



**How PD² Lists [Add Text] items, FAR, DFARS and
Local clauses in PD² v4.1e (UCF Format)**

1.1 What's changed from PD² v4.1c to v4.1e?

The functionality of how clauses are ordered in the *Clauses* tab, changed from PD² v4.1c to PD² v4.1e. This document will explain the logic used by PD² to order clauses in PD² v4.1e. The important difference to note, is that in PD² v4.1c users had more flexibility to order clauses (they could drag and drop clauses into the order in which they wanted them to be generated in the document).

In PD² v4.1e, all clauses are ordered for the user using the logic/rules outlined in the sections that follow. The user does not have the ability to drag and drop the clauses into an order different than the order in which the system puts the clauses after generation. The only way the user can manipulate the clause order in the *Clauses* tab is to change the description (Refer to *Section 1.4: Using the Description Field to order Add Text items*).

1.2 Upgrading PD² v4.1c documents

The order in which clauses are displayed in the *Clauses* tab on documents released in PD² v4.1c will automatically be updated to follow the rules of clause ordering in PD² v4.1e, after the upgrade. The user does not have the ability to drag and drop the clauses into a different order, so the user will not be able to correct the way the clauses display in PD² v4.1e to reflect the way they displayed in the document prior to the upgrade. Creating a modification or amendment and “dragging” and “dropping” the clauses into the order the user desires will not work in PD² v4.1e. The only method to update the order of clauses in a released document is to create an amendment or modification, delete the clauses, then re-add the clauses after changing the description of the clause (Refer to *Section 1.4: Using the Description field to order Add Text items*).

1.3 Defining terms commonly used in this document.

Clauses tab: The last tab in the PD² document (on-line). To access the *Clauses* tab, open the PD² document and select the *Clauses* tab.



[Add Text] items: For the purpose of explaining how PD² orders clauses in the *Clauses* tab and the printed document, we refer to **[Add Text]** items as those items which are created in the *Clauses* tab, by clicking **[Add Text]**. All items that created on the *Clauses* tab, using the **[Add Text]** button are **[Add Text]** items, regardless of the content of the item (local clause, provision, or otherwise).



FAR, DFARS and Local Clauses: Clauses added to the *Clauses* tab by clicking **[Add Clause]**. The content of these clauses must be added through the **Clauses Task** in **System Administration**.

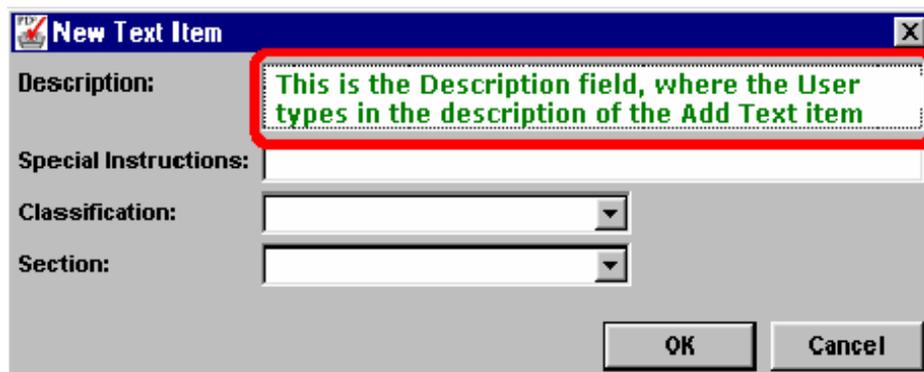


Local Clauses: Clauses added to the *Clauses* tab after clicking **[Add Clause]**. The text of these clauses must be added through the **Clauses Task** in **System Administration**. These clauses are not part of the Standard Data set, which includes all FAR and DFARS clauses, and display in the **Clauses Task** when PD² is initially installed.

All other items, which display in the *Clauses* tab (ie, CLIN information, Delivery, Inspection Information, Accounting and Appropriation Data), will not be discussed. These items always display at the top of each UCF Document section.

1.4 Using the Description field to order [Add Text] items

In the sections that follow we will discuss how **[Add Text]** items are ordered numerically then alphabetically, after the document is generated. By changing the text in the **Description** field, when text items are added to the *Clauses* tab, the user can manipulate the order in which the **[Add Text]** items display in the *Clauses* tab of a document. Click **[Add Text]** on the *Clauses* tab to view the **New Text Item** window. Enter the description of the **[Add Text]** item in the **Description** field in the **New Text Item** window.



The image shows a screenshot of a software dialog box titled "New Text Item". The dialog box has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains several fields: "Description:" with a text input field containing the text "This is the Description field, where the User types in the description of the Add Text item" (highlighted with a red border); "Special Instructions:" with a text input field; "Classification:" with a dropdown menu; and "Section:" with a dropdown menu. At the bottom right, there are two buttons: "OK" and "Cancel".

1.5 Selecting UCF Format

If you open a PD² document and select **Document Options>Classification**, the **Document Classification** window opens. To select a format type for the PD² document, select a format from the **Document Format** drop-down list box in the **Classification** window. When **UCF** is selected from the **Document Format** drop down list box, PD² will sort all **[Add Text]** items, FAR, DFARS and Local clauses in the *Clauses* tab in the order outlined in the sections that follow.

