



SeaPort-e Enhancements

**Training Session Details
Version 1.1**

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1 System Overview

This section details the System Overview training session. The System Overview training session follows the structure outlined in the SeaPort II Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

1.1 History of SeaPort

The SeaPort e-procurement portal provides a secure automated procurement process that improves processing time, provides the ability to take advantage of numerous acquisition reform initiatives, including award term contracting, reverse auctioning, and electronic signatures, while still allowing Program Managers (PM) the ability to select solutions that meet their Professional Support Services (PSS) requirements. At the core of this portal is the fundamental concept that any PM can use the portal with minimal training in an intuitive "amazon.com"-like environment.

The private SeaPort e-marketplace provides end-to-end government to contractor support for the acquisition of PSS from the definition of requirements to contract closeout in a completely paperless and secure environment. The portal is web-based allowing requirements to be defined and proposals to be solicited, submitted, and evaluated from any location. Legally binding digital signatures, which have been defined by the electronic processes, are used to execute task orders. Modifications to task orders are generated in SeaPort by re-using the data captured from the current version of task orders, improving both the processing time and accuracy of modifications. Finally, solicitations, task orders and other contract documents are captured in an electronic resource library to provide models for future procurements. This move from segregated paper processes, to fully integrated electronic processes, dramatically reduces the time and cost associated with the acquisition of support services. PSS service acquisitions, which used to take months, now take days. To facilitate continuous improvement, the e-procurement portal captures data on each step of the process providing current performance metrics.

1.2 Procurement Process

SeaPort procurement consists of the following basic steps:

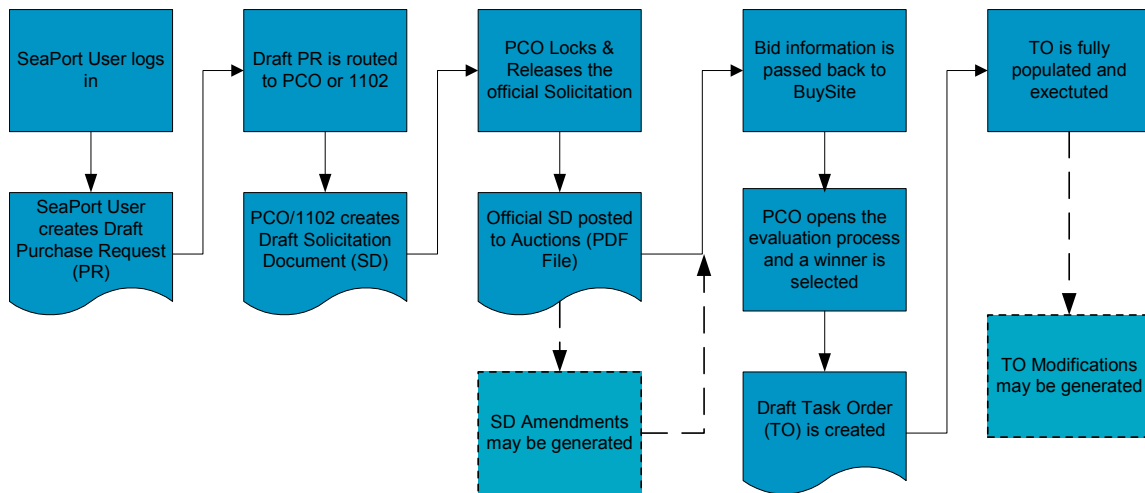
- Step 1 .** A SeaPort User creates a draft Purchase Request (PR) either by use of the New PR Wizard or by cloning an existing SeaPort document.
- Step 2 .** The draft PR is routed to a PCO or 1102.
- Step 3 .** Once the PCO/1102 is satisfied that the PR is complete, they create a draft Solicitation Document (SD).
- Step 4 .** Once the draft SD is fully populated and complete, a PCO Locks & Releases the official Solicitation, and posts the resulting PDF file to Auctions Services as a bidding event for MAC Contractors. If necessary, SD Amendments can be generated after the solicitation has been released.
- Step 5 .** When the bid event closes, all bid information is passed back to Buysite.
- Step 6 .** The PCO/1102 starts the evaluation process.
- Step 7 .** When the evaluation process is completed and a winner has been selected, the PCO creates a draft Task Order (TO).

Step 8 . Once the draft TO has been fully populated, completed, and the PCO is satisfied, the PCO executes the TO.

Step 9 . If necessary, TO Modifications can be generated after the TO has been executed.

Figure 1 below illustrates the procurement process.

Figure 1 - Procurement Process Diagram



1.2.1 SeaPort Benefits

Two-thirds of the cost in awarding a task order are in sourcing, drafting, and forwarding the requisition; obtaining approvals; and placing the order. Another third is incurred in generating payment, data reconciliation and integration, and contract closeout. Other process costs are incurred in monitoring contract performance for the life of the task order.

SeaPort reduces these general and administrative expenses through process automation, supplier consolidation, services aggregation, and standardized negotiation—consistent with federal and defense acquisition laws and regulations.

1.3 Access to the system

Access to SeaPort requires a user login. The SeaPort User administrator can create user accounts that will allow access to the system.

1.3.1 Get a SeaPort Account

To get a SeaPort account, follow these procedures:

- Step 1 .** Go to the SeaPort home page at <http://www.seaport.navy.mil/index.html>
- Step 2 .** Click on the Buy tab.
- Step 3 .** Click on the *Register Now* button.

- Step 4 .** Complete the on-line registration form.
- Pay particular attention that your registration information is accurate and complete. This is especially true of your e-mail address and your defined role. Avoid the use of rank or other designations in the Name field. The Name field is used to generate the Login that you will use to log into SeaPort. The use of rank or other titles will make the Login longer, more complicated, and harder to remember.
- Step 5 .** Click the *Submit* button. This will submit your request to the SeaPort User Administrator for review and approval. Each field activity will have a local User Administrator. You will receive e-mail notification after the SeaPort User Administrator has either approved or rejected your request.
- Step 6 .** Within 24 hours you will receive a response from the SeaPort User Administrator. If you have not received a response after 24 hours, contact navseasupport@aquilent.com for assistance.

1.3.2 Access the System

To access SeaPort, follow these steps:

- Step 1 .** Access the SeaPort Web site at URL: <http://www.seaport.navy.mil/>
- Step 2 .** Click on the Buy tab.
- Step 3 .** Click on the Access Portal link in the header navigation. This will take you to the SeaPort eProcurement Login page.
- Step 4 .** Log in to the SeaPort eProcurement portal.



The screenshot shows the SeaPort Login page. The page has a blue header with a sun icon on the left and a 'help' link and 'SeaPort' logo on the right. The main content area is titled 'BuySite' and contains a login form with fields for 'Login' and 'Password', a 'Go' button, and a link for 'Don't have a login ID? Register online.'. To the right of the login form is a section titled 'HOST NEWS'. On the left side of the page, there is a vertical navigation menu with four items: 'Create', 'Approve', 'Status', and 'Receive', each with a globe icon.

Figure 2: SeaPort Login

1.4 Navigation within the system

Once you have logged into the system, you will see the user home page. From this page, you can access the Document Library, or the Workflow page, as well as the header navigation.

1.4.1 Control Types

The following control types are used throughout the SeaPort interface. These types of controls should be familiar to anyone who has used a World Wide Web browser in the past.

- Radio
- Check Boxes
- Links
- Dropdown
- Buttons
- VCR Controls
- Text Box
- Icons

1.4.2 Header Navigation

The Header navigation is consistent throughout SeaPort. It contains the following navigational elements.

Table 1: Header Navigation

Navigational Element	Description
Home	Takes the user to the Welcome page.
Help	Opens a context-sensitive Help window.
Log Off	Logs the user out of SeaPort and displays the login page.
New Purchase Request	Starts the Purchase Request Wizard.
Document Library	Displays the Document Library (The Helm). The Document Library lists packages in the system.
Task Order	NOT ACTIVE
Reports	Displays the SeaPort Reports page. The SeaPort Reports page allows the user to choose a report from a list of all SeaPort reports. Note: Not all users have access to the same reports.
System Administration	Displays the System Admin page. The System Admin page allows the user to choose from a list of SeaPort administrative functions.
My Profile	Displays the User Profile page. The User Profile page allows the user to change user information that is stored in SeaPort.

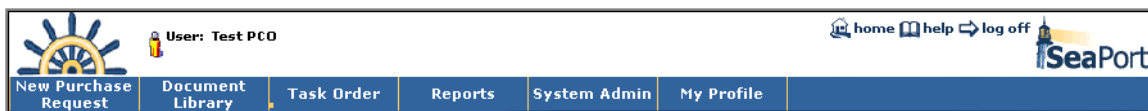


Figure 3: Header Navigation

1.4.3 Left Navigation

The left navigation is dynamic and will change as you progress through the procurement process. Below is an example of how the left navigation changes as the package status changes from Draft Purchase Request to Executed Task Order.

Table 2: Left Navigation: Package Home

Navigational Element	Description
Package Home	Takes the user to the package home page shown in Figure 35: Package Home.
History	Displays the Date, Event, Notes, and Agent of the package. The History page is displayed in Figure 6.
1102 Files	Files that may be important or are related to the package may be stored here. This area is restricted to only 1102 users; therefore it may be advantageous to place certain files here instead of attaching them to a PR, SD, or TO. The 1102 Files page is displayed in Figure 7.
Package Admin	Allows changes to the package's Short Description, Surcharge Rate, and Organization. The Package Admin page is displayed in Figure 8.

Table 3: Left Navigation: Purchase Request

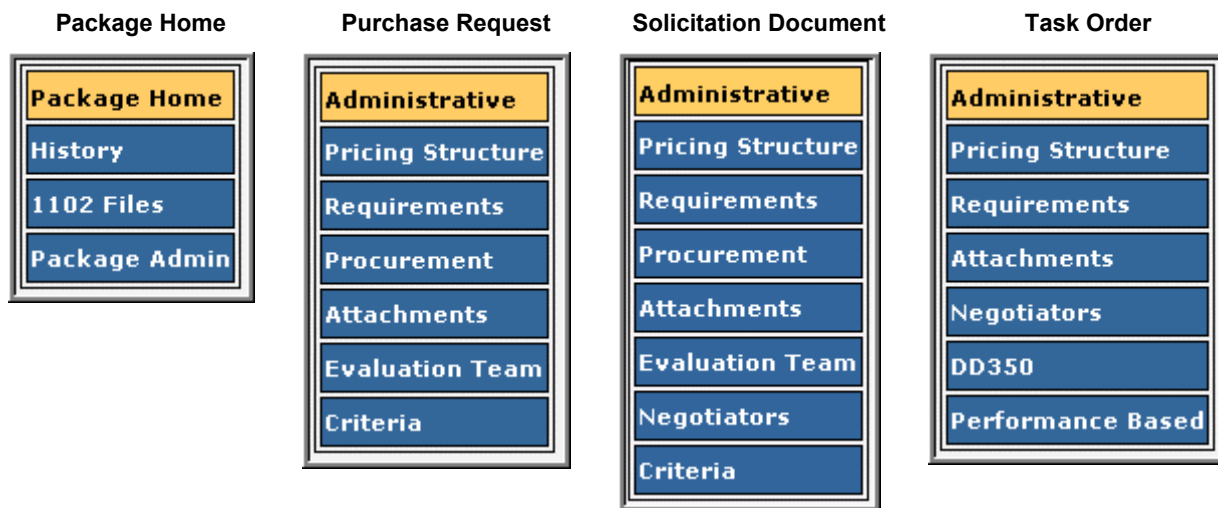
Navigational Element	Description
Administrative	Accesses the PR Administrative information as shown in Figure 37.
Pricing Structure	Accesses the PR Pricing Structure information as shown in Figure 38.
Requirements	Accesses the PR Requirements information as shown in Figure 49.
Procurement	Accesses the PR Procurement information as shown in Figure 51.
Attachments	Accesses the PR Attachments information as shown in Figure 53.
Evaluation Team	Accesses the PR Evaluation Team information as shown in Figure 55.
Criteria	Accesses the PR Criteria information as shown in Figure 57.

Table 4: Left Navigation: Solicitation Document

Navigational Element	Description
Administrative	Accesses the SD Administrative information as shown in Figure 59.
Pricing Structure	Accesses the SD Pricing Structure information as shown in Figure 60.
Requirements	Accesses the SD Requirements information as shown in Figure 66.
Procurement	Accesses the SD Procurement information as shown in Figure 67.
Attachments	Accesses the SD Attachments information as shown in Figure 68.
Evaluation Team	Accesses the SD Evaluation Team information as shown in Figure 70.
Negotiators	Accesses the SD Negotiators information as shown in Figure 71.
Criteria	Accesses the SD Criteria information as shown in Figure 72.

Table 5: Left Navigation: Task Order

Navigational Element	Description
Administrative	Accesses the TO Administrative information as shown in Figure 116.
Pricing Structure	Accesses the TO Pricing Structure information as shown in Figure 117.
Requirements	Accesses the TO Requirements information as shown in Figure 124.
Attachments	Accesses the TO Attachments information as shown in Figure 126.
Negotiators	Accesses the TO Negotiators information as shown in Figure 128.
DD350	Accesses the TO DD350 information as shown in Figure 129.
Performance Based	Accesses the TO Performance Based information as shown in Figure 130.

**Figure 4: Left Navigation**

A package can be selected from the SeaPort Document Library or from the Workflow pages. The Package's left navigation panels are shown in the following images; this includes the Package Home, History, 1102 Files and Package Admin pages. The Package Home page is displayed in Figure 5 below.

User: Test PCO

home help log off

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm | Package | Purchase Req. | Small Business

Package Home | History | 1102 Files | Package Admin

Route | Suspend Package

Package	PR N00024-04-NR-00176	Status	PR Draft
Organization	NAVSEA 02	TOM	GroundsKeeper Willie
Current Mailbox	Test PCO	Originator	Test PCO
Total Potential Value	250,000	Current Potential Value	
Total Value		Funded Value	
Suspended	No	Archived	No

Package Documents

Document	Ob-ID	Actions
PR N00024-04-NR-00176	653	

Figure 5: Package Home

The SeaPort system provides 1102 and PCO users the package admin panel for viewing the Package Action History and the Timeline. This information is read-only. The History page is displayed in Figure 6 below.

User: Test PCO

home help log off

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm | Package | Purchase Req. | Small Business

Package Home | History | 1102 Files | Package Admin

Route

Package Action History

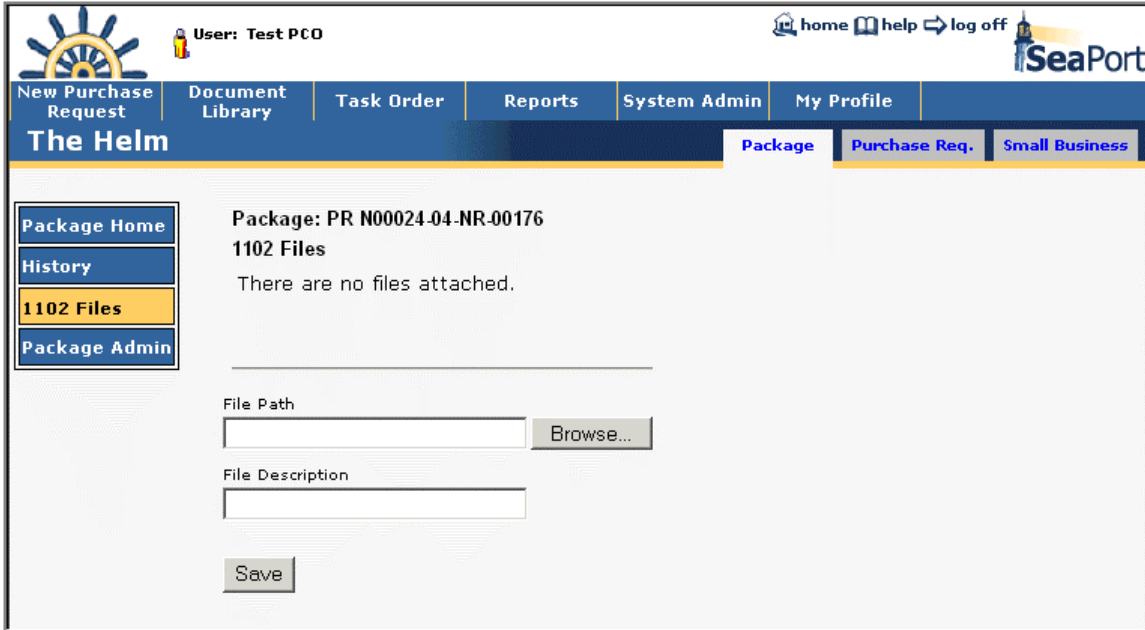
Date	Event	Notes	Agent
3/23/2004 11:11:39 AM	PR Created	N00024-04-NR-00176	Test PCO

Timeline

Status	ObID	Start	End	BizDays	Running Total
PR Draft		3/23/2004 11:11:39 AM	Ongoing	1	1

Figure 6: Package History

The SeaPort system provides 1102 and PCO users a file storage area that is independent of the general files attachment area. The 1102 Files area is not available or visible by any other user. The 1102 Files Area is accessed from the Package tab as shown in Figure 7 below.

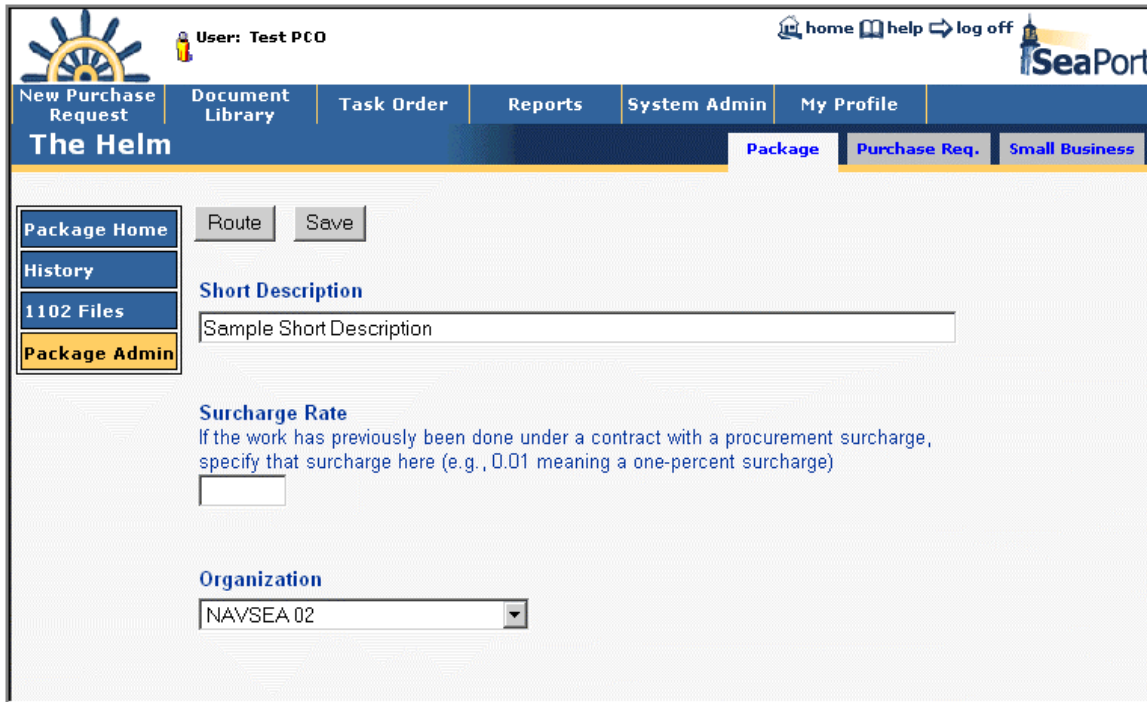


The screenshot shows the SeaPort system interface. At the top, there is a navigation bar with links for "New Purchase Request", "Document Library", "Task Order", "Reports", "System Admin", and "My Profile". The user is logged in as "User: Test PCO". The "SeaPort" logo is visible in the top right corner. Below the navigation bar, there is a "The Helm" section with tabs for "Package", "Purchase Req.", and "Small Business". The "Package" tab is selected, showing the "Package: PR N00024.04-NR-00176" and "1102 Files" section. The "1102 Files" section indicates "There are no files attached." Below this, there is a "File Path" input field with a "Browse..." button, a "File Description" input field, and a "Save" button. A sidebar on the left contains links for "Package Home", "History", "1102 Files", and "Package Admin".

Figure 7: Package 1102 Files

The SeaPort system provides 1102 and PCO users the package admin panel for updating the Short Description of Work and, if applicable, the surcharge rate for saving calculation purposes. The Package Admin Panel is accessed from the Package tab as shown in Figure 8 below. Both the Short Description and Surcharge Rate fields can be edited by the user. Once any changes are complete the user simply needs to press the Save button.

The *Route* button is provided to allow the user to forward the package to another system user for review.



User: Test PCO

home help log off

SeaPort

New Purchase Request Document Library Task Order Reports System Admin My Profile

The Helm Package Purchase Req. Small Business

Package Home History 1102 Files Package Admin

Route Save

Short Description

Sample Short Description

Surcharge Rate
If the work has previously been done under a contract with a procurement surcharge, specify that surcharge here (e.g., 0.01 meaning a one-percent surcharge)

Organization
NAVSEA 02

Figure 8: Package Admin

1.5 Using the Document Library

The document library contains packages. A package is a collection of related procurement documents. The contents of a package are added to over the procurement lifecycle of that package, and will contain a purchase request, solicitation documents (and amendments), and task orders (and modifications).

The screenshot shows the 'The Helm' interface for the Document Library. At the top, there are navigation tabs: 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The user is logged in as 'Test PCO'. Below the navigation is a search area with various filters: 'View: In my mailbox', 'Contractor', 'CLIN', 'Funds', 'Status', 'Keyword', 'Document No.', 'Event', 'on/after', 'on/before', 'Practice PRs', and 'Activity/Organization'. There are 'Details', 'Go', and 'Show All' buttons. Below the search area, it says 'Search criteria: In my mailbox. Practice PRs included.' and 'Displaying: 1 - 30 / 45'. A table of document packages is displayed with columns for Package, Package Status, Activity/Organization, MAC, Originator, and Suspended. The table contains 30 rows of data, including entries like 'PR N00024-04-NR-00045', 'SD N00024-04-R-7037', etc. At the bottom, it repeats the search criteria and display count.

Figure 9: Document Library

By default all packages in the user's mailbox are listed. The user's mailbox contains all packages that have been created by that user but not yet routed to anyone in addition to any packages that have been routed to that user by another user. This list may be filtered in various ways by using the fields at the top of the page. Select your filter criteria and click the Go button to apply the filter to the list. Click the *Show All* button to remove the filter and have all items listed.

This is a close-up of the search filters section from Figure 9. It shows the 'View' dropdown set to 'In my mailbox', and various input fields for 'Contractor', 'CLIN', 'Funds', 'Status', 'Keyword', 'Document No.', 'Event', 'on/after', 'on/before', and 'Practice PRs'. There are also 'Details', 'Go', and 'Show All' buttons at the bottom of the filter area.

Figure 10: Document Library Filters

Packages in the list can be sorted by any column in the header. Use the up arrow to sort in ascending order or the down arrow to sort in descending order.

The standard column headers are displayed in Figure 11 below. They include Package, Package Name, Activity/Organization, MAC, Originator, and Suspended.



Package	Package Status	Activity / Organization	MAC	Originator	Suspended
---------	----------------	-------------------------	-----	------------	-----------

Figure 11: Document Library - Standard Column Header

Selecting the Details checkbox will display additional package information in the list.

The detailed column headers are displayed in Figure 12 below. They include Package, Package Status, Activity/Organization, Solicitation, MAC, Originator, Value, Options Expire, PRCR, SDCR, SDLR, AUCL, TOCR, TOEX, Complete, TOCL, and Suspended.



Package	Package Status	Activity / Organization	Solicitation	MAC	Originator	Value	Options Expire	PRCR	SDCR	SDLR	AUCL	TOCR	TOEX	Complete	TOCL	Suspended
---------	----------------	-------------------------	--------------	-----	------------	-------	----------------	------	------	------	------	------	------	----------	------	-----------

Figure 12: Document Library - Detailed Column Header

Available filters are listed in Table 6 below.

Table 6: Document Library Filters

Field	Type	Description
View	Dropdown	Choose from: In my mailbox, I originated, I need to evaluate, I evaluated, I manage, Ever in my inbox, or Options Expiring.
Contractor	Dropdown	Choose a Contractor from the dropdown list.
CLIN	Dropdown	Choose from: Cost Type, FFP, or Cost Only.
Funds	Dropdown	Choose from: FMS, OPN, O&MN-N, O&MN-R, PANMC, RDT&E, SCN, WPN, OTHER, TBD, MDA, NDSF, or PMC.
Status	Dropdown	Choose from: PR Draft, Solicitation Draft, Solicitation Released, Bid Evaluation, Solicitation Amendment Draft, Task Order Draft, Task Order Executed, Task Order Executed, with Mod in Draft, Task Order Complete, or Task Order Closed.

Field	Type	Description
Keyword	Text Box	<p>Put in a word (or a more ambitious search expression) to seek in paragraph-or-longer fields of the Purchase Request, Solicitation Document and Task Order.</p> <p>Here are examples of things you can search for.</p> <ul style="list-style-type: none"> ■ warfare ■ "undersea warfare" - Enclose phrases in double-quotes. ■ surface and undersea - Finds PRs where both words appear in the same field ■ surface and not undersea ■ surface or undersea ■ surface near undersea ■ (surface and undersea) or warfare - Use parentheses to group terms ■ "war*" - Finds "warfare", "warship", "warhead" ■ FORMSOF(INFLECTIONAL, rescind) - Finds "rescinded", "rescinding", "rescission" <p>The system updates its full-text index daily. The full-text index will not reflect changes made to documents. The system updates its full-text index overnight.</p>
Document No.	Text Box	<p>The following formats are acceptable (In the examples below, "A" represents any letter, "0", "1", and "2" represent any numbers):</p> <p>PR: A00000-00-AA-00000</p> <p>SD: A00000-00-A-0000 1111 (where 1111 is an optional amendment number)</p> <p>TO: A00000-00-A-0000-111122 (where A00000-00-A-0000 is a MAC number, 1111 is a TO number, 22 is an optional mod number)</p> <p>If the exact number is unknown, the partial search can be performed using "%" before or after the known part. For example, search for "%111122" will return all the Task Orders with the number ending with 111122.</p>

Field	Type	Description
Event	Dropdown	This searches the history. At what point in the document's lifecycle does this state occur? Choose from: PR Created, Solicitation Created, Solicitation Released, Auction Closed, Task Order Created, Task Order Executed, Task Order Closed, Task Order Mod Created, or Task Order Mod Executed. The Event filter is related to the Date On/After and On/Before filters.
On/After	Text Box	The Date On/After and On/Before filters are related to the Event filter. Enter a date range. Either type in a date or use the calendar icons to select a date. The format MM/DD/YYYY needs to be used for date entries. You may specify a date range or a fiscal year, but not both.
On/Before	Text Box	
Practice PRs	Dropdown	Choose from: Only, Included, or Excluded.
Activity/Organization	Dropdown	Choose an Activity or Organization from the dropdown list.
Details	Check Box	<p>Choose to show the Document Library with or without Details. The Details filter provides timeline details.</p> <p>Without Details the following fields are displayed:</p> <ul style="list-style-type: none"> ■ Package ■ Package Status ■ Activity/Organization ■ MAC ■ Originator ■ Suspended <p>With Details the following fields are displayed:</p> <ul style="list-style-type: none"> ■ Package ■ Package Status ■ Activity/Organization ■ Solicitation ■ MAC ■ Originator ■ Value ■ Options Expire ■ PRCR ■ SDCR ■ SDLR ■ AUCL ■ TOCR ■ TOEX ■ Complete ■ TOCL ■ Suspended

1.6 Workflow Page

The workflow page is also used to access packages. Packages are presented based on their state in the procurement workflow. Packages will be sorted by Active Documents and Things to Do. The Workflow Page does not contain filters. Packages where you are the Originator are listed here. The user can also access customer surveys from this page. Some additional context is shown on the Workflow page. Some action items are placed here because of activity within the system. Figure 13 below illustrates a Workflow Page.

Home

Welcome, Test PCO!

Active Documents

Items in my mailbox:

Package	Package Status	Activity / Organization	In Mail Box	MAC
SD N00024-04-R-7134	Task Order Draft	NAVSEA--NAVSEA 02	Test PCO	
TO N00024-01-D-1112-0012	Task Order Executed	NAVSEA--NAVSEA 01	Test PCO	Acme
SD N00024-04-R-7130	Task Order Draft	NAVSEA--NAVSEA 02	Test PCO	
SD N00024-01-R-7088	Solicitation Released	NAVSEA--NAVSEA 00	Test PCO	
TO N00024-01-D-7017-0006	Task Order Complete	NAVSEA--NAVSEA 00	Test PCO	Ida
TO N00024-01-D-7022-0001	Task Order Complete	NAVSEA--NAVSEA 00	Test PCO	Osceola
TO N00024-01-D-7011-0003	Task Order Executed, with Mod in Draft	NAVSEA--PEO Submarine	Test PCO	Boone

Items I need to evaluate:

Package	Package Status	Activity / Organization	In Mail Box	MAC
SD N00024-04-R-7075	Bid Evaluation	NAVSEA--NAVSEA 02	Test PCO	

Items with Options Expiring:

Package	Package Status	Activity / Organization	In Mail Box	MAC
TO N00024-01-D-7010-0003	Task Order Executed, with Mod in Draft	NAVSEA--NAVSEA 00	Test PCO	Appanoose
TO N00024-01-D-7012-0003	Task Order Executed, with Mod in Draft	NAVSEA--PEO Submarine	Test PCO	Carroll

Customer Satisfaction Survey:

Package	Package Status	Activity / Organization	In Mail Box	MAC
TO N00024-01-D-1112-0012	Task Order Executed	NAVSEA--NAVSEA 01	Test PCO	Acme

Things To Do

Program Office Reviews:

	Package	Event Date	Actions
<input type="checkbox"/>	SD N00024-02-R-7047	7/13/2002 7:23:01 PM	
<input type="checkbox"/>	SD N00024-02-R-7051	8/13/2002 2:12:03 PM	
<input type="checkbox"/>	TO N00024-01-D-1112-0012	3/9/2004 2:34:27 PM	
<input type="checkbox"/>	SD N00024-04-R-7134	3/12/2004 4:46:18 PM	

Dismiss Checked Items

Figure 13: Workflow Page

1.7 Roles and Permissions

Roles and Permissions define the privileges a user will have when using the SeaPort application. Roles are requested by a SeaPort user and granted by a SeaPort User Administrator.

1.7.1 User

Users can register with SeaPort by selecting the Register link on the SeaPort home page. The user will enter identifying information and request a SeaPort role. Upon completion of the registration page, the SeaPort User Administrator will be notified. As soon as the user's registration request is approved, the user will be notified via e-mail. The registration page contains the fields shown in Table 7.

Table 7: Registration Page Fields

Field	Type	Description
Name	Text Box	Enter your full name using the format: First M. Last.
Activity	Dropdown	Choose an activity from the list.
Organization	Dropdown	Choose an Organization from the list or leave blank for field activities.
Location	Text Box	Enter your Location.
Telephone	Text Box	Enter your telephone number using the format: nnn-xxx-xxxx.
Extension	Text Box	Enter your telephone extension, if applicable.
Fax	Text Box	Enter your FAX number using the format: nnn-xxx-xxxx.
Email	Text Box	Enter your email address using the format: yourname@x.navy.mil.
Code	Text Box	Enter your Code.
Address	Text Box	Enter your street address.
City	Text Box	Enter the name of your city.
State	Text Box	Enter the 2-digit abbreviation for your state (DC, MD, VA, TX, etc.).
ZIP	Text Box	Enter your ZIP Code.
Roles		
Originator	Check Box	<p>Check this box if you need to create, review, or edit Purchase Requests or you need to evaluate proposals. The PR Originator begins the actual process and inputs most of the data found in the PR.</p> <p>Originators can be anyone who is authorized by the program manager.</p> <p>Originators have the authority to:</p> <ul style="list-style-type: none"> ■ Initiate a new PR ■ Initiate a modification ■ Send a PR to SEA 02 ■ Forward a document to a reviewing official ■ Update a PR ■ Delete a PR
BFM	Check Box	<p>The Business Financial Manager (BFM) is the only role that has the authority to update and enter financial accounting data into SeaPort.</p> <p>Additionally, the BFM can forward PRs to SEA 02 and can update a working Task Order.</p> <p>Check this box if you have the program authority to sign Financial sheets.</p>

Field	Type	Description
TOM	Check Box	<p>Task Order Managers are comparable to Contracting Officer's Representatives (COR) and/or Contracting Officer's Technical Representatives (COTR). If your COR/COTR training is current, you can request TOM privileges.</p> <p>The Task Order Manager acts as a procurement official through the preparation and definition of statement of work requirements and the evaluation of vendor proposals.</p> <p>The TOM role is similar to the current day Contracting Officer's Representative in that the TOM provides front line, day-to-day monitoring of the TO during execution.</p> <p>Essential to the TOM role is the maintenance of official files, including correspondence and past performance.</p> <p>The TOM is the only role that is able to create entries in the Task Order Evaluation.</p>
Lawyer	Check Box	Check this box if you have NAVSEA authority to perform legal reviews.
PCO	Check Box	<p>Check this box if you are a warranted NAVSEA contracting officer with authority to execute SeaPort task orders.</p> <p>The Procuring Contracting Officer is warranted and appointed by the Head of the Contracting Agency.</p> <p>The PCO is the only role that is able to issue a solicitation and award a Task Order.</p>
1102	Check Box	Check this box if you work in the Contracts organization.
SEA01	Check Box	<p>Check this box if you have authority to perform 1301 and 1517 reviews. Also check the FinancialReviewer and/or FinancialApprover checkboxes, and choose your SEA01 Division from the dropdown list.</p> <p>SEA 01 has a funding certification role in SeaPort acquisitions.</p> <p>SEA 01 has access to all sections of the PR and solicitation document and is the only role that is able to certify that funds have been Section 1301 and 1517 reviewed.</p> <p>Additionally, SEA 01 is the only role able to commit and post obligations.</p>
Financial Reviewer	Check Box	Check this box if you contribute to use-of-funds reviews. Choose a SEA01 Division from the dropdown list.
Financial Approver	Check Box	Check this box if you sign off on use-of-funds reviews. Choose a SEA01 Division from the dropdown list.
SEA01 Division	Dropdown	This list is used in conjunction with the Financial Reviewer and Financial Approver roles.
TOSI Reviewer	Check Box	Check this box if you are responsible for Task Order Savings Indicators.
TOSI Editor	Check Box	Check this box if you review Task Order Savings Indicators.
Deputy for Small Business	Check Box	Check this box if you perform Small Business Review.

1.7.2 Administrator

The following chart should aid in determining which roles a user should be assigned. PLEASE USE EXTREME CAUTION WHEN ASSIGNING ROLES AS THEY CONTROL SUCH ACTIONS AS EXECUTING TASK ORDERS, AMENDING TASK ORDERS, AND THE LIKE. Please refer to the Function/Privilege Matrix for additional information concerning the privileges assigned to each role.

Table 8: Function/Privilege Matrix

Role	Originator	BFM	SEA02	PCO	SEA01	MAC	TOM	LEGAL	BuySite Special Requisition
Originator	X								
PCO	X		X	X					X
BFM		X							
SEA01					X				
SEA02	X		X						X
MAC						X			
TOM							X		
LEGAL								X	

The intent of the above table is to illustrate the minimum role associations that need to be assigned when creating a user in BuySite. Using the PCO role as an example, any user identified as a PCO must be granted roles of PCO, Originator, and SEA02.

This list is not all-inclusive. The actual role associations should be as defined in the individual NAVSEA User Registration profiles. For example, a BFM will not normally be assigned any other role, unless specifically defined in the user profile.

For assigning roles from the SeaPort User Account Request Form use the table below:

Table 9: SeaPort User Account Request Form Questions

Question	Role
Can you originate Task Orders?	Originator
Are you a Task Order Manager?	TOM
Are you a Business Financial Manager?	BFM

NOTE: Some roles can be determined by looking at the users NavSea code.

The Roles and Permissions Matrix shown in Figure 14 below indicates functions that can be performed by various SeaPort roles.

