



NOAA
C.Award
Exercises
for
FY 2021 Training
Version 1.0

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	11/27/20	New FY 2021 Training Exercises	E.Cobbs/FSD CSB – Training

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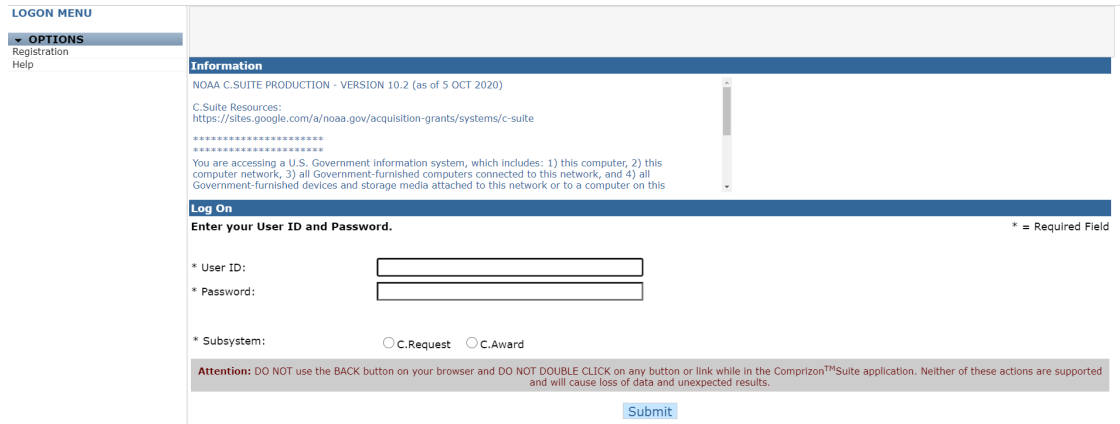
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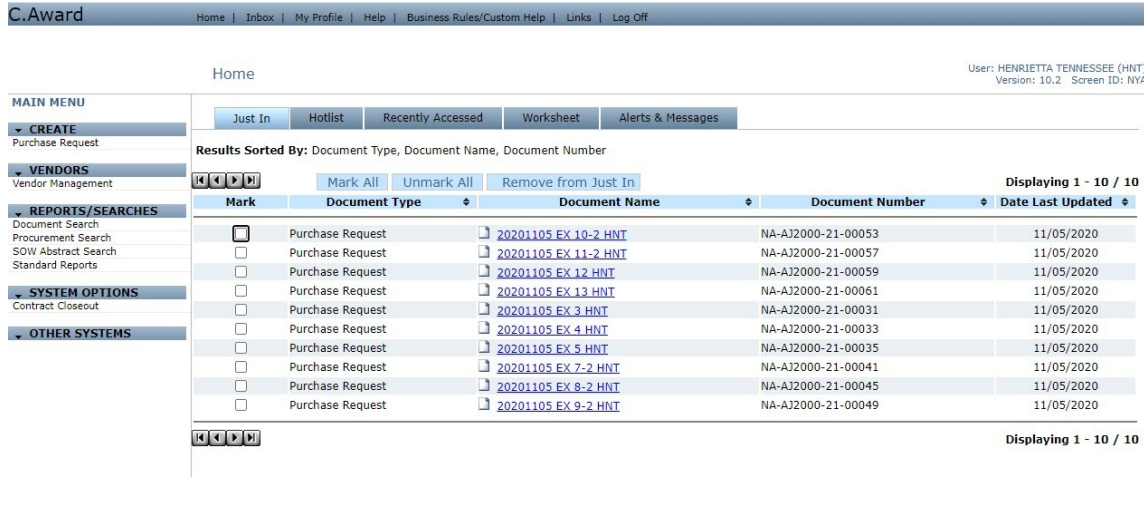
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Exercise #1: Login to C.Award

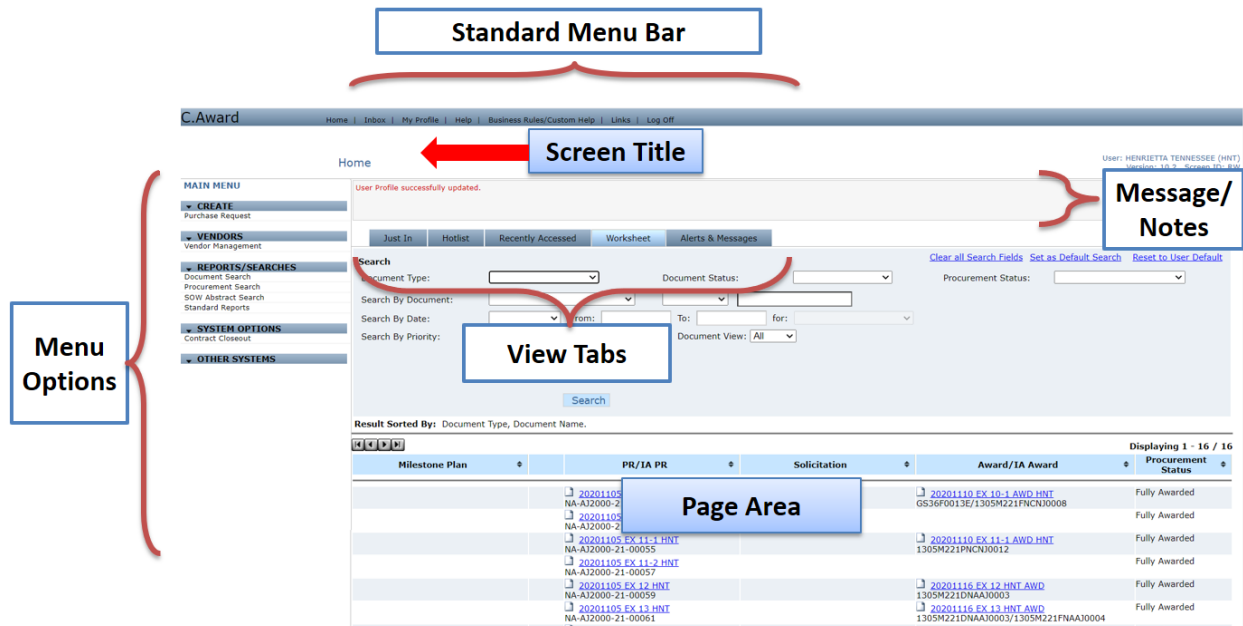
- Objectives:
- Successfully Login to C.Award
 - Access C.Award Home Page
 - Understand the Navigation Terms

Instructions: Execute the following steps:

Step	Action
1	<ul style="list-style-type: none"> ➤ Open Internet Explorer ➤ Type in the URL provided to you by the instructor
2	<p>On the Login Screen:</p> <ul style="list-style-type: none"> ➤ Enter your <i>username</i> ➤ Entre the <i>temporary password</i> ➤ Click the radio button for <i>C.Award</i> ➤ Click <i>Submit</i> <div style="text-align: center; margin-top: 20px;"> <p>Welcome to ComprizonSuite Version 10.2</p> </div> 

Step	Action
3	<p>The Home screen appears:</p>  <p>Notes: 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 return to the Login screen.</p>

Navigation Terms



The diagram illustrates the layout of the C.Award application interface. Key components are labeled as follows:

- Standard Menu Bar:** Located at the top of the page, containing navigation links like Home, Inbox, My Profile, Help, Business Rules/Custom Help, Links, and Log Off.
- Screen Title:** The main heading of the page, in this case, "Home".
- Message/Notes:** A notification area on the right side of the page, displaying "User Profile successfully updated."
- Menu Options:** A vertical sidebar on the left containing various system functions such as CREATE, VENDORS, REPORTS/SEARCHES, SYSTEM OPTIONS, and OTHER SYSTEMS.
- View Tabs:** A set of tabs at the top of the main content area, including Just In, Hotlist, Recently Accessed, Worksheet, and Alerts & Messages.
- Page Area:** The central workspace containing search filters, a table of results, and sorting options.

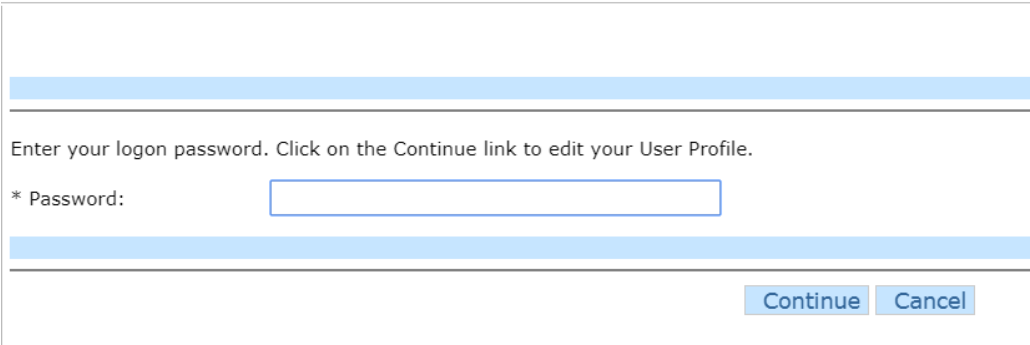
Exercise #2: Navigate to My Profile and Change Information

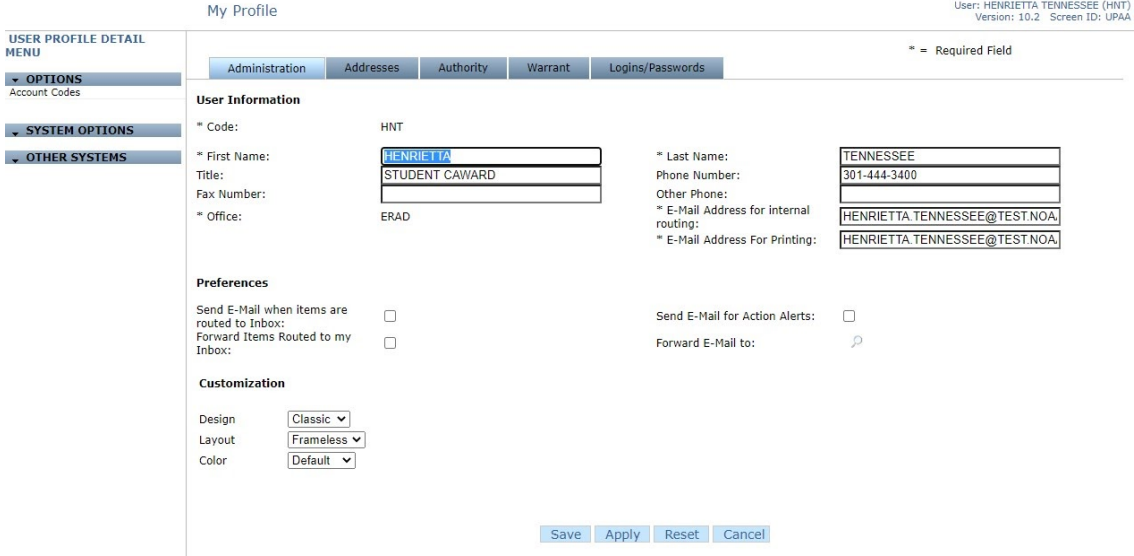
Objectives:

- Navigate to my profile
- Understand the features of your profile
- Know where you change your Password and Signature PIN


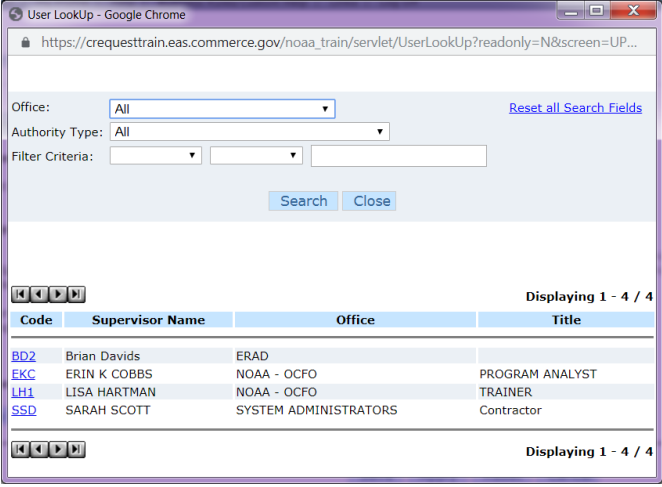
Instructions: Execute the following steps:

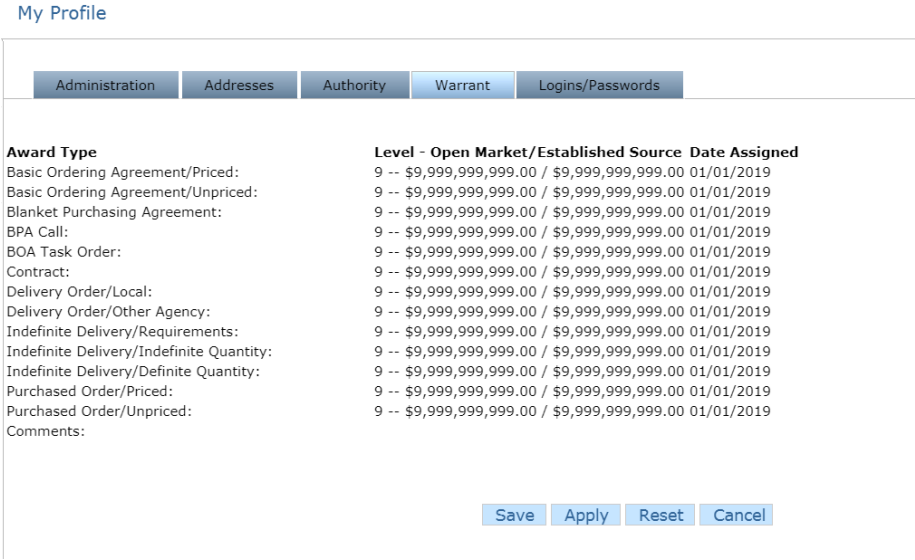
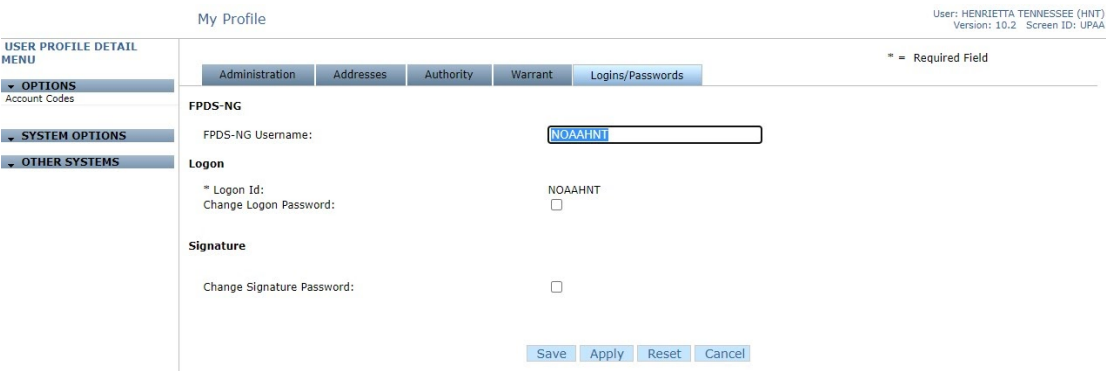
You have just received access to C.Award. The first time you log into the system, you will have to make sure to select the C.Award radio button as neither button will be selected. Once logged in you will then be able to verify and update fields on your profile. My Profile is where you can change your 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 <i>Standard Menu Bar</i>
2	The Verify User screen appears: ➤ Enter your temporary password  ➤ Click Continue

Step	Action
<p>3</p>	<p>The My Profile screen appears. Under the <i>Administration</i> tab:</p> <ul style="list-style-type: none"> ➤ Verify 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 <i>Addresses</i> tab 
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>In production, you will only verify the information is correct in each of the fields. These fields are populated by the information provided by users when signing up for access to C.Suite</i> ✓ <i>Under the preferences section, a Contracting Specialist will only check the box for action items.</i> ✓ <i>This will set the system to send you emails when an action needs to be taken or has been taken (i.e. to whom it was sent to for approval, final approval, rejected or accepted by CFS, etc.).</i> ✓ <i>A Reviewing or Approving Official (i.e. Contracting Officer) will want to have the checkbox checked when items are sent to their inbox. This will send emails when a document is awaiting review or approval.</i>

Step	Action
<p>3a</p>	<p>Under the <i>Addresses</i> view tab:</p> <ul style="list-style-type: none"> ➤ Verify or add addresses ➤ Click the <i>Authority</i> tab <div style="text-align: center; margin-top: 10px;">My Profile</div> <hr/> <div style="display: flex;"> <div style="flex: 1; border-right: 1px solid #ccc; padding-right: 5px;"> <p>USER PROFILE DETAIL MENU</p> <ul style="list-style-type: none"> ▼ OPTIONS Account Codes ▼ SYSTEM OPTIONS ▼ OTHER SYSTEMS C.Request </div> <div style="flex: 2; padding-left: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Administration Addresses Authority Warrant Logins/Passwords </div> <p>Contracting Office: <input type="text" value="AJ240012"/> </p> <p>FINANCIAL SYSTEMS DIVISION /OFA24 200 PERRY PARKWAY SUITE 10 GAITHERSBURG MD 20877</p> <p>Purchase For: <input type="text" value="AJ151200"/> </p> <p>NOAA/OCIO/ISMO/ADS/FINANCE SYS ADMIN BRANCH 20020 CENTURY BLVD GERMANTOWN MD 20879</p> <p>Deliver To: <input type="text" value="AJ151200"/> </p> <p>NOAA/OCIO/ISMO/ADS/FINANCE SYS ADMIN BRANCH 20020 CENTURY BLVD GERMANTOWN MD 20879</p> <p>Ultimate Destination: <input type="text" value="AJ151200"/> </p> <p>NOAA/OCIO/ISMO/ADS/FINANCE SYS ADMIN BRANCH 20020 CENTURY BLVD GERMANTOWN MD 20879</p> </div> </div> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The first time you access C.Award in production, these fields will be blank.</i> ✓ <i>You have the ability to add your addresses in these fields.</i> ✓ <i>However, they will not populate the CR automatically; the addresses on the PR come from the Requisition.</i> </div>

Step	Action																				
<p>3b</p>	<p>Under the <i>Authority</i> tab:</p> <ul style="list-style-type: none"> ➤ View the Systems and Roles to which you have access ➤ Click on the <i>Supervisors</i> link ➤ When the new window opens up, click <i>Search</i>  <p>The screenshot shows the 'My Profile' page with the 'Authority' tab selected. The page includes a header with the user name 'HENRIETTA TENNESSEE (HNT)' and version information. Below the header are tabs for 'Administration', 'Addresses', 'Authority', 'Warrant', and 'Logins/Passwords'. The 'Authority' section contains a 'Subsystems' table with fields like 'C.Request' and 'C.Award'. Below that is an 'Authority Types' section with a grid of fields such as 'Buyer', 'Contract Specialist', 'Contract Administrator', 'COR', 'Contractor', 'Waiver Expiration Date', 'Contracting Officer', 'Administrative CO', 'Funds Certifying Officer', 'Invoice Examiner', 'P-Card Approving Official', and 'P-Card Administrator'. At the bottom of the 'Authority' section is a 'Supervisor' section with a 'View Supervisors' button. At the very bottom of the page are buttons for 'Save', 'Apply', 'Reset', and 'Cancel'.</p>																				
<p>3c</p>	<p>The <i>User Lookup</i> window appears with all individuals listed in the system as your supervisor.</p> <ul style="list-style-type: none"> ➤ Close this window when finished  <p>The screenshot shows a 'User Lookup' window in a Google Chrome browser. The window title is 'User Lookup - Google Chrome'. The address bar shows the URL: 'https://crequestrain.eas.commerce.gov/noaa_train/servlet/UserLookup?readonly=N&screen=UP...'. The window contains search filters for 'Office' (set to 'All'), 'Authority Type' (set to 'All'), and 'Filter Criteria'. There are 'Search' and 'Close' buttons. Below the filters is a table of results with columns 'Code', 'Supervisor Name', 'Office', and 'Title'. The table displays four rows of data. At the bottom of the table, it says 'Displaying 1 - 4 / 4'.</p> <table border="1" data-bbox="297 1570 938 1696"> <thead> <tr> <th>Code</th> <th>Supervisor Name</th> <th>Office</th> <th>Title</th> </tr> </thead> <tbody> <tr> <td>BD2</td> <td>Brian Davids</td> <td>ERAD</td> <td></td> </tr> <tr> <td>EKC</td> <td>ERIN K COBBS</td> <td>NOAA - OCFO</td> <td>PROGRAM ANALYST</td> </tr> <tr> <td>LH1</td> <td>LISA HARTMAN</td> <td>NOAA - OCFO</td> <td>TRAINER</td> </tr> <tr> <td>SSD</td> <td>SARAH SCOTT</td> <td>SYSTEM ADMINISTRATORS</td> <td>Contractor</td> </tr> </tbody> </table> <ul style="list-style-type: none"> ➤ Click on the <i>Warrants</i> tab 	Code	Supervisor Name	Office	Title	BD2	Brian Davids	ERAD		EKC	ERIN K COBBS	NOAA - OCFO	PROGRAM ANALYST	LH1	LISA HARTMAN	NOAA - OCFO	TRAINER	SSD	SARAH SCOTT	SYSTEM ADMINISTRATORS	Contractor
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Step	Action																																													
<p>3d</p>	<p>Under the <i>Warrants</i> tab:</p> <ul style="list-style-type: none"> ➤ View the warrant information (if any) ➤ Click the <i>Logins/Passwords</i> tab  <p>My Profile</p> <p>Administration Addresses Authority Warrant Logins/Passwords</p> <table border="1"> <thead> <tr> <th>Award Type</th> <th>Level - Open Market/Established Source</th> <th>Date Assigned</th> </tr> </thead> <tbody> <tr> <td>Basic Ordering Agreement/Priced:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Basic Ordering Agreement/Unpriced:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Blanket Purchasing Agreement:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>BPA Call:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>BOA Task Order:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Contract:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Delivery Order/Local:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Delivery Order/Other Agency:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Indefinite Delivery/Requirements:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Indefinite Delivery/Indefinite Quantity:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Indefinite Delivery/Definite Quantity:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Purchased Order/Priced:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Purchased Order/Unpriced:</td> <td>9 -- \$9,999,999,999.00 / \$9,999,999,999.00</td> <td>01/01/2019</td> </tr> <tr> <td>Comments:</td> <td></td> <td></td> </tr> </tbody> </table> <p>Save Apply Reset Cancel</p>	Award Type	Level - Open Market/Established Source	Date Assigned	Basic Ordering Agreement/Priced:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Basic Ordering Agreement/Unpriced:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Blanket Purchasing Agreement:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	BPA Call:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	BOA Task Order:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Contract:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Delivery Order/Local:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Delivery Order/Other Agency:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Indefinite Delivery/Requirements:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Indefinite Delivery/Indefinite Quantity:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Indefinite Delivery/Definite Quantity:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Purchased Order/Priced:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Purchased Order/Unpriced:	9 -- \$9,999,999,999.00 / \$9,999,999,999.00	01/01/2019	Comments:		
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<p>3e</p>	<p>Under the <i>Logins/Passwords</i> tab:</p> <ul style="list-style-type: none"> ➤ Check the box Change Logon Password ➤ Check the box Change Signature Password ➤ Enter & Confirm New Password ➤ Enter & Confirm New Signature PIN ➤ Click <i>Save</i>  <p>My Profile</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: UPAA</p> <p>USER PROFILE DETAIL MENU</p> <p>Administration Addresses Authority Warrant Logins/Passwords</p> <p>* = Required Field</p> <p>FPDS-NG</p> <p>FPDS-NG Username: NOAAHNT</p> <p>Logon</p> <p>* Logon Id: NOAAHNT</p> <p>Change Logon Password: <input checked="" type="checkbox"/></p> <p>Signature</p> <p>Change Signature Password: <input checked="" type="checkbox"/></p> <p>Save Apply Reset Cancel</p>																																													

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none">✓ <i>The FPDS-NG field should be filled in with your login information (email).</i><ul style="list-style-type: none">○ <i>For training purposes this is left blank.</i>✓ <i>Click Apply to save the information but keep you on the same screen.</i>✓ <i>Click Save to save the information and return to the previous screen.</i>
4	The Home screen appears.

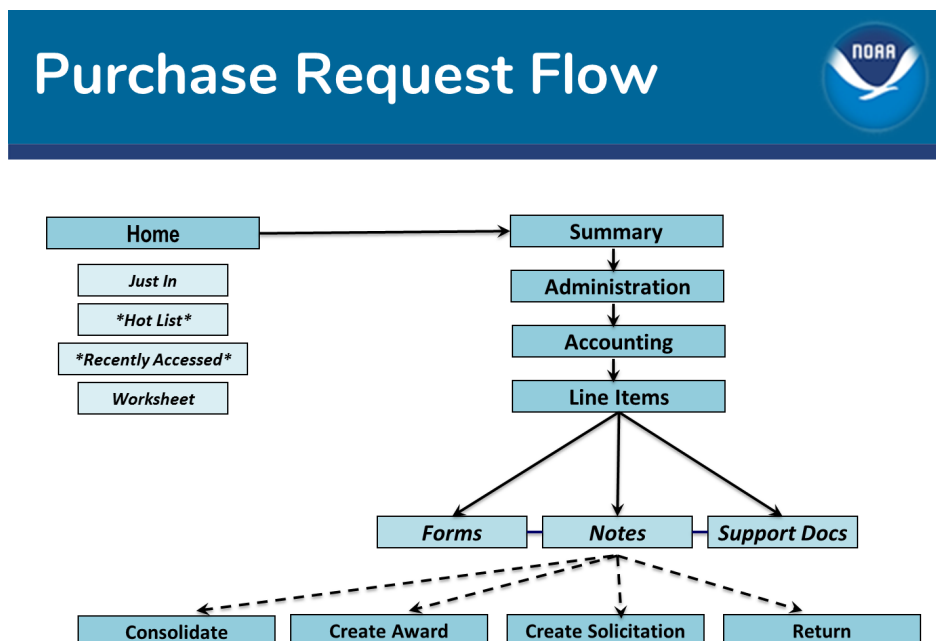
Exercise #3: Open Purchase Request (PR) - Return

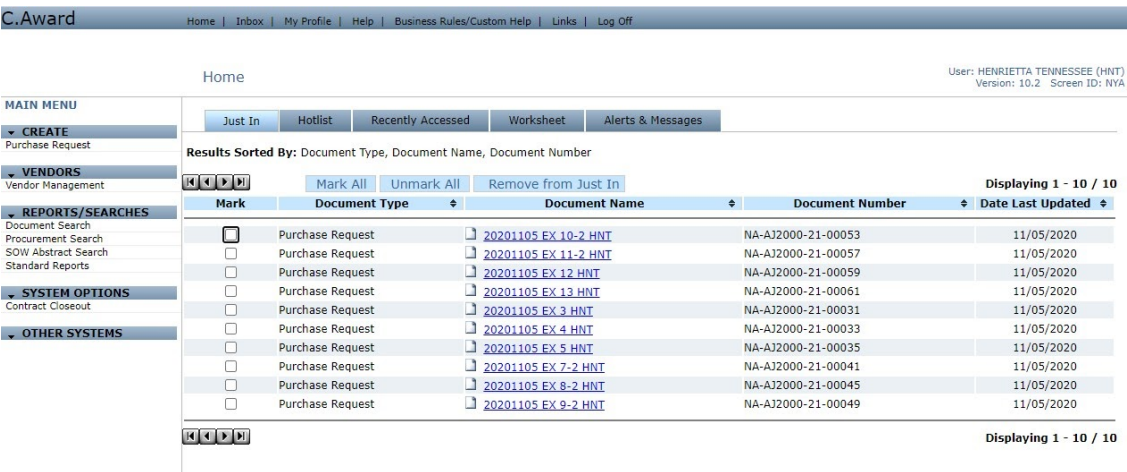
- Objectives:
- Navigate through C.Award
 - Open PR
 - Understand the pieces of PR to review
 - Follow flow chart
 - Understand how to return a PR


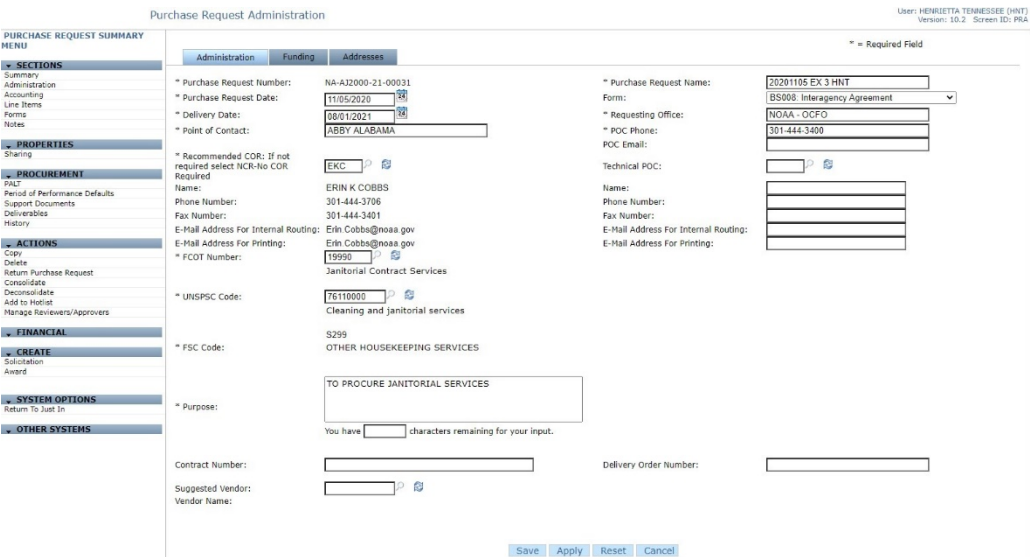
Instructions: Execute the following steps:

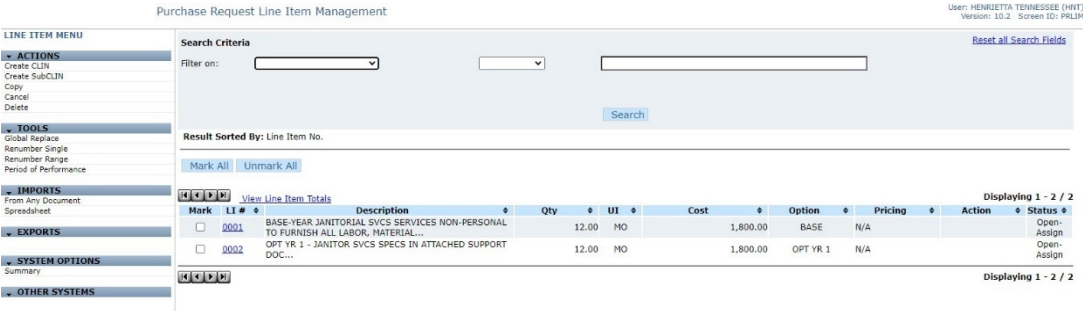
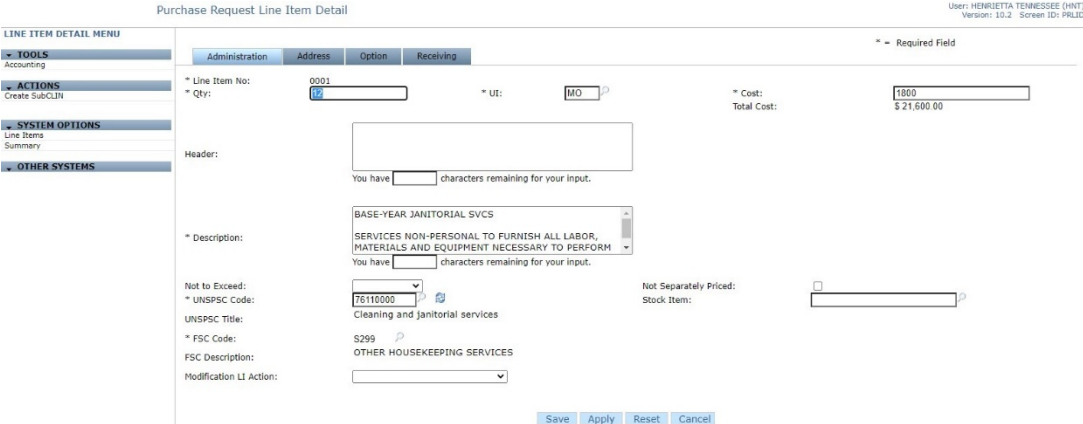
Notes: All PR's must be reviewed in full prior to taking ANY action on them. It is up to the discretion of the Contracting Specialist working with the PR whether to return it to the requesting office. The policy is to have the requesting office submit a second PR to combine with the initial one once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

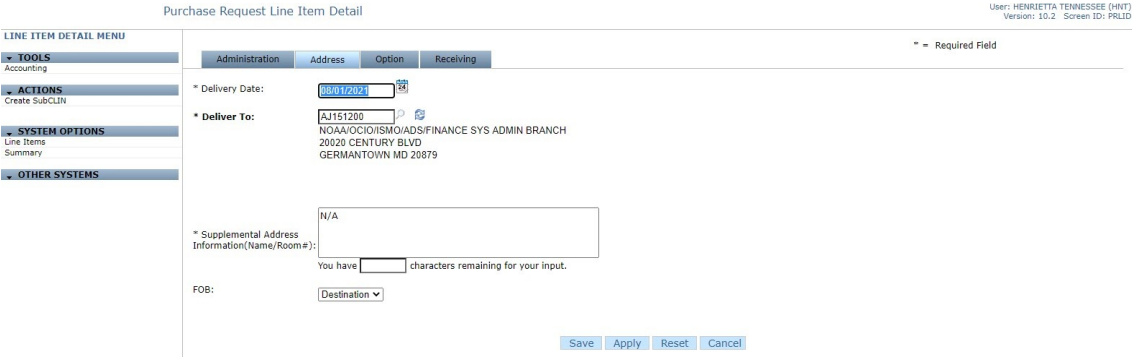

A Purchase Request has been assigned to you. You will find it in your *Just In* tab on the **Home** screen. You need to review all the aspects of it prior to taking any action. Follow the process indicated on the flow chart.

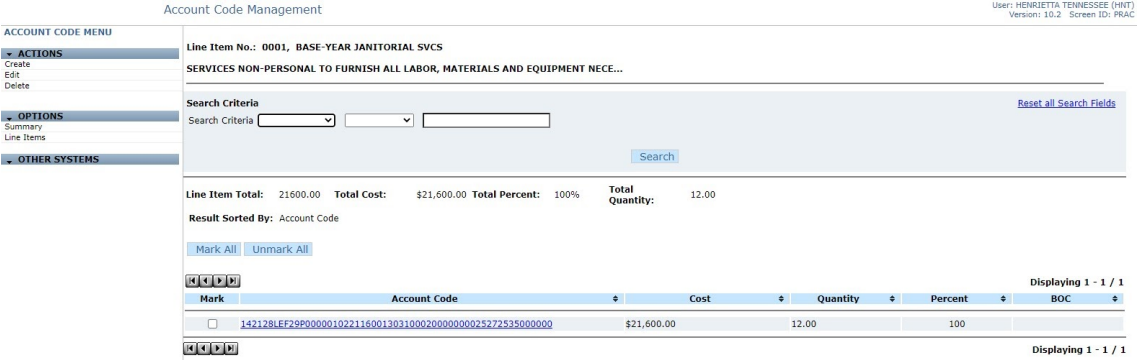
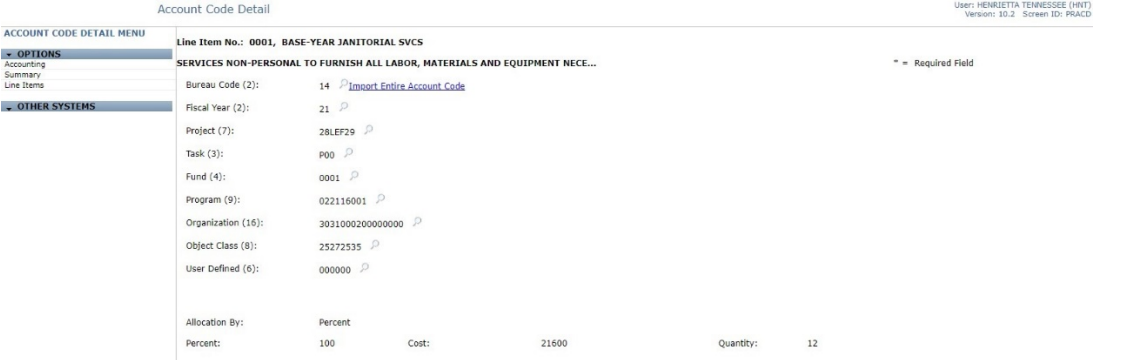


Step	Action
<p>1</p>	<p>From the Home screen <i>Just In</i> tab.</p> <p>➤ Click the <i>PR#</i></p>  <p>The screenshot shows the C.Award Home interface. At the top, there is a navigation bar with 'Home', 'Inbox', 'My Profile', 'Help', 'Business Rules/Custom Help', 'Links', and 'Log Off'. Below this is a 'Home' header with a user profile for 'HENRIETTA TENNESSEE (HNT)' and version information. A 'MAIN MENU' sidebar on the left includes sections for 'CREATE', 'VENDORS', 'REPORTS/SEARCHES', 'SYSTEM OPTIONS', and 'OTHER SYSTEMS'. The main content area is titled 'Just In' and shows a table of documents. The table has columns for 'Mark', 'Document Type', 'Document Name', 'Document Number', and 'Date Last Updated'. All documents listed are 'Purchase Request' type, with document names ranging from '20201105 EX 10-2 HNT' to '20201105 EX 9-2 HNT'. The 'Date Last Updated' for all is '11/05/2020'. There are navigation controls at the top and bottom of the table, and a 'Results Sorted By' indicator above the table.</p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The first time something is assigned to you, it will appear in the Just In tab.</i> ✓ <i>If you have already opened the document, you will need to locate it in the Recently Accessed or Worksheet view tabs.</i>


Step	Action
2	<p>The Purchase Request Summary screen appears:</p> 
2a	<p>From this screen you can tell at a high level all information about the request. However, to fully understand the detail, you will need to open each area and review the data.</p> <p>➤ Click the <i>Administration</i> menu option</p>
3	<p>The Purchase Request Administration screen appears:</p> 

Step	Action
3a	<p>Review each field on each tab of this screen to ensure that all of the fields have been filled out properly. (i.e. FCOT #, UNSPSC Code, etc.)</p> <p>Once finished reviewing:</p> <ul style="list-style-type: none"> ➤ Click the <i>Line Items</i> menu option <p>Notes: They are slowly removing the UNSPSC codes that end in zeros, so make sure where you are seeing something other than 0000 at the end of the code.</p>
4	<p>The Purchase Request Line Item Management screen appears:</p>  <ul style="list-style-type: none"> ➤ Click the first <i>Line Item #</i>
4a	<p>The Purchase Request Line Item Detail screen <i>Administration</i> tab appears:</p>  <ul style="list-style-type: none"> ➤ Review all parts of the <i>Administration</i> tab ➤ Click the <i>Address</i> tab

Step	Action
	<p>Notes: You must review all fields on all tabs of the line item.</p>
<p>4b</p>	<p>The Purchase Request Line Item Detail screen <i>Address</i> tab appears:</p>  <p>➤ Review Delivery Date and Address information</p> <p>➤ Click the <i>Option</i> tab</p>
<p>4c</p>	<p>The Purchase Request Line Item Detail screen <i>Option</i> tab appears:</p>  <p>➤ Review option period</p> <p>➤ Click <i>Apply</i> (if you made any changes)</p> <p>➤ Click the <i>Accounting</i> menu option</p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ If this Purchase Request is for a contract that has a base and option periods, this tab shows an option and the dates associated with it otherwise it will be blank. ✓ Review this information <i>ONLY</i> if there are option periods on the PR. ✓ Use <i>Apply</i> to save the data so that you may view the accounting information for the line.

Step	Action
4d	<p>The Account Code Management screen appears:</p>  <p>➤ Click the ACCS you wish to view</p>
4e	<p>The Account Code Detail screen appears:</p> 

Step	Action
4e1	<p>There are a few things that need to be reviewed on the ACCS Detail:</p> <ul style="list-style-type: none"> • Fiscal Year should reflect the year the expense is being purchased. • Object Class code, especially the last 4 digits should be correct. That can be verified at the following website: http://www.corporateservices.noaa.gov/finance/objectclasses.html • Be aware of the type of allocation: was it by percent or by cost/quantity? Down the line if you need to change costs that may mean you will have to make changes on the Accounting. <p>When you are finished reviewing:</p> <ul style="list-style-type: none"> ➤ Click the <i>Line Items</i> menu option ➤ Finish reviewing the other line(s) and accounting <p>When finished:</p> <ul style="list-style-type: none"> ➤ Click the <i>Summary</i> menu option <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>For NOAA Link the object classes should end in 0011</i> ✓ <i>For AGO Fee For Service (FFS) the object class should end in 2517 for Non-Simplified Acquisitions</i> ✓ <i>For AGO FFS the object class should end in 2535 for Simplified Acquisitions</i> ✓ <i>For ProTech the object class should end in 2603</i> ✓ <i>Actual Accounting Codes (ACCS) can only be changed by the office that sent the PR</i> ✓ <i>Option Periods should not have an accounting line associated to them</i>
5	<p>Be sure to look at any notes, forms and support documents. All these options are accessible from the Purchase Request Summary screen. You can download documents from the Support Documents screen to attach them to the award.</p>
6	<p>From the Purchase Request Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Return Purchase Request</i> menu option

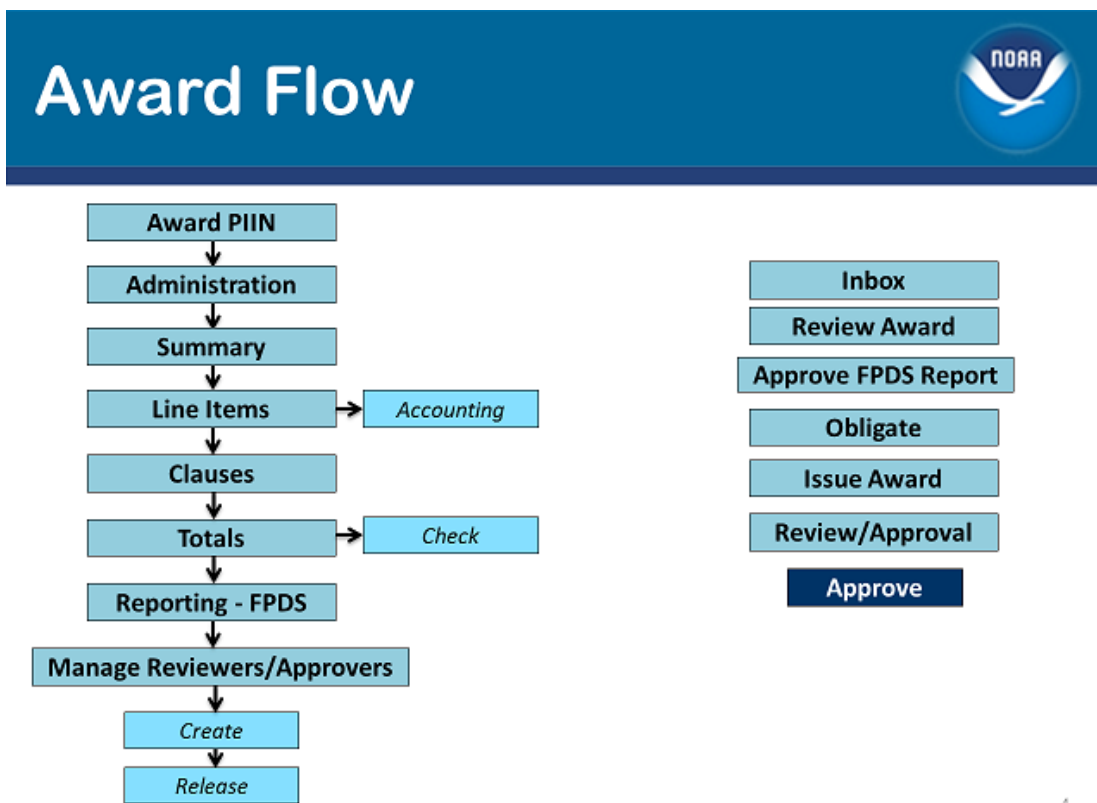
Step	Action
<p>8</p>	<p>The Return Purchase Request Comments screen appears:</p>  <p>Before you can send it back to the requisitioner, you must first add comments indicating why it's being returned.</p> <ul style="list-style-type: none"> ➤ Click in the <i>Comments</i> field ➤ Enter the reason for returning ➤ Click <i>Save</i>
<p>9</p>	<p>The Home screen appears with a message at the top of the screen stating the document has been successfully returned.</p>

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

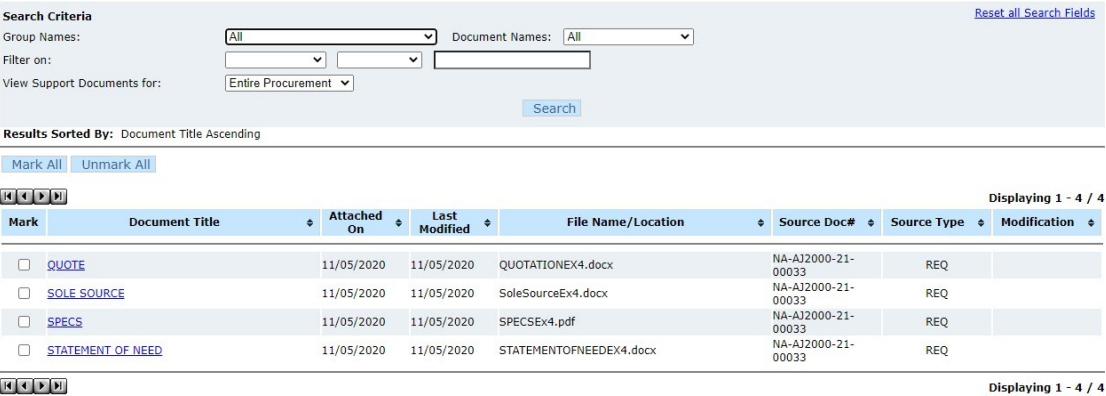
- Objectives:
- Navigate through C.Award
 - Create an Award from a Purchase Request
 - Follow flow chart

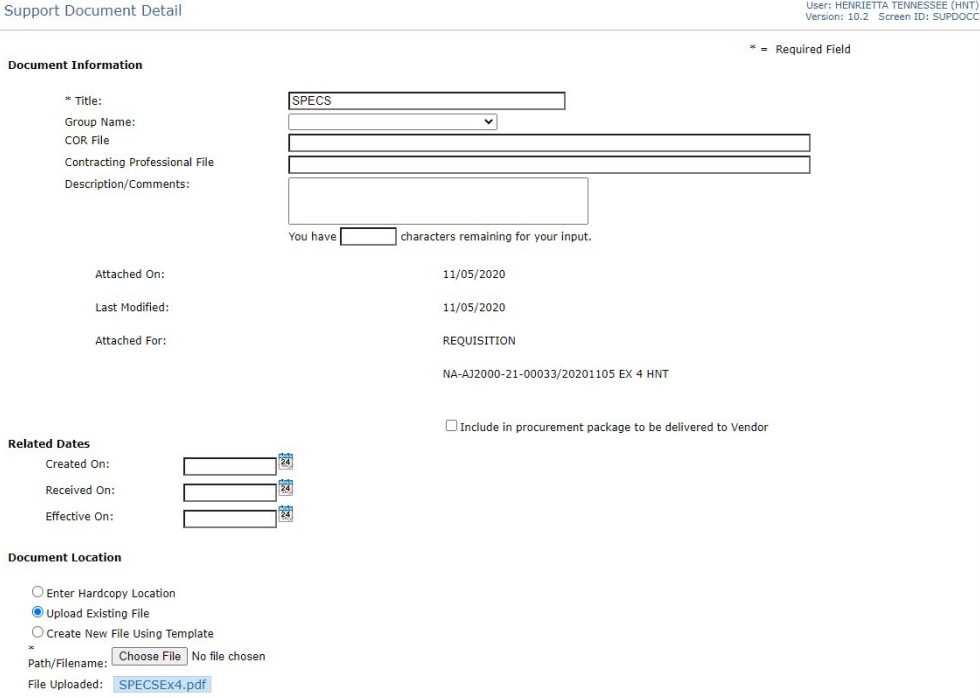
Instructions: Execute the following steps:

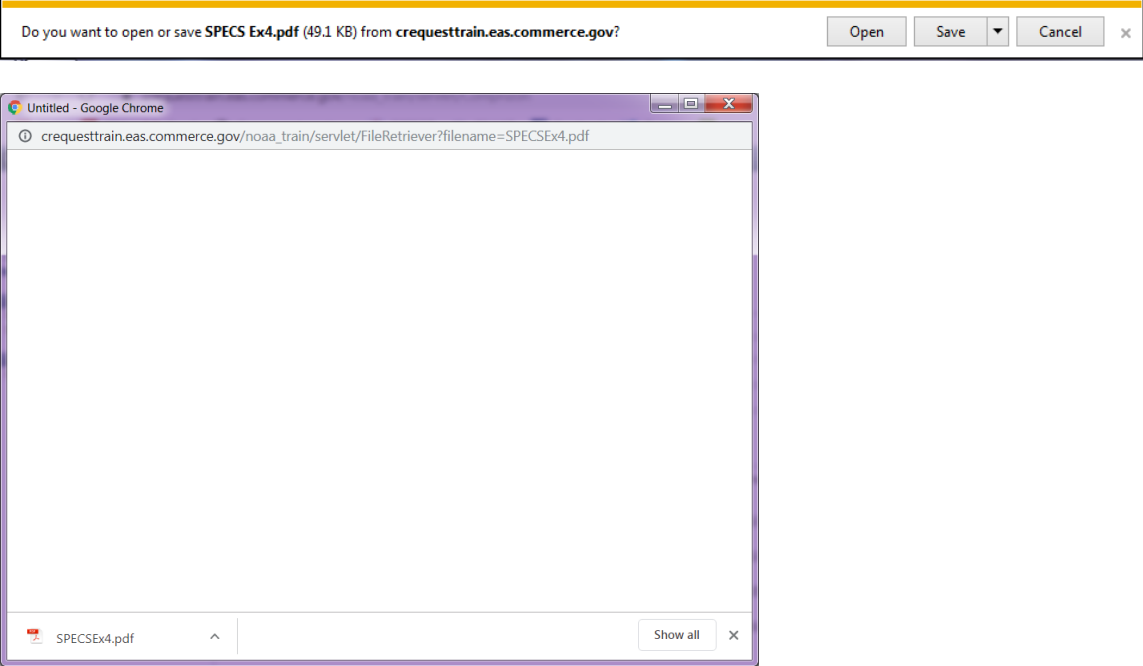
Notes: You have received a Purchase Request. You will need to review the PR prior to making the award. Once cleared, you will use the following steps in creating the award.