1.5.1 UCF Format: SECTIONS B to M, not including J

UCF: SECTIONS B to M, not including J – Clauses tab, after the document has been generated.
<p>All [Add Text], FAR, DFARS and Local clauses are ordered numerically, then alphabetically. For an example of how [Add Text], FAR, DFARS and Local clauses are ordered in the <i>Clauses</i> tab, after a document has been generated, but before the document has been closed, see Table 1. Numeric values are not listed “sequentially”. This means an [Add Text] clause with the description “10” will appear after an [Add Text] item with the description “1”, but before the [Add Text] clause with the description “2”.</p> <p>To work around this error, enter “0” in the Description field before numbers less than “10” if numbers have been entered in the Description field of the [Add Text] item, up to “99” in that section (ie, 01, 02...99). Enter “00” in the Description field before numbers less than “10” if numbers have been entered in the Description field of the [Add Text] item, up to “999” in that section (ie, 001, 002...999). Enter “000” in the Description field before numbers less than “10” if numbers have been entered in the Description field of the [Add Text] item, up to “9999” in that section (ie, 0001, 0002...9999).</p>

Table 1. Clauses (with the following descriptions) appear on the *Clauses* tab in the order outlined below, after the document has been generated, but *before* the document has been saved and closed.

Description	By Ref/Full Text	Clause Type
1	N/A	[Add Text] item
10	N/A	[Add Text] item
11.111-2	By Reference	Local
2	N/A	[Add Text] item
252.201-7000	By Reference	DFARS
252.203-7001	By Reference	DFARS
52.202-1	By Full Text	FAR
52.202-1 Alt 1	By Reference	FAR
52.203-2	By Reference	FAR
A	N/A	[Add Text] item
B	N/A	[Add Text] item

UCF: SECTIONS B to M, not including J – *Clauses* tab, after the document has been generated, saved, and closed.

Refer to Table 1 for an example of how **[Add Text]**, FAR, DFARS and Local clauses are displayed in the *Clauses* tab after a document is generated, but before the PD² document is saved and closed.

The order changes in the *Clauses* tab after the document has been generated, saved, closed and reopened. After you generate, save, close and reopen the document the **[Add Text]** items are listed before the FAR, DFARS and Local clauses.

Refer to Table 2 for an example of how **[Add Text]**, FAR, DFARS and Local clauses are displayed in the *Clauses* tab after the PD² document has been generated, saved, closed and reopened.

Table 2. **[Add Text]** items are displayed before FAR, DFARS and Local Clauses in the *Clauses* tab after the PD² document has been generated, saved, closed and reopened.

<u>Description</u>	<u>By Ref/Full Text</u>	<u>Clause Type</u>
1	N/A	<p style="text-align: center;">[Add Text]</p> <p>[Add text] items are listed numerically, then alphabetically. Numeric values are not listed sequentially.</p>
10	N/A	
2	N/A	
A	N/A	
B	N/A	
11.111-2	By Reference	<p style="text-align: center;">FAR, DFARS and Local</p> <p>FAR, DFARS and Local clauses (items added to the <i>Clauses</i> tab by clicking [Add Clause]) are listed sequentially, regardless of how they are incorporated (by Reference, or by Full Text).</p>
52.202-1	By Full Text	
52.202-1 Alt 1	By Reference	
52.203-2	By Reference	
252.201-7000	By Reference	
252.203-7001	By Reference	

UCF: SECTIONS B to M, not including J –Print Preview and View Document

To view the text of the generated Microsoft Word document:

1. Highlight the PD² document icon on your desktop and select **File>Print Preview**; or,
2. Open the PD² document and select **Document Options>View Document**. (When a generated document is viewed by selecting **View Document** from the menu bar, only the continuation pages will display).
3. If you are opening an **SF 30** modification or amendment by selecting **File>Print Preview** or **Document Options>View Document**, click on the **[Conformed Document]** button when the **Choose document type** window opens.

Refer to Table 3 for an example of how PD² orders clauses in the generated Microsoft Word document. In the printed document the order, in which **[Add Text]**, FAR, DFARS and Local clauses are displayed, changes.

- FAR, DFARS and Local clauses (added to the *Clauses* tab by clicking **[Add Clause]**), which are incorporated *By Reference*, display first. Clauses listed *By Reference* in the generated Microsoft Word document are listed sequentially in the order in which they are listed in the *Clauses* tab, after the document has been generated, saved and closed.
- The text of all **[Add Text]** items and FAR, DFARS and Local clauses, incorporated *By Full Text*, are listed after FAR, DFARS, and Local clauses incorporated *By Reference*. The text of all **[Add Text]** items is listed first. The text of all **[Add Text]** items is listed in the generated Microsoft Word document in the order in which the **[Add Text]** items display in the *Clauses* tab. The text of all FAR, DFARS and Local clauses is listed in the generated Microsoft Word document after the text of all **[Add Text]** items. The text of all FAR, DFARS and Local clauses, incorporated *By Full Text*, is listed in the same order in which the clauses display in the *Clauses* tab, after the PD² document has been generated, saved and closed.

