



Combining Purchase Requests and Creating Split Awards

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1. COMBINING PURCHASE REQUESTS

To incorporate more than one Purchase Request (**PR**) into a PD² document, open the document and click on the tab, which lists the line item summary information.

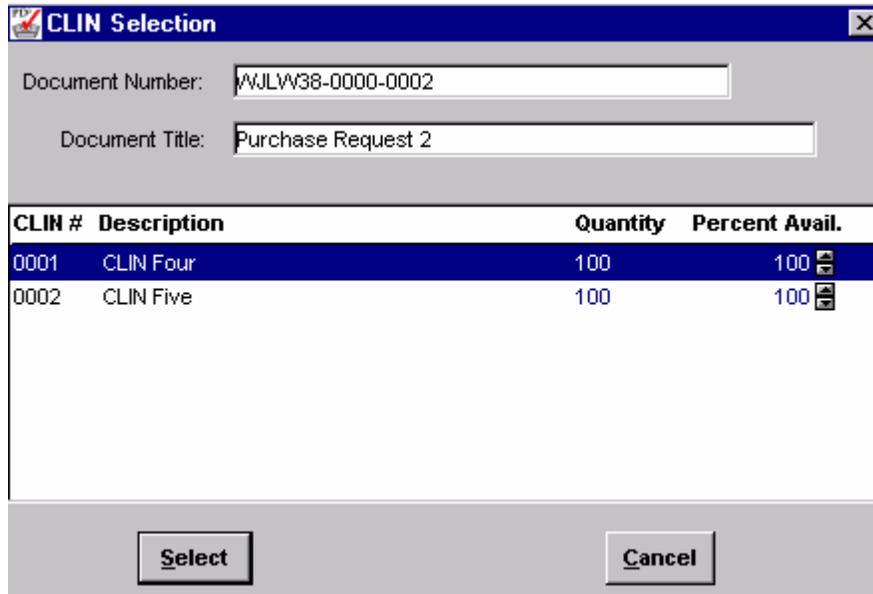
Note: If a **PR** was highlighted when the document was created, the **PR** line items will already display in **Line Item Detail** when the document is opened.

To attach additional line items, select **Line Item → Attach**. The **Attachment Selection** window opens. Select **Purchase Request** from the **Document Type** drop-down list box. Enter search criteria in the **Search Criteria** window. Enter a wildcard “%” symbol to search for all **PRs** in the database. Click the [**Search**] button. Highlight the **PR** in the **Search Results** window, and click the [**Select**] button.

Note: If the **PR** is not approved, it will not display in the **Search Results** window. If the **PR** has already been incorporated in a different document, the **PR** will also not display. Only those **PRs** that are approved and not fully incorporated, that meet the search criteria, display in the **Search Results** window.



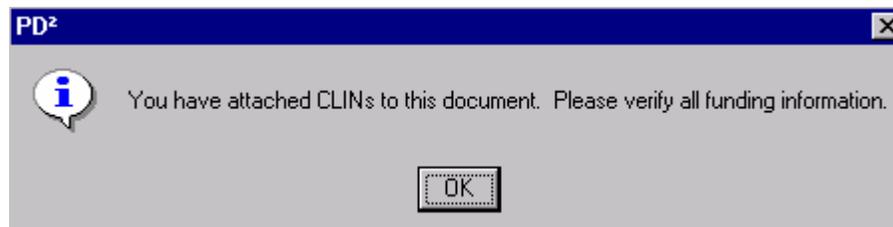
Highlight the **PR** and click the [**Select**] button. The **CLIN Selection** window opens, displaying all **CLINs** on the selected **PR**.



If the line items on the **PR** are partially incorporated into a different document, the percentage available will be less than 100. Highlight the CLINs to be attached to the solicitation or award. To partially incorporate the CLIN, click in the **Quantity** field and adjust the quantity to be incorporated. The percentage of the CLIN that is available will change when the quantity is changed. Highlight the CLIN(s) and click the **[Select]** button to incorporate the selected CLINs into the document.

