



Creating FPDS Reports

February 27, 2001

Table of Contents

1. CREATING THE DD FORM 350	1
1.1 COMPLETING THE DD350	1
1.2 VALIDATION.....	2
1.3 SIGNING AND DATING THE REPORT	4
2. CREATING THE DD1057 FEEDER SHEET.....	6
3. CREATING THE MONTHLY DD1057	7
3.1 COMPLETING THE DD1057	7
3.2 SEARCHING FOR MISSING FEEDER SHEETS	8
3.3 SEARCHING FOR INCLUDED FEEDER SHEETS	10
3.4 VALIDATION	10
3.5 SIGNING AND DATING THE REPORT	10

1. CREATING THE DD FORM 350

1.1 Completing the DD350

The **DD Form 350** is created off of an approved and released Large Purchase Award. To create the **DD Form 350**, highlight the award and select **Procurement** → **Pre-Award/Award** → **FPDS Reports** → **DD Form 350**. When the **Create New DD 350** window opens verify the PIIN of the award and the address of the Contracting office. Click [OK].

The screenshot shows a software window titled "Create New DD350". It features several input fields and a list box. The "Number" field contains "012001-01-D-0001". The "Description" field contains "DD350". Under "Report Type", the "Original" radio button is selected. The "Report Number" field contains "000001". The "Contracting Office" list box contains the following text: "CODE", "DAVID W. TAYLOR NAVAL SHIP RESEARCH AND", and "ANNAPOLIS, MD 21402". At the bottom right of the list box is a "Delete" button. At the bottom of the window are "OK" and "Cancel" buttons.

The **FPDS –Individual Contracting Action Report** window opens. For ease of use, the Desktop divides the form into four tabs:

- *Secs. A1-B12E* tab
- *Secs. B13-C9* tab
- *Secs. C10-D4E* tab
- *Secs. D5-F4* tab

Validation Rules Summary

Status

All
 Fail
 Warning
 Error
 Not Applicable

Short Rule	Status
Dun & Bradstreet Corp. Data Universal Numbering System (DUNS)	Pass
E3 must not = 96CE	Pass
E8 must not = 0(zero) or blank.	Pass
Enter complete address in line B5E unless B5A = 79023863	Pass
First two positions of E3 must not = 17, 21, 57, or 97	Pass
If B10 = N; B11 must be zero.	Not Applicable
If B10 = Y and B13A = 1 or 3 and B13D is blank; B11 must be	Not Applicable
If B10 = Y and B2 is blank; B11 must be greater than or	Not Applicable
If B11 greater than zero; B13A must = 1 or 3.	Not Applicable
If B12A = C111 thru C216, C219, T002, T004, T008, T009, T014	Not Applicable
If B12B = B20; positions 1 & 2 of B12A must be "89".	Not Applicable
If B12D = 23311, 23321, 23322, 23331, 23332, 23411, 23412,	Not Applicable
If B12D is one of the TICs of the SBCDP (325412,332993,3329	Not Applicable
If B13A = 1 and B2 is blank and B13D is blank; positions 7	Not Applicable
If B13A = 1, 3, 5, 6, 8 or 9 and B13D is blank; B7 must = 1.	Not Applicable

Total Number of Rules: 309

Highlight a rule. Click the **[View]** button to view the validation rule. The **FPDS Rule** window opens. Click the **[Close]** button to close the **FPDS Rule** window. Click the **[Print]** button to print the validation rules currently displayed in the **Validation Rules Summary** window.

By selecting **DD 350 Information**→**AutoValidation**→**Off**, the **DD Form 350** may be saved without addressing the failed validations. However, the system enforces correction of failed validations before a signature can be applied to the form. The automatic validation option must be turned off, in order to sign the form without complying with the validation edits.

Validation Rules Summary

Status

All
 Fail
 Warning
 Error
 Not Applicable

Short Rule	Status
If B2 is not blank; B10 must = N.	Fail
If B2 is not blank; B11 must be zero.	Fail
If B6B is a country code; B5B must = N	Fail
If C14 = N; B14 must = A, B or C.	Fail
Line A3A is a required field and must be entered.	Fail
Line B12D is a required field and must be entered.	Fail
Line B12D must be 5 digits and a blank or 6 digits	Fail
Line B1C must = Y or N.	Fail
Line B1D must = Y or N.	Fail
Line B5B is a required field and must be entered.	Fail
Line B6B is a required field and must be entered.	Fail
Line B6C must not be blank.	Fail
Valid codes for line B10: Y or N.	Fail
Valid codes for line B12A: Section I, DoD Procurement Codin	Fail
Valid codes for line B12B: A1A, A1B, A1C, A20, A30, A4A, A4	Fail

Total Number of Failed Rules: 20

Click the [Close] button to return to the **DD Form 350**.