Function	Sysadmin	Originator	TOM	1102	SEA01	PCO	User Admin	NEGOTR	TOSI (R)	TOSI (E)	EC	CM	LEGAL	MAC (subs)	MAC	FAD (R)	FAD (A)
General																	
Initiate a new PR	X	X		X		X											
Initiate an Amendment to a Solicitation	X			X		X											
Initiate a TO Modification	X	X				X											
Forward a document to a new reviewer	X	X	X	X	X	X											
Send PR to SEA02	X	X															
Define SEA01 2-Touch Reviewers																	
Perform 2-Touch Review					X												
Lock & Release SD						X											
Select the Evaluation Chairman		X		X		X		S									
Select the Evaluation Committee		X		X		X		S			X						
Select Negotiators						X											
Execute a TO/Select AD Winner						X											
Perform an Award Determination						X		RO			X	X	RO				
Use the Documents Library	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X
Read Access to Savings Panel				X					X	X						X	X
Write Access to Savings Panel										X							
Perf Based Panel Access		S	X	X		X											
1102 Files Panel Access						X		S									
Run Status Report	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X
Run Task Order Report	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X
Run TimeStamp Report	X	X	X	X	X	X	X	X	X	X	X	X	X			X	X
Run Procurement Summary Report				X		X											
Run TOPE Report				X		X							X				
Run IRD Report				X		X							X				
Run Option Expiration Report				X		X							X				
Run TOSI Report				X		X							X				
Run TOPE Scoring Summary Report				X		X											
Read/Write Access to DD350 Panel						X											
Suspend/Unsuspend a Package						X											

Function	Sysadmin	Originator	TOM	1102	SEA01	PCO	User Admin	NEGOTR	TOSI (R)	TOSI (E)	EC	CM	LEGAL	MAC (subs)	MAC	FAD (R)	FAD (A)
Create																	
Create Final PDF SD	X					X											
Create Practice PR	X	X		X		X											
Convert Practice PR to Real PR	X	X		X		X											
Create Final PDF TO	X					X											
Create entries on AD Summary Eval/Rating						X					X						
Create entries on AD Detailed Eval/Rating												X					
Create a new AD Round						X											
Create entries on FAD/2-Touch Tab					X	X											
Create Working TO				X													
Create entries on the IRD			X			X								X	X		
Create entries on Task Order Eval			X														
Create Digital Signature on Proposal														X	X		
Create an On-Line Cost Proposal						X									X		
Create Digital Signature on a TO						X	X										
Create user accounts	X																
Create an Auctions Bid Event	X			X													
Review																	
Review a PR																	
Review a Printable PR																	
Review a working SD	X	X		X		X							X				
Review a PDF SD	X	X		X	X	X							X				
Review an SD Mod	X	X		X		X							X				
Review FAD/2-Touch Tab	X	X			X	X							X				
Review an AD Summary Eval/Rating						X		X			X		X				
Review an AD Detailed Eval/Rating						X		X			X	X	X				
Review a working TO	X	X		X	X								X				
Review a PDF TO	X	X		X	X								X				
Review a TO Mod	X	X		X	X								X				
Review an IRD entry			X			X								X	X		

Function	Sysadmin	Originator	TOM	1102	SEA01	PCO	User Admin	NEGOTR	TOSI (R)	TOSI (E)	EC	CM	LEGAL	MAC (subs)	MAC	FAD (R)	FAD (A)
Review an TOPE entry			X			X					X	X	X	X	X		
Review user account info	X						X										
Review an Auctions Bid Event				X													
Update																	
Update a PR	X	X		X													
Update a working SD	X			X													
Update a FAD/2-Touch Tab	X				X	X											
Update a working TO	X			X													
Update an AD Summary Eval/Rating						X					X						
Update an AD Detailed Eval/Rating												X					
Update entries on the IRD			X											X	X		
Update entries on Task Order Eval			X											X	X		
Update user account info	X						X										
Update an Auctions Bid Event	X					X											
Delete																	
Delete a PR	X	X		X		X											
Disable a user account	X						X										

Figure 14: Roles & Permissions Matrix

Legend

TOM = Task Order Manager

BFM = Business Financial Manager

SEA02 = SeaPort Contract Office

PCO = Procuring Contracting Officer

EC = Evaluation Chairman

CM = Evaluation Committee Member

Legal = SeaPort Attorney

MAC = MAC Contractor

RO = Read Only

2 Purchase Request

This section details the Purchase Request training session. The Purchase Request training session follows the structure outlined in the SeaPort Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

2.1 Explain

The instructor will explain the purpose of a Purchase Request and how a Purchase Request is used within SeaPort.

2.1.1 Explanation

A Purchase Request is the beginning of the procurement process. Information entered in the Purchase Request is the basis for the information that will populate the Solicitation Document. The purpose of the Purchase Request screens is to gather the information about a Purchase Request. Use the left navigation buttons to access all the related Purchase Request screens (Administrative, Pricing Structure, Requirements, Procurement, Attachments, Evaluation Team, and Criteria).

NOTE: All times should be entered using local military time.

2.2 Demonstrate

The instructor will demonstrate the steps necessary to create a Purchase Request using the test system. The screenshots and explanations included in this section are for reference and to assure that all functional areas related to Purchase Requests are adequately covered.

2.2.1 Create Purchase Request using Wizard

The purpose of the Wizard screens is to ask initial questions about the Purchase Request being created. This will help facilitate entering the main data on the Purchase Request screens that follow.

The Purchase Request Wizard is the most common way of creating a Purchase Request. The goal of the Wizard is to obtain essential information quickly and easily to assist in processing the acquisition.

Information obtained using the PR Wizard interview format will be transferred to the Purchase Request panels in SeaPort. Any information entered using the PR Wizard may be edited later from within SeaPort.

The PR Wizard workflow is illustrated in Figure 15 below.

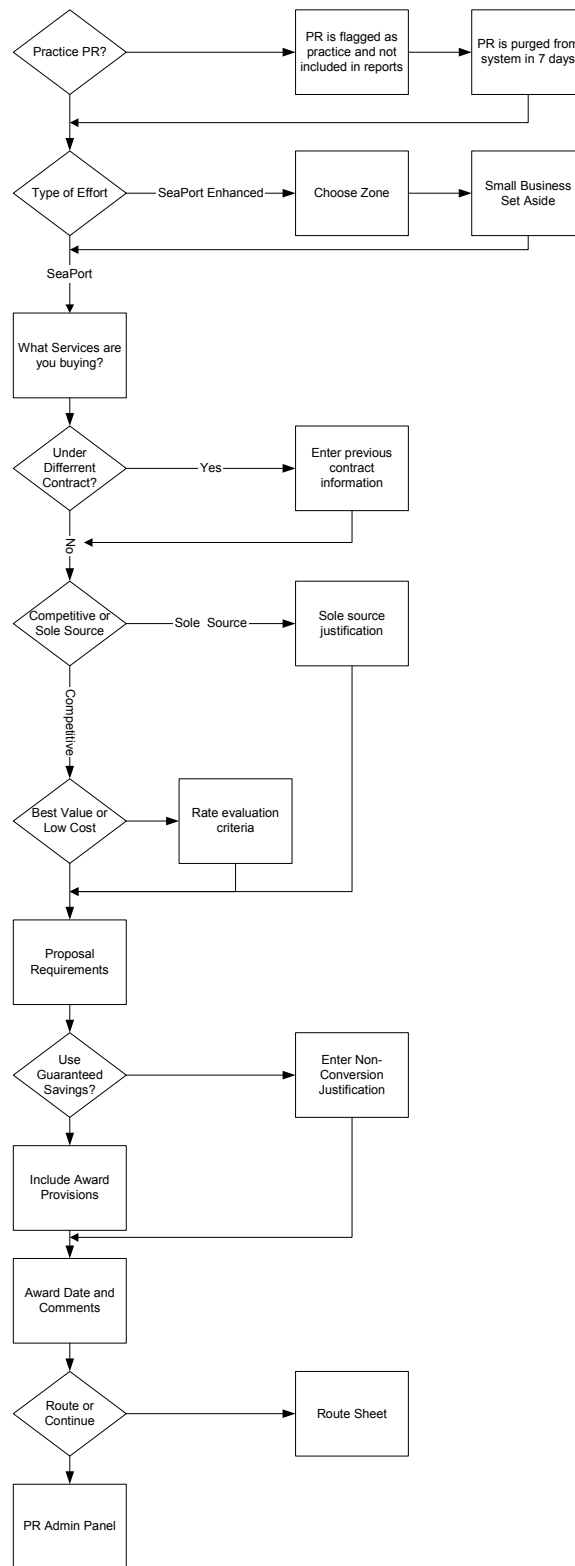


Figure 15: PR Wizard Workflow

Selecting the New Purchase Request link in the Header navigation starts the PR Wizard.



Figure 16: Header Navigation

The first page of the Purchase Request Wizard asks the user if this will be a practice PR. Practice PRs are not included in system metrics and are purged from the system in 7 days. Practice PRs are useful for new users to explore the system without the fear of doing damage. Should you wish to retain any of the information entered in a practice PR, the PR can be cloned before it is deleted from the system and that information will be placed into a real PR.

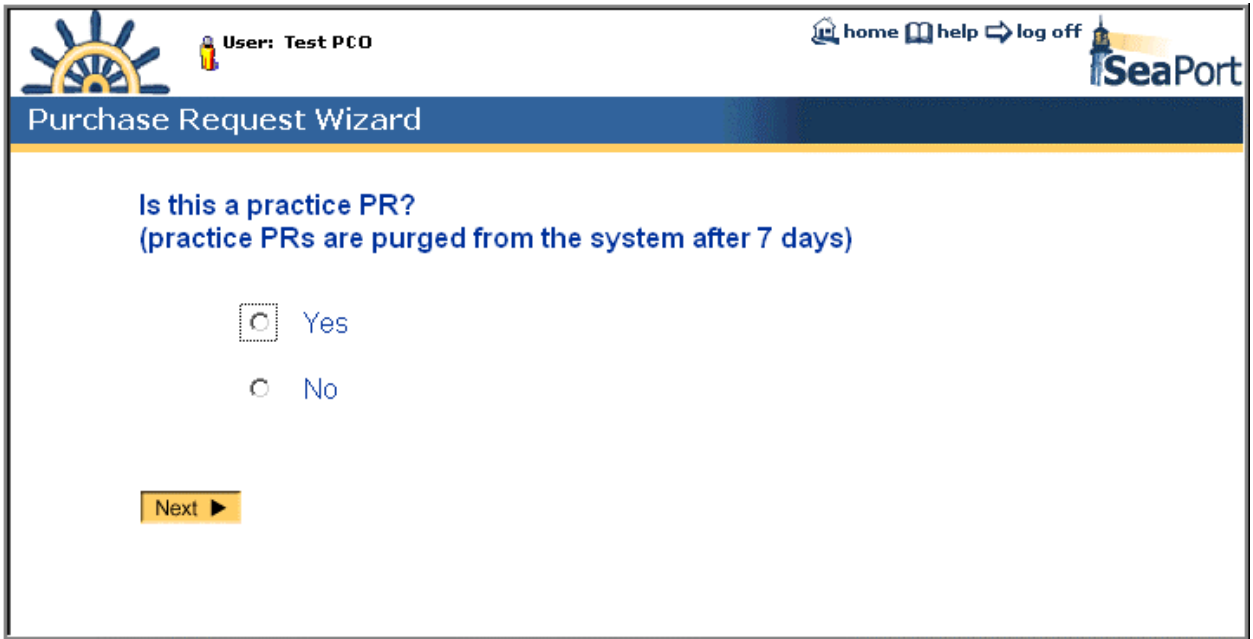


Figure 17: PR Wizard – Practice PR

The next page of the Purchase Request Wizard determines whether the user will require a SeaPort or SeaPort Enhanced effort type. This will depend on what contract you are procuring under. Professional Support Services (Seaport) is for Headquarters and Engineering, Technical and Programmatic Support Services (Seaport Enhanced) is for Field Activities.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

What type of effort do you require?

- Professional Support Services (Seaport)
- Engineering, Technical and Programmatic Support Services (Seaport Enhanced)

◀ Back Next ▶

Figure 18: PR Wizard – Type of Effort

Should the user choose Engineering, Technical and Programmatic Support Services (Seaport Enhanced) in the PR Wizard page shown above, the next page of the wizard will ask the user to choose a Zone.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

Where will this effort be performed?

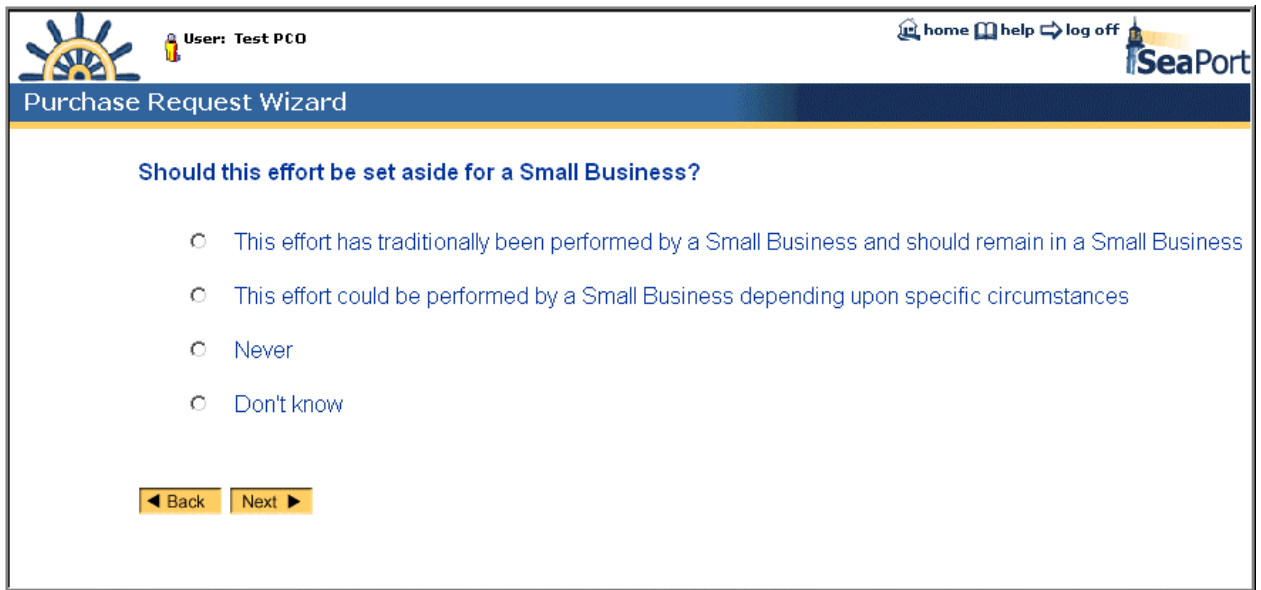
Select zone

◀ Back Next ▶

Figure 19: PR Wizard – Select Zone

The next page of the Purchase Request Wizard asks the user about Small Business Set Aside.

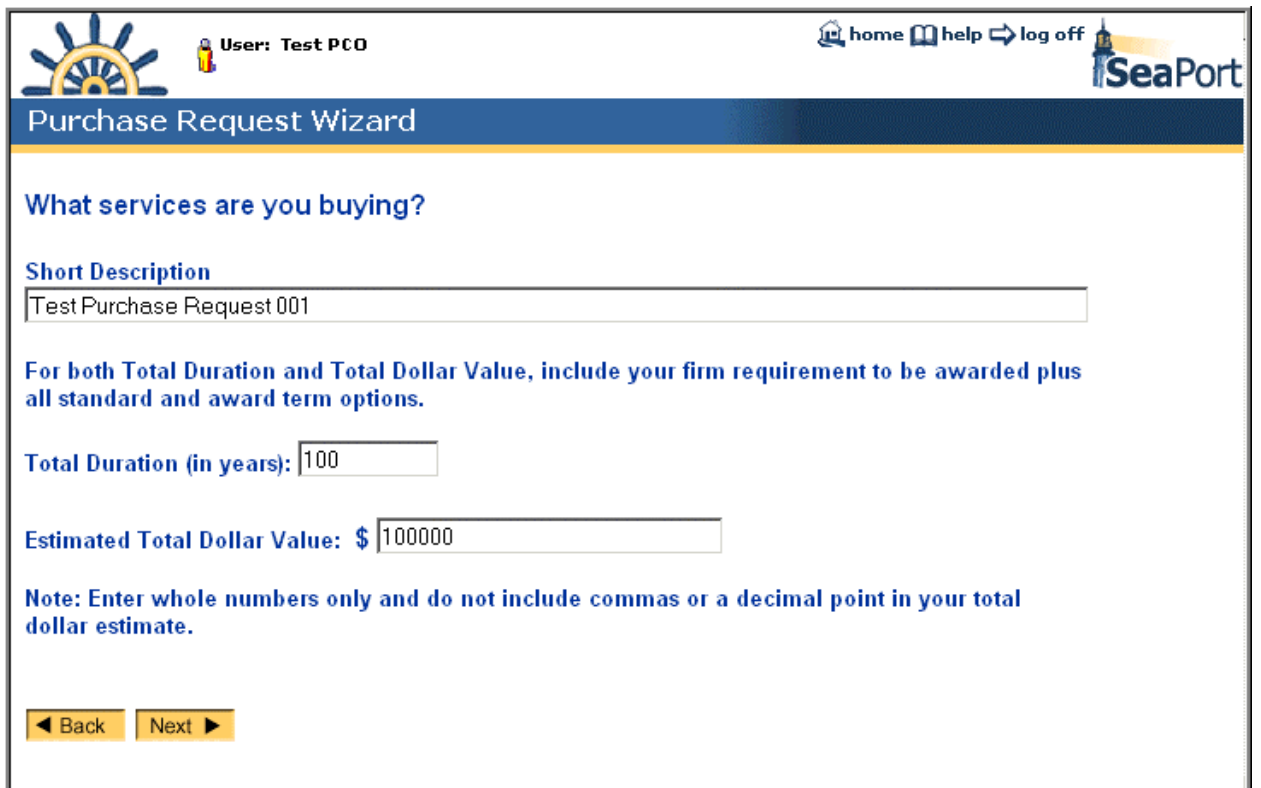
NOTE: This is the first of several Wizard pages that include the “Don’t Know” choice. While this is a valid choice at this stage in the procurement process, it must be modified before the Solicitation Document is released. Ultimately a substantive response must be chosen.



The screenshot shows the 'Purchase Request Wizard' interface. At the top left is a gear icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Purchase Request Wizard'. The question is 'Should this effort be set aside for a Small Business?'. There are four radio button options: 'This effort has traditionally been performed by a Small Business and should remain in a Small Business', 'This effort could be performed by a Small Business depending upon specific circumstances', 'Never', and 'Don't know'. At the bottom are 'Back' and 'Next' navigation buttons.

Figure 20: PR Wizard – Small Business Set Aside

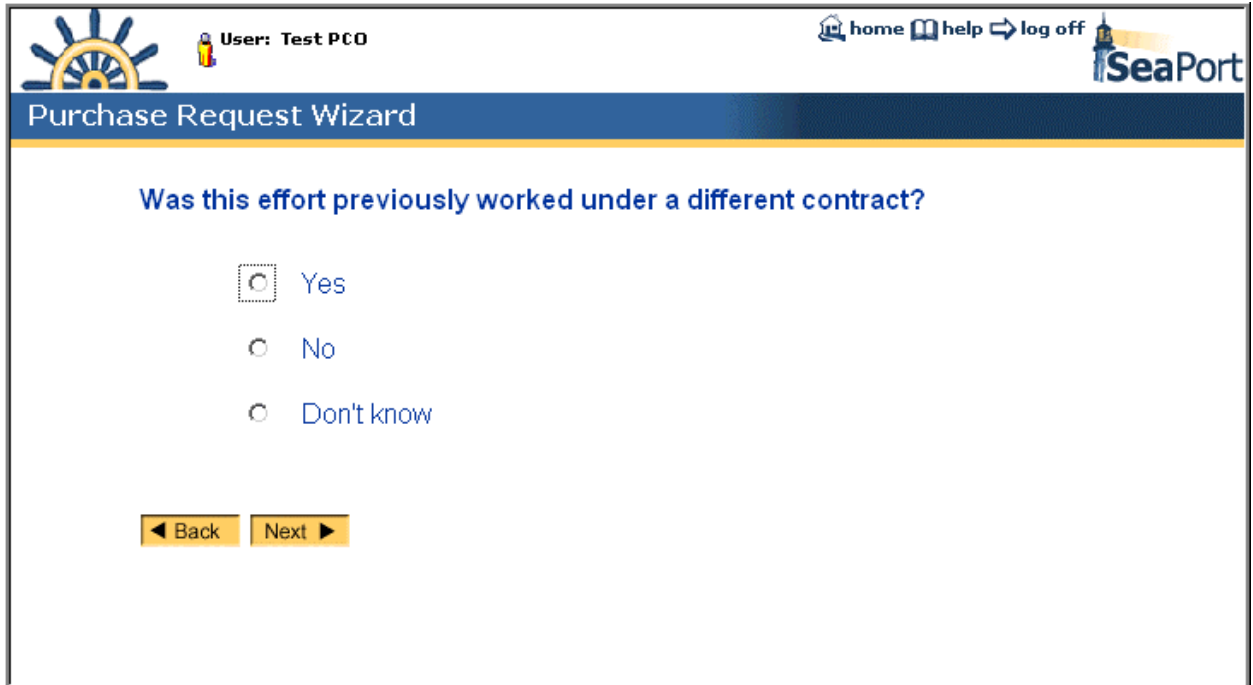
The next page of the Purchase Request Wizard asks the user for information about services. For both Total Duration and Total Dollar Value, include your firm requirement to be awarded plus all standard and award term options for up to five years of requirements in these numbers. Potential award term options that extend beyond five years should not be included in this total.



The screenshot shows the 'Purchase Request Wizard' interface. At the top left is a gear icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Purchase Request Wizard'. The question is 'What services are you buying?'. Below this is a 'Short Description' label and a text input field containing 'Test Purchase Request 001'. A note states: 'For both Total Duration and Total Dollar Value, include your firm requirement to be awarded plus all standard and award term options.' Below this are two input fields: 'Total Duration (in years):' with the value '100' and 'Estimated Total Dollar Value: \$' with the value '100000'. A note at the bottom states: 'Note: Enter whole numbers only and do not include commas or a decimal point in your total dollar estimate.' At the bottom are 'Back' and 'Next' navigation buttons.

Figure 21: PR Wizard – Description of Services

The next page of the Purchase Request Wizard asks the user for information about previous contracts.



The screenshot shows a web application interface for the 'Purchase Request Wizard'. At the top left, there is a logo of a ship's wheel and the text 'User: Test PCO'. At the top right, there are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Purchase Request Wizard'. The central question is 'Was this effort previously worked under a different contract?'. Below the question are three radio button options: 'Yes', 'No', and 'Don't know'. At the bottom of the form, there are two buttons: 'Back' and 'Next'.

Figure 22: PR Wizard – Previous Contract

If the effort was previously worked under a different contract, the user will be asked to enter additional information about the previous contract. This information includes the contractor, the contract number and the contract amount.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

Contractor currently performing the work

Contract Number:

Contract Amount:

Back Next

Figure 23: PR Wizard – Previous Contract Details

The next page of the Purchase Request Wizard asks the user for information about the selection process.

All MAC holders will be given a Fair Opportunity To Compete (FOTC) for prospective task orders, unless one of four exceptions to the FOTC can be met. Both the contracting officer and the ombudsman will review and approve the validity of the use of an exception to FOTC. In addition to using an FOTC, the program office must justify the sole source rationale in the SeaPort PR.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

Is this a competitive procurement or sole source selection?

Competitive

Sole Source

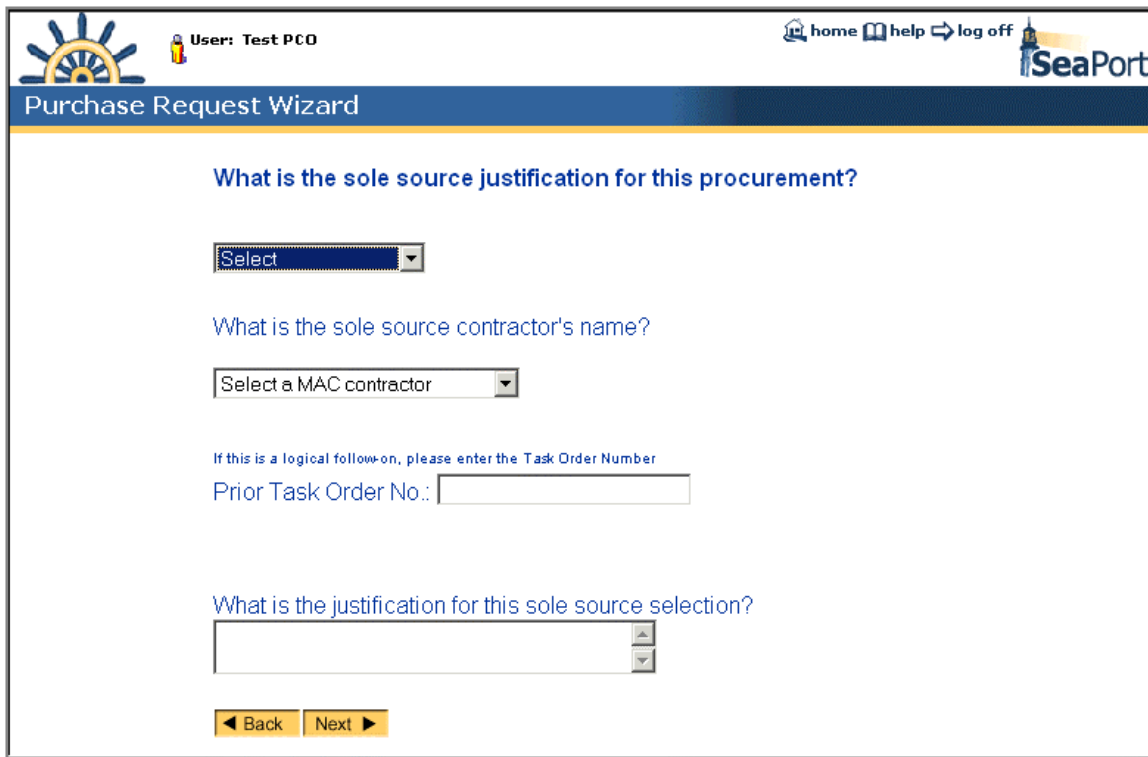
Back Next

Figure 24: PR Wizard – Competitive or Sole Source

Should the user choose a Sole Source selection, the PR Wizard will ask for additional information and a justification for this choice. FOTC Exceptions are listed in the first dropdown box on this page.

The exceptions to FOTC are:

- **Logical Follow-on:** Logical follow-on to an existing order that was placed after all MAC holders were given a fair opportunity to compete. This exception exists for instances where the MAC holder is providing excellent service, efficiently under a task order, and it would be extremely disruptive and inefficient to re-compete the effort. Program offices should explore incorporating award term provisions in the contract rather than attempting to rely on this exception in order to continue a long-term mutually beneficial relationship.
- **Minimum Guarantee:** Necessary to meet the minimum guarantee. The minimum dollar value of orders to be placed under the MACs is relatively low. It is anticipated that this exception will not be used.
- **Only One Capable:** Only one source is capable of providing the necessary products or services at the level of quality required because of the uniqueness or high degree of specialization of the requirement. This exception is virtually identical to the traditional Justification & Authorization (J&A) "only one source" exception and will only be applicable in rare cases. While each of the MAC holders does not have identical capabilities and each has particular areas of expertise, it is unlikely that the required professional support services are so specialized or highly technical that there truly is only one MAC holder capable of meeting the requirement. The program office will need to explain why the task requires such specialization and/or unique capabilities and why they believe only one MAC holder can meet the requirement.
- **Urgency:** Because of urgency, providing a fair opportunity would result in unacceptable delays. This is also comparable to a J&A exception to full and open competition and the standards for use of this exception are the same. The program office needs to demonstrate that the requirement is of such unusual and compelling urgency that a delay in award would result in serious injury to the Government. This exception will only be valid in legitimate emergent situations; failure to plan for or anticipate program needs will not be considered legitimate reasons to proceed without competition.



User: Test PCO

home help log off

SeaPort

Purchase Request Wizard

What is the sole source justification for this procurement?

Select

What is the sole source contractor's name?

Select a MAC contractor

If this is a logical follow-on, please enter the Task Order Number

Prior Task Order No.:

What is the justification for this sole source selection?

Back Next

Figure 25: PR Wizard – Sole Source Justification

The next page of the Purchase Request Wizard asks the user to choose best value or low cost.

The program manager needs to determine if the competition will be evaluated on a best value to the Government basis or on the low cost/technically acceptable basis. If best value is to be used, the importance of the factors (technical, past performance, and price) must be determined. The order of importance of factors is at the discretion of the program office, based upon what is in the best interest of the program. These areas should correspond with and relate to the specific requirements set forth in the Statement of Work.

The screenshot shows the 'Purchase Request Wizard' interface. At the top left is a ship's wheel icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Purchase Request Wizard'. The central question is 'Is this a Best Value or Low Cost Technically Acceptable?'. Below the question are two radio button options: 'Best Value' and 'Low Cost'. At the bottom are two yellow buttons: 'Back' and 'Next'.

Figure 26: PR Wizard – Best Value or Low Cost

The next page of the Purchase Request Wizard asks the user for information about the relative importance of the following:

- Technical Criteria
- Past Performance Criteria
- Price Criteria

The screenshot shows the 'Purchase Request Wizard' interface. At the top left is a ship's wheel icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Purchase Request Wizard'. The central instruction is 'Using the drop-down boxes, please select the relative importance for each of the following evaluation criteria.' Below this is a table with two columns: 'Criteria' and 'Relative Importance'. The table contains three rows: 'Technical Criteria' with a 'First' dropdown, 'Past Performance Criteria' with a 'Second' dropdown, and 'Price Criteria' with a 'Third' dropdown. At the bottom are two yellow buttons: 'Back' and 'Next'.

Criteria	Relative Importance
Technical Criteria	First
Past Performance Criteria	Second
Price Criteria	Third

Figure 27: PR Wizard – Evaluation Criteria

The next page of the Purchase Request Wizard asks the user for information about proposal requirements and evaluation criteria.

Written Proposals

If you select to receive written proposals, you need to decide how many pages the bidders can submit for their technical approach, their management approach, and their experience statement. You can also choose whether or not to receive resumes from those individuals who would be performing the service.

Oral Presentations

If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose if you would like to receive written overviews to review. Indicate this information in the Proposal Requirements and Evaluation Criteria text field.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

Steps	Resumes	Oral Presentation
<input type="radio"/> 1 Step	<input type="radio"/> Yes	<input type="radio"/> Yes
<input type="radio"/> 2 Step	<input type="radio"/> No	<input type="radio"/> No
<input checked="" type="radio"/> Don't know	<input checked="" type="radio"/> Don't know	<input checked="" type="radio"/> Don't know

Proposal Requirements and Evaluation Criteria

Criteria text goes here.

Maximum # of pages requested for Technical Approach:

Maximum # of pages requested for Management Approach:

Maximum # of pages requested for Experience Statement:

◀ Back Next ▶

Figure 28: PR Wizard – Proposal Requirements

The next page of the Purchase Request Wizard asks the user for information about the structure of the Task Order. The user is asked to choose whether or not to structure the task order to be cost type in the base period and fixed price for option periods

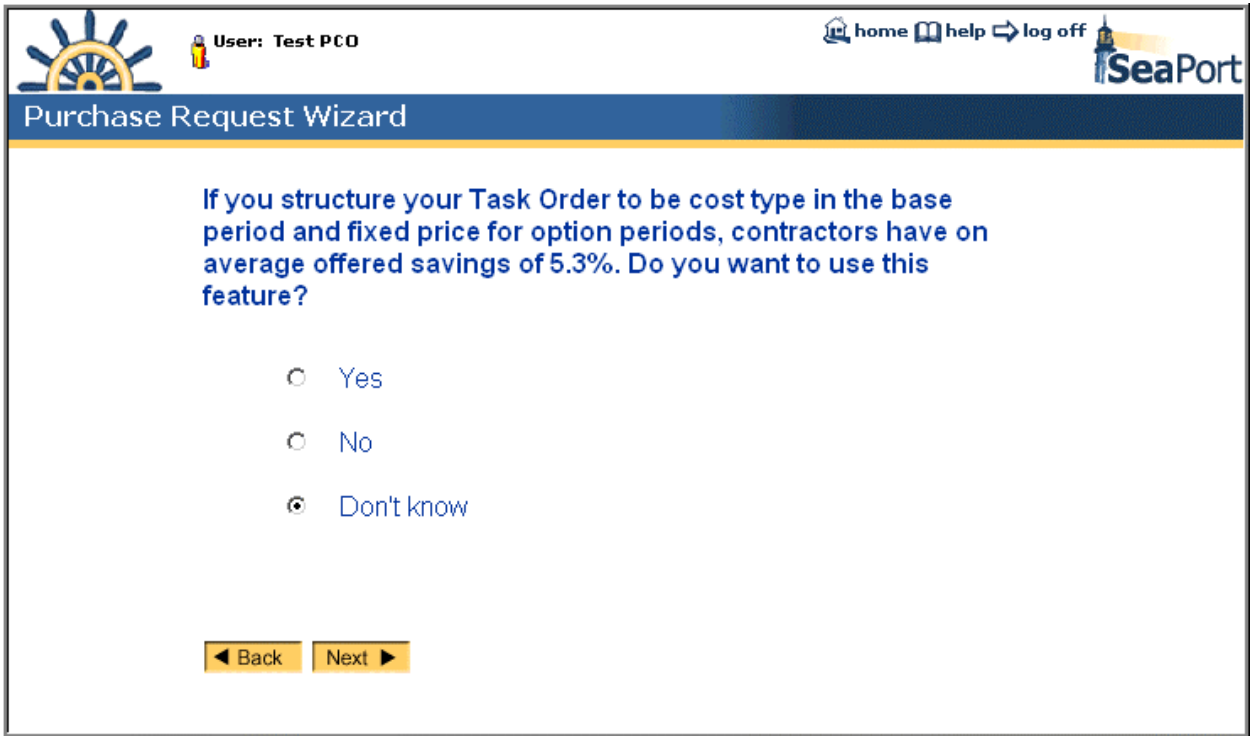


Figure 29: PR Wizard – Guaranteed Savings

Should the user choose not to structure the task order to be cost type in the base period and fixed price for option periods, the PR Wizard will ask for a justification of this choice.



Figure 30: PR Wizard – Non-Conversion Justification

The next page of the Purchase Request Wizard asks the user whether or not to include award term provisions. Choosing Yes here inserts the provisions and clauses in the Requirements.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

Would you like to include award term provisions?


Yes

No

Don't know

◀ Back Next ▶

Figure 31: PR Wizard – Award Term Provisions


The next page of the Purchase Request Wizard asks the user for the award date and additional comments. Use the calendar icon  to conveniently enter the Date.

User: Test PCO

home help log off SeaPort

Purchase Request Wizard

What is the targeted award date?

Date: 

In the area below, enter any additional comments concerning this action.

◀ Back Create Purchase Request ▶

Figure 32: PR Wizard – Award Date

The next page of the Purchase Request Wizard provides the Purchase Request number and gives the user the opportunity to Route the Purchase Request or Continue. Routing the PR to another user gives that user the opportunity to review and to comment on the data that has been entered up to this point. When the other user has finished reviewing the PR information he can route it back to the Originator or to another user. A PR that has been router to a user will appear in that user's mailbox.

- By selecting Continue, the user will see the main PR panels. All of the information that was entered into the Wizard will be auto-populated into the appropriate place in the main PR panel.
- By selecting Route, the Originator can display the Route Sheet for the Purchase Request created through the Wizard and use it to route the Purchase Request to other users for input before sending to SSAPO.

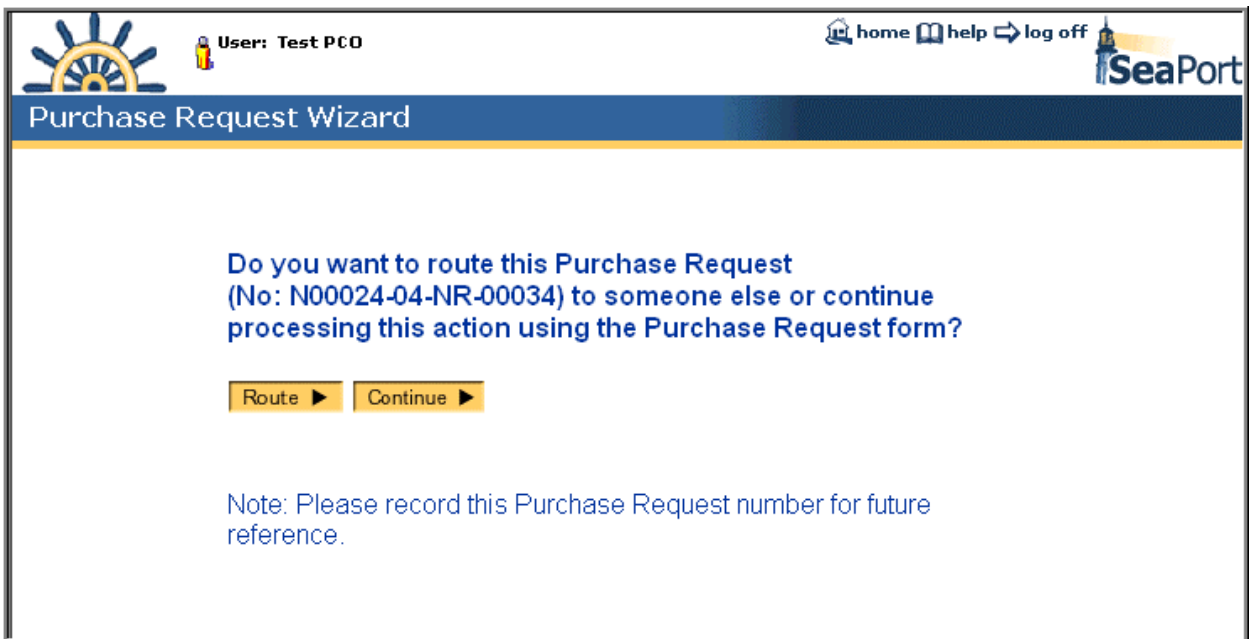


Figure 33: PR Wizard – Route PR

2.2.1.1 Route

SeaPort workflow enables users to route action items to other authorized users by choosing the *Route* button found on nearly all screens. The routing convention used by SeaPort is ad hoc. Users are prompted to recommend a routing, but that routing is not forced. Users should be aware that workflow routing does not take place concurrently. If a PR is routed to another person for action, nobody other than that person will have access to any information (other than read only). Because of this non-concurrent routing, it is important that information be routed to the right person.