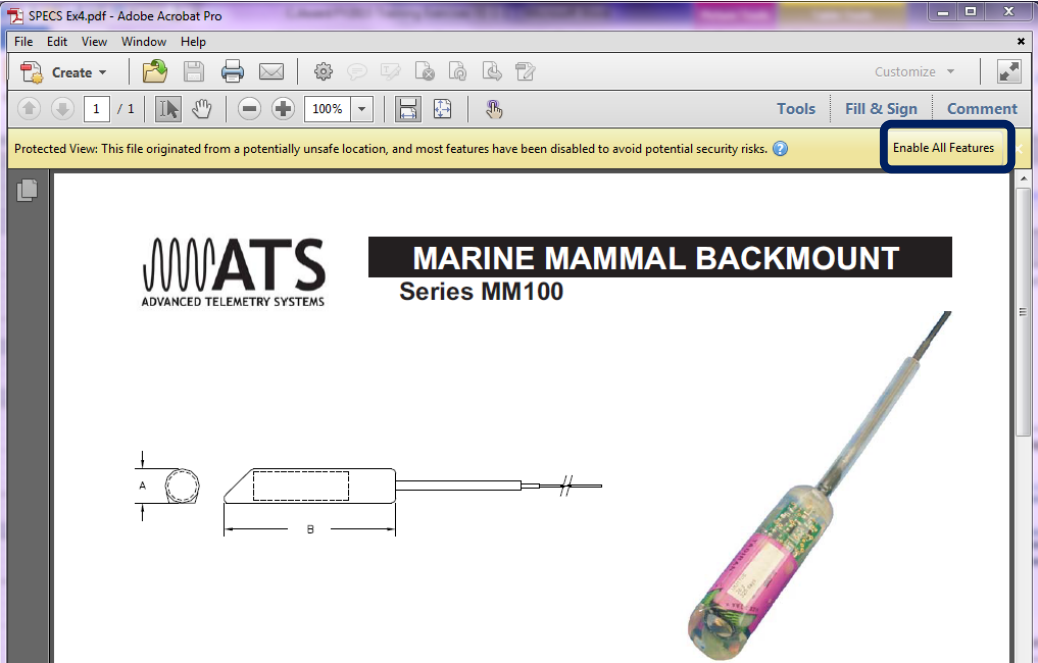
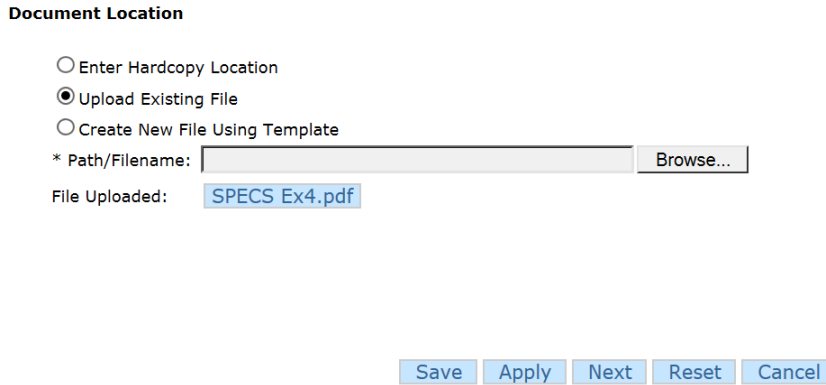


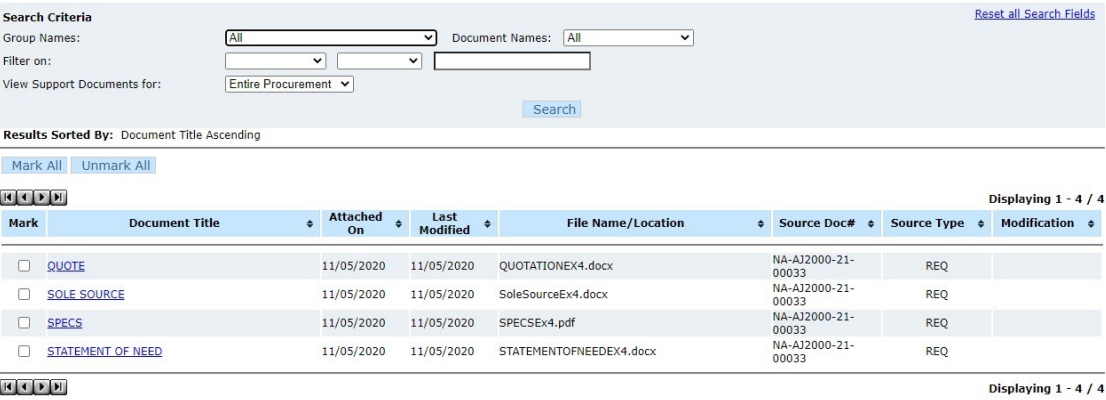
Step	Action
1	From the Home screen, click the <i>Just In</i> tab. ➤ Click <i>PR#</i>

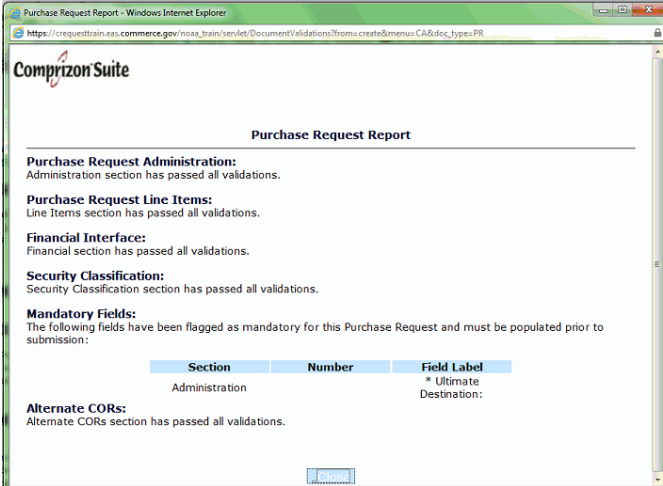
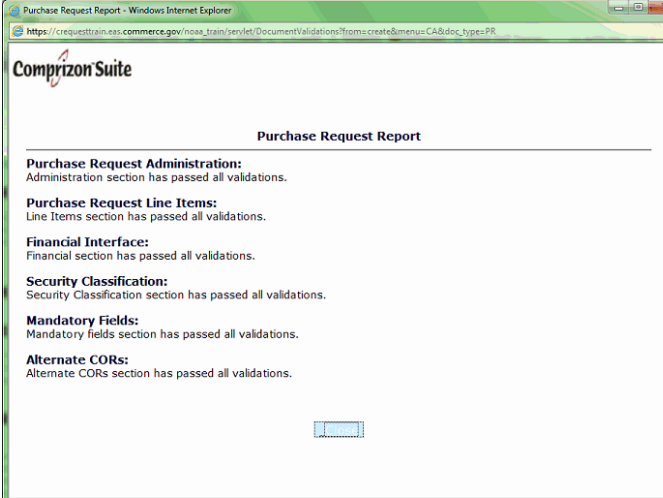
Step	Action																																								
	<ul style="list-style-type: none"> ➤ Review the PR in its entirety ➤ Review any Support Documents ➤ Click the <i>Support Documents</i> menu option 																																								
1a	<p>The Support Document Management screen appears. If there are support documents attached, they will appear when you open this screen.</p>  <p>The screenshot shows the 'Support Document Management' interface. At the top, there are search criteria including 'Group Names' (set to 'All'), 'Filter on' (empty), and 'View Support Documents for' (set to 'Entire Procurement'). A 'Search' button is present. Below this, it says 'Results Sorted By: Document Title Ascending'. There are 'Mark All' and 'Unmark All' buttons. A table displays the following data:</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>Document Title</th> <th>Attached On</th> <th>Last Modified</th> <th>File Name/Location</th> <th>Source Doc#</th> <th>Source Type</th> <th>Modification</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>QUOTE</td> <td>11/05/2020</td> <td>11/05/2020</td> <td>QUOTATIONEX4.docx</td> <td>NA-AJ2000-21-00033</td> <td>REQ</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SOLE SOURCE</td> <td>11/05/2020</td> <td>11/05/2020</td> <td>SoleSourceEx4.docx</td> <td>NA-AJ2000-21-00033</td> <td>REQ</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>SPECS</td> <td>11/05/2020</td> <td>11/05/2020</td> <td>SPECSEx4.pdf</td> <td>NA-AJ2000-21-00033</td> <td>REQ</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td>STATEMENT OF NEED</td> <td>11/05/2020</td> <td>11/05/2020</td> <td>STATEMENTOFNEEDEX4.docx</td> <td>NA-AJ2000-21-00033</td> <td>REQ</td> <td></td> </tr> </tbody> </table> <p>Navigation controls at the bottom include 'Mark All', 'Unmark All', and 'Displaying 1 - 4 / 4'.</p> <p>To open a document in order to save it to your workstation, click the link of the one you want to open. For this example, Click on SPECS.</p>	Mark	Document Title	Attached On	Last Modified	File Name/Location	Source Doc#	Source Type	Modification	<input type="checkbox"/>	QUOTE	11/05/2020	11/05/2020	QUOTATIONEX4.docx	NA-AJ2000-21-00033	REQ		<input type="checkbox"/>	SOLE SOURCE	11/05/2020	11/05/2020	SoleSourceEx4.docx	NA-AJ2000-21-00033	REQ		<input type="checkbox"/>	SPECS	11/05/2020	11/05/2020	SPECSEx4.pdf	NA-AJ2000-21-00033	REQ		<input type="checkbox"/>	STATEMENT OF NEED	11/05/2020	11/05/2020	STATEMENTOFNEEDEX4.docx	NA-AJ2000-21-00033	REQ	
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<input type="checkbox"/>	SPECS	11/05/2020	11/05/2020	SPECSEx4.pdf	NA-AJ2000-21-00033	REQ																																			
<input type="checkbox"/>	STATEMENT OF NEED	11/05/2020	11/05/2020	STATEMENTOFNEEDEX4.docx	NA-AJ2000-21-00033	REQ																																			


Step	Action
<p>1b</p>	<p>The Support Document Detail screen appears. You may have to scroll to get to the bottom of the screen.</p> 
<p>1b1</p>	<p>At the bottom of the screen is the file you want. Click the name to open:</p> <p>File Uploaded: SPECSEX4.pdf</p>
<p>1c</p>	<p>Once clicked, there may be a pop-up window that appears.</p> <p>➤ Click <i>Save</i></p> <p>Or it may show up already downloading (depending upon the browser)</p>

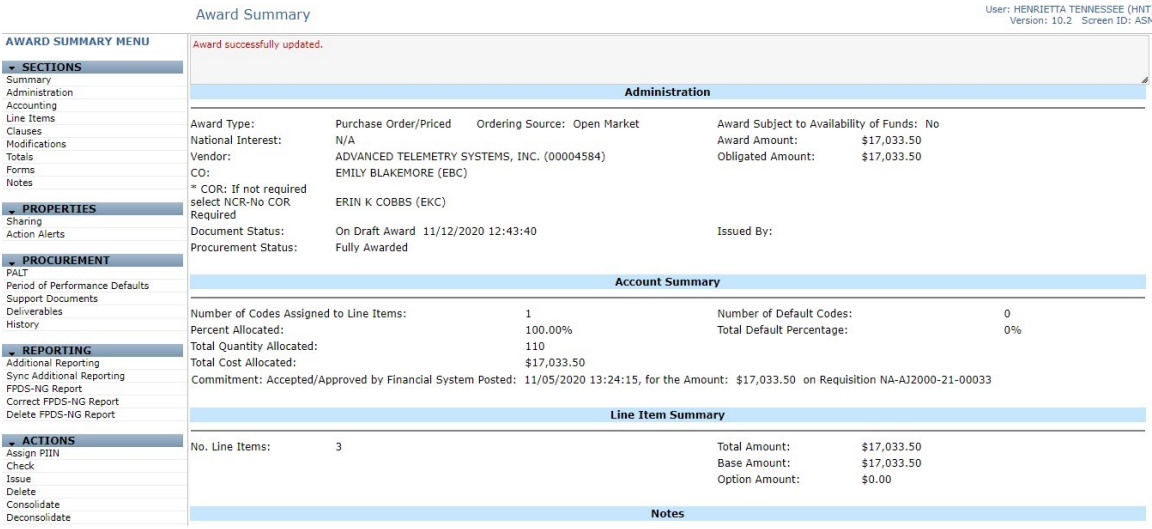
Step	Action
1d	<p data-bbox="302 302 1325 373">At the bottom of the browser window this prompt should appear after finished downloading or a new window will appear.</p>  <p data-bbox="302 1146 618 1234">➤ Click <i>Open</i> ➤ Or click on it to open</p>

Step	Action
1e	<p>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 <i>Enable All Features</i> button.</p> 
1f	<p>You can now edit the document as well as save it to your workstation.</p> <ul style="list-style-type: none"> ➤ Open C.Award again
1g	<p>At the bottom of the screen, click <i>Cancel</i></p> 

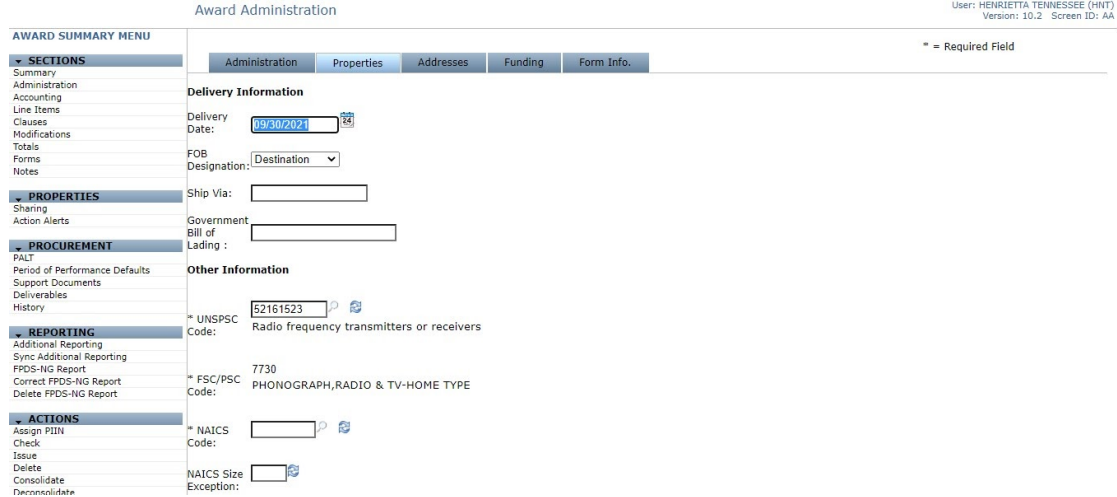
Step	Action
<p>1h</p>	<p>The Support Document Management screen appears again.</p>  <p>Save any other necessary documents. When finished click the <i>Summary</i> menu option.</p>
<p>2</p>	<p>From the Purchase Request Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Create Award</i> menu option

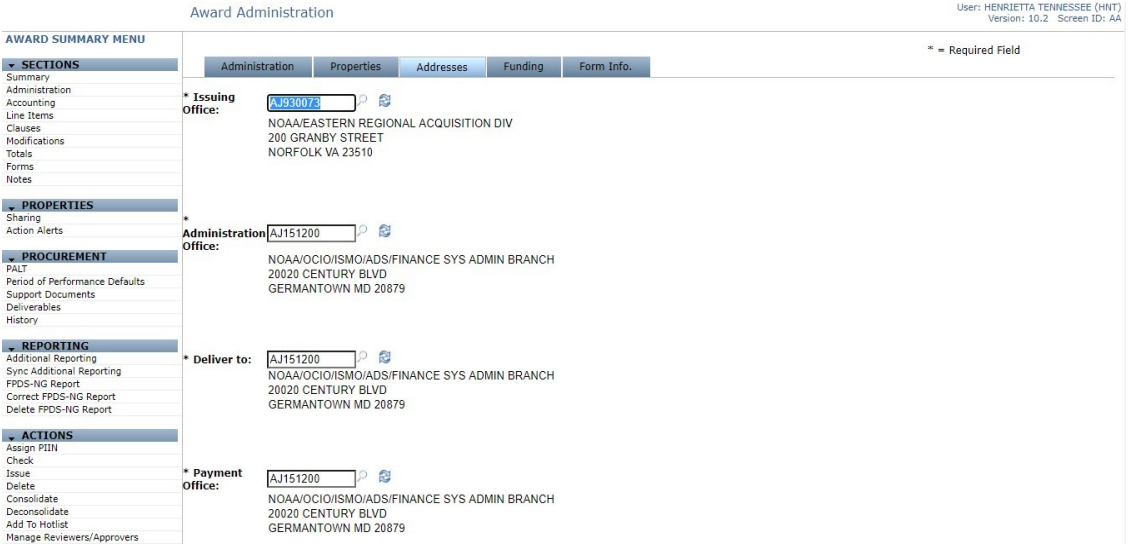
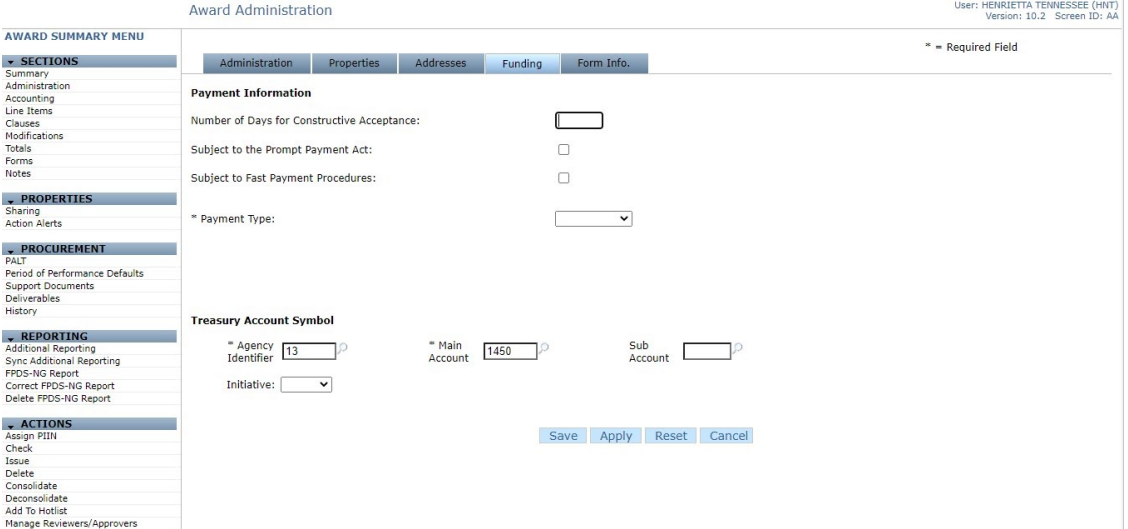
Step	Action
3	<p>The Purchase Request Report pop-up window will appear. If anything doesn't pass validation, you will receive something like this:</p>  <p>If everything passes, you might see a message briefly that looks like the image below:</p>  <ul style="list-style-type: none"> ➤ Maximize the minimized window ➤ Click <i>Close</i>

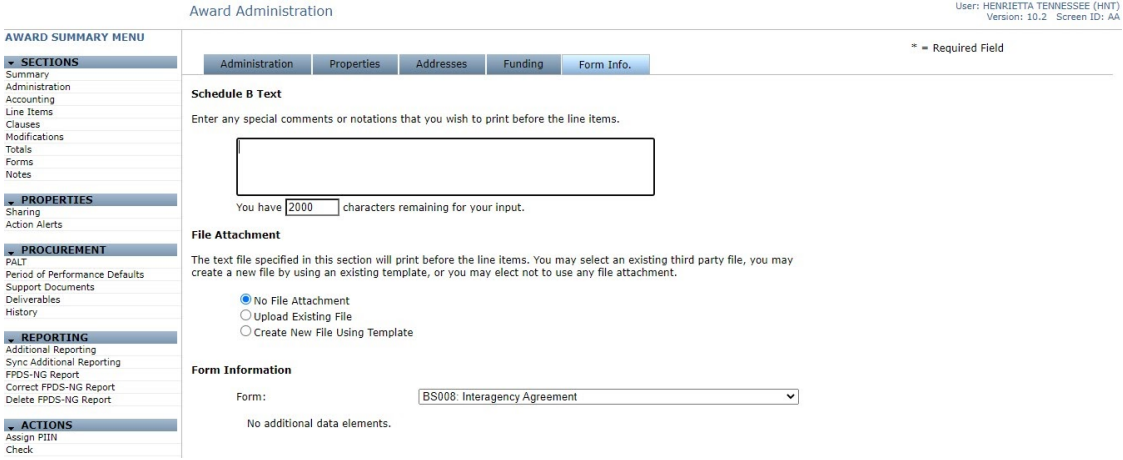
Step	Action
4	<p>The Award PIIN and Name screen appears:</p>  <p>Note: The Award Type defaults to the last one that was used.</p>
4a	<p>The Award Types are:</p> <ul style="list-style-type: none"> ➤ Basic Ordering Agreement/Priced (BOA) ➤ Basic Ordering Agreement/UnPriced Blanket Purchasing Agreement (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 <p>Note: The FAR parts, 12, 13 and 16 have different contract types. https://www.acquisition.gov/far</p>

Step	Action
4b	<p>There are 5 fields for Document Number:</p> <ul style="list-style-type: none"> ➤ 1st Field - AGO Office (i.e. defaults to user’s office) ➤ 2nd Field - Fiscal Year (i.e defaults to the current FY) ➤ 3rd Field - Contract Type (i.e defaults to the letter used for contract type selected) ➤ 4th Field - Line Office (i.e. Must be selected based on the LO Requisition) ➤ 5th Field - Sequential Number
5	<ul style="list-style-type: none"> ➤ Select the Contract type (i.e. Purchase Order Priced) ➤ Select the Award Number (i.e.1305M2-FY-P-####-????) ➤ Type the Award Name (i.e. {DATE} EX 4 {TRAINING ID} AWD) ➤ Click <i>Save</i>
6	<p>The Award Administration screen <i>Administration</i> tab appears:</p>  <p>The screenshot shows the 'Award Summary' page with the following details:</p> <ul style="list-style-type: none"> AWARD SUMMARY MENU: SECTIONS (Summary, Administration, Accounting, Line Items, Clauses, Modifications, Totals, Forms, Notes), PROPERTIES (Sharing, Action Alerts), PROCUREMENT (PALT, Period of Performance Defaults, Support Documents, Deliverables, History), REPORTING (Additional Reporting, Sync Additional Reporting, FPDS-NG Report, Correct FPDS-NG Report, Delete FPDS-NG Report), ACTIONS (Assign PIIN, Check, Issue, Delete, Consolidate, Deconsolidate). Administration Tab: Award Type: Purchase Order/Priced; Ordering Source: Open Market; Award Subject to Availability of Funds: No; National Interest: N/A; Vendor: ADVANCED TELEMETRY SYSTEMS, INC. (00004584); CO: EMILY BLAKEMORE (EBC); Document Status: On Draft Award 11/12/2020 12:43:40; Procurement Status: Fully Awarded; Issued By: ERIN K COBBS (EKC). Account Summary: Number of Codes Assigned to Line Items: 1; Percent Allocated: 100.00%; Total Quantity Allocated: 110; Total Cost Allocated: \$17,033.50; Number of Default Codes: 0; Total Default Percentage: 0%. Line Item Summary: No. Line Items: 3; Total Amount: \$17,033.50; Base Amount: \$17,033.50; Option Amount: \$0.00.

Step	Action	
6a	<p>On the <i>Administration</i> tab fill out the following fields:</p> <ul style="list-style-type: none"> ➤ Enter the CO (i.e. EBC) ➤ Change the Award Date (i.e. Defaults to current date) ➤ Enter the Signed On Date (i.e. Same as award date) ➤ Enter the Start Date (i.e. For training purposes same as award date) ➤ Enter the Expiration Date (i.e. Delivery Date of PR) ➤ Enter the Est. Ultimate Completion Date (i.e. Delivery Date of PR) ➤ Enter the Vendor (i.e. should be filled out ADVANCED TELEMETRY SYSTEMS, INC.) ➤ Enter the Business Size Indicator (i.e. Small) ➤ Enter the Number of Offers per Award (i.e. 1) ➤ Click the <i>Properties</i> tab 	
6a1	Date Field	Description
	<i>Award Date</i>	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.
	<i>Signed on Date</i>	In most cases this is generally the same date as the award date.
	<i>Start Date</i>	This may be different from the award date but should be consistent with your agreement with the Contractor.
	<i>Notice To Proceed Date</i>	This field 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.
	<i>Expiration Date</i>	It is critical for reporting purposes that the actual date the contract expires as agreed with the Contractor be entered in this field.
	<i>Est. Ultimate Completion Date</i>	This field represents the date in which all deliveries and payments should have been made.

Step	Action
7	<p>The Award Administration screen <i>Properties</i> tab appears:</p> 
7a	<ul style="list-style-type: none"> ➤ Change the Delivery Date (if needed) ➤ Change the FOB Designation (if needed) ➤ Enter the Ship Via: address ➤ Enter the NAICS Code (i.e. 334220) ➤ Enter the Reference Your (i.e. Quote) ➤ Check the Contractor required to sign checkbox ➤ Enter the # of copies to Issuing Office (i.e. 1) ➤ Enter the # of Invoice Copies (i.e. 3) ➤ Click the <i>Addresses tab</i>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>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.</i> ✓ <i>Freight on Board (FOB) – Destination is where the contractor is responsible for the shipping until it gets to the destination. Origin indicates who is responsible for shipping the merchandise to us.</i> ✓ <i>NAICS codes and exceptions can be found at: https://www.census.gov/eos/www/naics/.</i>

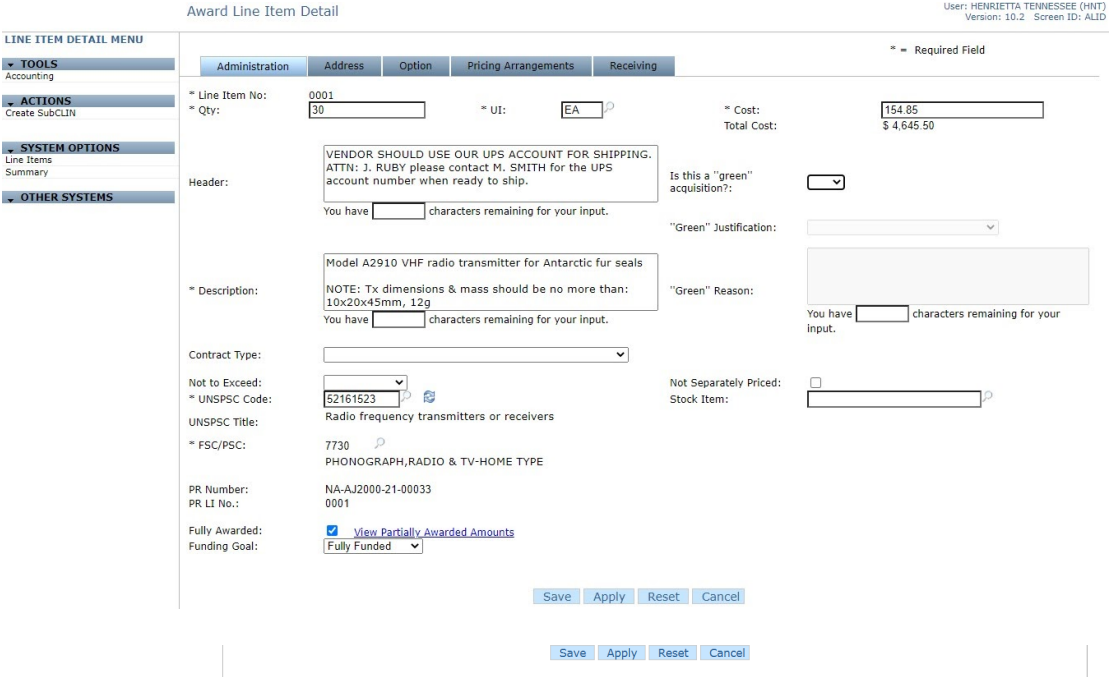
Step	Action
8	<p>The Award Administration screen <i>Addresses</i> tab appears:</p> 
8a	<p>If not added or needs to be changed:</p> <ul style="list-style-type: none"> ➤ Verify all addresses ➤ Click the <i>Funding</i> tab
9	<p>The Award Administration screen <i>Funding</i> tab appears:</p> 

Step	Action
9a	<ul style="list-style-type: none"> ➤ Enter the # of days for Constructive Acceptance (i.e. 007) ➤ Check the Subject to Prompt Pay checkbox ➤ Select the Payment Type (i.e. EFT) ➤ The Treasury Account Symbol defaults from the PR ➤ Click the <i>Form Info</i> tab <p style="background-color: yellow; padding: 5px;">Note: Failure to use anything but EFT for the payment type will result in errors when validating using the check feature.</p>
10	<p>The Award Administration screen <i>Form Info.</i> tab appears:</p> 
10a	<ul style="list-style-type: none"> ➤ Enter Schedule B text (if needed) ➤ Attach a file (if needed) ➤ Choose the form: (i.e. OF347) ➤ Click <i>Save</i>

Step	Action																																				
<p>11</p>	<p>The Award Summary screen appears:</p> <p>➤ Click the <i>Line Items</i> menu option</p>																																				
<p>12</p>	<p>The Award Line Item Management screen appears:</p> <thead> <tr> <th>Mark</th> <th>LI #</th> <th>Description</th> <th>Qty</th> <th>UI</th> <th>Cost \$</th> <th>Option</th> <th>Pricing</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0001</td> <td>Model A2910 VHF radio transmitter for Antarctic fur seals NOTE: Tx dimensions &...</td> <td>30.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0002</td> <td>Model A2910; Chinstrap Penguin glue on VHF transmitter; 165.000-165.999 kHz, 12g...</td> <td>40.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0003</td> <td>Model A2910; Adelle Penguin glue on VHF transmitter; 164.000-164.999 kHz, 12g...</td> <td>40.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> </tbody>	Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Status	<input type="checkbox"/>	0001	Model A2910 VHF radio transmitter for Antarctic fur seals NOTE: Tx dimensions &...	30.00	EA	154.85	N/A	N/A	Fully Awarded	<input type="checkbox"/>	0002	Model A2910; Chinstrap Penguin glue on VHF transmitter; 165.000-165.999 kHz, 12g...	40.00	EA	154.85	N/A	N/A	Fully Awarded	<input type="checkbox"/>	0003	Model A2910; Adelle Penguin glue on VHF transmitter; 164.000-164.999 kHz, 12g...	40.00	EA	154.85	N/A	N/A	Fully Awarded
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<input type="checkbox"/>	0003	Model A2910; Adelle Penguin glue on VHF transmitter; 164.000-164.999 kHz, 12g...	40.00	EA	154.85	N/A	N/A	Fully Awarded																													

 The screen also shows 'View Line Item Totals' and 'Displaying 1 - 3 / 3'.

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

Step	Action
<p>13</p>	<p>The Award Line Item Detail screen <i>Administration</i> view tab will appear:</p>  <p>➤ Enter any Cost changes (only if lower if necessary)</p> <p>➤ Select the Contract Type (i.e. Left blank for training)</p>
<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Cost can only be changed from the PR to Award if it's lower than what's been committed.</i> ✓ <i>Any cost above what was committed will need another PR with the additional funds in order to obligate the full costs.</i> ✓ <i>Any changes to cost the accounting will need to be looked at and possibly adjusted.</i> 	

Step	Action
13a	<p>Contract Types:</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>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</p> </div> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The Contract Type selection is based on the decision made during procurement planning. FAR part 16 can be used, as well as contacting your Contracting Officer.</i> ✓ <i>For training purposes, this will be left blank.</i>
13a1	<p>➤ Click the <i>Address</i> tab</p>

Step	Action
------	--------

13b The Award Line Item Detail screen *Address* view tab will appear:

Award Line Item Detail User: HENRIETTA TENNESSEE (HNT)
Version: 10.2 Screen ID: ALID

LINE ITEM DETAIL MENU

- TOOLS
 - Accounting
- ACTIONS
 - Create SubCLIN
- SYSTEM OPTIONS
 - Line Items
 - Summary
- OTHER SYSTEMS

Administration | **Address** | Option | Pricing Arrangements | Receiving * = Required Field

* Delivery Date:

* Deliver To:

NOAA/CI/OISMO/ADS/FINANCE SYS ADMIN BRANCH
20020 CENTURY BLVD
GERMANTOWN MD 20879

* Supplemental Address Information(Name/Room #):

You have characters remaining for your input.

FOB:

- Verify the information change anything necessary
- Click *Apply* (if changes were made)
- Click the *Accounting* menu option

14 The Award Line Item Management screen appears:

Award Line Item Account Code Management User: HENRIETTA TENNESSEE (HNT)
Version: 10.2 Screen ID: AAC

ACCOUNT CODE MENU

- ACTIONS
 - Create
 - Edit
 - Delete
- SYSTEM OPTIONS
 - Summary
 - Line Items
- OTHER SYSTEMS

Line Item No.: 0001, Model A2910 VHF radio transmitter for Antarctic fur seals

NOTE: Tx dimensions & mass should be no m...

Search Criteria [Reset all Search Fields](#)

Search Criteria

Line Item Total: 4645.50 Total Cost: \$4,645.50 Total Percent: 100% Total Quantity: 30.00

Result Sorted By: Account Code

Displaying 1 - 1 / 1

Mark	Account Code	Cost	Quantity	Percent	BOC
<input type="checkbox"/>	142128LEF28800001022116001302100020000000026192535000000	\$4,645.50	30.00	100	

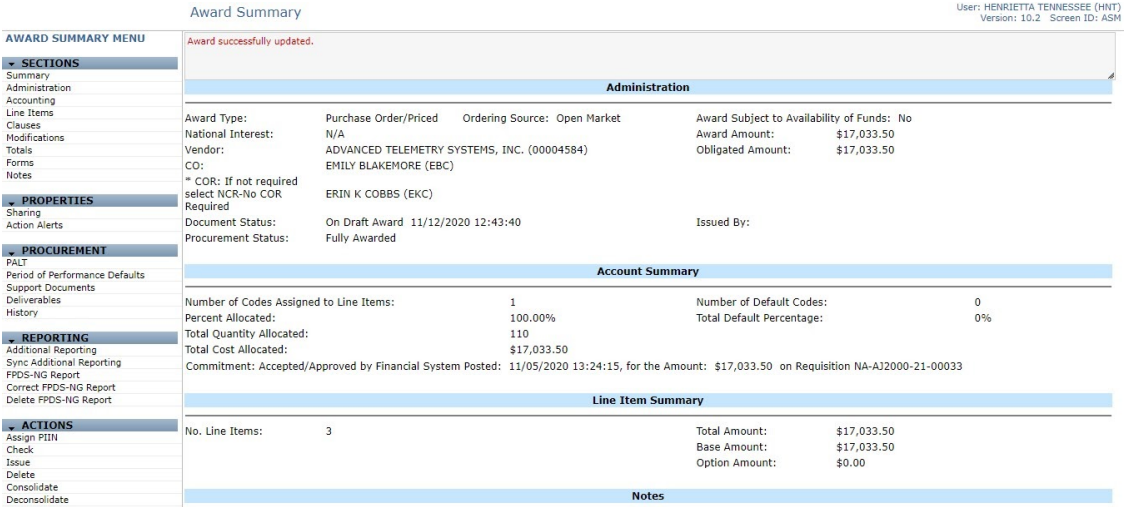
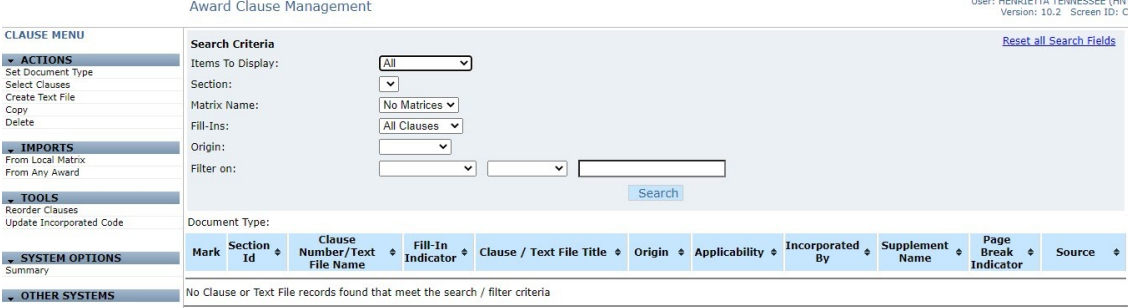
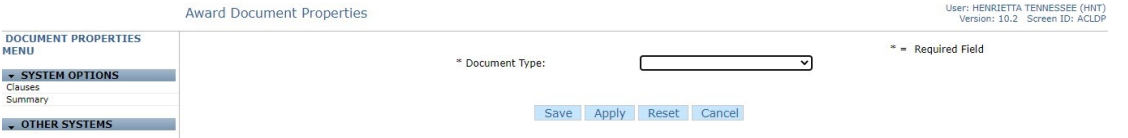
Displaying 1 - 1 / 1

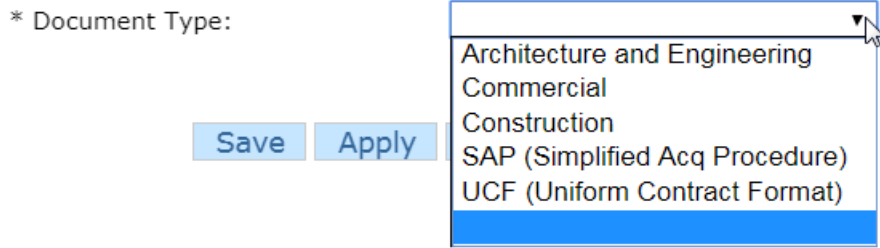
The account codes associated with the line you're reviewing appear.

Notes:

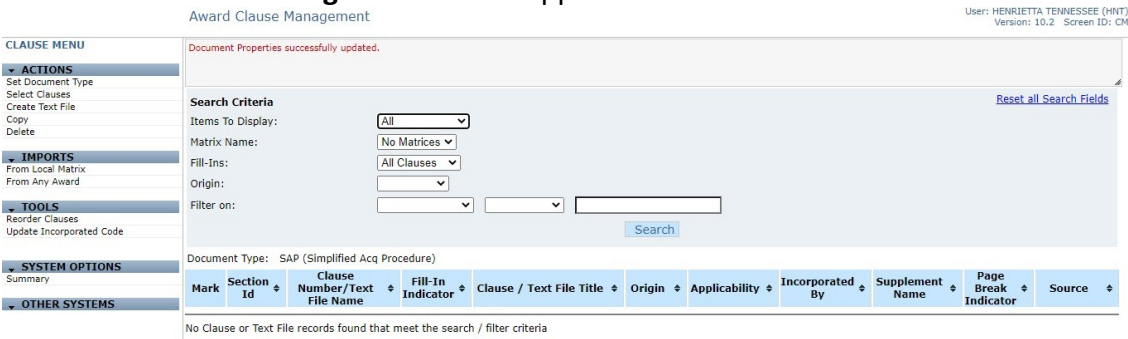
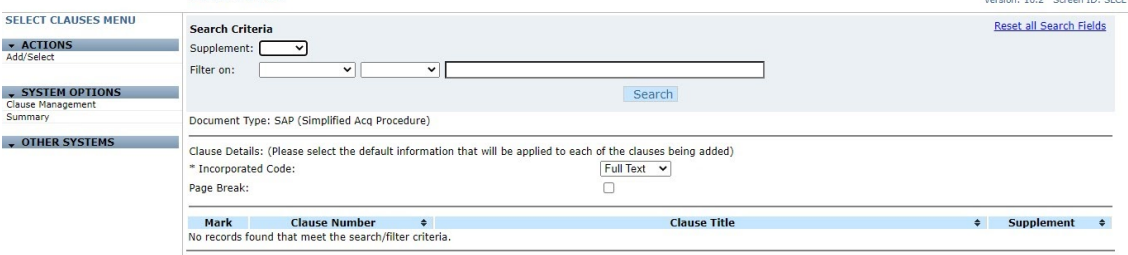
- ✓ If the accounting was set to percentage, then if costs are changing on the line there should be no changes necessary to the accounting as it will be automatically updated.
- ✓ If the accounting was set up as cost or quantity, then the accounting line will have to be changed to reflect the new cost.
- ✓ Any changes to the actual accounting string (ACCS) cannot be changed in C.Award, they must be sent back to the originating office to be changed.



Step	Action																																				
<p>14a</p>	<p>To view the sections of the accounting, click on the <i>Account Code</i>:</p> <div data-bbox="300 367 1421 808" style="border: 1px solid gray; padding: 5px;"> <p style="text-align: right;">User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: AACD</p> <p style="text-align: center;">Account Code Detail</p> <hr/> <p>ACCOUNT CODE DETAIL MENU</p> <ul style="list-style-type: none"> SYSTEM OPTIONS <ul style="list-style-type: none"> Accounting Summary Line Items OTHER SYSTEMS <p>Line Item No.: 0001, Model A2910 VHF radio transmitter for Antarctic fur seals</p> <p>NOTE: Tx dimensions & mass should be no m... * = Required Field</p> <p>Bureau Code (2): 14 Import Entire Account Code</p> <p>Fiscal Year (2): 21 P</p> <p>Project (7): 28LEF28 P</p> <p>Task (3): 800 P</p> <p>Fund (4): 0001 P</p> <p>Program (9): 022116001 P</p> <p>Organization (16): 3021000200000000 P</p> <p>Object Class (8): 26192535 P</p> <p>User Defined (6): 000000 P</p> <p>Allocation By: Cost</p> <p>Percent: 100 Cost: 4645.5 Quantity: 30</p> <p>Commit Amount: <input type="text" value="4645.5"/> Committed Amount: 4,645.50</p> </div> <p>The screen displays the individual sections as well as how it was allocated: percent, cost or quantity.</p> <ul style="list-style-type: none"> ➤ When you are finished reviewing, click the <i>Line Items</i> menu option 																																				
<p>15</p>	<p>The Award Line Item Management screen appears:</p> <div data-bbox="300 1102 1421 1459" style="border: 1px solid gray; padding: 5px;"> <p style="text-align: right;">User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: ALIM</p> <p style="text-align: center;">Award Line Item Management</p> <hr/> <p>LINE ITEM MENU</p> <ul style="list-style-type: none"> ACTIONS <ul style="list-style-type: none"> Create CLIN Create SubCLIN Copy Delete TOOLS <ul style="list-style-type: none"> Global Replace Renumber Single Renumber Range Period of Performance IMPORTS <ul style="list-style-type: none"> From Any Document SYSTEM OPTIONS OTHER SYSTEMS <p>Search Criteria Reset all Search Fields</p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/></p> <p style="text-align: center;"><input type="button" value="Search"/></p> <p>Result Sorted By: Line Item No.</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p style="text-align: right;">Displaying 1 - 3 / 3</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Mark</th> <th>LI #</th> <th>Description</th> <th>Qty</th> <th>UI</th> <th>Cost \$</th> <th>Option</th> <th>Pricing</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0001</td> <td>Model A2910 VHF radio transmitter for Antarctic fur seals NOTE: Tx dimensions &...</td> <td>30.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0002</td> <td>Model A2910; Chinstrap Penguin glue on VHF transmitter, 165.000-165.999 kHz, 12g...</td> <td>40.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0003</td> <td>Model A2910; Adelle Penguin glue on VHF transmitter, 164.000-164.999 kHz, 12g...</td> <td>40.00</td> <td>EA</td> <td>154.85</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> </tbody> </table> <p style="text-align: right;">Displaying 1 - 3 / 3</p> </div> <ul style="list-style-type: none"> ➤ Review the rest of the line items and accounting for each ➤ When you are finished, click the <i>Summary</i> menu option 	Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Status	<input type="checkbox"/>	0001	Model A2910 VHF radio transmitter for Antarctic fur seals NOTE: Tx dimensions &...	30.00	EA	154.85	N/A	N/A	Fully Awarded	<input type="checkbox"/>	0002	Model A2910; Chinstrap Penguin glue on VHF transmitter, 165.000-165.999 kHz, 12g...	40.00	EA	154.85	N/A	N/A	Fully Awarded	<input type="checkbox"/>	0003	Model A2910; Adelle Penguin glue on VHF transmitter, 164.000-164.999 kHz, 12g...	40.00	EA	154.85	N/A	N/A	Fully Awarded
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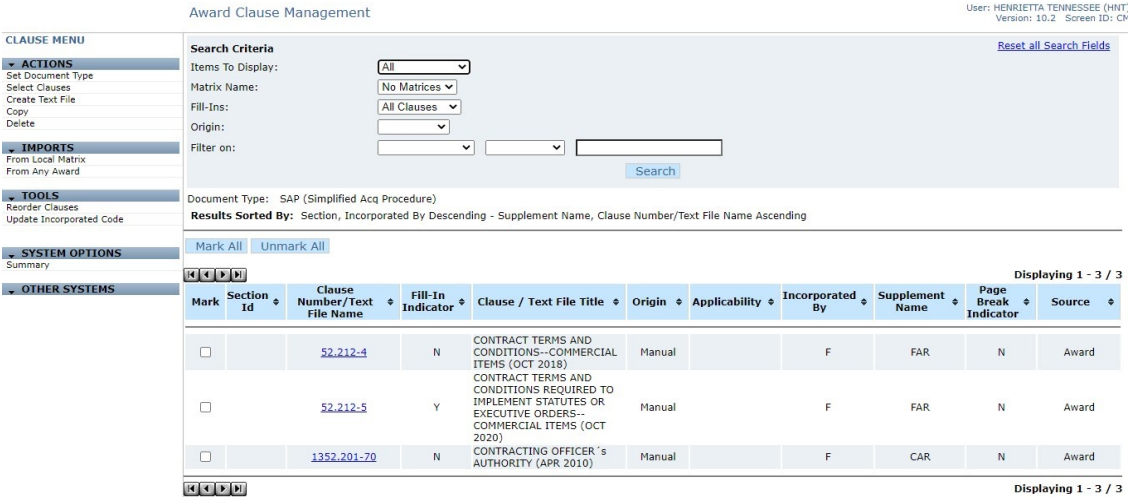
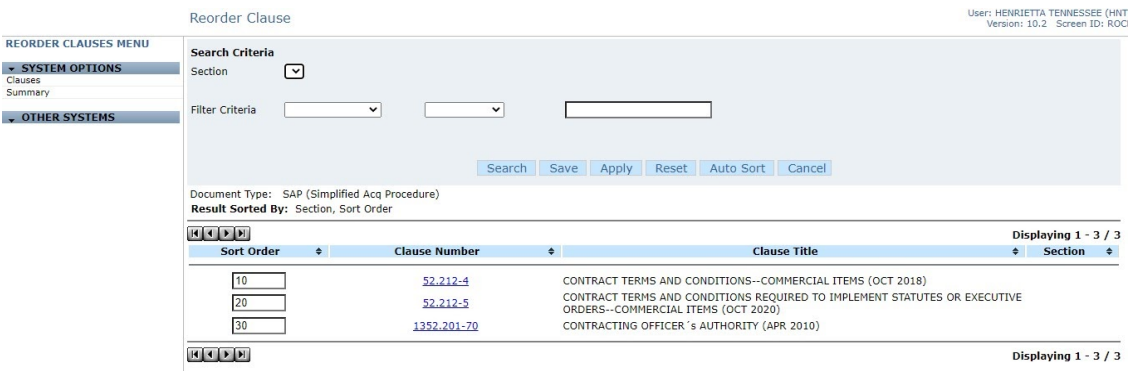
Step	Action
<p>16</p>	<p>The Award Summary screen appears:</p>  <p>➤ Click the <i>Clauses</i> menu option</p>
<p>17</p>	<p>The Award Clause Management screen appears:</p>  <p>➤ Click the <i>Set Document Type</i> menu option</p>
<p>18</p>	<p>The Award Document Properties screen appears:</p> 

Step	Action											
19	<p>Select the Document Type from the drop-down listing (i.e. SAP):</p> <p>* Document Type:</p>  <p>➤ Click <i>Save</i></p>											
19a	<table border="1"> <thead> <tr> <th data-bbox="285 751 667 856">Document Type</th> <th data-bbox="667 751 1453 856">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="285 856 667 1050"><i>Architecture and Engineering</i></td> <td data-bbox="667 856 1453 1050">This type uses a special solicitation for requests from bidders and information unique to these types of contracts. The form and format are significantly different from a standard UCF format for a general contract.</td> </tr> <tr> <td data-bbox="285 1050 667 1178"><i>Commercial</i></td> <td data-bbox="667 1050 1453 1178">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 data-bbox="285 1178 667 1306"><i>Construction</i></td> <td data-bbox="667 1178 1453 1306">This type is structured to deal with the unique nature of construction contracts.</td> </tr> <tr> <td data-bbox="285 1306 667 1432"><i>SAP (Simplified Acq Procedure)</i></td> <td data-bbox="667 1306 1453 1432">This type is used for purchases under simplified acquisition procedures FAR Part 13. An SF-18 is selected when processing these.</td> </tr> </tbody> </table>	Document Type	Description	<i>Architecture and Engineering</i>	This type uses a special solicitation for requests from bidders and information unique to these types of contracts. The form and format are significantly different from a standard UCF format for a general contract.	<i>Commercial</i>	This type is not structured like the UCF is and is simpler in its style and of course the types of clauses used.	<i>Construction</i>	This type is structured to deal with the unique nature of construction contracts.	<i>SAP (Simplified Acq Procedure)</i>	This type is used for purchases under simplified acquisition procedures FAR Part 13. An SF-18 is selected when processing these.	
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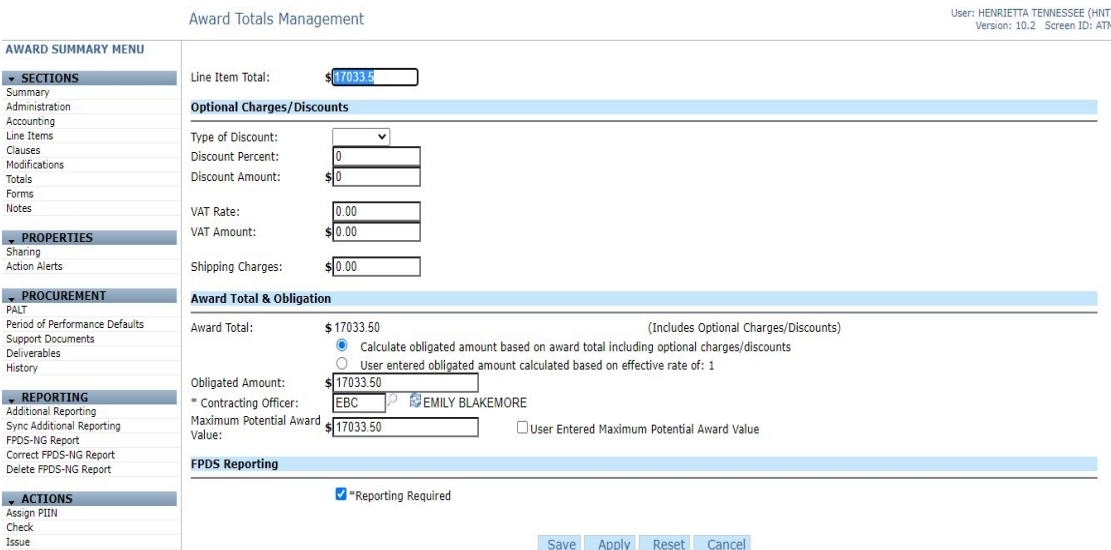
Step	Action	
	<p><i>UCF (Uniform Contract Format)</i></p>	<p>The use of a uniform contract format (UCF) facilitates preparation of the solicitation and contract as well as reference to, and use of, those documents by offerors, contractors, and contract administrators. The UCF does not have to be used for:</p> <ul style="list-style-type: none"> • 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
<p>19b</p>	<p>A pop up window appears after saving.</p> <div data-bbox="300 877 868 1138" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>crequesttrain.eas.commerce.gov says</p> <p>Changing the document type of this document will cause all existing clauses and text files to be deleted from this document. Press 'Ok' to save changes. Press 'Cancel' to continue without saving changes.</p> <div style="text-align: right;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div> </div> <p>➤ Click <i>OK</i></p> <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Document types must be set up prior to adding clauses.</i> ✓ <i>If one is selected and clauses added and then the document type changes all clauses will be lost and have to be added again.</i> </div>	

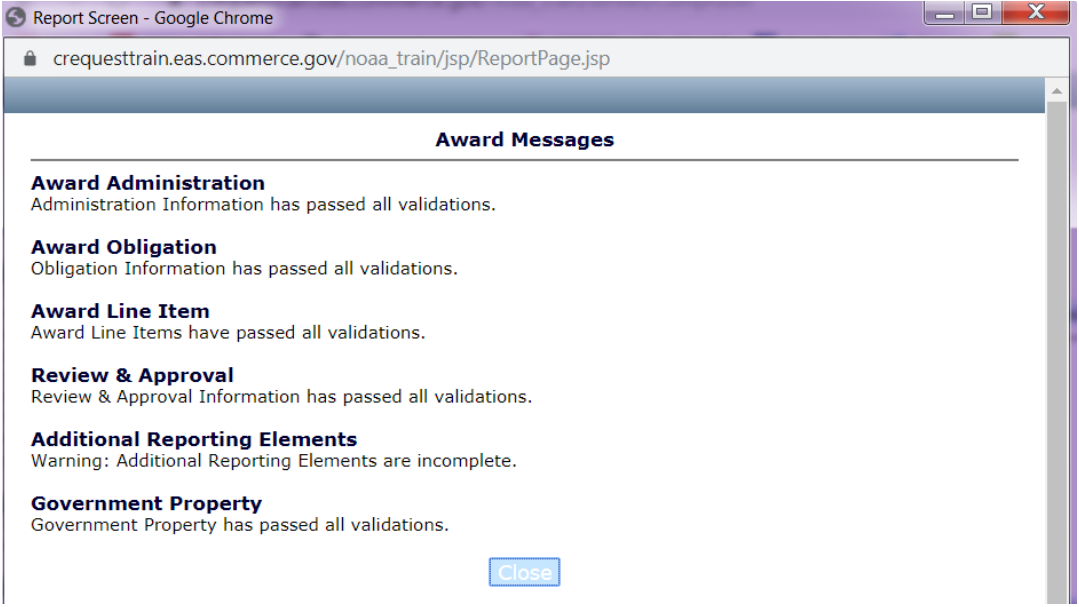
Step	Action
<p>20</p>	<p>The Award Clause Management screen appears:</p>  <p>Click the <i>Select Clauses</i> menu option</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ When creating an award without a solicitation it will not have any clauses ✓ When creating an award from a solicitation, only those clauses that are also deemed to be on the award as well will show. Others will still need to be added.
<p>21</p>	<p>The Select Clauses screen appears:</p>  <ul style="list-style-type: none"> ➤ Select the Supplement (i.e. FAR) ➤ Select Filter Criteria field #1 Clause Number ➤ Enter the Clause # in Filter Criteria field #3 (i.e. 52.212-4) ➤ Click <i>Search</i>

