



PD² Things You Should Know

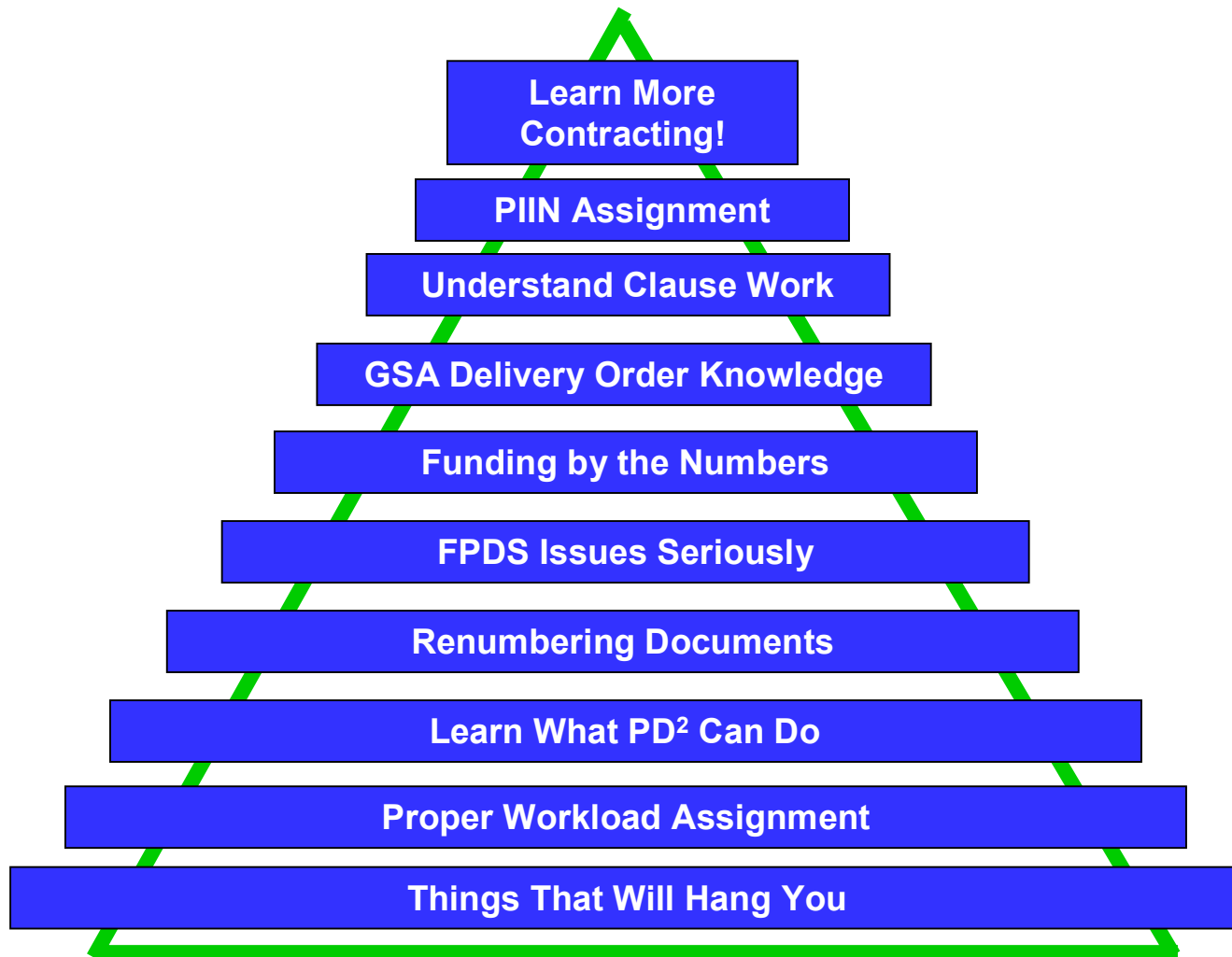
Presented by Julian (J.W.) Wilson
Defense Procurement E-Business Conference
6-8 April 2009



- **Introductions**
- **PD² Things You Should Know**
- **Questions**



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Do books have even number pages on the left or the right?

Which way does water go down the drain?

On which side of a woman's blouse are the buttons?

On the US Flag, is the top stripe Red, White, or Blue?



LEARN MORE CONTRACTING!