SeaPort notifies users via email that a purchase request has been routed to them.

Selecting Route will display the Route Sheet for the PR shown in Figure 34 below. It contains the following data fields and buttons.

Table 10: PR Route Sheet - Fields

Field	Type	Description
Suggested Route	Text Box	Enter a suggested route (i.e. user names) to be used by subsequent routees, general comments to be reviewed by subsequent routees, or both. Note: This selection does not actually route the document.
User Name	Text Box	Enter the user name that the document will be routed to.

Table 11: PR Route Sheet - Buttons

Button	Description
Return to Form	The <i>Return to Form</i> button goes back to the current document.
Save Suggested Route	The <i>Save Suggested Route</i> button saves the entry in the Suggested Route field.
Find User	Use the <i>Find User</i> button to search for one or more users.
Route to User	The <i>Route to User</i> button routes the document to the user in the User Name field.

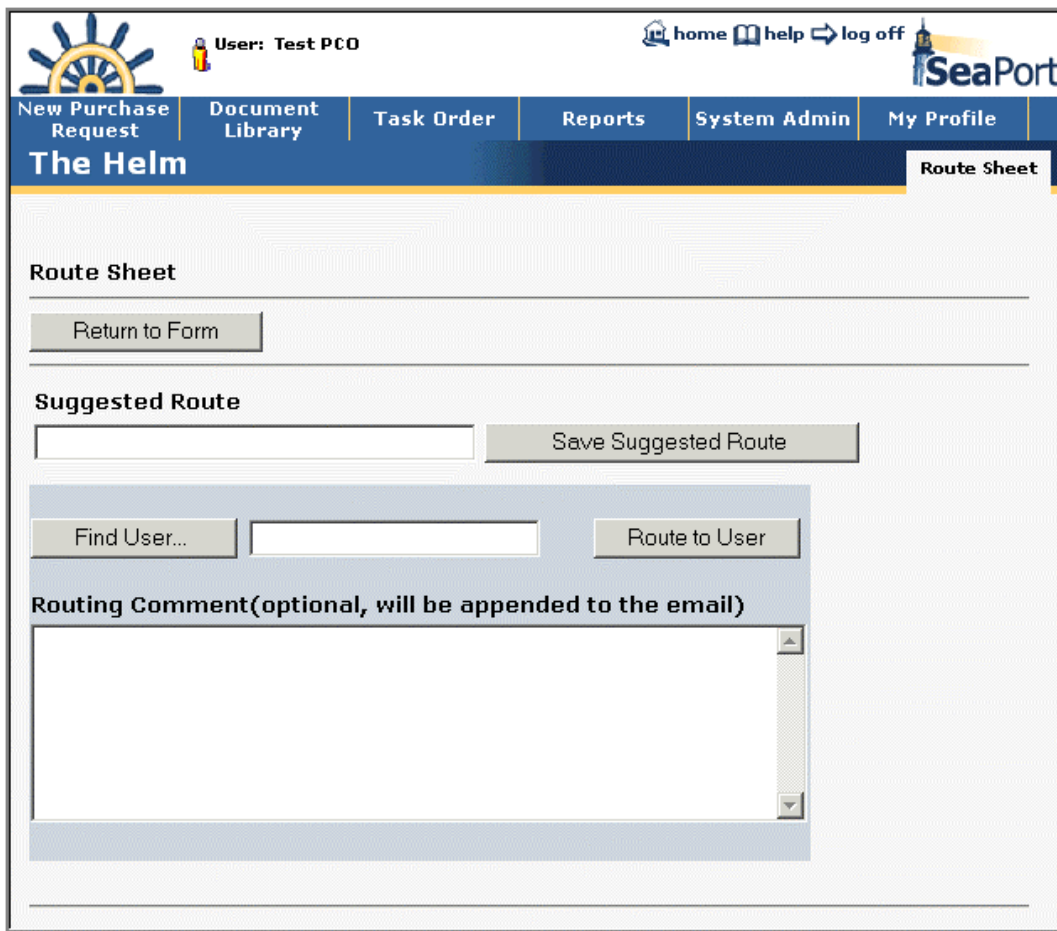


Figure 34: PR Wizard - Route

2.2.1.2 Continue

Selecting Continue will display the Administrative data panel of the new purchase request. See section 2.2.3.

2.2.2 Create Purchase Request by cloning

After selecting an existing PR from the document library, use the clone icon to create a new PR with the same attributes.



Figure 35: Package Home

Selecting the clone icon will display the following window.

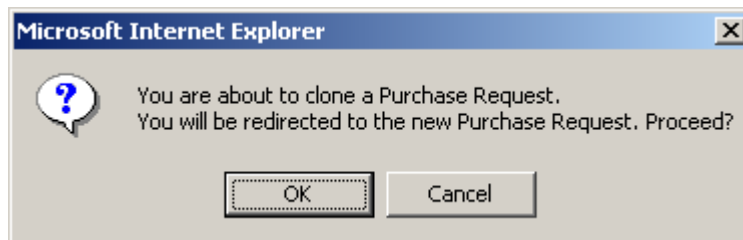


Figure 36: Clone PR




Selecting OK will create a new purchase request with the same attributes as the one that is cloned. The Administrative data panel of the new purchase request will be displayed. See section 2.2.3 for more information on the Administrative Data panel.

2.2.3 Add Administrative data

The Administrative Panel contains all information required to properly administer an acquisition. Included are Originator, Activity, Task Order Manager, and Financial POC information. Most of the Originator Information will be auto-populated. All of the Administrative fields must be furnished before it is eligible to be processed. It contains the following data fields and buttons.

NOTE: Some actions require specific levels of authority within the system. Not all buttons will be available to all users.

Table 12: PR Administrative Panel - Fields

Field	Type	Description
Originator	Read Only	This field is pre-filled based on the login ID of the person who originated the PR.
Edit		Allows the user to select an Originator using the User Search function.
User Information		View the SeaPort Profile of the Originator or the Task Order Manager (TOM).
Program Office	Text Box	Enter the name/number of the Program Office.
Originator's Office	Read Only	This field is pre-filled based on the User Profile of the person who originated the PR.
Date of Origination	Read Only	This field is pre-filled based on the system date.
Code	Read Only	This field is pre-filled by SeaPort.
Activity	Dropdown	Choose an Activity from the list.
Requisition	Dropdown	This is a text field. Enter any external references or references to other systems here. If this does not apply, enter "N/A". This field is required.
Task Order Manager Name	Dropdown	Choose the name of the Task Order Manager. The dropdown list will contain only those TOMs that are in the document's Activity. To see a list of all TOMs in the system, use the View All icon  described below. The function of TO Manager is to certify work order for payments to be made. Similar to a Contracting Officer's Representative (COR), the Task Order Manager or TOM is the individual who acts as a procurement official through the preparation and definition of statement of work requirements and the evaluation of vendor proposals. The TOM provides front line, day-to-day monitoring of the task order during execution. Essential to the TOM is the maintenance of official files, including correspondence and past performance. The TOM is the only one who is able to create entries in the Task Order Evaluation within the SeaPort portal. Contact a SeaPort contracting officer if you are not sure who would serve as the TOM for the services that being requested.



Field	Type	Description
View All		View a list of all TOMS in the system. This list opens in a pop-up window.
POC	Text Box	<p>The financial point of contact is most likely the Business and Financial Manager (BFM) for the program/program office that is requesting the services. This information is needed in case SEA 02 or SEA 01 has questions about the funding of the procurement.</p> <p>This person can be either the BFM or the Originator, whomever has Program Manager cognizance over the funding. Contact a SeaPort contracting officer if you are not sure who is your financial point of contact for the services being requested.</p>
Zone of Performance	Dropdown	Choose a zone of performance from the dropdown list. Zones can be displayed by selecting the zone map icon.
Display Zone Map		Displays a geographical color-coded zone map in a pop up window.
Set Aside	Radio	<p>Set Aside will be the attribute of the package and can be changed through the Purchase Request/Solicitation stages of the package until the Solicitation is released. Choose Full Set Aside, Cascade, or No.</p> <p>If user selects "Full Set Aside", Section M will be automatically populated with Complete Set Aside clause.</p> <p>If user selects "Cascade", Section M will be automatically populated with Cascading Set Aside clause.</p> <p>If user selects "No", no Set Aside provisions are automatically inserted in to Section M.</p> <p>Note: The system will not automatically update Section M to remove the Set Aside clause if user deselects Set Aside option after selecting it previously.</p>

Table 13: PR Administrative Panel - Buttons

Button	Description
Save	Pressing this button updates information in the database.
Validate PR	Pressing this button ensures that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition. This notification is in the form of a message window indicating the missing fields.

Button	Description
Create Solicitation	<p>Pressing this button causes the system to run a validation routine ensuring that the draft PR has all required fields populated. If true, the system successfully validates and creates the draft solicitation. If the validation fails, the system reports the errors requiring attention via a message box.</p> <p>Upon successful validation the system generates a draft solicitation, provides a unique solicitation number, and populates most of the solicitation fields with the data from the PR.</p> <p>Note: Only a PCO will have the authority to create a solicitation. Other users will not have this button available.</p>
Printable PR	<p>Pressing this button opens a new browser window containing a form that displays all of the PR information from all Panels. This form is read only and is specially formatted for better printing results.</p>
1102 Sandbox	<p>Pressing this button opens a new browser window containing a form that can be used to store temporary 1102 information.</p>
Printable PR Pricing	<p>Pressing this button opens a new browser window containing a printable version of the Purchase Request's pricing structure.</p>

NOTE: The Save, Validate PR, Create Solicitation, Printable PR, 1102 Sandbox, and Printable PR Pricing buttons are common to several of the PR panels. They always perform the same function.

User: Test PCO
home help log off

New Purchase Request
Document Library
Task Order
Reports
System Admin
My Profile

The Helm
Package
Purchase Req.
Small Business

Administrative

Pricing Structure

Requirements

Procurement

Attachments

Evaluation Team

Criteria

Save
Validate PR
Create Solicitation
Printable PR

1102 Sandbox
Printable PR Pricing

Purchase Request Number: N00024-04-NR-00263

Originator Information

Originator	Test PCO	Program Office	
Originator's Office	Washington's Navy Ya	Date of Origination	4/21/2004
Code	SEA 0255		

Activity Information

Activity: NSWC, CARDEROCK DIVISION, MARYLAND

Requisition No.

Task Order Manager Information

Name: Select TOM

Financial POC

POC:
POC Name & Phone Number

Zone of Performance

Zone of Performance: Northeast Zone

Set Aside

Set Aside: Full Set Aside Cascade No

Figure 37: PR – Administrative

2.2.4 Add Pricing Structure data




The purpose of the Pricing Structure Panel is to lay out the Contract Line Item Number (CLIN) structure of the Task Order. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. The Purchase Request Pricing Structure panel replicates this structure. Information such as Total Duration and Estimated Total Cost will be provided by the Wizard. It contains the following data fields and buttons.

Table 14: PR Pricing Structure Panel – Fields

Field	Type	Description
Total Duration (in years)	Text Box	Enter the total duration of the contract.
Guaranteed Savings	Radio	Choose Yes or No.
Estimated Total Cost	Text Box	Originator should enter their best estimate about these values. This is for planning purposes only, but all fields must contain a value. Enter the estimated total cost of the contract.
Non-conversion Justification	Text Box	Enter the Justification for not structuring your Task Order to be cost type in the base period and fixed price for option periods.
New CLIN Window		
CLIN ID	Dropdown	Choose from 0001 – 0009. Each CLIN ID corresponds to a specific cost type and period of performance. See table in Figure 39.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
New SLIN Window		
SLIN ID #	Text Box	Enter a valid 2-letter combination. User should enter SLINs sequentially starting with AA.
Fund Type	Dropdown	Choose from the list. See table in Figure 43.
FMS Case Number	Text Box	If FMS funding is used, specify the case. Enter the case number in the format AA-A-AAA.
Firm or Option	Dropdown	Enter whether this requirement will be placed at time of award or if it is a future requirement. Choose Firm or Option.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Unit of Issue	Dropdown	Choose Labor Hours, Lot, or Labor Years.
Fiscal Year	Dropdown	Enter the fiscal year for the money being used. Choose the last 2 digits of the fiscal year from the list.
Cost Plus Fee	Text Box	Originator should enter their best estimate. This is for planning purposes only, but all fields must contain a value. Enter the dollar amount. (14 digit limit)
Quantity	Text Box	If level of effort, your estimate of the number of man-hours required. If completion, enter the numeral 1; unit of issue is "Lot". Enter the quantity. (9 digit limit)
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Unit Price	Read Only	This field is calculated based on other data.
Period of Performance	Dropdown	Enter when performance starts and when performance ends. Choose From and To dates using the dropdown lists.

Field	Type	Description
Short Description	Text Box	Enter a very short description (e.g., Logistics Support for SEA 02) that will appear in Section B of the Task Order. Enter up to 1000 characters.

Table 15: PR Pricing Structure Panel – Buttons

Button	Description
New CLIN	Click the <i>New CLIN</i> button to add a contract line item number (CLIN). You must also enter a short description for the CLIN. After saving the CLIN, you can then add its associated SLINs. When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.
CLIN/SLIN Wizard	Opens the Pricing Line Item Wizard described in section 2.2.4.3 below.
Timeline...	Opens the Timeline window described below.
Expand CLINs	Allows the user to see all SLINS associated with a CLIN. CLINs are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).
Actions	Choose the pen icon  to edit, the trashcan icon  to delete, or the disk icon  to save.

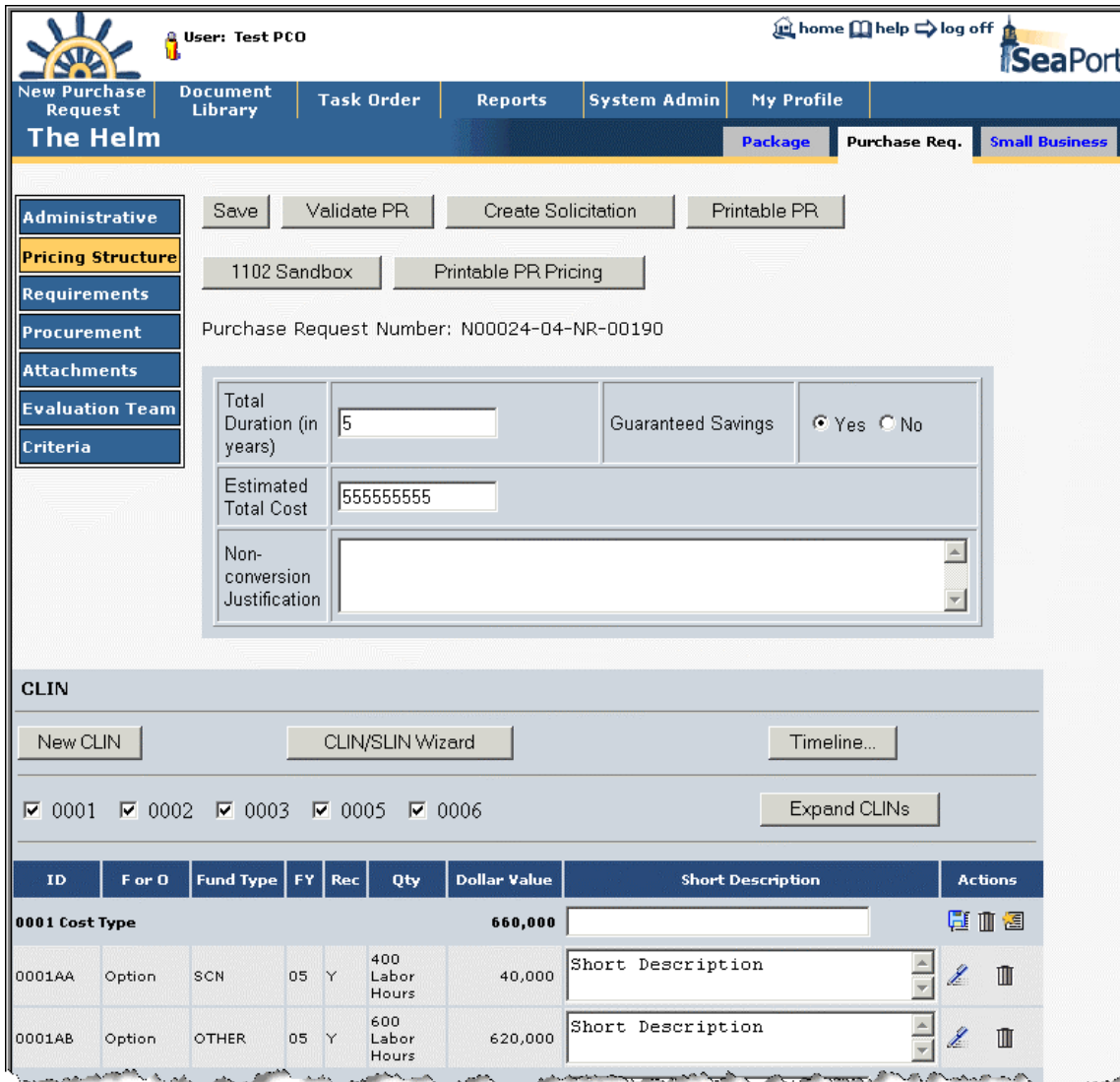


Figure 38: PR - Pricing Structure

2.2.4.1 New CLIN

The SeaPort system supports CPFF, CPAF, CPIF, FFP, and Cost Type CLINs.

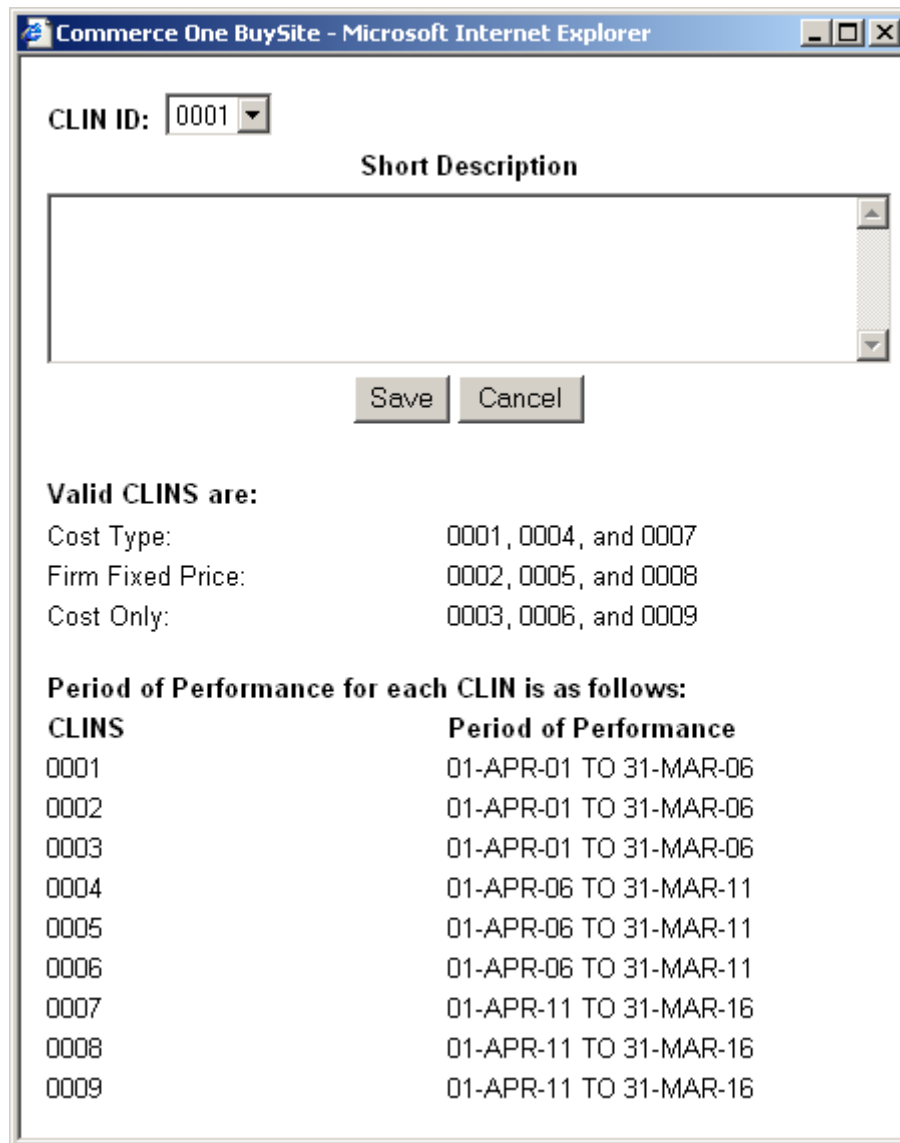
Users are offered two techniques for developing the pricing structure. They can employ the CLIN/SLIN Wizard, and/or work from the CLIN/SLIN table (which is more time intensive). Often the ideal procedure is to use the CLIN/SLIN Wizard first to quickly create the table of CLINs/SLINs, then individually edit at the SLIN level via the table as required. The following sections describe the details of this functionality.

Selecting the *New CLIN* button will open the window shown in Figure 39 below as a pop up. After selecting New CLIN the user must select from the drop down list the appropriate CLIN number that they wish to procure with and provide a short description of the new CLIN. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. After clicking "Save," the CLIN is added and the user is returned to the main panel.

2.2.4.1.1 CLIN Structure

The MAC contracts contain contract line item numbers (CLINs) that can accommodate both Cost-Plus-Fixed Fee and Firm Fixed Price requirements. Each of these CLINs has a five-year period of performance. Including options, the maximum total potential duration of the MAC contracts is fifteen years. Every Task Order will follow the same general CLIN structure that was established in the MAC contracts:

- **COST-PLUS-FIXED FEE (CPFF)** Item 0001, Option Items 0004 and 0007 - All requirements for Cost-plus-Fixed Fee (CPFF) level of effort (hours) or completion type services will be placed under these CLINs. Other Direct Costs, e.g. travel, associated with performance of work under these CLINs are included separately under Item 0003 and option Items 0006 and 0009 since contractors will not be paid any fee on the ODC costs.
- **FIRM FIXED PRICE (FFP)** Item 0002, Option Items 0005 and 0008 - All requirements for firm fixed price level of effort (hours) or completion type services will be placed under these CLINs. Included in the price are all direct and indirect costs, including Other Direct Costs, to complete the effort and profit.
- **COST ONLY** Item 0003, Option Items 0006 and 0009 - These are cost only CLINs (contractor receives no fee) where contractors will be reimbursed for the allowable, allocable and reasonable other direct costs (ODCs) required to perform effort under Items 0001 and Option Items 0004 and 0007. These items may include costs such as travel, facilities, incidental supplies, and mailing/packaging costs. Whether or not a specific type of charge should be classified as an ODC directly chargeable to the contract will depend on the Contractor's accounting system.



CLIN ID: 0001

Short Description

Save Cancel


Valid CLINS are:

Cost Type: 0001, 0004, and 0007
 Firm Fixed Price: 0002, 0005, and 0008
 Cost Only: 0003, 0006, and 0009

Period of Performance for each CLIN is as follows:

CLINS	Period of Performance
0001	01-APR-01 TO 31-MAR-06
0002	01-APR-01 TO 31-MAR-06
0003	01-APR-01 TO 31-MAR-06
0004	01-APR-06 TO 31-MAR-11
0005	01-APR-06 TO 31-MAR-11
0006	01-APR-06 TO 31-MAR-11
0007	01-APR-11 TO 31-MAR-16
0008	01-APR-11 TO 31-MAR-16
0009	01-APR-11 TO 31-MAR-16

Figure 39: PR - New CLIN

At this point, Sub-Contract Line Item Numbers (SLINs) may be added by choosing the *New SLIN* button  and entering the appropriate information. SeaPort provides the first SLIN automatically.

2.2.4.2 New SLIN

A SLIN is a sub line item number. CLINS are comprised of SLINS. To create a new SLIN, a CLIN must first be created.

Under the MACs most task orders will have numerous SLINs. This is driven by two things:

1. Unlike most existing NAVSEA service contracts that have a separate CLIN for each year's requirements, each CLIN of the MACs extends for five years of performance. To create annual options, it will be necessary to create separate SLINs. For example, a base period plus two option periods will require three SLINs:

- 1 0002AA Base Year
- 2 0002AB First Option Year
- 3 0002AC Second Option Year

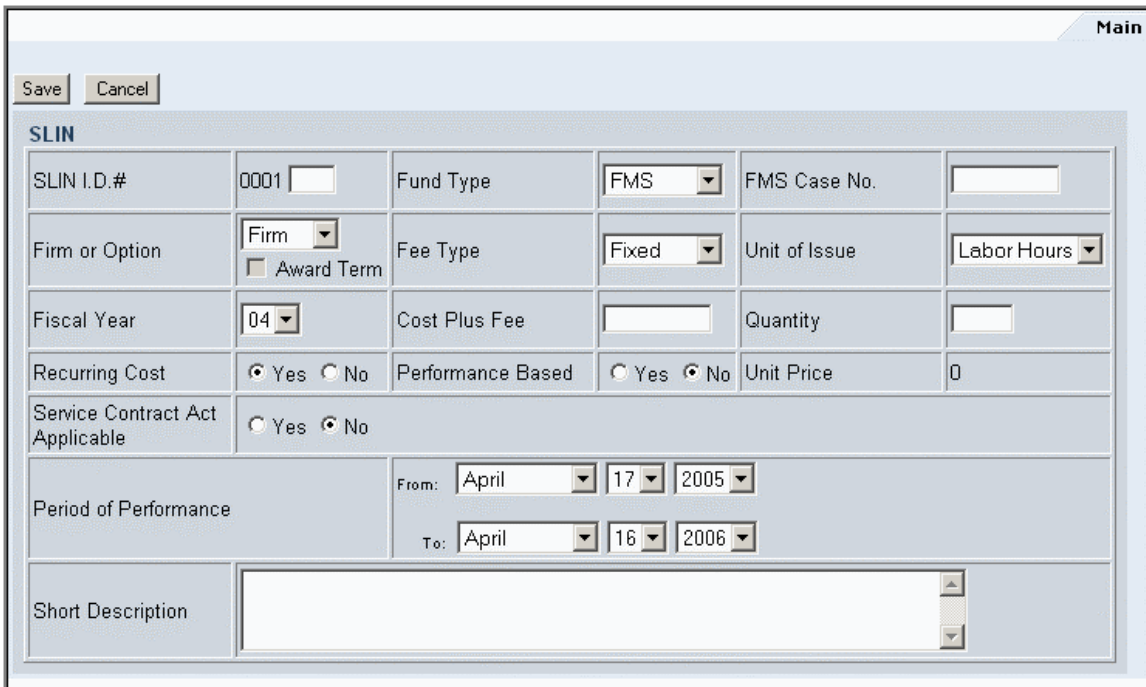
NOTE: While a CLIN can last for five years, rules regarding availability of funds for obligation and expenditure still govern how the period of performance for a specific SLIN is structured (e.g., O&M,N expires at the end of the fiscal year)

2. The rule regarding only having one line of accounting for each SLIN still applies. So to accommodate the use of different funds, it will be necessary to use different SLINs, just as NAVSEA currently does.

Selecting the  icon on the CLIN line opens the New SLIN page.

The image below shows the New SLIN page. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

NOTE: When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.




The screenshot shows a 'New SLIN' form with the following fields and values:

SLIN I.D.#	0001	Fund Type	FMS	FMS Case No.	
Firm or Option	Firm <input type="checkbox"/> Award Term	Fee Type	Fixed	Unit of Issue	Labor Hours
Fiscal Year	04	Cost Plus Fee		Quantity	
Recurring Cost	<input checked="" type="radio"/> Yes <input type="radio"/> No	Performance Based	<input type="radio"/> Yes <input checked="" type="radio"/> No	Unit Price	0
Service Contract Act Applicable	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Period of Performance	From: April 17 2005 To: April 16 2006				
Short Description					

Figure 40: PR - New SLIN

2.2.4.3 Pricing Line Item Wizard

The Pricing Line Item Wizard allows a user to quickly create even a large pricing structure very quickly. This is because the system can automatically generate associated option SLINs without the user having to tediously generate each one by one. Start the Pricing Line Item Wizard by selecting the *CLIN/SLIN Wizard* button from the Pricing Structure Panel.

The first page of the Wizard allows you to enter Period of Performance data for the base period of the task. The user can either directly edit the text box or select a date from the date control by clicking on the calendar icon  located to the right of the text box. The Date From defaults to a date that is two weeks from today's date. The default period is one year.


User: Test PCO

home help log off SeaPort

Pricing Line Item Wizard

When running the wizard, you must complete all steps to have your information saved to the database. If you exit the wizard before completing all steps, your data will be lost.

What is the Period Of Performance for the base period?

Date From: 


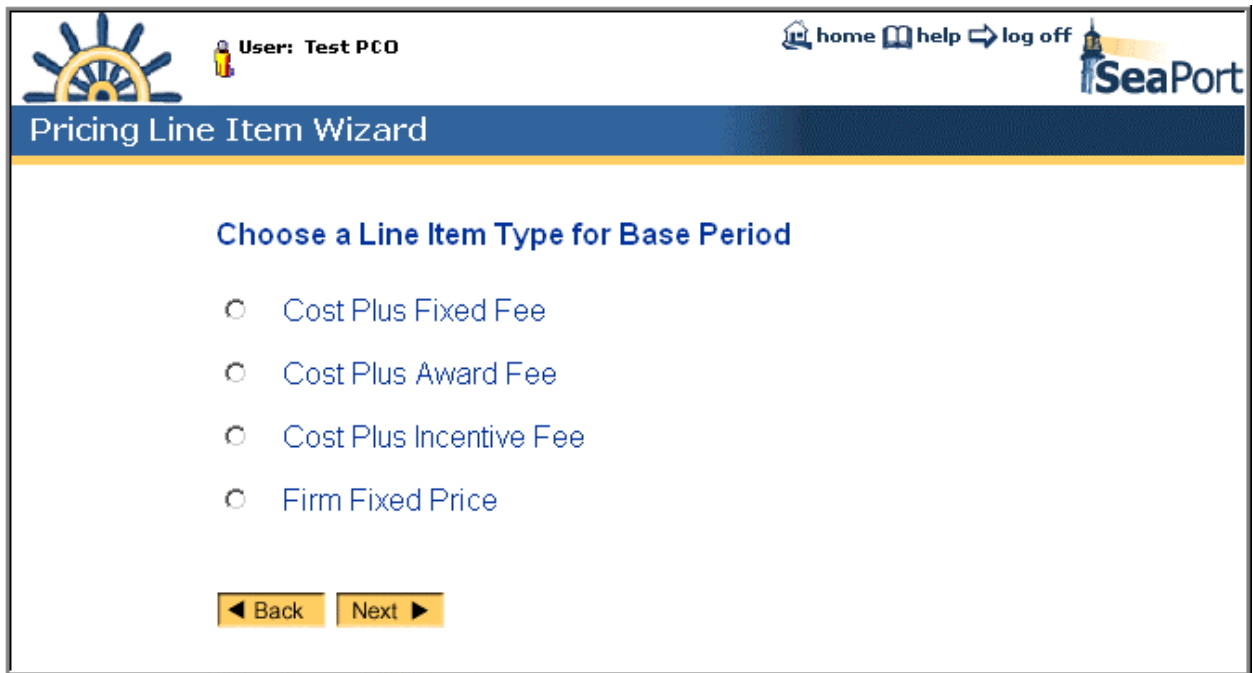
Date To: 

Figure 41: PR – Pricing Line Item Wizard – Period of Performance

The next page of the Wizard allows you to choose a line item type for the base period. Depending on your choice here, one of the following 4 pages will be displayed: Cost Plus Fixed Fee, Cost Plus Award Fee, Cost Plus Incentive Fee, Firm Fixed Price. Should you wish to create more than one type of CLIN, you can do so later. After creating the first CLIN, the system will ask if you wish to create another CLIN. At this point, you will be brought back to this same page in order to create the subsequent CLIN.



User: Test PCO

home help log off

Pricing Line Item Wizard

Choose a Line Item Type for Base Period

- Cost Plus Fixed Fee
- Cost Plus Award Fee
- Cost Plus Incentive Fee
- Firm Fixed Price

◀ Back Next ▶

Figure 42: PR – Pricing Line Item Wizard – Line Item Type

The next page asks the user to select the checkboxes of all fund types that will be used on the procurement. The fund types are chosen from the table below.

NOTE: If you wish to add a fund type that does not appear on the list, you should contact your SeaPort administrator or choose OTHER.

Pick All That Apply	Fund Type
<input type="checkbox"/>	FMS
<input type="checkbox"/>	OPN
<input type="checkbox"/>	O&MN,N
<input type="checkbox"/>	O&MN,R
<input type="checkbox"/>	PANMC
<input type="checkbox"/>	RDT&E
<input type="checkbox"/>	SCN
<input type="checkbox"/>	WPN
<input type="checkbox"/>	OTHER
<input type="checkbox"/>	TBD
<input type="checkbox"/>	MDA
<input type="checkbox"/>	NDSF
<input type="checkbox"/>	PMC

Figure 43: PR – Pricing Line Item Wizard – Fund Type

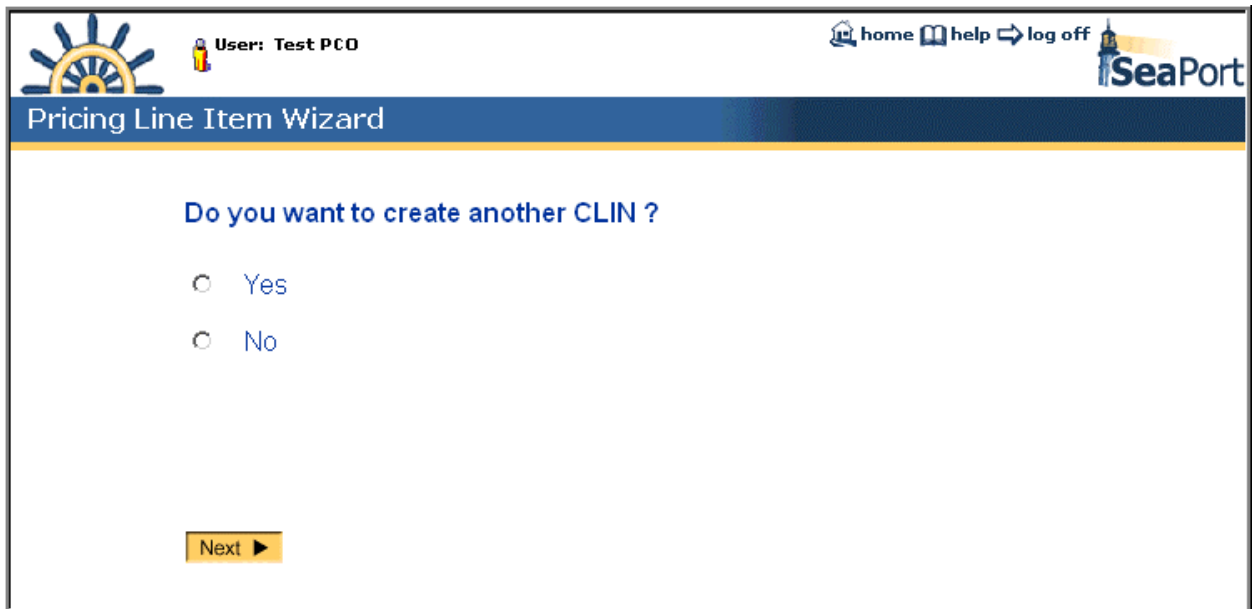
The next page of the Wizard allows you to enter detailed CLIN/SLIN information. The fund types chosen in the previous page of the wizard appear in the Fund Type dropdown list on this Wizard page. After making the selections on this page, the Pricing Structure panel of the PR will be populated with the CLINS and SLINS.

NOTE: Sometimes it is easier to enter all the CLINS and SLINS using the Wizard and then delete any CLINS that you don't need. You may wish to delete a SLIN, for example, if there are ODCs in the first two years, but not in the last years.

