



How to Avoid

Cost Constraint Errors

How to Avoid Cost Constraint Errors in PD²

1.1 Upgrade to PD² v4.1e

Prior to release of PD² v.4.1c SR04, the validation logic in PD² incorrectly totaled the ordered amount on delivery orders when more than one PR CLIN was matched to any contract CLIN that had been matched in a previous delivery order.

See KB article 21558 (<http://kb.ams.com/ID/21558>), which explains how PD² calculates the ordered quantity on delivery orders prior to PD² v4.1c SR04, and the technical assistance the SPS Help Desk has provided clients to work around this issue when the “Max CLIN Constraint” message appears in error. PD² v4.1c SR04 corrected the validation logic so that the ordered quantity on all delivery orders is totaled correctly when more than one PR CLIN is matched to the same contract CLIN.

The SPS Help Desk recommends that you upgrade to PD² v.4.1e. If you experience a problem with the ordered quantity exceeding the clin maximum constraint in PD² v.4.1e, during pre-approval, contact the SPS Help Desk, after following the instructions below.

1.2 Print a Delivery Order Report before you create a new Delivery Order or Delivery Order Modification

There are two ways to create **Delivery Order Reports** in PD².

1. In the **DO/TO Matchmaker** window, click **[Report]**. The **Delivery Order Report** window displays a list of all CLINs on the conformed copy of the contract, and a list of all delivery orders in which that contract CLIN was used to create a delivery order CLIN. It lists the ordered quantity on all released, approved, and unapproved delivery orders.
2. The second method is to create a delivery order report is to select the conformed copy of the contract, and select **Procurement**→**Post Award**→**Award Status**. Click the **[Detail]** button in the “Task Order Count” block. The same **Delivery Order Report** window opens. To save this report select **File**→**Save**, **File**→**Close**. An **Award Status** icon is saved to the desktop. Create a new **Award Status** each time the base contract is modified, and delete the old **Award Status** icon.

1.3 Confirm that the constraint message is inaccurate before calling the Help Desk

If a message box displays informing the user that the CLIN quantity has exceeded the CLIN maximum constraint, for example: “Total (8,000,000.00) > Maximum quantity constraint (25.00). Revise the quantity to be less than or equal to the specified maximum constraint,” look in the Delivery Order Report window for the contract line item where the maximum line item constraint equals 25.00. Total the ordered quantities of all

“released” and “non-released” delivery orders and delivery order modifications in the bottom window.

If the total ordered quantity is the same as the total ordered quantity that displays in the message box, then the validation message was generated as the system was designed, to inform the user that the ordered quantity exceeds the maximum quantity available on the selected contract CLIN. In such a case, delete the delivery order and create a modification to the base contract to increase the maximum quantity before creating a new delivery order or delivery order modification.

If more than one contract CLIN has a maximum quantity of 25.00, you must add the total ordered quantities of all “released” and “non-released” delivery orders for each contract CLIN on the report, to identify which contract CLIN the validation error refers to.

If the total ordered quantity is incorrect (the total ordered quantity of all delivery orders and delivery order modifications, matched to the contract CLIN, with the maximum quantity constraint of 25, is not 8,000,000.00) then report this message to the SPS Help Desk. Create a print screen of the validation error and provide a faxed copy of the delivery order report to the SPS Help Desk when opening a new service request.

1.4 Avoid using the DO/TO Matchmaker Window on SF 30 Delivery Order Modifications in pre-PD² 4.1e versions.

This, of course, is not possible for many of our users, who attach **PRs** to create modifications to existing delivery orders in PD². There is a problem with the **Delivery Order/Task Order** window in the **SF 30** Delivery Order Modification in pre-PD² v4.1e versions. Open the **SF 30** and select **Line Items**→**DO/TO** match to view the **Delivery/Task Order** window on the **SF 30**. When the **SF 30** is created, the line item information from the conformed copy of the contract displays on the left side of the **Delivery/Task Order** window. The user must match line items in this window, then click **[OK]** and reopen this window to attach more line items.

The defect in pre-PD² v4.1e versions is that **Delivery/Task Order** window does not display the conformed CLIN information once the **SF 30** has been saved and closed. When the **SF 30** is saved and closed, and the CLIN information from the conformed copy of the contract at the time the original delivery order was created displays in the left side of the **Delivery/Task Order** window. The left side of the **Delivery/Task Order** window should always display the contract number and CLIN information from the conformed copy of the contract. This defect is corrected in PD² v4.1e. For users in pre-PD² v4.1e versions, it is advised CLINs be matched on the **SF 30** Delivery Order modification, before the document is saved and closed. If the **SF 30** has already been saved and closed, and the problem arises, delete the **SF 30** and recreate it, and be certain to match all CLINs before saving and closing the **SF 30**.