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IDIQ

2009 DENVER



INDEFINITE DELIVERY

Requirements

Indefinite Quantity

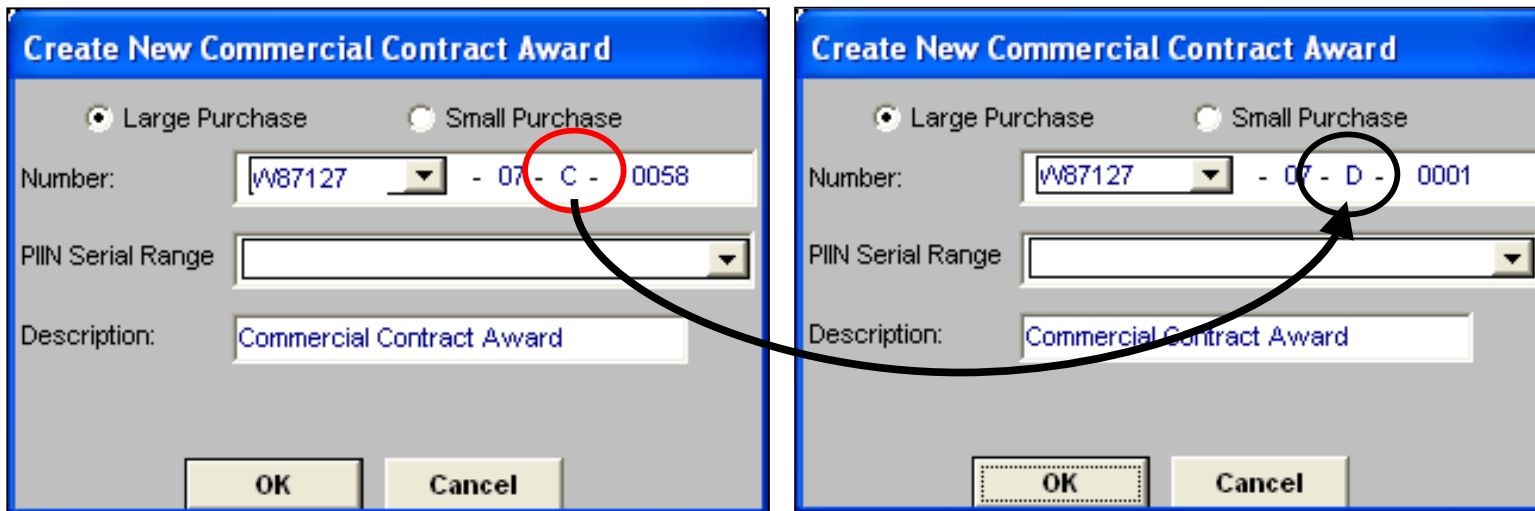
Definite Quantity



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PIIN ASSIGNMENT

The 9th Digit (Instrument Type)



Two screenshots of the "Create New Commercial Contract Award" form are shown side-by-side. Both forms have "Large Purchase" selected. The left form shows a contract number of "W87127 - 07 - C - 0058", with the "C" circled in red. The right form shows a contract number of "W87127 - 07 - D - 0001", with the "D" circled in black. A curved arrow points from the "C" in the left form to the "D" in the right form. Both forms have "Commercial Contract Award" in the description field and "OK" and "Cancel" buttons at the bottom.

- **DFARS 204.7003(a)(3)**
- When creating an **ID** contract in PD², to allow for proper FPDS-NG reporting, make sure to use the proper numbering scheme by manually changing the ninth digit of the contract number from a 'C' to a 'D'. The serial number will automatically change to reflect the next number for that instrument.



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Create New Simplified Acquisition

Number:

W87127 - 07 - A - 0001

PIIN Serial Range

Description:

Simplified Acquisition

OK

Cancel



UNDERSTAND CLAUSE WORK

Building Local Clauses

- For use with Clause Logic requires 6 steps:
 - Create the Clause
 - Import the clause into PD²
 - Decide your clause insertion method
 - If necessary, build a Characteristic
 - Build a Clause Rule
 - Associate the Rule to the New Clause



USE INCLUSION AND EXCLUSION

“Piggy Back”

Rule	Data Criteria	Characteristic	Clause Inclusion	SQL Criteria
Condition AND <input type="radio"/> OR <input checked="" type="radio"/>				
Clause Number	Clause Title			
252.225-7021	<input type="radio"/> Present	<input checked="" type="radio"/> Not Present	Trade Agreements	
252.225-7036	<input type="radio"/> Present	<input checked="" type="radio"/> Not Present	Buy American--Free Trade Agreement--Balance of Payments Program	
252.225-7036 Alt I	<input checked="" type="radio"/> Present	<input type="radio"/> Not Present	Buy American--Free Trade Agreement--Balance of Payments Program (Oct 2006) Alternate 1	



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Add Text is **NOT** Clause Insertion!