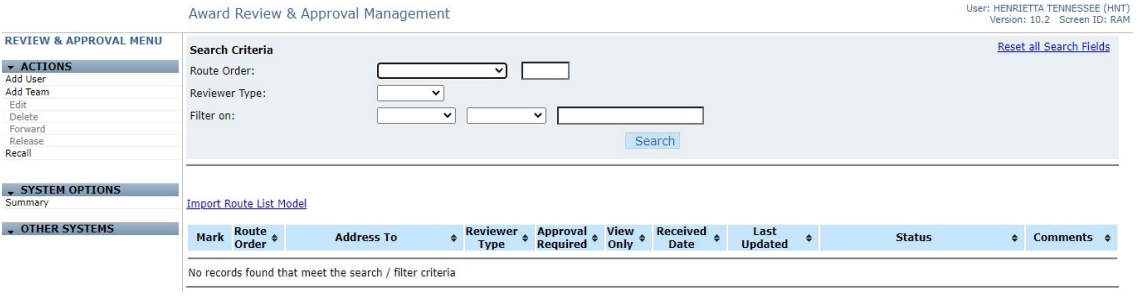
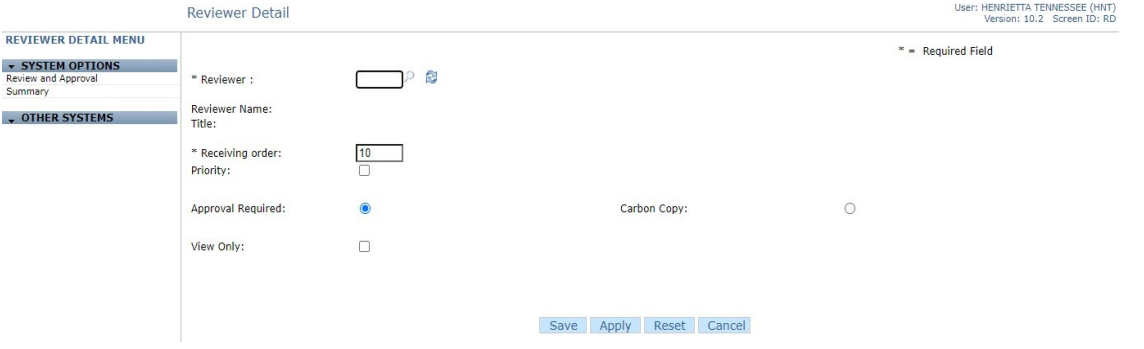
Step	Action
21a	<p>The Select Clauses screen will appear with results:</p>  <p>➤ Check the box of the clause you wish to choose (i.e. 52.212-4)</p> <p>➤ Click the <i>Add/Select</i> menu option.</p>
21b	<p>The following message will appear at the top of the screen:</p>  <p>➤ Using the process above enter the rest of the clauses:</p> <ul style="list-style-type: none"> ✓ 1352.201-70 CAR ✓ 52.212-5 FAR <p>➤ When you are finished, click <i>Clause Management</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The clause matrix from the FAR 52.301 can be found here: https://www.acquisition.gov/far/current/html/52_301Matrix.html</i>

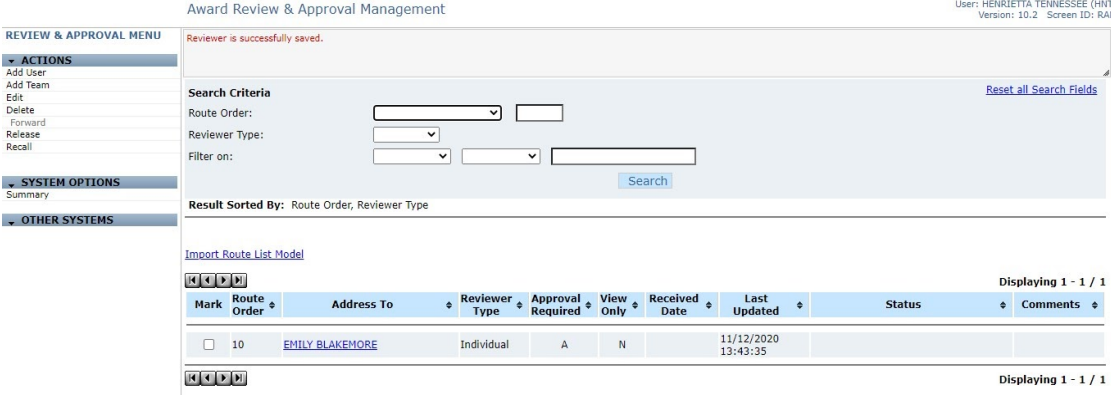
Step	Action
<p>21c</p>	<p>The Award Clause Management screen appears with the clauses added:</p>  <p>If the clauses are not in the order you entered them, you can reorder them. You do this by clicking on <i>Reorder Clauses</i> menu option.</p>
<p>22</p>	<p>The Reorder Clause screen appears with the clauses listed:</p>  <p>Using the multiples of 10 – change the order so that the following clauses are listed in this order:</p> <ul style="list-style-type: none"> ✓ 52.212-4 ✓ 1352.201-70 ✓ 52.212-5

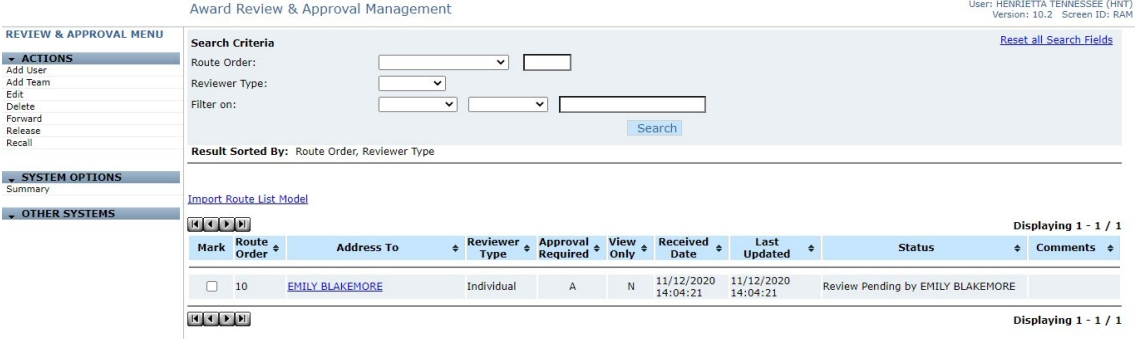
Step	Action																																												
22a	<p>Reorder Clause User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: ROCL</p> <p>REORDER CLAUSES MENU</p> <ul style="list-style-type: none"> ▼ SYSTEM OPTIONS <ul style="list-style-type: none"> Clauses Summary ▼ OTHER SYSTEMS <p>Search Criteria</p> <p>Section <input type="checkbox"/></p> <p>Filter Criteria <input type="text"/> <input type="text"/> <input type="text"/></p> <p style="text-align: center;"> <input type="button" value="Search"/> <input type="button" value="Save"/> <input type="button" value="Apply"/> <input type="button" value="Reset"/> <input type="button" value="Auto Sort"/> <input type="button" value="Cancel"/> </p> <p>Document Type: SAP (Simplified Acq Procedure) Result Sorted By: Section, Sort Order</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 10%;">Sort Order</th> <th style="width: 20%;">Clause Number</th> <th style="width: 70%;">Clause Title</th> </tr> </thead> <tbody> <tr> <td><input type="text" value="10"/></td> <td>52.212-4</td> <td>CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)</td> </tr> <tr> <td><input type="text" value="20"/></td> <td>1352.201-70</td> <td>CONTRACTING OFFICER 's AUTHORITY (APR 2010)</td> </tr> <tr> <td><input type="text" value="30"/></td> <td>52.212-5</td> <td>CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS--COMMERCIAL ITEMS (OCT 2020)</td> </tr> </tbody> </table> <p style="text-align: right;">Displaying 1 - 3 / 3</p> <p>➤ When you are finished reordering, click <i>Save</i></p>	Sort Order	Clause Number	Clause Title	<input type="text" value="10"/>	52.212-4	CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)	<input type="text" value="20"/>	1352.201-70	CONTRACTING OFFICER 's AUTHORITY (APR 2010)	<input type="text" value="30"/>	52.212-5	CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS--COMMERCIAL ITEMS (OCT 2020)																																
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22b	<p>Award Clause Management User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: CM</p> <p>Items successfully reordered.</p> <p>CLAUSE MENU</p> <ul style="list-style-type: none"> ▼ ACTIONS <ul style="list-style-type: none"> Set Document Type Select Clauses Create Text File Copy Delete ▼ IMPORTS <ul style="list-style-type: none"> From Local Matrix From Any Award ▼ TOOLS <ul style="list-style-type: none"> Reorder Clauses Update Incorporated Code ▼ SYSTEM OPTIONS <ul style="list-style-type: none"> Summary ▼ OTHER SYSTEMS <p>Search Criteria</p> <p>Items To Display: <input type="text" value="All"/> Reset all Search Fields</p> <p>Matrix Name: <input type="text" value="No Matrices"/></p> <p>Fill-Ins: <input type="text" value="All Clauses"/></p> <p>Origin: <input type="text" value=""/></p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/></p> <p style="text-align: center;"><input type="button" value="Search"/></p> <p>Document Type: SAP (Simplified Acq Procedure) Results Sorted By: Section, Incorporated By Descending - Supplement Name, Clause Number/Text File Name Ascending</p> <p style="text-align: center;"> <input type="button" value="Mark All"/> <input type="button" value="Unmark All"/> </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <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>Origin</th> <th>Applicability</th> <th>Incorporated By</th> <th>Supplement Name</th> <th>Page Break Indicator</th> <th>Source</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>52.212-4</td> <td>N</td> <td>CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Award</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>1352.201-70</td> <td>N</td> <td>CONTRACTING OFFICER 's AUTHORITY (APR 2010)</td> <td>Manual</td> <td></td> <td>F</td> <td>CAR</td> <td>N</td> <td>Award</td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> <td>52.212-5</td> <td>Y</td> <td>CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS-- COMMERCIAL ITEMS (OCT 2020)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Award</td> </tr> </tbody> </table> <p style="text-align: right;">Displaying 1 - 3 / 3</p> <p>➤ Click the <i>Summary</i> menu option</p>	Mark	Section Id	Clause Number/Text File Name	Fill-In Indicator	Clause / Text File Title	Origin	Applicability	Incorporated By	Supplement Name	Page Break Indicator	Source	<input type="checkbox"/>		52.212-4	N	CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)	Manual		F	FAR	N	Award	<input type="checkbox"/>		1352.201-70	N	CONTRACTING OFFICER 's AUTHORITY (APR 2010)	Manual		F	CAR	N	Award	<input type="checkbox"/>		52.212-5	Y	CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS-- COMMERCIAL ITEMS (OCT 2020)	Manual		F	FAR	N	Award
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Step	Action
<p>23</p>	<p>The Award Summary screen appears:</p>  <p>➤ Click the <i>Totals</i> menu option</p>
<p>24</p>	<p>The Award Totals Management screen appears:</p>  <p>➤ Validate the Award Totals</p> <p>➤ Uncheck the FPDS Reporting (for training purposes)</p> <p>➤ Click <i>Save</i></p> <p>➤ Click the <i>Check</i> menu option</p>

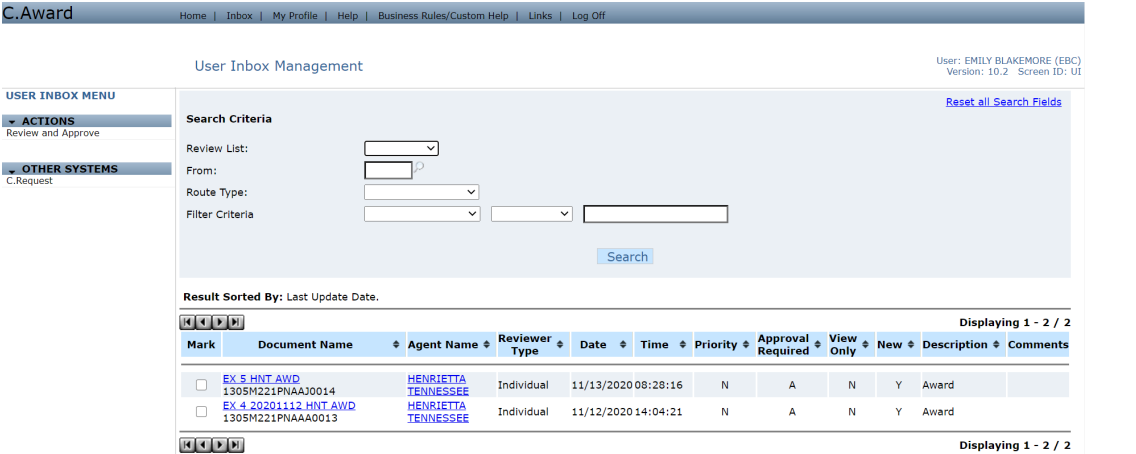
Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ FPDS Reporting is mandatory in production and you will not see this field. ✓ Users are not to ever use the optional charges/discounts area of the Award Totals Management screen. Entering any information in this area, will cause issues on close out process when dealing with the Core Financial System (CFS).
<p>25</p>	<p>A pop-up window appears:</p>  <p>➤ Look for errors. If there are none, continue</p> <p>➤ Click <i>Close</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ This screen will not show CFS obligation errors, only C.Suite errors. ✓ This process is good to perform prior to doing FPDS reporting. It helps to minimize the need to delete the FPDS report to fix errors. ✓ This screenshot only provides an example of something that might need to be fixed before continuing the process. ✓ We are skipping FPDS for training purposes.
<p>26</p>	<p>The next step is to set up the routing list. To do that, click the <i>Manage Reviewers/Approvers</i> menu option</p>

Step	Action
<p>27</p>	<p>The Award Review & Approval Management screen appears. It is here you will set the routing to process your document.</p>  <p>➤ Click the <i>Add User</i> menu option</p>
<p>27a</p>	<p>The Reviewer Detail screen appears. It is here you will enter the information pertaining to the routing for this award.</p>  <p>➤ Enter the Reviewer Code (i.e. EBC)</p> <p>➤ Leave the Receiving Order the number it is</p> <p>➤ Make sure the Approval Required radio button is selected</p> <p>➤ Click <i>Save</i></p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>If entering the code, be sure to click the Refresh Icon to make sure you have the correct person entered in the field.</i> ✓ <i>Must be in Capitals if typing</i> ✓ <i>The system automatically creates each "receiving order" number in increments of 10.</i> ✓ <i>Usually the approver is the Contracting Officer.</i>

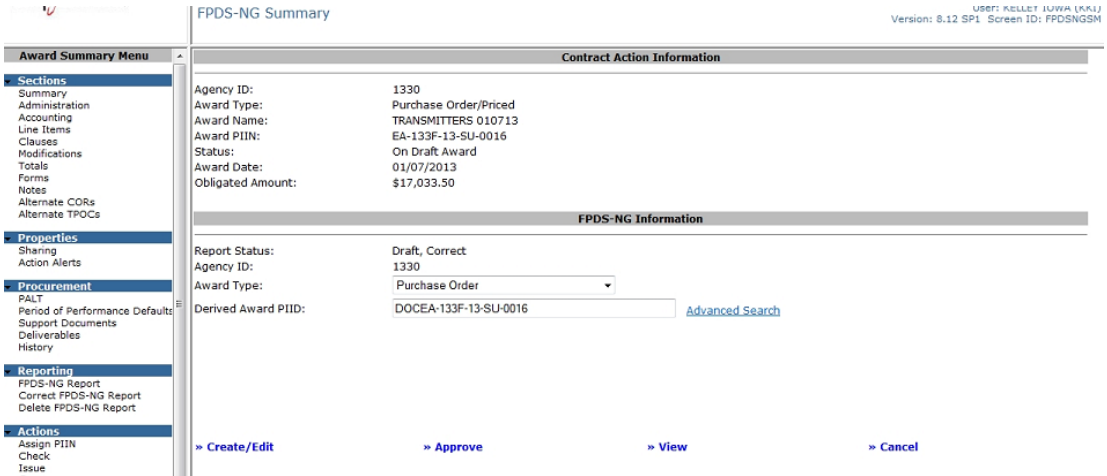
Step	Action
<p>27b</p>	<p>The Requisition Review & Approval Management screen appears with the approver showing.</p>  <p>➤ Click the <i>Release</i> menu option</p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Code under Approval Requested:</i> <ul style="list-style-type: none"> A = Approval Required C = Carbon Copy ✓ <i>Codes under View Only:</i> <ul style="list-style-type: none"> Y = Yes, Read Only Access N = No, Full Read/Write Access ✓ <i>In order for the requisition to be sent to the people listed, Release must be clicked.</i>

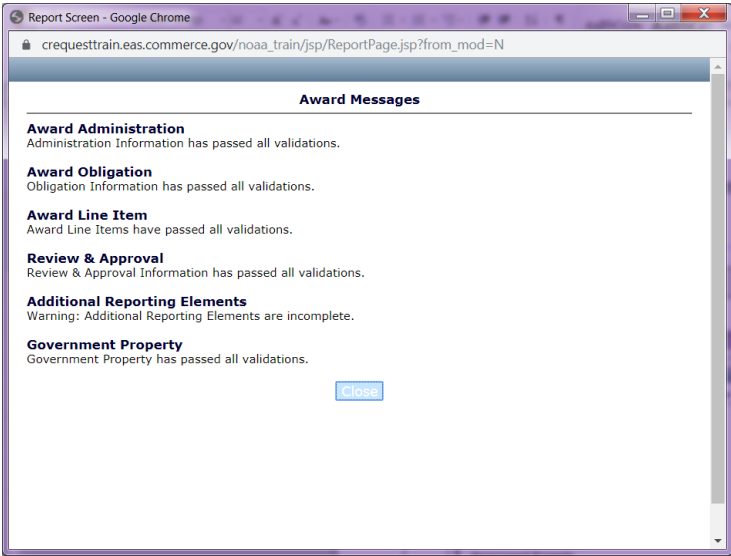
Step	Action
27d	<p>The Requisition Review & Approval Management screen displays the date/time and status of the review.</p>  <p>At this point, following the flow chart, your approver must complete the process.</p> <ul style="list-style-type: none"> ➤ Click Home from the <i>Standard Menu Bar</i>

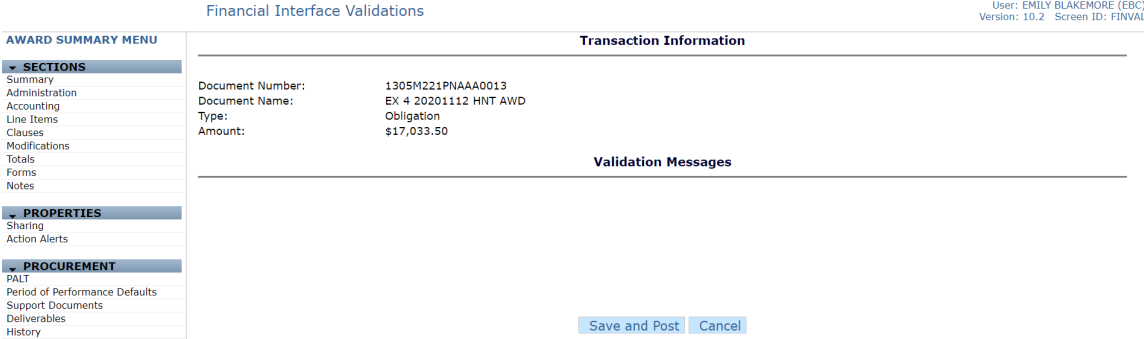
DEMONSTRATION OF APPROVAL PROCESS BY CONTRACTING OFFICER

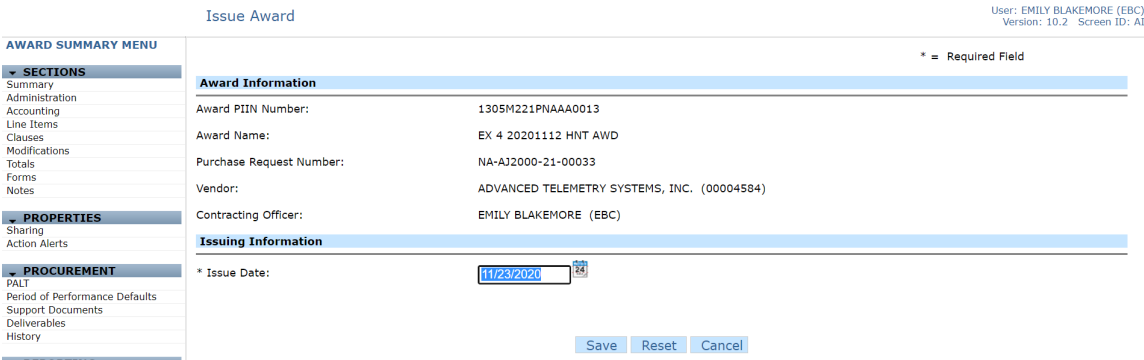
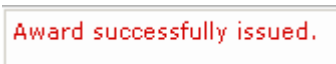
D1	<p>The approver, if profile had it enabled, is emailed letting them know they have a document to approve. Otherwise, they will need to log into the system and from the Home screen do the following:</p> <ul style="list-style-type: none"> ➤ Click Inbox from the <i>Standard Menu Bar</i>  <p>The User Inbox Management screen appears with all documents awaiting approval.</p> <ul style="list-style-type: none"> ➤ Click the <i>Document Name</i>
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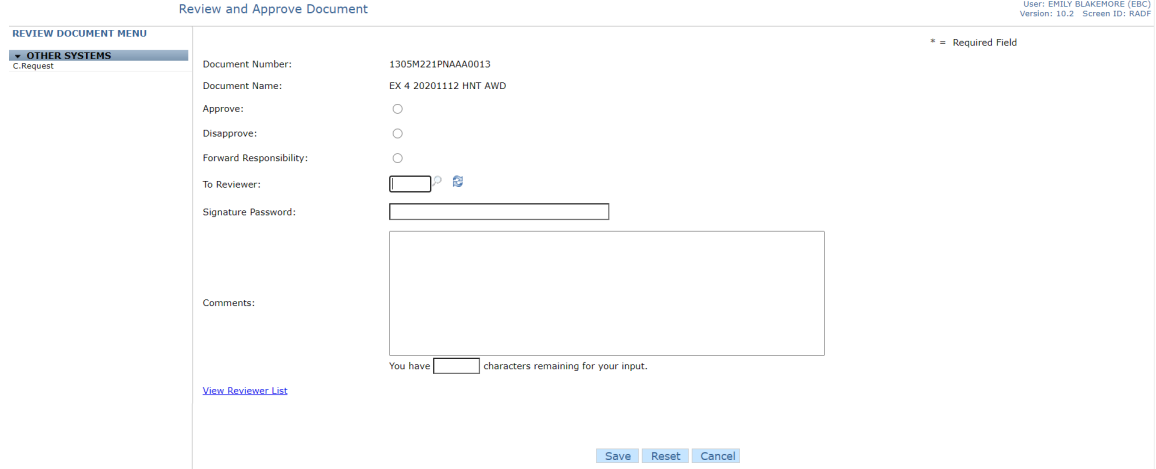
Step	Action																																																																																																																																																				
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ Review and Approve should not be used without reviewing the document first. ✓ All areas of the document should be reviewed before obligated and approving. ✓ Once the document is approved it will no longer be accessible. 																																																																																																																																																				
<p>D2</p>	<p>The Award Summary screen appears.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: right; font-size: small;">User: EMILY BLAKEMORE (EBC) Version: 10.2 Screen ID: ASM</p> <p style="text-align: center;">Award Summary</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">AWARD SUMMARY MENU</th> <th colspan="3">Administration</th> </tr> </thead> <tbody> <tr> <td style="font-weight: bold;">SECTION</td> <td colspan="3"></td> </tr> <tr> <td>Summary</td> <td>Award Type: Purchase Order/Priced</td> <td>Ordering Source: Open Market</td> <td>Award Subject to Availability of Funds: No</td> </tr> <tr> <td>Administration</td> <td>National Interest: N/A</td> <td></td> <td>Award Amount: \$17,033.50</td> </tr> <tr> <td>Accounting</td> <td>Vendor: ADVANCED TELEMETRY SYSTEMS, INC. (00004584)</td> <td></td> <td>Obligated Amount: \$17,033.50</td> </tr> <tr> <td>Line Items</td> <td>CO: EMILY BLAKEMORE (EBC)</td> <td></td> <td></td> </tr> <tr> <td>Clauses</td> <td>* COR: If not required select NCR-No COR</td> <td>ERIN K COBBS (EKC)</td> <td></td> </tr> <tr> <td>Modifications</td> <td>Required</td> <td></td> <td></td> </tr> <tr> <td>Totals</td> <td>Document Status: On Draft Award 11/12/2020 13:33:01</td> <td></td> <td>Issued By:</td> </tr> <tr> <td>Forms</td> <td>Procurement Status: Fully Awarded</td> <td></td> <td></td> </tr> <tr> <td>Notes</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="font-weight: bold;">PROPERTY</td> <td colspan="3"></td> </tr> <tr> <td>Sharing</td> <td colspan="3"></td> </tr> <tr> <td>Action Alerts</td> <td colspan="3"></td> </tr> <tr> <td style="font-weight: bold;">PROCUREMENT</td> <td colspan="3"></td> </tr> <tr> <td>PALT</td> <td>Number of Codes Assigned to Line Items: 1</td> <td>Number of Default Codes: 0</td> <td></td> </tr> <tr> <td>Period of Performance Defaults</td> <td>Percent Allocated: 100.00%</td> <td>Total Default Percentage: 0%</td> <td></td> </tr> <tr> <td>Support Documents</td> <td>Total Quantity Allocated: 110</td> <td></td> <td></td> </tr> <tr> <td>Deliverables</td> <td>Total Cost Allocated: \$17,033.50</td> <td></td> <td></td> </tr> <tr> <td>History</td> <td colspan="3">Commitment: Accepted/Approved by Financial System Posted: 11/05/2020 13:24:15, for the Amount: \$17,033.50 on Requisition NA-AJ2000-21-00033</td> </tr> <tr> <td style="font-weight: bold;">REPORTING</td> <td colspan="3"></td> </tr> <tr> <td>Additional Reporting</td> <td colspan="3"></td> </tr> <tr> <td>Sync Additional Reporting</td> <td colspan="3"></td> </tr> <tr> <td>FPDS-NG Report</td> <td colspan="3"></td> </tr> <tr> <td>Correct FPDS-NG Report</td> <td colspan="3"></td> </tr> <tr> <td>Delete FPDS-NG Report</td> <td colspan="3"></td> </tr> <tr> <td style="font-weight: bold;">ACTIONS</td> <td colspan="3"></td> </tr> <tr> <td>Assign PIIN</td> <td colspan="3"></td> </tr> <tr> <td>Check</td> <td colspan="3"></td> </tr> <tr> <td>Issue</td> <td colspan="3"></td> </tr> <tr> <td>Cancel</td> <td colspan="3"></td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="4">Account Summary</th> </tr> </thead> <tbody> <tr> <td>No. Line Items:</td> <td>3</td> <td>Total Amount:</td> <td>\$17,033.50</td> </tr> <tr> <td></td> <td></td> <td>Base Amount:</td> <td>\$17,033.50</td> </tr> <tr> <td></td> <td></td> <td>Option Amount:</td> <td>\$0.00</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Line Item Summary</th> </tr> </thead> <tbody> <tr> <td>No. Line Items:</td> <td>3</td> </tr> </tbody> </table> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Notes</th> </tr> </thead> <tbody> <tr> <td colspan="2" style="text-align: center;">No Notes</td> </tr> </tbody> </table> <p>The approver should review the administration, line items, accounting, clauses, and support documents prior to doing anything. If there is a paper copy, they should verify it has the same information. Once they have decided everything looks all right, they should:</p> <ul style="list-style-type: none"> ➤ Click the <i>FPDS-NG Report</i> menu option </div>	AWARD SUMMARY MENU	Administration			SECTION				Summary	Award Type: Purchase Order/Priced	Ordering Source: Open Market	Award Subject to Availability of Funds: No	Administration	National Interest: N/A		Award Amount: \$17,033.50	Accounting	Vendor: ADVANCED TELEMETRY SYSTEMS, INC. (00004584)		Obligated Amount: \$17,033.50	Line Items	CO: EMILY BLAKEMORE (EBC)			Clauses	* COR: If not required select NCR-No COR	ERIN K COBBS (EKC)		Modifications	Required			Totals	Document Status: On Draft Award 11/12/2020 13:33:01		Issued By:	Forms	Procurement Status: Fully Awarded			Notes				PROPERTY				Sharing				Action Alerts				PROCUREMENT				PALT	Number of Codes Assigned to Line Items: 1	Number of Default Codes: 0		Period of Performance Defaults	Percent Allocated: 100.00%	Total Default Percentage: 0%		Support Documents	Total Quantity Allocated: 110			Deliverables	Total Cost Allocated: \$17,033.50			History	Commitment: Accepted/Approved by Financial System Posted: 11/05/2020 13:24:15, for the Amount: \$17,033.50 on Requisition NA-AJ2000-21-00033			REPORTING				Additional Reporting				Sync Additional Reporting				FPDS-NG Report				Correct FPDS-NG Report				Delete FPDS-NG Report				ACTIONS				Assign PIIN				Check				Issue				Cancel				Account Summary				No. Line Items:	3	Total Amount:	\$17,033.50			Base Amount:	\$17,033.50			Option Amount:	\$0.00	Line Item Summary		No. Line Items:	3	Notes		No Notes	
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Step	Action
<p>D3</p>	<p>The FPDS-NG Summary screen appears.</p>  <p>The approver should review the report status (Draft, Correct). If anything other than Draft, Correct appears, they should disapprove the document and send it back to the Contracting Specialist. They may also choose to edit the report themselves. They should probably view the report prior to approving it, to make sure all details are correct.</p> <p>➤ Once that is done, click <i>Approve</i></p>

Step	Action
<p>D4</p>	<p>The screen refreshes with the Report Status showing Approved/Final:</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;"> <p style="text-align: right;">User: KELLEY IOWA (KK) Version: 8.12 SP1 Screen ID: FPDSNGS</p> <hr/> <p style="text-align: center;">Contract Action Information</p> <hr/> <p>Agency ID: 1330 Award Type: Purchase Order/Priced Award Name: TRANSMITTERS 010713 Award PIIN: EA-133F-13-SU-0016 Status: On Draft Award Award Date: 01/07/2013 Obligated Amount: \$17,033.50</p> <hr/> <p style="text-align: center;">FPDS-NG Information</p> <hr/> <p>Report Status: Approved/Final Agency ID: 1330 Award Type: <input type="text" value="Purchase Order"/> Derived Award PIID: <input type="text" value="DOCEA-133F-13-SU-0016"/> Advanced Search</p> <p style="text-align: center;"> » View » Cancel </p> </div> <p style="background-color: yellow; padding: 5px; margin: 10px 0;">We do not do the FPDS steps for training purposes.</p> <p>➤ Click the <i>Obligate</i> menu option</p>
<p>D5a</p>	<p>The following pop-up will appear:</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px 0;">  </div> <p>➤ Click the <i>Close</i></p>

Step	Action
D5b	<p>The Financial Interface Validation screen appears. If there are no C.Suite issues, you should get the message “The document has passed all validations.”</p>  <p>➤ Click <i>Save and Post</i></p>
D6	<p>The Award Summary screen appears with the obligation showing “Sent to Interface”.</p> <p>Obligation: Sent to Interface; Awaiting Response</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ To “refresh” the screen to see if it comes back as Approved or Rejected, click the Summary OR View Status menu option. ✓ If rejected, click on the View Status menu option and then Message
D8	<p>Once it’s approved, you will see the message under the <i>View Status</i> screen or on the Summary.</p> <p>Commitment: Accepted/Approved by Financial System Obligation: Accepted/Approved by Financial System</p>
D9	<p>Once CFS has accepted the obligation, the next step is to issue the award.</p> <p>➤ Click the <i>Issue</i> menu options</p> <p>A pop-up window will appear showing you if it has passed all validations</p> <p>➤ Click <i>Close</i></p>

Step	Action
<p>D10</p>	<p>The Issue Award screen appears:</p>  <p>In this screen, you can either accept the current system date, or change it to a future date. You cannot back date it. Once you’ve decided which date to use:</p> <ul style="list-style-type: none"> ➤ Click <i>Save</i>
<p>D11</p>	<p>The Award Summary screen appears with the following message:</p> 
<p>D12</p>	<p>The next step is to do the final approval. From the Award Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Review and Approve</i> menu option

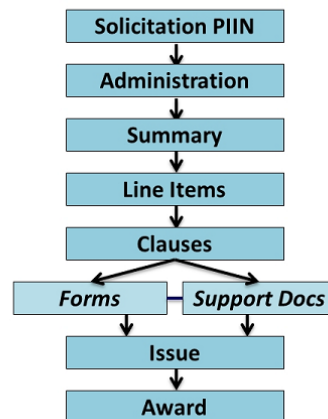
Step	Action
<p>D13</p>	<p>The Review and Approve Document screen appears:</p>  <ul style="list-style-type: none"> ➤ Check the Approve radio button ➤ Enter your Signature Password ➤ Enter any Comments ➤ Click Save <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>If as an approving official, you disapprove the document, make sure to enter comments as to why it's being disapproved.</i> ✓ <i>If as an approving official, you need someone else to review/approve, click the radio button Forward Responsibility and enter the code of the person in the To Review field.</i> ✓ <i>To view the whole routing list, click the View Reviewer List link on the screen.</i>
<p>D14</p>	<p>The User Inbox Management screen appears.</p> <p>You can either Log out of C.Suite, or click the next PR to approve.</p>

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:

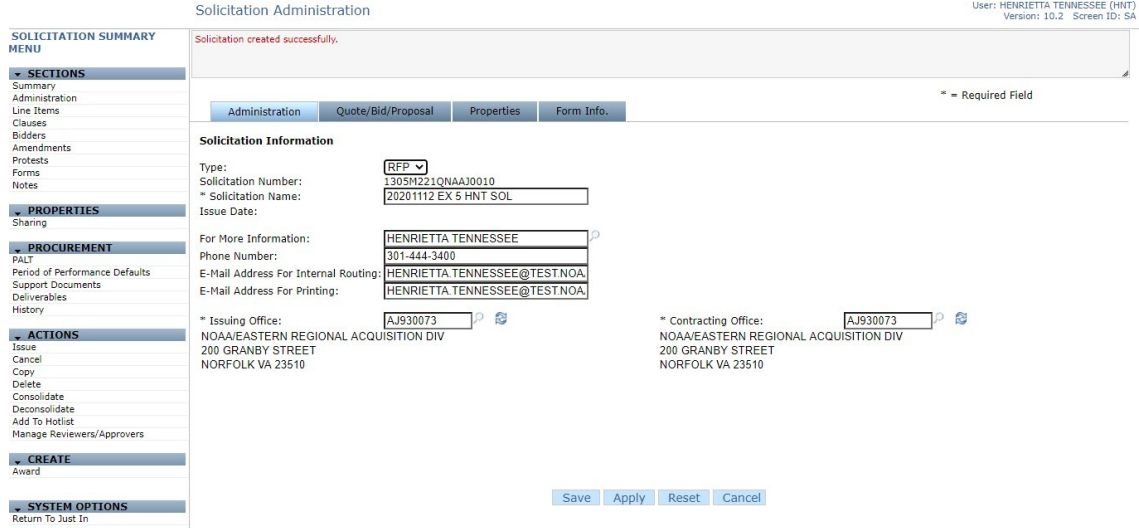


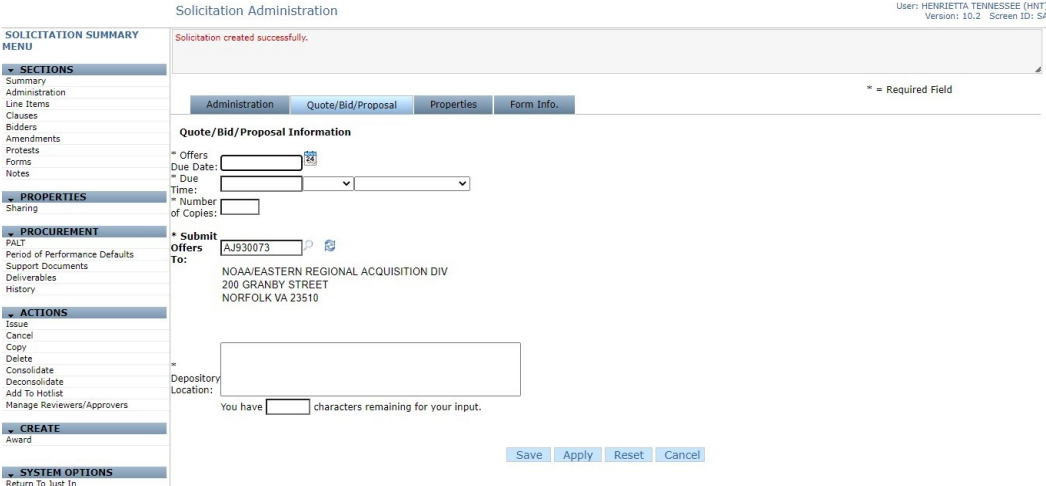
You have received a purchase request that will need a solicitation prior to creating an award.

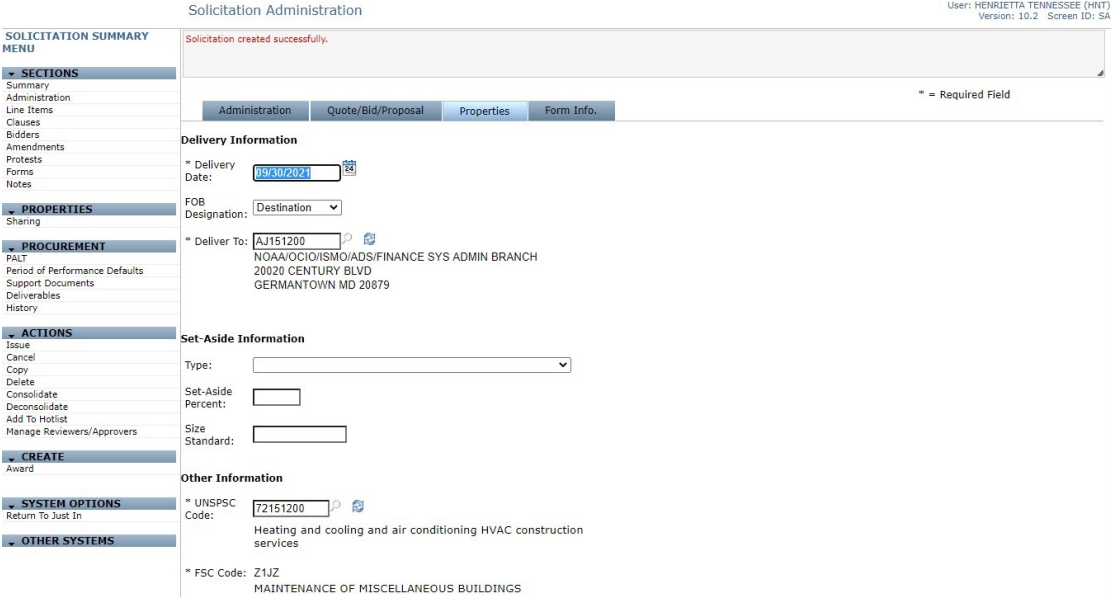
Step	Action
1	From the Home screen click the <i>Just In</i> tab. <ul style="list-style-type: none"> ➤ Click <i>PR#</i> ➤ Review the PR in its entirety ➤ If the PR looks good, then you will need to save the Support Documents if any

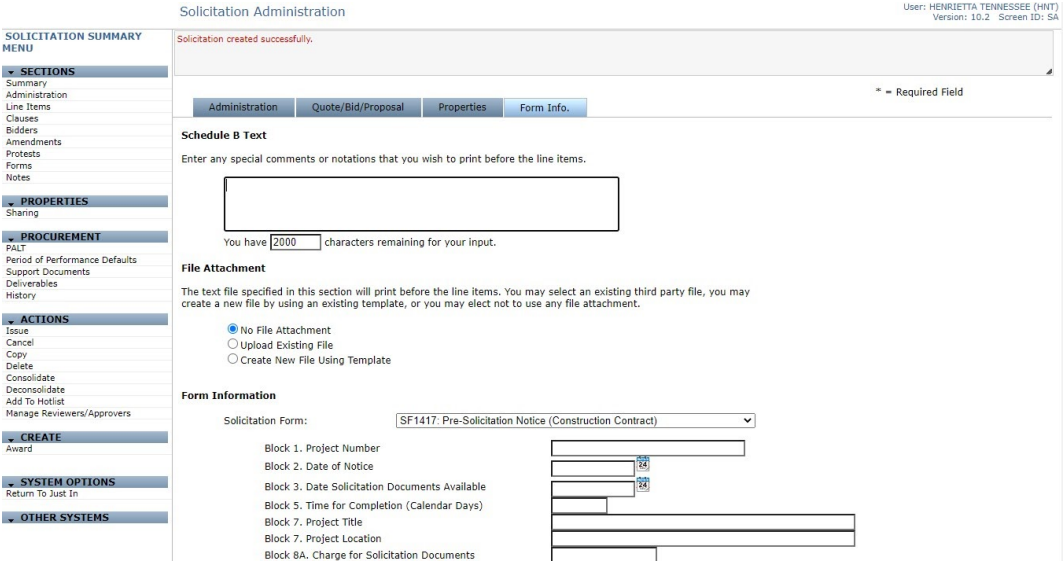
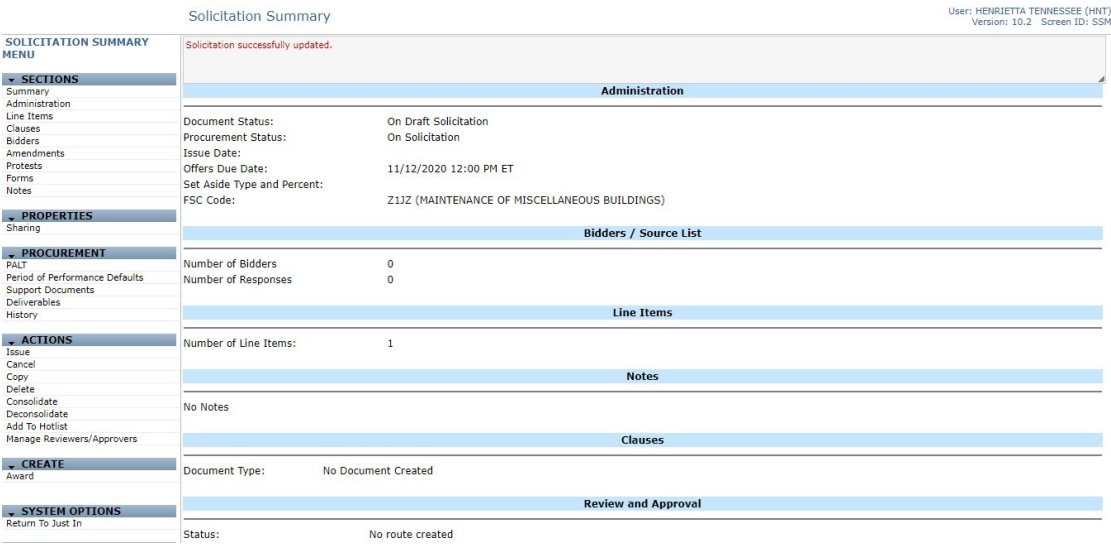
Step	Action
2	From the Purchase Request Summary screen: ➤ Click the <i>Create Solicitation</i> menu option
3	The Solicitation Request Report pop-up window will appear. <div data-bbox="300 552 1227 1228" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div> ➤ Click <i>Close</i>
4	The Solicitation PIIN and Name screen appears <div data-bbox="300 1444 1404 1816" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> </div>

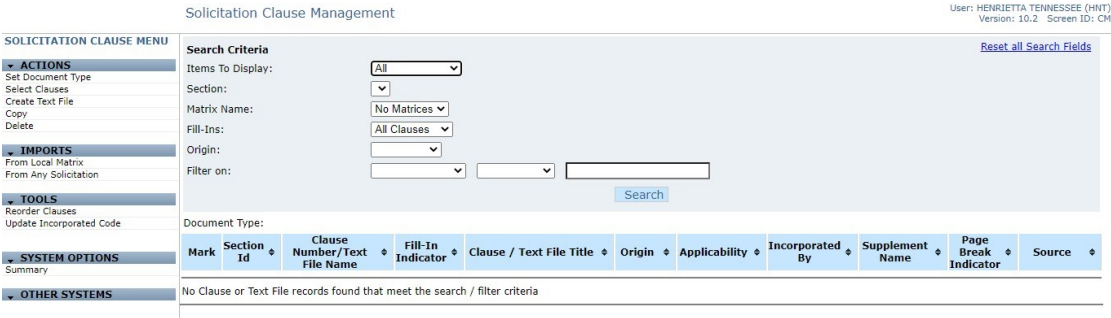
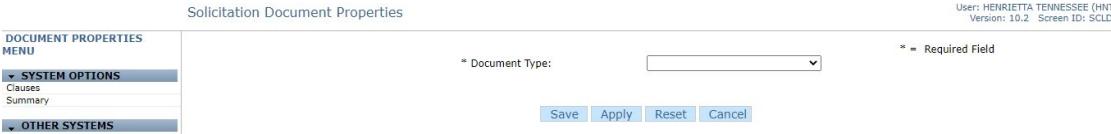
Step	Action
4a	<p>There are 5 fields for Document Number:</p> <ul style="list-style-type: none"> ➤ 1st Field - AGO Office (i.e. defaults to user's office) ➤ 2nd Field - Fiscal Year (i.e defaults to the current FY) ➤ 3rd Field – Solicitation Type (i.e defaults to the letter B) ➤ 4th Field - Line Office (i.e. Must be selected based on the LO Requisition) ➤ 5th Field - Sequential Number
4a1	<p>The Solicitation Types are:</p> <ul style="list-style-type: none"> • B – Invitation for Bids • R – Request for Proposals • Q – Request for Quotations (U if Q ends up full)
4b	<ul style="list-style-type: none"> ➤ Enter the Document Number fields (i.e.1305M2-FY-Q-####-?????) ➤ Enter the Document Name (i.e. {date} EX 5 {Training Initials} SOL) ➤ Click <i>Save</i>

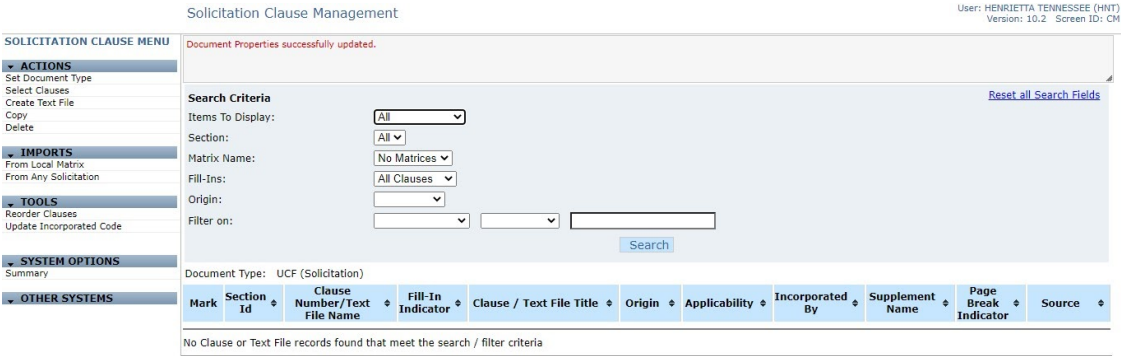
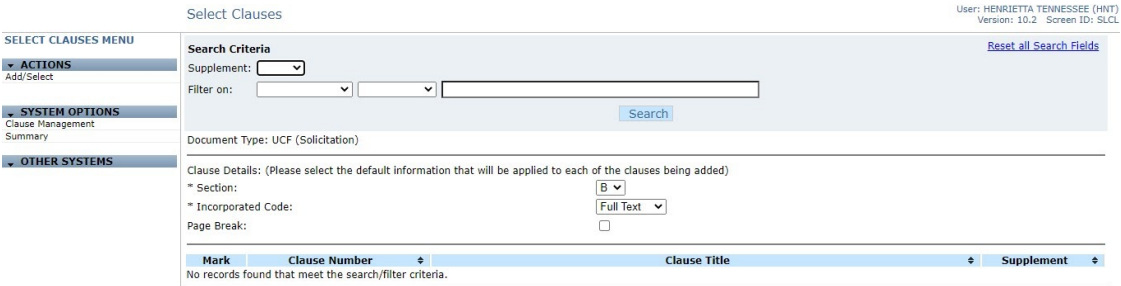
Step	Action
5	<p>The Solicitation Administration screen <i>Administration</i> tab appears:</p>  <p>Be sure the Type is RFQ</p> <p>Verify all the fields make any changes as necessary</p> <p>Click on the <i>Quote/Bid/Proposal</i> tab</p>

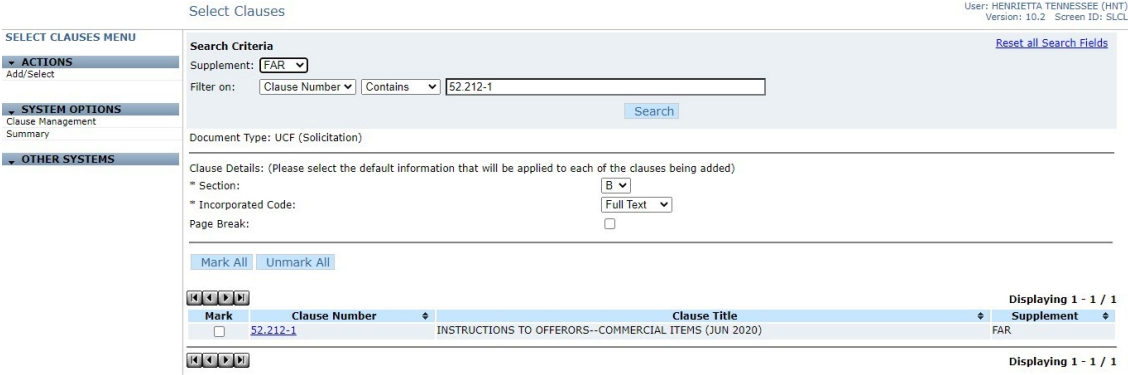
Step	Action
5a	<p>The Solicitation Administration screen <i>Quote/Bid/Proposal</i> tab appears:</p>  <p>Solicitation Administration</p> <p>Solicitation created successfully.</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: SA</p> <p>* = Required Field</p> <p>Quote/Bid/Proposal Information</p> <p>* Offers Due Date: <input type="text" value="04/24/2021"/></p> <p>* Offers Due Time: <input type="text" value="12:00 PM"/></p> <p>* Number of Copies: <input type="text" value="1"/></p> <p>* Submit Offers to: <input type="text" value="AJ930073"/></p> <p>To: NOAA/EASTERN REGIONAL ACQUISITION DIV 200 GRANBY STREET NORFOLK VA 23510</p> <p>Depository Location: <input type="text"/></p> <p>You have <input type="text" value="150"/> characters remaining for your input.</p> <p>Save Apply Reset Cancel</p> <ul style="list-style-type: none"> ➤ 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){if not already filled in} ➤ Enter the Depository Location (i.e. n/a) {this information doesn't seem to appear anywhere on the form} ➤ Click on the <i>Properties</i> tab

Step	Action
5b	<p>The Solicitation Administration screen <i>Properties</i> tab appears:</p>  <ul style="list-style-type: none"> ➤ Enter the NAICS Code (i.e. 333415) ➤ Click on the <i>Form Info.</i> tab

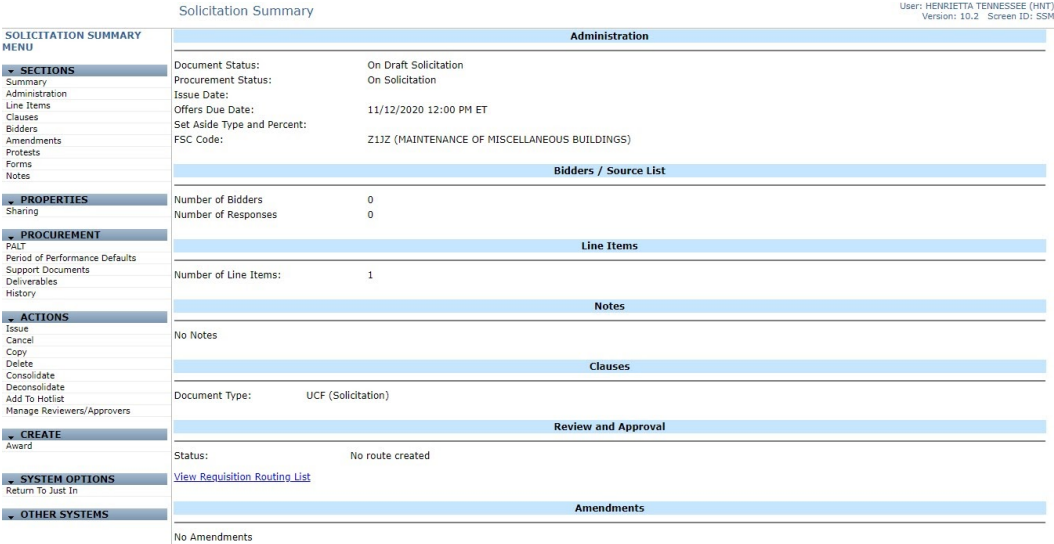
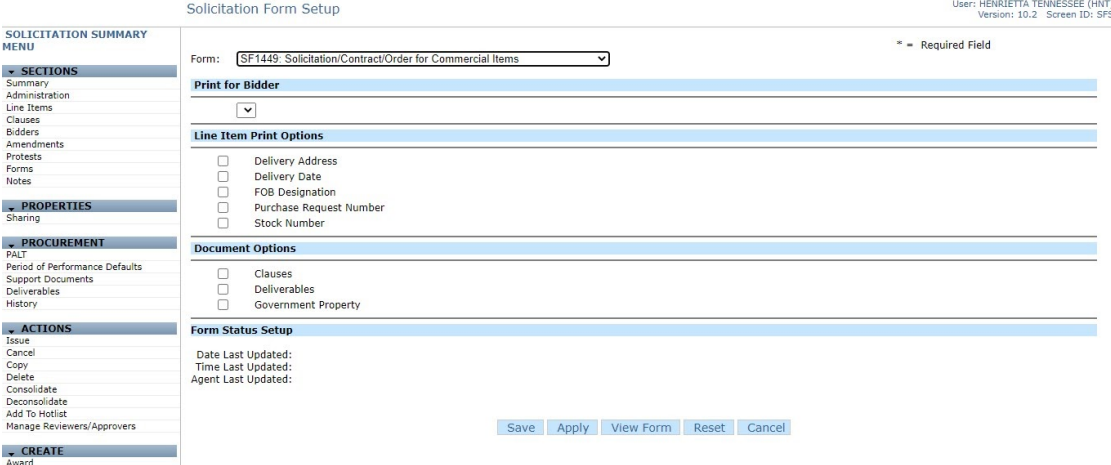
Step	Action
<p>5c</p>	<p>The Solicitation Administration screen <i>Form Info.</i> tab appears:</p>  <p>➤ Select the Solicitation Form (i.e. SF1449)</p> <p>➤ Click <i>Save</i></p>
<p>6</p>	<p>The Solicitation Summary screen appears:</p>  <p>➤ Click the <i>Line Items</i> menu option</p>


