



Creating A&E Contracts

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1. CREATING THE A&E CONTRACT

1.1 The SF252 Document

To begin creating the **SF 252**, select **Procurement → Pre-Award/Award → Award → Architect-Engineer Contract (SF 252)**. The form is comprised of Items 1-12 and a section for clauses.

Go through each of the tabs and fill out any applicable information. Important areas to fill out are:

- *Items 1-5* tab: Enter the Effective date in block 2.
- *Items 6-9* tab: Enter the line item information.

There is no **Requisition Number** or **Solicitation Number** field. By design a **SF 252** cannot be built from a **PR** or **Solicitation**.

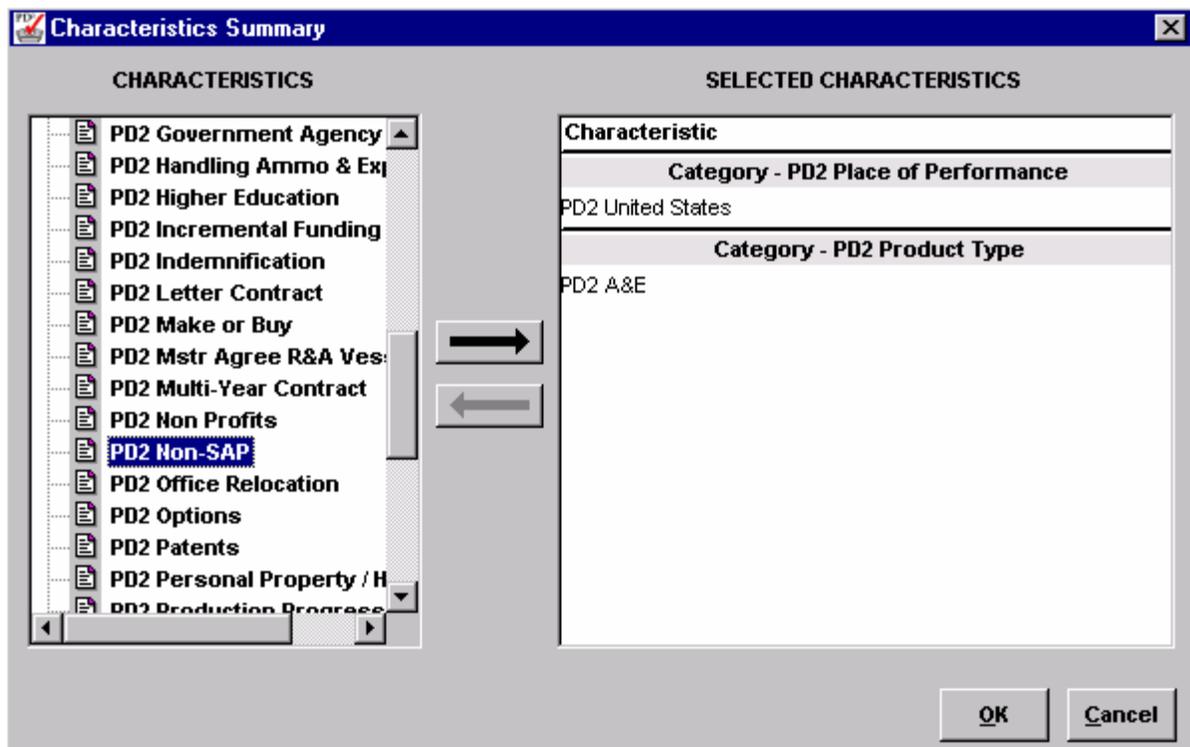
Note: In order to attach CLINs from a **PR** or solicitation, open the **SF 252**, and select **Line Item → Attach**. Search for and select the appropriate **PR** or solicitation. In the **Attachment Selection** window search for the **PR** or solicitation, highlight it and click the **[Attach]** button.

1.2 Adding Clauses

1.2.1 Characteristics

To add clauses, using **Auto Clause Selection**, select **Document Options → Characteristics**. See pages 3-29-3-22 in the *System Administration-Version 4.1 Student Guide* for instruction on how to create, edit and delete categories in the **Chars** Task in **System Administration**.