Be sure to go back through the **DD Form 350** and check any failed checks until they have all passed the validation check.

1.3 Signing and Dating the Report

Click the [Add] button in the **Section F1** field, which displays the **Name of Contracting Officer or Representative**. Search for the Contracting Office address, and select it. The name of the Contracting Officer will display in **Section F1**, and their phone number will populate into **Section F3**.

Next, click [Sign] button next to **Section F2**. This will apply the associated signature to the report. PD² will validate the signature against the user's login, so that only the Contracting Officer will be able to sign the report. The date in **Section F4** populates automatically once the report has been signed.

The [Sign] button may be grayed out for one of two reasons:

- The **DD Form 350** has failed at least one validation check and the auto-validation feature is turned on.

- The name in **Section F1** belongs to a user id that is different than the user who is trying to sign the report.

Save and close the report.

Highlight the **DD Form 350** icon, and select **File→Approvals** to approve the **DD form 350**. Select the appropriate approval template and approve the report.

Once a **DD Form 350** has been signed and approved, follow these steps to flag the file for electronic transmission:

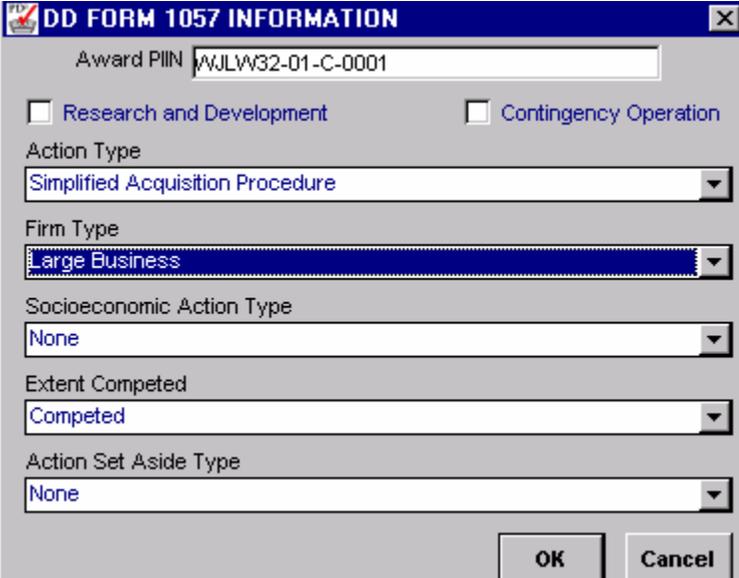
1. On the desktop, highlight the icon for the **DD Form 350** document to be transmitted.
2. From the **Procurement** menu, select **EDI Transmit**.

A lightning bolt displays on the **DD Form 350** icon to indicate that the file has been flagged and is ready for transmission by the System Administrator.

2. CREATING THE DD1057 FEEDER SHEET

The **DD1057** tracks certain information and obligations valued at less than \$25,000.00.

To create a **DD1057 Feeder Sheet**, highlight the award (either before or after it is released). Select **Procurement → DD 1057 Feeder Information**.



Note: The **DD Form 1057 Information** window opens. The **Award PIIN** field defaults to the number for the current simplified purchase award

Select an option from each of the following drop-down list boxes: **Action Type**, **Firm Type**, **Socio-Economic Action Type**, **Extent Completed**, and **Action Set Aside Type**.

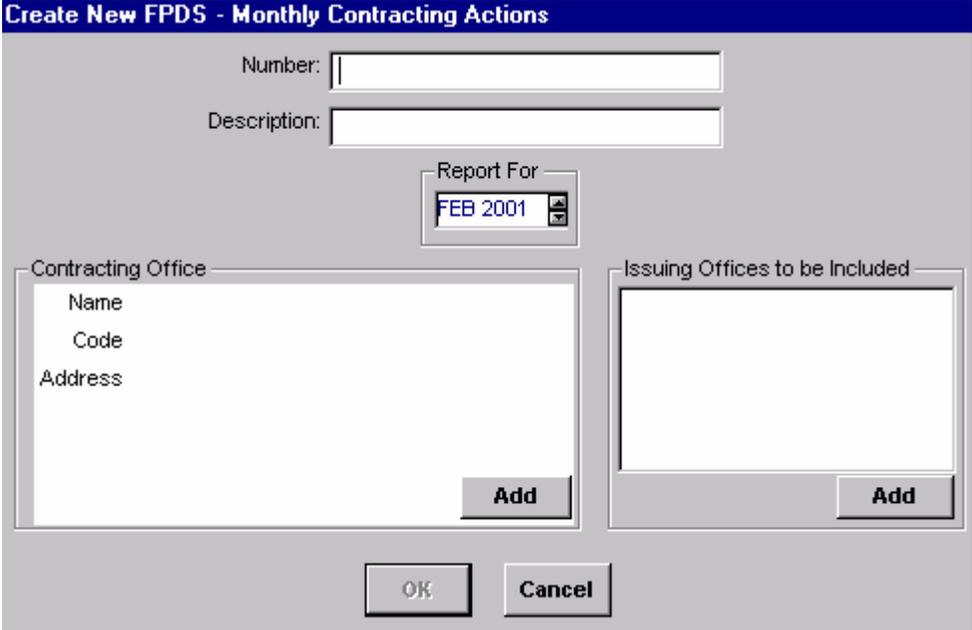
Select the **Research and Development** or **Contingency Operation** radio buttons, if applicable.