The screenshot shows the 'Pricing Line Item Wizard' interface. At the top, it displays 'User: Test PCO' and navigation links for 'home', 'help', and 'log off'. The main heading is 'Pricing Line Item Wizard'. Below this, there is a section for 'Please Select Fund Type: RDT&E for Base Period SLIN'. The 'CLIN Type' is set to 'Cost Plus Incentive Fee'. A table for entering CLIN details is visible, with columns for Case No. (FMS Only), Quantity, Unit of Issue (set to Labor Hours), Total Cost, and Firm Or Option (set to Firm). Below the table, there are fields for 'Short Description', 'Base Period of Performance' (From: 4/21/2004, To: 4/20/2005), and 'Recurring Option Periods' (0 Year(s)). A note states: 'If ODCs will be estimated separately on a cost-only basis, please enter the ODC estimated cost:'. There are 'Add' and 'Delete' buttons. At the bottom, there is an 'SLIN Information Table' with columns: Delete, CLIN, Fund, Quantity, Unit, Total, F/O, Recur, Start Date, End Date. Navigation buttons for 'Back' and 'Next' are at the bottom left.

Figure 44: PR – Pricing Line Item Wizard – CLIN Details

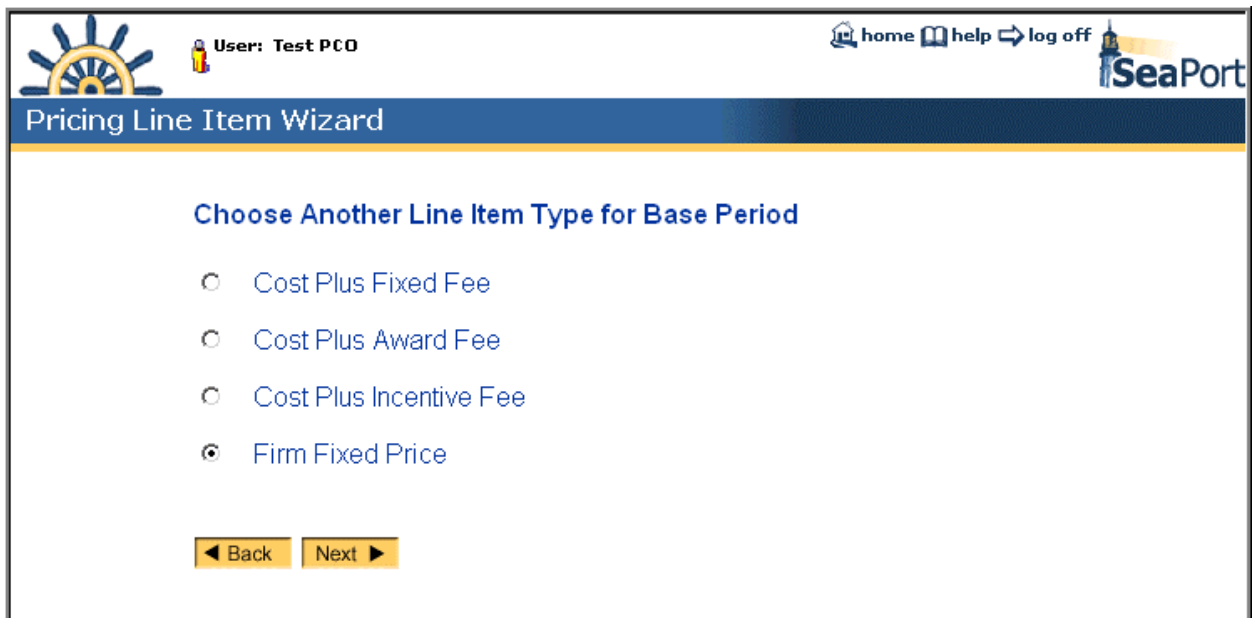
The next page of the Wizard allows you to create another CLIN.



The screenshot shows the 'Pricing Line Item Wizard' interface. At the top left is a gear icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Pricing Line Item Wizard'. The central question is 'Do you want to create another CLIN ?'. Below this are two radio button options: 'Yes' and 'No'. At the bottom center is a yellow 'Next >' button.

Figure 45: PR – Pricing Line Item Wizard – Create Another CLIN

Choosing **Yes** takes you to the Choose Another Line Item Type page where the process can begin again.



The screenshot shows the 'Pricing Line Item Wizard' interface. At the top left is a gear icon and the text 'User: Test PCO'. At the top right are links for 'home', 'help', and 'log off', along with the 'SeaPort' logo. The main heading is 'Pricing Line Item Wizard'. The central question is 'Choose Another Line Item Type for Base Period'. Below this are four radio button options: 'Cost Plus Fixed Fee', 'Cost Plus Award Fee', 'Cost Plus Incentive Fee', and 'Firm Fixed Price' (which is selected). At the bottom center are two yellow buttons: '< Back' and 'Next >'.

Figure 46: PR – Pricing Line Item Wizard – Another Line Item Type

Choosing **No** takes you to the Finish page.

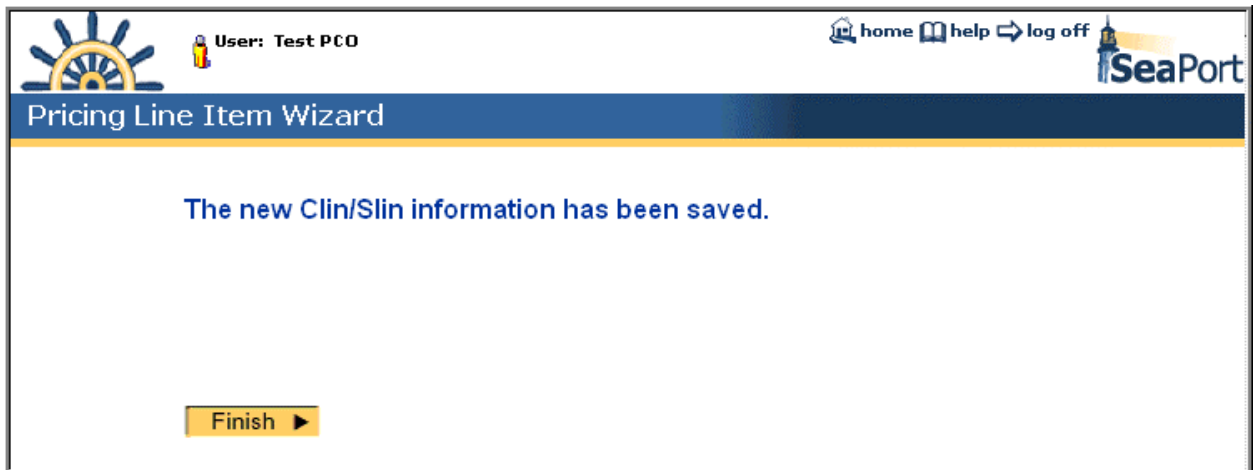



Figure 47: PR – Pricing Line Item Wizard – CLIN/SLIN Save Confirmation

Selecting the *Finish* button here returns you to the Pricing Structure panel with the CLIN/SLIN information (entered using the Wizard) filled in and expanded.

Cost Type CLINS will automatically create a SLIN.

The list of CLINS and SLINS is expanded by default unless there are a large number of CLINS and SLINS. Some Task Orders may have over 200 SLINS. In this case, you may choose to only view the SLINS that you are currently working with. Deselecting the checkbox next to the CLIN ID of the CLINS you don't want to see and then selecting the *Expand CLINs* button will reload the page with only the checked CLINS expanded. This can reduce the scrolling necessary to see all of the pertinent information.

At this point you may choose to edit a SLIN to add additional information. Selecting the edit icon  will open the SLIN window described in section 2.2.4.2 above.

Administrative
Pricing Structure
 Requirements
 Procurement
 Attachments
 Evaluation Team
 Criteria

Save Validate PR Create Solicitation Printable PR

1102 Sandbox Printable PR Pricing

Purchase Request Number: N00024-04-NR-00190

Total Duration (in years)	5	Guaranteed Savings	<input checked="" type="radio"/> Yes <input type="radio"/> No
Estimated Total Cost	555555555		
Non-conversion Justification			

CLIN

New CLIN CLIN/SLIN Wizard Timeline...

0001 0002 0003 0005 0006 Expand CLINs

ID	F or O	Fund Type	FY	Rec	Qty	Dollar Value	Short Description	Actions
0001 Cost Type						660,000		
0001AA	Option	SCN	05	Y	400 Labor Hours	40,000	Short Description	
0001AB	Option	OTHER	05	Y	600 Labor Hours	620,000	Short Description	
0002 Firm Fixed Price						1,160,000		
0002AA	Firm	O&MN,R	05	N	1000 Labor Hours	100,000	Short Description	
0002AB	Firm	O&MN,R	05	Y	2000 Labor	200,000	Short Description	



Figure 48: PR - Pricing Structure

2.2.4.4 Timeline

The *Timeline* button is explained in the Solicitation Document section of this training.

2.2.5 Add Requirements data

The Requirements Panel contains all the information about the actual contractor effort required, including reports, statement of work, packaging and marking, and space is also provided for comments. The Requirements Panel consists of list of links (noted in blue text).

Blank icons  reveal text Sections with no data entered. Filled icons  reveal Sections with existing data. The following sections are available from the Requirements page.

- Comments
- Section C Statement of Work
- Section D Packaging and Marking
- Reports
- Award Term Clause
- Award Term Plan
- Proposal Requirements and Evaluation Criteria

NOTE: The Requirements listed at the PR stage in the procurement cycle are a subset of the total Requirements. The next stage of the procurement cycle, Solicitation Document, will contain all of the Requirements.

Selecting any of these links will bring up a window in which to enter text. An example of such a window is found in Figure 50. Table 16 below details the fields contained on the entry form.

Table 16: PR Requirements Panel - Fields

Field	Type	Description
Comments	Link	The PR Wizard may generate some comments. Enter additional comments here.
Section C Statement of Work	Link	The SOW must be cut-and-pasted or manually entered via the Requirements data entry screen. Do not use the attachment feature to attach the SOW. The statement of work (SOW) should specify in clear, understandable terms the services to be performed by the contractor. Preparation of an effective SOW requires both an understanding of the services that are needed to satisfy a particular requirement and an ability to define what is required in specific, quantitative terms. A SOW prepared in explicit terms will enable offerors to clearly understand the Government's needs. A well-written SOW facilitates the preparation of responsive proposals and the delivery of the required services. A well-written SOW also aids the Government in source selection and contract administration after award.

Field	Type	Description
Section D Packaging and Marking		Packaging and Marking defaults to best commercial standards. If a user opts for special instructions, information must be entered into the text box describing what those special requirements are.
Reports	Link	Reports are comparable to Contract Requirement Deliverables List (CDRL) deliverables. This box defaults to the seven most common reports required under service contracts. This list of reports can be tailored and reports can be deleted and/or added based on the specific requirements of this task order. The Proposed Performance Based Statement of Work for Out-years report should be deliverable 90 days prior to end of first years period of performance and revisions would be as required.
Award Term Clause	Link	Enter Award Term Clause here.
Award Term Plan	Link	Enter Award Term Plan here.
Proposal Requirements and Evaluation Criteria	Link	Enter Proposal Requirements and Evaluation Criteria here.


The screenshot shows the SeaPort system interface. At the top, the user is identified as 'Test PCO'. The navigation bar includes 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The main navigation area is titled 'The Helm' and includes 'Package', 'Purchase Req.', and 'Small Business'. On the left, a sidebar menu lists 'Administrative', 'Pricing Structure', 'Requirements' (highlighted), 'Procurement', 'Attachments', 'Evaluation Team', and 'Criteria'. The main content area contains buttons for 'Validate PR', 'Create Solicitation', 'Printable PR', and '1102 Sandbox', along with 'Printable PR Pricing'. Below these is the 'Purchase Request Number: N00024-04-NR-00190'. A list of links is displayed, including 'Comments', 'Section C Statement of Work', 'Section D Packaging and Marking', 'Reports', 'Award Term Clause', 'Award Term Plan', and 'Proposal Requirements and Evaluation Criteria'.

Figure 49: PR - Requirements List

Table 17: PR Requirements Detail - Fields

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells.
Commercial/Special	Radio	Choose Commercial or Special. Only available in Section D Packaging and Marking.

Table 18: PR Requirements Detail - Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window.
Cancel	Closes the window without saving changes.
View Templates	Represented by the icon  . Opens a pop up window that contains all templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.

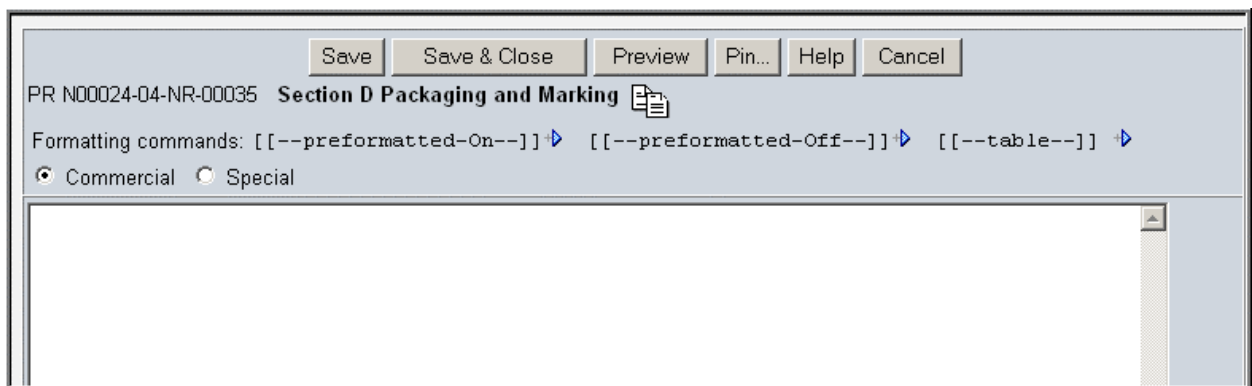


Figure 50: PR - Requirements Detail


2.2.6 Add Procurement data

The Procurement Panel is the area of the PR section in which information specific to this acquisition is collected. Most of the information on this screen is automatically populated with the information that was collected during the Wizard, such as the Evaluation Criteria and Type of Procurement. Users must enter the Requested Award Date, the Acquisition Plan Number, Period of Performance dates, a Security Classification, and Award Term Consideration.

All of the fields on this panel are either drop-down boxes or blank text boxes in which text should be manually entered or cut and pasted. If you elect to incorporate award term incentives, the Award Term Clause and Plan are automatically populated with language that is common to similar service contracts with Award Terms. Since it is a text box, users can manually edit the clause and plan to customize for specific acquisitions.

Table 19: PR Procurement Panel - Fields

Field	Type	Description
Requested Award Date	Dropdown	Enter the Requested Award Date using the dropdown lists.
Acquisition Plan No. (If not applicable, enter N/A)	Text	Enter the Acquisition Plan No. Not required.
Period of Performance	Dropdown	Enter the From and To dates of the Period of Performance using the dropdown lists.
Type of Procurement		
Competitive/Sole Source	Radio	Choose Competitive or Sole Source
If Sole Source	Dropdown	If Sole Source was chosen above, select the MAC Contractor from the list.
Exception	Dropdown	<p>All MAC holders will be given a Fair Opportunity To Compete (FOTC) for prospective task orders, unless one of four exceptions to the FOTC can be met. Both the contracting officer and the ombudsman will review and approve the validity of the use of an exception to FOTC.</p> <p>The four exceptions to the requirement to provide all MAC holders a fair opportunity to compete for an order are:</p> <ul style="list-style-type: none"> ■ Logical follow-on to an order already issued under the MAC ■ Agency need is so urgent that providing a fair opportunity to compete would result in unacceptable delays ■ Requirements are unique or so highly specialized that only one awardee is capable of meeting it ■ It is necessary to place the order to meet the minimum quantity. <p>Select Urgency, Only One Capable, Logical Follow-on, or Minimum Guarantee.</p>

Field	Type	Description
Justification Template		Select the View Templates icon to open the Sole-Source Justification Templates window. Choose a template to paste into the Justification field below.
Justification	Text Box	The program office must justify the sole source rationale in the SeaPort PR. For examples to see who approves this information see SSAPO website.
Prior Task Order No.	Read Only	This field is populated by the system, if applicable.
Prior Solicitation Document No.	Read Only	This field is populated by the system, if applicable.
Purchase Request No.	Read Only	This field is populated by the system.
Evaluation Criteria		
Evaluation Strategy	Radio	The program manger needs to determine if the competition will be evaluated on a best value to the Government basis or on the low cost/technically acceptable basis. If best value is to be used, the importance of the factors (technical, past performance, and price) must be determined. The order of importance of factors is based upon what is in the best interest of the program. These areas should correspond with and relate to the specific requirements set forth in the Statement of Work. Choose Best Value of Low Cost.
Technical	Dropdown	For Best Value, select importance of the Technical evaluation criteria. Choose First, Second, Third, or Even.
Past Performance	Dropdown	For Best Value, select importance of the Past Performance evaluation criteria. Choose First, Second, Third, or Even.
Price	Dropdown	For Best Value, select importance of the Price evaluation criteria. Choose First, Second, Third, or Even.
Security Classification	Radio	Whether elements of Task Order involve the need to access classified documents, see the SSAPO website for procedures. Choose Unclassified or Classified.
Reverse Auction	Radio	Choose Yes or No.
Award Term Consideration	Radio	Award Term clauses provide a mechanism for the Government to allow contractors to earn additional options to extend the term of the contract through exceptional performance. For additional information on award term contracts see SSAPO website. Choose Yes or No. Note: If Yes, enter the clause and plan on the Requirements page.

User: Test PCO
home help log off

New Purchase Request
Document Library
Task Order
Reports
System Admin
My Profile

The Helm
Package
Purchase Req.
Small Business

Administrative
Save
Validate PR
Create Solicitation
Printable PR

Pricing Structure
1102 Sandbox
Printable PR Pricing

Requirements

Procurement
Purchase Request Number: N00024-04-NR-00190

Attachments

Evaluation Team



Criteria

Requested Award Date	April 25 2004
Acquisition Plan No. (if not applicable, enter N/A)	AP SSAPO 00-001
Period of Performance	From April 25 2004 To April 25 2009
Type of Procurement	<input checked="" type="radio"/> Competitive <input type="radio"/> Sole Source
	If Sole Source, select MAC Contractor Select
	Exception Select
	Justification
	<div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div>
Prior Task Order No.	
Prior Solicitation Document No.	
Purchase Request No.	N00024-04-NR-00190
Evaluation Criteria	Evaluation Strategy <input checked="" type="radio"/> Best Value <input type="radio"/> Low Cost
	For Best Value, select importance of the following evaluation criteria
	Technical Second
	Past Performance Third
	Price First
Security Classification	<input checked="" type="radio"/> Unclassified <input type="radio"/> Classified
Reverse Auction	<input type="radio"/> Yes <input checked="" type="radio"/> No
Award Terms	
Award Term Consideration	<input checked="" type="radio"/> Yes <input type="radio"/> No (if award terms, enter the clause and plan on the Requirements page.)

Figure 51: PR - Procurement

2.2.7 Add Attachments data

Users are able to attach any electronic files to the PR that may apply. For example, drawings, specifications, organizational structures, or background information may all be attached at the Attachments Panel. To add a new attachment, the user should select the *New* button. By selecting *browse* on the following screen, the user is able to browse through their files, either locally, a network, or on desk, using a browser. Upon finding the file you wish to attach, double

click on the file or click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. The *Save* button returns the user to the main Attachment screen. Under the Actions column, the user can click the pen icon  (to edit the Purpose text) or the trashcan icon  (to delete an attachment).



NOTE: If you want to update an attachment that has already been added, you will need to delete the original and then upload the newer version of the file.

The Attachments panel is used to add attachments to the Purchase Order. It contains the following data fields and buttons.

Table 20: PR Attachments Panel - Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You will be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved.

Table 21: PR Attachments Panel - Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.
Edit	Represented by the icon  , the attachment's Purpose text can be edited.
Delete	Represented by the icon  , the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer for a file.

The screenshot shows the SeaPort-e interface for a Purchase Request. The user is 'Test PCO'. The navigation menu includes 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The main content area is titled 'The Helm' and includes buttons for 'Validate PR', 'Printable PR', '1102 Sandbox', and 'Printable PR Pricing'. The Purchase Request Number is 'N00024-04-NR-00190'. There are 'Delete All' and 'New' buttons. A sidebar on the left lists menu items: Administrative, Pricing Structure, Requirements, Procurement, Attachments (highlighted), Evaluation Team, and Criteria. Below the main content, it states 'Purchase Request contains no Attachments.'

Figure 52: PR - Attachments - No Attachments

The screenshot shows the SeaPort-e interface for a Purchase Request with attachments. The user is 'Test PCO'. The navigation menu is the same as in Figure 52. The main content area is titled 'The Helm' and includes buttons for 'Validate PR', 'Printable PR', '1102 Sandbox', and 'Printable PR Pricing'. The Purchase Request Number is 'N00024-04-NR-00263'. There are 'Delete All' and 'New' buttons. A table below shows the attachments:

File Name	Purpose	Actions
SampleFile1.doc	Procurement Plan - Phase 1	
SampleFile2.doc	Milestone Timeline	
SampleFile3.doc	Site Diagram	

The sidebar on the left is the same as in Figure 52, with 'Attachments' highlighted.

Figure 53: PR - Attachments - With Attachments

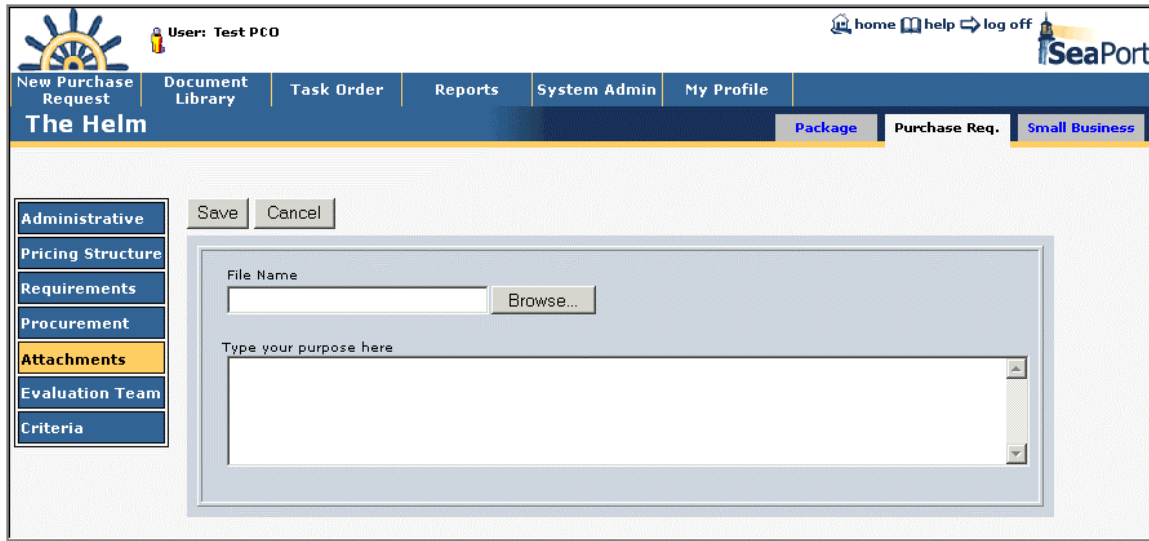


Figure 54: PR - Attachments - Add Attachment

2.2.8 Add Evaluation Team data

Evaluator data can be added using the User Search feature. The User Search appears in a separate window as shown in Figure 56.

Only the Originator of a purchase request (PR), Purchase Request or Solicitation Document (SD) editor, or the PCO can assign, remove, or change the chairman as well as assign or remove members of the evaluation committee.

The Originator and PR editor perform their functions from the PR document screen; the PCO and SD editor perform these actions from the Solicitation document screen. Regardless of the screen set used, to get started click the *Evaluation Team* button found in the left-side navigation area and follow these procedures:

Table 22: PR Evaluation Team Panel - Fields

Field	Type	Description
Evaluation Chairman	User Search	Use the User Search feature to add the Evaluation Chairman name. Only one evaluation chairman can be assigned to an evaluation committee. The document originator or the PCO can assign the chairman. If it is desired that a Chairman submit his individual evaluation beside the summary evaluation, the chairman needs to be chosen as an evaluator as well.

Field	Type	Description
Evaluator	User Search	<p>Evaluators are those individuals who will evaluate the proposals once they are received. They should have expertise in one of the evaluated areas such as technical requirement or past performance. Use the User Search feature to add Evaluators.</p> <p>A registered evaluator is a person who already has a SeaPort account (i.e., a user id and password). There is no limit to the number of evaluators that can be assigned to an evaluation committee. When making workload assignments, an evaluator can be assigned to rate any or all of the following evaluation categories:</p> <ul style="list-style-type: none"> ■ Technical ■ Past Performance ■ Cost
Non-registered users	Text Box	A non-registered evaluator is a person who does not already have a SeaPort account. Manually enter the name of any evaluators that do not have SeaPort accounts. A text box is provided to record the name and assignments of those individuals. It is then up to the chairman or the PCO to notify those individuals to register. Non-registered evaluators must be given a SeaPort account before they can access the evaluation system.
Technical Evaluator	Checkbox	<p>Choose this checkbox to designate this person as a Technical Evaluator.</p> <p>Note: Only a Cost Evaluator will see cost information.</p>
Past Performance Evaluator	Checkbox	<p>Choose this checkbox to designate this person as a Past Performance Evaluator.</p> <p>Note: Only a Cost Evaluator will see cost information.</p>
Cost Evaluator	Checkbox	<p>Choose this checkbox to designate this person as a Cost Evaluator.</p> <p>Note: Only a Cost Evaluator will see cost information.</p>

Table 23: PR Evaluation Team Panel - Buttons

Button	Description
Find Chairman	Activate the User Search feature.
Find Evaluator	Activate the User Search feature.
Save	Save the list of Non-registered users.
Delete	Delete the evaluator from the list.

User: Test PCO
home help log off

New Purchase Request
Document Library
Task Order
Reports
System Admin
My Profile

The Helm

Package
Purchase Req.
Small Business

Administrative
 Pricing Structure
 Requirements
 Procurement
 Attachments
Evaluation Team
 Criteria

Create Solicitation
Printable PR
1102 Sandbox
Printable PR Pricing

Purchase Request Number: N00024-04-NR-00190

Evaluation Chairman Name	Activity	Actions
Test_Approver	NAVSEA	

Evaluation Chairman

Chairman: Find Chairman..

Evaluator Name	Activity	Technical Evaluator	Past Performance Evaluator	Cost Evaluator	Actions
testevaluator1	NAVSEA	✓	✓	✓	
testevaluator2	NAVSEA	✓	✓	✓	

Evaluator

Evaluator: Find Evaluator..

Non-registered Users

List all non-registered users: Save

Figure 55: PR - Evaluation Team

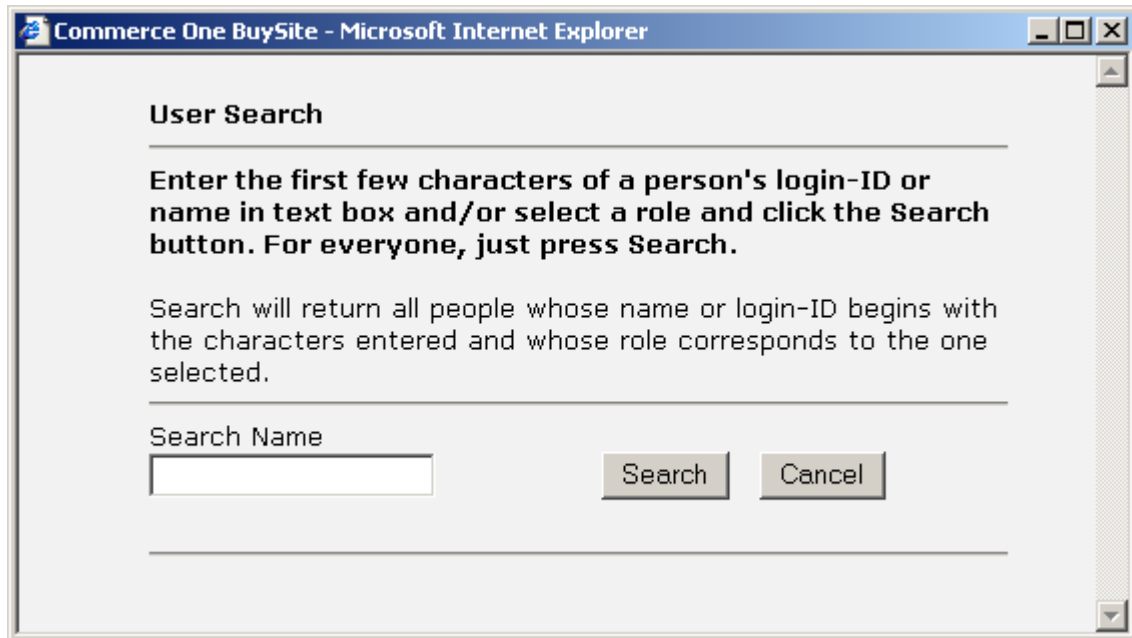


Figure 56: PR - User Search

2.2.9 Add Criteria data

Criteria data is information that relates to the submission and review of proposals.

Table 24: PR Criteria Panel - Fields

Field	Type	Description
Previous Contract Work	Radio	Was work done under a previous contract number? Choose Yes, No, or Don't Know.
Contractor currently performing the work	Text Box	The name of the contractor currently performing work on this contract, if applicable.
Contract Number	Text Box	The previous contract number, if applicable.
Contract Amount	Text Box	The previous contract amount, if applicable.

Field	Type	Description
Steps	Radio	<p>Will this be a one step or a 2 step process? Choose 1 Step, 2 Step or Don't Know.</p> <p>One Step Process Under a one step source selection process, bidders submit their proposals based on the solicitation. The proposals are evaluated and award is made.</p> <p>Two Step Process Under the first step of a two step source selection process, interested offerors are asked to submit a one or two page approach summarizing their technical experience and their past performance, as well as a "not-to exceed" (NTE) price. The submittals are evaluated and the top offerors are asked to participate in the second step of the process. The offerors that have been selected to submit proposals for the second step will explain in greater detail the ideas that they submitted in the first step. The SeaPort office can help the program manager decide whether a two step source selection process is appropriate.</p>
Resume	Radio	You can choose whether or not to receive resumes from those individuals who would be performing the service. Will resumes be required as part of the award determination process? Choose Yes, No, or Don't Know.
Oral Presentation	Radio	If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose to receive written overviews to review. Will oral presentations be required as part of the award determination process? Choose Yes, No, or Don't Know.
Maximum # of Pages Requested for Technical Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their technical approach. Enter the maximum number of pages requested for the Technical Approach document, if applicable.
Maximum # of Pages Requested for Management Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their management approach. Enter the maximum number of pages requested for the Management Approach document, if applicable.
Maximum # of Pages Requested for Past Performance	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their experience statement. Enter the maximum number of pages requested for the Past Performance document, if applicable.

The screenshot shows the 'Criteria' section of the SeaPort system. At the top, there is a navigation bar with 'The Helm' and tabs for 'Package', 'Purchase Req.', and 'Small Business'. Below this, there are buttons for 'Save', 'Validate PR', 'Create Solicitation', and 'Printable PR'. A sidebar on the left lists menu items: Administrative, Pricing Structure, Requirements, Procurement, Attachments, Evaluation Team, and Criteria (highlighted). The main content area shows a 'Purchase Request Number: N00024-04-NR-00190' and a form with the following fields:

- Previous Contract Work: Yes No Don't know
- Contractor currently performing the work: [Dropdown menu]
- Contract Number: [Text input]
- Contract Amount: [Text input with '0']
- Steps: 1 Step 2 Step Don't know
- Resume: Yes No Don't know
- Oral Presentation: Yes No Don't know
- Maximum # of Pages Requested for Technical Approach: [Text input]
- Maximum # of Pages Requested for Management Approach: [Text input]
- Maximum # of Pages Requested for Past Performance: [Text input]

Figure 57: PR – Criteria

A PCO can create a draft solicitation by pressing the *Create Solicitation* button.

Once pressed, the system runs a validation routine to ensure that the draft PR has all required fields populated. If true, the system will successfully validate and create the draft solicitation. If the validation fails, the system reports the errors requiring attention via a message box.

Upon successful validation the system generates a draft solicitation, provides a unique solicitation number, and populates most of the solicitation fields with the data from the PR.

2.2.10 Small Business Set Aside

Small Business Set Aside is required in order to create a Solicitation. Use the Small Business tab at the top of the screen to access this panel. Choose a PCO Set Aside Selection and enter a Justification if necessary. Save the Selection or Save and Invite the DSB (Deputy for Small Business) by choosing the appropriate button. The DSB will make the DSB Set Aside Selection.

Table 25: PR Small Business Set Aside Panel - Fields

Field	Type	Description
PCO Set Aside Selection	Radio	Choose Full Set Aside, Cascade, or No. If No is selected, a Justification is required.

Field	Type	Description
Justification	Text Box	Enter the justification for selecting No. Required if No is selected.

Table 26: PR Small Business Set Aside Panel - Buttons

Button	Description
Save Selection	Save changes to the database.
Save and Invite DSB	Save changes and also invite the DSB to make Set Aside selections.

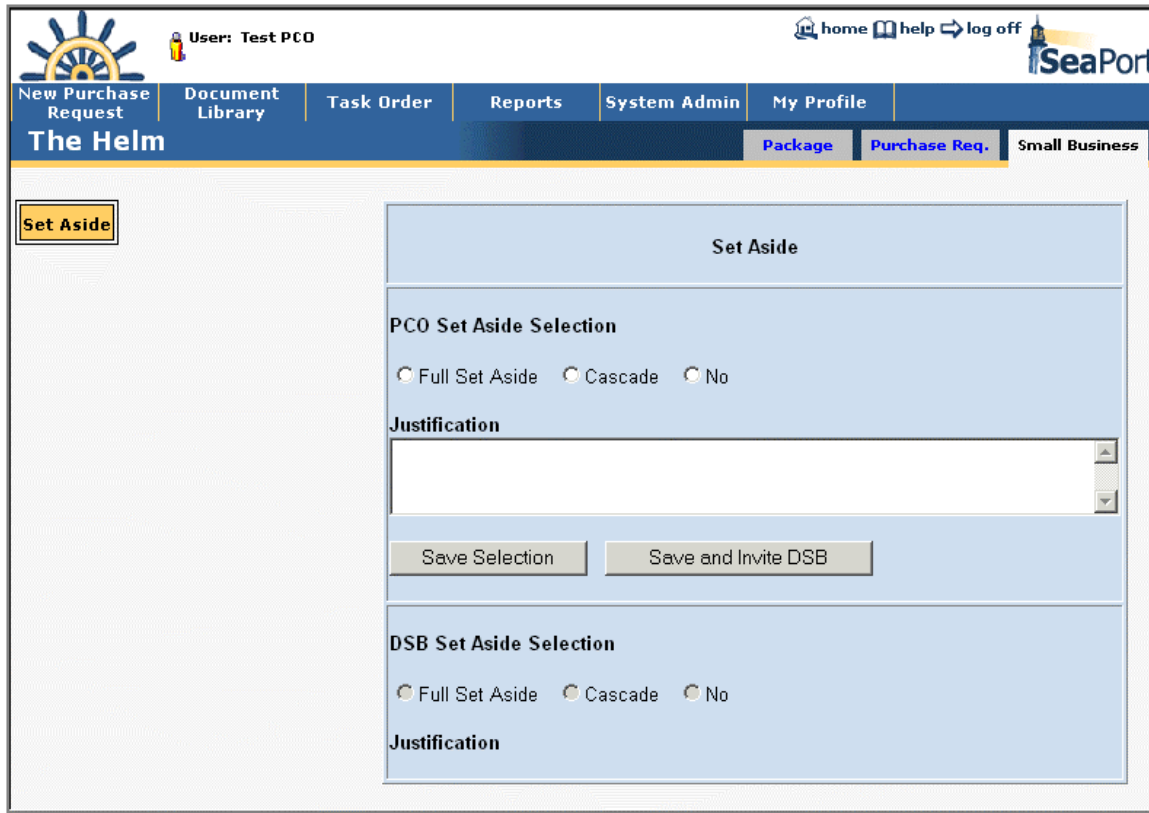


Figure 58: Small Business – Set Aside

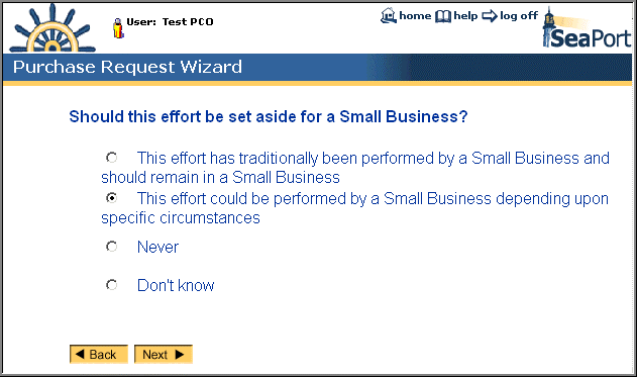
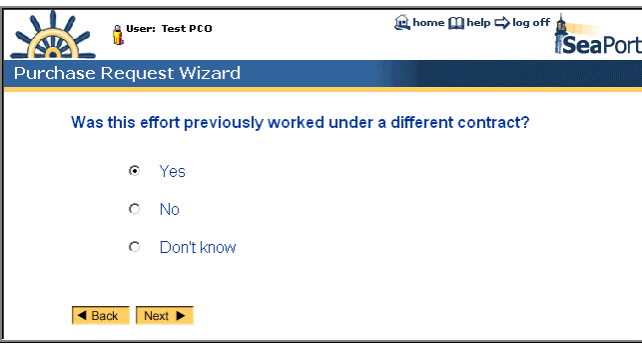
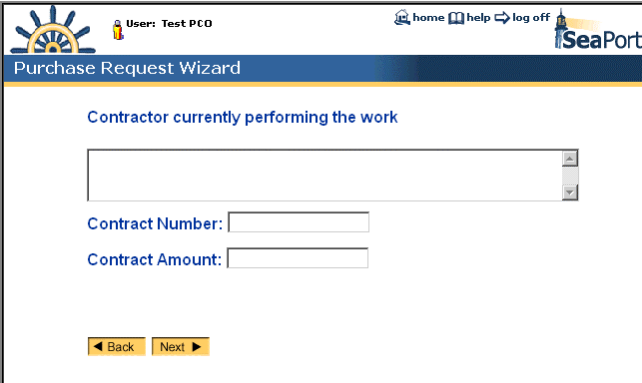
2.3 Practice

Students will complete steps one and two of the procurement process described in Section 2.1.2 of the SeaPort II Training Plan. This involves creating a draft Purchase Request (PR) by using the New PR Wizard and routing the draft PR to a PCO or 1102. Students will create a Purchase Request using the sample data found in the tables below. Students will then clone the Purchase Request that is created in the first exercise.