There are two panels in the **Characteristics** window. The characteristics that are designated for the solicitation are listed in the *Selected Characteristics* panel on the right side of the window. To select a characteristic from the *Characteristics* panel on the left side of the window, double-click on the folder icons to open them. A list of characteristics display below the folder icon. Click the right **[→]** arrow button, to move the highlighted characteristic to the *Selected Characteristics* panel. Click **[OK]** to save the selection.



Without being selected in the **Characteristics** window, PD² recognizes the following characteristics for all contracts:

- SAP
- Full and Open Competition
- Performance in the USA
- Full Funding

Therefore, if the **SF 252** does not fit these criteria, select the appropriate topics in the **Characteristics** window, in order to guarantee that all applicable clauses are selected during auto-clause selection.

Note: Select **Non-SAP** from the **Other PD²** folder for **SF 252** contracts. Also, select **A&E** from the **Product Type** folder.

1.2.2 Classification

After saving changes in the **Characteristics** window, select **Document Options** → **Classification** to add additional information to the document. Enter the format in the **Document Format** field. The format is not editable in the modification to the **SF 252**, once it has been selected in the **Classification** window on the **SF 252**.

IDC Constraints		
	Minimum	Maximum
Contract Quantity:		
Contract Amount:		
Order Quantity:		
Order Amount:		

Note: Select the **Construction/A&E** radio button under the heading **Contract Category**. Select **A&E** in the **Contract Sub-Category** list box.

1.2.3 Auto-Select Clauses

Select **Document Options** → **Auto-Selection Clauses** to run auto-clause selection. When prompted to save the document before selection begins, click **[OK]**. PD² will retrieve a list of clauses that are applicable to this award based upon the criteria entered in the **Characteristics** and **Classification** windows. In the **Select Clauses** window, only select those clauses that are applicable. Click the **[Select All]** button to select the checkboxes for all clauses listed. Click the **[Clear All]** button to deselect the checkboxes for all clauses listed. When **[OK]** is clicked, all clauses in which the checkboxes are selected will display in the *Clauses* tab. See pages 133-136 in the *Procurement Desktop-Defense User's Guide, Version 4.1* for additional instruction in adding and deleting automatically selected clauses, and re-running auto-clause selection.

1.2.4 Manually Added Clauses

Select the *Clauses* tab and click the **[Add Clause]** button to add clauses to appropriated sections. To add text (i.e., Statements of Work) to appropriated sections by clicking the **[Add Text]** button.

1.3 Generating

Open the document, and select **Document Options** → **Generate CLINs** to generate CLINs. Select **Document Options** → **Generate Section J** to generate Section J if **Attachments** are associated with the award. See <http://kb.amsinc.com/ID/37748> for additional instruction in adding **Attachments** to Section J. Select **Document Options** → **Generate Document** to generate the document.

Note: If changes are made to the CLINs or the document after the document been generated, regenerate the CLINs and document. The changes will only be incorporated into the final *generated* document.

Save and close the document.

1.4 Approve and Release

To approve and release the **SF 252**, highlight the document icon and select the red approval checkmark in the toolbar. In the **Approval** window, select the **Contract Award Approval** template in the **Approval Template** window. Click **[OK]**.

Note: In the **Approval Sheet** window, run pre-approval checks before approving the document. To do this, click the **[Preapproval]** button on the top right-hand corner of the window. Select **Approved** from the **Approval Types** drop-down list box to approve the document. Click **[OK]** to save the approval.

Once a document is approved, it is not editable. To un-approve a document, reopen the **Approval Sheet** window, add a new approval sheet, and click **[OK]** before selecting **Approved** from the **Approval Types** drop-down list box.

Note: If more than one signature is needed for this award route the document to obtain the other signatures. To route the document, highlight the document icon and select the mail slot icon on your toolbar. Then select the names of the applicable people and route the document. Refer to pages 48-54 in the *Procurement Desktop-Defense User Manual, v.4.1* for additional instruction on routing and approving documents.

Once the document is fully approved, it can be released. To release this document, select **Procurement → Pre-Award/Award → Awards → Release Award**. Once the document is released, it is indelible. To change or update a released document create a modification.

Note: Only users with a sufficient warrant may release documents. Refer to page 173 in the *Procurement Desktop-Defense User's Manual, v.4.1* for a list of validations PD² runs when a document is released. If all these criteria are not met, the document will not release.