Step	Action
7	<ul style="list-style-type: none"> ➤ Search the Line Items and validate the information for each line. ➤ Click the <i>Summary</i> menu option
8	<p>The Solicitation Summary screen appears:</p> <ul style="list-style-type: none"> ➤ Click the <i>Clauses</i> menu option
9	<p>The Solicitation Clause Management screen appears:</p>  <ul style="list-style-type: none"> ➤ Click the <i>Set Document Type</i> menu option <p>Notes: Three types of solicitations require that clauses and text files 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. The information on the Uniform contract format can be found at FAR 15.204-1.</p>
9a	<p>The Solicitation Document Properties screen appears:</p>  <ul style="list-style-type: none"> ➤ Select the <i>Document Type</i> from the drop-down listing (e.g. UCF) ➤ Click <i>Save</i> ➤ Click OK to prompt

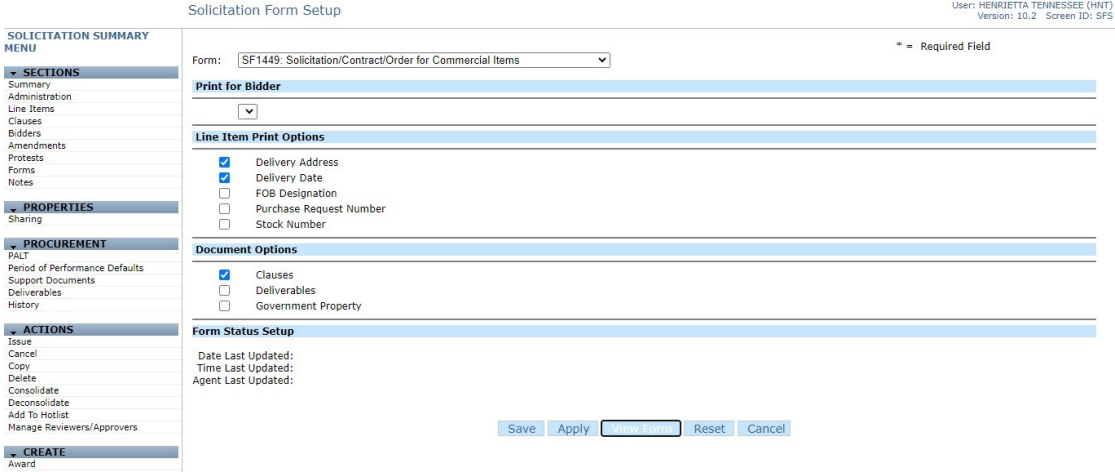
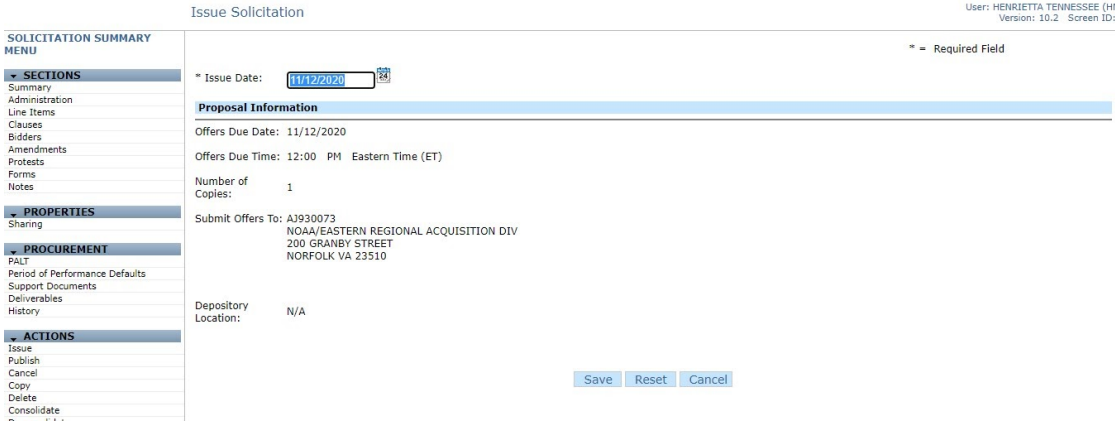
Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ You need to set up the Document Type prior to adding clauses ✓ Make sure you select the right type prior to adding clauses. ✓ If you enter clauses on a document type and have to change the type you will lose all clauses and have to start over.
<p>9b</p>	<p>The Solicitation Clause Management screen appears with a note on top:</p>  <p>➤ Click the <i>Select Clauses</i> menu option</p>
<p>10</p>	<p>The Select Clauses screen appears:</p>  <p>Using the drop-down arrows select:</p> <ul style="list-style-type: none"> ➤ Enter the Supplement (i.e. FAR) ➤ Enter the Filter Criteria #1 (i.e. Clause Number) ➤ Enter the Filter Criteria #3 field (i.e. 52.212-1) ➤ Click <i>Search</i>

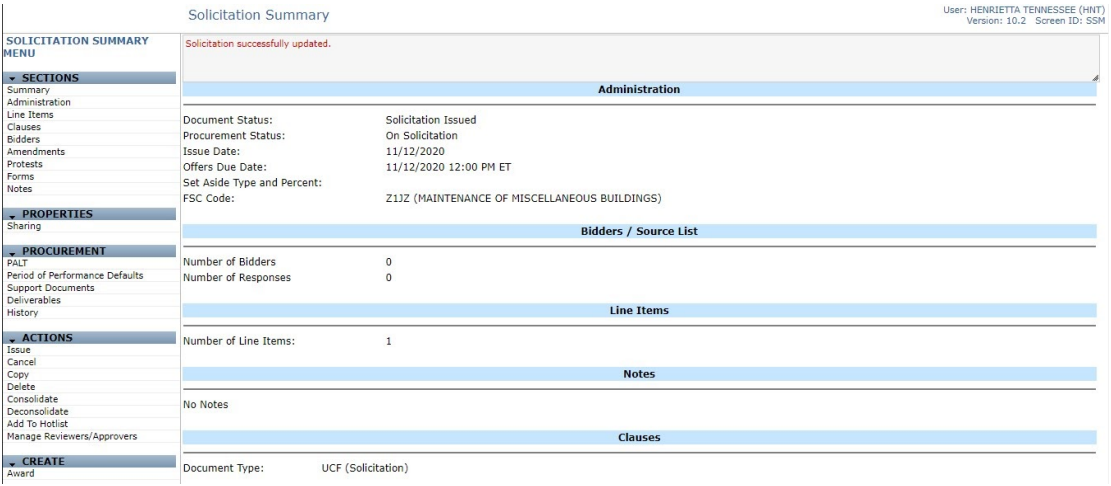

Step	Action
<p>10a</p>	<p>The Select Clauses screen appears with the value you looked up:</p>  <p>➤ Select the <i>Section</i> (i.e. L)</p> <p>➤ Check the box in front of the clause</p> <p>➤ Click <i>Add/Select</i></p>
<p>10b</p>	<p>The following message should appear at the top:</p> <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <p>1 of the 1 clauses selected were added to the document.</p> </div> <p>Using the above steps on adding a new clause, add the following as well:</p> <ul style="list-style-type: none"> ✓ 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) <p>When finished:</p> <p>➤ Click the <i>Clause Management</i> menu option</p>

Step	Action																																																																																								
10c	<p>The Solicitation Clause Management screen appears with the new clause added:</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="font-size: small; margin-top: 5px;">Solicitation Clause Management User: HENRIETTA TENNESSEE (HWI) Version: 10.2 Screen ID: CM</p> <p>SOLICITATION CLAUSE MENU</p> <ul style="list-style-type: none"> ACTIONS <ul style="list-style-type: none"> Set Document Type Select Clauses Create Text File Copy Delete IMPORTS <ul style="list-style-type: none"> From Local Matrix From Any Solicitation TOOLS <ul style="list-style-type: none"> Reorder Clauses Update Incorporated Code SYSTEM OPTIONS <ul style="list-style-type: none"> Summary OTHER SYSTEMS <p>Search Criteria Reset all Search Fields</p> <p>Items To Display: <input type="text" value="All"/> [v]</p> <p>Section: <input type="text" value="All"/> [v]</p> <p>Matrix Name: <input type="text" value="No Matrices"/> [v]</p> <p>Fill-Ins: <input type="text" value="All Clauses"/> [v]</p> <p>Origin: <input type="text" value=""/> [v]</p> <p>Filter on: <input type="text" value=""/> <input type="text" value=""/> [v] [v]</p> <p style="text-align: center;"><input type="button" value="Search"/></p> <p>Document Type: UCF (Solicitation)</p> <p>Results Sorted By: Section, Incorporated By Descending - Supplement Name, Clause Number/Text File Name Ascending</p> <p style="text-align: center;"><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p style="text-align: right;">Displaying 1 - 7 / 7</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <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>Origin</th> <th>Applicability</th> <th>Incorporated By</th> <th>Supplement Name</th> <th>Page Break Indicator</th> <th>Source</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>E</td> <td>1352.246-70</td> <td>Y</td> <td>PLACE OF ACCEPTANCE (APR 2010)</td> <td>Manual</td> <td></td> <td>F</td> <td>CAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>K</td> <td>52.212-4</td> <td>N</td> <td>CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></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 2018)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>K</td> <td>1352.201-70</td> <td>N</td> <td>CONTRACTING OFFICER'S AUTHORITY (APR 2010)</td> <td>Manual</td> <td></td> <td>F</td> <td>CAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>K</td> <td>1352.237-71</td> <td>N</td> <td>SECURITY PROCESSING REQUIREMENTS - LOW RISK CONTRACTS (APR 2010)</td> <td>Manual</td> <td></td> <td>F</td> <td>CAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>L</td> <td>52.212-1</td> <td>N</td> <td>INSTRUCTIONS TO OFFERORS--COMMERCIAL ITEMS (JUN 2020)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Solicitation</td> </tr> <tr> <td><input type="checkbox"/></td> <td>L</td> <td>52.232-33</td> <td>N</td> <td>PAYMENT BY ELECTRONIC FUNDS TRANSFER--SYSTEM FOR AWARD MANAGEMENT (OCT 2018)</td> <td>Manual</td> <td></td> <td>F</td> <td>FAR</td> <td>N</td> <td>Solicitation</td> </tr> </tbody> </table> <p style="text-align: center;">Displaying 1 - 7 / 7</p> </div> <p style="margin-top: 10px;">➤ Click the <i>Summary</i> menu option</p> <div style="background-color: yellow; padding: 5px; margin-top: 10px;"> <p>Notes: <i>If the clauses are not in the order you would like, use the Reorder Clauses menu option.</i></p> </div>	Mark	Section Id	Clause Number/Text File Name	Fill-In Indicator	Clause / Text File Title	Origin	Applicability	Incorporated By	Supplement Name	Page Break Indicator	Source	<input type="checkbox"/>	E	1352.246-70	Y	PLACE OF ACCEPTANCE (APR 2010)	Manual		F	CAR	N	Solicitation	<input type="checkbox"/>	K	52.212-4	N	CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (OCT 2018)	Manual		F	FAR	N	Solicitation	<input type="checkbox"/>	K	52.212-5	Y	CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS-- COMMERCIAL ITEMS (OCT 2018)	Manual		F	FAR	N	Solicitation	<input type="checkbox"/>	K	1352.201-70	N	CONTRACTING OFFICER'S AUTHORITY (APR 2010)	Manual		F	CAR	N	Solicitation	<input type="checkbox"/>	K	1352.237-71	N	SECURITY PROCESSING REQUIREMENTS - LOW RISK CONTRACTS (APR 2010)	Manual		F	CAR	N	Solicitation	<input type="checkbox"/>	L	52.212-1	N	INSTRUCTIONS TO OFFERORS--COMMERCIAL ITEMS (JUN 2020)	Manual		F	FAR	N	Solicitation	<input type="checkbox"/>	L	52.232-33	N	PAYMENT BY ELECTRONIC FUNDS TRANSFER--SYSTEM FOR AWARD MANAGEMENT (OCT 2018)	Manual		F	FAR	N	Solicitation
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Step	Action
<p>11</p>	<p>The Solicitation Summary screen appears:</p>  <p>➤ Click the <i>Forms</i> menu option</p>
<p>12</p>	<p>The Solicitation Form Setup screen appears:</p>  <p>➤ Click the checkboxes for those items you wish to show on the solicitation</p> <p>➤ Click <i>Apply</i></p> <p>➤ Click <i>View Form</i></p>

Step	Action																																																
12a	<p>A window prompt will appear:</p> <p>crequesttrain.eas.commerce.gov says</p> <p>This will open the form in PDF format in a new browser window. To return to the original form, please close the new window.</p> <div style="text-align: center;">  </div> <p>➤ Click <i>OK</i></p>																																																
12b	<p>A new browser window or tab in the browser opens. You may need to maximize it to view the Solicitation Form. Review the form in its completion prior to using the Adobe icons to save or print your solicitation form.</p> <div style="border: 1px solid black; padding: 5px;"> <p>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2">1. REQUISITION NUMBER NA-AJ2000-21-00035</td> <td colspan="2">PAGE 1 OF 3</td> </tr> <tr> <td>2. CONTRACT NO.</td> <td>3. AWARD/EFFECTIVE DATE</td> <td>4. ORDER NUMBER</td> <td>5. SOLICITATION NUMBER 1305M221QNAAJ0010</td> </tr> <tr> <td colspan="2">7. FOR SOLICITATION INFORMATION CALL: </td> <td>8. NAME HENRIETTA TENNESSEE HENRIETTA.TENNESSEE@TEST.NOAA.GOV</td> <td>6. TELEPHONE NUMBER (No collect calls) 301-444-3400</td> </tr> <tr> <td colspan="2">9. ISSUED BY NOAA/EASTERN REGIONAL ACQUISITION DIV 200 GRANBY STREET NORFOLK VA 23510</td> <td>10. THIS ACQUISITION IS <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS</td> <td>8. OFFER DUE DATE/ LOCAL TIME NOV 12, 2020 12:00 PM ET</td> </tr> <tr> <td colspan="2">11. DELIVERY FOR FOR DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE</td> <td>12. DISCOUNT TERMS</td> <td>13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/></td> </tr> <tr> <td colspan="2">15. DELIVER TO See Schedule</td> <td>16. ADMINISTERED BY</td> <td>13b. RATING</td> </tr> <tr> <td colspan="2">17a. CONTRACTOR/ OFFEROR. CODE</td> <td>18a. PAYMENT WILL BE MADE BY</td> <td>14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP</td> </tr> <tr> <td colspan="2">TELEPHONE NO. <input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER</td> <td colspan="2">18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM</td> </tr> <tr> <td>19. ITEM NO.</td> <td>20. SCHEDULE OF SUPPLIES/SERVICES</td> <td>21. QUANTITY</td> <td>22. UNIT</td> </tr> <tr> <td></td> <td>Please see continuation page for line item details.</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>23. UNIT PRICE</td> </tr> <tr> <td></td> <td></td> <td></td> <td>24. AMOUNT</td> </tr> </table> <p style="text-align: center; font-size: small;">(Use Reverse and/or Attach Additional Sheets as Necessary)</p> <p>➤ Close the window or the tab when finished</p> </div>	1. REQUISITION NUMBER NA-AJ2000-21-00035		PAGE 1 OF 3		2. CONTRACT NO.	3. AWARD/EFFECTIVE DATE	4. ORDER NUMBER	5. SOLICITATION NUMBER 1305M221QNAAJ0010	7. FOR SOLICITATION INFORMATION CALL:		8. NAME HENRIETTA TENNESSEE HENRIETTA.TENNESSEE@TEST.NOAA.GOV	6. TELEPHONE NUMBER (No collect calls) 301-444-3400	9. ISSUED BY NOAA/EASTERN REGIONAL ACQUISITION DIV 200 GRANBY STREET NORFOLK VA 23510		10. THIS ACQUISITION IS <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS	8. OFFER DUE DATE/ LOCAL TIME NOV 12, 2020 12:00 PM ET	11. DELIVERY FOR FOR DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS	13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700) <input type="checkbox"/>	15. DELIVER TO See Schedule		16. ADMINISTERED BY	13b. RATING	17a. CONTRACTOR/ OFFEROR. CODE		18a. PAYMENT WILL BE MADE BY	14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input checked="" type="checkbox"/> RFP	TELEPHONE NO. <input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER		18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM		19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT		Please see continuation page for line item details.						23. UNIT PRICE				24. AMOUNT
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Step	Action
12c	<p>The Solicitation Form Setup page will show with our applied changes:</p>  <p>➤ Click the <i>Issue</i> menu option</p>
13	<p>The Issue Solicitation screen appears:</p>  <p>➤ Either Accept the Issue Date or change it to a different one</p> <p>➤ Click <i>Save</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ The Issue Date field automatically populates with the current system date. ✓ The Issue Date field can be changed. ✓ The Issue Date field should not be after the Offers Due Date.

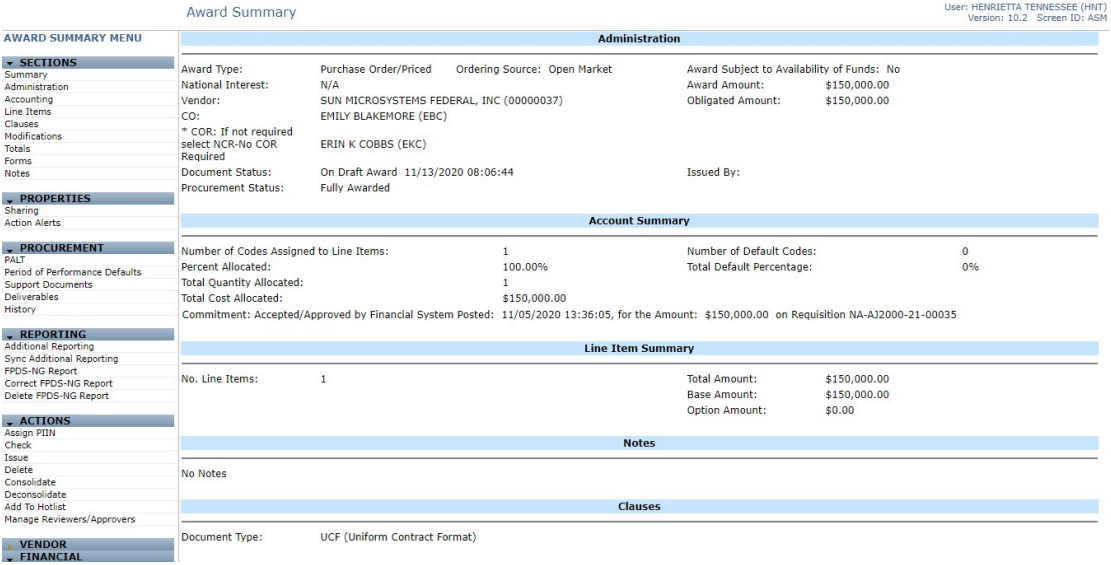
Step	Action
<p>14</p>	<p>The Solicitation Summary screen appears with the Document Status now stating Solicitation Issued:</p>  <p>Click <i>Home</i> in the Standard Menu Bar to work on another document since you have issued the solicitation and are waiting for the bids to come in to select a vendor.</p>
<p>15</p>	<p>For purposes of TRAINING ONLY, we are going to assume we have received the bids and have selected a vendor. So now we are able to Create an Award.</p>  <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>In production, the solicitation might be hot listed for easy access when the solicitation has finished.</i> ✓ <i>In production, you would be done with this solicitation until you have selected the vendor</i>
<p>16</p>	<p>The Award PIIN and Name screen appears:</p> <ul style="list-style-type: none"> ➤ Select the Contract type (i.e. Purchase Order Priced) ➤ Select the Award Number (i.e. 1305M2-FY-P-####-????) ➤ Type the Award Name (i.e. {date} EX 5 {Training Initials} AWD) ➤ Click <i>Save</i>

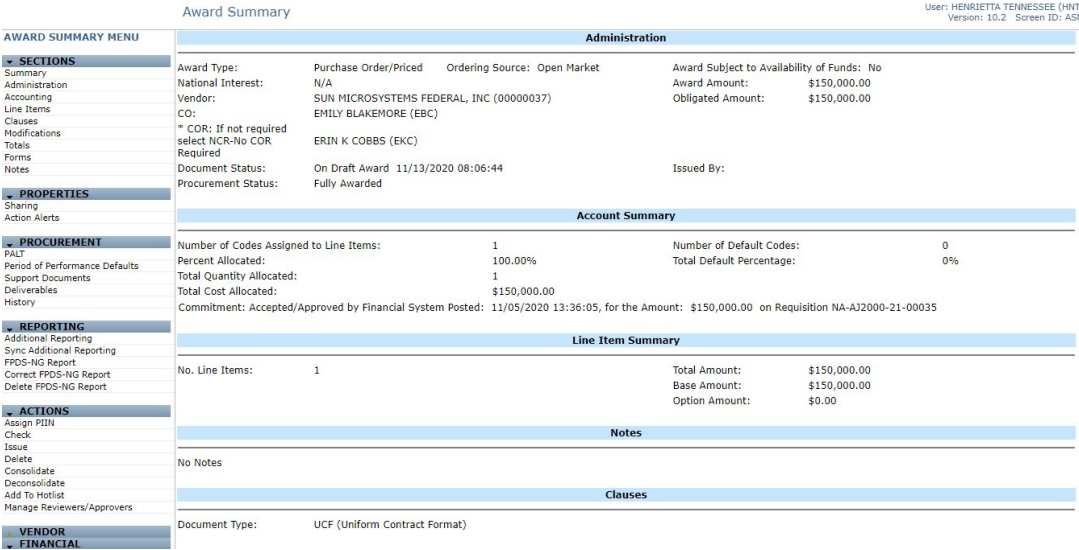
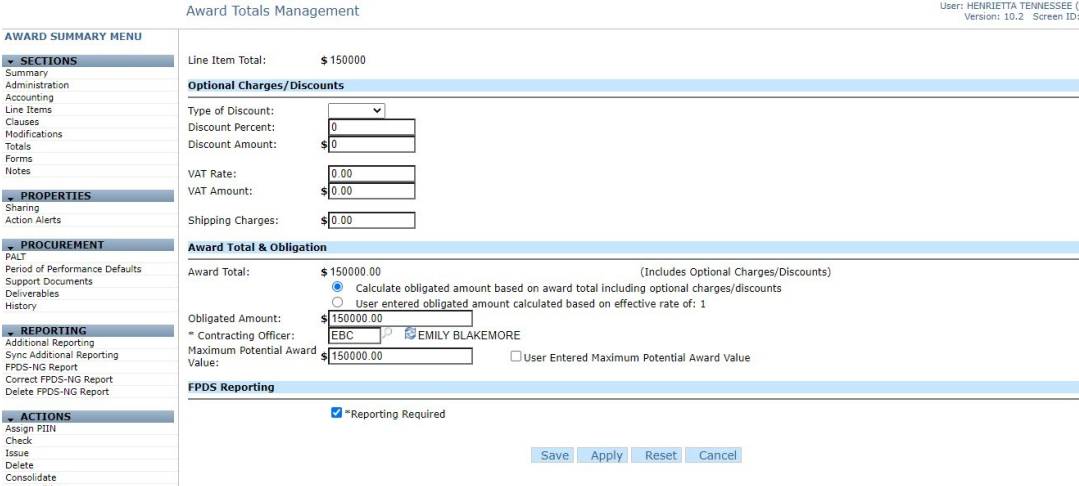
Step	Action
17	<p>The Award Administration screen <i>Administration</i> tab appears for you to fill out the following fields:</p> <ul style="list-style-type: none"> ➤ Enter the CO (i.e. EBC) ➤ Change the Award Date (Defaults to current date) ➤ Enter the Signed On Date (i.e. 2 days from current date) ➤ Enter the Start Date (i.e. 2 days from current date) ➤ Enter the Expiration Date (i.e. date from the requisition) ➤ Enter the Est. Ultimate Completion Date (i.e. date from the requisition) ➤ Enter the Vendor (i.e. 00000037) Sun Micro Systems ➤ Enter the Business Size Indicator (i.e. Small) ➤ Click the <i>Properties</i> tab
17a	<p>The Award Administration screen <i>Properties</i> tab appears for you to fill out the following fields:</p> <ul style="list-style-type: none"> ➤ Change the Delivery Date (i.e. PR delivery date – should fill in) ➤ Change the FOB Designation (if needed) ➤ Enter the Ship Via: address (if needed) ➤ Enter the NAICS Code (i.e. 333145 – should fill in from Solicitation) ➤ Check the Contractor required to sign checkbox ➤ Enter the # of copies to Issuing Office (i.e. 1) ➤ Enter the # of Invoice Copies (i.e. 3) ➤ Click the <i>Addresses</i> tab
17b	<p>The Award Administration screen <i>Addresses</i> tab appears for you to fill out the following fields:</p> <ul style="list-style-type: none"> ➤ Verify addresses have been filled out, enter any that have not. ➤ Click the <i>Funding</i> tab

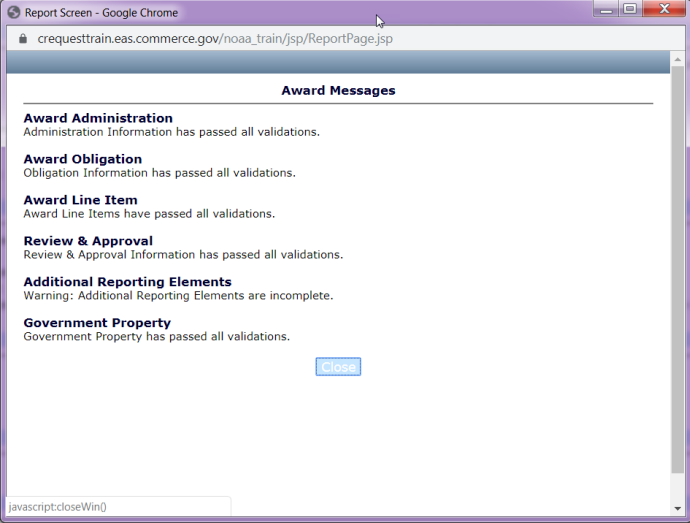
Step	Action
17c	<p>The Award Administration screen <i>Funding</i> tab appears:</p> <ul style="list-style-type: none"> ➤ Enter the # of days for Constructive Acceptance (i.e. 007) ➤ Check the Subject to Prompt Pay checkbox ➤ Select the Payment Type (i.e. EFT) ➤ The Treasury Account Symbol defaults from the PR ➤ Click the <i>Form Info</i> tab
17d	<p>The Award Administration screen <i>Form Info</i> tab appears:</p> <ul style="list-style-type: none"> ➤ Choose the Form (i.e. OF347 Order for Supplies/Services) ➤ Click <i>Save</i>
18	<p>The Award Summary screen appears:</p>  <p>The screenshot shows the 'Award Summary' screen with a navigation menu on the left and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, REPORTING, and ACTIONS. The main content area displays details for an award, including 'Administration', 'Account Summary', 'Line Item Summary', and 'Notes'. A status message at the top says 'Award successfully updated.'.</p> <ul style="list-style-type: none"> ➤ Click the <i>Line Items</i> menu option
19	<p>The Award Line Item Management screen appears:</p> <ul style="list-style-type: none"> ➤ Click <i>Search</i>

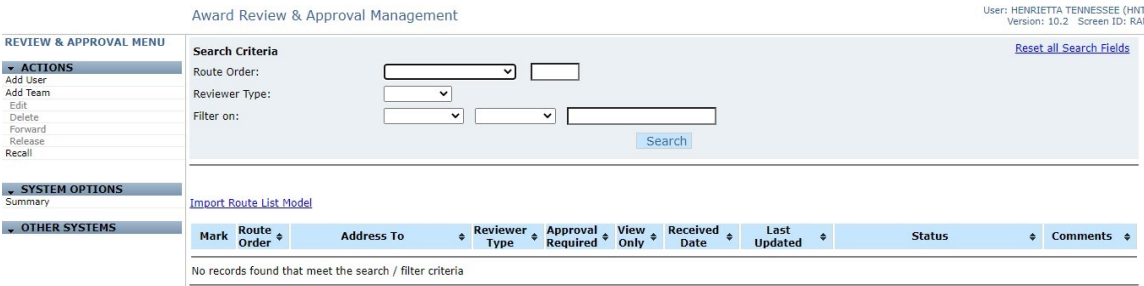
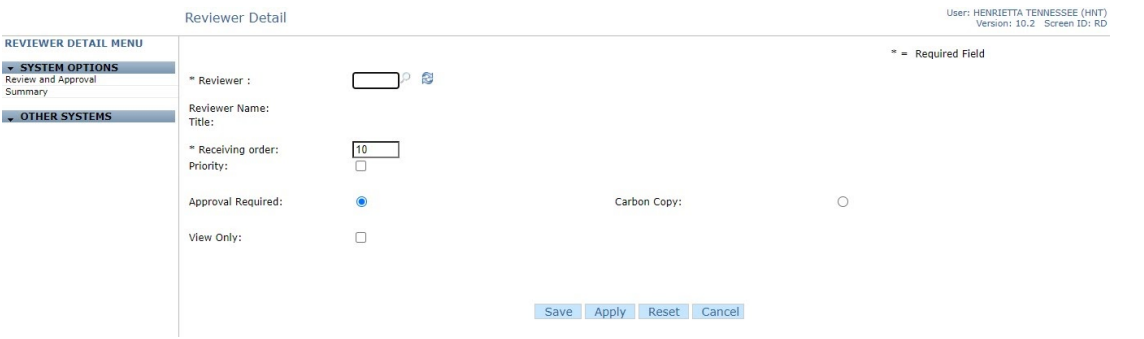
Step	Action
20	<p>The Line Items associated to the Award will appear:</p> <ul style="list-style-type: none"> ➤ To review a line, click on the <i>Line #</i>
20a	<p>The Award Line Item Detail screen <i>Administration</i> view tab appears:</p> <ul style="list-style-type: none"> ➤ Enter any Cost changes (if necessary) <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The cost can be changed only if it was less than the original committed amount.</i> ✓ <i>If the cost ends up being more than the original committed amount an additional PR must be sent for the additional amount and be consolidated to the original award.</i> ✓ <i>Anytime changes are made to cost from the original commitment the accounting has to be reviewed and possibly adjust.</i>
20b	<p>The Award Line Item Detail screen <i>Address</i> view tab appears:</p> <ul style="list-style-type: none"> ➤ Review the information on the screen, making any necessary changes ➤ Click <i>Apply</i> ➤ Click the <i>Accounting</i> menu option
21	<p>The Award Line Item Management screen appears:</p> <ul style="list-style-type: none"> ➤ The account codes associated with this line appear <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Verifying the accounting is important especially if you made costs changes on the line.</i> ✓ <i>Verify how the accounting was allocated (percent, cost, or quantity).</i> ✓ <i>If the accounting was allocated by percent, when the cost changes it should automatically update the cost associated to the accounting.</i> ✓ <i>If the accounting was allocated by cost/quantity, the cost will not update automatically and it will need to be changed to the correct amount.</i>

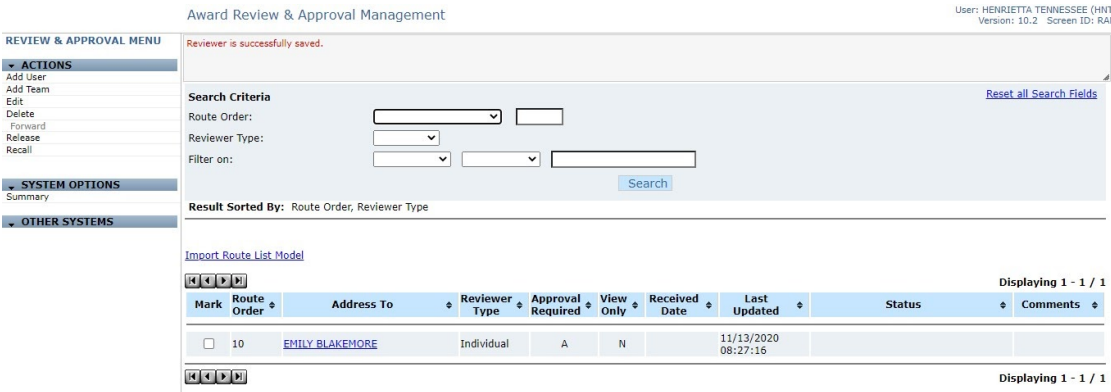
Step	Action
<p>21a</p>	<p>To view the sections of the ACCS, click the <i>Account Code</i>.</p> <div data-bbox="300 394 1421 829" style="border: 1px solid gray; padding: 5px;"> <p style="text-align: right; font-size: small;">User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: AACD</p> <p style="text-align: center;">Account Code Detail</p> <p>ACCOUNT CODE DETAIL MENU</p> <ul style="list-style-type: none"> Accounting Summary Line Items <p>SYSTEM OPTIONS</p> <p>Line Item No.: 0001, MAIN HVAC REPLACEMENT WITH GROUND SOURCE HEAT PUMP AT OFFICE IN GERMANTOWN, MD * = Required Field</p> <p>Bureau Code (2): 14 Import Entire Account Code</p> <p>Fiscal Year (2): 21</p> <p>OTHER SYSTEMS</p> <p>Project (7): 28LEF28</p> <p>Task (3): B00</p> <p>Fund (4): 0001</p> <p>Program (9): 022116001</p> <p>Organization (16): 3021000200000000</p> <p>Object Class (8): 25272535</p> <p>User Defined (6): 000000</p> <p>Allocation By: Cost</p> <p>Percent: 100 Cost: 150000 Quantity: 1</p> <p>Commit Amount: <input type="text" value="150000"/> Committed Amount: 150,000.00</p> </div> <p>The screen will change to show you the individual sections as well as how it was allocated: percent, cost or quantity.</p> <ul style="list-style-type: none"> ➤ When you are finished reviewing, click the <i>Line Items</i> menu option <div style="background-color: yellow; padding: 10px; margin-top: 10px;"> <p>Notes:</p> <ul style="list-style-type: none"> ✓ To edit the accounting you will need to check the checkbox and select Edit menu option ✓ Clicking on the accounting string will only let you view the information not edit. </div>
<p>21b</p>	<p>The Award Line Item Management screen will appear:</p> <ul style="list-style-type: none"> ➤ Review the rest of the line items and accounting for each. ➤ When you are finished, click the <i>Summary</i> menu option

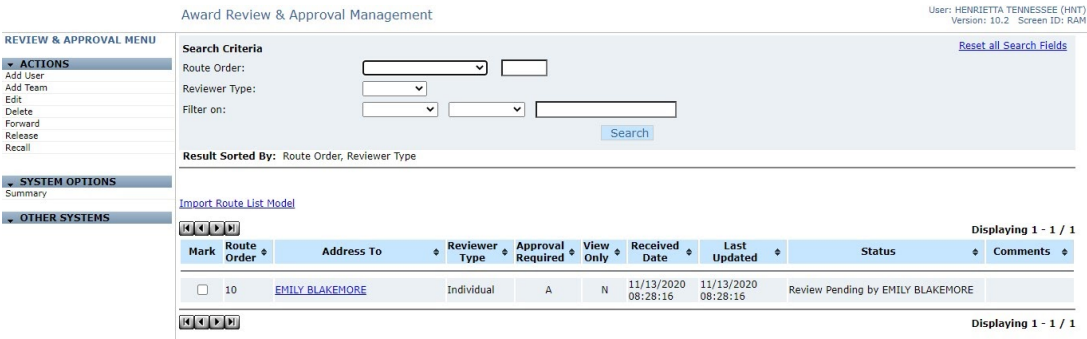
Step	Action
<p>22</p>	<p>The Award Summary screen appears:</p>  <p>The screenshot shows the 'Award Summary' screen with a left-hand navigation menu and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, REPORTING, ACTIONS, and VENDOR. The main content area is divided into several summary sections: Administration (Award Type, National Interest, Vendor, CO, etc.), Account Summary (Number of Codes Assigned, Percent Allocated, etc.), Line Item Summary (No. Line Items, Total Amount, etc.), Notes (No Notes), and Clauses (Document Type). A user name 'HENRIETTA TENNESSEE (HWT)' is visible in the top right corner.</p> <p>➤ Click the <i>Clauses</i> menu option</p>
<p>23</p>	<p>The Award Clause Management screen appears:</p> <ul style="list-style-type: none"> ➤ Click <i>Search</i> ➤ Verify the Clauses are populated based on the solicitation ➤ Add additional clauses if needed ➤ When you are finished, click <i>Save</i>

Step	Action
<p>23</p>	<p>The Award Summary screen appears:</p>  <p>The screenshot shows the 'Award Summary' screen with a navigation menu on the left and a main content area. The 'Administration' section includes details like National Interest (N/A), Vendor (SUN MICROSYSTEMS FEDERAL, INC), and Procurement Status (Fully Awarded). The 'Account Summary' section shows 100% allocation. The 'Line Item Summary' shows a total amount of \$150,000.00. The 'Notes' section is empty, and the 'Clauses' section is also empty.</p> <p>➤ Click the <i>Totals</i> menu option.</p>
<p>24</p>	<p>The Award Totals Management screen appears:</p>  <p>The screenshot shows the 'Award Totals Management' screen. It includes fields for 'Optional Charges/Discounts' (all set to \$0), 'Award Total & Obligation' (Award Total: \$150,000.00), and 'FPDS Reporting' (with a checked box for '*Reporting Required'). The 'Contracting Officer' is listed as EMILY BLAKEMORE. Buttons for 'Save', 'Apply', 'Reset', and 'Cancel' are visible at the bottom.</p> <p>➤ Validate the Award Totals</p> <p>➤ Uncheck the FPDS Reporting box (for training purposes ONLY)</p> <p>➤ Click <i>Save</i></p>

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>In production FPDS cannot be unchecked and this step is not necessary</i>
25	<p>The Award Summary screen appears:</p> <ul style="list-style-type: none"> ➤ Click the <i>Check</i> menu option
26	<p>A pop-up window appears:</p>  <ul style="list-style-type: none"> ➤ Check for errors. If there are none, then continue ➤ Click <i>Close</i> <p>Notes:</p> <ul style="list-style-type: none"> ✓ This option does not display CFS obligation errors, only those from C.Suite. ✓ This process is good to perform prior to doing FPDS reporting to help minimize the need to delete the FPDS report to fix errors. ✓ Warnings will still allow you to proceed. ✓ For Training Purposes, we are not doing FPDS.
27	<p>The next step is to set up the routing list. To do this, click the <i>Manage Reviewers/Approvers</i> menu option.</p>

Step	Action
<p>28</p>	<p>The Award Review & Approval Management screen appears. This is where you will set up the routing for your document.</p>  <p>➤ Click the <i>Add User</i> menu option</p>
<p>28a</p>	<p>The Reviewer Detail screen appears. It is here where you will be entering your information pertaining on how your award will route through the system.</p>  <p>➤ Enter the Reviewer Code (i.e. EBC)</p> <p>➤ Leave the Receiving Order the number as it is</p> <p>➤ Make sure the Approval Required radio button is selected</p> <p>➤ Click <i>Save</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ If you are entering the code, be 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.

Step	Action
28b	<p>The Award Review & Approval Management screen appears with your approver showing.</p>  <p>➤ Click the <i>Release</i> menu options</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Code under Approval Requested:</i> <i>A = Approval Required</i> <i>C = Carbon Copy</i> ✓ <i>Codes under View Only:</i> <i>Y = Yes, Read Only Access</i> <i>N = No, Full Read/Write Access</i> ✓ <i>In order for the document to be sent to the people listed, you must click Release.</i>

Step	Action
28c	<p>The Award Review & Approval Management screen will then show the date/time and status of the review.</p>  <p>At this point, following the flow chart, your approver must complete the process.</p> <ul style="list-style-type: none"> ➤ Click Home from the <i>Standard Menu Bar</i>
29	<p>At this point, the Approver goes through the steps of Reviewing the Award, Reviewing/Approving the FPDS Report, Obligate the Award, Issue the Award and Approve it.</p>

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Exercise #6: Create an Amendment on a Solicitation

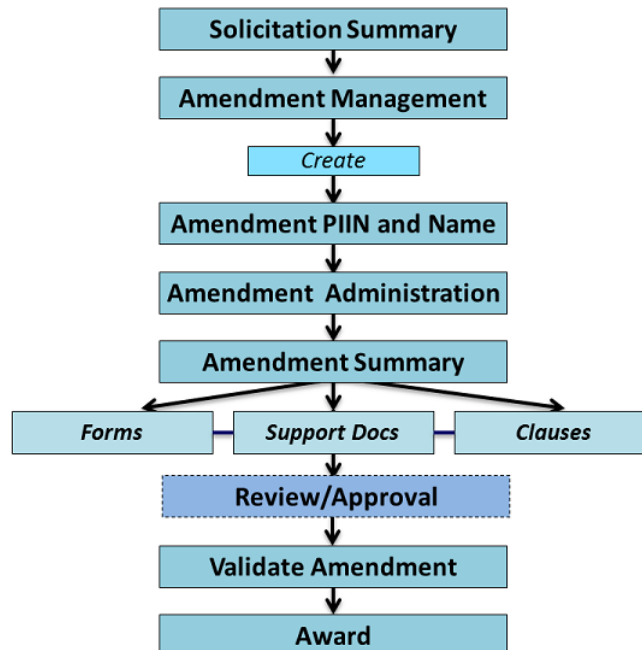
- Objectives:*
- Navigate through C.Award
 - Create an amendment on a solicitation
 - Follow flow chart

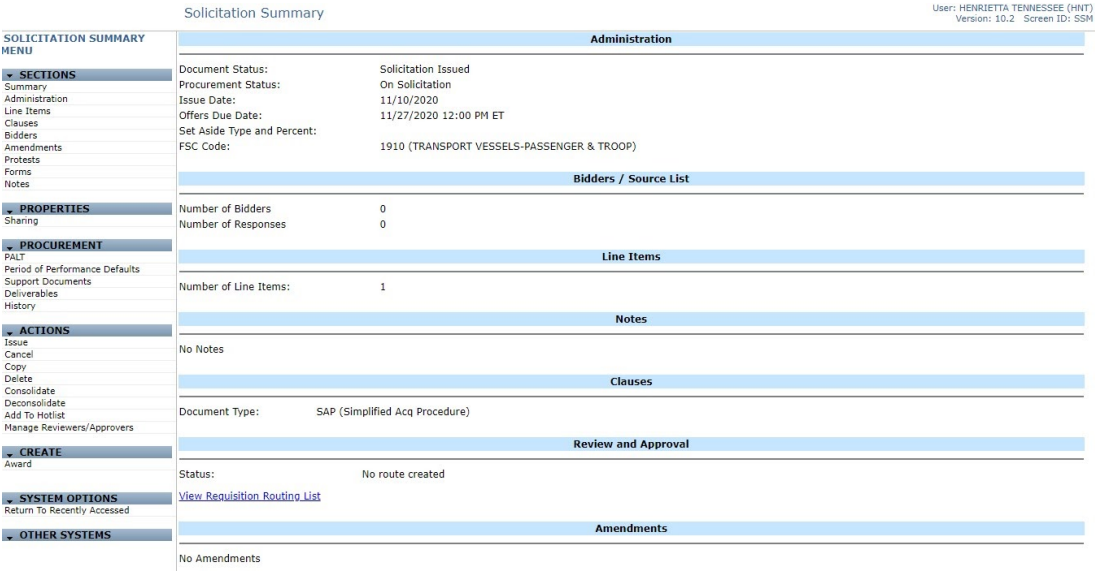
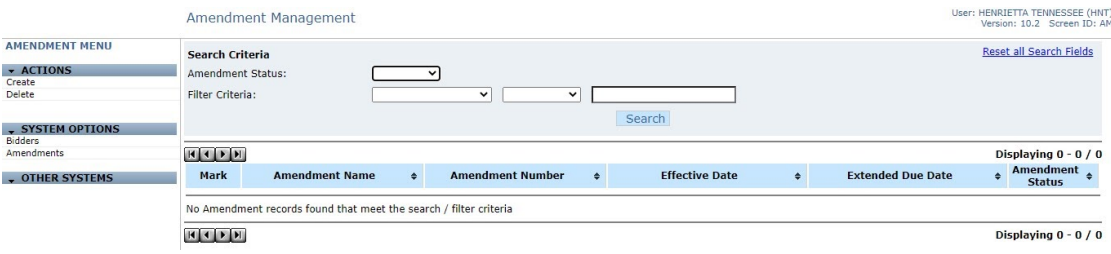
Instructions: Execute the following steps:


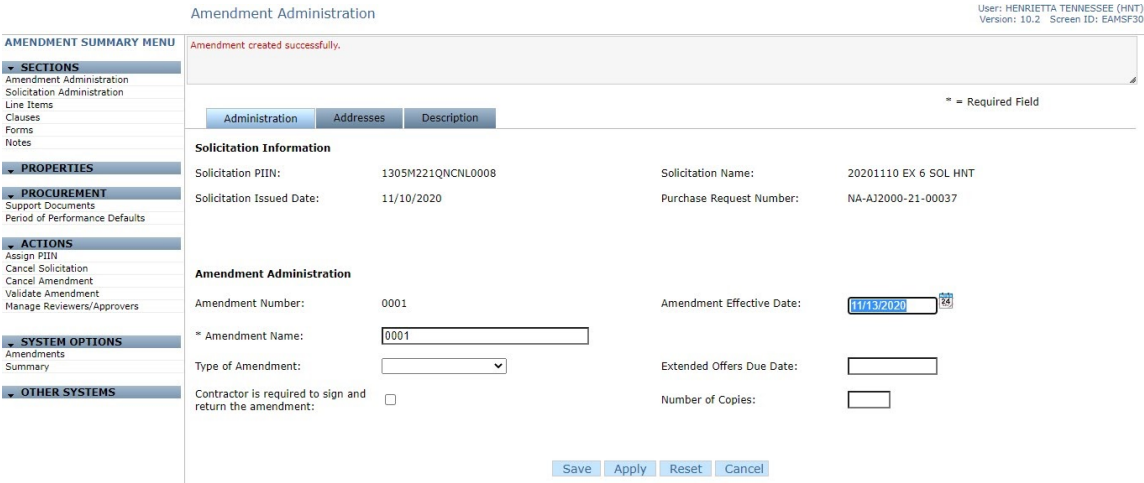
Amendments happen for various reasons: Adding clauses required by law after issuing a solicitation, extending the time to respond, correcting/amending statement of work, technical specifications, or you can amend to cancel the solicitation.

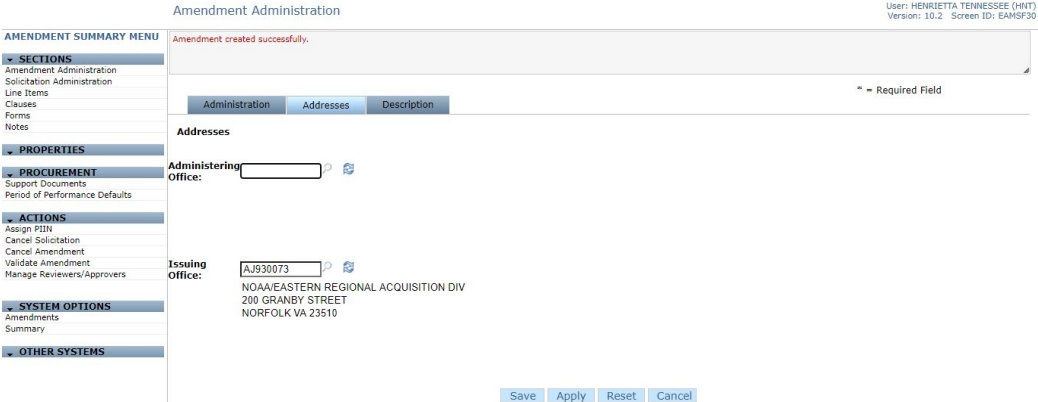
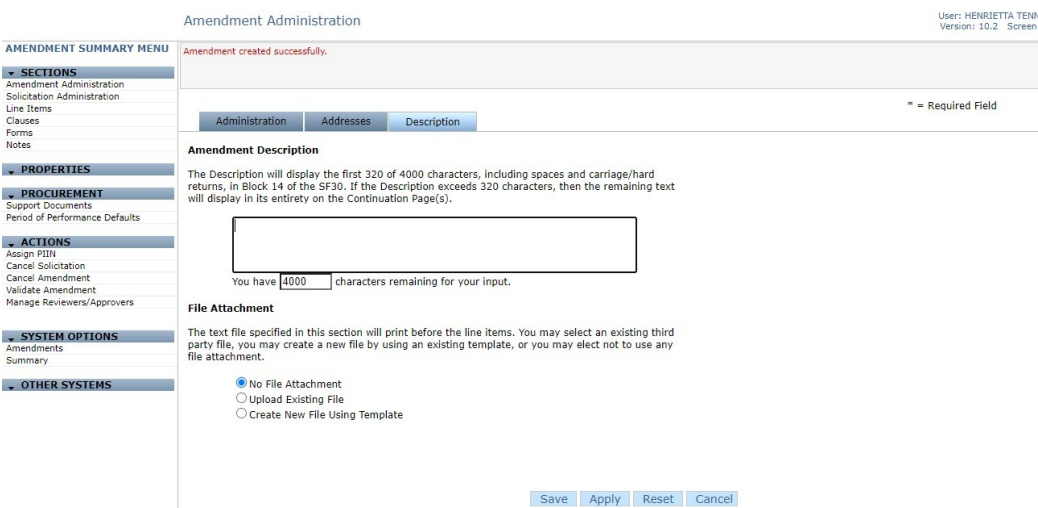
For this example, the date for the original solicitation is coming up and a few of the people bidding needed an additional day. Follow the flow chart to amend the solicitation to update the return date of the bids.