GSA DELIVERY ORDER KNOWLEDGE



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Delivery Order (DD 1155) - W91234-07-F-0001

Items 1 - 13 | Items 14 - 16 | Items 17 - 25 | Clauses

ORDER FOR SUPPLIES OR SERVICE!		PAGE 1 OF <input type="text"/>
1. CONTRACT/PURCHASE ORDER/AGREEMENT NO GS02F38155	2. DELIVERY ORDER/ CALL NO. W91234-07-F-0001	3. DATE OF ORDER/ CALL <input type="text"/>
4. REQUISITION / PR NO.:		5. PRIORITY <input type="text"/>
6. ISSUED BY	7. ADMINISTERED BY	8. DELIVERY

Commercial Delivery Order (SF 1449) - W91234-07-F-0001

Items 1 - 16 | Items 17 - 26 | Items 27 - 31 | Clauses

SOLICITATION/ CONTRACT/ ORDER FOR COMMERCIAL ITEMS	1. REQUISITION NUMBER		PAGE 1 OF <input type="text"/> PAGES
	2. CONTRACT NUMBER GS07F0077H		3. AWARD/EFFECTIVE DATE <input type="text"/>
	4. ORDER NUMBER W91234-07-F-0001	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE
	7. FOR SOLICITATION INFORMATION CALL:	A. NAME	B. TELEPHONE NO <input type="text"/>
		<input type="button" value="Add"/>	8. OFFER DUE DATE/LOCAL TIME



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- **If an invalid number is entered into the GSA number drop-down list, FPDS-NG will not recognize it.**
- **If an order is to be placed against another DoD agency's Contract (including BPAs), it should NOT be an 'F' order. The contract should be entered as an External Award/Agreement and an External Delivery Order should be issued against it.**
- **Note: To change the GSA number, call the SPS Help Desk.**



FUNDING BY THE NUMBERS



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- **SORRY! Contract-level funding is dead!— DFAS requires Line Item-level funding.**
- **Commitment Identification Number (CIN) — It is the PR number followed by the specific line item number from which funds will be used. Must be exact or thirty zeroes.**
- **COST OR PRICE VS FUNDING**
- **LEARN MORE CONTRACTING!**
- **PD² Can't do true incremental funding... Is PD² broken?**
- **Integrity Tool version ?? Keep in mind that only the authors can make changes to the Integrity Tool, not the help desk.**



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FPDS ISSUES SERIOUSLY



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Go to the FPDS Class!



RENUMBERING DOCUMENTS



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POTENTIAL

Not Everyone Gets to be in Contracting When They Graduate College

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- **To help alleviate issues, be sure to Print Preview your document and run all pre-approval checks prior to release**
- **To expedite the process, gather and provide the following information when calling in a Renumbering Service Request:**
 - **Released Date of the document**
 - **Current incorrect document number**
 - **Corrected document number**
 - **Results of the Script-Aid Retrieve Document Information (RDI) script for the document in question**
 - **Has document been transmitted via EDA or any other source?**
 - **Has payment been made against document by DFAS or any other pay office?**



LEARN WHAT PD² CAN DO!



**TRACKING SOURCE FOR CLOSEOUT
T4C AND T4D RECORDED IN VENDOR
RECORD
USE CANCELLATION
NEW SR 10 STUFF**



PROPER WORKLOAD ASSIGNMENT



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Procurement Desktop - Defense

File Edit Procurement Reference Utilities Window Help

Workload Assignment

Assignment

Assign To:

Active Users	
pduser11	Pduser Eleven
lorie42	Lorie Higgins
pduser1	Pduser One

Assignment Information:

Assigned by: lorie42
 Priority: Normal
 PALT Code: Cont-02
 No. of Days: 162
 Days Stopped: 0
 Description: Workload Assignment from lorie42

Dates:

Assigned: 02 Mar 04 20:57:40
 Received:
 Start: 02 Mar 04 20:57:40
 End: 11 Aug 04 20:57:40
 Act. End:

Assigned Items

<input checked="" type="checkbox"/>	WORKLOAD MGMT	Add
<input checked="" type="checkbox"/>	Copy of MARIA TEST	
	Purchase Request	Remove
<input checked="" type="checkbox"/>	Master Document Action Type: Award	

User Workload
 User Expertise
 Suggest PALT

OK Cancel

What's wrong here and what's right here?