Note: To select more than one CLIN in the **CLIN Selection** window at a time, press and hold the <Ctrl> key, then click the CLINs in the **CLIN Selection** window. When all CLINs to be incorporated display highlighted, click the **[Select]** button.

After clicking the **[Select]** button, a message box opens instructing the user to verify all funding information.



Click **[OK]**. The CLINs, selected in the **CLIN Selection** window, display in **Line Item Detail** for the quantity specified in the **CLIN Selection** window.

Note: Repeat these steps to add CLINs from a separate **PR**, by selecting **Line Items**→**Attach**.

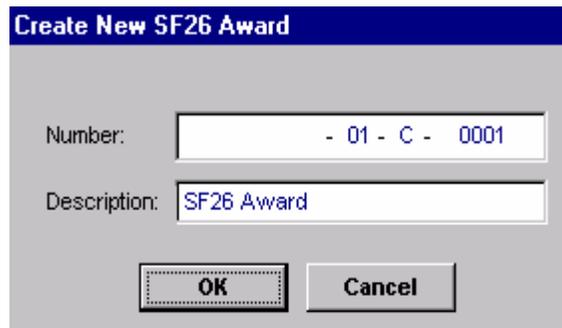
2. CREATING SPLIT AWARDS

Users may split a **PR** to create either a solicitation or award. Splitting the **PR** will allow the user to incorporate CLINs from one **PR** into multiple documents.

Note: The outlined procedure below is similar to the process for split awards.

2.1 Creating the First Solicitation or Award

Begin by highlighting the **PR** and select the appropriate solicitation or award form from the **Procurement** menu (**Procurement** → **Pre-Award/Award** → **Awards** → award type). The **Create New Award** window opens. If you will be creating a Delivery Order off this award, change the “C” to a “D” in the PIIN before clicking [**OK**]. The CLINs from that **PR** automatically populate the associated solicitation or award.