Amendment Solicitation Flow

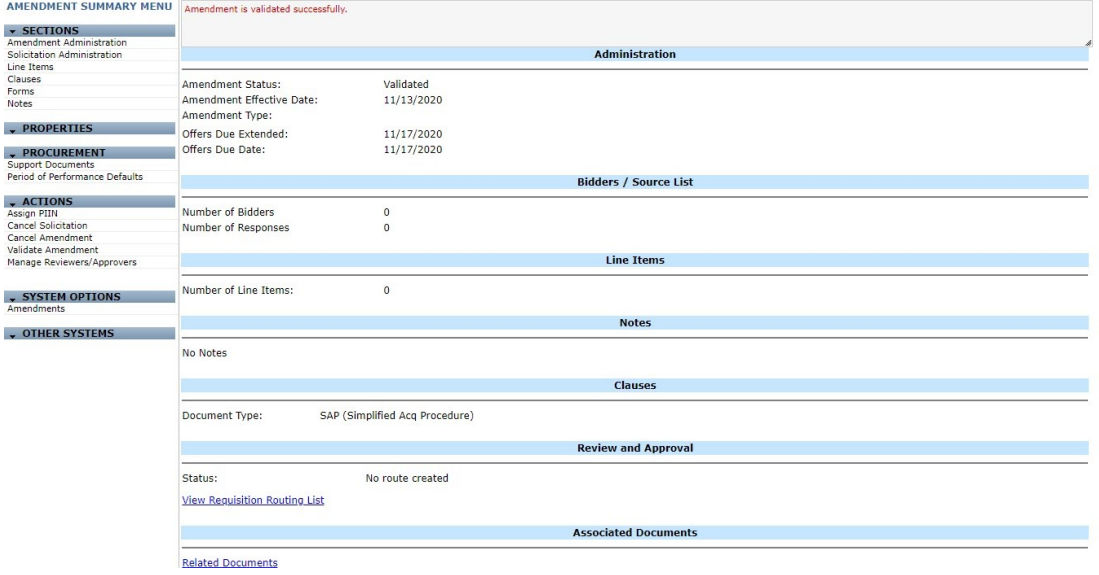


Step	Action
1	From the Hotlist or the Worksheet, find the solicitation that needs to be amended and click to open it.
2	<p>The Solicitation Summary screen appears.</p>  <p>➤ Click the <i>Amendments</i> menu option</p>
3	<p>The Amendment Management screen appears.</p>  <p>➤ Click the <i>Create</i> menu option</p>

Step	Action
<p>4</p>	<p>The Amendment PIIN and Name screen appears.</p>  <p>➤ Click <i>Save</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ Under the new PIID structure, amendments are system generated.
<p>5</p>	<p>The Amendment Administration screen appears on the <i>Administration</i> view tab.</p>  <ul style="list-style-type: none"> ➤ Enter the Type of Amendment (i.e. Offers Due Extended) ➤ Check whether the 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. one more day from original solicitation) ➤ Click the <i>Addresses</i> tab

Step	Action
<p>6</p>	<p>The Amendment Administration screen appears on the <i>Addresses</i> view tab.</p>  <ul style="list-style-type: none"> ➤ Add/Change any Office Codes. (i.e. copy issuing address and add it to Administering Office.) ➤ Click the <i>Description</i> tab
<p>7</p>	<p>The Amendment Administration screen appears on the <i>Description</i> view tab.</p>  <ul style="list-style-type: none"> ➤ Enter the description if needed ➤ Click Save

Step	Action
<p>8</p>	<p>The Amendment Summary screen appears:</p> <p>➤ Click the <i>Validate</i> menu option</p>
<p>9</p>	<p>The Validate Amendment screen appears.</p> <p>➤ Verify the information is correct on screen</p> <p>➤ Change the Amendment Effective Date if needed (i.e. it will default to current date)</p> <p>➤ Click <i>Save</i></p>

Step	Action
<p>10</p>	<p>The Amendment Summary screen appears:</p>  <p>AMENDMENT SUMMARY MENU Amendment is validated successfully.</p> <ul style="list-style-type: none"> SECTIONS <ul style="list-style-type: none"> Amendment Administration Solicitation Administration Line Items Clauses Forms Notes PROPERTIES PROCUREMENT <ul style="list-style-type: none"> Support Documents Period of Performance Defaults ACTIONS <ul style="list-style-type: none"> Assign PIIN Cancel Solicitation Cancel Amendment Validate Amendment Manage Reviewers/Approvers SYSTEM OPTIONS <ul style="list-style-type: none"> Amendments OTHER SYSTEMS <p>Administration</p> <p>Amendment Status: Validated Amendment Effective Date: 11/13/2020 Amendment Type: Offers Due Extended: 11/17/2020 Offers Due Date: 11/17/2020</p> <p>Bidders / Source List</p> <p>Number of Bidders: 0 Number of Responses: 0</p> <p>Line Items</p> <p>Number of Line Items: 0</p> <p>Notes</p> <p>No Notes</p> <p>Clauses</p> <p>Document Type: SAP (Simplified Acq Procedure)</p> <p>Review and Approval</p> <p>Status: No route created View Requisition Routing List</p> <p>Associated Documents</p> <p>Related Documents</p>
<p>11</p>	<ul style="list-style-type: none"> ➤ Click the <i>Forms</i> menu option ➤ Follow the procedures for printing out the amendment and send it to the bidding companies. ➤ When bidding is complete, return to this solicitation and follow the process for creating an award

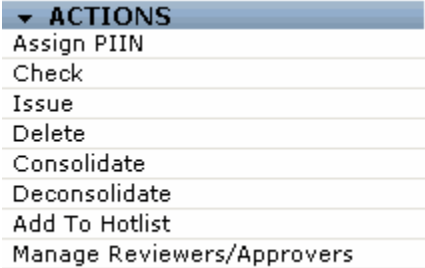
Exercise #7: Consolidate PRs before Awarding

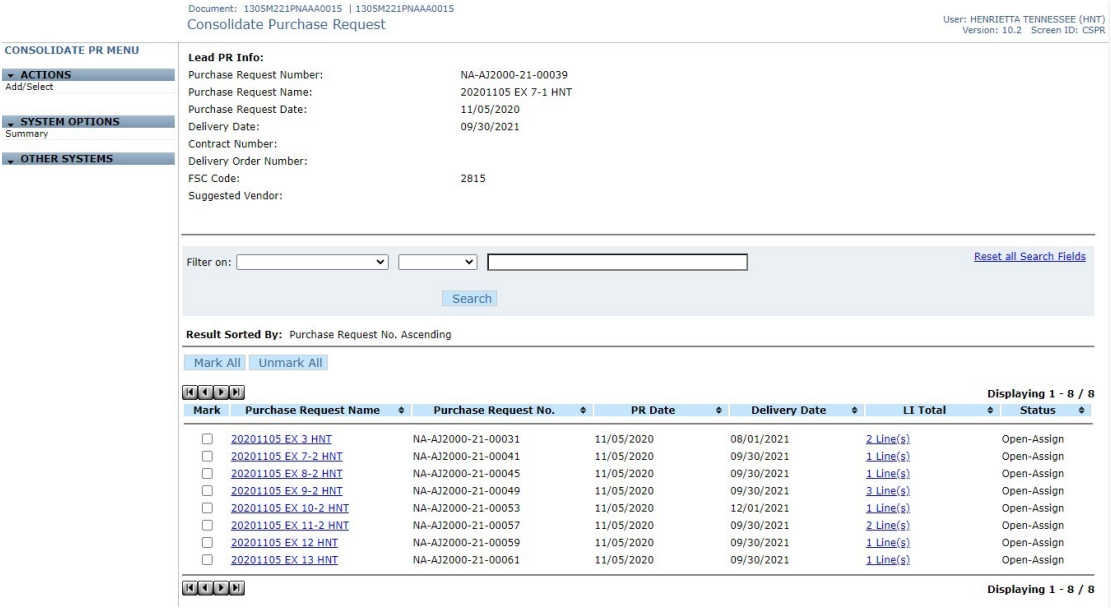
Objectives:

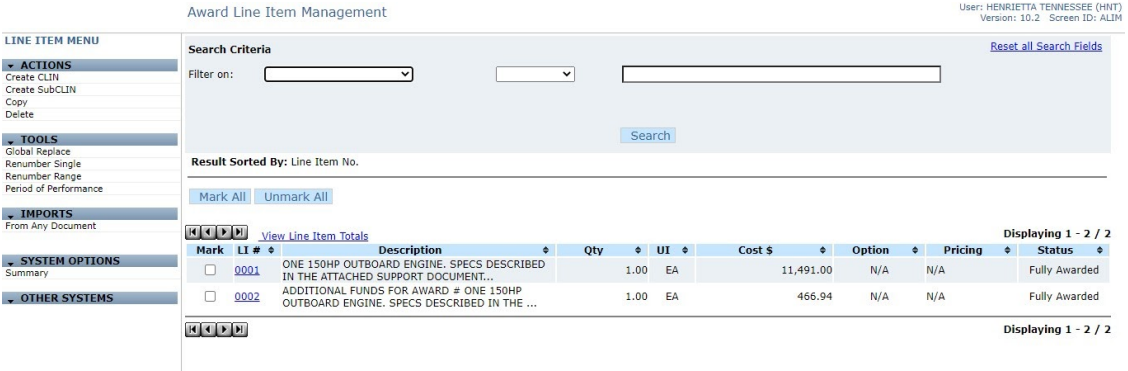
- Navigate through C.Award
- Understand how to consolidate a PR for additional funds on an award

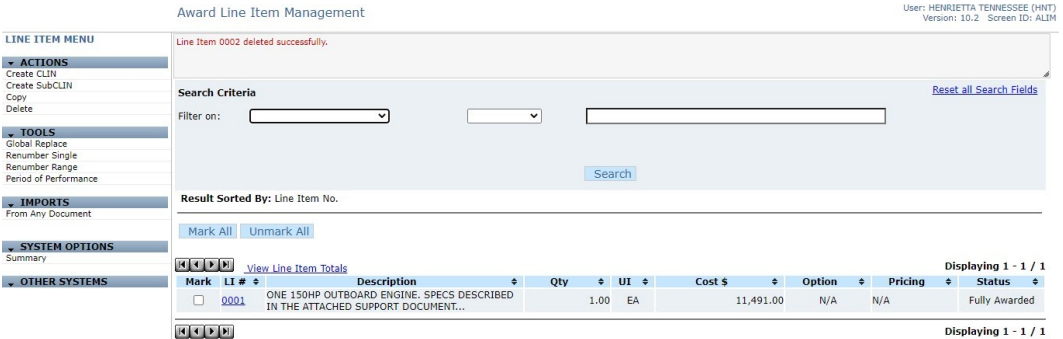
Instructions: Execute the following steps:

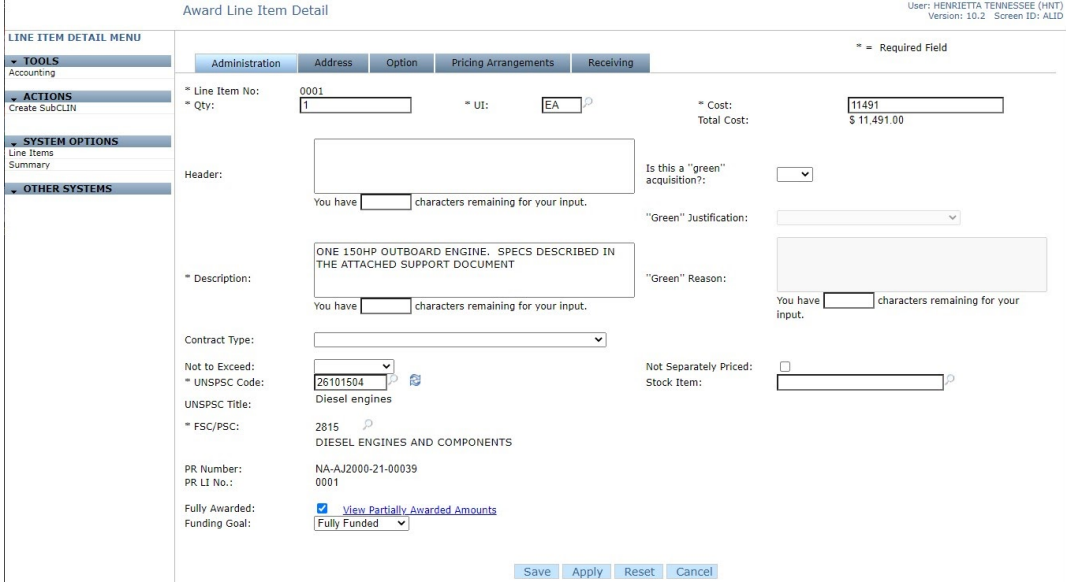
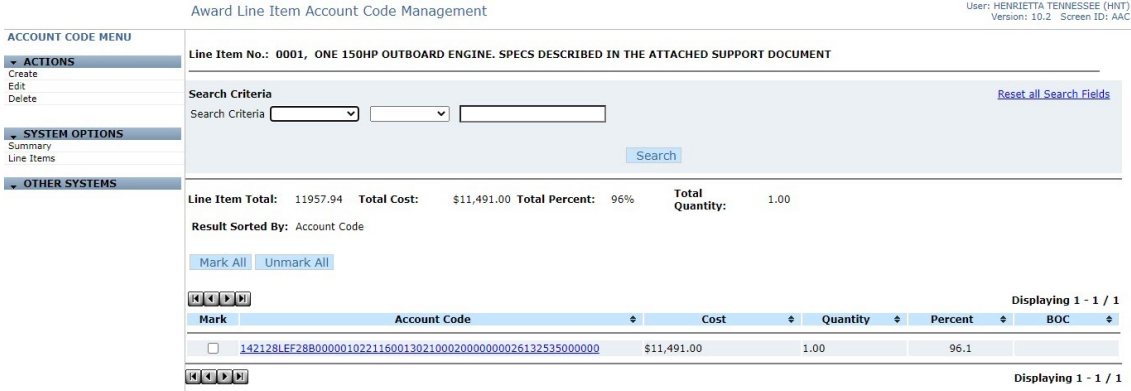
A solicitation has been sent out and returned with the lowest bid totaling around \$500 more than the original PR. You speak to the office requesting the product and they agree to the extra money. To award this PR, you ask that they send you a new purchase request for the additional funds.

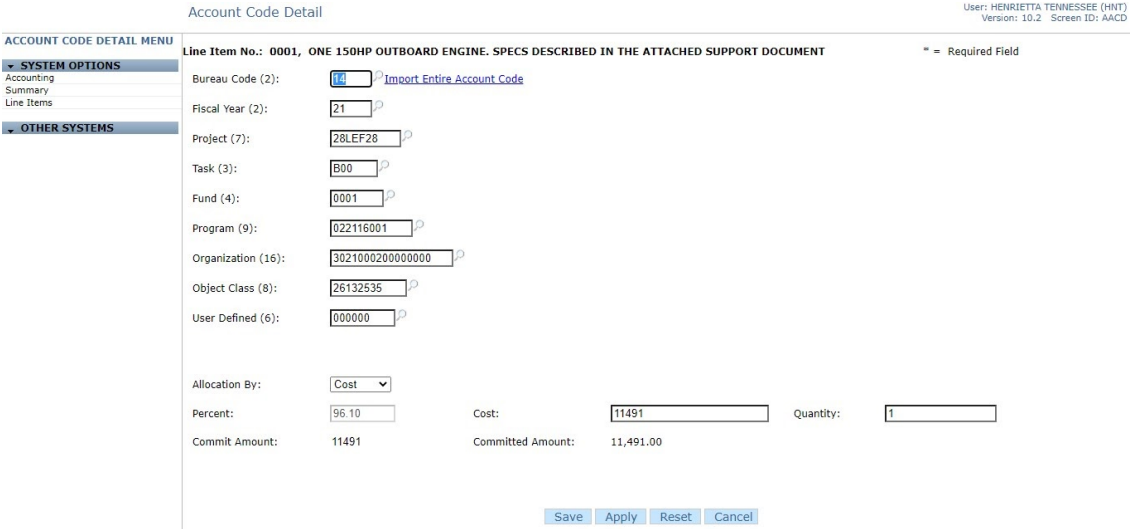
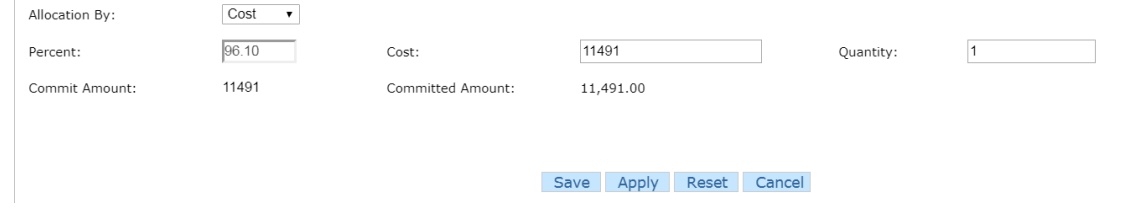
Step	Action	
1	You receive the PR for the additional funds. Do the following: <ul style="list-style-type: none"> ➤ Review the original PR making note of the delivery date, amount, etc. ➤ Review the new PR, making note of the Accounting, PR #, amount, etc. ➤ Create the Award from the Solicitation ➤ Fill out all sections of the Administration screen 	
2	On the Award Summary screen: <ul style="list-style-type: none"> ➤ Click the <i>Consolidate</i> menu option 	

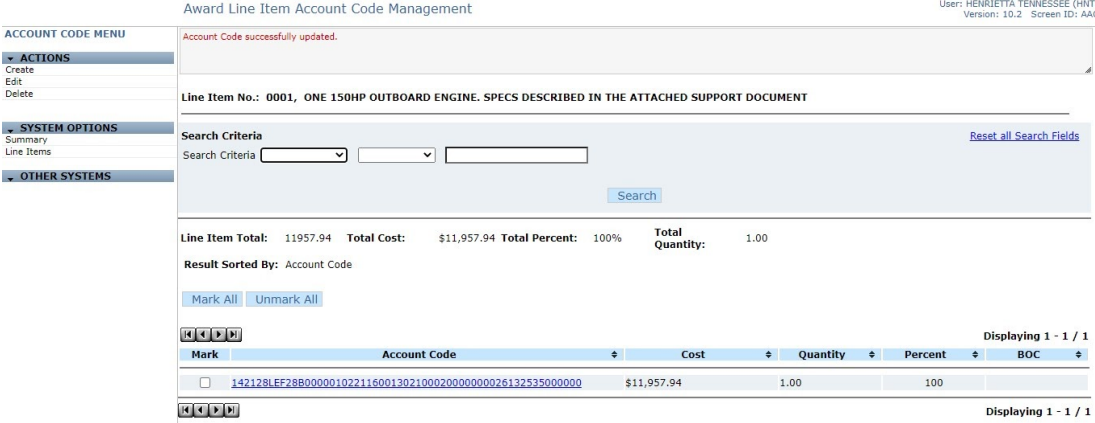
Step	Action																																																															
<p>3</p>	<p>The Consolidate Purchase Request screen appears:</p>  <p>Document: 1305M221PNAAA0015 1305M221PNAAA0015 Consolidate Purchase Request</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: CSFR</p> <p>CONSOLIDATE PR MENU</p> <ul style="list-style-type: none"> ACTIONS Add/Select SYSTEM OPTIONS Summary OTHER SYSTEMS <p>Lead PR Info:</p> <p>Purchase Request Number: NA-AJ2000-21-00039 Purchase Request Name: 20201105 EX 7-1 HNT Purchase Request Date: 11/05/2020 Delivery Date: 09/30/2021 Contract Number: Delivery Order Number: FSC Code: 2815 Suggested Vendor:</p> <p>Filter on: [] [] [] Reset all Search Fields</p> <p><input type="button" value="Search"/></p> <p>Result Sorted By: Purchase Request No. Ascending</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p>Displaying 1 - 8 / 8</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>Purchase Request Name</th> <th>Purchase Request No.</th> <th>PR Date</th> <th>Delivery Date</th> <th>LI Total</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 3 HNT</td> <td>NA-AJ2000-21-00031</td> <td>11/05/2020</td> <td>08/01/2021</td> <td>2 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 7-2 HNT</td> <td>NA-AJ2000-21-00041</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>1 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 8-2 HNT</td> <td>NA-AJ2000-21-00045</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>1 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 9-2 HNT</td> <td>NA-AJ2000-21-00049</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>3 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 10-2 HNT</td> <td>NA-AJ2000-21-00053</td> <td>11/05/2020</td> <td>12/01/2021</td> <td>1 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 11-2 HNT</td> <td>NA-AJ2000-21-00057</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>2 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 12 HNT</td> <td>NA-AJ2000-21-00059</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>1 Line(s)</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>20201105 EX 13 HNT</td> <td>NA-AJ2000-21-00061</td> <td>11/05/2020</td> <td>09/30/2021</td> <td>1 Line(s)</td> <td>Open-Assign</td> </tr> </tbody> </table> <p>Displaying 1 - 8 / 8</p> <p>All Open PRs will show on this screen. Search to locate the PR.</p> <p><input type="checkbox"/> 20201105 EX 7-2 HNT</p> <p>Once you find the PR, do the following:</p> <ul style="list-style-type: none"> ➤ Check the box in front of the PR you want to consolidate ➤ Click the <i>Add/Select</i> menu options <p>The following message will appear</p> <p>PR 20201105 EX 7-2 HNT successfully consolidated.</p> <ul style="list-style-type: none"> ➤ Click the <i>Summary</i> menu option 	Mark	Purchase Request Name	Purchase Request No.	PR Date	Delivery Date	LI Total	Status	<input type="checkbox"/>	20201105 EX 3 HNT	NA-AJ2000-21-00031	11/05/2020	08/01/2021	2 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 7-2 HNT	NA-AJ2000-21-00041	11/05/2020	09/30/2021	1 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 8-2 HNT	NA-AJ2000-21-00045	11/05/2020	09/30/2021	1 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 9-2 HNT	NA-AJ2000-21-00049	11/05/2020	09/30/2021	3 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 10-2 HNT	NA-AJ2000-21-00053	11/05/2020	12/01/2021	1 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 11-2 HNT	NA-AJ2000-21-00057	11/05/2020	09/30/2021	2 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 12 HNT	NA-AJ2000-21-00059	11/05/2020	09/30/2021	1 Line(s)	Open-Assign	<input type="checkbox"/>	20201105 EX 13 HNT	NA-AJ2000-21-00061	11/05/2020	09/30/2021	1 Line(s)	Open-Assign
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<input type="checkbox"/>	20201105 EX 13 HNT	NA-AJ2000-21-00061	11/05/2020	09/30/2021	1 Line(s)	Open-Assign																																																										
<p>4</p>	<p>The Award Summary screen appears.</p> <ul style="list-style-type: none"> ➤ Click the <i>Line Items</i> menu option 																																																															

Step	Action
<p>5</p>	<p>The Award Line Item Management screen appears.</p>  <p>Notes:</p> <ul style="list-style-type: none"> ✓ The system automatically re-numbers the new lines being consolidated into the lead PR.
<p>6</p>	<ul style="list-style-type: none"> ➤ Check the Checkbox for the “new” CLIN (i.e. 0002) ➤ Click the <i>Delete</i> menu option <p>A pop up window appears:</p> <p>crequesttrain.eas.commerce.gov says</p> <p>Are you sure you want to Delete the selected items? Press 'Ok' to delete. Press 'Cancel' to continue without deleting the items.</p> <div style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </div> <ul style="list-style-type: none"> ➤ Click OK

Step	Action
<p>8</p>	<p>The Delete Options screen will appear:</p> <div style="text-align: center;"> <p>Options</p> <p><input type="radio"/> Delete / Consolidate</p> <p><input type="radio"/> Delete / Open Assign</p> <p><input type="radio"/> Delete / On Solicitation</p> <p><input checked="" type="radio"/> Delete / Cancel</p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p> </div> <p>➤ Select Delete/Cancel</p> <p>➤ Click <i>Save</i></p> <div style="background-color: yellow; padding: 5px;"> <p>Notes:</p> <p>✓ <i>The option of Delete/Consolidate should not be used for NOAA's purposes</i></p> </div>
<p>9</p>	<p>The Award Line Management screen appears and the original line appears.</p>  <p>➤ Click the <i>Line Number</i> to edit (i.e. 0001)</p>

Step	Action
<p>10</p>	<p>The Award Line Detail screen appears.</p>  <p>➤ Edit the Cost to match the original and consolidated line costs (i.e. 11,957.94)</p> <p>➤ Click <i>Apply</i></p> <p>➤ Click the <i>Accounting</i> menu options</p>
<p>11</p>	<p>The Award Line Item Account Code Management screen appears.</p>  <p>➤ Verify whether the Line Item Total and Total Cost are equal, if not do the following:</p> <p>➤ Check the box in front of the line</p> <p>➤ Click the <i>Accounting</i> menu options</p>

Step	Action
<p>11a</p>	<p>The Account Code Detail screen appears:</p>  <p>Account Code Detail</p> <p>Line Item No.: 0001, ONE 150HP OUTBOARD ENGINE. SPECS DESCRIBED IN THE ATTACHED SUPPORT DOCUMENT</p> <p>Accounting Summary Line Items</p> <p>Project (7): 28LEF28</p> <p>Task (3): B00</p> <p>Fund (4): 0001</p> <p>Program (9): 022116001</p> <p>Organization (16): 3021000200000000</p> <p>Object Class (8): 26132535</p> <p>User Defined (6): 000000</p> <p>Allocation By: Cost</p> <p>Percent: 96.10</p> <p>Commit Amount: 11491</p> <p>Cost: 11491</p> <p>Committed Amount: 11,491.00</p> <p>Quantity: 1</p> <p>Go to the bottom of the screen:</p>  <p>Allocation By: Cost</p> <p>Percent: 96.10</p> <p>Commit Amount: 11491</p> <p>Cost: 11491</p> <p>Committed Amount: 11,491.00</p> <p>Quantity: 1</p>
<p>11b</p>	<ul style="list-style-type: none"> ➤ Change the Cost to the Line Item Amount (i.e. 11957.94) ➤ Click <i>Save</i>

Step	Action
11c	<p>The Award Line Item Account Code Management screen appears with the updated information:</p>  <p>➤ Verify the accounting costs have changed</p> <p>➤ Click the <i>Summary</i> menu option</p>
12	<p>Finish processing the award:</p> <ul style="list-style-type: none"> ➤ 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 you are doing a modification to an award, then you should consolidate at the PR level PRIOR to doing the modification.

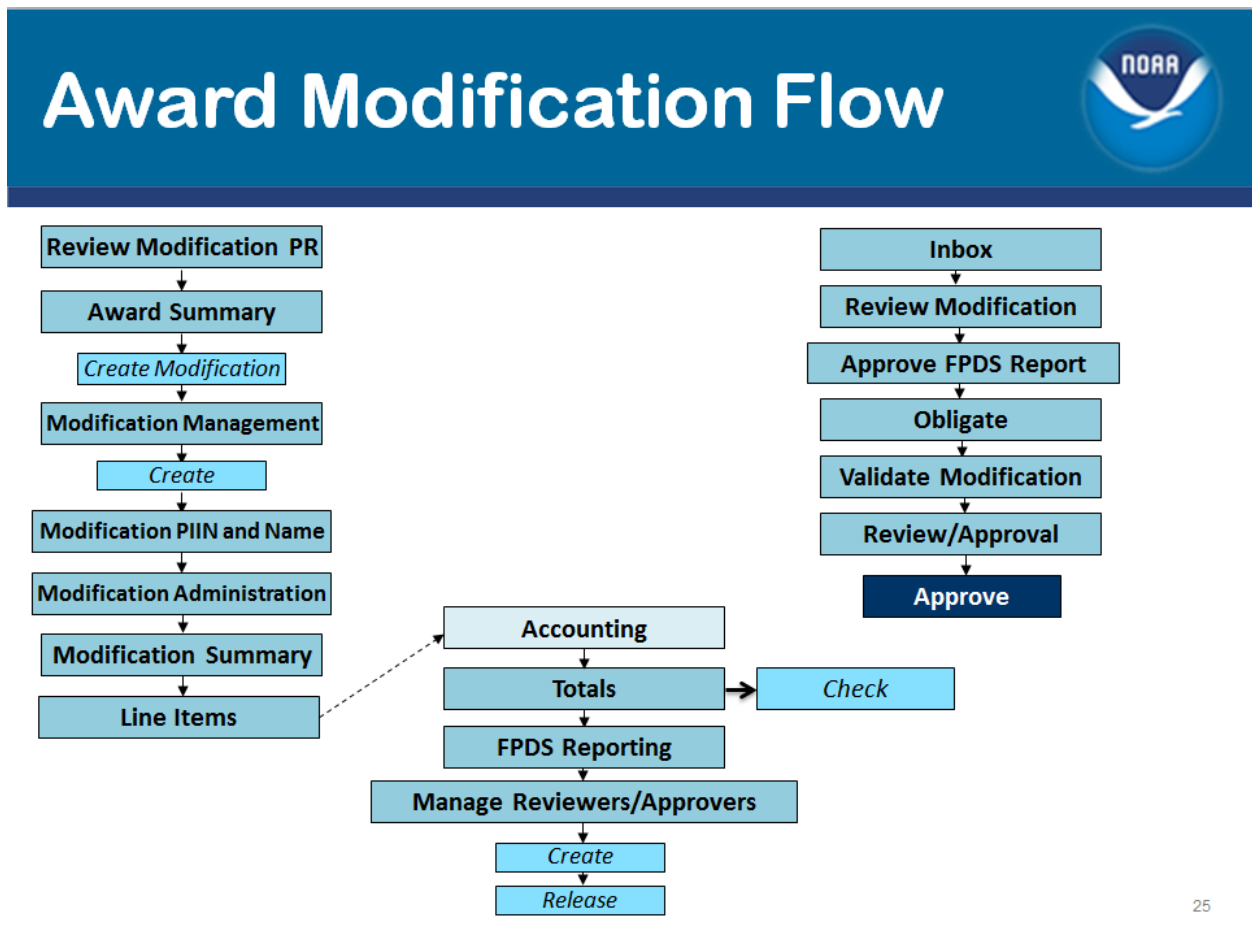
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Exercise #8: Create an Award Modification – De-obligation

Objectives:

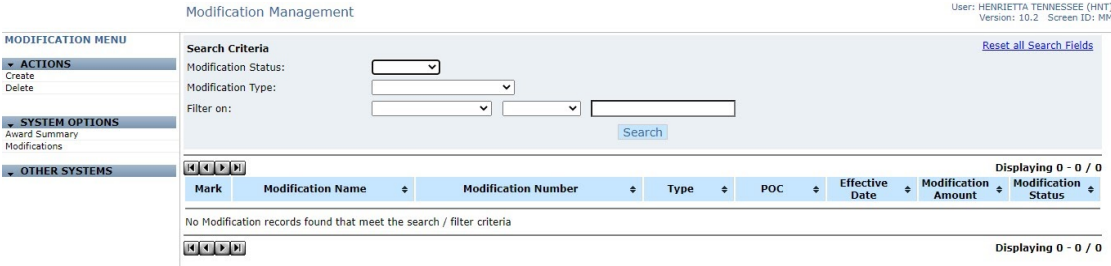
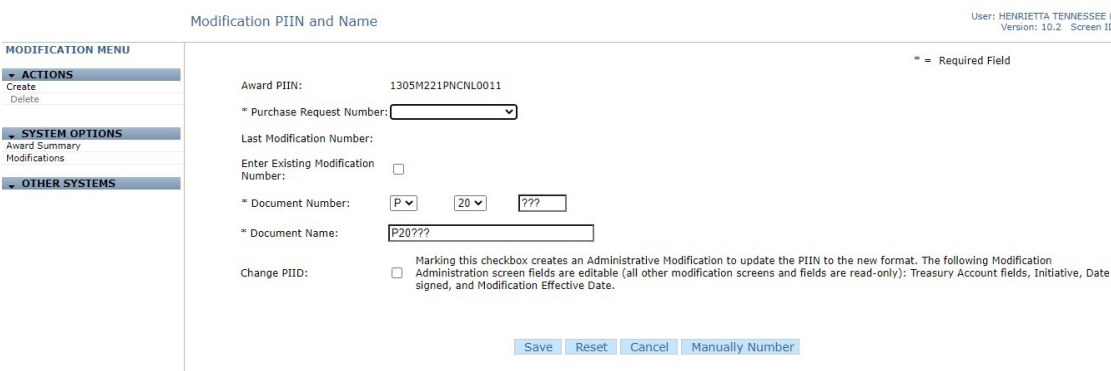
- Navigate through C.Award
- Understand how to do an award modification to de-obligate remaining funds
- Follow the flow chart

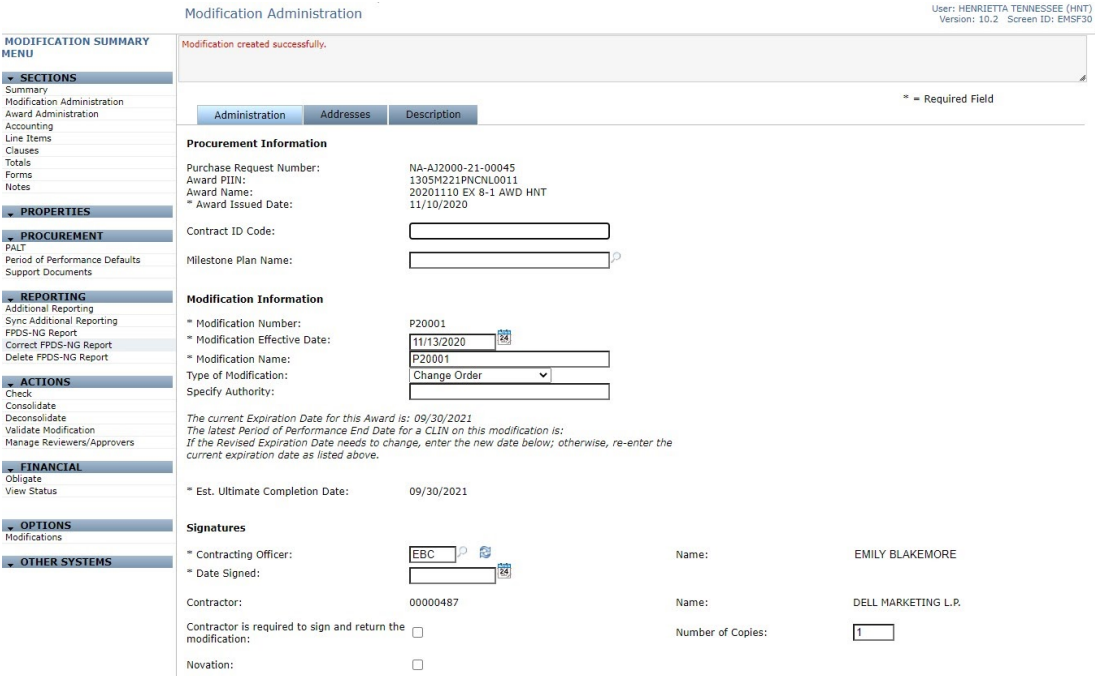
Instructions: Execute the following steps:

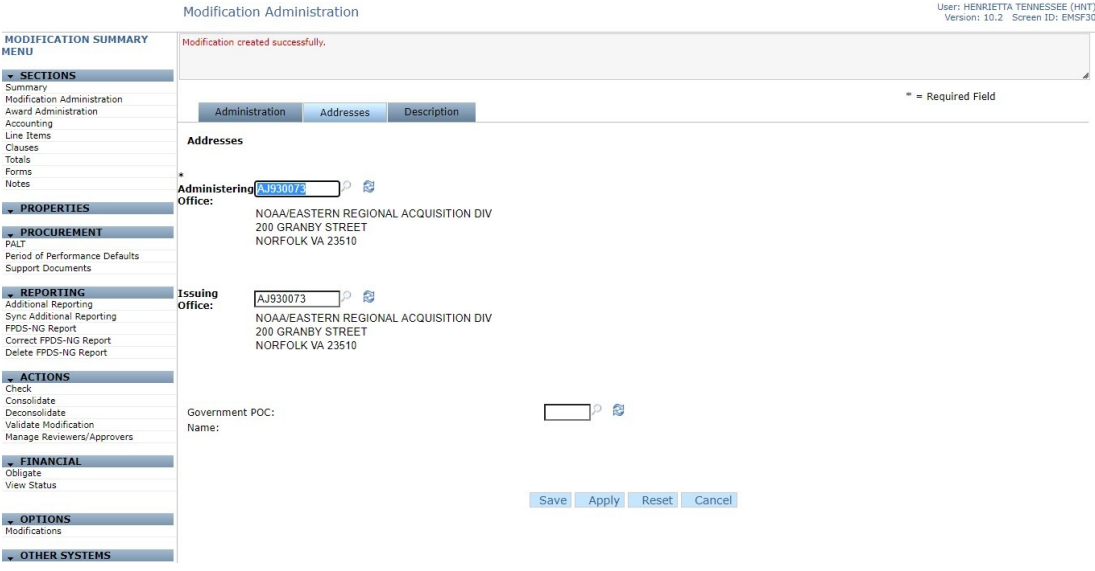


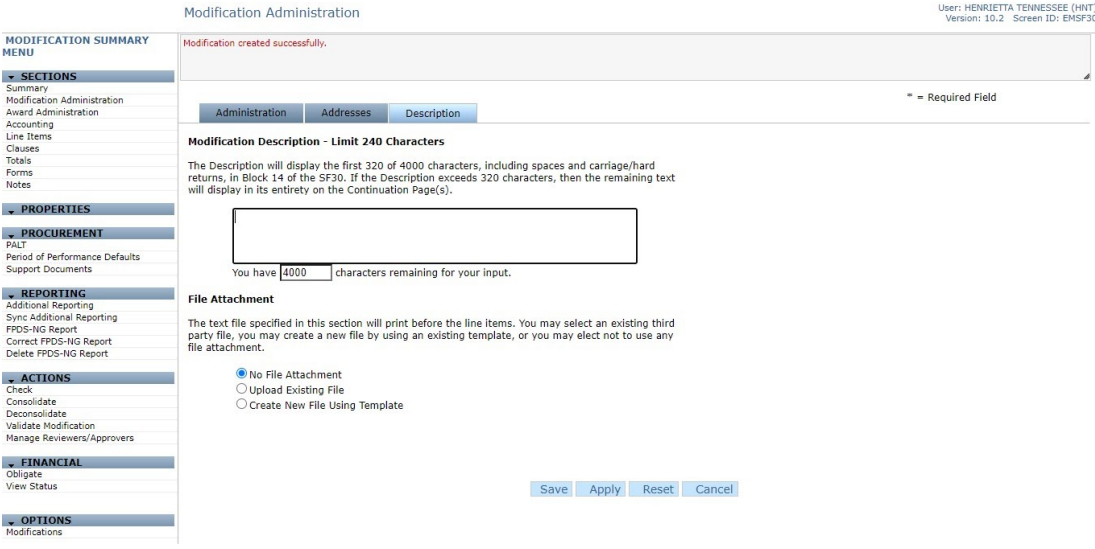
You receive a zero dollar PR. It appears that this is de-obligation. Follow the steps below to create a modification to an award to de-obligate the remaining funds.

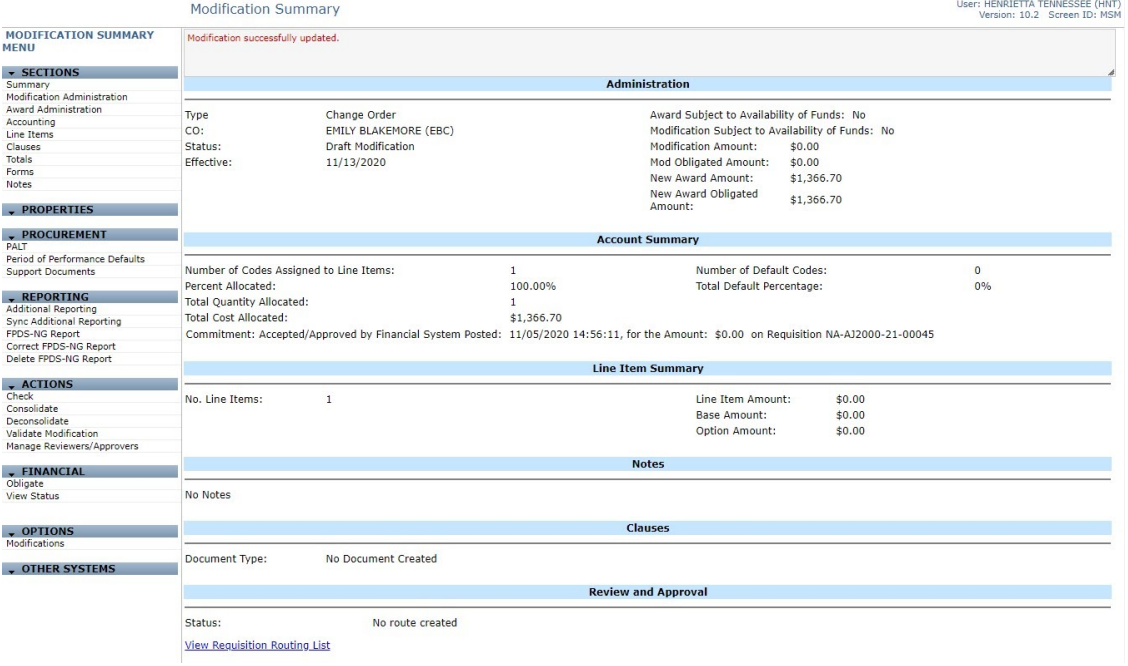
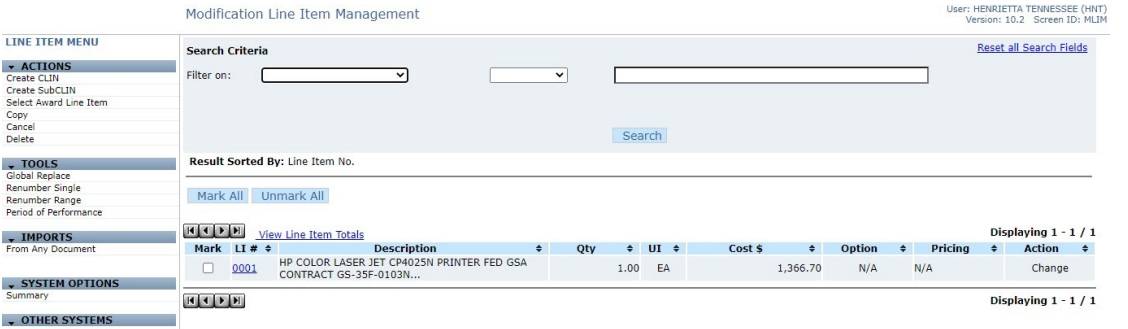
Step	Action																																																																																																								
1	<p>You receive the PR: Do the following:</p> <ul style="list-style-type: none"> ➤ Review the new PR, making note of the Accounting, PR #, amount, Modification LI Action, etc. 																																																																																																								
2	<p>Open the award that needs to be de-obligated. This can be done from the following view tabs:</p> <ul style="list-style-type: none"> ➤ Hotlist ➤ Recently Accessed ➤ Worksheet 																																																																																																								
3	<p>The Award Summary screen appears:</p> <div style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> Award Summary User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: ASM </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">AWARD SUMMARY MENU</th> <th colspan="3">Administration</th> </tr> </thead> <tbody> <tr> <td>SECTIONS</td> <td colspan="3"> <table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Award Type:</td> <td>Purchase Order/Priced</td> <td style="width: 33%;">Ordering Source:</td> <td>Open Market</td> </tr> <tr> <td>National Interest:</td> <td>N/A</td> <td>Award Subject to Availability of Funds:</td> <td>No</td> </tr> <tr> <td>Vendor:</td> <td>DELL MARKETING L.P. (00000487)</td> <td>Award Amount:</td> <td>\$1,366.70</td> </tr> <tr> <td>CO:</td> <td>EMILY BLAKEMORE (EBC)</td> <td>Obligated Amount:</td> <td>\$1,366.70</td> </tr> <tr> <td>* COR: If not required select NCR-No COR Required</td> <td>ERIN K COBBS (EKC)</td> <td>Document Status:</td> <td>Award Issued 11/10/2020 15:01:00</td> </tr> <tr> <td>Issued By:</td> <td colspan="3">HENRIETTA TENNESSEE (HNT)</td> </tr> <tr> <td>Procurement Status:</td> <td colspan="3">Fully Awarded</td> </tr> </table> </td> </tr> <tr> <td>PROPERTIES</td> <td colspan="3">Account Summary</td> </tr> <tr> <td>Number of Codes Assigned to Line Items:</td> <td>1</td> <td>Number of Default Codes:</td> <td>0</td> </tr> <tr> <td>Percent Allocated:</td> <td>100.00%</td> <td>Total Default Percentage:</td> <td>0%</td> </tr> <tr> <td>Total Quantity Allocated:</td> <td>1</td> <td colspan="2">Commitment: Accepted/Approved by Financial System Posted: 11/05/2020 14:55:20, for the Amount: \$1,366.70 on Requisition NA-AJ2000-21-00043</td> </tr> <tr> <td>Total Cost Allocated:</td> <td>\$1,366.70</td> <td colspan="2">Obligation: Accepted/Approved by Financial System Posted: 11/10/2020 14:55:20, for the Amount: \$1,366.70 on Award 1305M221PNCNL0011</td> </tr> <tr> <td>REPORTING</td> <td colspan="3">Line Item Summary</td> </tr> <tr> <td>No. Line Items:</td> <td>1</td> <td>Total Amount:</td> <td>\$1,366.70</td> </tr> <tr> <td></td> <td></td> <td>Base Amount:</td> <td>\$1,366.70</td> </tr> <tr> <td></td> <td></td> <td>Option Amount:</td> <td>\$0.00</td> </tr> <tr> <td>ACTIONS</td> <td colspan="3">Notes</td> </tr> <tr> <td></td> <td colspan="3">No Notes</td> </tr> <tr> <td>VENDOR</td> <td colspan="3">Clauses</td> </tr> <tr> <td>Document Type:</td> <td colspan="3">No Document Created</td> </tr> <tr> <td>FINANCIAL</td> <td colspan="3">Review and Approval</td> </tr> <tr> <td>Status:</td> <td colspan="3">No route created</td> </tr> <tr> <td>CREATE</td> <td colspan="3">View Requisition Routing List</td> </tr> <tr> <td>SYSTEM OPTIONS</td> <td colspan="3"></td> </tr> </tbody> </table> </div> <ul style="list-style-type: none"> ➤ Verify you have the correct award ➤ Click the <i>Modifications</i> menu option 	AWARD SUMMARY MENU	Administration			SECTIONS	<table border="0" style="width: 100%;"> <tr> <td style="width: 33%;">Award Type:</td> <td>Purchase Order/Priced</td> <td style="width: 33%;">Ordering Source:</td> <td>Open Market</td> </tr> <tr> <td>National Interest:</td> <td>N/A</td> <td>Award Subject to Availability of Funds:</td> <td>No</td> </tr> <tr> <td>Vendor:</td> <td>DELL MARKETING L.P. 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Step	Action
<p>4</p>	<p>The Modification Management screen appears:</p>  <p>➤ Click the <i>Create</i> menu option</p>
<p>5</p>	<p>The Modification PIIN and Name screen appears:</p>  <p>➤ Use the drop-down list to choose the PR#</p> <p>➤ Click <i>Save</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>In the new PIID structure you will leave the Document Number and Name as system generated.</i>

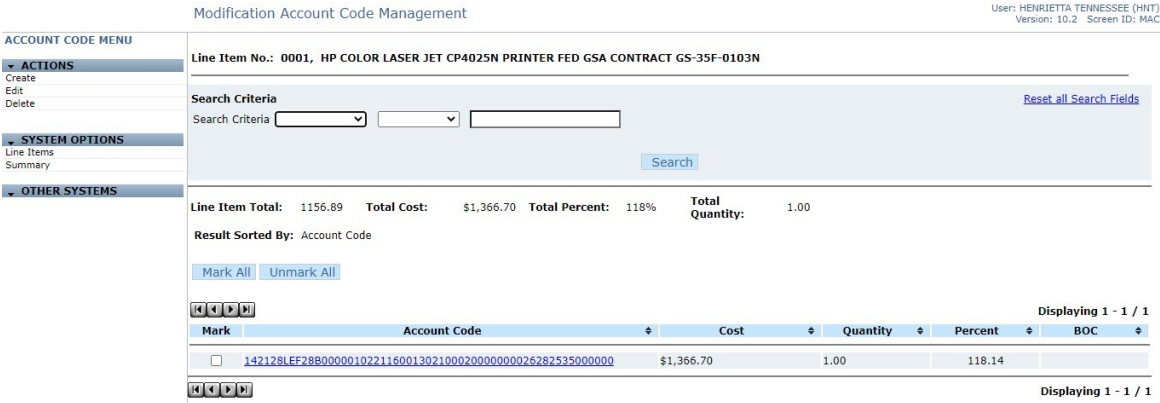
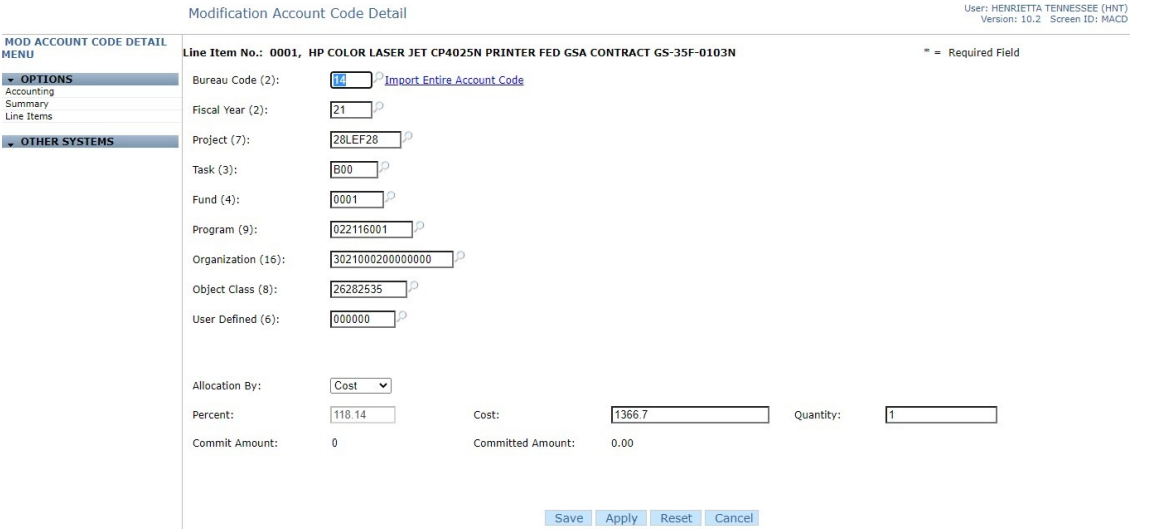
Step	Action
<p>6</p>	<p>The Modification Administration screen appears:</p>  <p>The screenshot shows the 'Modification Administration' screen with a navigation menu on the left and a main content area. The main content area has three tabs: 'Administration', 'Addresses', and 'Description'. The 'Administration' tab is active. The screen displays various fields for entering modification details, including Procurement Information (Purchase Request Number, Award PIIN, Award Name, Award Issued Date), Modification Information (Modification Number, Modification Effective Date, Modification Name, Type of Modification, Specify Authority), and Signatures (Contracting Officer, Date Signed, Contractor, Contractor is required to sign and return the modification, Novation). There are also fields for Est. Ultimate Completion Date and Number of Copies. A message at the top indicates 'Modification created successfully.'</p> <ul style="list-style-type: none"> ➤ Enter the Date Signed (i.e. current date) ➤ Click the <i>Address</i> tab
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>The contractor only has to sign a modification if it affects their contract, like additional requirements.</i> ✓ <i>Things like de-obligations mean the award is finished and so the contractor doesn't have to sign a copy.</i>

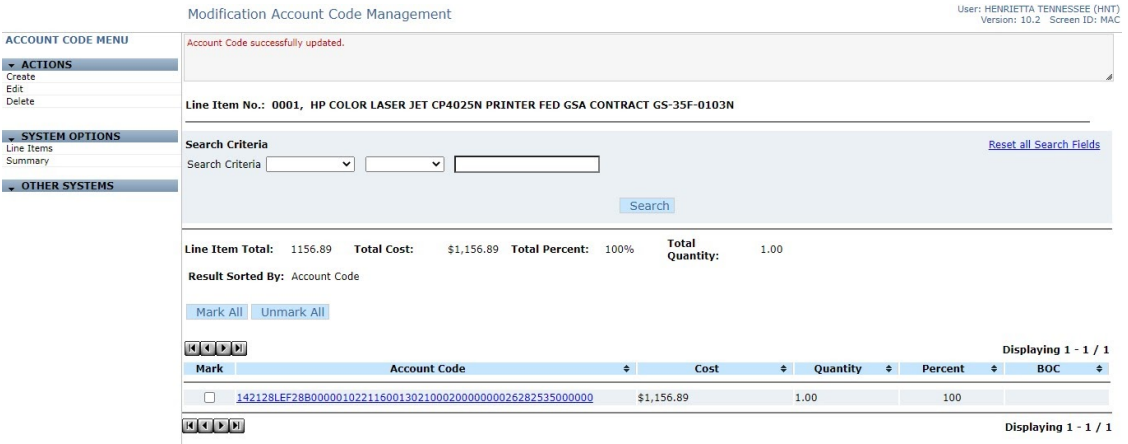
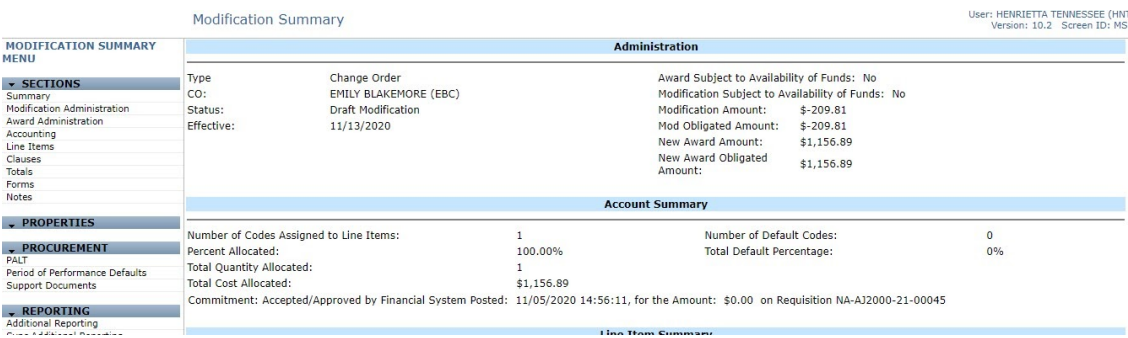
Step	Action
<p>6a</p>	<p>The <i>Address</i> view tab appears:</p>  <ul style="list-style-type: none"> ➤ Enter Government POC (i.e. training ID) ➤ Click the <i>refresh</i> icon ➤ Click the <i>Description</i> tab

Step	Action
<p>6b</p>	<p>The <i>Description</i> view tab appears:</p>  <p>Modification Administration User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: EMSF30</p> <p>MODIFICATION SUMMARY MENU</p> <p>Modification created successfully.</p> <p>SECTIONS</p> <ul style="list-style-type: none"> Summary Modification Administration Award Administration Accounting Line Items Clauses Tables Forms Notes <p>PROPERTIES</p> <p>PROCUREMENT</p> <ul style="list-style-type: none"> PALT Period of Performance Defaults Support Documents <p>REPORTING</p> <ul style="list-style-type: none"> Additional Reporting Sync Additional Reporting FPDS-NG Report Correct FPDS-NG Report Delete FPDS-NG Report <p>ACTIONS</p> <ul style="list-style-type: none"> Check Consolidate Deconsolidate Validate Modification Manage Reviewers/Approvers <p>FINANCIAL</p> <ul style="list-style-type: none"> Obligate View Status <p>OPTIONS</p> <ul style="list-style-type: none"> Modifications <p>Administration Addresses Description * = Required Field</p> <p>Modification Description - Limit 240 Characters</p> <p>The Description will display the first 320 of 4000 characters, including spaces and carriage/hard returns, in Block 14 of the SF30. If the Description exceeds 320 characters, then the remaining text will display in its entirety on the Continuation Page(s).</p> <p>You have <input type="text" value="4000"/> characters remaining for your input.</p> <p>File Attachment</p> <p>The text file specified in this section will print before the line items. You may select an existing third party file, you may create a new file by using an existing template, or you may elect not to use any file attachment.</p> <p> <input checked="" type="radio"/> No File Attachment <input type="radio"/> Upload Existing File <input type="radio"/> Create New File Using Template </p> <p>Save Apply Reset Cancel</p> <p>➤ Enter a description (i.e. THIS MODIFICATION IS ISSUED TO DE-OBLIGATE REMAINING FUNDS ON AN AWARD READY TO BE CLOSED OUT)</p> <p>➤ Click <i>Save</i></p>

Step	Action																		
<p>7</p>	<p>The Modification Summary screen appears with a message that the modification was successfully updated.</p>  <p>Modification Summary</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: MSM</p> <p>MODIFICATION SUMMARY MENU</p> <p>SECTIONS</p> <ul style="list-style-type: none"> Summary Modification Administration Award Administration Accounting Line Items Clauses Totals Forms Notes <p>PROPERTIES</p> <p>PROCUREMENT</p> <ul style="list-style-type: none"> PALT Period of Performance Defaults Support Documents <p>REPORTING</p> <ul style="list-style-type: none"> Additional Reporting Sync Additional Reporting FPDS-NG Report Correct FPDS-NG Report Delete FPDS-NG Report <p>ACTIONS</p> <ul style="list-style-type: none"> Check Consolidate Deconsolidate Validate Modification Manage Reviewers/Approvers <p>FINANCIAL</p> <ul style="list-style-type: none"> Obligate View Status <p>OPTIONS</p> <ul style="list-style-type: none"> Modifications <p>OTHER SYSTEMS</p> <p>Modification successfully updated.</p> <p>Administration</p> <p>Type: Change Order CO: EMILY BLAKEMORE (EBC) Status: Draft Modification Effective: 11/13/2020</p> <p>Award Subject to Availability of Funds: No Modification Subject to Availability of Funds: No Modification Amount: \$0.00 Mod Obligated Amount: \$0.00 New Award Amount: \$1,366.70 New Award Obligated Amount: \$1,366.70</p> <p>Account Summary</p> <p>Number of Codes Assigned to Line Items: 1 Percent Allocated: 100.00% Total Quantity Allocated: 1 Total Cost Allocated: \$1,366.70</p> <p>Number of Default Codes: 0 Total Default Percentage: 0%</p> <p>Commitment: Accepted/Approved by Financial System Posted: 11/05/2020 14:56:11, for the Amount: \$0.00 on Requisition NA-AJ2000-21-00045</p> <p>Line Item Summary</p> <p>No. Line Items: 1 Line Item Amount: \$0.00 Base Amount: \$0.00 Option Amount: \$0.00</p> <p>Notes</p> <p>No Notes</p> <p>Clauses</p> <p>Document Type: No Document Created</p> <p>Review and Approval</p> <p>Status: No route created View Requisition Routing List</p> <p>➤ Click on <i>Line Items</i> menu option</p>																		
<p>8</p>	<p>The Modification Line Item Management screen appears:</p>  <p>Modification Line Item Management</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: MLDM</p> <p>LINE ITEM MENU</p> <ul style="list-style-type: none"> ACTIONS <ul style="list-style-type: none"> Create CLIN Create SubCLIN Select Award Line Item Copy Cancel Delete TOOLS <ul style="list-style-type: none"> Global Replace Renumber Single Renumber Range Period of Performance IMPORTS <ul style="list-style-type: none"> From Any Document SYSTEM OPTIONS <ul style="list-style-type: none"> Summary OTHER SYSTEMS <p>Search Criteria Reset all Search Fields</p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/></p> <p><input type="button" value="Search"/></p> <p>Result Sorted By: Line Item No.</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p><input type="button" value="View Line Item Totals"/></p> <table border="1"> <thead> <tr> <th>Mark</th> <th>LI #</th> <th>Description</th> <th>Qty</th> <th>UI</th> <th>Cost \$</th> <th>Option</th> <th>Pricing</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0001</td> <td>HP COLOR LASER JET CP4025N PRINTER FED GSA CONTRACT GS-35F-0103N...</td> <td>1.00</td> <td>EA</td> <td>1,366.70</td> <td>N/A</td> <td>N/A</td> <td>Change</td> </tr> </tbody> </table> <p>Displaying 1 - 1 / 1</p> <p>➤ Click the <i>Line Item</i></p>	Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Action	<input type="checkbox"/>	0001	HP COLOR LASER JET CP4025N PRINTER FED GSA CONTRACT GS-35F-0103N...	1.00	EA	1,366.70	N/A	N/A	Change
Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Action											
<input type="checkbox"/>	0001	HP COLOR LASER JET CP4025N PRINTER FED GSA CONTRACT GS-35F-0103N...	1.00	EA	1,366.70	N/A	N/A	Change											

Step	Action
9	<p>The Modification Line Item Detail appears with the original award line item displayed.</p> <div style="border: 1px solid #ccc; padding: 10px;"> <p style="text-align: right; font-size: small;">User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: MLIID</p> <p style="text-align: right;">* = Required Field</p> <p>Modification Line Item Detail</p> <hr/> <p>LINE ITEM DETAIL MENU</p> <ul style="list-style-type: none"> ▼ TOOLS <ul style="list-style-type: none"> Accounting ▼ ACTIONS <ul style="list-style-type: none"> Create SubCLIN ▼ SYSTEM OPTIONS <ul style="list-style-type: none"> Summary Line Items ▼ OTHER SYSTEMS <p style="text-align: center; margin-top: 10px;">Administration Address Option Pricing Arrangements Receiving</p> <hr/> <p>* Line Item No: 0001 * UI: EA * Cost: 1366.7 * Qty: <input type="text"/> * Total Cost: \$ 1,366.70</p> <p>Header: <input type="text"/> Is this a "green" TEST2 acquisition?: <input type="text"/></p> <p>You have <input type="text"/> characters remaining for your input. "Green" TEST2 Justification: <input type="text"/></p> <p>Description: HP COLOR LASER JET CP4025N PRINTER FED GSA CONTRACT GS-35F-0103N "Green" TEST2 Reason: <input type="text"/></p> <p>You have <input type="text"/> characters remaining for your input. You have <input type="text"/> characters remaining for your input.</p> <p>Contract Type: <input type="text"/></p> <p>Not to Exceed: <input type="text"/></p> <p>* UNSPSC Code: 44101714 Facsimile units for office machines Not Separately Priced: <input type="checkbox"/></p> <p>UNSPSC Title: Stock Item: <input type="text"/></p> <p>* FSC Code: 7490 MISCELLANEOUS OFFICE MACHINES</p> <p>FSC Description:</p> <p>Award Purchase Request Number: NA-AJ2000-21-00043</p> <p>Award Purchase Request Line Item Number: 0001</p> <p>Modification Purchase Request Number: NA-AJ2000-21-00045</p> <p>Modification Purchase Request Line Item Number: 0001</p> <p>Modification Action: Change</p> <p>Funding Goal: Fully Funded</p> <p style="text-align: right; margin-top: 10px;"> <input type="button" value="Save"/> <input type="button" value="Apply"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> </p> </div>
	<ul style="list-style-type: none"> ➤ Change the Cost to the amount paid (i.e. 1156.89) ➤ Click <i>Apply</i> ➤ Click the <i>Accounting</i> menu option

Step	Action
<p>11</p>	<p>The Award Line Item Account Code Management screen appears.</p>  <ul style="list-style-type: none"> ➤ Verify whether the Line Item Total and Total Cost are equal, if not do the following: ➤ Check the box in front of the line ➤ Click the <i>Edit</i> menu option
<p>11a</p>	<p>The Account Code Detail screen appears:</p> 
<p>11b</p>	<p>Go to the bottom of the screen:</p> <ul style="list-style-type: none"> ➤ Change the Cost to the Line Item Amount (i.e. 1156.89) ➤ Click <i>Save</i>

Step	Action
<p>11c</p>	<p>The Award Line Item Account Code Management screen appears with the updated information:</p>  <p>➤ Verify the accounting costs have changed</p> <p>➤ Click the <i>Summary</i> menu option</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Reminder the total cost will not change on the accounting if it was set up by cost or quantity so the amount will need to be updated.</i>
<p>12</p>	<p>The Modification Summary screen appears:</p>  <p>➤ Verify the paid amounts and de-obligation amounts match what was sent over</p> <p>➤ Click the <i>Manage Reviewers/Approvers</i> menu option</p>

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ For training purposes the FPDS Reporting checkbox in Totals is unchecked ✓ In production the next step would be to update the FPDS Report
14	<p>The Modification Review & Approval Management screen appears:</p> <ul style="list-style-type: none"> ➤ Click the <i>Add User</i> menu option
15	<p>The Reviewer Detail screen appears:</p> <ul style="list-style-type: none"> ➤ Enter the Reviewer (i.e. EBC) ➤ Click <i>Save</i>
16	<p>The Modification Review & Approval Management screen appears with the approver listed:</p> <ul style="list-style-type: none"> ➤ Click the <i>Release</i> menu option <p>The status should now be Review Pending.</p> <ul style="list-style-type: none"> ➤ Click Home
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ The Contracting Officer will review the modification and either approve or disapprove.