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- **Helpful Hints**

- **Do not take PR(s) out of the blue folder from the Master PR. You can create more than one contract with the PRs in the blue folder.**
- **Do not rename the Workload Folder once it has been assigned. The Assigner can edit/change the description in the Workload Assignment window.**
- **Do not route workload assignment PR(s) to another user.**
- **Only the assigned user can complete the workload assignment. If there is a need to have another user complete the workload assignment, the blue folder must be sent back to the individual who originally assigned the PR for re-assignment to another user. The assigner will open the blue folder and select the document(s) it contains, and re-assign the PR(s).**
- **If the workload assignment has been completed, and the blue folder has not turned yellow, there is a script in Script-Aid that can complete the workload assignment and stop the PALT. OR...**



THINGS THAT WILL HANG YOU



USING BPA CALLS AS CONTRACTS

USING MODS AS CONTRACTS

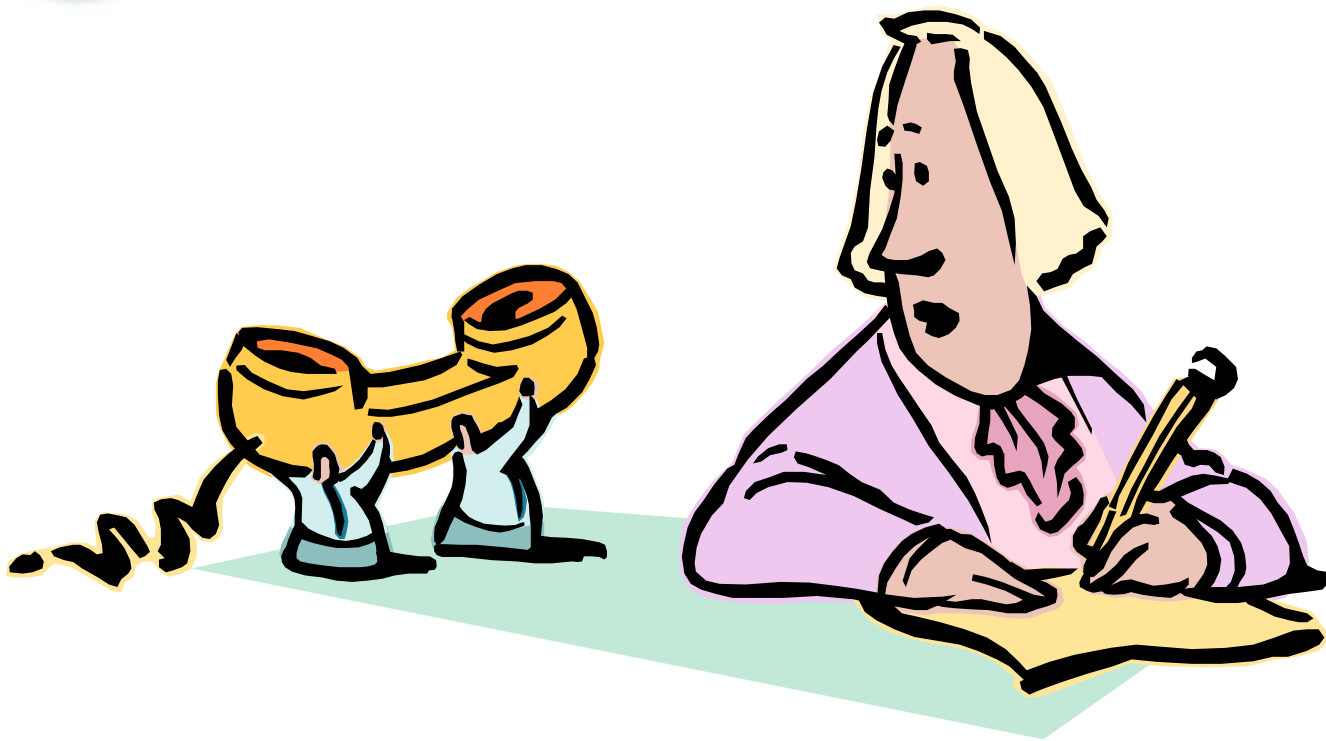
MODIFYING BPA CALLS

PUTTING OPTIONS IN CALLS

USING WRONG CONTRACT INSTRUMENTS



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QUESTIONS? YOU KNOW WHO TO CALL