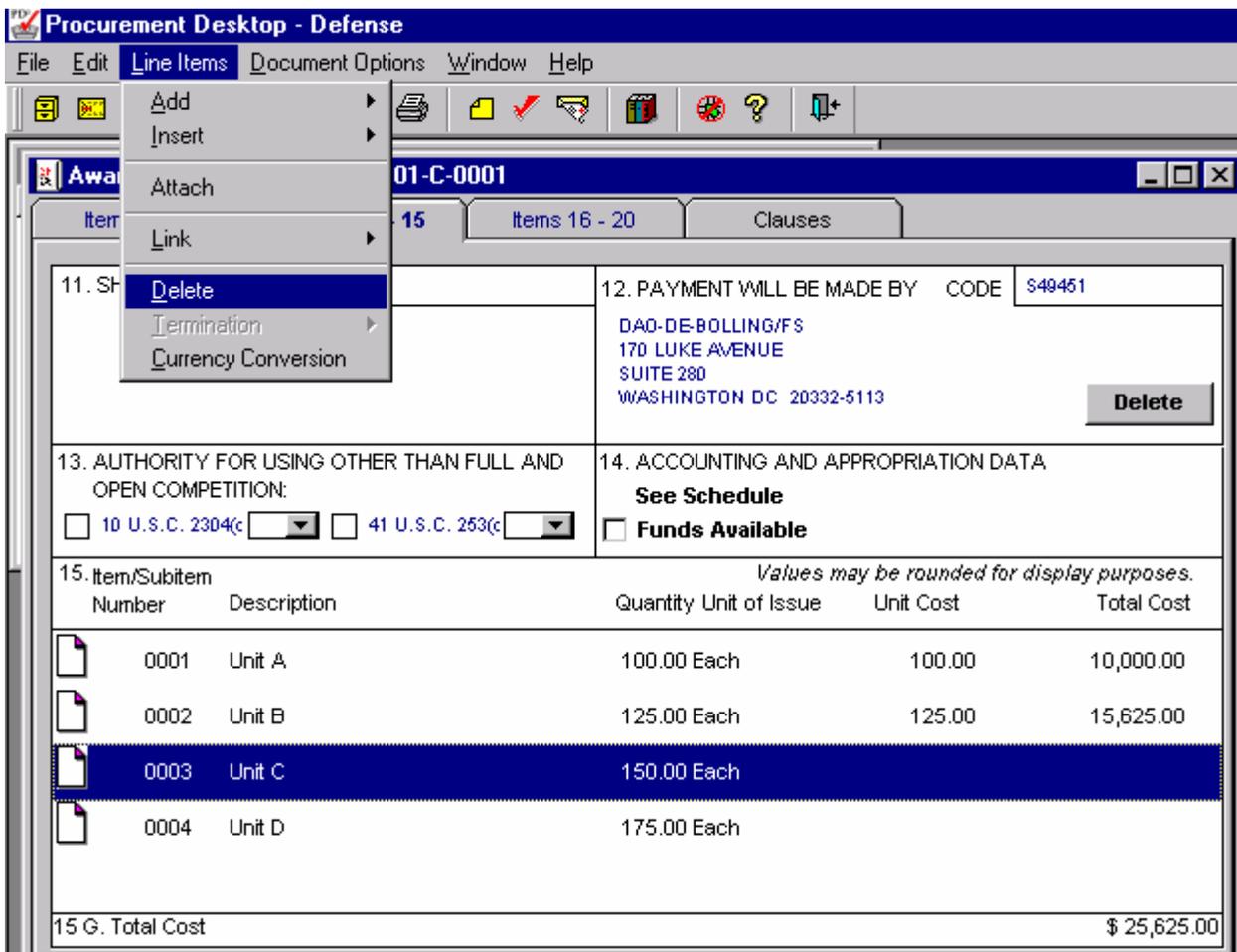


Open the solicitation or award and be sure to enter an **Effective Date**, **Contractor Name** and **Address**, and **Payment Office** in the **Payment will be Made By** field.

2.2 CLIN Structure for First Solicitation or Award

Enter **Unit Prices** for each CLIN that will be awarded to this Contractor. Delete CLINs that are not applicable to the solicitation or award, by highlighting them and clicking [**Delete**] on the *Detail* tab in the **Line Item Detail** window. To delete CLINs from the **Line Item** menu, highlight the CLIN to be deleted and select **Line Items** → **Delete**. When prompted with a message confirming that CLINs will be deleted, click [**OK**].

Note: To partially incorporate CLINs from the **PR**, open **Line Item Detail** and change the quantity on the *Detail* tab, to be less than the original quantity. The **Line Item Cost** field updates with the new cost of the adjusted line item. Click the *Funding* tab, highlight the line of accounting and click the [**Change**] button. In the **Funding Sources** window, enter the new funded amount in the **Amount** field, and click [**OK**].



Populate all applicable blocks on the solicitation or award form.

Note: Make sure to check the **Funds Available** box in the **Accounting and Appropriation Data** field.

Save the document.

2.3 Generation, Approval, and Release of the Award

- Generate the CLINs by selecting **Document Options** → **Generate CLINs**. If there are attachments to be associated with this document, you must also generate Section J by selecting **Document Options** → **Generate Section J**. Finally, you must generate a final version of the document. To do this, go to **Document Options** → **Generate Document**.

Save and close the document.

Note: If any changes are made to either the CLINs or the document after generation, you must re-generate those sections to incorporate the changes in the final document.

- To approve the document, you must highlight the award on your desktop and click on the red approval checkmark on your toolbar. Select the **Contract Award Approval** template from the list and approve the document.

Note: Always run the Pre-approval check before approving the document. To do this, click the [**Preapproval**] button on the top right-hand corner of the screen.

You will most likely need more than one signature on this award. You must route the document to obtain the other signatures and approval stamps. To do this, highlight the document on your desktop and select the mail slot icon on your toolbar. Then select the names of the applicable people and route the document.

- Once your document has been fully approved, select the menu option **Procurement → Pre-Award/Award → Award → Release Award** to release the document. You cannot edit a released document without creating a modification.

