



Basic Ordering Agreements

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1. INTRODUCTION

One of the main differences between Basic Agreements (**BA**) and Basic Ordering Agreements (**BOA**) is that contracts are issued against **BAs**, and delivery orders are issued against **BOAs**. **BAs** contain clauses, while **BOAs** provide a description of supplies/services, pricing arrangements, terms, and clauses. All of the rules and procedures used for soliciting and awarding against these agreements are the same as regular competitive/noncompetitive contracts. Agreements eliminate the need for renegotiating terms and/or clauses and controversies associated with said terms and/or clauses on an individual basis.

BAs functionality is not available PD² v4.1e, but will be available PD² v4.2. It is not possible to create a contract off of a **BA** in any available version of PD².

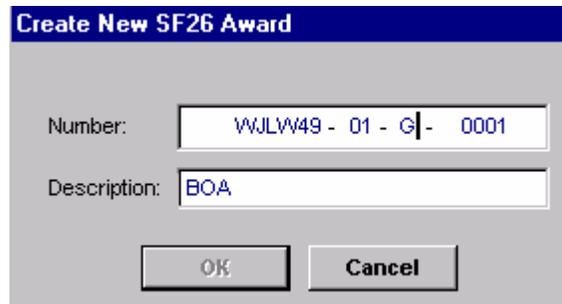
2. CREATING A BASIC ORDERING AGREEMENT

2.1 Creating the Award

A **BOA** may be created from any type of award in PD². To create the **BOA**, select **Procurement** → **Pre-Award/Award** → **Award**, and select the award form from the **Award** menu.

A **Create New ...** window opens with a system generated PIIN in the **Number** field. Confirm that the number is correct in accordance with *DFARS 204.7003*.

Note: Refer to *DFARS 204.7003*, for elements of the number. Recall, the ninth position indicates the type of instrument. Certain awards always default to a “C” in the ninth position. Change the “C” to a “D” in the ninth position if it is an indefinite delivery contract.



The screenshot shows a dialog box titled "Create New SF26 Award". It has two text input fields: "Number" and "Description". The "Number" field contains the text "WJLW49 - 01 - G - 0001". The "Description" field contains the text "BOA". Below the fields are two buttons: "OK" and "Cancel".

Enter a description in the **Description** field, and click [OK].

The award form opens. Click through the tabs and populate all applicable blocks in the form.

Note: Create CLINs in the **Line Item Detail** window in the same manner that CLINs are created for IDIQ contracts. IDC constraints are not necessary. Be certain that sufficient dollar amounts are entered to cover all possible usage for CLINs without quantities (i.e.: one lot at \$500,000). To do this, enter the dollar amount of the CLIN in the **Max Quantity** field and enter a “1” in the **Unit Price** field. Refer to <http://kb.amsinc.com/ID/42041/> for an explanation of how to build IDIQ contracts in PD².

After all data has been entered in each of the tabs on this document, generate the CLINs by selecting **Document Options** → **Generate CLINs** from the menu bar. Select **Document Options** → **Generate Section J** to generate Section J if there are attachments associated with this contract. Refer to <http://kb.amsinc.com/ID/37748/> for additional

instruction in adding text to section J. Select **Document Options → Generate Document** to generate the final document.

Note: See pages 132-141 in the *Procurement Desktop-Defense User's Guide, Version 4.1* for an explanation of how to use the *Clauses* tab in PD² documents.

If changes have been made to the CLINs or the document, after the document has been generated, re-generate the CLINs and document. The changes will only be incorporated into the final *generated* document.

Save and close the document.

Approve and release the award. To approve the document, highlight the closed document icon and select the red approval checkmark in the toolbar. Select the appropriate approval template from the list of available templates and click **[OK]**. In the **Approval** window, select **Approved** from the drop-down list box.

Note: Always run the Pre-approval check before approving the document. To do this, click the **[Preapproval]** button in the **Approval Sheet** window.

Note: If more than one signature is required for this award, route the document to obtain the other signatures and approval stamps. To do this, highlight the document and select the mail slot icon on the toolbar. Then select the names of the applicable signers and route the document. See pages 48-53 in the *Procurement-Desktop Defense User's Guide, Version 4.1* for a more detailed explanation of how to create routes and approve documents in PD².

After the document has been approved, the document becomes read-only. To release the approved document, select **Procurement → Pre-Award/Award → Awards → Release Award**. This will release the document and make the document indelible. To update or change a released document, a modification must be created.

Note: Only users with a sufficient warrant may release documents. See page 173 in the *Procurement Desktop-Defense User's Manual, Version 4.1* for the list of validations that PD² runs before releasing a document. If any of these criteria are not met, the document will not release.

Note: If the **BOA** was created from an **External Award**, the **External Award** must only be approved, in order to create a **DO/TO**.

2.2 Creating the Purchase Request

Create a **PR** by selecting **Procurement** → **Requirements** → **PR Form**. Enter in the **PR** number and complete the form.

Note: Be certain to set up the CLINs as for IDIQ requirements. This will facilitate the CLIN matching process on the **DO/TO**.

Approve the **PR**.

2.3 Creating the Delivery Order

Create the **DO/TO** by highlighting the **BOA** document icon and selecting **Procurement** → **Post-Award** → **FSS Order/DO/TO (DD Form 1155)**.