Table 3. In the generated Microsoft Word document, **[Add Text]** items are listed before all FAR, DFARS and Local Clauses incorporated *By Full Text*. The **[Add Text]** items and the FAR, DFARS and Local Clauses are listed in the generated Microsoft Word document in the order in which they display in the *Clauses* tab, in the PD² document, after the document has been generated, saved and closed.

<u>Description</u>	<u>By Ref/Full Text</u>	<u>Clause Type</u>
11.111-2	By Reference FAR, DFARS and Local clauses (clauses added, by clicking [Add Clause]), incorporated by Reference are listed at the beginning of each section.	FAR, DFARS and Local FAR, DFARS and Local clauses (clauses added by clicking [Add Clause]) are listed sequentially, as displayed in the <i>Clauses</i> tab.
52.202-1 Alt 1		
52.203-2		
252.201-7000		
252.203-7001		
1	N/A The text of [Add Text] items are listed after all clauses by Reference.	Add Text The text of all [Add Text] items are listed in the continuation pages in the order in which the [Add Text] items appear in the <i>Clauses</i> tab.
10		
2		
A		
B		
52.202-1	By Full Text The text of all FAR, DFARS and Local clauses are listed after all [Add Text] items.	FAR, DFARS and Local The text of FAR, DFARS and local clauses, incorporated by Full Text, are listed in the continuation pages in the same order the clauses appear in the <i>Clauses</i> tab.

1.5.2 UCF Format: Section J

UCF: SECTION J – *Clauses* tab, before and after the PD² document has been generated, saved and closed.

All attachments that display in the *Clauses* tab, in Section J, are added to the *Clauses* tab by selecting the **[Add Text]** button. Refer to KB article #37748 (<http://kb.ams.com/ID/37748/>) for instruction on how to add attachments to section J in PD² v4.1e. Just as clauses in other sections of a UCF document, **[Add Text]** items, in Section J, are ordered numerically then alphabetically, after the PD² document and Section J has been generated. Numeric values are not listed “sequentially”. This means, an **[Add Text]** item in Section J, where “10” has been entered at the beginning of the **Description** field in the **New Item Text** window, will display after an **[Add Text]** item in Section J where “1” has been entered at the beginning of the **Description** field, and before an **[Add Text]** item in Section J where “2” has been entered in the **Description** field.

To work around this error, enter “0” in the **Description** field before numbers less than “10” if numbers have been entered in the **Description** field, of the **[Add Text]** item, up to “99” in that section (ie, 01, 02...99). Enter “00” in the **Description** field before numbers less than “10”, if numbers have been entered in the **Description** field of the **[Add Text]** item up to “999” in that section (ie, 001, 002...999). Enter “000” in the **Description** field before numbers less than “10” if numbers have been entered in the **Description** field, of the **[Add Text]** item, up to “9999” in that section (ie, 0001, 0002...9999). The “Table of Contents” clause is automatically generated when you select **Document Options**→**Generate Section J**. It is listed with the other **[Add Text]** items in alphabetical order.

The order of clauses in Section J does not change after the PD² document has been generated, saved and closed. The **[Add Text]** items in section J display in the generated PD² document in the same order before and after the PD² document has been saved and closed.

Refer to Table 4 for an illustration of how **[Add Text]** items in Section J display in the *Clauses* tab, after the PD² document and Section J have been generated, and the PD² document has been saved and closed.

Table 4. **[Add Text]** items, added to Section J, display in numeric, then alphabetical order in the *Clauses* tab of the generated PD² document. NB: The **Table of Contents** is an item in Section J, in the **Clauses** tab, which automatically displays in Section J, and is not added by the User.

<u>Description</u>	<u>By Ref/Full Text</u>	<u>Clause Type</u>
Attachment 1	N/A	[Add Text]
Section J Attachment	N/A	[Add Text]
Table of Contents	N/A	<Auto>
Test Attachment	N/A	[Add Text]

UCF: SECTION J – Print Preview and View Document

The text of all **[Add Text]** items in Section J display, in the generated Microsoft Word document, in the same order as they display in the *Clauses* tab in the PD² document. The one exception is the **Table of Contents**, which always displays at the top of Section J in the generated Microsoft Word document. Refer to Table 5 for an illustration of how the text of the **[Add Text]** items in Section J and the **Table of Contents** displays in the generated Microsoft Word.

Table 5. The text of all **[Add Text]** items in Section J display in the generated Microsoft Word document in the same order as they display in the *Clauses* tab in the PD² document. The one exception is the **Table of Contents**, which always displays at the top of Section J in the generated Microsoft Word document.

<u>Description</u>	<u>By Ref/Full Text</u>	<u>Clause Type</u>
Table of Contents	N/A	<auto>
Attachment 1	N/A	[Add Text]
Section J Attachment	N/A	[Add Text]
Test Attachment	N/A	[Add Text]