



Adding Text to Section J in PD² 4.1b, 4.1c, 4.1e

This document contains proprietary and confidential information related to the Procurement Desktop Defense (PD²) product of American Management Systems, Inc. (AMS), as defined in the Software License Agreement (SLA) between AMS and the Department of Defense (DoD), at Section J, Attachment #6, of Contract Number N68939-96-D-0010. This information includes, but is not limited to, icons and software screen prints. Distribution of this document is restricted to employees of the DoD or to third parties who require access on behalf of the DoD and who have executed an appropriate non-disclosure agreement as described in the SLA.

1. What are the differences...

In 4.1b and 4.1c, users had the option to add text to Section J, without creating a separate **Pd² Attachment**. In 4.1e, however, users must create a separate **Pd² Attachment**, in order to add text to Section J.



The "Pd² Attachment", as it is referred to in this document, is an object created on the user's desktop, that can be recognized by the icon that is created when the attachment is saved.

1.1 Creating a Pd² Attachment

In 4.1b, 4.1c, and 4.1e, when you highlight a PD² document, and select **Procurement**→**Attachment**→**New**, or **Utilities**→**Document Import**, a "PD² Attachment" is created.

To create the "PD² Attachment", follow the steps outlined below:

1. Highlight the document on your desktop, and select **Procurement**→**Attachment**→**New**. The [**Create Attachment**] window opens. Or, select **Utilities**→**Document Import**. The [**Import Attachment**] window opens. The only difference between the [**Create Attachment**] window and the [**Import Attachment**] window, is that *Template Type*, and *Template* blocks are not active in the [**Import Attachment**] window.
2. In the [**Import Attachment**] window, enter all relevant information into the *Source Document*, *Contact*, *Status*, *Action Pending*, *Expiration Date*, *Dollar Value limit*, *Description*, *Transmission Method* and *Classification* blocks. When you select **OK** in the [**Import Attachment**] window, The [**Pd² Select File**] window opens. Search for the file that you wish to insert, and select **Open**. Edit, save and exit the MS Word document. The "Attachment" icon (white sheet with blue paper clip) will display in the same container in which the document, to which it has been associated, has been saved.

--OR--

3. In the [**Create Attachment**] window, enter all relevant information into the *Source Document*, *Contact*, *Status*, *Action Pending*, *Expiration Date*, *Dollar Value limit*, *Description*, *Transmission Method* and *Classification* blocks. Select a template type from the *Template Type* drop-down list, and a template from the *Template* drop-down list. Select **OK**, and the template you selected will open. Edit, save and exit the MS Word document. The "Attachment" icon (white sheet with blue paper clip) will display in the same container in which the document, to which it has been associated, has been saved.

1.2 Creating the Section J Table of Contents

4. Open your procurement document (i.e. SF1442 solicitation). Go to the **Clauses** tab. **Select Document Options→Generate Section J**. The [Section J Table of Contents] window will open.
 - Document Type: You may select “Attachment” or “Exhibit” from the drop-down menu.
 - Doc #: You may edit the document number. Default values appear in order in which the attachments were created.
 - Document Description: Not editable.
 - Creation Date: Not editable.
 - Number of Pages: Editable. No default value.
 - Included: Select it, to mark with “X”, to include the item in the generated Section J table of contents.
5. Select **OK**. An item titled “**Table of Contents**” appears, under the heading **Section J** in the **Clauses** tab. Note: Generating Section J, and selecting the **Included** box, only identifies the description of the attachment to be included in the table of contents in Section J. Important: It does not include the actual text of the attachment, created in steps 2 and 3 above.

1.3 Adding the text of a PD² Attachment to Section J

6. Select **Add Text**. In the [New Text Item] window, enter **the Description, Special Instructions, Classification, and Section** (select Section J, if you would like the text of the attachment to appear in this section) as applicable. A new item (clause) will appear in the section that you selected from the **Section** drop-down window.
7. Highlight the new item (clause) and select **Edit**. A blank MS Word document will open. **Select Insert→File**. Search for the file that you inserted in steps 2 or 3 in the [Insert File] window. Note: The file that you inserted in steps 2 or 3 must be saved to a local directory. Save and Close.
8. Select **Document Options→Generate Document** to generate your document.

1.4 Identifying the difference between adding text to Section J in 4.1b, 4.1c and 4.1e

- In 4.1b and 4.1c, the user may skip steps 1-5, and add text to Section J, without building a Pd² “Attachment” or creating a Section J Table of Contents. In 4.1b and

4.1c, the user had the option to select **Add Text** and simply add text to Section J, by selecting **Edit** to open MS Word and insert the file (or copy/type text they wished to add).

- In 4.1e, if the user skips steps 1-5, the text that he adds to Section J, by selecting **Add Text** and **Edit** will disappear after document generation. If the user wants the actual text in Section J, using **Add Text** and **Edit**, he must create a Pd² “Attachment” (following steps 1-3 above), and a Section J table of Contents (following steps 4 and 5 above).