Note: Select **Commercial FSS Order/DO/TO (SF 1449)** from the **Post-Award** menu, if the **DO/TO** is created from a **SF 1449 BOA**.

When the **Create New ...** window opens, verify the **PIIN**, and click **[OK]**.

2.3.1 The CLIN Matching Screen

The **Delivery/Task Order** window opens, with the **CLIN** information from the conformed copy of the contract (**BOA**) on the left side.

The screenshot shows the **Delivery/Task Order** window with the following details:

Contract: WJLW49-01-G-0001, BASIC ORDERING AGREEMENT (Award / Contract icon checked)

Delivery/Task Order: WJLW49-01-G-0001-0001, BOA Delivery/Task Order (DD 1155 icon)

Both sections include input fields for **Min Qty**, **Min \$ Amt**, **Max Qty**, and **Max \$ Amt**.

CLIN #	Description	Type
0001	CLIN 1	FFP

Remaining Quantity	Unit Cost	Remaining Cost
8,000	1.00	

Buttons at the bottom: **Report**, **OK**, **Cancel**, **Attach**.

Click the **[Attach]** button in the bottom right corner of the window to attach the **PR** to the **DO/TO**.

When the **Attachment Selection** window opens, enter the search criteria in the **Search Criteria** field for the **PR** that will be attached to the **DO/TO**. Click the **[Search]** button .



Highlight and select the appropriate **PR** and click the **[Select]** button.

When the **Delivery/Task Order** window opens, CLINs from the **PR** display on the right side of the window. Highlight the CLIN in each column to match them together. An “equals” sign displays between the matched CLINs.

Note: Refer to *Chapter 5: Post-Award Functions* in the *Procurement Desktop-Defense User's Guide, Version 4.1* for more information regarding the CLIN matching window and creation of a **DO/TO**.

CLIN #	Description	Type	Remaining Quantity	Unit Cost	Remaining Cost
0001	CLIN 1	FFP	8,000	1.00	

CLIN #	Description	Type	Quantity	Cost	CLIN Price
0001	CLIN 1	FFP	8000		8,000.00

After matching all CLINs for the **DO/TO**, click **[OK]**.

2.3.2 Completing the DO/TO

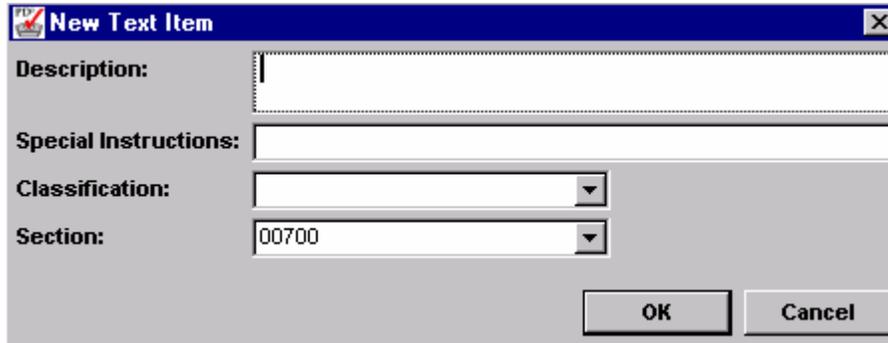
Complete all tabs on the **DO/TO**:

- Enter a date in the **Date of Order/Call** field
- Select the **Funds Available** checkbox

2.3.3 Adding a Statement of Work

To add a Statement of Work or any other applicable attachment, click the *Clauses* tab.

The **[Add Text]** button provides the functionality to enter text into the *Clauses* section. Click the **[Add Text]** button. When the **New Text Item** window opens enter a description of for the text that is being added into the **Description** field.



Enter any special instruction comments in the **Special Instructions** field. Next, select the classification of the document (**Statement of Work, Site Specific Terms and Procedures, Special Instructions Number, or Master Solicitation Procedures**) from the **Classification** drop-down list box. Then select the section in which this document should be placed, from the **Section** drop-down list box. Click **[OK]**. This information creates a placeholder in the *Clauses* tab under designated section.

Highlight the placeholder and click the **[Edit]** button. A Microsoft Word opens. Enter text into the Microsoft Word document and select **File → Close and Return** to save and exit. This adds the text to the *Clauses* tab, which will incorporate into the document after generating.

Note: See pages 132-141 in the *Procurement Desktop-Defense User's Guide, Version 4.1* for an explanation of how to use the *Clauses* tab in PD² documents.

2.3.4 Generation, Approval, and Release

After reviewing the tabs, generate the CLINs and the document. Select **Document Options → Generate CLINs** to generate the CLINs. After a message box opens informing the user that the CLINs have been built, select **Document Options → Generate Document**. Once the document is generated, save and close the **DO/TO**.

To approve and release the **DO/TO**, highlight the document and click on the red checkmark on the tool bar. Select the appropriate approval template, and approve the document. If more than one approval is needed to approve this document route the document by highlighting the document icon and clicking the route button on the tool bar (the mail slot). Designate the appropriate people to approve the **DO/TO**, and route it to them.

Once the **DO/TO** has been fully approved, release the document by selecting **Procurement → Pre-Award/Award → Awards → Release Award**.

Note: Notice that the **DO/TO** is released under the **Award** menu and not the **Post Award** menu. There is no option under the **Post-Award** menu to release a **DO/TO**.