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

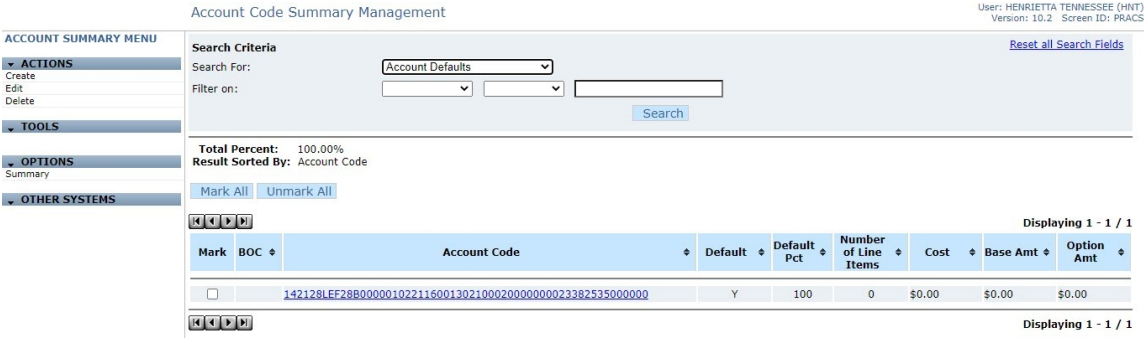
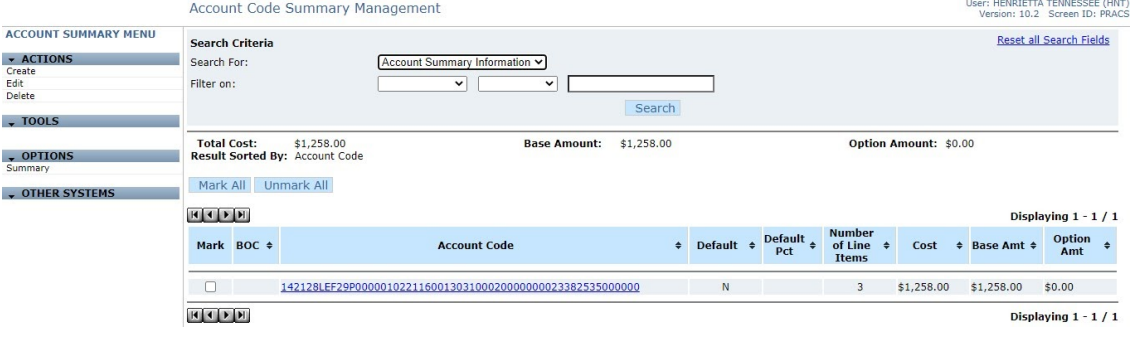
Objectives:


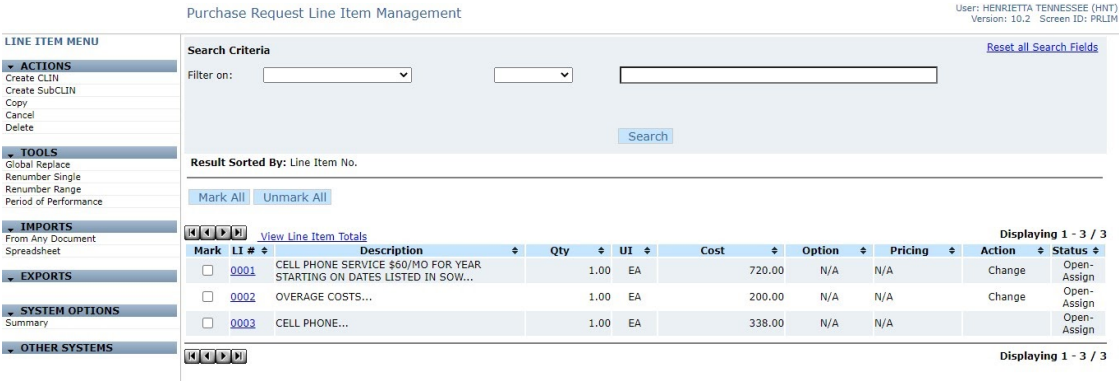
- Navigate through C.Award
- Create an Award Modification
- Understand what the PR needs to contain
- Learn how to modify accounting
- Follow flow chart

Instructions: Execute the following steps:

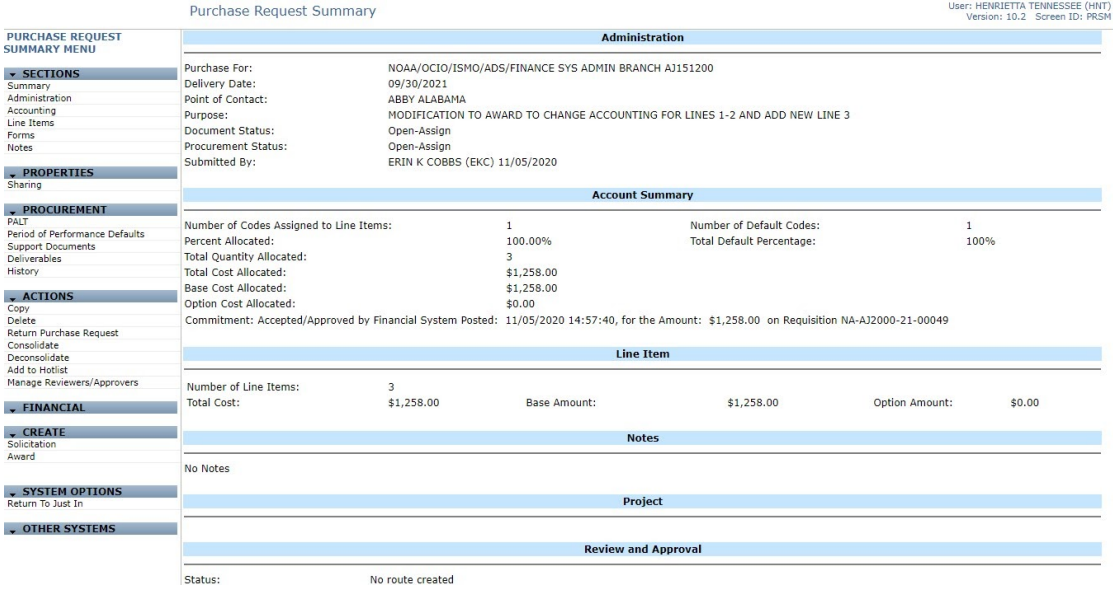
An Award that has already been obligated and issued needs a modification. This modification is to change the ACCS associated with the original lines and adds an additional line that will add money to the award.

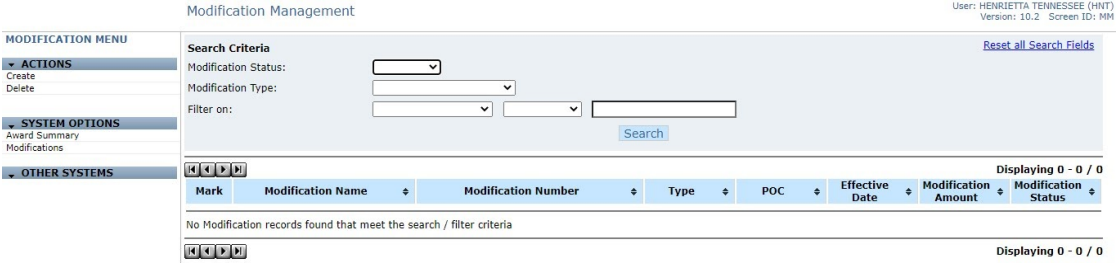

Step	Action
1	From the <i>Just In</i> tab. ➤ Click the <i>PR#</i>
2	The Purchase Request Summary screen appears:  <p>The screenshot shows the 'Purchase Request Summary' screen with a sidebar menu on the left and a main content area. The sidebar menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, ACTIONS, FINANCIAL, CREATE, SYSTEM OPTIONS, and OTHER SYSTEMS. The main content area is divided into several sections: Administration (with fields for Purchase For, Delivery Date, Point of Contact, Purpose, Document Status, Procurement Status, and Submitted By), Account Summary (with fields for Number of Codes Assigned to Line Items, Percent Allocated, Total Quantity Allocated, Total Cost Allocated, Base Cost Allocated, and Option Cost Allocated), Line Item (with fields for Number of Line Items and Total Cost), Notes (with a 'No Notes' message), Project, and Review and Approval (with a 'Status: No route created' message).</p> ➤ Click the <i>Accounting</i> menu option

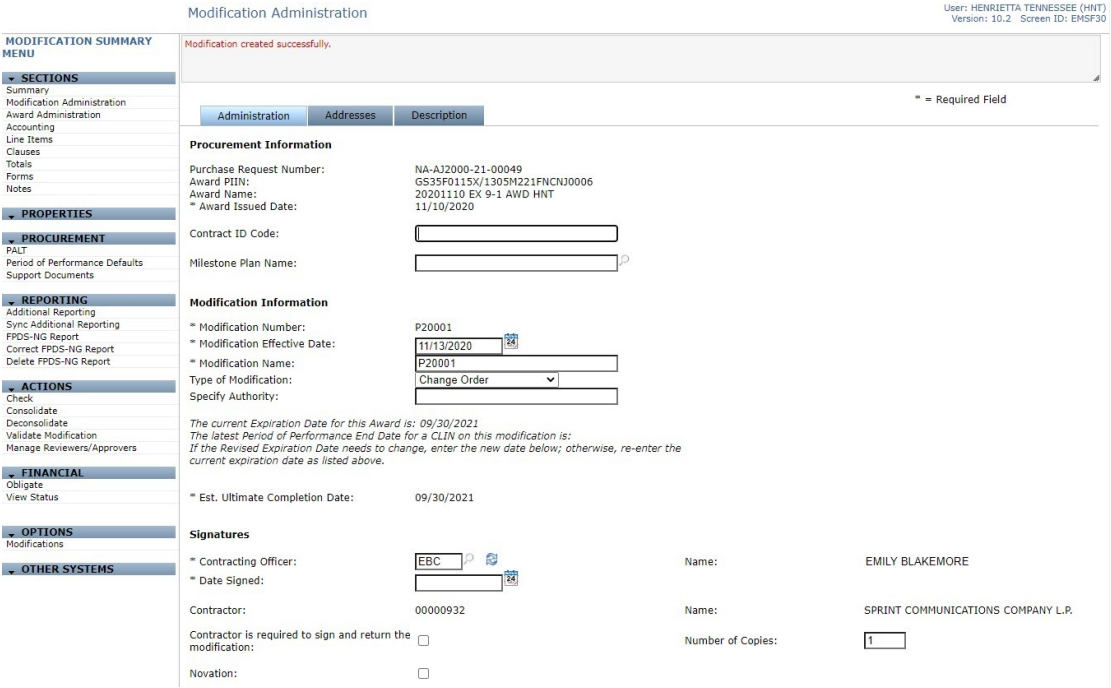
Step	Action																																				
<p>3</p>	<p>The Account Code Summary Management screen appears:</p>  <p>Account Code Summary Management</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: PRACS</p> <p>ACCOUNT SUMMARY MENU</p> <ul style="list-style-type: none"> ACCTIONS <ul style="list-style-type: none"> Create Edit Delete TOOLS OPTIONS <ul style="list-style-type: none"> Summary OTHER SYSTEMS <p>Search Criteria</p> <p>Search For: <input type="text" value="Account Defaults"/> Reset all Search Fields</p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/> <input type="button" value="Search"/></p> <p>Total Percent: 100.00% Result Sorted By: Account Code</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p>Displaying 1 - 1 / 1</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>BOC</th> <th>Account Code</th> <th>Default</th> <th>Default Pct</th> <th>Number of Line Items</th> <th>Cost</th> <th>Base Amt</th> <th>Option Amt</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>142128LEF28B000001022116001302100020000000023382535000000</td> <td>Y</td> <td>100</td> <td>0</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> </tr> </tbody> </table> <p>Displaying 1 - 1 / 1</p> <p>➤ Take note of the accounting used for both Default and Summary</p>  <p>Account Code Summary Management</p> <p>User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: PRACS</p> <p>ACCOUNT SUMMARY MENU</p> <ul style="list-style-type: none"> ACCTIONS <ul style="list-style-type: none"> Create Edit Delete TOOLS OPTIONS <ul style="list-style-type: none"> Summary OTHER SYSTEMS <p>Search Criteria</p> <p>Search For: <input type="text" value="Account Summary Information"/> Reset all Search Fields</p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/> <input type="button" value="Search"/></p> <p>Total Cost: \$1,258.00 Base Amount: \$1,258.00 Option Amount: \$0.00 Result Sorted By: Account Code</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p>Displaying 1 - 1 / 1</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>BOC</th> <th>Account Code</th> <th>Default</th> <th>Default Pct</th> <th>Number of Line Items</th> <th>Cost</th> <th>Base Amt</th> <th>Option Amt</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td></td> <td>142128LEF29P000001022116001303100020000000023382535000000</td> <td>N</td> <td></td> <td>3</td> <td>\$1,258.00</td> <td>\$1,258.00</td> <td>\$0.00</td> </tr> </tbody> </table> <p>Displaying 1 - 1 / 1</p> <p>➤ Click the <i>Summary</i> menu option</p>	Mark	BOC	Account Code	Default	Default Pct	Number of Line Items	Cost	Base Amt	Option Amt	<input type="checkbox"/>		142128LEF28B000001022116001302100020000000023382535000000	Y	100	0	\$0.00	\$0.00	\$0.00	Mark	BOC	Account Code	Default	Default Pct	Number of Line Items	Cost	Base Amt	Option Amt	<input type="checkbox"/>		142128LEF29P000001022116001303100020000000023382535000000	N		3	\$1,258.00	\$1,258.00	\$0.00
Mark	BOC	Account Code	Default	Default Pct	Number of Line Items	Cost	Base Amt	Option Amt																													
<input type="checkbox"/>		142128LEF28B000001022116001302100020000000023382535000000	Y	100	0	\$0.00	\$0.00	\$0.00																													
Mark	BOC	Account Code	Default	Default Pct	Number of Line Items	Cost	Base Amt	Option Amt																													
<input type="checkbox"/>		142128LEF29P000001022116001303100020000000023382535000000	N		3	\$1,258.00	\$1,258.00	\$0.00																													
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ Reviewing the default accounting will show what the original line(s) had on the award ✓ Reviewing the Account Summary accounting will show what the line(s) that are changing ✓ Reviewing and keeping this information is important because when doing modifications the accounting will pull from the original award and it will need to be changed to what the office wants to change it to now 																																				

Step	Action																																								
<p>4</p>	<p>The Purchase Request Summary screen appears:</p>  <p>Purchase Request Summary User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: PRSM</p> <p>PURCHASE REQUEST SUMMARY MENU</p> <ul style="list-style-type: none"> SECTIONS <ul style="list-style-type: none"> Summary Administration Accounting Line Items Forms Notes PROPERTIES <ul style="list-style-type: none"> Sharing PROCUREMENT <ul style="list-style-type: none"> PALT Period of Performance Defaults Support Documents Deliverables History ACTIONS <ul style="list-style-type: none"> Copy Delete Return Purchase Request Consolidate Deconsolidate Add to Hotlist Manage Reviewers/Approvers FINANCIAL CREATE <ul style="list-style-type: none"> Solicitation Award SYSTEM OPTIONS <ul style="list-style-type: none"> Return To Just In OTHER SYSTEMS <p>Administration</p> <p>Purchase For: NOAA/OCIO/ISMO/ADS/FINANCE SYS ADMIN BRANCH AJ151200 Delivery Date: 09/30/2021 Point of Contact: ABBY ALABAMA Purpose: MODIFICATION TO AWARD TO CHANGE ACCOUNTING FOR LINES 1-2 AND ADD NEW LINE 3 Document Status: Open-Assign Procurement Status: Open-Assign Submitted By: ERIN K COBBS (EKC) 11/05/2020</p> <p>Account Summary</p> <p>Number of Codes Assigned to Line Items: 1 Number of Default Codes: 1 Percent Allocated: 100.00% Total Default Percentage: 100% Total Quantity Allocated: 3 Total Cost Allocated: \$1,258.00 Base Cost Allocated: \$1,258.00 Option Cost Allocated: \$0.00 Commitment: Accepted/Approved by Financial System Posted: 11/05/2020 14:57:40, for the Amount: \$1,258.00 on Requisition NA-AJ2000-21-00049</p> <p>Line Item</p> <p>Number of Line Items: 3 Total Cost: \$1,258.00 Base Amount: \$1,258.00 Option Amount: \$0.00</p> <p>Notes</p> <p>No Notes</p> <p>Project</p> <p>Review and Approval</p> <p>Status: No route created</p> <p>➤ Click the <i>Line Items</i> menu option</p>																																								
<p>5</p>	<p>The Purchase Request Line Item Management screen appears:</p>  <p>Purchase Request Line Item Management User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: PRLIM</p> <p>LINE ITEM MENU</p> <ul style="list-style-type: none"> ACTIONS <ul style="list-style-type: none"> Create CLIN Create SubCLIN Copy Cancel Delete TOOLS <ul style="list-style-type: none"> Global Replace Re-number Single Re-number Range Period of Performance IMPORTS <ul style="list-style-type: none"> From Any Document Spreadsheet EXPORTS SYSTEM OPTIONS <ul style="list-style-type: none"> Summary OTHER SYSTEMS <p>Search Criteria Reset all Search Fields</p> <p>Filter on: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/></p> <p><input type="button" value="Search"/></p> <p>Result Sorted By: Line Item No.</p> <p><input type="button" value="Mark All"/> <input type="button" value="Unmark All"/></p> <p><input type="button" value="View Line Item Totals"/> Displaying 1 - 3 / 3</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>LI #</th> <th>Description</th> <th>Qty</th> <th>UI</th> <th>Cost</th> <th>Option</th> <th>Pricing</th> <th>Action</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0001</td> <td>CELL PHONE SERVICE \$60/MO FOR YEAR STARTING ON DATES LISTED IN SOW...</td> <td>1.00</td> <td>EA</td> <td>720.00</td> <td>N/A</td> <td>N/A</td> <td>Change</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0002</td> <td>OVERAGE COSTS...</td> <td>1.00</td> <td>EA</td> <td>200.00</td> <td>N/A</td> <td>N/A</td> <td>Change</td> <td>Open-Assign</td> </tr> <tr> <td><input type="checkbox"/></td> <td>0003</td> <td>CELL PHONE...</td> <td>1.00</td> <td>EA</td> <td>338.00</td> <td>N/A</td> <td>N/A</td> <td>Change</td> <td>Open-Assign</td> </tr> </tbody> </table> <p><input type="button" value="View Line Item Totals"/> Displaying 1 - 3 / 3</p> <p>➤ View the status under Action column ➤ Click <i>Line Item</i></p>	Mark	LI #	Description	Qty	UI	Cost	Option	Pricing	Action	Status	<input type="checkbox"/>	0001	CELL PHONE SERVICE \$60/MO FOR YEAR STARTING ON DATES LISTED IN SOW...	1.00	EA	720.00	N/A	N/A	Change	Open-Assign	<input type="checkbox"/>	0002	OVERAGE COSTS...	1.00	EA	200.00	N/A	N/A	Change	Open-Assign	<input type="checkbox"/>	0003	CELL PHONE...	1.00	EA	338.00	N/A	N/A	Change	Open-Assign
Mark	LI #	Description	Qty	UI	Cost	Option	Pricing	Action	Status																																
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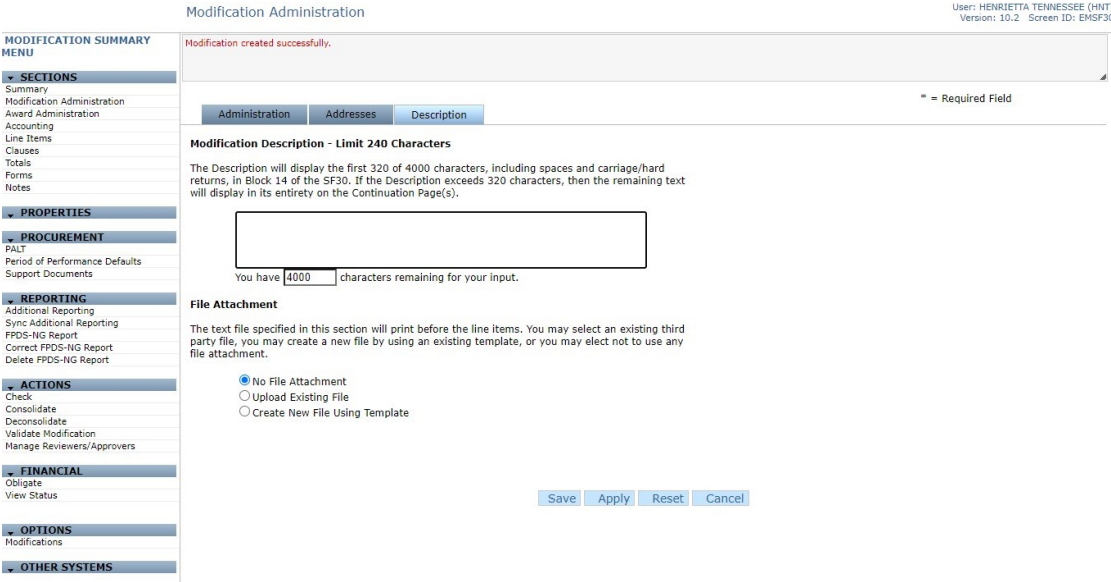
Step	Action
6	<p>The Purchase Request Line Item Detail screen appears:</p> <ul style="list-style-type: none">➤ Review the Administration Tab➤ Verify the Modification LI Action field (i.e. Change Award Line Item for lines 1 & 2, blank for 3)➤ Make any necessary changes➤ Click <i>Apply</i>➤ Click the <i>Accounting</i> menu option
7	<p>The Account Code Management screen appears:</p> <ul style="list-style-type: none">➤ Take note of the accounting (<i>should be the new accounting</i>)➤ Click the <i>Line Items</i> menu option
8	<p>The Purchase Request Line Item Management screen appears:</p> <ul style="list-style-type: none">➤ Review the rest of the line items➤ Click the <i>Summary</i> menu option

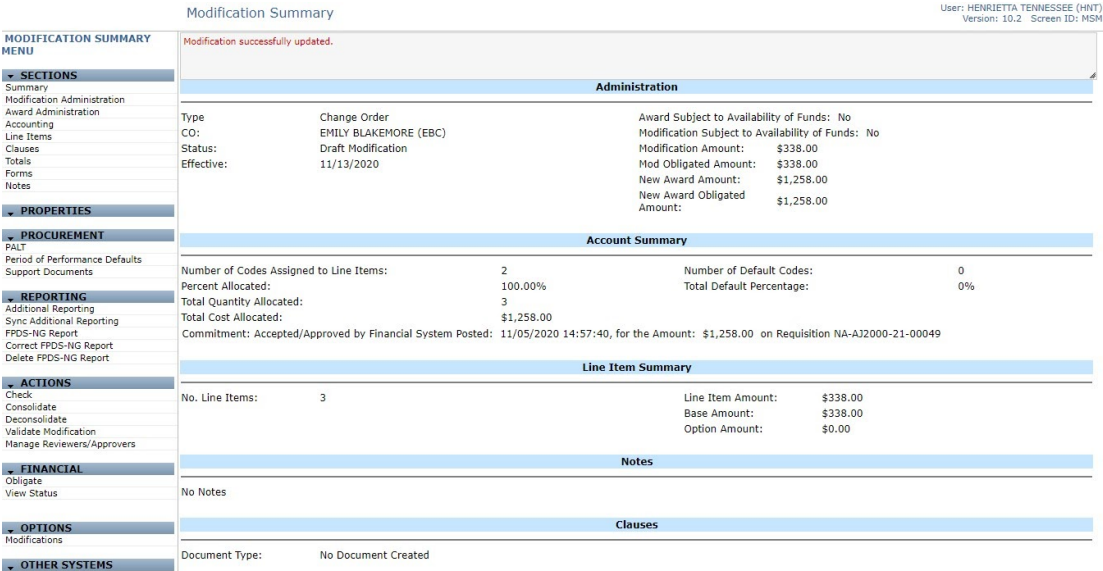
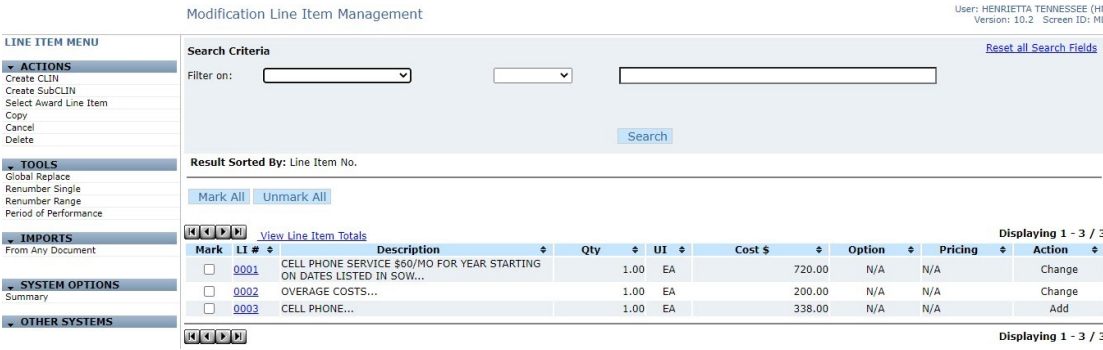
Step	Action
<p>9</p>	<p>The Purchase Request Summary screen appears:</p>  <p>➤ Take note of the PR #</p> <p>➤ Click Home</p>
<p>10</p>	<p>From the Home screen open the award using one of the following view tabs:</p> <ul style="list-style-type: none"> ➤ Hotlist ➤ Recently Accessed ➤ Worksheet
<p>11</p>	<p>From the Award Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Modifications</i> menu option

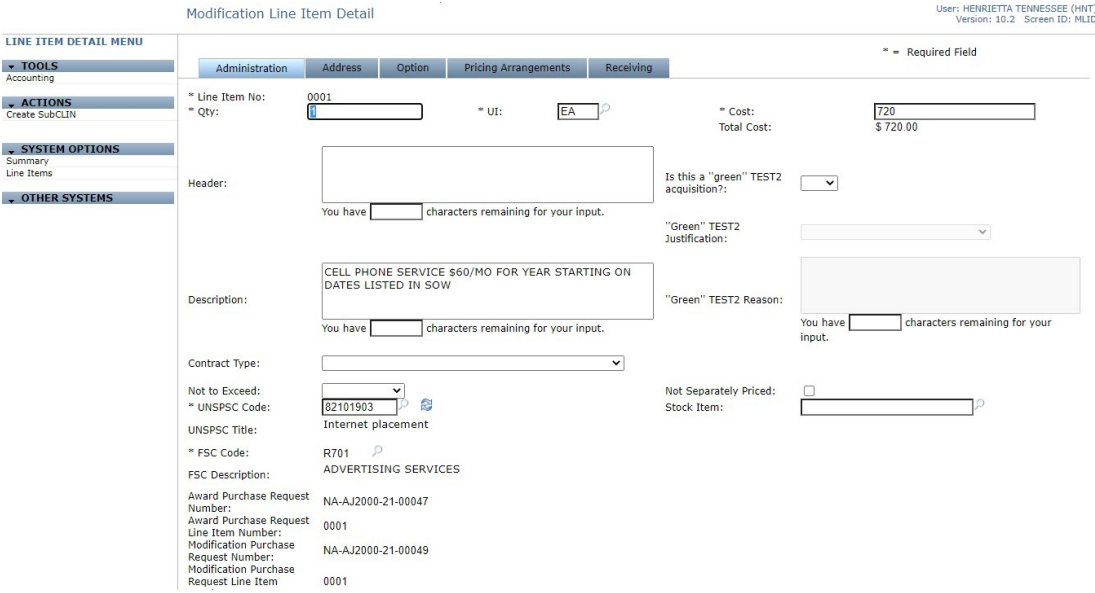
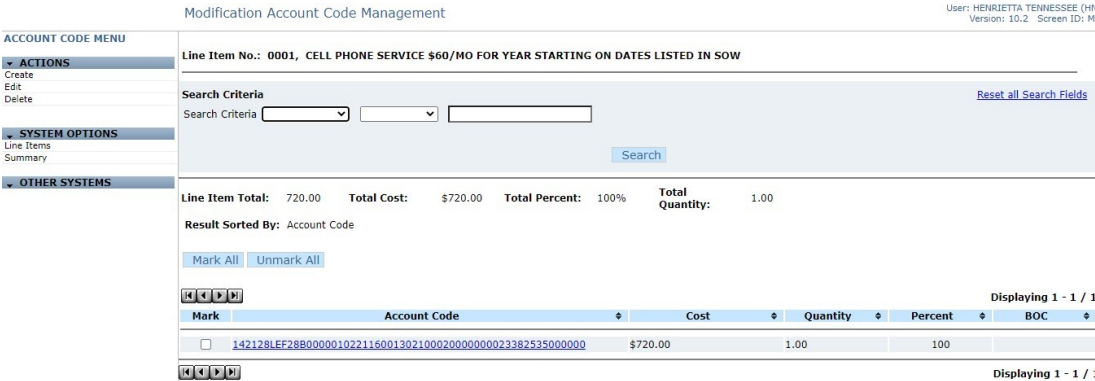
Step	Action
<p>12</p>	<p>The Modification Management screen appears:</p>  <p>➤ Click the <i>Create</i> menu option</p>
<p>13</p>	<p>The Modification PIIN and Name screen appears:</p>  <p>➤ Using the drop-down listing choose the incoming PR #</p> <p>➤ Click <i>Save</i></p>

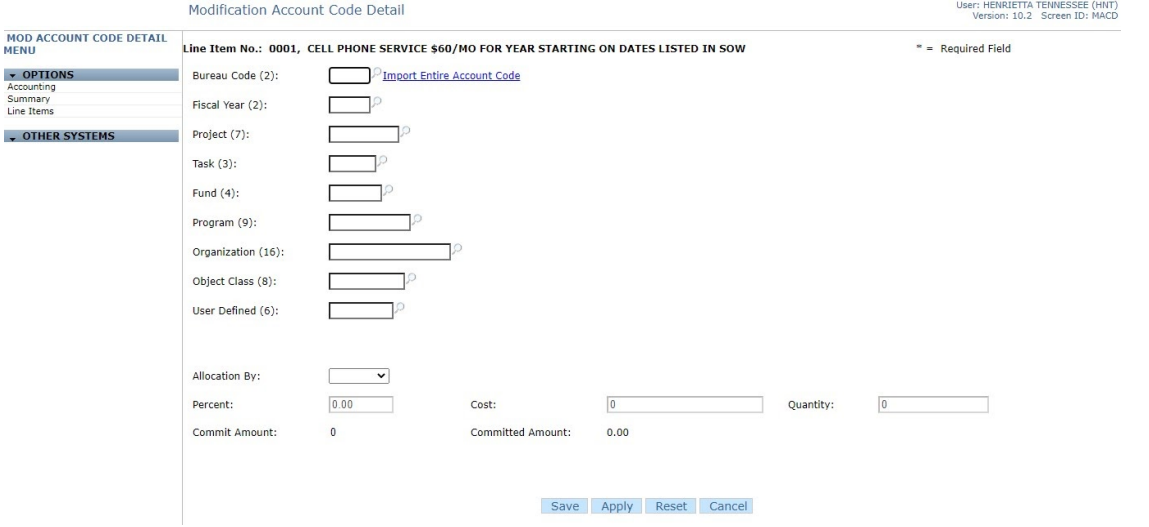
Step	Action
14	<p>The Modification Administration screen <i>Administration</i> view tab appears:</p>  <p>The screenshot shows the 'Modification Administration' screen with the 'Administration' tab selected. The 'Procurement Information' section includes fields for Purchase Request Number (NA-AJ2000-21-0049), Award PIIN (GS35F0115X/1305M221FNCNJ0006), Award Name (20201110 EX 9-1 AWD HNT), and Award Issued Date (11/10/2020). The 'Modification Information' section includes fields for Modification Number (P20001), Modification Effective Date (11/13/2020), Modification Name (P20001), and Type of Modification (Change Order). The 'Signatures' section includes fields for Contracting Officer (EBC), Date Signed, Contractor (00000932), and Number of Copies (1). There are also checkboxes for 'Contractor is required to sign and return the modification' and 'Novation'.</p> <ul style="list-style-type: none"> ➤ Enter the Date Signed (i.e. current date) ➤ Check the box Contractor is required to sign and return the modification ➤ Enter the Nbr of Copies (i.e. 1) ➤ Click the <i>Address</i> tab

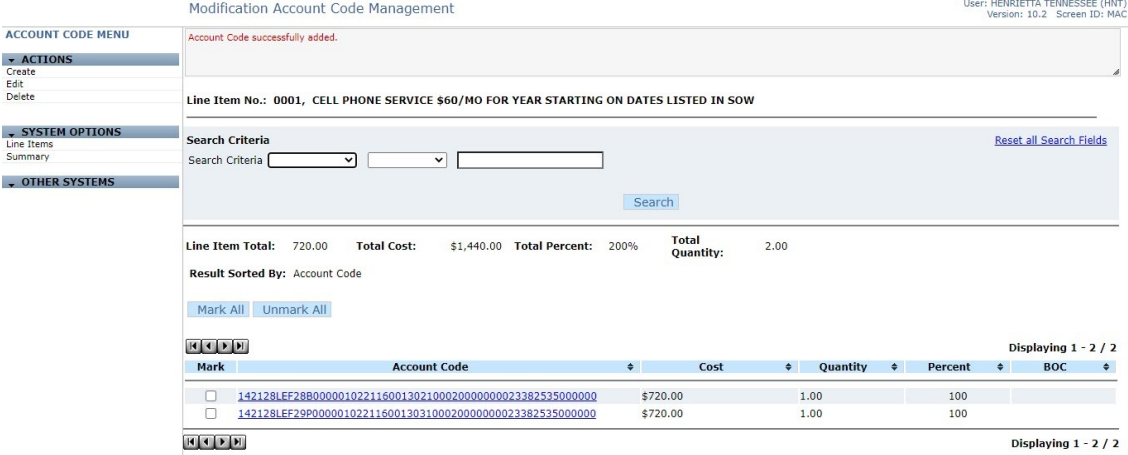
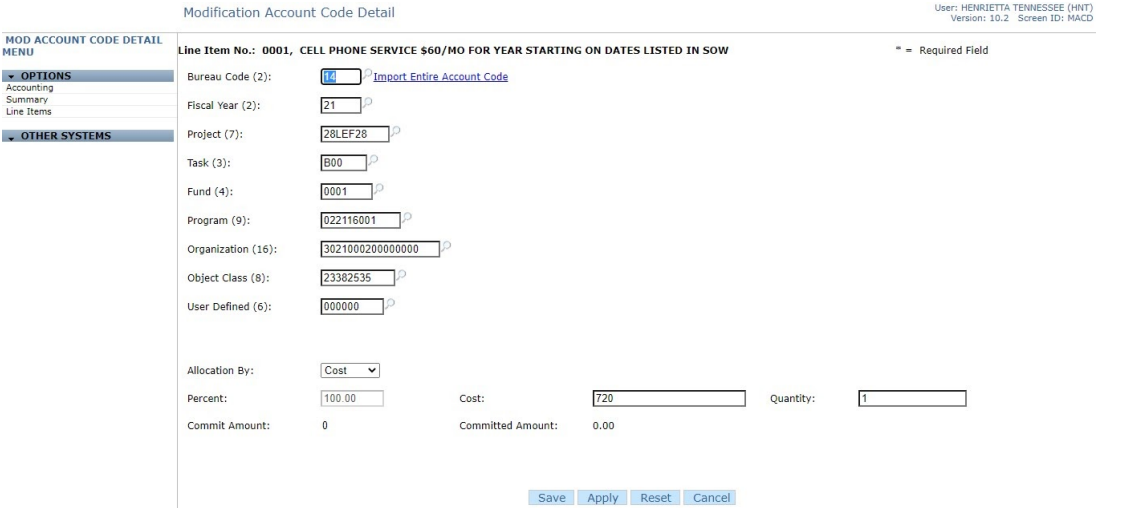
Step	Action
<p>15</p>	<p>The <i>Address</i> tab appears:</p> <p>The screenshot shows the 'Modification Administration' page with the 'Addresses' tab selected. The 'Administration' tab is also visible. The 'Government POC' field is empty. The 'Issuing Office' and 'Administering Office' fields are populated with 'AJ930073' and 'NOAA/EASTERN REGIONAL ACQUISITION DIV' respectively. The 'Addresses' section shows the address: 'NOAA/EASTERN REGIONAL ACQUISITION DIV, 200 GRANBY STREET, NORFOLK VA 23510'. The 'Government POC' field is empty. The 'Save', 'Apply', 'Reset', and 'Cancel' buttons are visible at the bottom.</p> <ul style="list-style-type: none"> ➤ Review addresses change if necessary ➤ Enter the Government POC (i.e. training ID) ➤ Click the <i>refresh</i> icon ➤ Click the <i>Description</i> tab

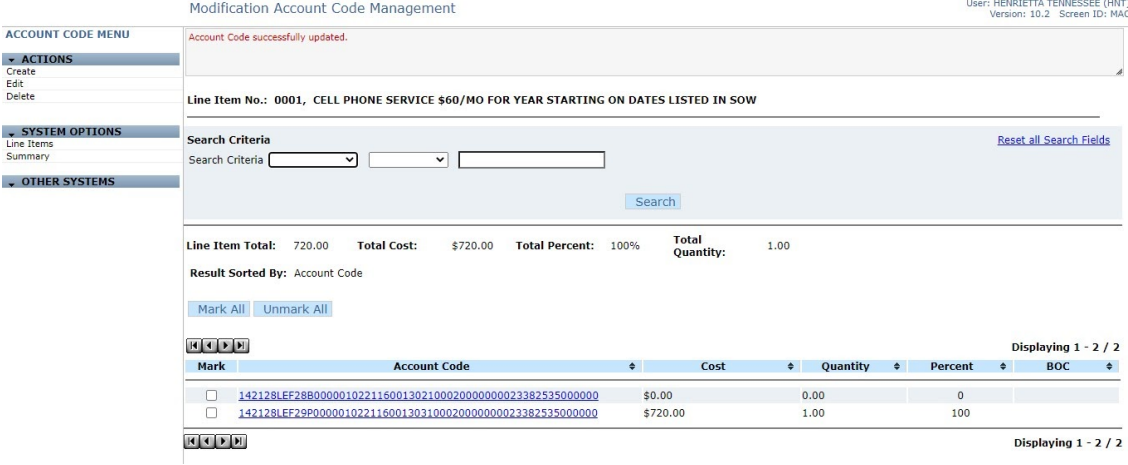
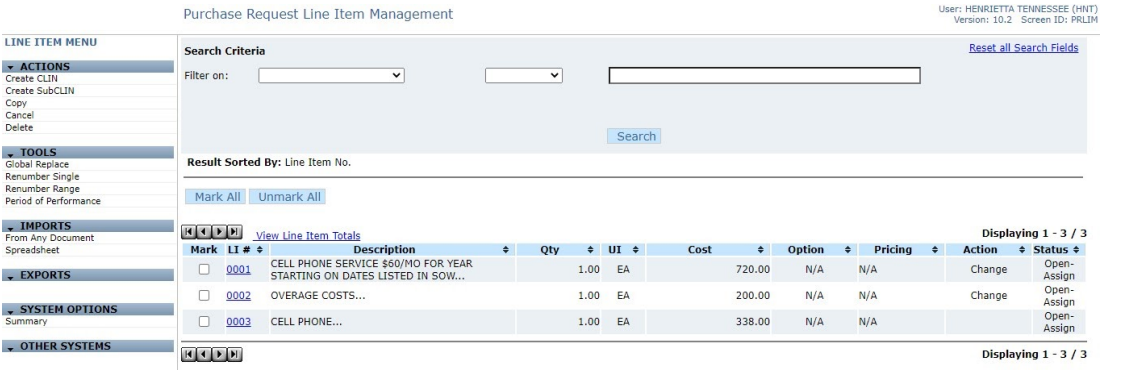
Step	Action
<p>16</p>	<p>The <i>Description</i> view tab appears:</p>  <p>➤ Enter a description (i.e. THIS MODIFICATION IS TO CHANGE ACCOUNTING ON LINES 1 & 2 AND THEN ADD A NEW THIRD LINE)</p> <p>➤ Click <i>Save</i></p>

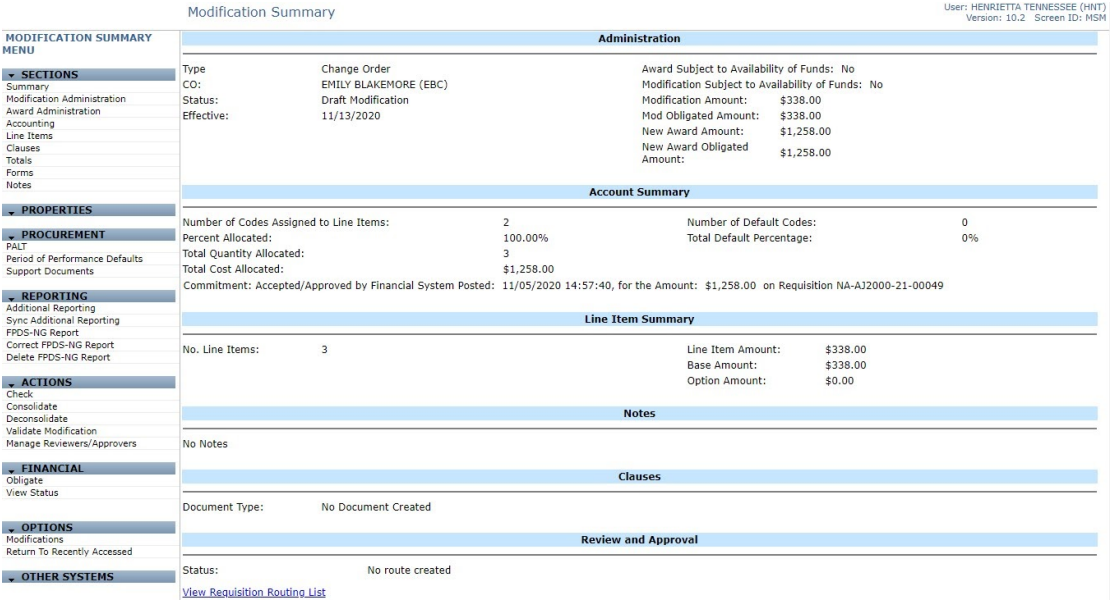
Step	Action
<p>17</p>	<p>The Modification Summary screen appears:</p>  <p>➤ Click the <i>Line Items</i> menu option</p>
<p>18</p>	<p>The Modification Line Item Management screen appears:</p>  <p>➤ Click the <i>Line Item Number</i> (i.e. 0001)</p>

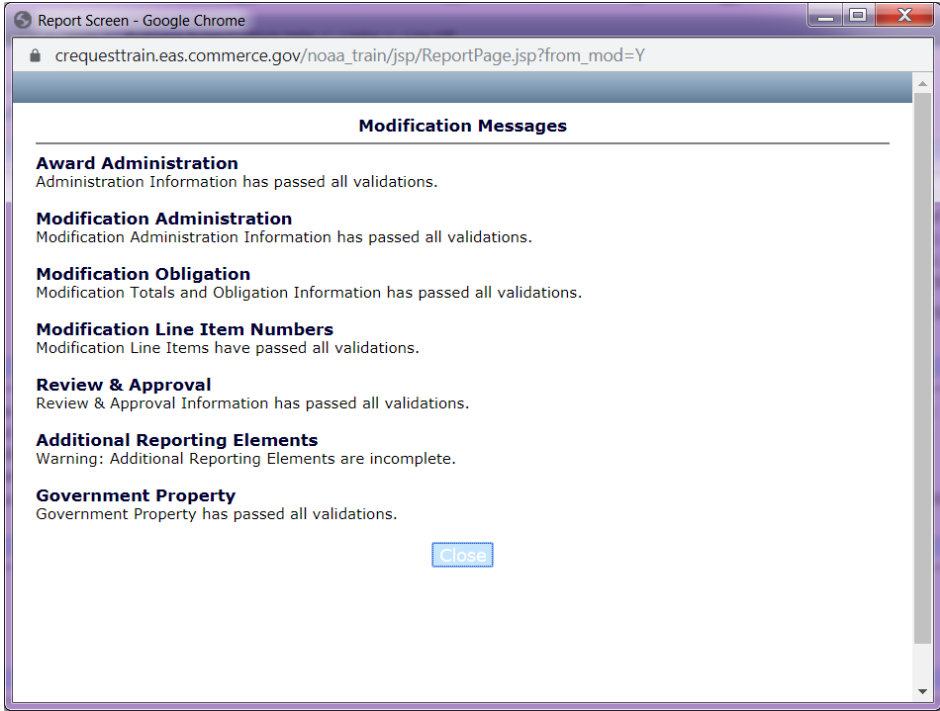
Step	Action
<p>19</p>	<p>The Modification Line Item Number screen appears:</p>  <p>➤ Click the <i>Accounting</i> menu option</p>
<p>20</p>	<p>The Modification Account Code Management screen appears:</p>  <p>➤ Click the <i>Create</i> menu option</p>
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ Accounting on the line(s) on a modification will be what was on the original award ✓ Add the new accounting that was on the change PR prior to doing anything to the old one if it was meant to replace it

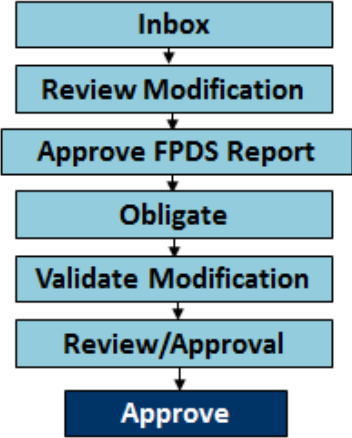
Step	Action
<p>21</p>	<p>The Modification Account Code Detail screen appears:</p>  <p>➤ Add the new accounting code (i.e. 14.21.28LEF29.P00.0001.022116001.3031000200000000.23382535.000000)</p> <p>➤ Change the Allocation By field to value on the PR (i.e. cost)</p> <p>➤ Enter the values based on the allocation from the PR (i.e. 720 cost /1 quantity)</p> <p>➤ Click <i>Save</i></p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ You should always add the new accounting the way it was presented on the modification PR