Click **[OK]** to save changes. After clicking **[OK]** to save, there will not be a **DD 1057 Feeder Sheet** icon saved to the desktop. The information will be saved in PD² until the time the monthly **DD 1057** is created. To access the **DD FORM 1057 INFORMATION** window, at any time, for this award, highlight the award, and select **Procurement→DD 1057 Feeder Information**.

3. CREATING THE MONTHLY DD1057

3.1 Completing the DD1057

When a **DD1057** for a particular month, a document is not highlighted. Select **Procurement → Pre-Award/Award → FPDS Reports → DD Form 1057**.



1. Enter in the document number and description in the **Number** and **Description** fields.
2. Select a month for the report using the **[Up]** and **[Down]** arrow buttons in the **Report For** field.
3. Click the **[Add]** button to open the **Address Search** window and select the Contracting Office to displays in the **Contracting Office** field.
4. Click the **[Add]** button in the **Issuing Office to be Included** field, to open the **Address Search** window, and select additional Contracting Offices to report on the **DD 1057**.
5. Click **[OK]** on the **Create New FPDS-Monthly Contracting Actions** window. **The FPDS-Monthly Contracting Actions** window opens.

FPDS - Monthly Contracting Actions - WJLW33

Sections A1-B4 Sections B5-B9 Sections C1-D7 Sections E1-E12 Sections F-H

MONTHLY SUMMARY OF CONTRACTING ACTIONS

Report Control Symbol DD-AT&L(M)1015

Section A - General Information

A1 Report for Month Ending 20010228

A2 Name of Contracting Office

A2a Name CARISLE BARRACKS

A2b Address ATTN: ATZE-DOC-C BUILDING 46 CARLISLE BARRACKS PA 17013-5002

A3 Contracting Office Codes

A3a Reporting Agency FIPS 95 Code

A3b Contracting Office Code

Section B - Contracting Actions

(1) Category	(2) Actions	(3) Dollars
B1 Tariff or Regulated Acquisitions	0	\$0
B2 Foreign or Interagency	0	\$0
B2a FMS or International Agreements	0	\$0
B2b Actions with UNICOR	0	\$0
B2c Actions with Other Government Agencies	0	\$0
B3 Small Business	1	\$10,000
B3a Simplified Acquisition Procedures	1	\$10,000
B3b GSA Schedule Orders	0	\$0
B3c Other Federal Schedule Orders	0	\$0
B3d All Other Orders	0	\$0
B3e Other Contracting Actions	0	\$0
B4 Large Business	1	\$20,000
B4a Simplified Acquisition Procedures	1	\$20,000
B4b GSA Schedule Orders	0	\$0
B4c Other Federal Schedule Orders	0	\$0
B4d All Other Orders	0	\$0
B4e Other Contracting Actions	0	\$0

Note: The monthly **DD 1057** will populate with information from the **DD 1057 Feeder Sheets** that have been created for individual awards.

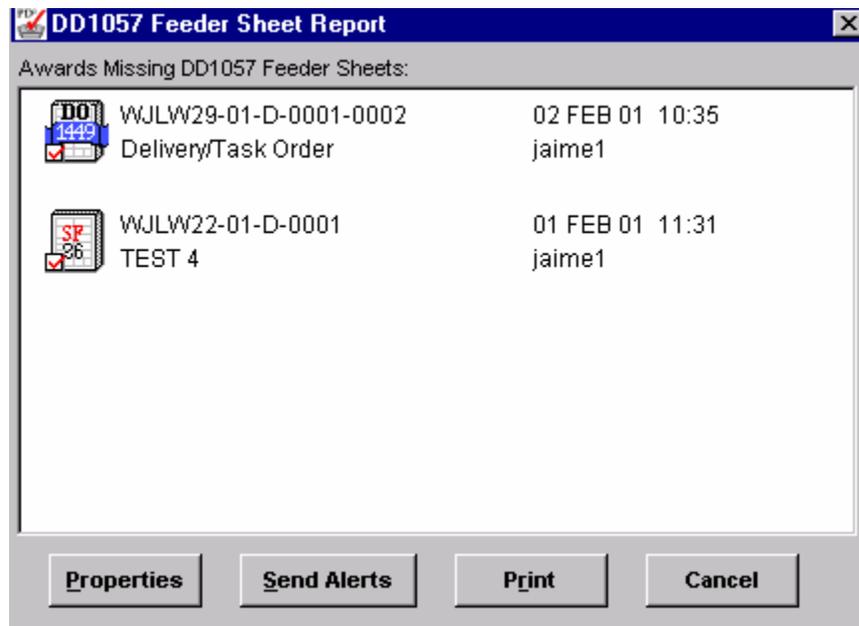
Enter the Reporting Agency FIPS 95 Code the **A3a** field.