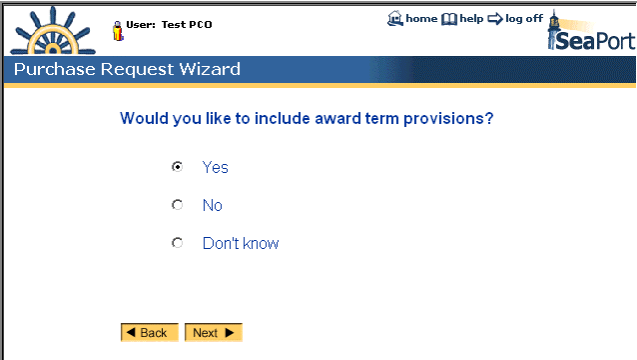
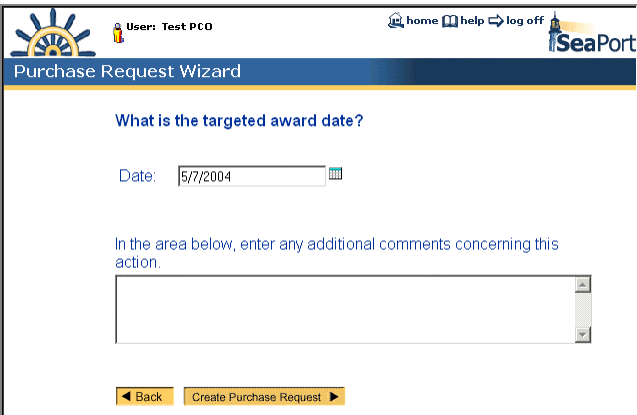

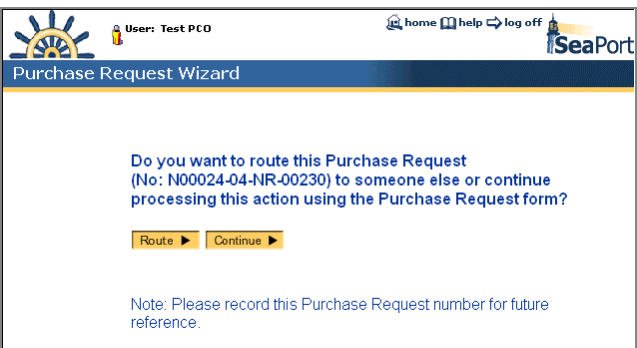
Setup: Create three sample files for use in uploading attachments. Label these files: SampleFile1, SampleFile2, and SampleFile3. These can be any type of file.

Table 27: Purchase Request Data – PR Wizard

Page	Data
	<p><u>Practice PR</u> Choose No.</p>
	<p><u>Type of Effort</u> Choose Engineering, Technical and Programmatic Support Services (Seaport Enhanced).</p>
	<p><u>Select Zone</u> Choose any Zone.</p>

Page	Data
 <p>The screenshot shows a web form titled "Purchase Request Wizard" with the question "Should this effort be set aside for a Small Business?". There are four radio button options: "This effort has traditionally been performed by a Small Business and should remain in a Small Business", "This effort could be performed by a Small Business depending upon specific circumstances" (which is selected), "Never", and "Don't know". Navigation buttons for "Back" and "Next" are at the bottom.</p>	<p>Small Business Set Aside Choose "This effort could be performed by a Small Business depending upon specific circumstances".</p>
 <p>The screenshot shows a web form titled "Purchase Request Wizard" with the question "What services are you buying?". It includes a "Short Description" text box, a note: "For both Total Duration and Total Dollar Value, include your firm requirement to be awarded plus all standard and award term options.", a "Total Duration (in years):" text box, and an "Estimated Total Dollar Value: \$" text box. A note at the bottom says: "Note: Enter whole numbers only and do not include commas or a decimal point in your total dollar estimate." Navigation buttons for "Back" and "Next" are at the bottom.</p>	<p>Description of Services Enter a Short Description, Duration, and Estimated Total Dollar Value.</p>
 <p>The screenshot shows a web form titled "Purchase Request Wizard" with the question "Was this effort previously worked under a different contract?". There are three radio button options: "Yes" (which is selected), "No", and "Don't know". Navigation buttons for "Back" and "Next" are at the bottom.</p>	<p>Previous Contract Choose Yes.</p>
 <p>The screenshot shows a web form titled "Purchase Request Wizard" with the question "Contractor currently performing the work". It includes a dropdown menu for the contractor name, a "Contract Number:" text box, and a "Contract Amount:" text box. Navigation buttons for "Back" and "Next" are at the bottom.</p>	<p>Previous Contract Information Enter a Contractor name and address in the text box. Enter a contract number and a numerical contract amount.</p>

Page	Data
	<p><u>Competitive or Sole Source</u> Choose Competitive.</p>
	<p><u>Best Value or Low Cost</u> Choose Best Value.</p>
	<p><u>Relative Importance</u> Choose a relative importance for each of the Criteria listed.</p>
	<p><u>Proposal Requirements</u> Select any choice for Steps, Resumes, and Oral Presentation. Enter text into the Proposal Criteria and Evaluation Criteria text box. Enter a number of pages less than 10000 into each of the maximum number text boxes.</p>

Page	Data
	<p><u>Award Term Provisions</u> Choose Yes.</p>
	<p><u>Award Date</u> Use the calendar control icon  to select a Date. Enter text into the additional comments text box.</p>
	<p><u>Continue Processing</u> Choose Route.</p>

Page	Data
	<p>Route Sheet</p> <p>Enter a suggested route (i.e. user1, user2, user3) and click the <i>Save Suggested Route</i> button.</p> <p>Click the Find User button and use the User Search feature to select yourself (your login).</p> <p>Enter text into the routing comment text box.</p> <p>Click the <i>Return to Form</i> button.</p> <p>You are now presented with the Purchase Request Admin Panel. Enter the data described below.</p>

After completing the New PR Wizard, you will be at the Administrative panel of the new PR. Enter (or edit) the data shown in the table below.

Table 28: Purchase Request Data - Administrative

Field	Data
Originator	This field is pre-filled by the system based on the user login. Use the User Information icon to see the information for this user. Use the Change Originator icon to activate the User Search feature, but do not change the Originator.
Program Office	Enter the name of any program office here.
Originator's Office	This field is filled based on the Originator information.
Date of Origination	This field is filled.
Code	This field is filled based on the Originator information.
Activity	Choose an Activity from the dropdown list.
Requisition	Enter a number here or "N/A".
Name	Select a TOM from the dropdown list. Click the icon to see a list of all TOMS. Select a different TOM from the list.
POC	Enter text in this text box (i.e. name, phone number).
Zone of Performance	Select a Zone from the dropdown list. Click the Zone Map icon to see the pop up Zone Map.
Set Aside	Select any choice.



Use the left navigation to select the Pricing Structure panel. Enter the information in the table below. Use the *New CLIN* button to enter the CLIN information. Use the Add SLIN icon  to enter SLIN information or the Edit icon  to edit the information for an existing SLIN.



Table 29: Purchase Request Data - Pricing Structure

Field	Data
Total Duration (in years)	Enter a number between one and five.
Guaranteed Savings	Select either choice.
Estimated Total Cost	Enter a number.
Non-conversion Justification	Enter text in the text box if you selected No for Guaranteed Savings.
New CLIN Window	
CLIN ID	Select a 001 from the dropdown list.
Short Description	Enter text in the Short Description textbox. Save.
New SLIN Window	
SLIN ID	Enter a two-letter SLIN ID (i.e. AA, AB, BA, etc).
Fund Type	Select a Fund Type from the dropdown list.
FMS Case Number	Enter an FMS case number (format: AA-A-AAA)
Firm or Option	Select either Firm or Option.
Fee Type	Select a Fee Type form the dropdown list.
Unit of Issue	Select a Unit of Issue from the dropdown list.
Fiscal Year	Select a Fiscal year from the dropdown list.
Cost Plus Fee	Enter a number in the textbox.
Quantity	Enter a number in the textbox.
Recurring Cost	Select either choice.
Performance Based	Select either choice.
Service Contract Act Applicable	Select either choice.
Period of Performance	Use the dropdown list controls to enter a From and To date.
Short Description	Enter text in the Short Description textbox. Save.

Use the left navigation to proceed to the Requirements panel. Enter the information in the table below. Click the Requirement's link to enter text for a Requirement.


Table 30: Purchase Request Data - Requirements

Field	Data
Comments	From the pop up window, enter text in the text box.
Section C Statement of Work	From the pop up window, enter text in the text box.

Field	Data
Section D Packaging and Marking	Select either Commercial or Special. Click the View Templates icon  . Choose a template from the dropdown list. Click the Go button. Click the <i>Copy to Requirements Page</i> button that appears. Click the <i>Close</i> button. Click <i>Save & Close</i> in the Requirements window.
Reports	Click the View Templates icon  . Choose a template from the dropdown list. Click the Go button. Click the <i>Copy to Requirements Page</i> button that appears. Click the Close button. Click the <i>Preview</i> button. Click the <i>Close</i> button to close the preview window. Click <i>Save & Close</i> in the Requirements window.
Award Term Clause	Preview the Award Term Clause.
Award Term Plan	Preview the Award Term Plan.
Proposal Requirements and Evaluation Criteria	From the pop up window, enter text in the text box.



Use the left navigation to proceed to the Procurement panel. Enter the information in the table below.

Table 31: Purchase Request Data - Procurement

Field	Data
Requested Award Date	Use the dropdown list controls to enter a date.
Acquisition Plan No. (If not applicable, enter N/A)	The system will fill this text box.
Period of Performance	Use the dropdown list controls to enter a From and To date.
Type of Procurement	Choose either Competitive or Sole Source. If you choose Sole Source, select a MAC contractor and Exception from the dropdown lists. Enter a Justification using the template by clicking on the View Templates icon  . Choose a template from the dropdown list. Click the Go button. Click the <i>Copy To Requirements Page</i> button that appears. Click the <i>Close</i> button. Edit the text that appears in the Justification text box.
Evaluation Criteria	Select either Best Value or Low Cost. If you choose Best Value, use the dropdown lists to make a selection for Technical, Past Performance, and Price.
Security Classification	Select either choice.
Reverse Auction	Choose Yes.
Award Term Consideration	Choose Yes.

Use the left navigation to proceed to the Attachments panel. Enter the information in the table below.

Table 32: Purchase Request Data - Attachments

Field	Data
Attachment 1	Click the <i>New</i> button. Browse to the SampleFile1 and select it. Enter text into the Purpose text box.
Attachment 2	Click the <i>New</i> button. Browse to the SampleFile2 and select it. Enter text into the Purpose text box. Click the Edit icon  for Attachment 1 and change the Purpose text. Save the changes.
Attachment 3	Click the <i>New</i> button. Browse to the SampleFile3 and select it. Enter text into the Purpose text box. Click the Delete icon  to delete Attachment 2.

Use the left navigation to proceed to the Evaluation Team panel. Enter the information in the table below.

Table 33: Purchase Request Data - Evaluation Team

Field	Data
Evaluation Chairman	Click the <i>Find Chairman</i> button and select a Chairman using the User Search feature.
Evaluator	Click the <i>Find Evaluator</i> button and select an Evaluator using the User Search feature.
Non-registered users	Enter text into the Non-registered users textbox. Save.

Use the left navigation to proceed to the Criteria panel. Enter the information in the table below.

Table 34: Purchase Request Data - Criteria

Field	Data
Previous Contract Work	Select any choice.
Contractor currently performing the work	Enter any contractor's name into the Contractor currently performing the work textbox.
Contract Number	Enter a contract number.
Contract Amount	Enter a numerical contract amount.
Steps	Select any choice.
Resume	Select any choice.
Oral Presentation	Select any choice.

Field	Data
Maximum # of Pages Requested for Technical Approach	Enter a number of pages less than 10000 into the Technical Approach text box.
Maximum # of Pages Requested for Management Approach	Enter a number of pages less than 10000 into the Management Approach text box.
Maximum # of Pages Requested for Past Performance	Enter a number of pages less than 10000 into the Past Performance text box.

Validate PR

You have completed entering information for the Purchase Request. Use the Validate PR button to check your work. If validation is not successful, enter the missing information and validate again. Continue to validate the PR until you are successful.

Create Solicitation

Click the Create Solicitation button. The Draft Solicitation is created. You are now at the Administrative panel for the draft Solicitation. Notice that the tab navigation at the top of the page has changed to indicate this. You will use this draft solicitation to complete the practice exercises in Section 3.3 below.

2.4 Adjust

The instructor will evaluate the students' progress through the exercises above. Areas of particular difficulty will be reviewed and addressed as necessary.

3 Solicitation Document

This section details the Solicitation Document training session. The Solicitation Document training session follows the structure outlined in the SeaPort II Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

3.1 Explain

The Solicitation Document organizes the Purchase Request (PR) data into a solicitation format. After the Originator routes a PR to a SEA 02 contracting officer for processing, they will be able to view but no longer be able to manipulate any of the information. These functions transfer to SEA 02.

Once the Solicitation Document is complete, the PCO will "Lock & Release" the solicitation. SeaPort archives and posts this document as the official solicitation of record and permits no further changes. SeaPort notifies all MAC holders that the solicitation has been posted.

Any changes to a released solicitation require issuance of a Solicitation Amendment.

The purpose of the Solicitation Document panels is to consolidate information entered in the Purchase Request with contractual information that will eventually be sent out to the Contractors for bidding. Use the left navigation buttons to access all the related Solicitation Document panels.

3.2 Demonstrate

During the draft solicitation state, the PCO/1102 is required to populate several fields not entered during the PR stage. The following sections describe the solicitation panels and individual fields.

3.2.1 Add Administrative data

The Administrative panel is used to enter Administrative data. It contains the following data fields and buttons.

Table 35: SD Administrative Panel - Fields

Field	Type	Description
PR No.	Read Only	Automatically entered by SeaPort
Sol. No.	Read Only	Automatically entered by SeaPort
Amendment No.	Read Only	Automatically entered by SeaPort
Date Issued	Dropdown	Enter the Date Issued using the dropdown lists.
Closing Date	Dropdown	Enter the Closing Date using the dropdown lists.
Closing Time	Text Box	Use HHMM format. All times should be entered using military time based upon your local time. If a closing date is entered, a closing time is required.
Requesting Office		
Organization	Dropdown	Select an organization from the dropdown list.




Field	Type	Description
Program Office	Text Box	Enter the name of the Program Office.
Issuing Contracts Office		
Contract Negotiator	Dropdown	Select a Contract Negotiator from the dropdown list.
View All		View a list of all Negotiators in the system. This list opens in a pop-up window.
User Information		View the SeaPort Profile of the selected user.
Zone of Performance	Dropdown	Choose a zone of performance from the dropdown list. Zones can be displayed by selecting the map icon.
Display Zone Map		Displays a geographical color-coded zone map in a pop up window.
Set Aside	Radio	<p>Set Aside will be the attribute of the package and can be changed through the Purchase Request/Solicitation stages of the package until the Solicitation is released.</p> <p>The Solicitation Document validation process will ensure the valid selection before the Solicitation release.</p> <p>Choose Full Set Aside, Cascade, or No.</p> <p>If user selects "Full Set Aside", Section M will be automatically populated with Complete Set Aside clause.</p> <p>If user selects "Cascade", Section M will be automatically populated with Cascading Set Aside clause.</p> <p>If user selects "No", no Set Aside provisions are automatically inserted in to Section M.</p> <p>Note: The system will not automatically update Section M to remove the Set Aside clause if user deselects Set Aside option after selecting it previously.</p>

Table 36: SD Administrative Panel - Buttons

Button	Description
Save	Pressing this button updates information in the database. If the Save button is not pressed before leaving this screen, any newly entered information will be lost.
Validate Sol	Pressing this button ensures that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition. This notification is in the form of a message window indicating the missing fields.
Lock & Release Solicitation	Pressing this button will create a final version of the Adobe PDF file with the word "Final" appearing at the top of each page and lock/protect all Solicitation Document fields from further update. Press this button when the document is complete and ready to opened up for bidding.
1102 Sandbox	Pressing this button opens a new browser window containing a form that can be used to store temporary 1102 information.
Printable SD Pricing	Pressing this button opens a new browser window containing a printable version of the Purchase Request's pricing structure.

NOTE: The Save, Validate Sol, Lock & Release Solicitation, 1102 Sandbox, and Printable SD Pricing buttons are common to several of the SD panels. They always perform the same function.

The screenshot shows the 'The Helm' interface with the user 'Test PCO'. The 'Administrative' panel is active, displaying various fields for a Solicitation Document (SD) with ID N00024-04-R-7175. The interface includes a navigation menu on the left and a top navigation bar with options like 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', 'My Profile', 'Package', 'Small Business', 'Financial', and 'Solicitation Doc.'. The Administrative panel contains buttons for 'Save', 'Validate Sol', 'Lock & Release Solicitation', '1102 Sandbox', and 'Printable SD Pricing'. Below these are fields for PR No., Sol. No., Amendment No., Date Issued, Closing Date, and Closing Time. It also includes sections for 'Requesting Office' (Organization: NAVSEA 02, Program Office: Office2), 'Issuing Contracts Office' (Contract Negotiator: Test PCO), 'Zone of Performance' (National Capital Zone), and 'Set Aside' options (Full Set Aside, Cascade, No).

Figure 59: SD - Administrative

3.2.2 Add Pricing Structure data



The purpose of the Pricing Structure Panel is to lay out the Contract Line Item Number (CLIN) structure of the Task Order. The basic MAC contracts have within them a uniform CLIN

structure based upon contract type. The Solicitation Document Pricing Structure panel replicates this structure. Information such as Total Duration and Estimated Total Cost will be provided by the Wizard. It contains the following data fields and buttons.

Table 37: SD Pricing Structure Panel - Fields

Field	Type	Description
Guaranteed Savings	Radio	Choose Yes or No.
Non-conversion Justification	Text Box	Enter the Justification for not structuring your Task Order to be cost type in the base period and fixed price for option periods.
New CLIN Window		
CLIN ID	Dropdown	Choose from 0001 - 0009. Each CLIN ID corresponds to a specific cost type and period of performance. See table in Figure 61.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
New SLIN Window		
SLIN ID #	Text Box	Enter a valid 2-letter combination.
Fund Type	Dropdown	Choose from the list. See table in Figure 43.
FMS Case Number	Text Box	If FMS funding is used, specify the case. Enter the case number in the format AA-A-AAA.
Firm or Option	Dropdown	Enter whether this requirement will be placed at time of award or if it is a future requirement. Choose Firm or Option.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Unit of Issue	Dropdown	Choose Labor Hours, Lot, or Labor Years.
Fiscal Year	Dropdown	Enter the fiscal year of the money being used. Choose the last 2 digits of the fiscal year from the list.
Cost Plus Fee	Text Box	Originator should enter their best estimate. This is for planning purposes only, but all fields must contain a value. Enter the dollar amount. (14 digit limit)
Quantity	Text Box	If level of effort, your estimate of the number of man-hours required. If completion, enter the numeral 1; unit of issue is "Lot". Enter the quantity. (9 digit limit)
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Unit Price	Read Only	This field is calculated based on other data.
Period of Performance	Dropdown	Enter when performance starts and when performance ends. Choose From and To dates using the dropdown lists.
Short Description	Text Box	Enter a very short description (e.g., Logistics Support for SEA 02) that will appear in Section B of the Task Order. Enter up to 1000 characters.

Table 38: SD Pricing Structure Panel – Buttons

Button	Description
New CLIN	<p>Click the <i>New CLIN</i> button to add a contract line item number (CLIN). You must also enter a short description for the CLIN. After saving the CLIN, you can then add its associated SLINs.</p> <p>When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.</p>
Timeline...	Opens the Timeline window described below.
Expand CLINs	Allows the user to see all SLINS associated with a CLIN. CLINS are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).
Actions	Choose the pen icon  to edit, the trashcan icon  to delete, or the disk icon to save.

The screenshot shows the 'Pricing Structure' section of the SeaPort system. The user is logged in as 'Test PCO'. The interface includes a navigation menu with options like 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Pricing Structure' tab is active, showing buttons for 'Save', 'Validate Sol', 'Lock & Release Solicitation', and '1102 Sandbox'. Below these are buttons for 'Printable SD Pricing' and 'Solicitation Document Number: N00024-04-R-7175'. A form section includes 'Guaranteed Savings' with radio buttons for 'Yes' and 'No', and a 'Non-conversion Justification' text area. The 'CLIN' section has buttons for 'New CLIN', 'CLIN/SLIN Wizard', and 'Timeline...'. Below this are checkboxes for CLIN numbers 0001, 0002, 0003, 0005, and 0006, along with an 'Expand CLINs' button. A table displays the following data:

ID	F or O	Fund Type	FY	Rec	Qty	Dollar Value	Short Description	Actions
0001 Cost Type						201,234		
0001AA	Firm	FMS	04	Y	1 Labor Hours	1,234	testing	
0001AB	Firm	OTHER	04	Y	200 Labor Hours	200,000	Sample Description	
0002 Firm Fixed Price						1,200,000		
0002AA	Firm	OPN	05	Y	500 Labor Hours	500,000	Description	
0002BA	Option	OPN	06	Y	1	500,000	Description	

Figure 60: SD - Pricing Structure

3.2.2.1 New CLIN

Selecting the *New CLIN* button will open the following window as a pop up. After selecting New CLIN the user must select from the drop down list the appropriate CLIN number that they wish to procure with and provide a short description of the new CLIN. The basic MAC contracts have within them a uniform CLIN structure based upon contract type. After clicking *Save*, the CLIN is added and the user is returned to the main panel.

3.2.2.1.1 CLIN Structure


The MAC contracts contain contract line item numbers (CLINs) that can accommodate both Cost-Plus-Fixed Fee and Firm Fixed Price requirements. Each of these CLINs has a five-year

period of performance. Including options, the maximum total potential duration of the MAC contracts is fifteen years. Every Task Order will follow the same general CLIN structure that was established in the MAC contracts:

- **COST-PLUS-FIXED FEE (CPFF)** Item 0001, Option Items 0004 and 0007 - All requirements for Cost-plus-Fixed Fee (CPFF) level of effort (hours) or completion type services will be placed under these CLINs. Other Direct Costs, e.g. travel, associated with performance of work under these CLINs are included separately under Item 0003 and option Items 0006 and 0009 since contractors will not be paid any fee on the ODC costs.
- **FIRM FIXED PRICE (FFP)** Item 0002, Option Items 0005 and 0008 - All requirements for firm fixed price level of effort (hours) or completion type services will be placed under these CLINs. Included in the price are all direct and indirect costs, including Other Direct Costs, to complete the effort and profit.
- **COST ONLY** Item 0003, Option Items 0006 and 0009 - These are cost only CLINs (contractor receives no fee) where contractors will be reimbursed for the allowable, allocable and reasonable other direct costs (ODCs) required to perform effort under Items 0001 and Option Items 0004 and 0007. These items may include costs such as travel, facilities, incidental supplies, and mailing/packaging costs. Whether or not a specific type of charge should be classified as an ODC directly chargeable to the contract will depend on the Contractor's accounting system.

CLINS	Period of Performance
0001	01-APR-01 TO 31-MAR-06
0002	01-APR-01 TO 31-MAR-06
0003	01-APR-01 TO 31-MAR-06
0004	01-APR-06 TO 31-MAR-11
0005	01-APR-06 TO 31-MAR-11
0006	01-APR-06 TO 31-MAR-11
0007	01-APR-11 TO 31-MAR-16
0008	01-APR-11 TO 31-MAR-16
0009	01-APR-11 TO 31-MAR-16

Figure 61: SD - New CLIN

At this point, Sub-Contract Line Item Numbers (SLINs) may be added by choosing the *New SLIN* button  and entering the appropriate information. SeaPort provides the first SLIN automatically.

3.2.2.2 New SLIN

A SLIN is a sub line item number. CLINS are comprised of SLINS. To create a new SLIN, a CLIN must first be created.

Under the MACs most task orders will have numerous SLINs. This is driven by two things:

1. Unlike most existing NAVSEA service contracts that have a separate CLIN for each year's requirements, each CLIN of the MACs extends for five years of performance. To create annual options, it will be necessary to create separate SLINs. For example, a base period plus two option periods will require three SLINs:

1. 0002AA Base Year
2. 0002AB First Option Year
3. 0002AC Second Option Year

NOTE: While a CLIN can last for five years, rules regarding availability of funds for obligation and expenditure still govern how the period of performance for a specific SLIN is structured (e.g., O&M,N expires at the end of the fiscal year)

2. The rule regarding only having one line of accounting for each SLIN still applies. So to accommodate the use of different funds, it will be necessary to use different SLINs, just as NAVSEA currently does.

Selecting the icon on the CLIN line opens the New SLIN page.

The image below shows the New SLIN page. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

NOTE: When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.

Figure 62: SD - New SLIN

3.2.2.3 Edit a SLIN

After a SLIN is created, the information may be edited. Editing a SLIN also allows more data to be entered. In addition to the Main tab, there are LLA and Approval.

3.2.2.3.1 Main

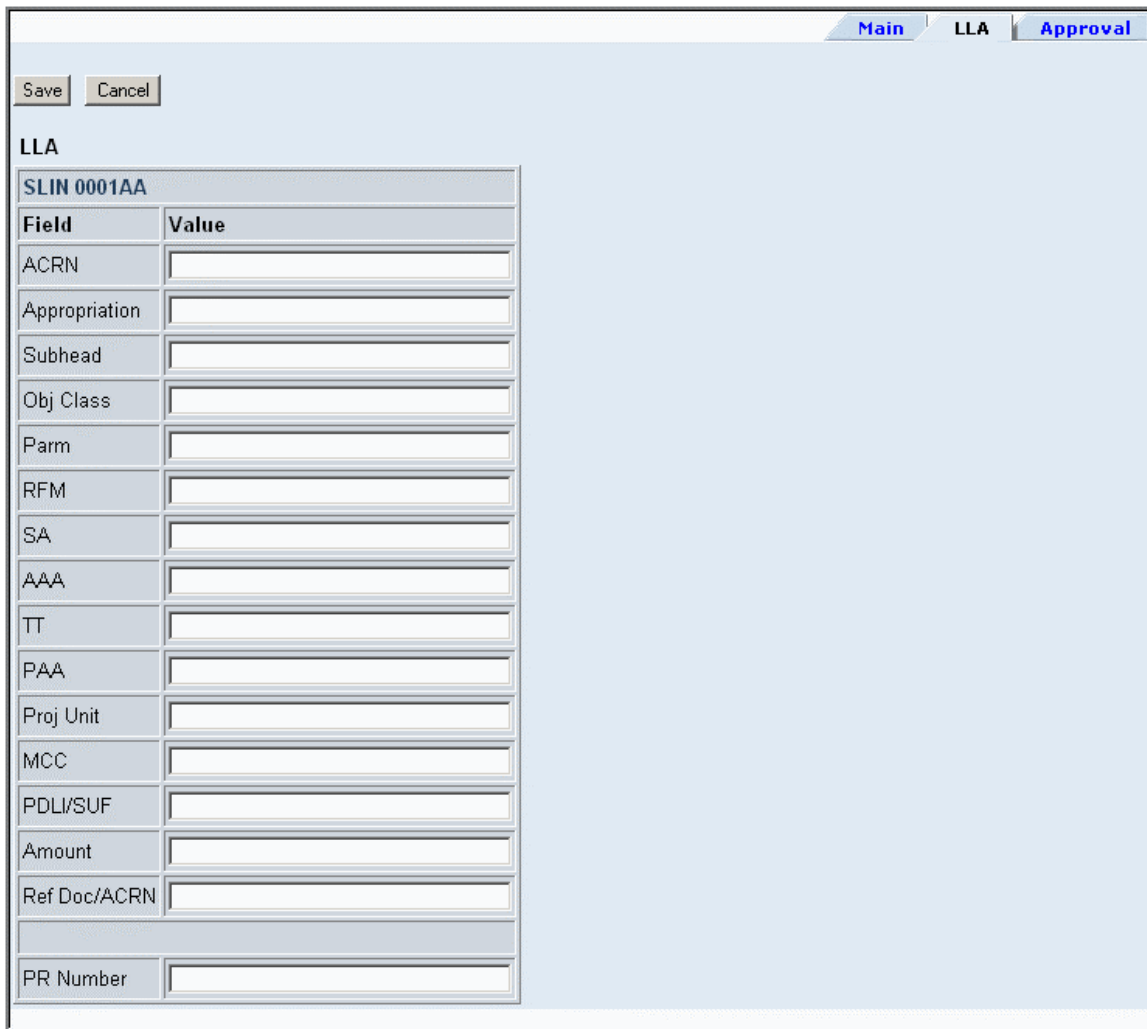
The Main tab allows the user to edit information that was entered when the SLIN was created.

Main						LLA	Approval
Save		Cancel					
SLIN							
SLIN I.D.#	0001 AA	Fund Type	OPN	FMS Case No.			
Firm or Option	Firm <input type="checkbox"/> Award Term	Fee Type	Fixed	Unit of Issue	Labor Hours		
Fiscal Year	04	Cost Plus Fee	1000	Quantity	100		
Recurring Cost	<input checked="" type="radio"/> Yes <input type="radio"/> No	Performance Based	<input type="radio"/> Yes <input checked="" type="radio"/> No	Unit Price	10		
Service Contract Act Applicable	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Period of Performance		From:	April	17	2004		
		To:	April	16	2005		
Short Description	100000						

Figure 63: SD - Edit SLIN - Main

3.2.2.3.2 LLA (Long Line of Accounting)

If LLA (Long Line of Accounting) information is in the LUNAR system, it will be pulled down and reflected here. The LLA information needs to be entered for the Task Order to be executed. If a PR number was generated outside the system, it will be entered here.



Field	Value
SLIN 0001AA	
ACRN	
Appropriation	
Subhead	
Obj Class	
Parm	
RFM	
SA	
AAA	
TT	
PAA	
Proj Unit	
MCC	
PDLI/SUF	
Amount	
Ref Doc/ACRN	
PR Number	

Figure 64: SD - Edit SLIN - LLA

3.2.2.4 Timeline

The *Timeline* button opens the page shown in Figure 65. The timeline provides detailed period of performance information. Bulk adjustments can be made to many SLINs at once using the Timeline feature.

NOTE: Timeline features are designed to function with Microsoft Internet Explorer only.

Table 39: SD Timeline Window - Buttons

Button	Description
Return to Form	Return to the Pricing Structure Panel.
Copy Period	This button is only available when 2 or more periods are selected. The period of performance of the first selected SLIN will be imposed on the other SLINs selected.

Button	Description
Sequence Periods	This button is only available when 2 or more periods are selected. The selected SLINs will be lined up in consecutive periods of performance.
SLIN Details...	Opens the SLIN details window for the selected SLIN.

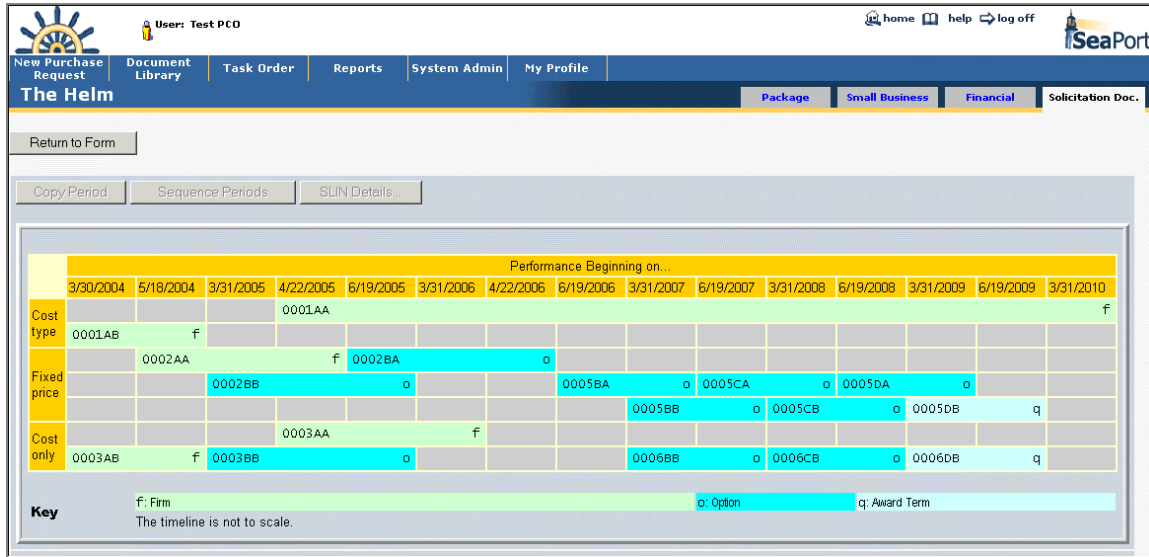




Figure 65: SD - Timeline

3.2.3 Add Requirements data

The Requirements Panel contains all the information about the actual contractor effort required, including reports, statement of work, packaging and marking, and space is also provided for comments. The Requirements Panel consists of list of links (noted in blue text).

Blank icons  reveal text Sections with no data entered. Filled icons  reveal Sections with existing data. Here you will see all of the sections you are used to working with in a Solicitation Document. Some of the sections are pre populated. The following sections are available from the Requirements page.

- Comments
- General Information
- Supply and Services
- Section B Text
- Section C Statement of Work
- Section D Packaging and Marking
- Section E Inspection and Acceptance
- Section F Deliveries or Performance
- Section G Contract Administration Data
- Section H Special Contract Requirements

- Section I Contract Clauses
- Section J List of Attachments
- Section K Contractor's Certifications
- Section L Instructions to Offerors
- Section M Evaluation Criteria

Selecting any of these links will bring up a window in which to enter text. An example of such a window is found in Figure 50. Table 40 below details the fields and buttons contained on the entry forms.

NOTE: Typing into an area that is auto filled can result in your typed text being overwritten by the template text.


NOTE: Standard I Clauses are already contained in the MAC Contract. Only include any additional or special I Clauses.

Table 40: SD Requirements Panel - Fields

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells.
Commercial/Special	Radio	Choose Commercial or Special. Only available in Section D Packaging and Marking.

Table 41: SD Requirements Panel - Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window.
Cancel	Closes the window without saving changes.

Button	Description
View Templates	Represented by the icon  . Opens a pop up window that contains all templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.



The screenshot shows the SeaPort system interface. At the top, there is a navigation bar with 'The Helm' and tabs for 'Package', 'Small Business', 'Financial', and 'Solicitation Doc.'. Below this, there are buttons for 'Validate Sol', 'Lock & Release Solicitation', '1102 Sandbox', and 'Printable SD Pricing'. The main content area displays the 'Requirements' section for Solicitation Document Number: N00024-04-R-7175. A list of sections is shown, each with a checkbox and a document icon:

- [Comments](#)
- [General Information](#)
- [Supply and Services](#)
- [Section B Text](#)
- [Section C Statement of Work](#)
- [Section D Packaging and Marking](#)
- [Section E Inspection and Acceptance](#)
- [Section F Deliveries or Performance](#)
- [Section G Contract Administration Data](#)
- [Section H Special Contract Requirements](#)
- [Section I Contract Clauses](#)
- [Section J List of Attachments](#)
- [Section K Contractor's Certifications](#)
- [Section L Instructions to Offerors](#)
- [Section M Evaluation Criteria](#)

Award Term Clause and Award Term Plan were de-selected on the Procurement panel.