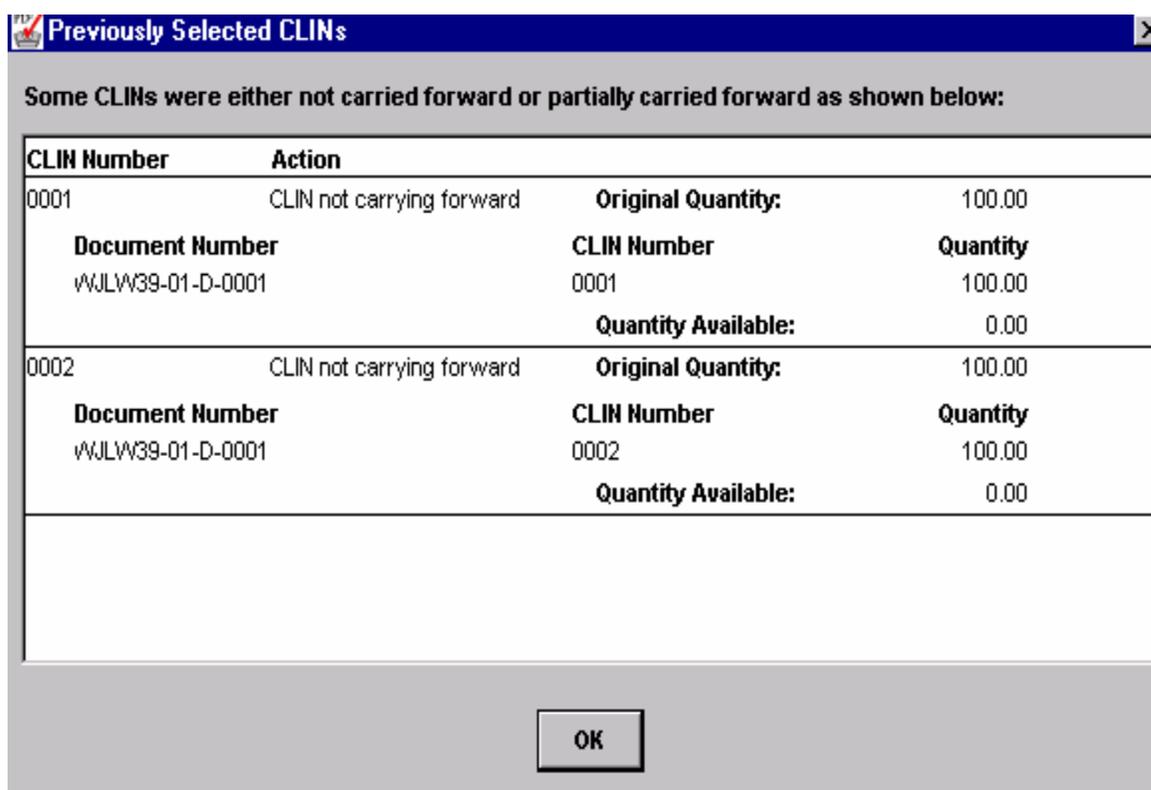
Note: Only users with a sufficient warrant may release documents.

2.4 Creating the Second Solicitation or Award

To award the remaining CLINs on the Solicitation or Award to another Contractor, create a second award. Highlight the original **PR** and select the appropriate solicitation or award form from the **Procurement** menu to create a new solicitation or award (**Procurement** → **Pre-Award/Award** → **Awards** → award type).

The **Create New ...** window opens prompting the user to enter the **PIIN** and a **Description**. Once done, click **[OK]**.

PD² will issue a message stating that several of the CLINs from the solicitation have already been awarded. The **Previously Selected CLINs** window opens displaying the remaining quantity from the CLINs which were selected in the solicitation or award created above. The window displays the original quantity of the CLIN on the **PR**, and the quantity incorporated into the solicitation or award.



Note: This message serves as a reminder that these CLINs are not accessible for this award since they have already been fully used.

When **[OK]** is clicked, the CLINs and the CLINs with quantity available, populate the new solicitation or award. Open the **Line Item Detail** window to view the line items added to the award or solicitation.

Again, the award will automatically populate with the information that was given in the solicitation. Check through every tab, and be sure to enter the following information:

- Effective Date
- Name and Address of the Contractor
- Payment will be Made By Block

Populate the remaining blocks on the solicitation or award form. Generate, approve and release it.