Step	Action
<p>22</p>	<p>The Modification Account Code Management screen appears with two accounting strings now showing:</p>  <p>➤ Check the box of the original accounting string</p> <p>➤ Click the <i>Edit</i> menu option</p>
<p>23</p>	<p>The Modification Account Code Detail screen appears:</p>  <p>➤ Change the values to 0</p> <p>➤ Click <i>Save</i></p>

Step	Action
<p>24</p>	<p>The Modification Account Code Management screen appears with two accounting strings now showing one being at zero:</p>  <p>➤ Click the <i>Line Items</i> menu option</p>
<p>25</p>	<p>The Modification Line Item Management screen appears:</p>  <p>➤ Repeat the accounting code change process for line 2</p> <p>➤ Verify Line 3 accounting</p> <p>➤ Click the <i>Summary</i> menu option</p>

Step	Action
26	<p>The Modification Summary screen appears:</p>  <p>The screenshot shows the 'Modification Summary' screen with a left-hand menu and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, REPORTING, ACTIONS, FINANCIAL, and OPTIONS. The main content area displays details for a 'Change Order' by 'EMILY BLAKEMORE (EBC)', including amounts and dates. Summary sections like 'Administration', 'Account Summary', 'Line Item Summary', and 'Review and Approval' are visible.</p> <ul style="list-style-type: none"> ➤ See at the top of the Summary screen the new updated amounts ➤ Click the <i>Check</i> menu option

Step	Action
27	<p data-bbox="298 302 631 338">A pop-up screen appears:</p> <div data-bbox="298 367 1232 1073"><p data-bbox="298 367 1232 1073">The screenshot shows a browser window with the URL <code>crequestrain.eas.commerce.gov/noaa_train/jsp/ReportPage.jsp?from_mod=Y</code>. The page content is titled "Modification Messages" and lists the following items:</p><ul style="list-style-type: none">Award Administration: Administration Information has passed all validations.Modification Administration: Modification Administration Information has passed all validations.Modification Obligation: Modification Totals and Obligation Information has passed all validations.Modification Line Item Numbers: Modification Line Items have passed all validations.Review & Approval: Review & Approval Information has passed all validations.Additional Reporting Elements: Warning: Additional Reporting Elements are incomplete.Government Property: Government Property has passed all validations.<p data-bbox="298 367 1232 1073">A "Close" button is located at the bottom center of the message box.</p></div> <p data-bbox="298 1108 971 1144">If everything passes all validation finish the process:</p> <ul data-bbox="298 1163 1032 1308" style="list-style-type: none">➤ FPDS Reporting (not necessary for training purposes)➤ Manage Reviewers/Approvers➤ Release to Approver

Step	Action
28	<p>The Approver follows the following steps for the modification:</p>  <pre>graph TD; A[Inbox] --> B[Review Modification]; B --> C[Approve FPDS Report]; C --> D[Obligate]; D --> E[Validate Modification]; E --> F[Review/Approval]; F --> G[Approve];</pre> <p>The flowchart illustrates a seven-step process for modification. It begins with 'Inbox', followed by 'Review Modification', 'Approve FPDS Report', 'Obligate', 'Validate Modification', 'Review/Approval', and finally 'Approve'. Each step is contained within a rectangular box, and the boxes are connected by downward-pointing arrows. The 'Approve' box at the bottom is a darker shade of blue compared to the others.</p>

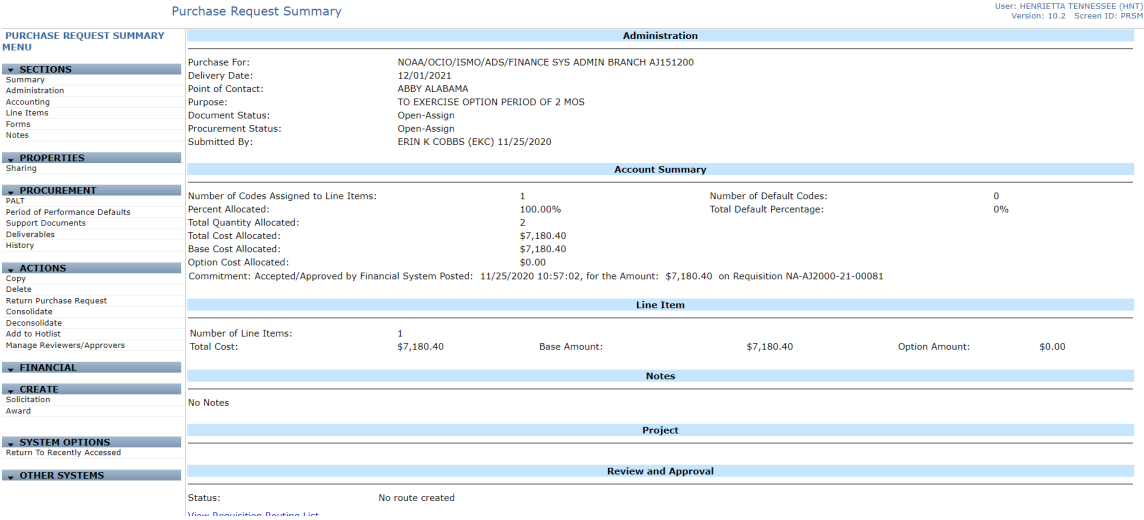
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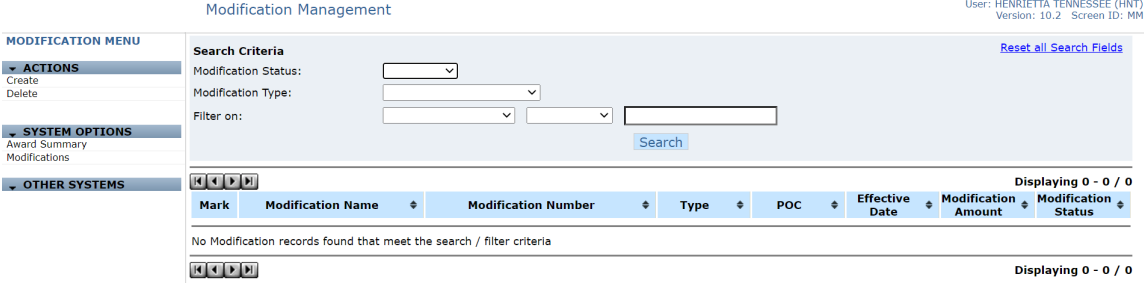
Exercise #10: Create Award Modification – Option Periods


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

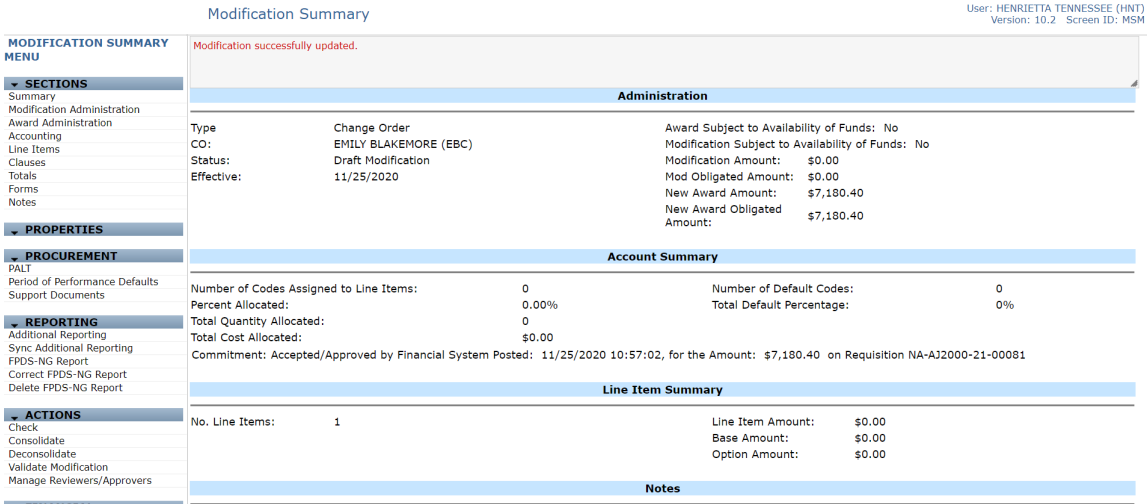
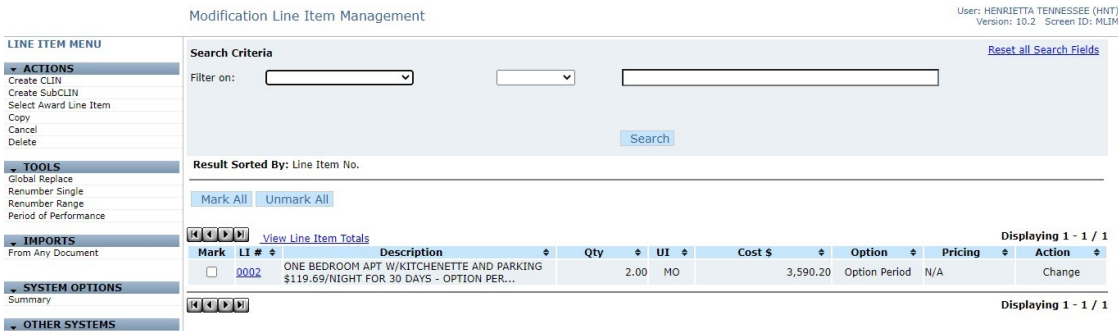
Instructions: Execute the following steps:

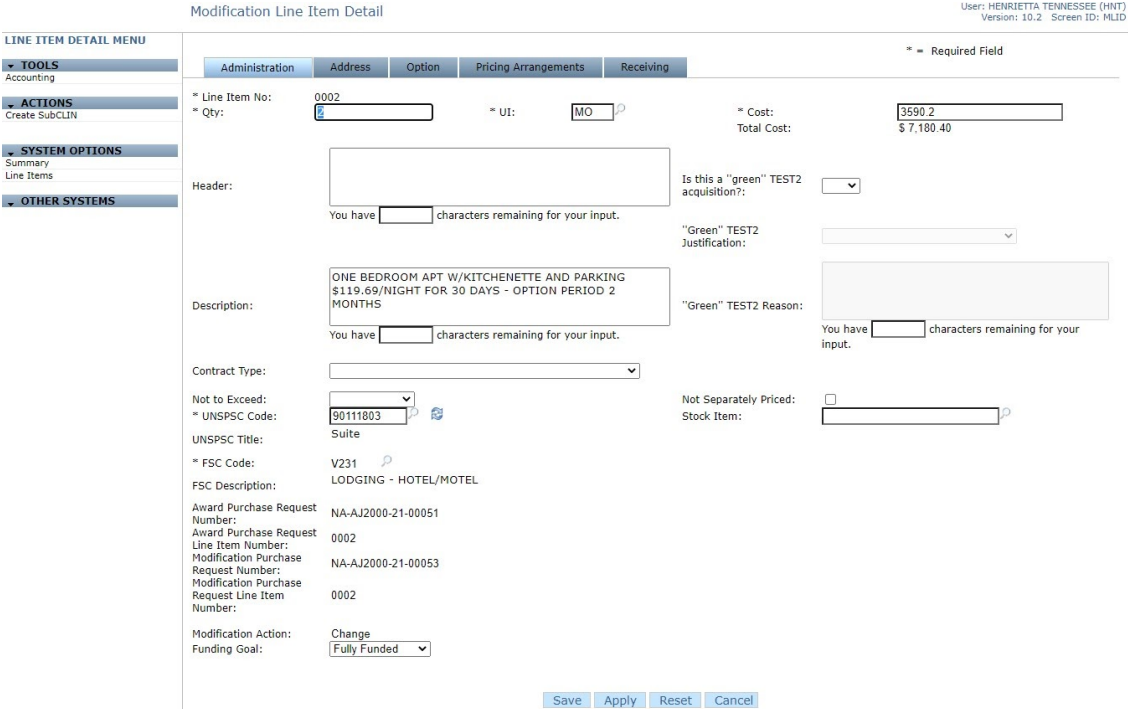
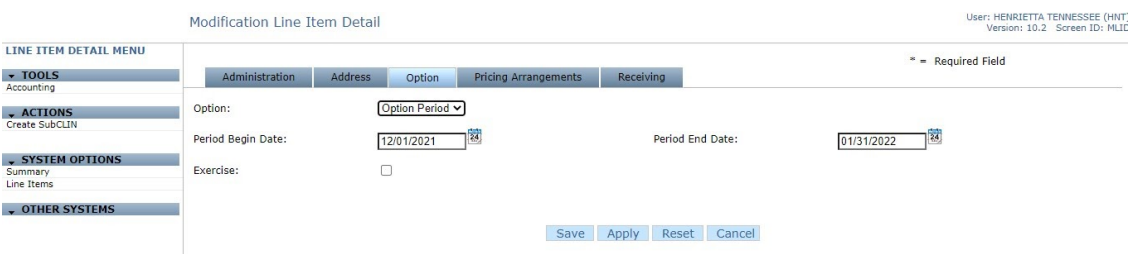
You’ve received a PR to modify an award that is to exercise an option period.

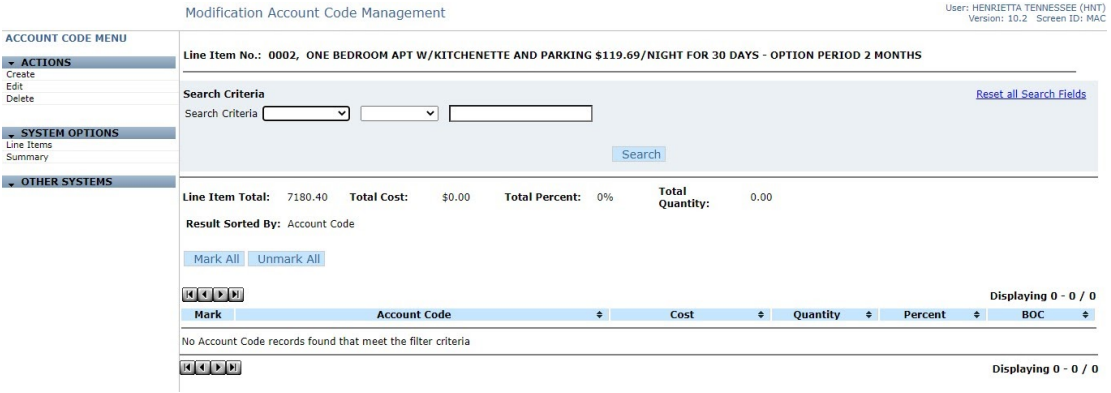
Step	Action																																														
1	<p>From the <i>Just In</i> tab.</p> <p>➤ Click the <i>PR#</i></p>																																														
2	<p>The Purchase Request Summary screen appears:</p>  <p>The screenshot shows the 'Purchase Request Summary' screen with a navigation menu on the left and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, ACTIONS, FINANCIAL, CREATE, SYSTEM OPTIONS, and OTHER SYSTEMS. The main content area displays details for a purchase request, including delivery date, point of contact, purpose, document status, and procurement status. It also shows account summary statistics and a line item table.</p> <table border="1" data-bbox="479 1218 1429 1323"> <caption>Account Summary</caption> <thead> <tr> <th>Field</th> <th>Value</th> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Number of Codes Assigned to Line Items:</td> <td>1</td> <td>Number of Default Codes:</td> <td>0</td> </tr> <tr> <td>Percent Allocated:</td> <td>100.00%</td> <td>Total Default Percentage:</td> <td>0%</td> </tr> <tr> <td>Total Quantity Allocated:</td> <td>2</td> <td></td> <td></td> </tr> <tr> <td>Total Cost Allocated:</td> <td>\$7,180.40</td> <td></td> <td></td> </tr> <tr> <td>Base Cost Allocated:</td> <td>\$7,180.40</td> <td></td> <td></td> </tr> <tr> <td>Option Cost Allocated:</td> <td>\$0.00</td> <td></td> <td></td> </tr> </tbody> </table> <table border="1" data-bbox="479 1354 1429 1396"> <caption>Line Item</caption> <thead> <tr> <th>Field</th> <th>Value</th> <th>Field</th> <th>Value</th> <th>Field</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>Number of Line Items:</td> <td>1</td> <td>Base Amount:</td> <td>\$7,180.40</td> <td>Option Amount:</td> <td>\$0.00</td> </tr> <tr> <td>Total Cost:</td> <td>\$7,180.40</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>➤ Review the entire change PR</p> <p>➤ Write down the change PR number</p> <p>➤ Once finished, close the PR</p>	Field	Value	Field	Value	Number of Codes Assigned to Line Items:	1	Number of Default Codes:	0	Percent Allocated:	100.00%	Total Default Percentage:	0%	Total Quantity Allocated:	2			Total Cost Allocated:	\$7,180.40			Base Cost Allocated:	\$7,180.40			Option Cost Allocated:	\$0.00			Field	Value	Field	Value	Field	Value	Number of Line Items:	1	Base Amount:	\$7,180.40	Option Amount:	\$0.00	Total Cost:	\$7,180.40				
Field	Value	Field	Value																																												
Number of Codes Assigned to Line Items:	1	Number of Default Codes:	0																																												
Percent Allocated:	100.00%	Total Default Percentage:	0%																																												
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Number of Line Items:	1	Base Amount:	\$7,180.40	Option Amount:	\$0.00																																										
Total Cost:	\$7,180.40																																														

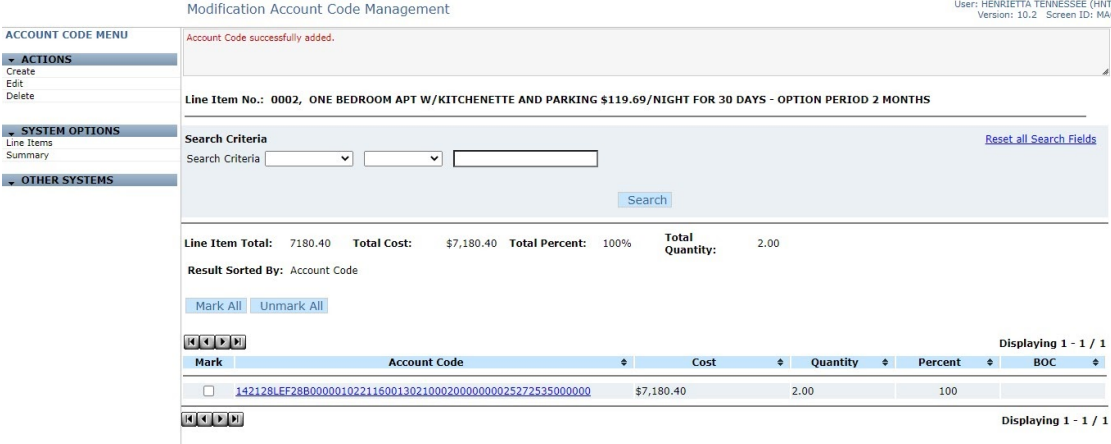
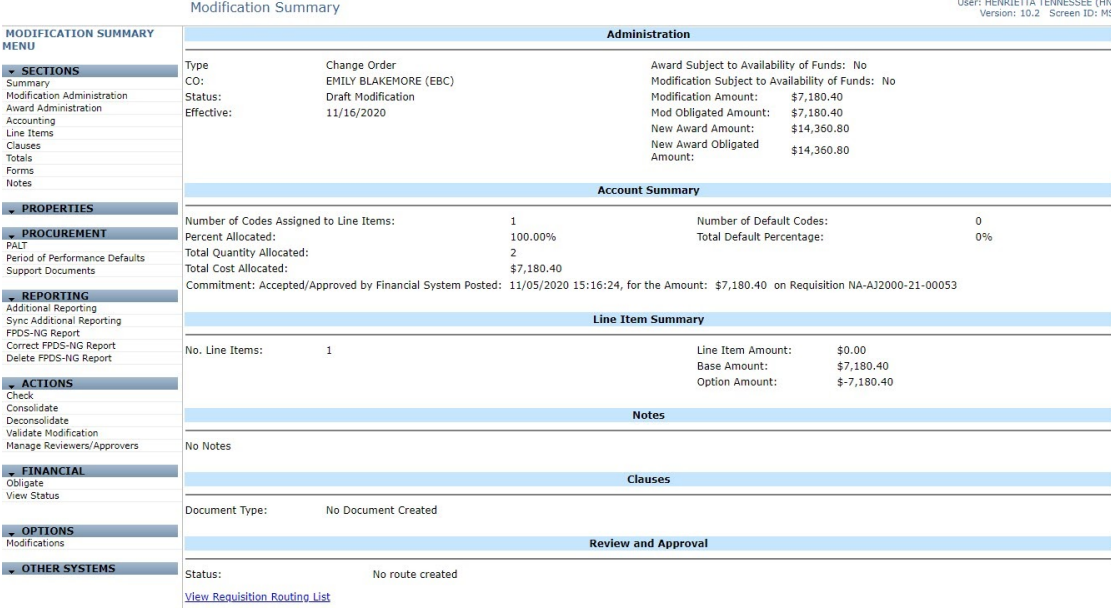
Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ When a change PR comes in to exercise an option period, verify on the original award that no accounting was associated when it was originally awarded ✓ Option periods must have accounting with the current fiscal year accounting ✓ For options periods, be sure on the original award that there is no accounting associated. When exercising an option period, you will need to use current Fiscal Year Accounting.
<p>3</p>	<p>From the Home screen open up the award using one of the following view tabs:</p> <ul style="list-style-type: none"> ➤ Hotlist ➤ Recently Accessed ➤ Worksheet
<p>4</p>	<p>From the Award Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Modifications</i> menu option
<p>5</p>	<p>The Modification Management screen appears:</p>  <ul style="list-style-type: none"> ➤ Click the <i>Create</i> menu option

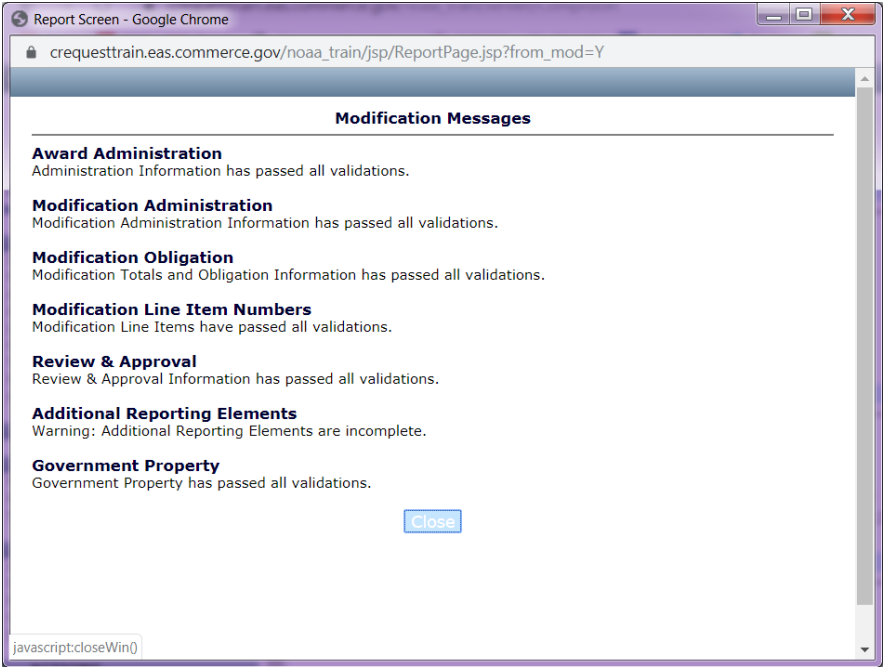
Step	Action
<p>6</p>	<p>The Modification PIIN and Name screen appears:</p>  <p>➤ Use the drop-down list to select the change PR #.</p> <p>➤ Click <i>Save</i></p>
<p>7</p>	<p>The Modification Administration screen <i>Administration</i> view tab appears:</p> <p>➤ Enter the Date Signed (i.e. current date)</p> <p>➤ Check the box Contractor is required to sign and return the modification</p> <p>➤ Enter the Number of Copies (i.e. 1)</p> <p>➤ Click the <i>Address</i> tab</p>
<p>8</p>	<p>The <i>Address</i> tab opens:</p> <p>➤ Enter the Government POC (i.e. training ID)</p> <p>➤ Click the <i>refresh</i> icon</p> <p>➤ Click the <i>Description</i> tab</p>
<p>9</p>	<p>The <i>Description</i> tab opens:</p> <p>➤ Enter a description (i.e. MODIFICATION IS FOR EXERCISING OPTION PERIOD LINE 2)</p> <p>➤ Click <i>Save</i></p>

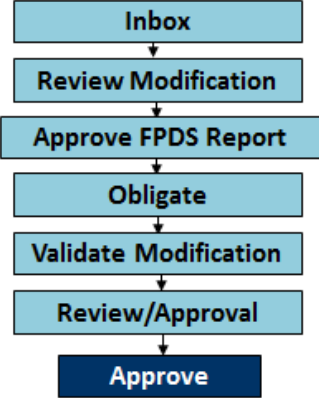
Step	Action
<p>10</p>	<p>The Modification Summary screen appears:</p>  <p>➤ Click the <i>Line Items</i> menu option</p>
<p>11</p>	<p>The Modification Line Item Management screen appears:</p>  <p>➤ Click the <i>Line Item Number</i> (i.e. 0002)</p>

Step	Action
<p>12</p>	<p>The Modification Line Item Number screen appears:</p>  <p>➤ Click the <i>Option</i> tab</p>
<p>13</p>	<p>The Modification Line Item Detail screen <i>Option</i> view tab opens:</p>  <p>➤ Check the Exercise checkbox</p> <p>➤ Click <i>Apply</i></p> <p>➤ Click the <i>Accounting</i> menu option</p>

Step	Action
<p>14</p>	<p>The Modification Account Code Management screen appears:</p>  <p>➤ Click the <i>Create</i> menu option</p> <p>Notes:</p> <ul style="list-style-type: none"> ✓ Remember the line information on modifications come from the original award ✓ Option periods on original awards should not have any accounting associated to it ✓ Copying the accounting from the change PR is needed in order to create the accounting to the exercises option period
<p>15</p>	<p>The Modification Account Code Detail screen appears:</p> <ul style="list-style-type: none"> ➤ Add the new accounting code (i.e. 14.21.28LEF28.B00.0001.022116001.3021000200000000.25272535.000000) ➤ Change the Allocation By field to Cost ➤ Enter the Cost (i.e. 7180.40) ➤ Enter the Quantity (i.e. 2) ➤ Click <i>Save</i> <p>Note: You should always add the new accounting the way it was presented on the modification PR.</p>

Step	Action
<p>16</p>	<p>The Modification Account Code Management screen appears with the accounting strings now showing:</p>  <p>➤ Click the <i>Summary</i> menu option</p>
<p>17</p>	<p>The Modification Summary screen appears:</p>  <p>➤ Click the <i>Check</i> menu option</p>

Step	Action
18	<p>A pop-up screen appears:</p>  <p>If everything passes all validation finish the process:</p> <ul style="list-style-type: none"> ➤ FPDS Reporting (not necessary for training purposes) ➤ Manage Reviewers/Approvers ➤ Release to Approver

Step	Action
19	<p>The Approver would follow the following steps for the modification:</p>  <pre>graph TD; A[Inbox] --> B[Review Modification]; B --> C[Approve FPDS Report]; C --> D[Obligate]; D --> E[Validate Modification]; E --> F[Review/Approval]; F --> G[Approve];</pre>

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

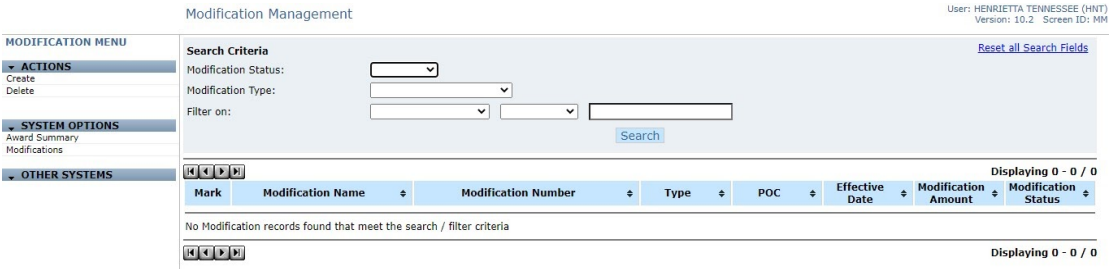
Objectives:

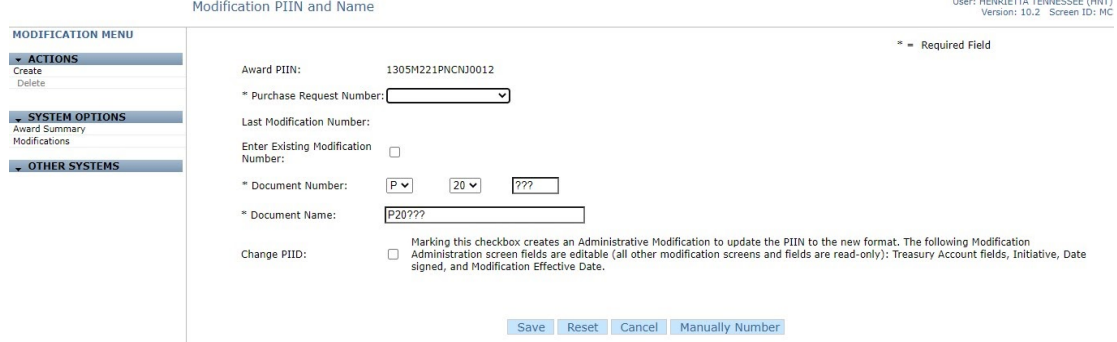
- Navigate through C.Award
- Create an Award Modification
- How to modify an award to cancel a line item (cancel/cancel)
- How to modify an award to cancel a line item to reuse (cancel/open)
- Follow flow chart

Instructions: Execute the following steps:

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

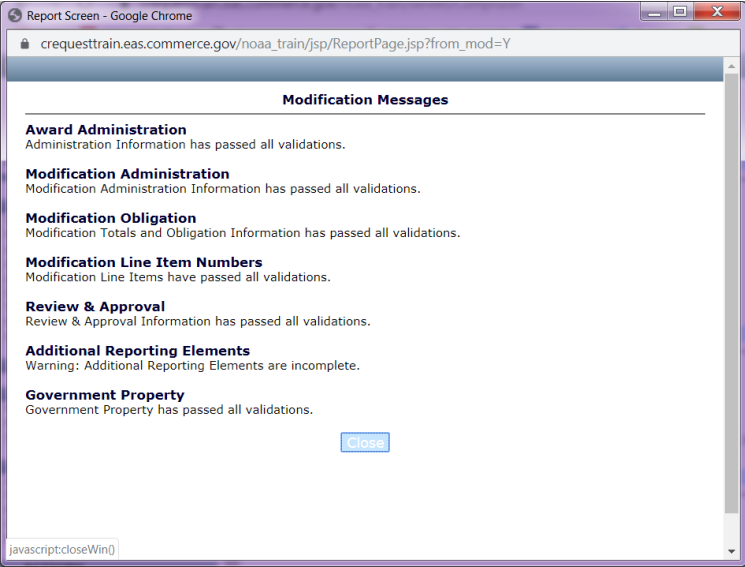
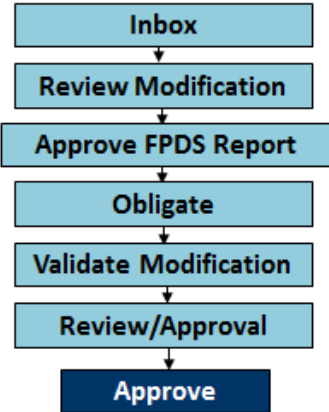
Step	Action
1	From the <i>Just In</i> tab. ➤ Click the <i>PR#</i>
2	The Purchase Request Summary screen opens:  <p>The screenshot shows the 'Purchase Request Summary' screen with a navigation menu on the left and a main content area. The main content area includes sections for Administration, Account Summary, Line Item, Notes, Project, and Review and Approval. The Line Item section shows 2 items with a total cost of \$6,278.00.</p>
	➤ Review the entire change PR ➤ Write down the change PR number ➤ Once finished, close the PR

Step	Action
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ For training purposes verify that CLIN 0005 Modification LI Action is Cancel/Open ✓ For training purposes verify the CLIN 0006 Modification LI Action is Cancel/Cancel
3	<p>From the Home screen open up the award using one of the following view tabs:</p> <ul style="list-style-type: none"> ➤ Hotlist ➤ Recently Accessed ➤ Worksheet
4	<p>From the Award Summary screen:</p> <ul style="list-style-type: none"> ➤ Click the <i>Modifications</i> menu option
5	<p>The Modification Management screen appears:</p>  <p>➤ Click the <i>Create</i> menu option</p>

Step	Action
6	<p>The Modification PIIN and Name screen appears:</p>  <ul style="list-style-type: none"> ➤ Use the drop-down list to select the change PR # ➤ Click <i>Save</i>
7	<p>The Modification Administration screen <i>Administration</i> view tab appears:</p> <ul style="list-style-type: none"> ➤ Enter the Date Signed (i.e. current date) ➤ Check the box Contractor is required to sign and return the modification ➤ Enter Nbr of Copies (i.e. 1) ➤ Click the <i>Address</i> tab
8	<p>The <i>Address</i> view tab appears:</p> <ul style="list-style-type: none"> ➤ Enter Government POC (i.e. training ID) ➤ Click the <i>refresh</i> icon ➤ Click the <i>Description</i> view tab
9	<p>The <i>Description</i> view tab appears:</p> <ul style="list-style-type: none"> ➤ Enter a description (i.e. MODIFICATION IS TO CANCEL/OPEN CLIN 000 5 AND CANCEL/CANCEL CLIN 0006) ➤ Click <i>Save</i>

Step	Action
<p>10</p>	<p>The Modification Summary screen appears:</p> <p>➤ Click the <i>Line Items</i> menu option</p>
<p>11</p>	<p>The Modification Line Item Management screen appears:</p> <p>➤ Be sure the Action shows Cancel/Open and Cancel/Cancel and that the costs are correct</p> <p>➤ Click the <i>Summary</i> menu option</p>

Step	Action																																																																																		
	<p>Notes:</p> <ul style="list-style-type: none"> ✓ <i>Cancelled lines are view only</i> ✓ <i>Cancel status can only be used on lines where no invoices have been paid</i> ✓ <i>Lines that have a paid amount on them must be de-obligated</i> 																																																																																		
<p>12</p>	<p>The Modification Summary screen appears:</p> <div style="border: 1px solid black; padding: 5px;"> <div style="text-align: right; font-size: small;">User: HENRIETTA TENNESSEE (HNT) Version: 10.2 Screen ID: MSM</div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="background-color: #e6f2ff;">Modification Summary</th> </tr> </thead> <tbody> <tr> <td style="width: 25%; background-color: #e6f2ff;">MODIFICATION SUMMARY MENU</td> <td style="background-color: #e6f2ff;">Administration</td> </tr> <tr> <td style="background-color: #e6f2ff;"> <ul style="list-style-type: none"> ▼ SECTIONS Summary Modification Administration Award Administration Accounting Line Items Clauses Totals Forms Notes </td> <td> <table border="0" style="width: 100%;"> <tr> <td>Type</td> <td>Change Order</td> <td>Award Subject to Availability of Funds:</td> <td>No</td> </tr> <tr> <td>CO:</td> <td>EMILY BLAKEMORE (EBC)</td> <td>Modification Subject to 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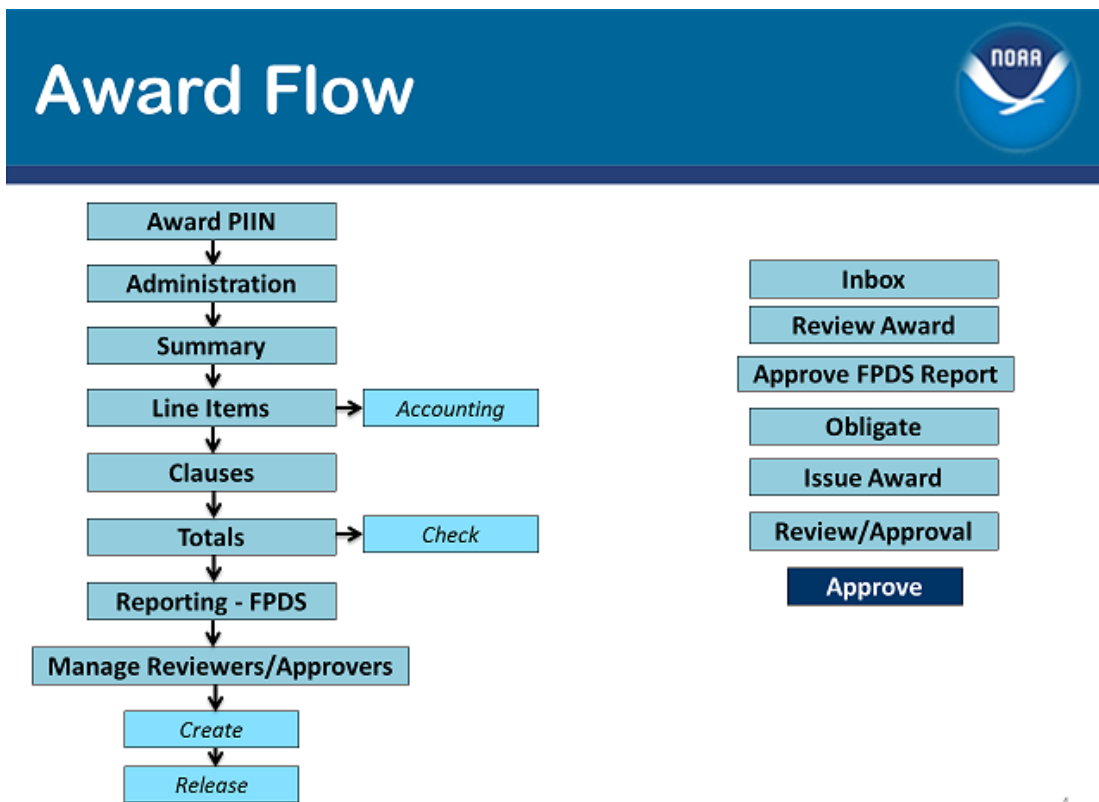
Step	Action
<p>13</p>	<p>A pop-up screen will appear:</p>  <p>If everything passes all validation finish the process:</p> <ul style="list-style-type: none"> ➤ FPDS Reporting (not necessary for training purposes) ➤ Manage Reviewers/Approvers ➤ Release to Approver
<p>14</p>	<p>The Approver would follow the following steps for the modification:</p>  <pre> graph TD A[Inbox] --> B[Review Modification] B --> C[Approve FPDS Report] C --> D[Obligate] D --> E[Validate Modification] E --> F[Review/Approval] F --> G[Approve] </pre>

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:

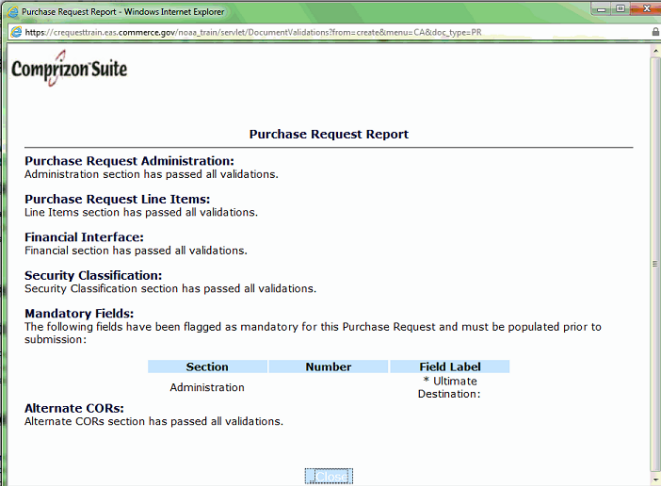
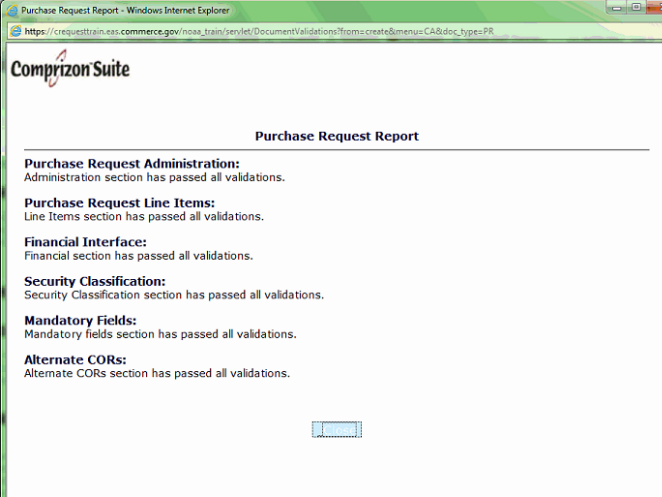
Notes: You need to set up a blanket award to establish a multi-year contract to provide shoreline mapping services. A blanket award should be for \$0. You will set it up with the minimum award total that task/delivery order along with the minimum and maximum quantity.

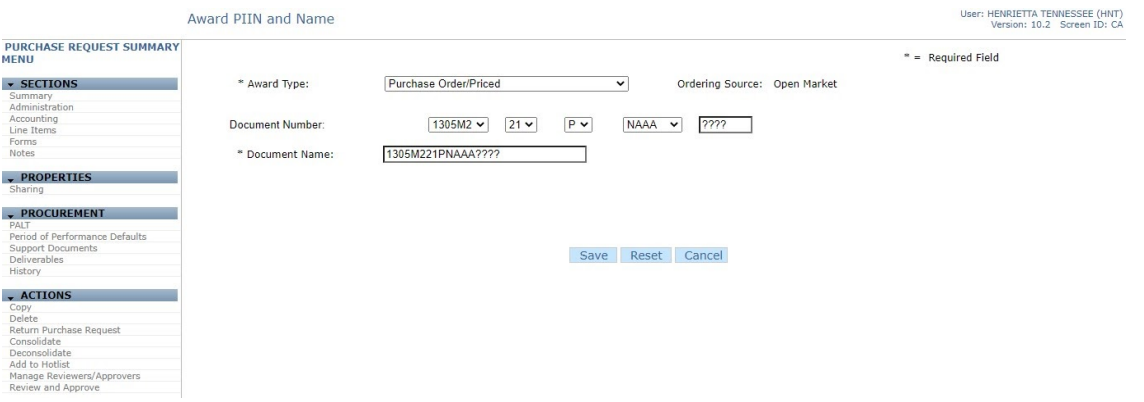


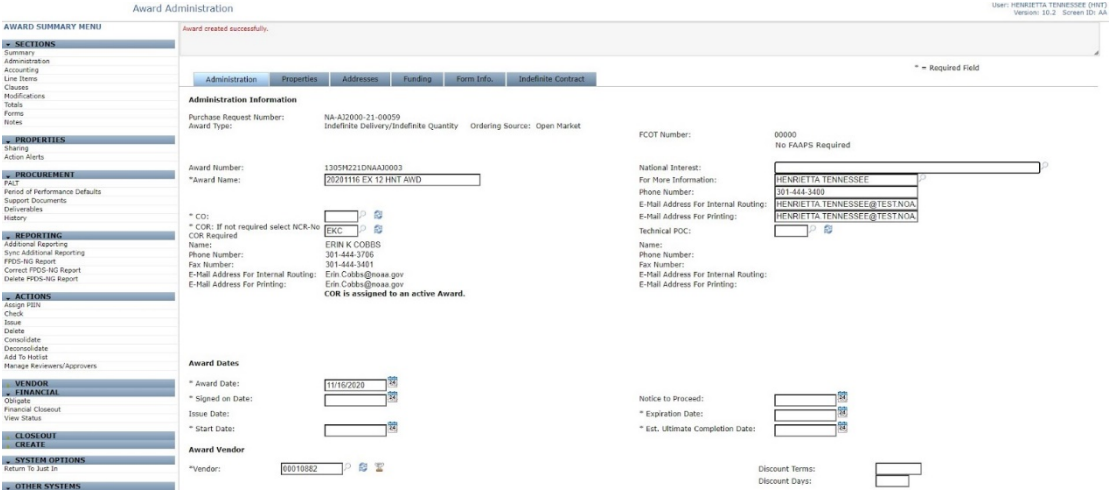
4

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

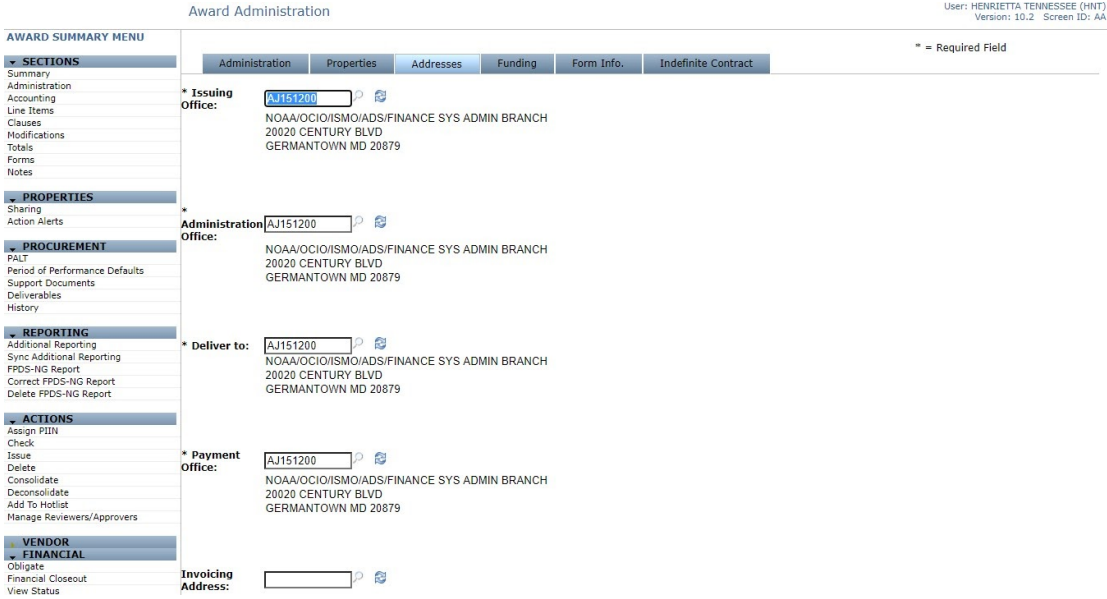
Step	Action
1	From the Home screen, open the <i>Just In</i> tab. <ul style="list-style-type: none">➤ Click the <i>PR#</i>➤ Review the PR in its entirety
1a	If the PR looks good, then you will need to: <ul style="list-style-type: none">➤ Click the <i>Create Award</i> menu option.