Figure 66: SD - Requirements

3.2.4 Add Procurement data

The Procurement Panel is the area of the SD section in which information specific to this acquisition is collected. Most of the information on this screen is automatically populated with the information that was collected during the PR Wizard, such as the Evaluation Criteria and Type of Procurement. Users must enter the Requested Award Date, the Acquisition Plan

Number, Period of Performance dates, a Security Classification, and Award Term Consideration.

All of the fields on this panel are either drop-down boxes or blank text boxes in which text should be manually entered or cut and pasted. If you elect to incorporate award term incentives, the Award Term Clause and Plan are automatically populated with language that is common to similar service contracts with Award Terms. Since it is a text box, users can manually edit the clause and plan to customize for specific acquisitions.

Table 42: SD Procurement Panel - Fields



Field	Type	Description
Type of Procurement	Radio	Choose Competitive or Sole Source.
Security Classification	Radio	Choose Unclassified or Classified.
Reverse Auction	Radio	Choose Yes or No.
Award Term Consideration	Radio	Choose Yes or No.

Figure 67: SD - Procurement

3.2.5 Add Attachments

The Attachments panel is the same in PR, SD and TO. Users are able to attach any electronic files to the SD that may apply. For example, drawings, specifications, organizational structures, government cost reasonableness, or background information may all be attached

at the Attachments panel. Files that are attached to the Solicitation Document do not automatically become part of the final Solicitation Document. The person who creates the bid event will choose what attachments to include, if any.

To add a new attachment, the user should select the *New* button. By selecting browse on the following screen, the user is able to browse through their files, either locally, a network, or on desk, using a browser. Upon finding the file you wish to attach, double click on the file or click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. The *Save* button returns the user to the main Attachment screen. Under the Actions column, the user can click the pen icon  (to edit the Purpose text) or the trashcan icon  (to delete an attachment).



NOTE: If you want to update an attachment that has already been added, you will need to delete the original and then upload the newer version of the file.

The Attachments panel is used to add attachments to the Solicitation Document. It contains the following data fields and buttons.

Table 43: SD Attachments Panel - Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You may be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved.

Table 44: SD Attachments Panel - Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.
Edit	Represented by the icon  , the attachment's Purpose text can be edited.
Delete	Represented by the icon  , the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer for a file.

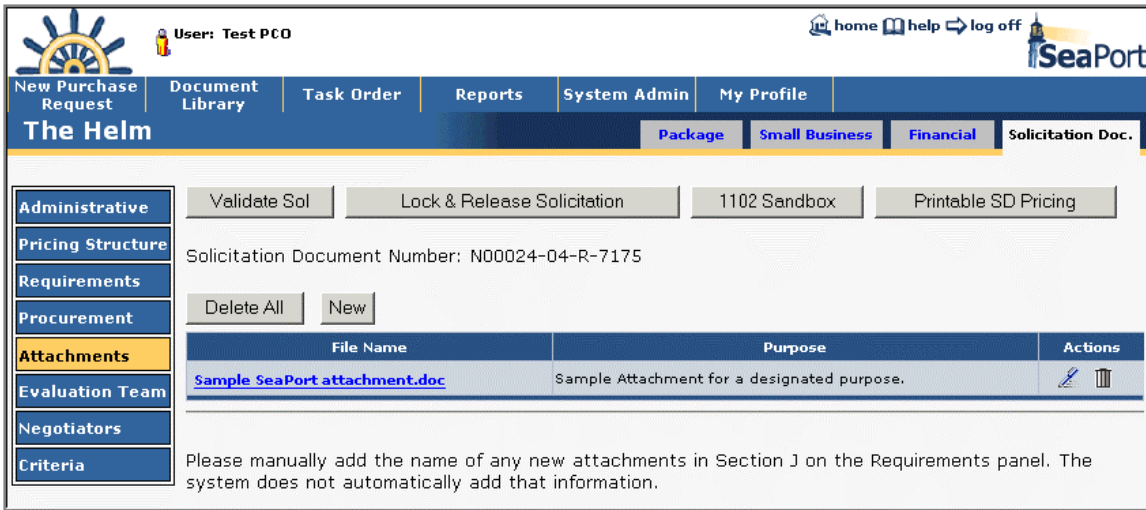


Figure 68: SD - Attachments - With Attachment

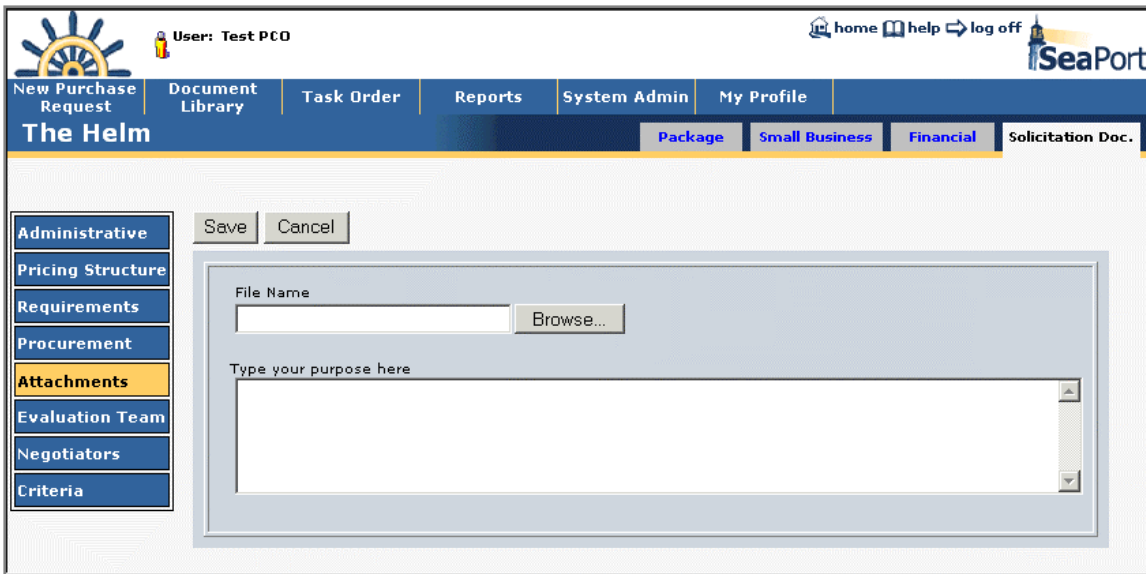


Figure 69: SD - Attachments - Add Attachment

3.2.6 Add Evaluation Team data

The solicitation evaluation team panel is identical in functionality to the evaluation team panel from the PR.

Evaluator data can be added using the User Search feature. The User Search appears in a separate window as shown in Figure 56.

Only the originator of a purchase request (PR), Purchase Request or Solicitation Document (SD) editor, or the PCO can assign, remove, or change the chairman as well as assign or remove members of the evaluation committee.

The originator and PR editor perform their functions from the PR document screen; the PCO and SD editor perform these actions from the Solicitation document screen. Regardless of the screen set used, to get started click the *Evaluation Team* button found in the left-side navigation area and follow these procedures:

Table 45: SD Evaluation Team Panel - Fields

Field	Type	Description
Evaluation Chairman	User Search	Use the User Search feature to add the Evaluation Chairman name. Only one evaluation chairman can be assigned to an evaluation committee. The document originator or the PCO can assign the chairman. If it is desired that a Chairman submit his individual evaluation beside the summary evaluation, the chairman needs to be chosen as an evaluator as well.
Evaluator	User Search	Evaluators are those individuals who will evaluate the proposals once they are received. They should have expertise in one of the evaluated areas such as technical requirement or past performance. Use the User Search feature to add Evaluators. A registered evaluator is a person who already has a SeaPort account (i.e., a user id and password). There is no limit to the number of evaluators that can be assigned to an evaluation committee. When making workload assignments, an evaluator can be assigned to rate any or all of the following evaluation categories: <ul style="list-style-type: none"> ■ Technical ■ Past Performance ■ Cost
Non-registered users	Text Box	A non-registered evaluator is a person who does not already have a SeaPort account. Manually enter the name of any evaluators that do not have SeaPort accounts. A text box is provided to record the name and assignments of those individuals. It is then up to the chairman or the PCO to notify those individuals to register. Non-registered evaluators must be given a SeaPort account before they can access the evaluation system.
Technical Evaluator	Checkbox	Choose this checkbox to designate this person as a Technical Evaluator. Note: Only a Cost Evaluator will see cost information.
Past Performance Evaluator	Checkbox	Choose this checkbox to designate this person as a Past Performance Evaluator. Note: Only a Cost Evaluator will see cost information.

Field	Type	Description
Cost Evaluator	Checkbox	Choose this checkbox to designate this person as a Cost Evaluator. Note: Only a Cost Evaluator will see cost information.

Table 46: SD Evaluation Team Panel - Buttons

Button	Description
Find Chairman	Activate the User Search feature.
Find Evaluator	Activate the User Search feature.
Save	Save the list of Non-registered users.
Delete	Delete the evaluator from the list.

User: Test PCO

home help log off

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile | Package | Small Business | Financial | Solicitation Doc.

The Helm

Administrative | Pricing Structure | Requirements | Procurement | Attachments | **Evaluation Team** | Negotiators | Criteria

Lock & Release Solicitation | 1102 Sandbox | Printable SD Pricing

Solicitation Document Number: N00024-04-R-7175

Evaluation Chairman Name	Activity	Actions
Netscape7	NAVSEA	🗑️

Evaluation Chairman

Chairman: Find Chairman..

Evaluator Name	Activity	Technical Evaluator	Past Performance Evaluator	Cost Evaluator	Actions
tastevaluator1	NAVSEA	☑️	☑️	☑️	📄 🗑️
Test Evaluator 4	NAVSEA	☑️	☑️	☑️	📄 🗑️

Evaluator

Evaluator: Find Evaluator..

Non-registered Users


List all non-registered users: Save

Figure 70: SD - Evaluation Team

3.2.7 Add Negotiators data

The Negotiators panel lists all negotiators that have been added to the Solicitation Document. Negotiators have the option to review the bid evaluation process or proposals. Negotiators can be added to or removed from this list. The controls featured on this page are described in Table 47 below.

Table 47: SD Negotiators Panel - Buttons

Button	Description
Add To The List	Clicking this button will add the selected Negotiator's name to the list above.
Remove	Selecting this icon  will remove the Negotiator's name from the list.

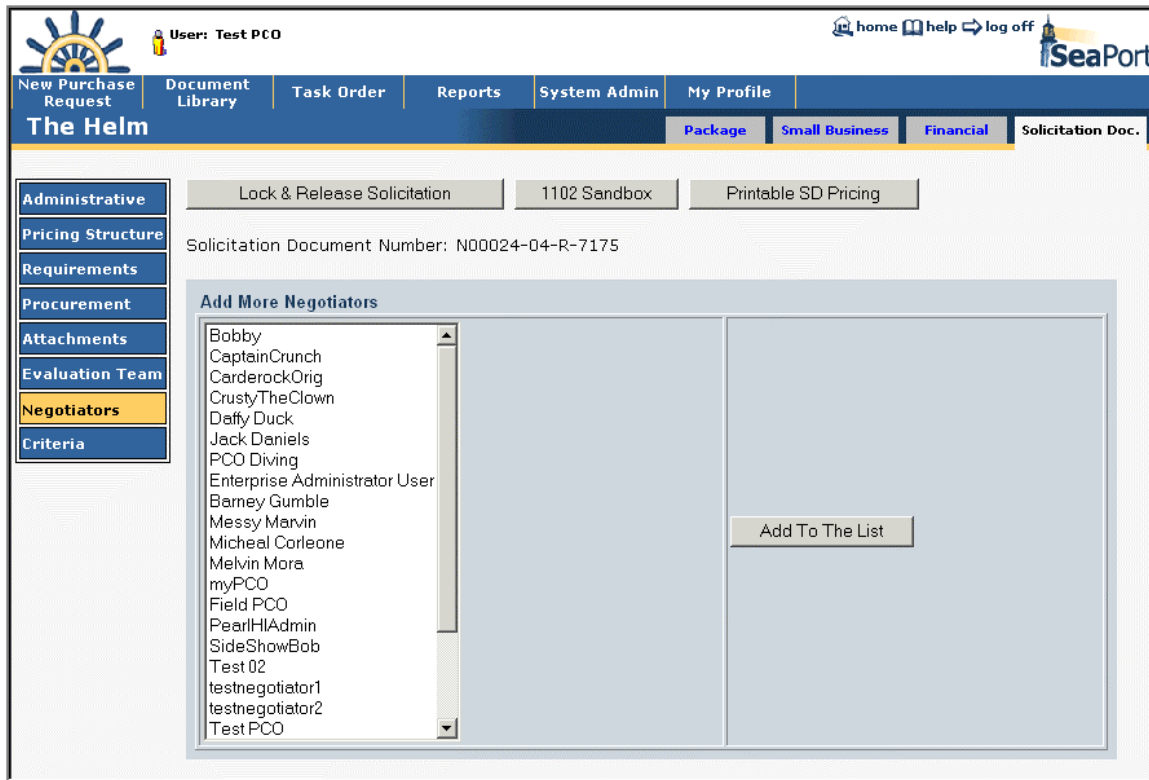


Figure 71: SD – Negotiators

3.2.8 Add Criteria data

Criteria data is information that relates to the submission and review of proposals.

Table 48: SD Criteria Panel - Fields

Field	Type	Description
Previous Contract Work	Radio	Was work done under a previous contract number? Choose Yes, No, or Don't Know.
Contractor currently performing the work	Text Box	The name of the contractor currently performing work on this contract, if applicable.
Contract Number	Text Box	The previous contract number, if applicable.
Contract Amount	Text Box	The previous contract amount, if applicable.
Steps	Radio	<p>Will this be a one step or a 2 step process? Choose 1 Step, 2 Step or Don't Know.</p> <p>One Step Process Under a one step source selection process, bidders submit their proposals based on the solicitation. The proposals are evaluated and award is made.</p> <p>Two Step Process Under the first step of a two step source selection process, interested offerors are asked to submit a one or two page approach summarizing their technical experience and their past performance, as well as a "not-to exceed" (NTE) price. The submittals are evaluated and the top offerors are asked to participate in the second step of the process. The offerors that have been selected to submit proposals for the second step will explain in greater detail the ideas that they submitted in the first step. The SeaPort office can help the program manager decide whether a two step source selection process is appropriate.</p>
Resume	Radio	You can also choose whether or not to receive resumes from those individuals who would be performing the service. Will resumes be required as part of the award determination process? Choose Yes, No, or Don't Know.
Oral Presentation	Radio	If you select to have oral presentations, you need to decide how long the presentations will be. You can also choose if you would like to receive written overviews to review. Will oral presentations be required as part of the award determination process? Choose Yes, No, or Don't Know.
Maximum # of Pages Requested for Technical Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their technical approach. Enter the maximum number of pages requested for the Technical Approach document, if applicable.

Field	Type	Description
Maximum # of Pages Requested for Management Approach	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their management approach. Enter the maximum number of pages requested for the Management Approach document, if applicable.
Maximum # of Pages Requested for Past Performance	Text Box	If you select to receive written proposals, you need to decide how many pages the bidders can submit for their experience statement. Enter the maximum number of pages requested for the Past Performance document, if applicable.

The screenshot shows the 'Criteria' section of a Solicitation Document in the SeaPort-e system. The user is logged in as 'Test PCO'. The document number is N00024-04-R-7175. The 'Criteria' section includes the following fields and options:

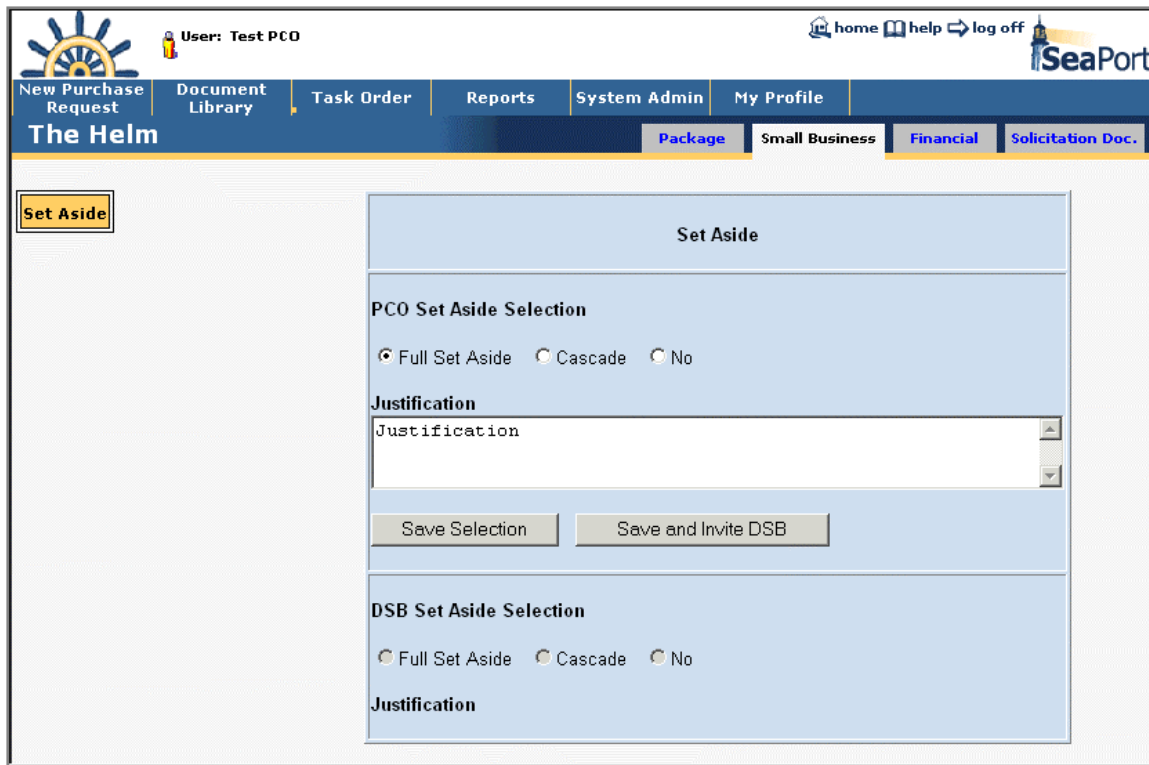
- Previous Contract Work:** Radio buttons for Yes, No (selected), and Don't know.
- Contractor currently performing the work:** A dropdown menu.
- Contract Number:** A text input field.
- Contract Amount:** A text input field with '0' entered.
- Steps:** Radio buttons for 1 Step, 2 Step, and Don't know (selected).
- Resume:** Radio buttons for Yes, No, and Don't know (selected).
- Oral Presentation:** Radio buttons for Yes, No, and Don't know (selected).
- Maximum # of Pages Requested for Technical Approach:** A text input field.
- Maximum # of Pages Requested for Management Approach:** A text input field.
- Maximum # of Pages Requested for Past Performance:** A text input field.

Buttons at the top of the form include 'Save', 'Lock & Release Solicitation', '1102 Sandbox', and 'Printable SD Pricing'.

Figure 72: SD - Criteria

3.2.9 Small Business Set Aside

Saving the Small Business Set Aside selection will allow the Solicitation to be released. Selecting the *Save and Invite DSB* button will send an e-mail to the DSB. The document doesn't have to be in the DSB mailbox to be reviewed.



The screenshot displays the 'Set Aside' configuration page in the SeaPort-e system. The user is logged in as 'Test PCO'. The page features a navigation bar with 'The Helm' selected, and sub-tabs for 'Package', 'Small Business', 'Financial', and 'Solicitation Doc.'. The main content area is titled 'Set Aside' and contains two sections: 'PCO Set Aside Selection' and 'DSB Set Aside Selection'. Each section has radio buttons for 'Full Set Aside', 'Cascade', and 'No', and a 'Justification' text area. At the bottom, there are 'Save Selection' and 'Save and Invite DSB' buttons.

Figure 73: SD - Set Aside

3.2.10 Lock and Release Solicitation

Upon choosing *Yes, Lock & Release Solicitation* the system will perform a validation of the solicitation and if successful display the page shown in Figure 74 below. If the validation fails, the system reports the errors requiring attention via a message box.

Upon successful validation the system generates a final solicitation in the form of a PDF file, provides a unique auction name and notifies a program office reviewer.

After all of the Solicitation Document information is complete, the user will select the *Lock & Release Solicitation* button. This button will only be available to a user with PCO privileges. Doing so will:

- Prevent future changes to this Solicitation
- Create the final PDF for this Solicitation
- Require a Solicitation Amendment for any future changes

Selecting the *Lock & Release Solicitation* button will present the user with the page shown in Figure 74.

NOTE: Additional users may be selected for e-mail notification by selecting the *Add User* button. Selecting the *Add User* button will open the User Search window.

User: Test PCO home help log off SeaPort

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm | Package | Small Business | Financial | Solicitation Doc.

Lock & Release Solicitation

You are about to lock and release this Solicitation. Doing so will...

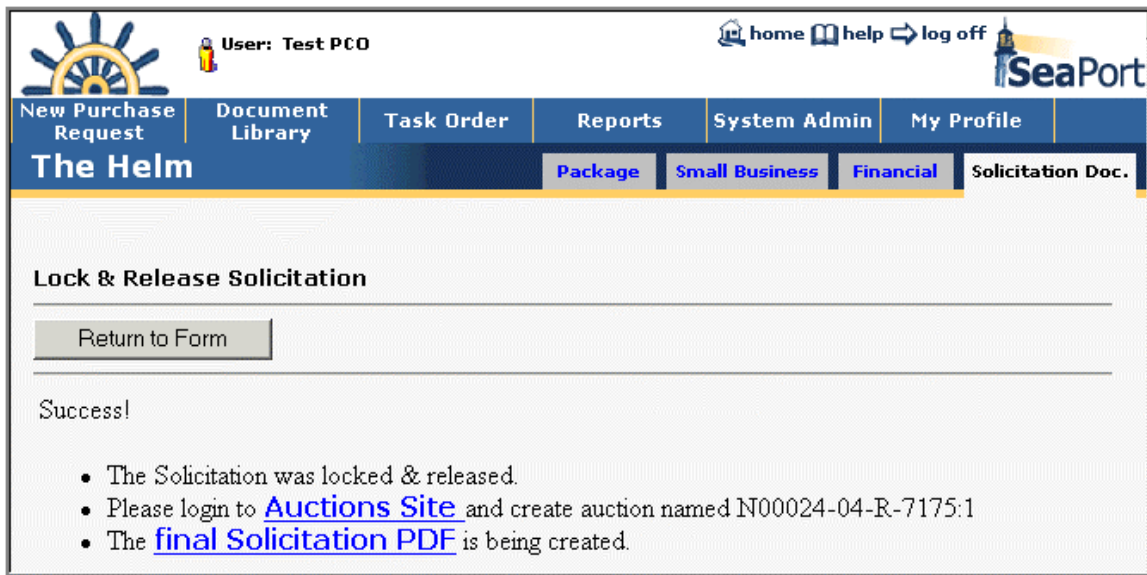
- Prevent future changes to this Solicitation
- Create the final PDF for this Solicitation
- Require a Solicitation Amendment for any future changes

The following users will be notified by email:	
Program Office Reviewer:	Test PCO
Originator:	Test PCO
Evaluator(s):	testevaluator1, Test Evaluator 4
Additional User(s):	<input type="button" value="Add User.."/>

Are you sure you want to proceed?

Figure 74: SD – Lock & Release

The Lock & Release page gives the user an opportunity to change the reviewer, to add users to the notification list, or to cancel the action. Proceeding with the Lock & Release action will create the final solicitation PDF as shown in Figure 75 below. Open the **final Solicitation PDF** and save it to disk (this will be uploaded to the Auctions site later.) Copy the suggested auctions name (N00024-04-R-7175:1 in the example below) to the Windows clipboard by selecting the text, right-clicking on it, and choosing Copy from the pop-up menu. Click on the **Auction Site** link to begin creating the auction.



User: Test PCO

home help log off

New Purchase Request Document Library Task Order Reports System Admin My Profile

The Helm Package Small Business Financial Solicitation Doc.

Lock & Release Solicitation

Return to Form

Success!

- The Solicitation was locked & released.
- Please login to [Auctions Site](#) and create auction named N00024-04-R-7175:1
- The [final Solicitation PDF](#) is being created.

Figure 75: SD - Final Solicitation

3.2.11 Solicitation Amendment Process

If a Solicitation Amendment needs to be created the PCO chooses the specific package from the Document Library and presses the *Create Amendment* button from the Package Home Page as shown below.

The screenshot shows the SeaPort system interface. At the top, there is a navigation bar with tabs for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. Below this is a secondary navigation bar with tabs for 'The Helm', 'Package', 'Small Business', 'Financial', 'Solicitation Doc.', and 'Award Process'. The 'Package' tab is active, and the 'Create Amendment' button is highlighted. Below the navigation, there is a sidebar with 'Package Home', 'History', '1102 Files', and 'Package Admin'. The main content area shows a table with package details:

<i>Package</i>	SD N00024-04-R-7176	<i>Status</i>	Solicitation Released
<i>Organization</i>	NAVSEA 02	<i>TOM</i>	Test TOM
<i>Current Mailbox</i>	Test PCO	<i>Originator</i>	Test PCO
<i>Total Potential Value</i>	333,333	<i>Current Potential Value</i>	
<i>Total Value</i>		<i>Funded Value</i>	
<i>Suspended</i>	No	<i>Archived</i>	No

Below the table, there is a section for 'Package Documents' with a table listing documents and their actions:

	Document	Ob-ID	Actions
1 >	Solicitation N00024-04-R-7176	482	
2 >	PR N00024-04-NR-00187	665	

Figure 76: Create Amendment Button

Upon pressing the *Create Amendment* button the user is presented with a verification box. If the user chooses to continue and create the amendment, the system generates the next sequential amendment number for the specific solicitation, and places the user on the Administrative panel in a draft solicitation amendment document. From this point forward the process is identical to the solicitation process defined earlier in this document.

3.2.12 Create Bid Event

When the Solicitation document is released, the PCO must proceed to create a Bid Event. You must have an administrative account within Auction Services System to be able to create bid events.

To create a Bid Event, login to Auctions Services System as shown below:



Figure 77: Bid Event - Login to Auction Services

The home page presents a number of actions to take. To create a new Bid Event, click on Create Auctions link under Events menu.



Figure 78: Bid Event - Create Auctions

Creating Auctions can be performed either via Wizard, or via a single-step form. Make a selection and click *Next* button.

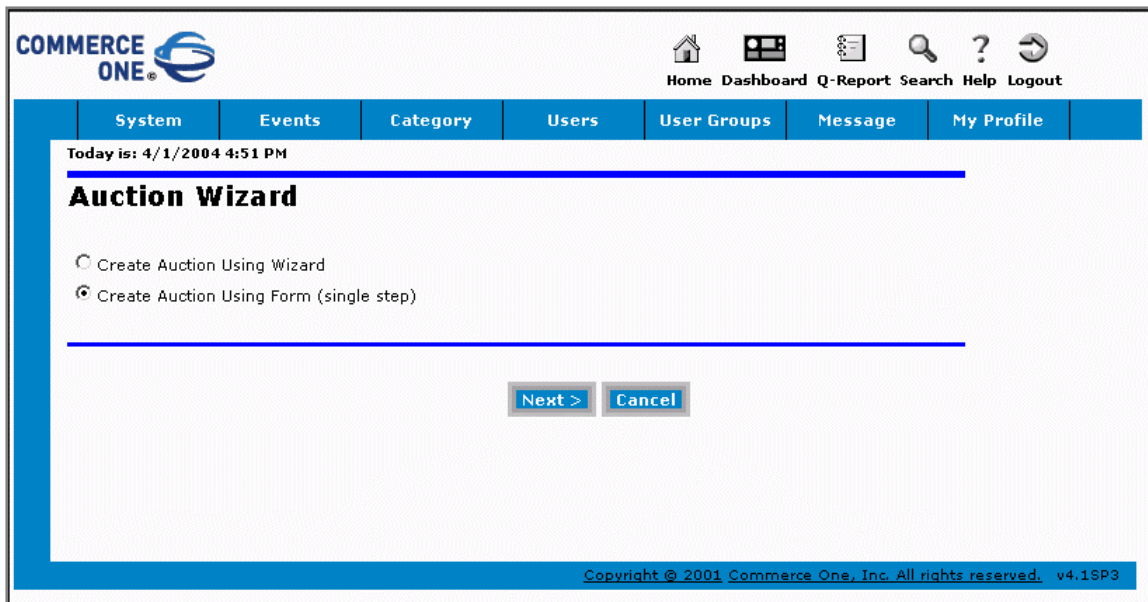




Figure 79: Bid Event - Auction Wizard

Creating an Auction using a single-step form is shown below. The Auction Wizard presents the same entry fields, but in the step-by-step form.





System
Events
Category
Users
User Groups
Message
My Profile

Today is: 4/1/2004 4:54 PM

Auction Creation Form

Auction Details

Enter the **Auction Details** ensuring fields marked as **Required** are complete.

Category Sub-category

Auction Format

Auction Type

Auction Name (Required)

Description

Start Time (Required)

Stop Time (Required)

Currency

Opening Price (Per Unit) (Required)

Reserve Price (Reserve Price must be less than Opening Price.)

Quantity (Required)

Hide Quantity

Hide Opening Price

Hot Auction

Auto Approve Winner

Auction Rule

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Figure 80: Bid Event - Single-Step Form

To create an Auction, follow these steps:

- Select a *Category* from a drop-down list (Seaport or Seaport Enhanced)
- Select a *Sub-category* (MAC)
- Select an *Auction Format* (Reverse Auction)
- Select an *Auction Type* (Sealed Bid Reverse)
- Enter an *Auction Name*. **Note:** make sure that the *Auction Name* **exactly matches** the name offered to you by the Seaport system when the Solicitation for which the Bid Event is being created, was released.
- Enter an *Auction Description*, if desired.

- Enter the *Start Time* and *Stop Time* for your event. (This is when the Auction will be available to offerors.)
- The *Opening Price* and *Quantity* fields are pre-populated for you and can be altered if needed.
- The other fields are not required.

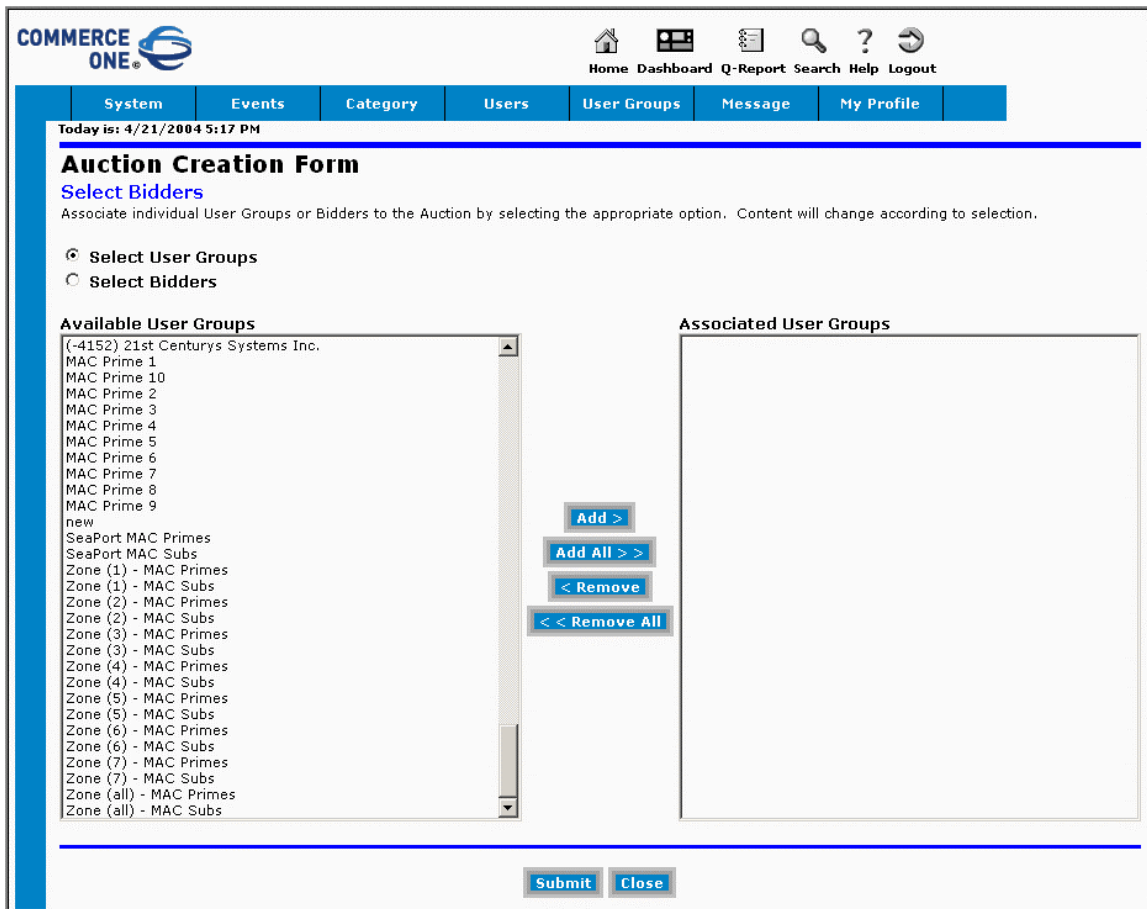
To add files, follow these steps:

- To upload any supporting documents, **such as Solicitation Document PDF**, click the *Attach Files* button. This action will bring up the Add Documents screen as shown in Figure 81 below.
- To upload a document, select *Documents* radio button. To upload a file from your computer, select the *From computer* radio button and click *Browse* to search for a file.
- You can also upload a file from a URL, or select a file from the list of Existing Documents. You may preview the file by clicking *Preview* button located under the Existing Documents list.
- Enter a descriptive name for the file to be uploaded and click *Add*. Your document will show up in the *Documents Added To This Auction* list.
- To remove a file from the list, select its name and click the *Remove* button.
- When done uploading the files, click the *Done* button to return to the main form.

Figure 81: Bid Event - Attach Files

Click the *Select Bidders* button to invite users.

When you choose the *Select User Groups* radio button, you will be presented with the form as shown in Figure 82 below. To add associated User Groups, select them from the list on the left and press the *Add*> button, or click the *Add All*>> button to add all of the groups. To remove groups, use the <*Remove* or the << *Remove All* buttons. Click the *Submit* button when you are done with this step.



COMMERCE ONE

Home Dashboard Q-Report Search Help Logout

System Events Category Users User Groups Message My Profile

Today is: 4/21/2004 5:17 PM

Auction Creation Form

Select Bidders
Associate individual User Groups or Bidders to the Auction by selecting the appropriate option. Content will change according to selection.

Select User Groups
 Select Bidders

Available User Groups

- (-4152) 21st Century Systems Inc.
- MAC Prime 1
- MAC Prime 10
- MAC Prime 2
- MAC Prime 3
- MAC Prime 4
- MAC Prime 5
- MAC Prime 6
- MAC Prime 7
- MAC Prime 8
- MAC Prime 9
- new
- SeaPort MAC Primes
- SeaPort MAC Subs
- Zone (1) - MAC Primes
- Zone (1) - MAC Subs
- Zone (2) - MAC Primes
- Zone (2) - MAC Subs
- Zone (3) - MAC Primes
- Zone (3) - MAC Subs
- Zone (4) - MAC Primes
- Zone (4) - MAC Subs
- Zone (5) - MAC Primes
- Zone (5) - MAC Subs
- Zone (6) - MAC Primes
- Zone (6) - MAC Subs
- Zone (7) - MAC Primes
- Zone (7) - MAC Subs
- Zone (all) - MAC Primes
- Zone (all) - MAC Subs


Associated User Groups


Add >
 Add All >>
 < Remove
 << Remove All

Submit Close

Figure 82: Bid Event - Add User Groups

To invite individual Bidders, use the *Select Bidders* radio button. Use the *Add>*, *Add All>>*, *<Remove* and *<<Remove All* buttons to associate Bidders with the Bid Event. Click the *Submit* button when you are done with this step. Click the *Close* button to return to the main form.





System
Events
Category
Users
User Groups
Message
My Profile

Today is: 4/1/2004 5:02 PM

Auction Creation Form

Select Bidders

Associate individual User Groups or Bidders to the Auction by selecting the appropriate option. Content will change according to selection.

Select User Groups
 Select Bidders

Available Bidders

aera
Greg Organ
plethora
Sean Curry
Steve Tester
Test Bidder4
testbidder1
testbidder2
testbidder3
Testr
testRR
tmasc

[Add >](#)

[Add All >>](#)

[< Remove](#)

[<< Remove All](#)

Associated Bidders

[Submit](#) [Close](#)

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Figure 83: Bid Event - Select Bidders

Press the *Submit* button on the main form (Figure 80) to finish creating a Bid Event. This action will bring you to the list of Auctions. Click on the Auction Name to view/modify Auction details. You can return later to the list of events by clicking on *View/Modify* link under *Events* menu.