Click through the tabs on the form to confirm that all required information is complete and accurate.

3.2 Searching for Missing Feeder Sheets

Select **DD 1057 Information** → **Reports** → **Missing 1057 Feeder Sheets** to view all actions that qualify to be reported on the **DD 1057**, which are missing feeder sheets.

To print a list of documents with missing feeder sheets, click the **[Print]** button. This report will print the document number, type of document, owner of the document, and the time stamp.



When the **DD 1057 Feeder Sheet Report** window opens, click the **[Properties]** window to view the location of the award. The **Properties** window displays the desktop where the document resides, as well as the date and time the user completed the action. Any workload assignment information on this document will also display in the **Properties** window.

To notify the user, who owns the award, to complete the **DD 1057 Feeder Sheet**, highlight the document icon in the **DD 1057 Feeder Sheet Report** window, and click the **[Send Alerts]** button. The text of the alert is automatically generated in PD². This message is editable and the document number must be entered into the text of the message. The alert is sent to the owner of the award with the missing feeder sheet. If the document is in a team cabinet, the alert will be sent everyone on that team. After the user creates the feeder sheet, the document icon will display in the **Incorporate** window.

Once the **DD 1057 Feeder Sheet** is created for the award, the award will not automatically incorporate into the **DD 1057**. Select **DD 1057 Information** → **Incorporate** to view all awards that contain a Feeder Sheet, which have not been incorporated into the **DD 1057**. Highlight the document icon and click the **[Incorporate]** button. Reopen the **DD 1057** to confirm that the award action has been incorporated in the appropriate blocks.

3.3 Searching for Included Feeder Sheets

For a list of all documents that have been incorporated into the **DD Form 1057** report, select **DD 1057 Information → Reports → Included Awards**.

3.4 Validation

To validate the completed fields on the **DD Form 1057**, select **Pre-Award/Award→FPDS Reports→DD Form 1057**. The **Validation Rules Summary** window opens. From the **DD 1057 Information** menu, select **Run Validation**. The **Validation Rules Summary** window opens. The window contains a short description of each rule, with the results of each rule (Pass, Fail, Warning, Error, Not Applicable).

Click the appropriate radio button from the **Status** radio button group to sort the list of rules. Highlight a rule. Click the **[View]** button to view the validation rule. The **FPDS Full Rule** window opens. Click the **[Close]** button. Click the **[Print]** button to print the validation rules currently displayed in the **Validation Rules Summary** window. Click the **[Close]** button to close the window.

The system default for auto validation is “on”, meaning the system automatically performs the validation edits prior to saving or signing the form. To turn the auto validation off, select **Auto Validation→Off**, from the **DD 1057 Information** window.

The system will save the **DD Form 1057** without addressing failed validations. However, the system enforces correction of failed validations before a signature can be applied to the form. The automatic validation option must be turned off in order to sign the form without complying with the validation edits.

3.5 Signing and Dating the Report

Click the **[Add]** button next to **Section H2a**, which displays the **Name of Contracting Officer**. Search for the correct Contact name and office to be associated with this document. The name of the Contracting Officer displays in **Section H2a**. The phone number populates the **Section H2c** field.

Next, click **[Sign]** in **Section H2b**. This will apply the associated signature to the report. PD² will validate the signature against the user’s login, so that only the user, logged in as the Contracting Officer, will be able to sign the report. The date in section **H2d** will populate automatically once the report has been signed.

If the **[Sign]** button is inactive (grayed-out):

- The **DD Form 1057** has failed at least one validation check and the auto-validation feature is turned on.
- The name in **Section H2a** belongs to a different user id than the user who is trying to sign the report

Save, close and approve the report.

Once the **DD Form 1057** has been approved, follow these steps to flag the file for electronic transmission:

1. Highlight the **DD Form 1057** document to be transmitted.
2. From the **Procurement** menu, select **EDI Transmit**.