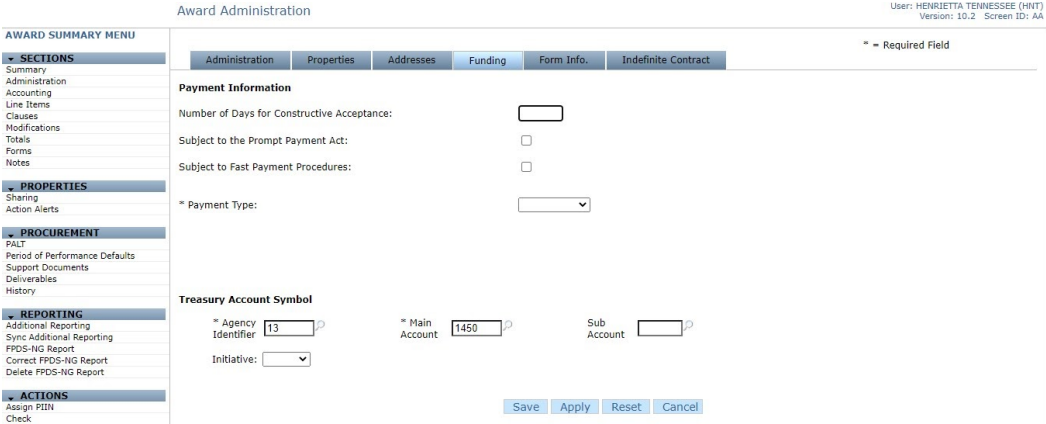
Step	Action
2	<p>The Purchase Request Report pop-up window opens. If anything doesn't pass validation, you will receive something like this:</p>  <p>If it passes, it might appear briefly looking like this:</p>  <p>You'll want to close it out to do so:</p> <ul style="list-style-type: none"> ➤ Maximize the minimized window ➤ Click <i>Close</i>

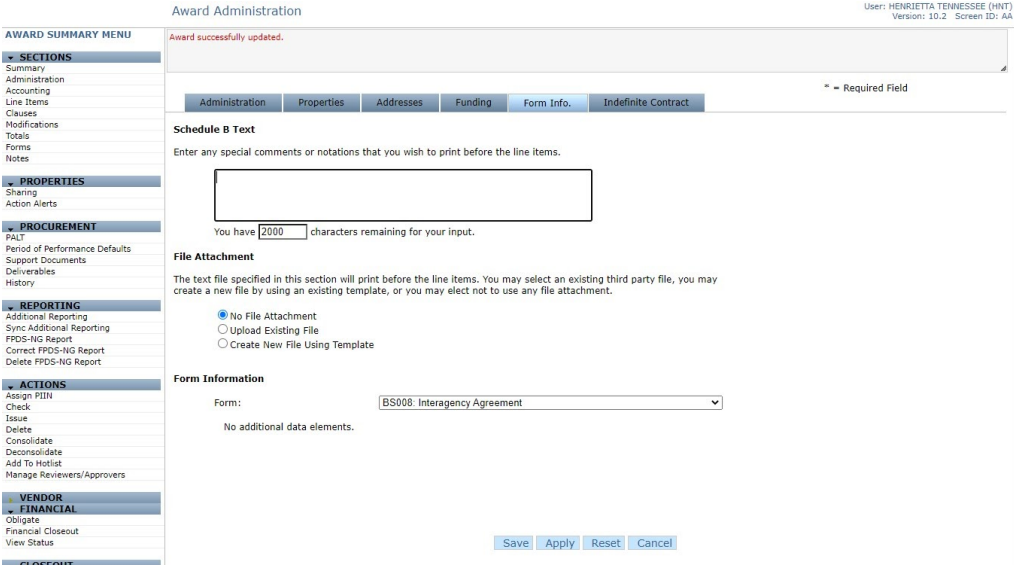
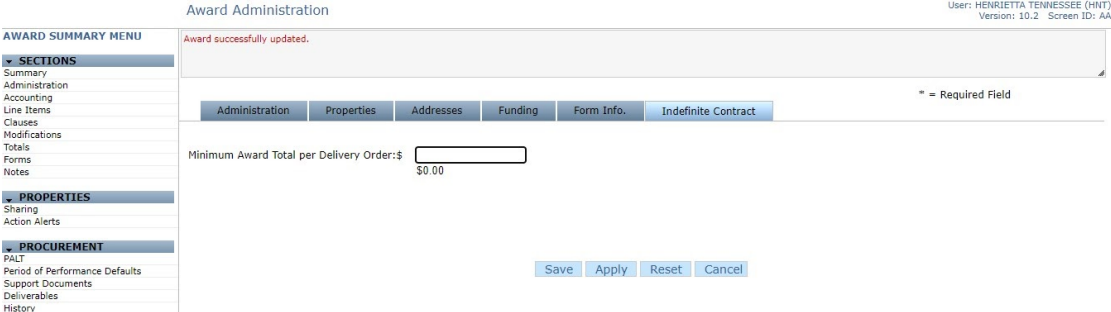
Step	Action
3	<p>The Award PIIN and Name screen appears:</p>  <p>➤ Select the Contract type (i.e. Indefinite Delivery/Indefinite Quantity)</p> <p>➤ Select the Award Number (i.e. 1305M2-FY-D-####-????)</p> <p>➤ Type in the Award Name (i.e. {date} EX 12 {TRAINING INITIALS} AWD)</p> <p>➤ Click <i>Save</i></p>

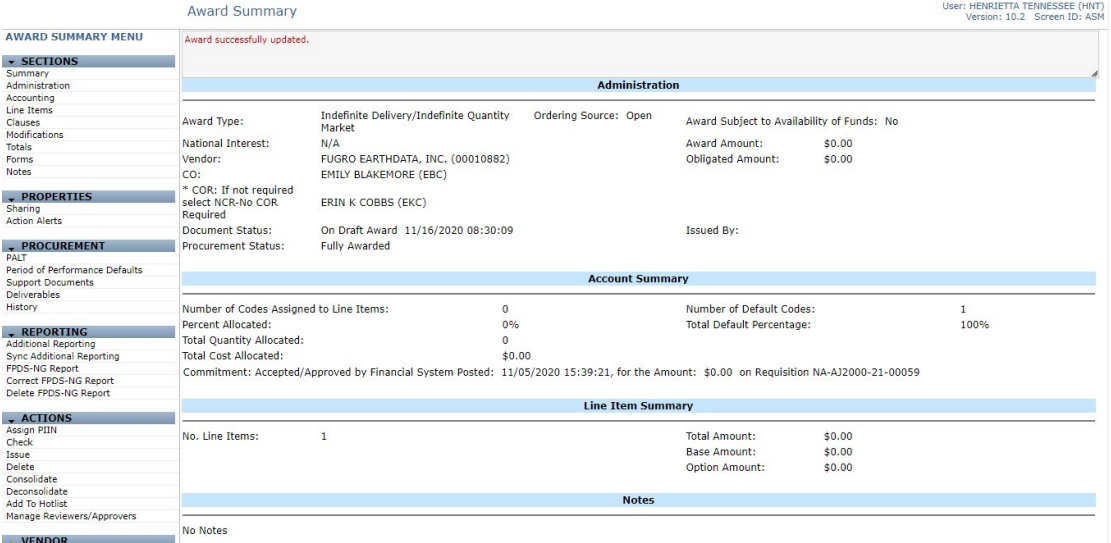
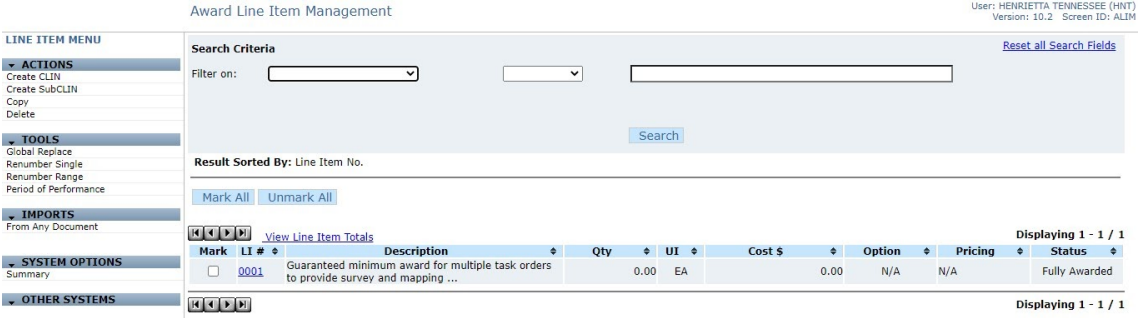
Step	Action
4	<p>The Award Administration screen <i>Administration</i> tab appears:</p>  <p>➤ Enter the CO (i.e. EBC)</p> <p>➤ Change the Award Date (Defaults to current date)</p> <p>➤ Enter the Signed On Date (i.e. use award date)</p> <p>➤ Enter the Start Date (i.e. use award date)</p> <p>➤ Enter the Expiration Date (i.e. date on PR)</p> <p>➤ Enter the Est. Ultimate Completion Date (i.e. date on PR + 5 years)</p> <p>➤ Verify the Vendor (i.e. 00010882 FUGRO EARTH DATA) if not there enter it</p> <p>➤ Enter the Business Size Indicator (i.e. other than small)</p> <p>➤ Click the <i>Properties</i> tab</p>

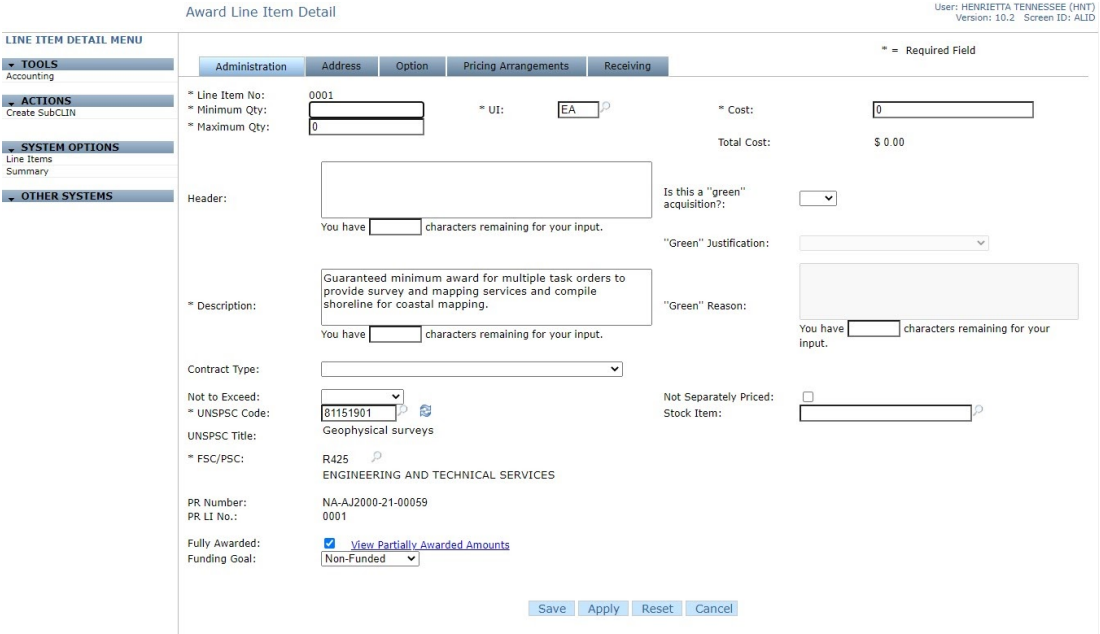
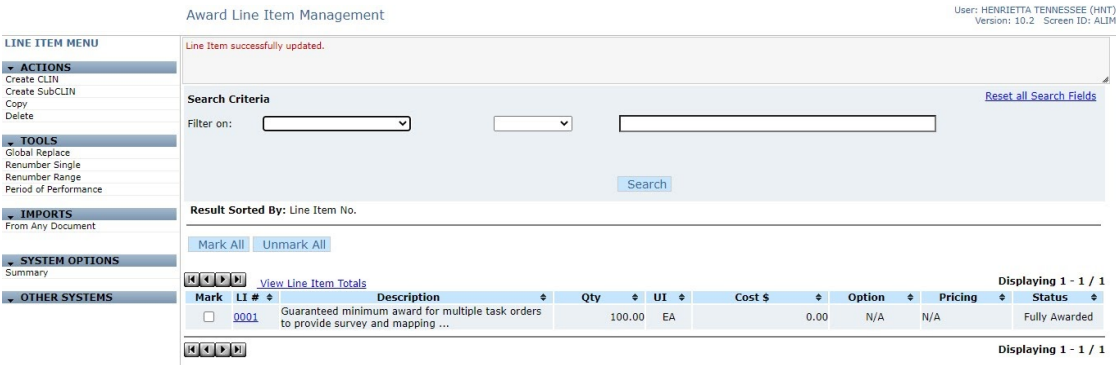
Step	Action
5	<p>The Award Administration screen <i>Properties</i> tab appears:</p> <p>The screenshot shows the 'Award Administration' screen with the 'Properties' tab selected. The interface includes a sidebar menu on the left and a main content area on the right. The main content area is divided into several sections:</p> <ul style="list-style-type: none"> AWARD SUMMARY MENU: A list of menu items including Administration, Accounting, Line Items, Clauses, Modifications, Totals, Forms, and Notes. SECTIONS: A list of sections including Administration, Accounting, Line Items, Clauses, Modifications, Totals, Forms, and Notes. PROPERTIES: A section containing fields for Delivery Information (Date: 10/30/2024, FOB Designation: Destination), Ship Via, Government Bill of Lading, and Lading. PROCUREMENT: A section containing fields for Other Information (UNSPSC Code: 81151901, FSC/PSC Code: R425 ENGINEERING AND TECHNICAL SERVICES, NAICS Code, NAICS Size Exception). REPORTING: A section containing fields for Additional Reporting, Sync Additional Reporting, FPDS-NG Report, Correct FPDS-NG Report, and Delete FPDS-NG Report. ACTIONS: A section containing fields for Assign PIIN, Check, Issue, Delete, Consolidate, Deconsolidate, Add To Hotlist, and Manage Reviewers/Approvers. FINANCIAL: A section containing fields for Vendor (DPAS Rating), Contractor sign checkbox, Number of copies to Issuing Office, and Invoice Copies. <p>The following actions are listed:</p> <ul style="list-style-type: none"> ➤ Change the Delivery Date (If needed) ➤ Change the FOB Designation (if needed) ➤ Enter the Ship Via: address (if needed) ➤ Enter the NAICS Code (i.e. 541360) ➤ Check the Contractor required to sign checkbox ➤ Enter the # of copies to Issuing Office (i.e. 1) ➤ Enter the # of Invoice Copies (i.e. 3) ➤ Click the <i>Addresses</i> tab


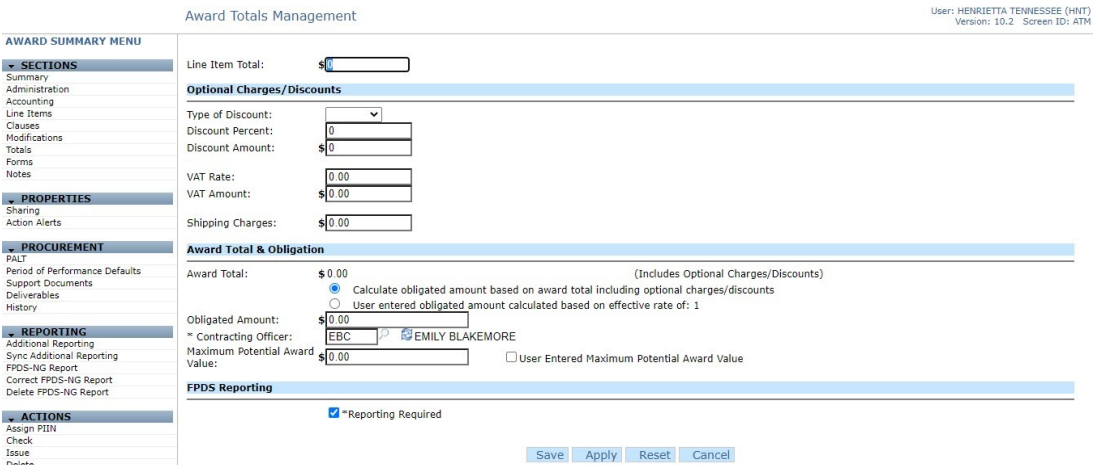
Step	Action
6	<p>The Award Administration screen <i>Addresses</i> tab opens:</p>  <p>If not added or needs to be changed:</p> <ul style="list-style-type: none"> ➤ Verify addresses and make changes where needed ➤ Click the <i>Funding</i> tab

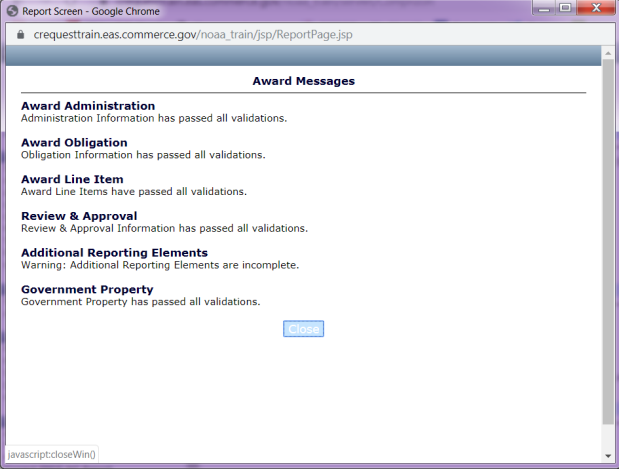
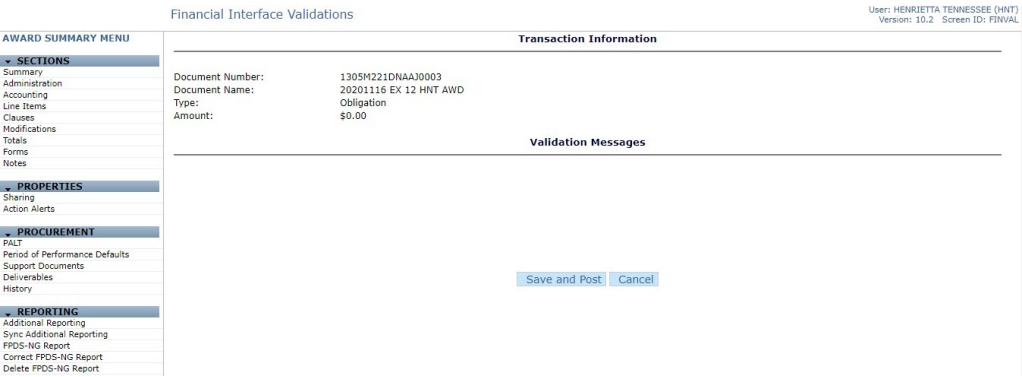
Step	Action
7	<p>The Award Administration screen <i>Funding</i> tab appears:</p>  <p>➤ Enter the # of days for Constructive Acceptance (i.e. 007)</p> <p>➤ Check the Subject to Prompt Pay checkbox</p> <p>➤ Select the Payment Type (i.e. EFT)</p> <p>➤ The Treasury Account Symbol defaults from PR</p> <p>➤ Click <i>Apply</i></p> <p>➤ Click the <i>Form Info</i> tab</p>

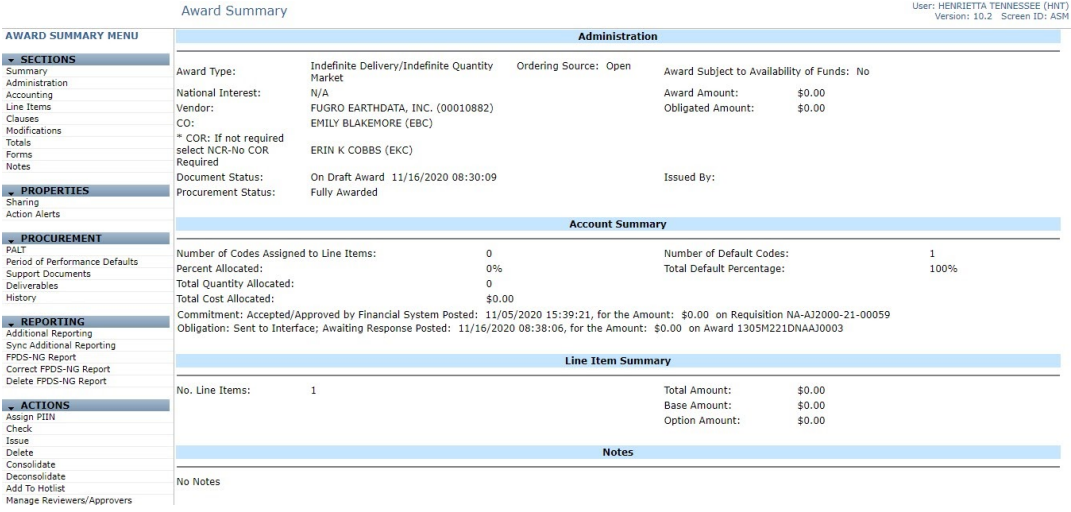
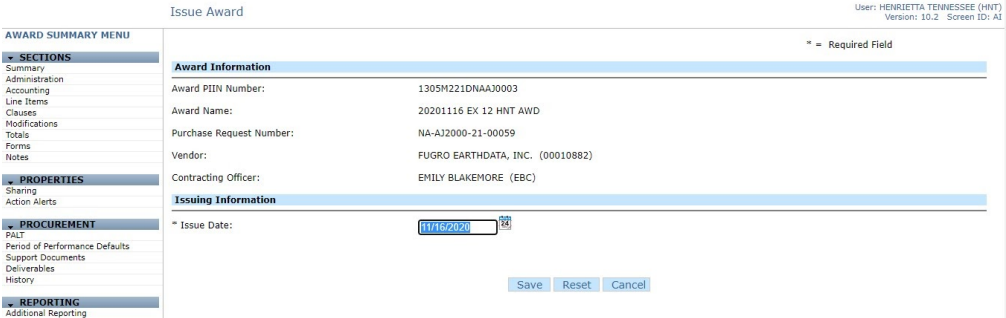
Step	Action
<p>8</p>	<p>The Award Administration screen <i>Form Info.</i> tab opens:</p>  <ul style="list-style-type: none"> ➤ Enter the Schedule B text (if needed) ➤ Attach a file (if needed) ➤ Choose the form: (i.e. SF1449) ➤ Click <i>Apply</i> ➤ Click the <i>Indefinite Contract</i> tab
<p>9</p>	<p>The Award Administration screen <i>Indefinite Contract</i> tab appears:</p>  <ul style="list-style-type: none"> ➤ Enter the Minimum Award Total per Delivery Order (i.e. 1000) ➤ Click <i>Save</i>

Step	Action																		
<p>10</p>	<p>The Award Summary screen appears:</p>  <p>The screenshot shows the 'Award Summary' screen with a left-hand menu and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, REPORTING, ACTIONS, and VENDOR. The main content area displays 'Award successfully updated.' and several summary sections: Administration (Award Type, National Interest, Vendor, CO, etc.), Account Summary (Number of Codes Assigned, Total Quantity Allocated, etc.), Line Item Summary (No. Line Items, Total Amount, etc.), and Notes (No Notes).</p> <p>➤ Click the <i>Line Items</i> menu option</p>																		
<p>11</p>	<p>The Award Line Item Management screen appears:</p>  <p>The screenshot shows the 'Award Line Item Management' screen. It features a search criteria section with filter dropdowns and a search button. Below this, it shows 'Result Sorted By: Line Item No.' and buttons for 'Mark All' and 'Unmark All'. A table displays line item details:</p> <table border="1"> <thead> <tr> <th>Mark</th> <th>LI #</th> <th>Description</th> <th>Qty</th> <th>UI</th> <th>Cost \$</th> <th>Option</th> <th>Pricing</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>0001</td> <td>Guaranteed minimum award for multiple task orders to provide survey and mapping ...</td> <td>0.00</td> <td>EA</td> <td>0.00</td> <td>N/A</td> <td>N/A</td> <td>Fully Awarded</td> </tr> </tbody> </table> <p>➤ Click the <i>Line Number</i> (i.e. 0001)</p>	Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Status	<input type="checkbox"/>	0001	Guaranteed minimum award for multiple task orders to provide survey and mapping ...	0.00	EA	0.00	N/A	N/A	Fully Awarded
Mark	LI #	Description	Qty	UI	Cost \$	Option	Pricing	Status											
<input type="checkbox"/>	0001	Guaranteed minimum award for multiple task orders to provide survey and mapping ...	0.00	EA	0.00	N/A	N/A	Fully Awarded											

Step	Action
<p>12</p>	<p>The Award Line Item Detail screen opens:</p>  <p>➤ Enter the Minimum Qty (i.e. 1)</p> <p>➤ Enter the Maximum Qty (i.e. 100)</p> <p>➤ Click <i>Save</i></p>
<p>13</p>	<p>The Award Line Item Management screen opens:</p>  <p>➤ Click the <i>Summary</i> menu option</p>

Step	Action
<p>14</p>	<p>The Award Summary screen appears:</p>  <p>The screenshot shows the 'Award Summary' screen with a left-hand menu and a main content area. The menu includes sections like SECTIONS, PROPERTIES, PROCUREMENT, REPORTING, and ACTIONS. The main content area is divided into several summary sections: Administration (Award Type, National Interest, Vendor, CO, etc.), Account Summary (Number of Codes Assigned, Percent Allocated, etc.), Line Item Summary (No. Line Items, Total Amount, etc.), and Notes. The 'Totals' menu option is highlighted in the left-hand menu.</p> <p>➤ Click the <i>Totals</i> menu option</p>
<p>15</p>	<p>The Award Totals Management screen opens:</p>  <p>The screenshot shows the 'Award Totals Management' screen. It features a left-hand menu and a main content area with several sections: Line Item Total (input field), Optional Charges/Discounts (Type of Discount, Discount Percent, etc.), Award Total & Obligation (Award Total, Obligated Amount, etc.), and FPDS Reporting (checkbox for Reporting Required). The 'FPDS Reporting' checkbox is checked. The 'Save' button is highlighted.</p> <p>➤ Validate the Award Totals</p> <p>➤ Uncheck the FPDS Reporting (for training purposes)</p> <p>➤ Click <i>Save</i></p> <p>➤ Click the <i>Check</i> menu option</p>

Step	Action
<p>16</p>	<p>A pop-up screen appears:</p>  <ul style="list-style-type: none"> ➤ Check for errors. If there are none, then continue ➤ Click <i>Close</i>
<p>17</p>	<p>For training purposes, we’re not routing to someone to obligate and issue the award, we will be doing that ourselves.</p> <ul style="list-style-type: none"> ➤ Click the <i>Obligate</i> menu option ➤ Close out the pop-up  <ul style="list-style-type: none"> ➤ Click <i>Save and Post</i> if no errors

Step	Action
<p>18</p>	<p>The Award Summary screen opens:</p>  <p>The screenshot shows the 'Award Summary' interface. On the left is a navigation menu with categories: SECTIONS (Summary, Administration, Accounting, Line Items, Clauses, Modifications, Totals, Forms, Notes), PROPERTIES (Sharing, Action Alerts), PROCUREMENT (PALT, Period of Performance Defaults, Support Documents, Deliverables, History), REPORTING (Additional Reporting, Sync Additional Reporting, FPDS-NG Report, Correct FPDS-NG Report, Delete FPDS-NG Report), and ACTIONS (Assign PIIN, Check, Issue, Delete, Consolidate, Deconsolidate, Add To Hotlist, Manage Reviewers/Approvers). The main content area is divided into sections: Administration (Award Type, National Interest, Vendor, CO, Document Status, Procurement Status), Account Summary (Number of Codes Assigned to Line Items, Percent Allocated, Total Quantity Allocated, Total Cost Allocated, Commitment/Approval info), Line Item Summary (No. Line Items, Total Amount, Base Amount, Option Amount), and Notes (No Notes).</p> <p>It takes some time for the interface to change from Sent to Interface to Accepted/Approved.</p> <ul style="list-style-type: none"> ➤ Click the <i>Issue</i> menu option once the Obligation is Accepted/Approved ➤ Close the pop-up
<p>19</p>	<p>A pop-up screen comes up, click close. The Issue Award screen opens:</p>  <p>The screenshot shows the 'Issue Award' pop-up screen. It has a navigation menu on the left similar to the previous screen. The main content area is divided into sections: Award Information (Award PIIN Number, Award Name, Purchase Request Number, Vendor) and Issuing Information (Contracting Officer, Issue Date). The Issue Date field is highlighted with a blue border and contains the date 11/16/2020. At the bottom right, there are 'Save', 'Reset', and 'Cancel' buttons.</p> <ul style="list-style-type: none"> ➤ Change the Issue date (if needed) ➤ Click <i>Save</i>

Step	Action
20	<p>The Award Summary screen appears with the following message:</p> <div data-bbox="310 394 732 478" style="border: 1px solid gray; padding: 5px; margin: 10px 0;"><p>Award successfully issued.</p></div> <p>Make note of the Award Number for any Task/Delivery Orders.</p>

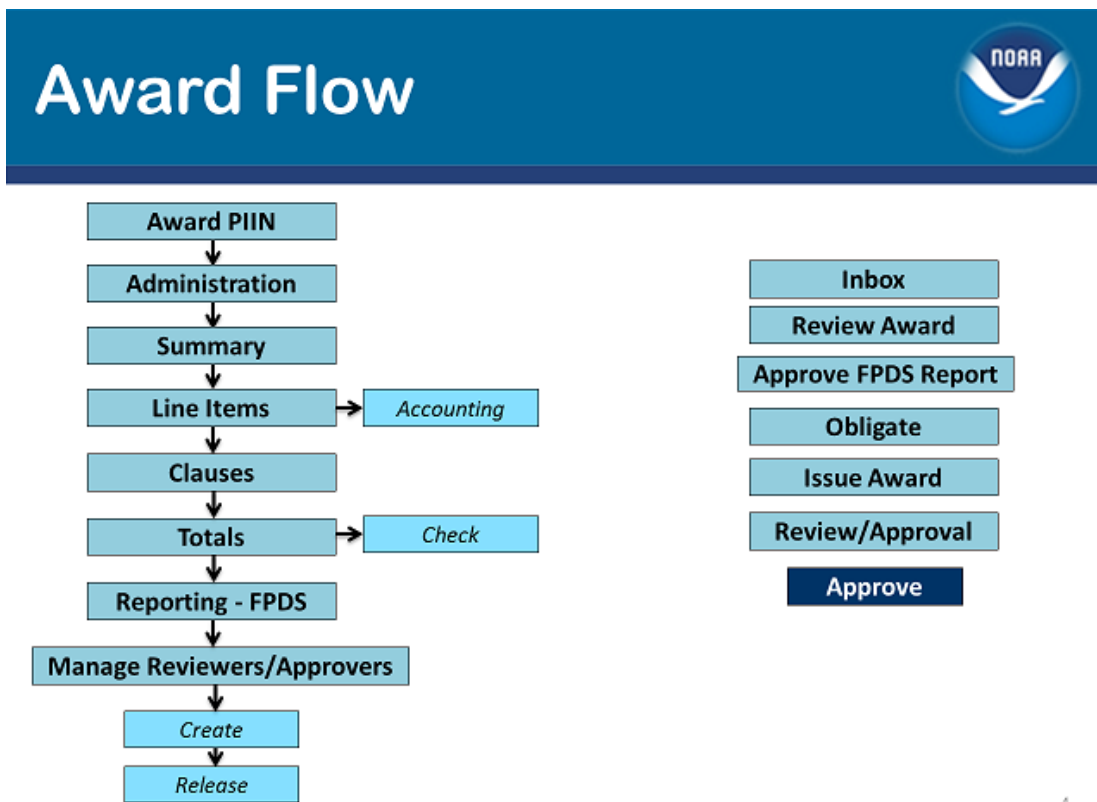
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Exercise #13: Create a Task Order

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

Instructions: Execute the following steps:

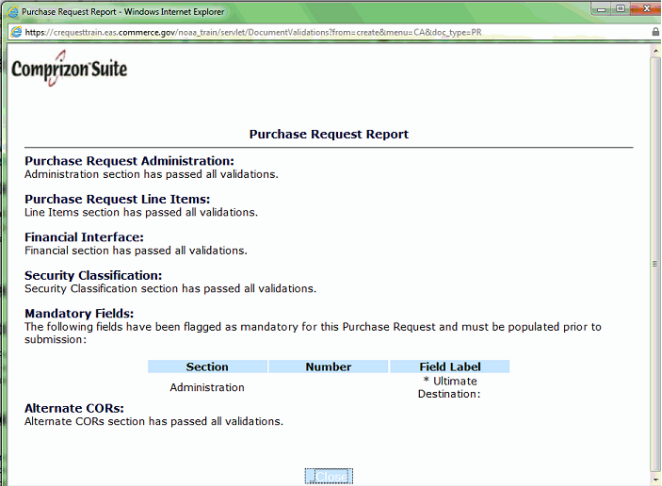
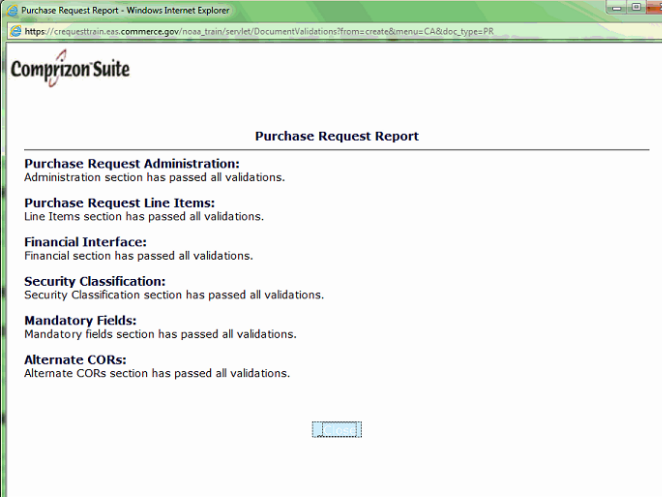
Notes: You need to set up a task order against a base award to provide shoreline mapping services. The Task Order will have both a quantity and Award Amount that meets the minimum and maximum amounts set out on the base award.

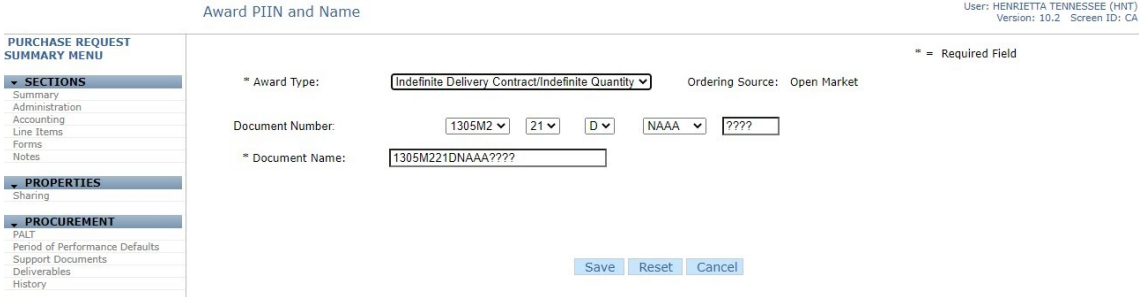


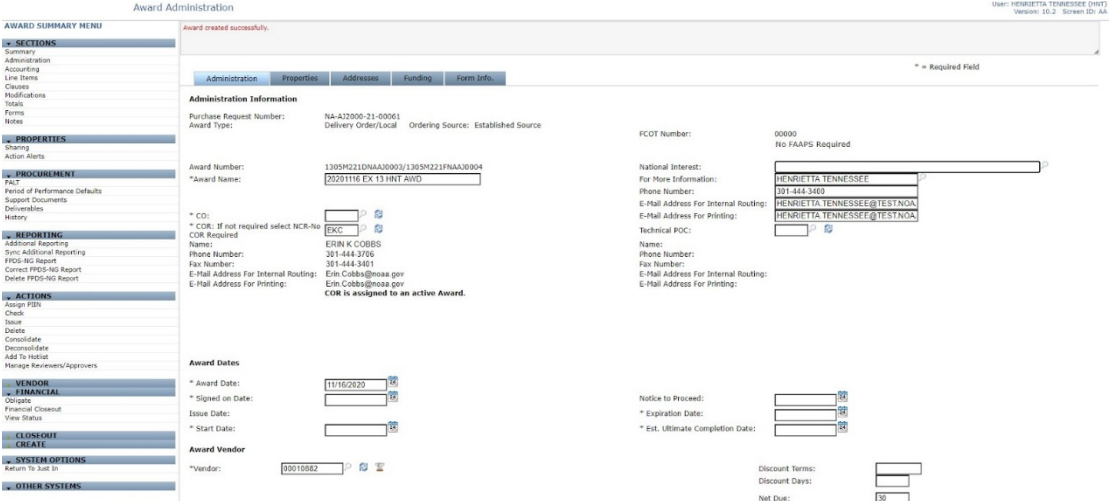
4

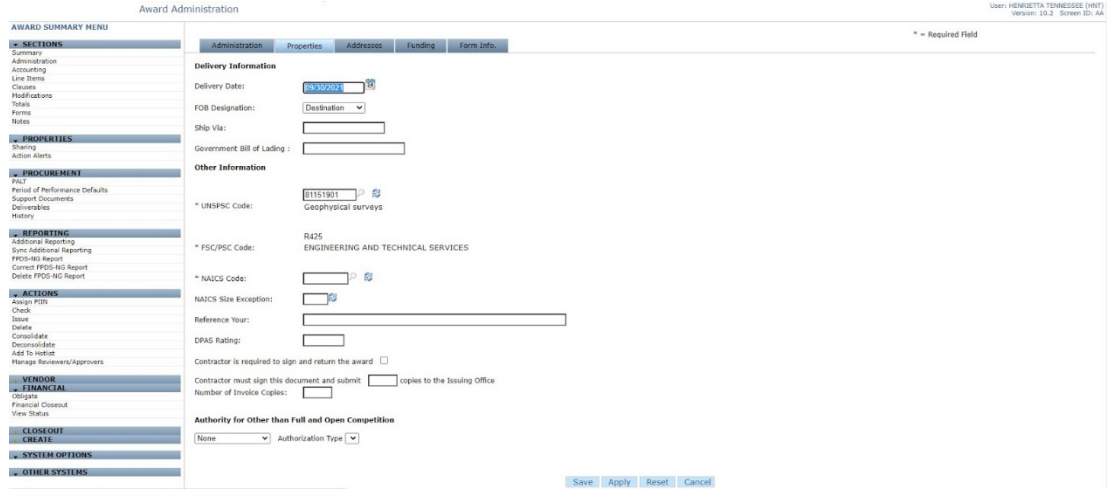
NOTE: For this training example, we will be skipping the solicitation & clauses.

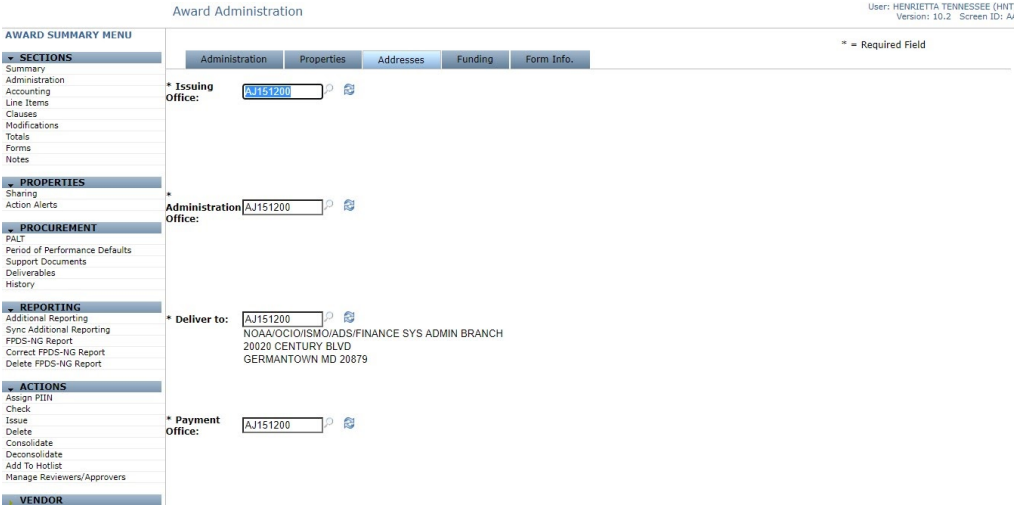
Step	Action
1	From the Home screen, click the <i>Just In</i> tab. <ul style="list-style-type: none">➤ Click the <i>PR#</i>➤ Review the PR in its entirety.
1a	If the PR looks good, then you will need to: <ul style="list-style-type: none">➤ Click the <i>Create Award</i> menu option

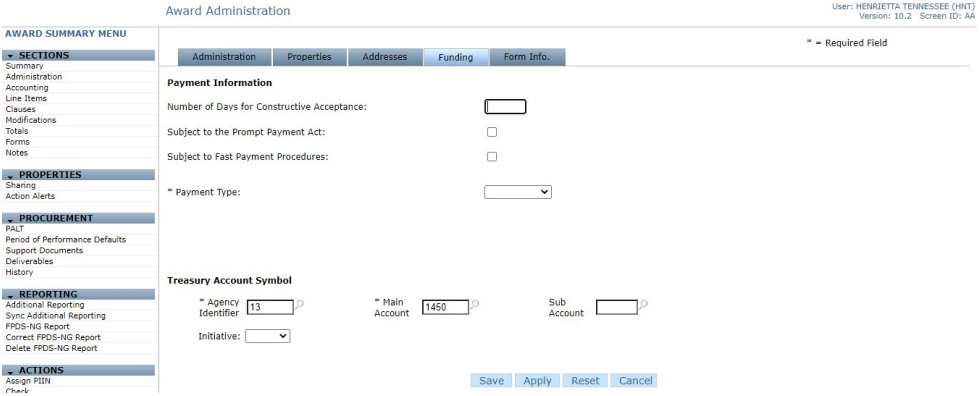
Step	Action
2	<p>The Purchase Request Report pop-up window opens. If something doesn't pass validation, you will receive a message like this:</p>  <p>If it passes, it might appear briefly looking like this:</p>  <p>You'll want to close it out to do so:</p> <ul style="list-style-type: none"> ➤ Maximize the minimized window ➤ Click <i>Close</i>

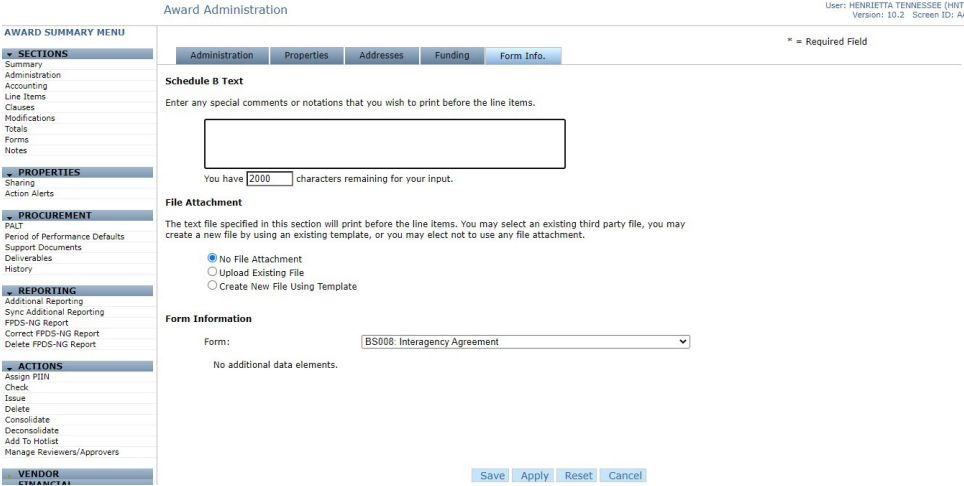

Step	Action
3	<p>The Award PIIN and Name screen opens:</p>  <p>The screenshot shows the 'Award PIIN and Name' screen. On the left is a sidebar menu with sections: SECTIONS (Summary, Administration, Accounting, Line Items, Forms, Notes), PROPERTIES (Sharing), and PROCUREMENT (PALT, Period of Performance Defaults, Support Documents, Deliverables, History). The main area contains form fields: 'Award Type' (dropdown: Indefinite Delivery Contract/Indefinite Quantity), 'Ordering Source' (Open Market), 'Document Number' (fields: 1305M2, 21, D, NAAA, ???), and 'Document Name' (field: 1305M221DNAAA????). Buttons for Save, Reset, and Cancel are at the bottom. A legend indicates '*' = Required Field.</p> <ul style="list-style-type: none"> ➤ Select the Award type (i.e. Delivery Order/Local) ➤ Enter the Base Contract Number (i.e. Use Exercise 12 award number) ➤ Enter the Delivery Order Number (i.e. 1305M2-FY-F-####-???) ➤ Type in the Document Name (i.e. {date} EX 13 {TRAINING INITIALS} AWD) ➤ Click <i>Save</i>

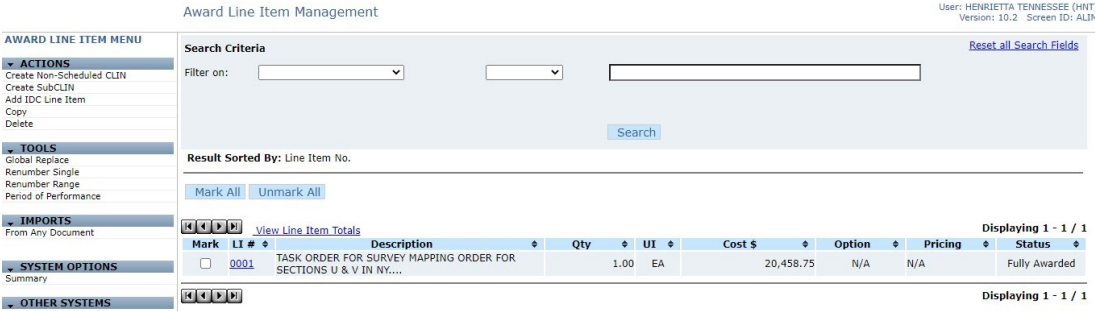
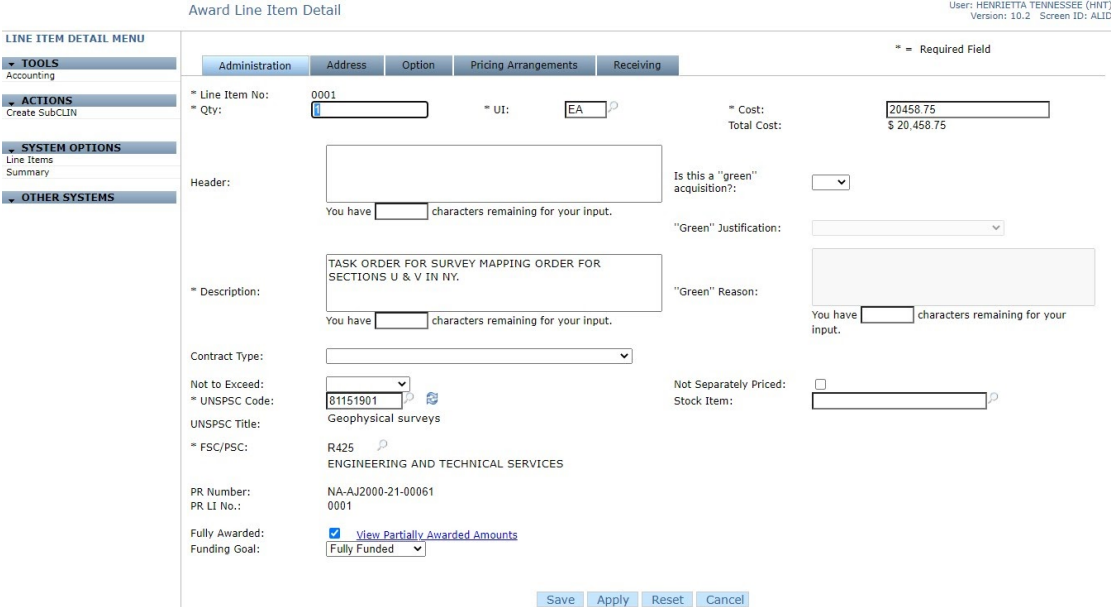
Step	Action
4	<p>The Award Administration screen <i>Administration</i> tab appears:</p>  <p>The screenshot shows the 'Award Administration' screen with the 'Administration' tab selected. The 'Award Information' section is visible, containing fields for Purchase Request Number (NA-42200-21-00061), Award Type (Delivery Order/Local), Ordering Source (Established Source), FCOT Number (0000), and No FAAPS Required. The Award Number is 130592210NAA00003/13059221FNA00004, and the Award Name is 2020116 EX T3 INT AWD. The Vendor is ERN K COBBS, with contact information for Erin Cobbs. The Award Date is 11/16/2020, and the Signed On Date is also 11/16/2020. The Start Date is blank, and the Expiration Date is blank. The Est. Ultimate Completion Date is blank. The Vendor field is populated with 0901082. The screen also shows a 'National Interest' field with 'HENRIETTA TENNESSEE' and a 'Technical POC' field with 'HENRIETTA TENNESSEE@TEST.NOA'.</p> <ul style="list-style-type: none"> ➤ Enter the CO (i.e. EBC) ➤ Change the Award Date (Defaults to current date) ➤ Enter the Signed On Date (i.e. use award date) ➤ Enter the Start Date (i.e. use award date) ➤ Enter the Expiration Date (i.e. date on PR) ➤ Enter the Est. Ultimate Completion Date (i.e. date on PR) ➤ Enter the Vendor (i.e. should already be filled in but need to refresh) ➤ Enter the Business Size Indicator (i.e. Other than Small) ➤ Click the <i>Properties</i> tab

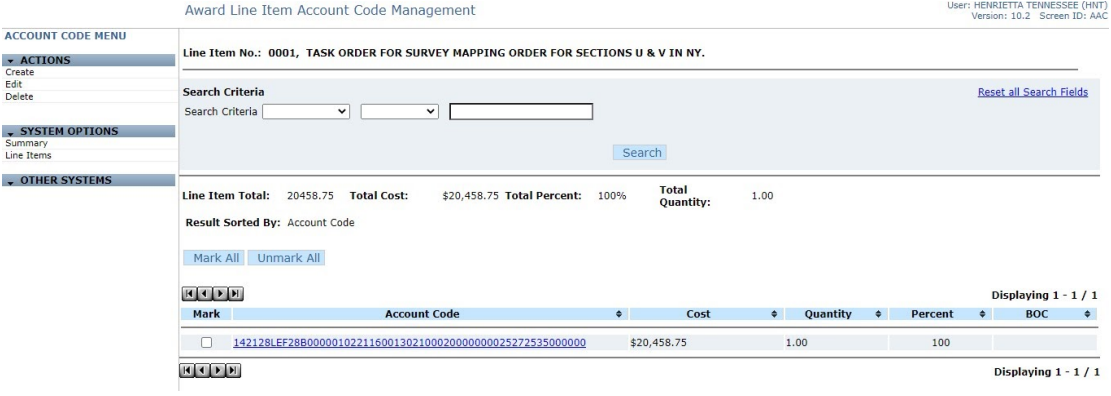
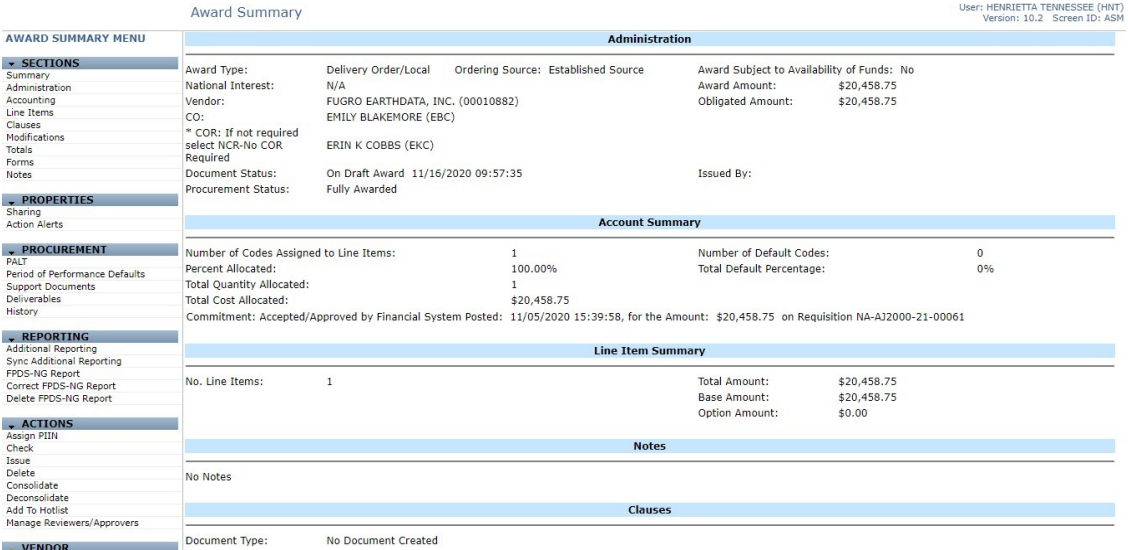
Step	Action
5	<p>The Award Administration screen <i>Properties</i> tab appears:</p>  <ul style="list-style-type: none"> ➤ Change the Delivery Date (if needed) ➤ Change the FOB Designation (if needed) ➤ Enter the Ship Via: address (if needed) ➤ Enter the NAICS Code (i.e. 541360) ➤ Check the Contractor required to sign box ➤ Enter the # of copies to Issuing Office (i.e. 1) ➤ Enter the # of Invoice Copies (i.e. 3) ➤ Click the <i>Addresses</i> tab

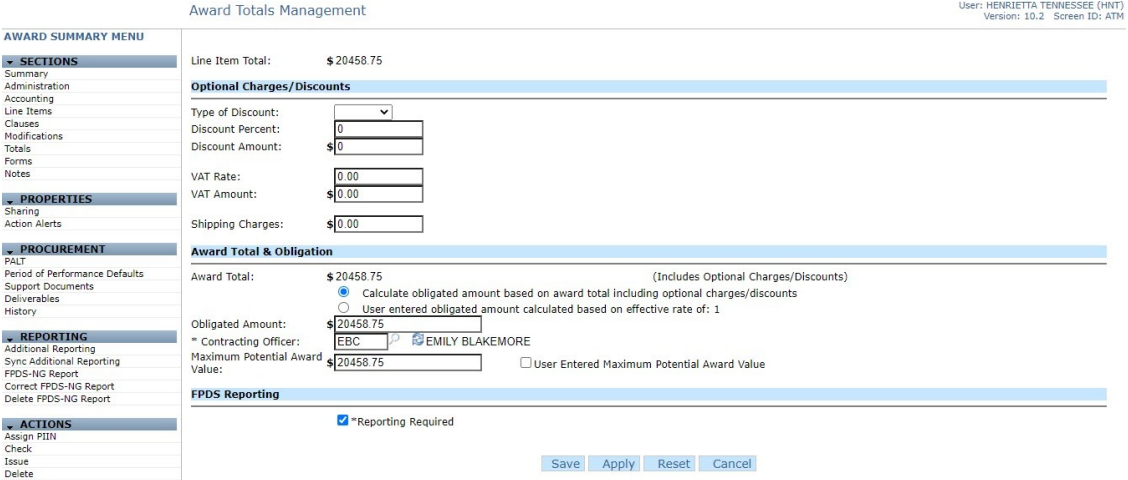
Step	Action
6	<p>The Award Administration screen <i>Addresses</i> tab appears:</p>  <p>If not added or needs to be changed:</p> <ul style="list-style-type: none"> ➤ Verify address and make changes where necessary ➤ Click the <i>Funding</i> tab

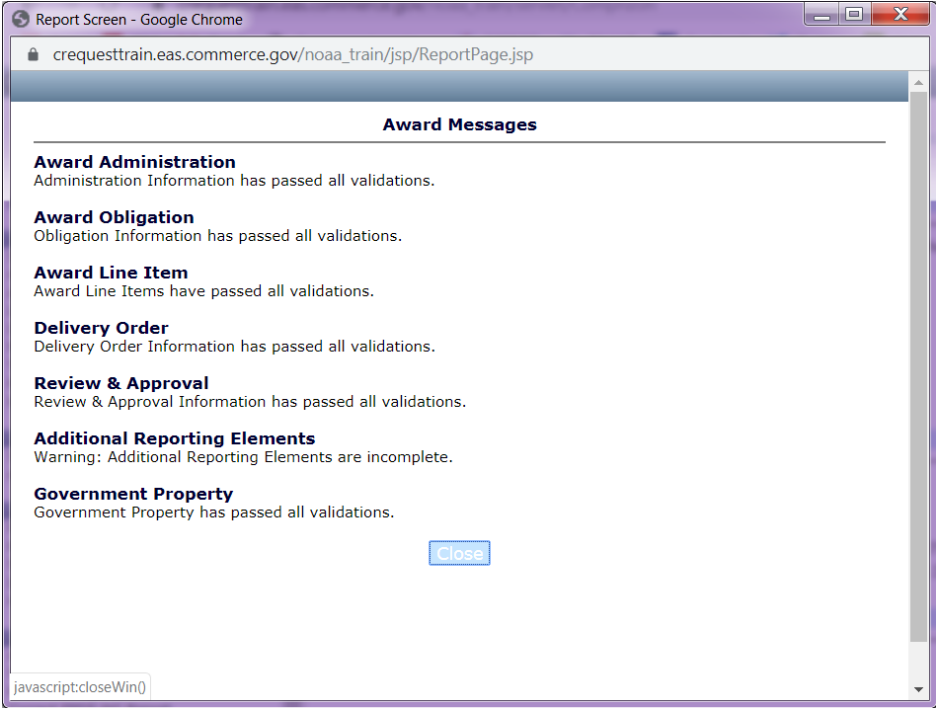
Step	Action
7	<p>The Award Administration screen <i>Funding</i> tab opens:</p>  <ul style="list-style-type: none"> ➤ Enter the # of days for Constructive Acceptance (i.e. 007) ➤ Check the Subject to Prompt Pay box ➤ Select the Payment Type (i.e. EFT) ➤ The Treasury Account Symbol defaults from the PR ➤ Click the <i>Form Info</i> tab

Step	Action
<p>8</p>	<p>The Award Administration screen <i>Form Info.</i> tab appears:</p>  <p>➤ Enter the Schedule B text (if needed)</p> <p>➤ Attach a file (if needed)</p> <p>➤ Choose the form: (i.e. OF347)</p> <p>➤ Click <i>Save</i></p>
<p>9</p>	<p>The Award Summary screen appears:</p>  <p>➤ Click the <i>Line Items</i> menu option</p>

Step	Action
<p>10</p>	<p>The Award Line Item Management screen opens:</p>  <p>➤ Click the <i>Line Item Number</i> (i.e. 0001)</p>
<p>11</p>	<p>The Award Line Item Detail screen opens:</p>  <p>➤ Verify the amount, and make changes if necessary. (Just remember that the total award amount needs to be more than the minimum on the base and the line quantities must fall between the minimum and maximum on the base.)</p> <p>➤ Click <i>Apply</i></p> <p>➤ Click the <i>Accounting</i> menu option</p>

Step	Action
<p>12</p>	<p>The Award Line Item Account Management screen appears:</p>  <p>➤ Verify the accounting (especially if you made changes to the line amount)</p> <p>➤ Click the <i>Summary</i> menu option</p>
<p>13</p>	<p>The Award Summary screen opens:</p>  <p>➤ Click the <i>Totals</i> menu option</p>

Step	Action
14	<p>The Award Totals Management screen opens:</p>  <p>➤ Validate the Award Totals</p> <p>➤ Uncheck the FPDS Reporting (for training purposes ONLY)</p> <p>➤ Click <i>Save</i></p> <p>➤ Click the <i>Check</i> menu option</p>

Step	Action
15	<p>A pop-up screen opens:</p>  <ul style="list-style-type: none"> ➤ Check for errors. If there are none, then continue ➤ Click <i>Close</i>
16	<ul style="list-style-type: none"> ➤ Set up the reviewer(s) and approver(s) ➤ Release the document to them ➤ At this point, following the flow chart, the approver must complete the process ➤ Click Home from the <i>Standard Menu Bar</i>