Figure 84: Bid Event - List of Events

Message

Now that the Auction has been created, the offerors must be notified. Click the Message link in the header navigation to create an e-mail message that will be sent to the bidders in the user groups we selected earlier.

Selecting the Message link will open the Message Wizard shown in Figure 85 below. Select the second radio button (Send to All Users in a User Group) and click Next.

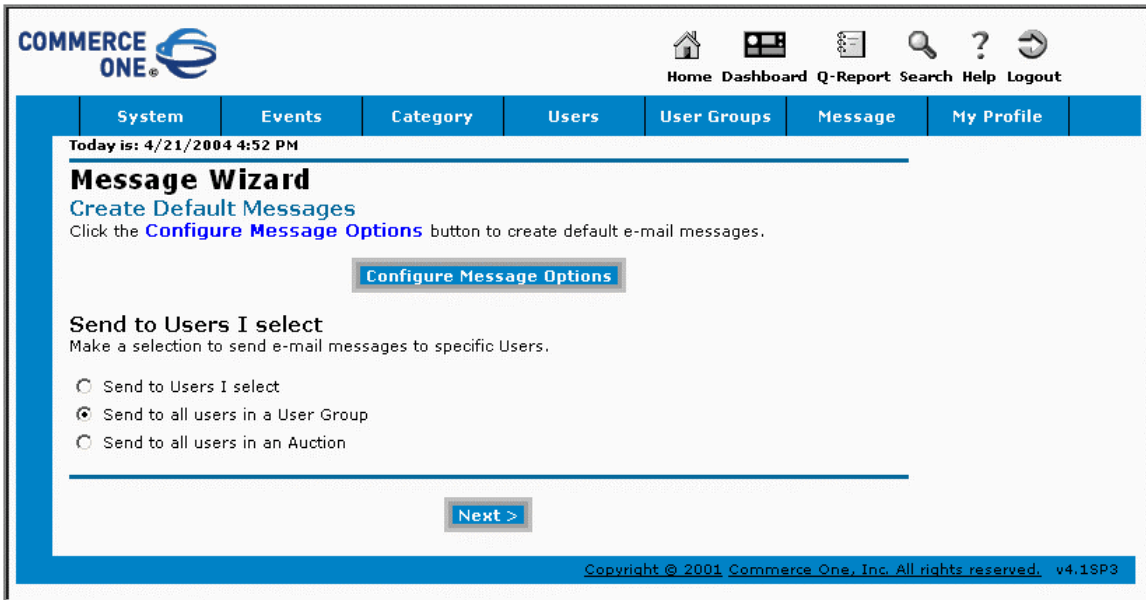


Figure 85: Bid Event - Message Wizard

The next page of the Wizard, shown in Figure 86 below, allows you to choose from a list of User Groups. Select the same groups that were selected when you created the Auction.

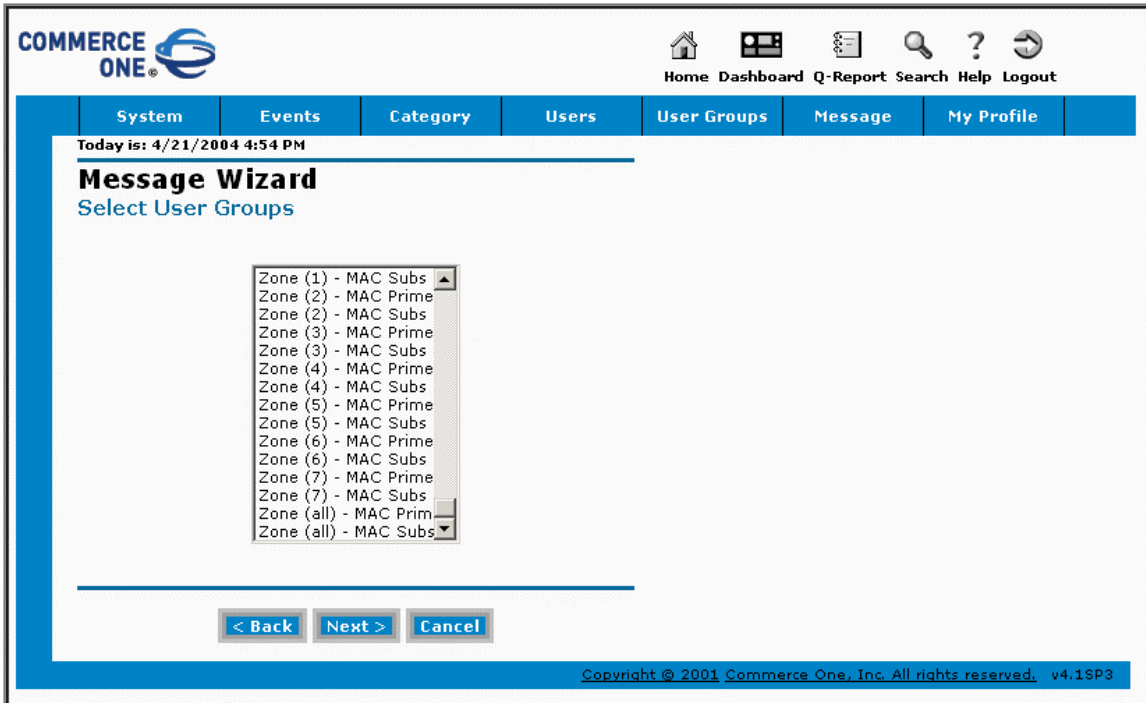
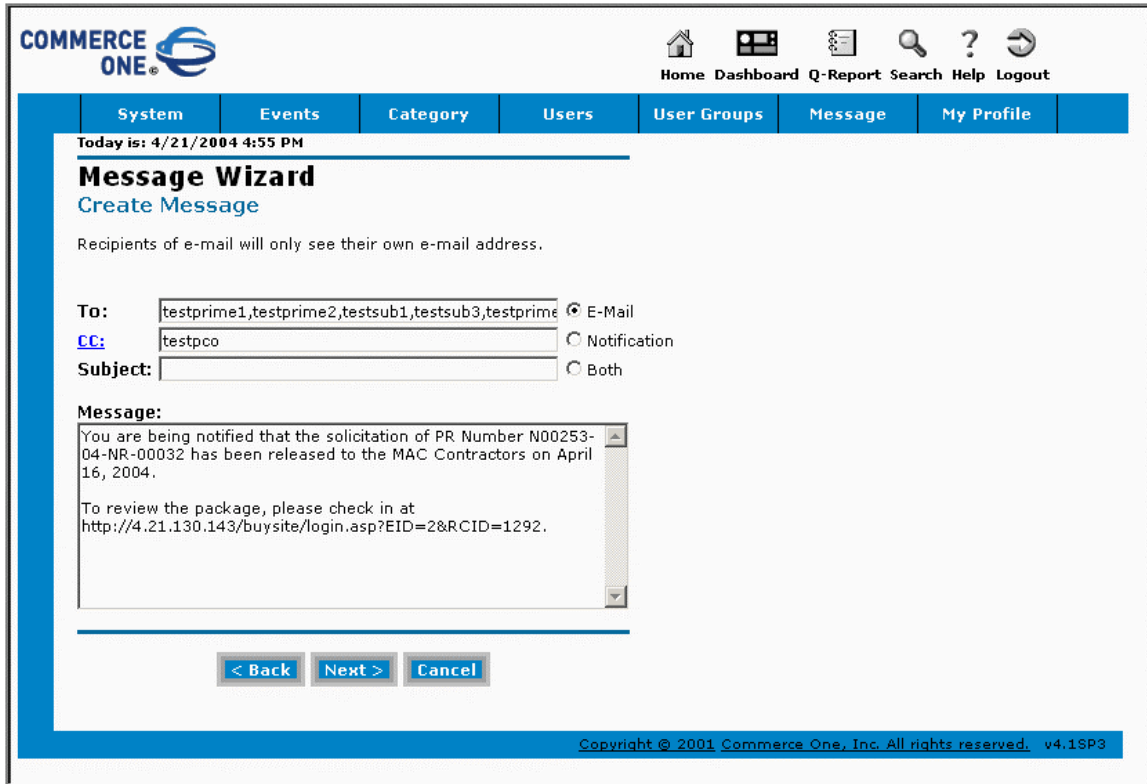


Figure 86: Bid Event - Message Wizard - Select User Groups

The next page of the Wizard, shown in Figure 87 below, allows you to enter the message text that will be sent to the bidders. Select the *E-Mail* radio button as shown.

NOTE: Although the e-mail addresses of the selected bidders appear in the *To:* line of the screen, the e-mail that is generated will not show these names to the bidders.

NOTE: It is advisable to enter your own name in the *CC:* line of the e-mail so that you also receive a copy of the e-mail that is sent. Use the [CC](#) link to search for your name.



COMMERCE ONE

Home Dashboard Q-Report Search Help Logout

System Events Category Users User Groups Message My Profile

Today is: 4/21/2004 4:55 PM

Message Wizard

Create Message

Recipients of e-mail will only see their own e-mail address.

To: testprime1,testprime2,testsub1,testsub3,testprime E-Mail

CC: testpco Notification

Subject: Both

Message:

You are being notified that the solicitation of PR Number N00253-04-NR-00032 has been released to the MAC Contractors on April 16, 2004.

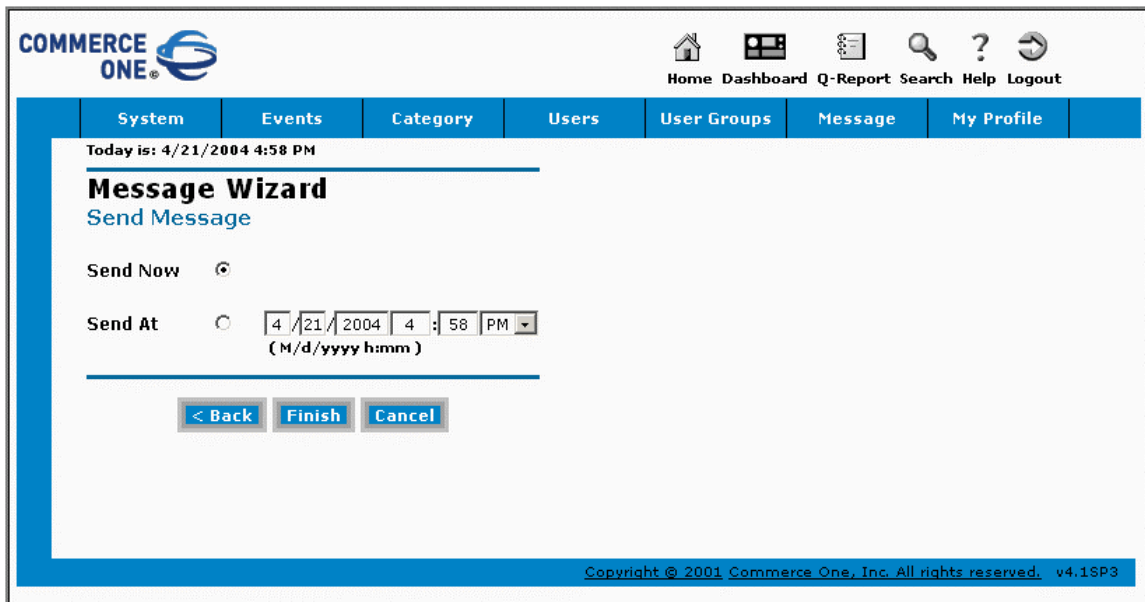
To review the package, please check in at
<http://4.21.130.143/buysite/login.asp?EID=2&RCID=1292>.

< Back Next > Cancel

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Figure 87: Bid Event - Message Wizard - Create Message

The next page of the Wizard, shown in Figure 88 below, allows you to choose when the message will be sent. Choose *Send Now* or *Send At*. Note: *Send At* requires that you enter a date and time in the specified format.



COMMERCE ONE

Home Dashboard Q-Report Search Help Logout

System Events Category Users User Groups Message My Profile

Today is: 4/21/2004 4:58 PM

Message Wizard

Send Message

Send Now

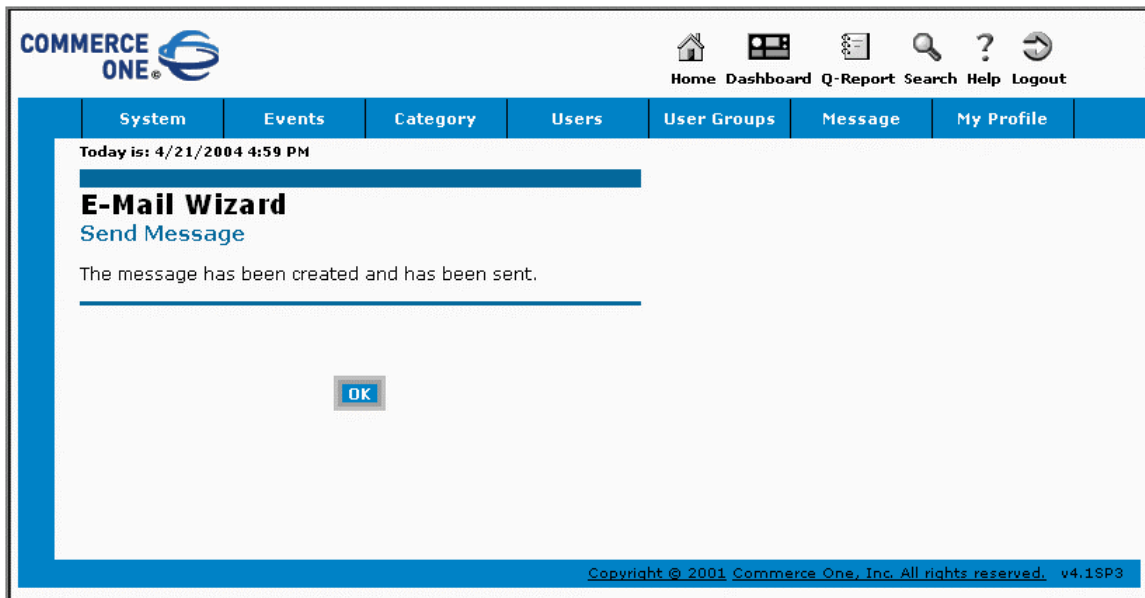
Send At 4/21/2004 4:58 PM
(M/d/yyyy h:mm)

< Back Finish Cancel

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Figure 88: Bid Event - Message Wizard - Send Message

After you click the *Finish* button in the *Send Message* window (shown in Figure 88 above), you will see a confirmation screen that indicates your message was successfully sent. The confirmation screen is shown in Figure 89 below.



COMMERCE ONE

Home Dashboard Q-Report Search Help Logout

System Events Category Users User Groups Message My Profile

Today is: 4/21/2004 4:59 PM

E-Mail Wizard

Send Message

The message has been created and has been sent.

OK

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Figure 89: Bid Event - Message Wizard - Message Confirmation

3.2.13 Award Determination

The Award Process (AP) information and options displayed vary depending upon your SeaPort role. The information and the screen images below represent users with various roles in the system. This was necessary in order to illustrate complete system functionality.

3.2.13.1 Award Process Tab

Only the Evaluate tab is available to those users designated as evaluators on the solicitation document. The Chairman and PCO's view will default to Evaluation Summary tab.

Other tabs available to the PCO and the Chairman are Savings (if a document is subject to Guaranteed Savings) and Select Winner. If a Chairman was also selected to perform an individual evaluation, Evaluate tab will also be visible. Figure 90 illustrates the AP tabs available to a chairman or a PCO who was also selected to perform an individual evaluation (Evaluate tab visible).

3.2.13.2 Summary Evaluation Tab

The Evaluation Summary Tab main section defaults to Evaluations Rating Summary readout that shows each contractor who submitted a bid for this round, name of each evaluator, and the evaluation rating, if completed.

There is an indicator next to evaluator's name showing whether or not the evaluation was submitted. If the evaluator has submitted the evaluation, a Chairman has the ability to unlock the evaluation by pressing the *Unlock* button next to that evaluator's name. This action will allow the evaluator to resume working on the evaluation or to perform necessary changes.

Evaluations Rating Summary (Round 1)		Test PCO (Not Submitted)	testevaluator1 (Submitted) <input type="button" value="Unlock"/>	testevaluator2 (Not Submitted)
Cost				
Acme, Inc.		
Advanced Reasoning, Inc.		
IMS Inc.		
Life Cycle Engineering, Inc.		
Orbis Inc.		
VSE Corporation		
Past Performance				
Acme, Inc.			C...	A...
Advanced Reasoning, Inc.			A...	Neutral...
IMS Inc.			C...	Selected...
Life Cycle Engineering, Inc.			A...	F...
Orbis Inc.			A...	A...
VSE Corporation			D...	Neutral...
Technical				
Acme, Inc.			A...	D...
Advanced Reasoning, Inc.			C...	C...
IMS Inc.			C...	Not Selected...
Life Cycle Engineering, Inc.			A...	F...
Orbis Inc.			B...	A...
VSE Corporation			F...	Neutral...

Figure 90: Award Determination – Evaluation Summary Tab

Next to each rating is an ellipse (...) link that, when clicked, displays the evaluator's comments for that rating.

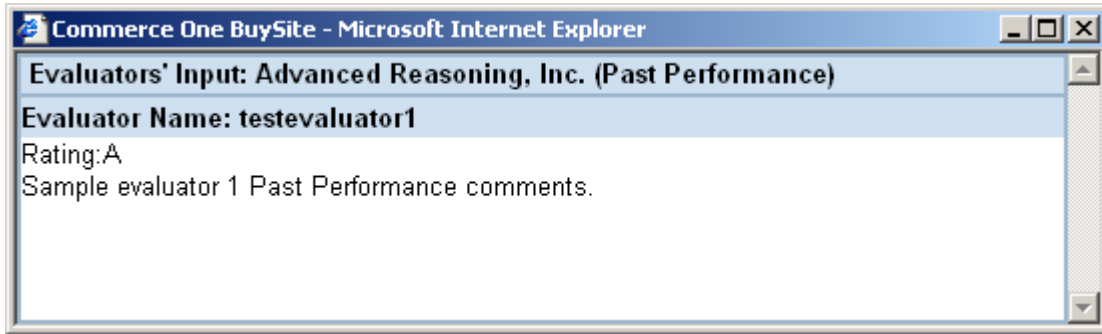


Figure 91: Award Determination – View Evaluator's Input

3.2.13.3 Left Navigation Tree


The left-hand navigation tree of the Evaluation Summary tab contains folders and document links used for navigating the Award Process screens. The tree is shown in Figure 92 below.





Figure 92: Award Determination – Site Navigation Tree

The SeaPort navigation tree is made up of folders and document links. A folder is a container that holds other folders or document links and is used to organize information in meaningful ways.

A folder can be either opened or closed:

To open a folder, click the plus (+) symbol to the left of the closed folder icon. 

To close a folder, click the minus (-) sign to the left of the opened folder icon. 

A document link is used to display portal information and is represented as this type of icon  followed by the link name. When a document link is clicked, information is displayed either in the payload area or in a separate browser window.

3.2.13.4 Sol.Info

Click this link to display, in total, the Statement of Work (Section C), Instructions to Offerors (Section L), and Evaluation Criteria (Section M).



The screenshot shows the SeaPort-e web application interface. At the top, there is a user profile for 'User: Test PCO' and navigation links for 'home', 'help', and 'log off'. The main navigation bar includes 'The Helm' and several tabs: 'Package', 'Small Business', 'Financial', 'Solicitation Doc.', and 'Award Process'. Below this, there are sub-tabs for 'Savings', 'Evaluation Summary', and 'Select Winner'. The main content area displays the 'Solicitation Document No: N00024-04-R-7176'. On the left, a navigation tree shows folders for 'Sol.Info', 'Section C', 'Section L', 'Section M', 'Rounds', and 'Round 1 (Closed for Bids)'. The main content area is divided into two sections: 'Section C: Statement of Work' and 'Section L: Instructions to Offerors'. The 'Section C' section contains three sub-sections: '1. BACKGROUND / PURPOSE / SCOPE', '1.1 BACKGROUND: The mission of the Combat Direction Systems Activity (CDSA) Dam Neck, in part, is to provide acquisition support, life cycle maintenance, test and delivery for carrier, amphibious, forgate, and non-Aegis combat direction systems, advanced sensor distribution systems, and other software-intensive combat control and electronic intelligence systems. In keeping with this mission, SEA92L1 has designated CDSA Dam Neck its Material Support Activity (MSA). MSAs are tasked with the responsibility to insure the technical accuracy of the training materials and to develop and provide technical changes and revisions relevant to submarine Engineering and Operations Training (EOT) materials in response to equipment, software, and operational changes.', '1.2 PURPOSE: The purpose of this acquisition is to acquire those services necessary to support the CDSA MSA in its execution of SEA92L1 assigned tasking.', and '1.3 SCOPE: This Statement of Work (SOW) defines the requirements for contractor support to be provided to CDSA Dam Neck for the maintenance of submarine training curricula, listed below, and their related course materials. This list is not all-inclusive; future courses that will come under the purview of SEA92L1, and be tasked to the CDSA MSA, are also included in the scope of this order.'. The 'Section L: Instructions to Offerors' section contains three sub-sections: 'FAR 52.211-14 NOTICE OF PRIORITY RATING FOR NATIONAL DEFENSE USE (SEP 1990)', 'FAR 52.216-1 TYPE OF CONTRACT (APR 1984)', and 'REQUIREMENTS CONCERNING WORK WEEK (NAVSEA) (MAY 1993)'. The 'FAR 52.211-14' section states: 'Any contract awarded as a result of this solicitation will be a [] DX rated order; [X] DO rated order certified for national defense use under the Defense Priorities and Allocations System (DPAS) (15 CFR 700), and the Contractor will be required to follow all of the requirements of this regulation.'. The 'FAR 52.216-1' section states: 'This delivery order shall incorporate cost type line items (CLINs 0001 and 0004), and cost only items (CLINs 0003 and 0006)'. The 'REQUIREMENTS CONCERNING WORK WEEK' section states: '(a) Uncompensated effort is defined as hours provided by personnel in excess of 40 hours per week without additional compensation for such excess work.'

Figure 93: Award Determination – Solicitation Info

Beneath this folder, you can click on individual document links to display that specific section. In Figure 94 below, Section M is selected.

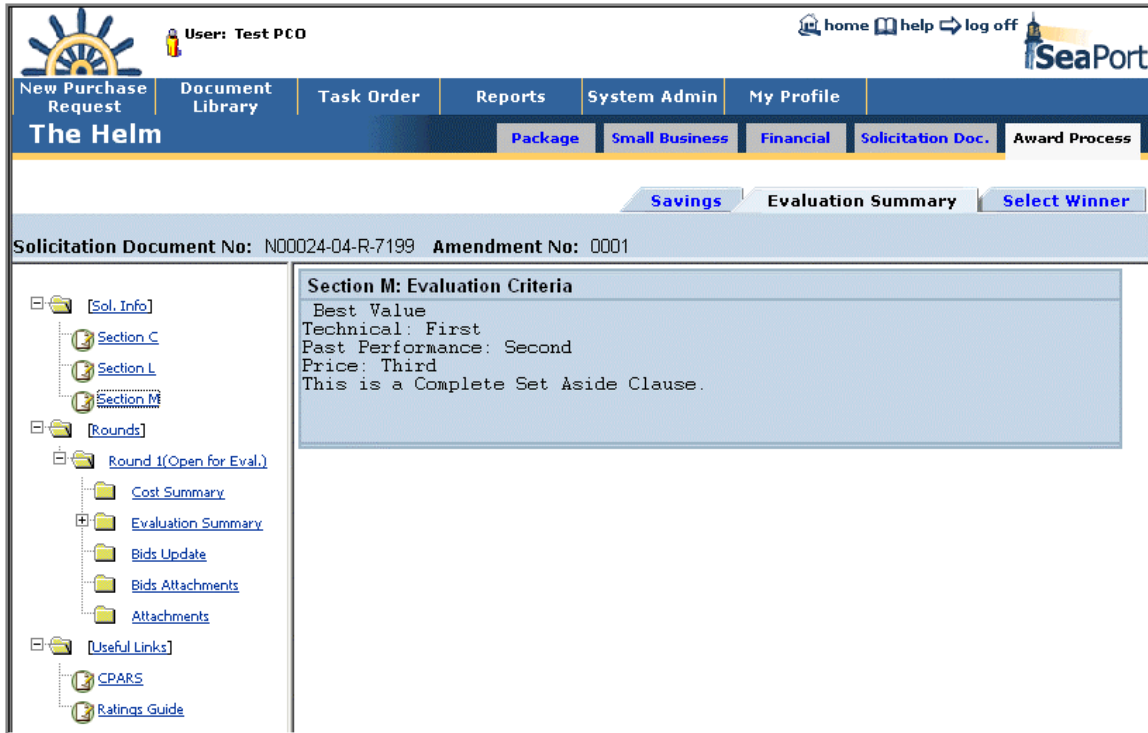


Figure 94: Award Determination – Section M Details

3.2.13.5 Rounds

This folder provides links to individual MAC contractor evaluations by bidding round. Round 1 will list the name of all MAC contractors that submitted proposals during the initial round. Each additional round will contain only the name of the MAC contractors who were selected and submitted proposals for that particular round. Each bidding round will be shown as a separate entry under the Rounds folder. Each round contains information about contractor ratings and evaluations. Round status (whether or not it's open for evaluation) can be found in the parenthesis next to the round number.

Cost Summary

This link provides readout of all contractors' bid totals for this round. Click a contractor name link to display a detailed CLIN/SLIN breakdown for the summary cost/price data. Figure 95 shows the Cost Summary.

Solicitation Document No: N00024-04-R-7199 Amendment No: 0001

Contractor's Cost Proposals (Round 1)					
	Contractor Name	Cost Type (CLIN001)	FFP (CLIN002)	CO (CLIN003)	Total Cost
•	Acme, Inc.	69,000	0	40,000	109,000
•	Advanced Reasoning, Inc.	120,000	0	55,000	175,000
•	IMS Inc.	144,000	0	85,000	229,000
•	Life Cycle Engineering, Inc.	263,800	0	78,954	342,754
•	Orbis Inc.	2,583,621	0	68,479	2,652,100
•	VSE Corporation	68,612,647	0	65,796	68,678,443

Figure 95: Award Determination – Cost Summary

Evaluation Summary

Beneath each round is an Evaluation Summary folder that contains a document link for each MAC contractor that submitted a proposal (for that round). Clicking the contractor’s link name will display a screen where the evaluation chairman can enter his summary comments. The Evaluation Chair Summary page is shown in Figure 96 below. This page contains the following buttons and links.

Table 49: Award Determination – Evaluation Summary – Buttons and Links

Control	Type	Description
View Evaluator’s Input	Link	Click these links to see the comments and ratings submitted by the individual evaluators.
Fill with Inputs	Button	Clicking this button will automatically fill the section comment with corresponding evaluators’ comments.
Rating	Dropdown	Use the Rating drop-down menu to select the overall rating for each rated area.
Save	Button	Click the Save button to save any additions or changes to the database. Note: Only the Chairman has the ability to save the summary.

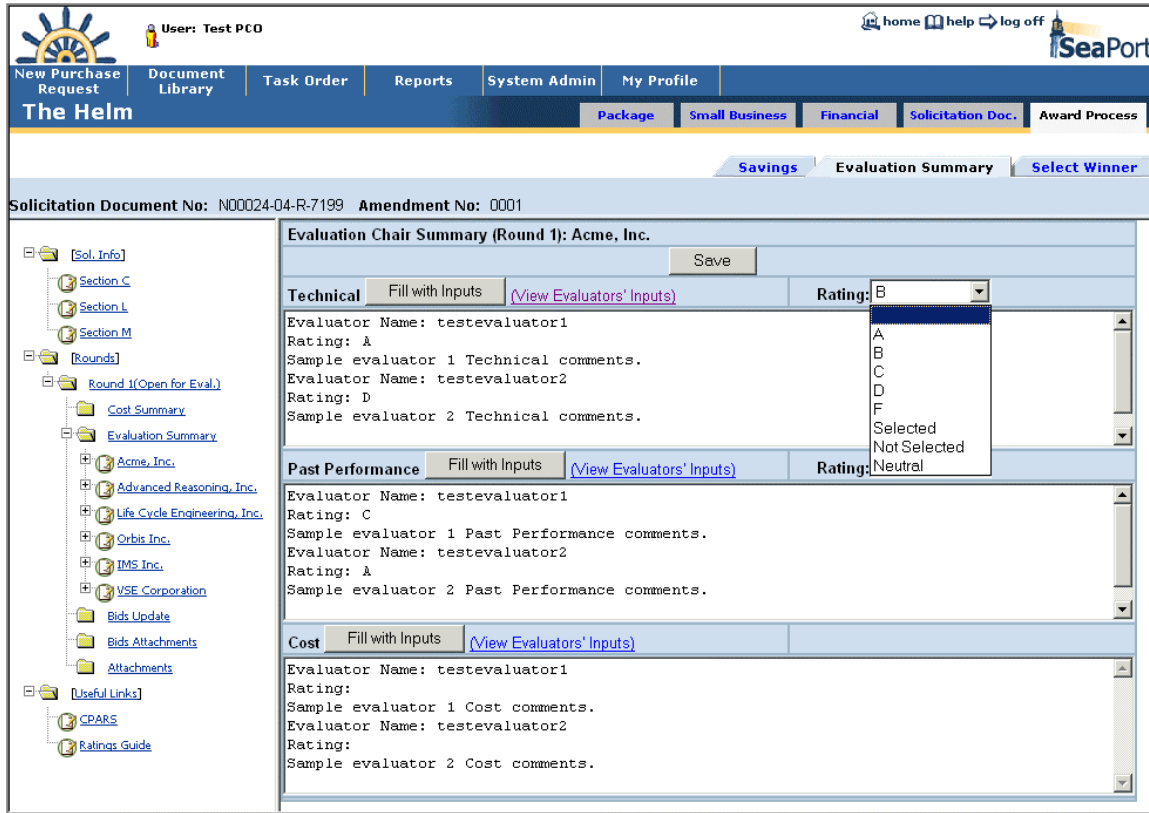
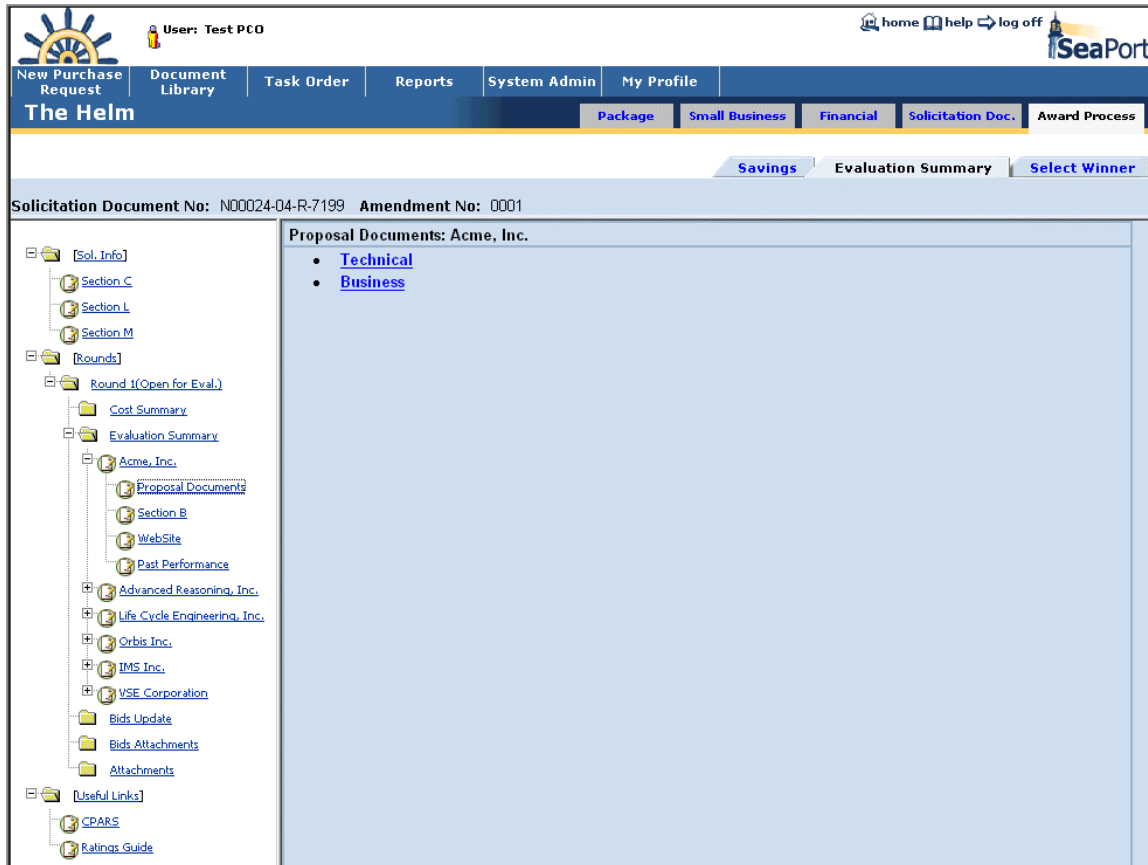


Figure 96: Award Determination – Evaluation Chair Summary

To assist you in preparing your evaluation, there are a number of additional documents and links available to you when you expand the navigation tree under each contractor. These links include Proposal Documents, Section B, WebSite, and Past Performance.

Proposal Documents

Click this link to display a window listing the name of each proposal section, volume, or other attachments submitted by the contractor. Click on the name of the document to display it in its native file format. The Proposal Documents page is shown in Figure 97 below.



The screenshot shows the SeaPort-e web application interface. At the top, there is a user profile for 'Test PCO' and navigation links for 'home', 'help', and 'log off'. Below this is a main navigation bar with tabs for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. A secondary navigation bar includes 'The Helm' and tabs for 'Package', 'Small Business', 'Financial', 'Solicitation Doc.', and 'Award Process'. The 'Solicitation Document' section is active, showing 'Solicitation Document No: N00024-04-R-7199' and 'Amendment No: 0001'. The left sidebar contains a tree view with folders for 'Sol. Info', 'Rounds', and 'Useful Links'. The 'Rounds' folder is expanded to show 'Round 1 (Open for Eval.)', which contains 'Cost Summary', 'Evaluation Summary', and 'Acme, Inc.'. Under 'Acme, Inc.', there are links for 'Proposal Documents', 'Section B', 'WebSite', and 'Past Performance'. The main content area is titled 'Proposal Documents: Acme, Inc.' and contains a bulleted list with links for 'Technical' and 'Business'.

Figure 97: Award Determination – Proposal Documents

Section B

Click this link to display the CLIN/SLIN breakdown of the contractor's cost/price proposal. Section B information is shown in Figure 98 below.

Solicitation Document No: N00024-04-R-7199 Amendment No: 0001

Detailed Cost Proposal: Acme, Inc.

Cost Type					
CLIN/SLIN	Short Description	Est Cost	Fixed Fee	CPFF	
0001AA	Short Description	10,000	1,000		11,000
0001AB	Short Description	20,000	2,000		22,000
CLIN/SLIN	Short Description	Est Cost	Base Fee	Award Fee	CPAF
0001AC	Short Description	30,000	3,000	3,000	36,000
Totals:					69,000

Cost Only (ODCs)		
CLIN/SLIN	Short Description	Est Cost
0003AA	Short Description	40,000
Totals:		40,000
		Grand Total: 109,000

Pass-Thru Rate
 TOSI Pass-Thru Rate: 0.4

Comments
 Sample comments.

Figure 98: Award Determination – Section B - Cost Information

WebSite

Click this link to launch the contractor's Web site in a new browser window.

Past Performance

Click this link to display the Task Order Performance Evaluations Scoring Summary for the contractor you are evaluating. To see the Performance Evaluation in detail, click the View icon for this evaluation. To see the text of each question, roll the mouse over the question mark icon next to the question number. The Past Performance page is shown in Figure 99 below.

Solicitation Document No: N00024-04-R-7199 Amendment No: 0001

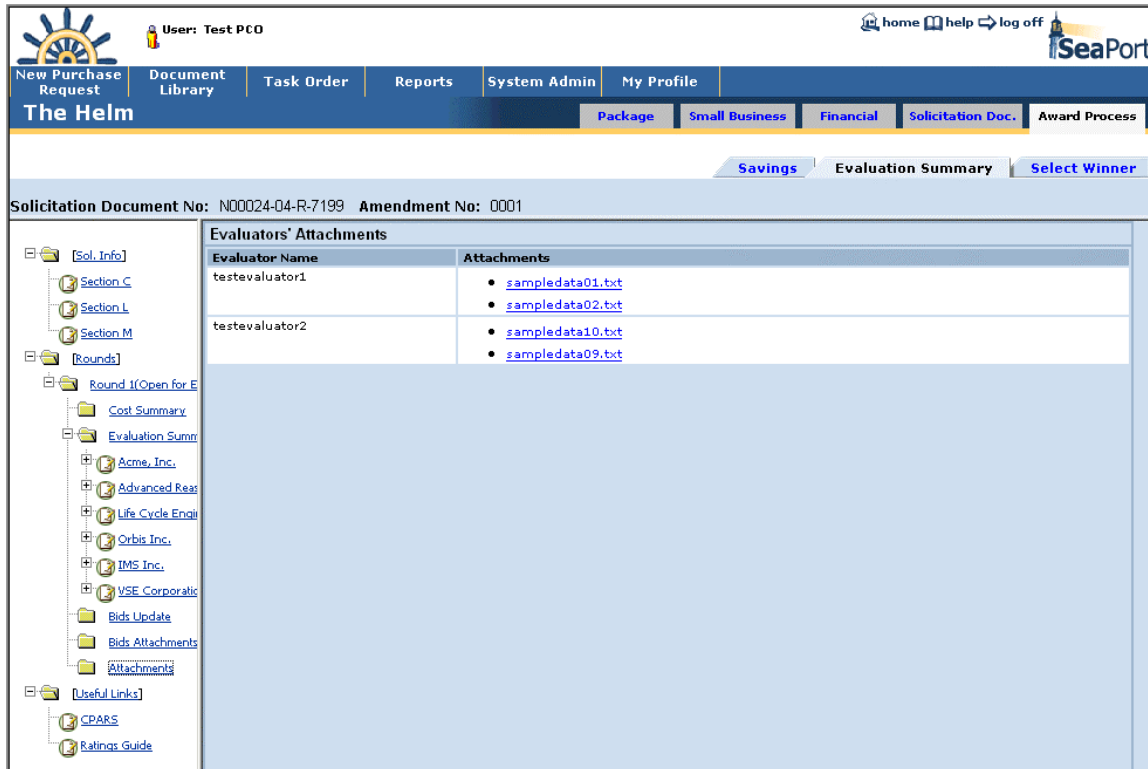
TOPE Scoring Summary

				Q1	Q2	Q3	Q4	Q5	Q6	Overall Avg	
TO Number	Eval Num	From	To	Average Score						View	
N00024-01-D-1112-0002	1	2/19/2004	2/19/2004	4.00	4.00	5.00	4.00	4.00	5.00	4.33	
N00024-01-D-1112-0002				3.00	3.00	5.00	4.00	4.00	4.00	3.83	
Average Score				3.50	3.50	5.00	4.00	4.00	4.50	4.08	

Figure 99: Award Determination – Past Performance

Attachments

Use this link to view a list of evaluators' attachments. Click on the attachment name to view the file.




The screenshot shows the SeaPort-e system interface. At the top, the user is identified as 'Test PCO'. The navigation menu includes 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The main navigation bar includes 'The Helm', 'Package', 'Small Business', 'Financial', 'Solicitation Doc.', and 'Award Process'. The 'Solicitation Document' section is active, showing 'Solicitation Document No: N00024-04-R-7199' and 'Amendment No: 0001'. The 'Evaluators' Attachments' screen displays a table with the following data:

Evaluator Name	Attachments
testevaluator1	<ul style="list-style-type: none"> sampledata01.txt sampledata02.txt
testevaluator2	<ul style="list-style-type: none"> sampledata10.txt sampledata09.txt

The left navigation tree includes 'Sol. Info', 'Section C', 'Section L', 'Section M', 'Rounds', 'Round 1 (Open for E', 'Cost Summary', 'Evaluation Summ', 'Acme, Inc.', 'Advanced Reas', 'Life Cycle Engr', 'Orbis, Inc.', 'IMS Inc.', 'VSE Corporate', 'Bids Update', 'Bids Attachments', 'Attachments', 'Useful Links', 'CPARS', and 'Ratings Guide'.

Figure 100: Award Determination – Evaluators' Attachments

Bids Attachments

Use this link on the left navigation tree to view the summary of bidders' attachments. Use this screen to classify the attachments to be accessible by everybody/ by Cost evaluators only/ by PCOs only. Press Save when done classifying the files. You can delete the attachments by clicking on the trashcan icon .

After all the necessary preparation for bid evaluation process is made (Bids Attachments classification, Bids Update), press the *Open Round for Evaluation* button to release this document to evaluators. This action will invite the evaluators to login into the system and start working on evaluations.

NOTE: This feature is only available to the PCO.

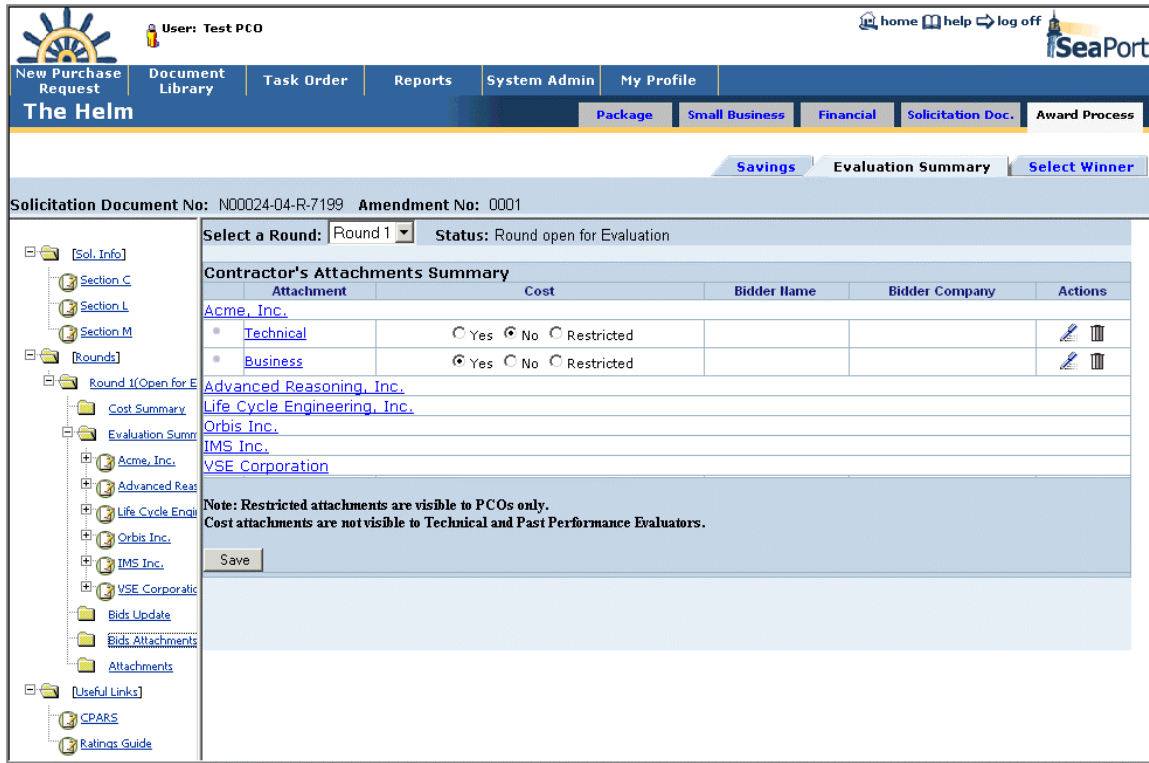



Figure 101: Award Determination – Bids Attachments

To add attachments, click on the contractor’s name or on the edit icon  next to the contractor’s attachment. You will get a screen where you can browse for a file on your machine, indicate whether or not it’s a cost attachment, and press the Save button to add the attachment.

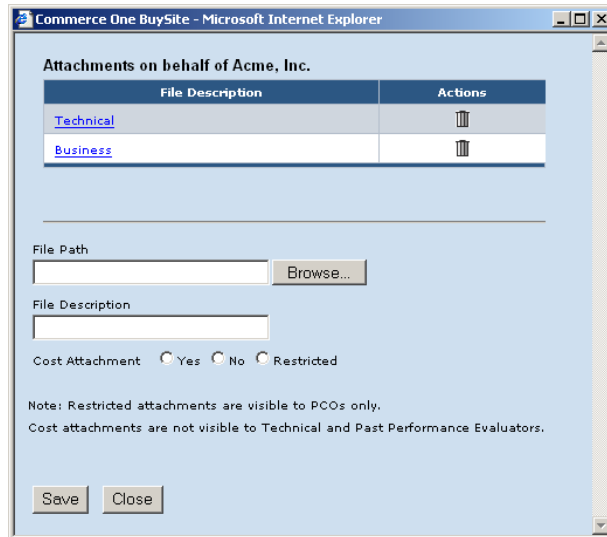



Figure 102: Award Determination – Add Bid Attachments

Bids Update

Click on this link on the left navigation tree to change or add bids on behalf of the contractors. This may be necessary if a contractor had trouble submitting for one reason or another. You can also use this page for opening the bid evaluation process to evaluators by pressing the *Open Round for Evaluation* button.



Figure 103: Award Determination – Bids Update Screen

To access contractor's detailed cost proposal, click on the View icon  next to the contractor's name. This will bring up a screen with cost data as shown in Figure 104 below.

Commerce One BuySite - Microsoft Internet Explorer

Detailed Cost Proposal on behalf of Acme, Inc.

Cost Type						
0001	CLIN/SLIN	Short Description	Est Cost	Fixed Fee	CPFF	
	0001AA	Short Description	10000	1000	11,000	
	0001AB	Short Description	20000	2000	22,000	
Cost Type						
0001AC	CLIN/SLIN	Short Description	Est Cost	Base Fee	Award Fee	CPAF
	0001AC	Short Description	30000	3000	3000	36,000
Totals:					69,000	

Cost Only (ODCs)		
CLIN/SLIN	Short Description	Est Cost
0003		
0003AA	Short Description	40000
Totals:		40,000
		Grand Total: 109,000

Pass-Thru Rate	
TOSI Pass-Thru Rate:	0.4

Comments

Sample comments.

Technician Feature:
 Ignore the Above; Import Values from Yes Really
 If you import a bid, then Save Draft. Do not press Submit.

Figure 104: Award Determination – Detailed Cost Proposal

Enter or edit SLIN data, TOSI Pass-Thru Rate as well as Comments, and press Save Draft to continue working on this bid, or Submit to submit a final bid on behalf of this contractor. To edit/add attachments, press *Edit Attachments* button.

3.2.13.6 Useful Links

This section contains links to related Web sites and other important information. It's available to all Award Process participants and appears at the bottom of the left navigation tree.

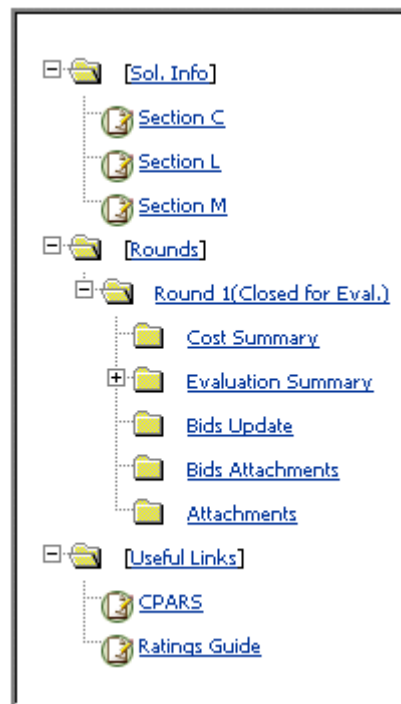


Figure 105: Award Determination – Useful Links

CPARS

This link will bring up a CPARS website in a separate browser window as shown in Figure 106 below.



Figure 106: Award Determination – CPARS Web Site

Ratings Guide

This link will bring up a document describing Evaluation Ratings procedures as shown in Figure 107 below.

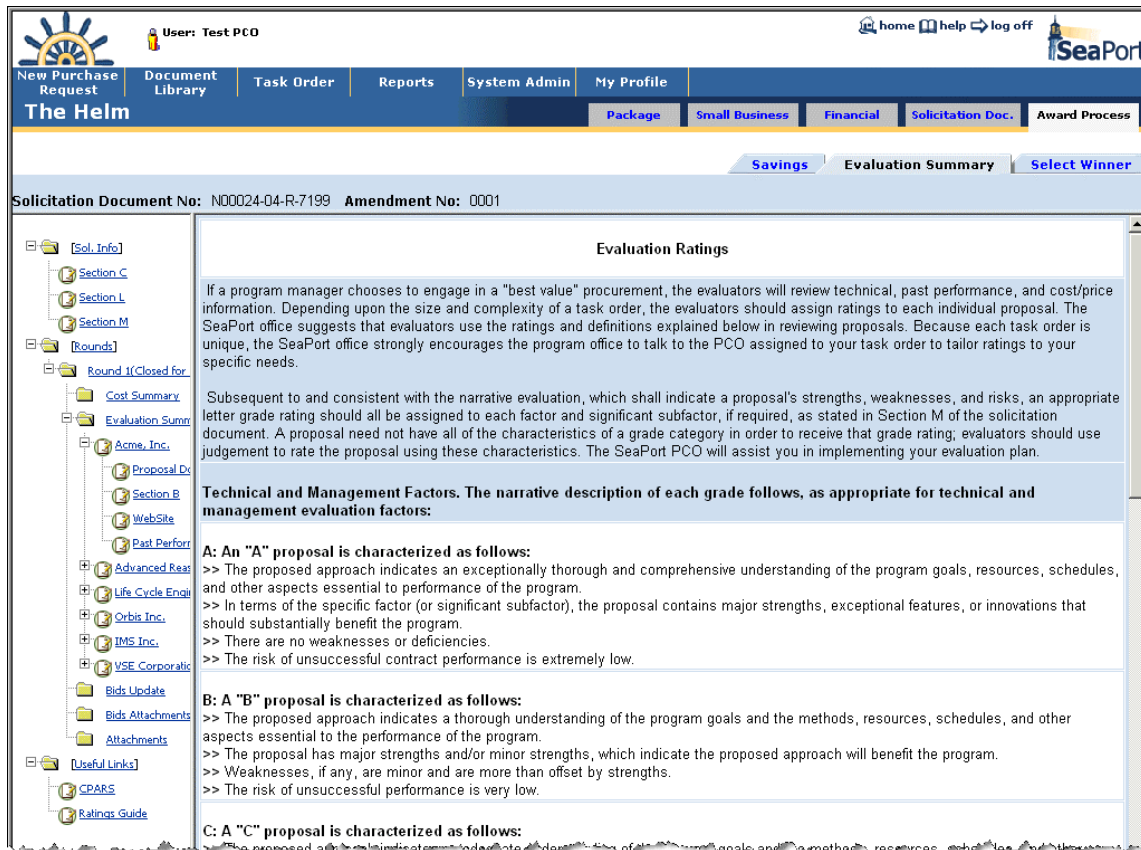


Figure 107: Award Determination – Ratings Guide

3.2.13.7 Understanding the Evaluate Tab

Beneath each round is an Evaluations folder that contains a document link for each MAC contractor that submitted a proposal for that round. Clicking the contractor's link name will display an Evaluation Process screen with the list of contractors to evaluate. The Evaluation Process screen is shown in Figure 108 below.

The screenshot shows the 'Evaluate' tab in the SeaPort-e system. The user is 'Test PCO'. The page displays the 'Evaluation Process (Round 1)' screen. On the left is a navigation tree with folders for 'Sol. Info', 'Section C', 'Section L', 'Section M', 'Rounds', and 'Attachments'. The 'Rounds' folder is expanded to show 'Round 1 (Open for E...)' with sub-folders for 'Cost Summary', 'Evaluations', and 'Attachments'. The 'Evaluations' folder contains links for 'Acme, Inc. (Not Evaluated)', 'Advanced Reasoning, Inc. (Not Evaluated)', 'Life Cycle Engineering, Inc. (Not Evaluated)', 'Orbis Inc. (Not Evaluated)', 'IMS Inc. (Not Evaluated)', and 'VSE Corporation (Not Evaluated)'. The main content area shows a table of contractors to be evaluated:

Contractor	Progress
Click contractor name to open your evaluations	
Acme, Inc.	Not Done
Advanced Reasoning, Inc.	Not Done
IMS Inc.	Not Done
Life Cycle Engineering, Inc.	Not Done
Orbis Inc.	Not Done
VSE Corporation	Not Done

Below the table, the 'Evaluation Chairman' is identified as 'Test PCO' with contact information: Phone: 202-781-3940, Email: tom.myers@aquilent.com. The 'Status' section indicates that the user's evaluation input has not been submitted to the Chair and provides a 'Submit Evaluation Input' button.

Figure 108: Award Determination – List of Contractors to Evaluate

Clicking on the contractor's name pops up a screen to input the rating and comment for evaluation aspects you are eligible to comment on. The example shown in FIGURE demonstrates the input screen for an evaluator who is assigned to perform Technical, Past Performance, and Cost evaluations. If an Evaluator was not assigned to perform all three of these evaluations, only the assigned evaluations would appear in the Evaluator's Input screen. The Evaluator's Input screen allows you to select a rating from a drop-down list and record an evaluation comment.

Press the Save button if you are planning on working on your evaluation later. When you have finished evaluating the contractor, check the *Done* checkbox and click Save.

Press the *Close* button to close the window. The Evaluation Process screen reflects your updated evaluation progress. Your progress also shows in the parenthesis next to the contractor's name in the left navigation area.

When you are ready to send all your evaluations to the chairman, press the *Submit Evaluation Input* button. You will not be able to alter your evaluations after this action.

NOTE: If modifications are required, you may contact the chairman with the request to “unlock” your evaluations.

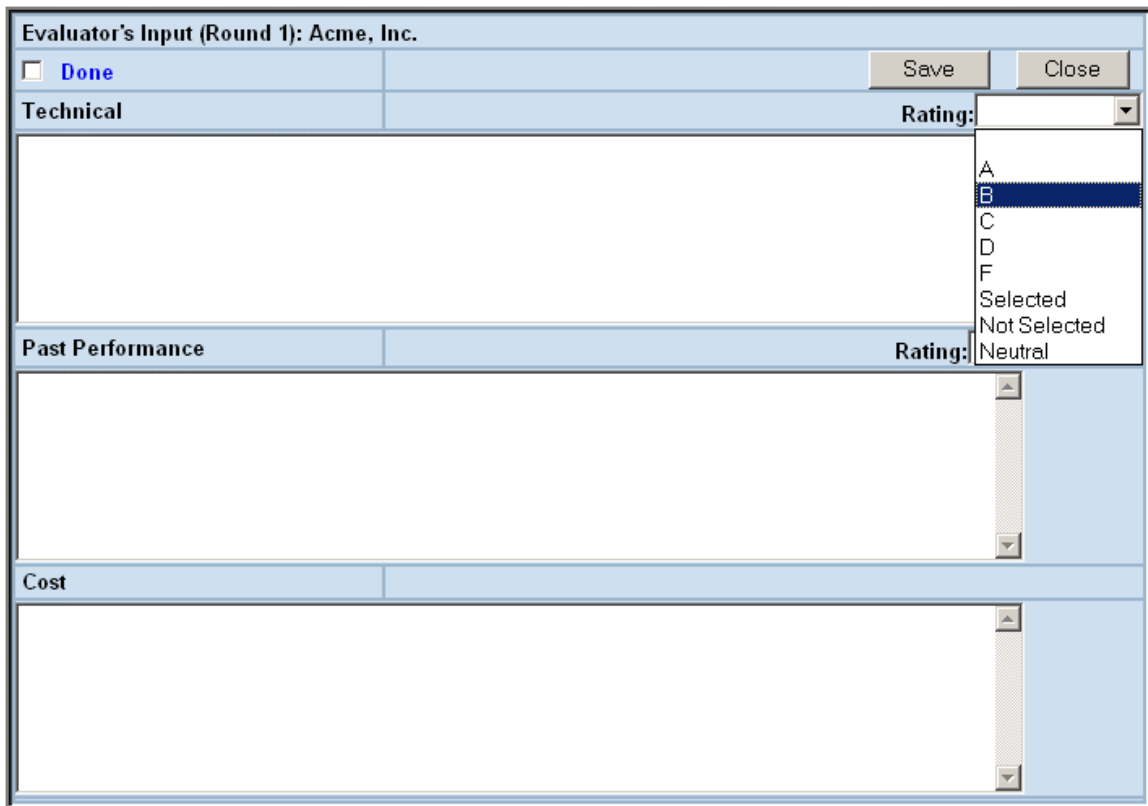


Figure 109: Award Determination – Evaluation Input

NOTE: To assist you in preparing your evaluation, there are a number of additional documents and links available to you when you expand the navigation tree under each contractor.

3.2.13.8 Understanding the Savings Tab

If the document is subject to Guaranteed Savings, then Savings tab is visible to the PCO and the Chairman.

This page contains information about Full Task Proposed Cost, Task Proposed Recurring Cost, Task Bid Savings and MAC Guaranteed Savings broken down by the Task years. The

PCO also has the ability to input Cost Realism values. Click the *Save Cost Realism* button to save the changes.

Task Bid Savings that do not match MAC Guaranteed Savings are highlighted.

You can select a round from a drop-down list to view current round or past rounds of this award process.

ContractorName	Base Year 2004	Option Year 2005	Option Year 2006	Option Year 2007	Total
Acme, Inc.					
Cost Realism					
Full Task Proposed Cost	11,000	22,000	40,000	36,000	109,000
Task Proposed Recurring Cost					
Task Bid Savings (\$)					
MAC Guaranteed Savings (%)	1	1	1	1	1
Task Bid Savings (%)		0	0	0	0
Advanced Reasoning, Inc.					
Cost Realism					
Full Task Proposed Cost	27,500	38,500	55,000	54,000	175,000
Task Proposed Recurring Cost					
Task Bid Savings (\$)					
MAC Guaranteed Savings (%)	0	0	0	0	0
Task Bid Savings (%)		0	0	0	0
Life Cycle Engineering, Inc.					
Cost Realism					
Full Task Proposed Cost	84,586	84,999	78,954	94,215	342,754
Task Proposed Recurring Cost					
Task Bid Savings (\$)					
MAC Guaranteed Savings (%)	0	0	0	0	0
Task Bid Savings (%)		0	0	0	0
Orbis Inc.					
Cost Realism					
Full Task Proposed Cost	173,022	1,584,356	68,479	826,243	2,652,100
Task Proposed Recurring Cost					
Task Bid Savings (\$)					
MAC Guaranteed Savings (%)	0	0	0	0	0
Task Bid Savings (%)		0	0	0	0

Figure 110: Award Determination – Savings Tab

3.2.13.9 Understanding the Select Winner Tab

Processing options accessible via this tab depend upon your role as follows:

Chairman

The chairman will use this tab to (1) recommend the winning contractor or (2) recommend two or more contractors for participation in another round of proposal submissions.

This page provides readout of contractors' cost summary and average grades summary. Click on the contractor's name to bring up a Detailed Cost Proposal for this contractor.

Click one or more checkboxes to select contractor(s). Enter Best Value Justification in the area provided. Use this section to record the best value justification for the winning contractor. This section can also be used to enter the rationale for recommending another proposal

submission round. To save your work, click Save. When ready to finalize a selection and submit it to PCO, click *Recommend Winner* or *Recommend Another Round*. Once clicked, the recommendation is frozen. If needed, contact the PCO to “un-freeze” the recommendation.

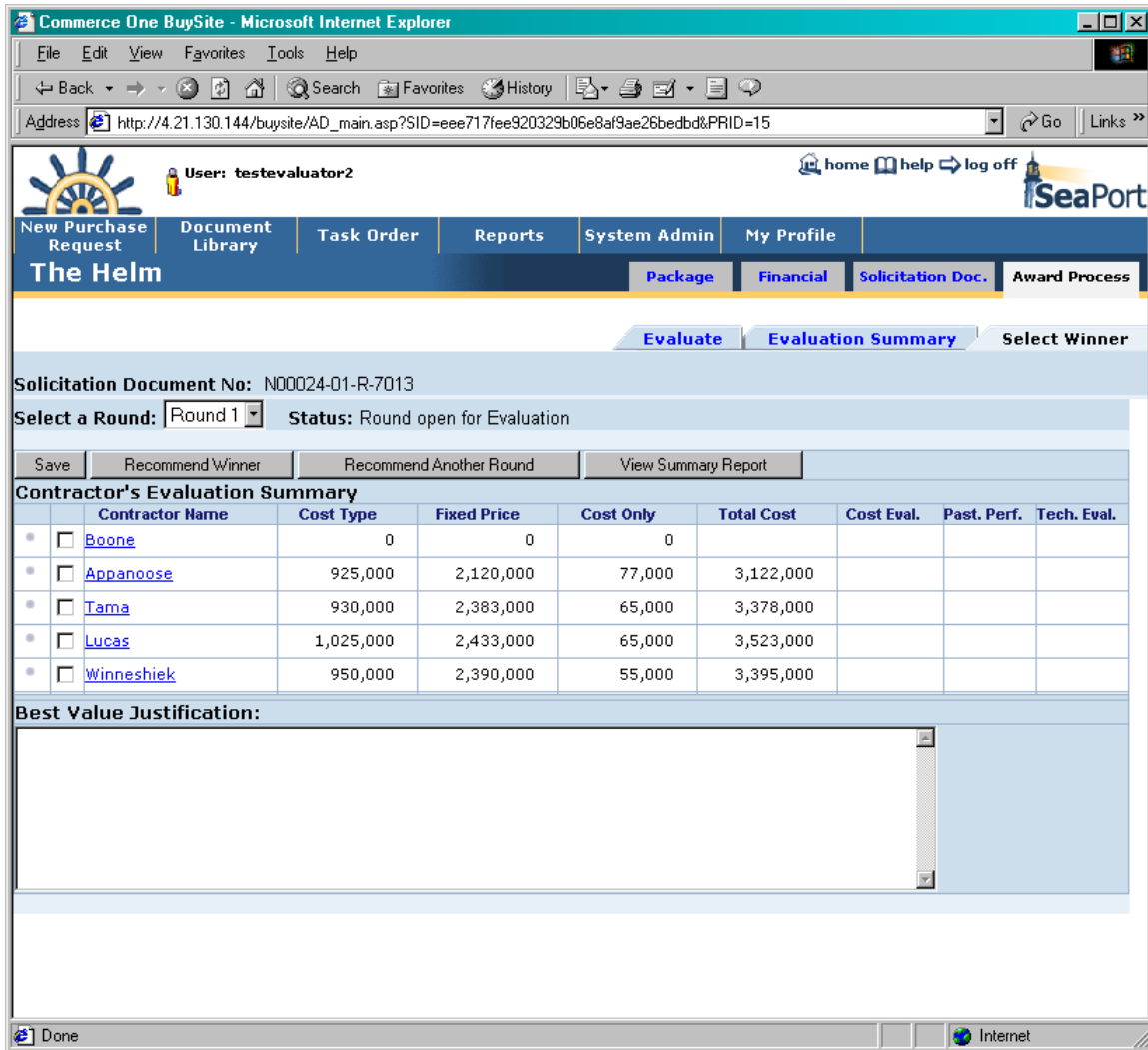


Figure 111: Award Determination – Select Winner Tab – Chairman’s View

The *View Summary Report* button brings up a summary of Chairman’s ratings and comments for each contractor for each evaluation category, as well as Justification text. The Evaluation Summary Report is shown in Figure 112 below.

<input type="button" value="Close"/>
Evaluation Summary:
Acme, Inc.
Technical
Rating: C
Evaluator Name: testevaluator1 Rating: A Sample evaluator 1 Technical comments. Evaluator Name: testevaluator2 Rating: D Sample evaluator 2 Technical comments.
Past Performance
Rating: B
Evaluator Name: testevaluator1 Rating: C Sample evaluator 1 Past Performance comments. Evaluator Name: testevaluator2 Rating: A Sample evaluator 2 Past Performance comments.
Cost
Rating:
Evaluator Name: testevaluator1 Rating: Sample evaluator 1 Cost comments. Evaluator Name: testevaluator2 Rating: Sample evaluator 2 Cost comments.
Advanced Reasoning, Inc.
Technical
Rating: C
Evaluator Name: testevaluator1 Rating: C Sample evaluator 1 Technical comments. Evaluator Name: testevaluator2 Rating: C Sample evaluator 2 Technical comments.

Figure 112: Award Determination – Evaluation Summary Report

PCO

The PCO will use this tab to (1) approve the chairman’s winning contractor recommendation or (2) approve and create an additional proposal submission round.

From this screen the PCO can review the Chairman’s selection and justification as well as view Summary Report. If additional work by the Chairman is needed, the PCO can unlock the recommendation by clicking *Unlock EC Input* button.

The PCO can add to, or alter the Best Value Justification and press the *Save* button to record any changes.

To create another round, more than one contractor must be selected. Press the *Create Another Round* button to finalize the down-selection. You then must go to the Auctions system to manually create another Auction round and invite only the selected contractors.

To create a Task Order, select a winning contractor (or contractors, if a split award is taking place), and press the *Create Task Order* button. This action creates a Task Order document and redirects you to the Administrative page. In split award situation, more than one Task Order is created.

User: Test PCO | home | help | log off

The Helm | Package | Small Business | Financial | Solicitation Doc. | Award Process

Savings | **Evaluation Summary** | Select Winner

Solicitation Document No: N00024-04-R-7199 Amendment No: 0001

Select a Round: Round 1 Status: Round open for Evaluation

Save | Create Task Order(s) | Create Another Round | View Summary Report

Contractor's Evaluation Summary								
	Contractor Name	Cost Type	Fixed Price	Cost Only	Total Cost	Cost Eval.	Past Perf.	Tech. Eval.
<input type="checkbox"/>	Acme, Inc.	69,000	0	40,000	109,000		B	C
<input type="checkbox"/>	Advanced Reasoning, Inc.	120,000	0	55,000	175,000		C	C
<input type="checkbox"/>	IMS Inc.	144,000	0	85,000	229,000		B	B
<input type="checkbox"/>	Life Cycle Engineering, Inc.	263,800	0	78,954	342,754		C	C
<input type="checkbox"/>	Orbis Inc.	2,583,621	0	68,479	2,652,100		A	A
<input type="checkbox"/>	VSE Corporation	68,612,647	0	65,796	68,678,443		Neutral	Not Selected

Best Value Justification:

Figure 113: Award Determination – Select Winner Tab – PCO View

3.3 Practice


Practice in this section involves both SeaPort and the Auction Services site. Since the sites involved are hosted on a training server, it is not possible to complete the auction process. Therefore the Auction will be created, but not closed.

3.3.1 Solicitation Document

Students will complete steps three and four of the Procurement Process described in Section 2.1.2 of the SeaPort II Training Plan. This involves creating a draft Solicitation Document and Locking & Releasing the official Solicitation. Students will enter Solicitation Document data using the sample data found in the tables below.

Setup: If you have not done so already, create three sample files for use in uploading attachments. Label these files: SampleFile1, SampleFile2, and SampleFile3. These can be any type of file.

Table 50: Solicitation Document Data - Administrative

Field	Data
PR No.	System generated and read-only.
Sol. No.	System generated and read-only.
Amendment No.	System generated and read-only.
Date Issued	Use the dropdown list controls to enter a date.
Closing Date	Use the dropdown list controls to enter a date.
Closing Time	Enter a time. Use HHMM format.
Requesting Office	
Organization	Select an Organization from the dropdown list.
Program Office	Enter any program office in the text box.
Issuing Contracts Office	
Contract Negotiator	Select a Negotiator from the dropdown list or use the View All icon  to select from a list of all negotiators in the system.
Zone of Performance	Select a Zone from the dropdown list.
Set Aside	Select any choice.



Use the left navigation to select the Pricing Structure panel. Enter the information in the table below. Use the *New CLIN* button to enter the CLIN information. Use the Add SLIN icon  to enter SLIN information or the Edit icon  to edit the information for an existing SLIN.



Table 51: Solicitation Document Data - Pricing Structure

Field	Data
Guaranteed Savings	Select either choice.
Non-conversion Justification	Enter text in the text box if you selected No for Guaranteed Savings.
New CLIN Window	
CLIN ID	Select a 001 from the dropdown list.
Short Description	Enter text in the Short Description textbox. Save.

Field	Data
New SLIN Window	
SLIN ID #	Enter a two-letter SLIN ID (i.e. AA, AB, BA, etc).
Fund Type	Select a Fund Type from the dropdown list.
FMS Case Number	Enter an FMS case number (format: AA-A-AAA)
Firm or Option	Select either Firm or Option.
Fee Type	Select a Fee Type form the dropdown list.
Unit of Issue	Select a Unit of Issue from the dropdown list.
Fiscal Year	Select a Fiscal year from the dropdown list.
Cost Plus Fee	Enter a number in the textbox.
Quantity	Enter a number in the textbox.
Recurring Cost	Select either choice.
Performance Based	Select either choice.
Unit Price	Select either choice.
Period of Performance	Use the dropdown list controls to enter a From and To date.
Short Description	Enter text in the Short Description textbox. Save.

Use the left navigation to proceed to the Requirements panel. Enter the information in the table below. Click the Requirement's link to enter text for a Requirement. Use a Requirement template to fill in the text field if a template is available. Experiment with formatting the requirement text by using the tags. Preview the requirement text by clicking the Preview button. Formatting help is available by clicking the Help button in any requirement window.

Table 52: Solicitation Document Data - Requirements

Field	Data
 Blank Requirements	Blank Requirements are indicated by the empty document icon. Enter text or use a template to fill each blank requirement.
 Requirements containing data	Requirements containing data are indicated by the filled document icon. Modify several requirements either by typing into the text box or by selecting a template.

Use the left navigation to proceed to the Procurement panel. Enter the information in the table below.



Table 53: Solicitation Document Data - Procurement

Field	Data
Type of Procurement	Select any choice.
Security Classification	Select any choice.

Field	Data
Reverse Auction	Select any choice.
Award Term Consideration	Select any choice.

Use the left navigation to proceed to the Attachments panel. Enter the information in the table below.

Table 54: Solicitation Document Data - Attachments

Field	Data
Attachment 1	Click the <i>New</i> button. Browse to the SampleFile1 and select it. Enter text into the Purpose text box.
Attachment 2	Click the <i>New</i> button. Browse to the SampleFile2 and select it. Enter text into the Purpose text box. Click the Edit icon  for Attachment 1 and change the Purpose text. Save the changes.
Attachment 3	Click the <i>New</i> button. Browse to the SampleFile3 and select it. Enter text into the Purpose text box. Click the Delete icon  to delete Attachment 2.


Use the left navigation to proceed to the Evaluation Team panel. Enter the information in the table below.

Table 55: Solicitation Document Data - Evaluation Team

Field	Data
Evaluation Chairman	Click the <i>Find Chairman</i> button and select a Chairman using the User Search feature.
Evaluator	Click the <i>Find Evaluator</i> button and select an Evaluator using the User Search feature.
Non-registered users	Enter text into the Non-registered users textbox. Save.

Use the left navigation to proceed to the Negotiators panel. Enter the information in the table below.

Table 56: Solicitation Document Data - Negotiators

Field	Data
Add To The List	Select a Negotiator's name from the list on the left. Click the <i>Add To The List</i> button. Hold the Ctrl key down to select multiple Negotiators. Use the Shift key to select all Negotiators between your first and second selection. Add 5 Negotiators.
Remove	Delete 3 Negotiators by selecting the Delete icon  corresponding to their name.

Use the left navigation to proceed to the Criteria panel. Enter the information in the table below.

Table 57: Solicitation Document Data - Criteria

Field	Data
Previous Contract Work	Select any choice.
Contractor currently performing the work	Enter any contractor's name into the Contractor currently performing the work textbox.
Contract Number	Enter a contract number.
Contract Amount	Enter a numerical contract amount.
Steps	Select any choice.
Resume	Select any choice.
Oral Presentation	Select any choice.
Maximum # of Pages Requested for Technical Approach	Enter a number of pages less than 10000 into the Technical Approach text box.
Maximum # of Pages Requested for Management Approach	Enter a number of pages less than 10000 into the Management Approach text box.
Maximum # of Pages Requested for Past Performance	Enter a number of pages less than 10000 into the Past Performance text box.

Validate Sol

You have completed entering information for the Solicitation Document. Use the Sol button to check your work. If validation is not successful, enter the missing information and validate again. Continue to validate the Solicitation Document until you are successful.

Lock & Release Solicitation

Click the Lock & Release Solicitation button. The confirmation screen will be presented. Make no changes here.

Yes, Lock & Release Solicitation

Click the Yes, Lock & Release Solicitation button.

The Success screen is presented. Copy the suggested Auction name. Save the Final Solicitation PDF file to the Desktop of the computer you are using by clicking on the **final Solicitation PDF** text and then clicking on the **Your PDF** text in the next screen. The final PDF will be displayed in the Adobe Acrobat Reader. Save the file from the reader.

3.3.2 Auction Services

Students will complete steps four and five of the Procurement Process described in Section 2.1.2 of the SeaPort II Training Plan. This involves creating a bid event for MAC contractors and completing the award determination process. Students will enter Auction data using the sample data found in the tables below.

Setup: If you have not done so already, save the Final Solicitation PDF to your computer's Desktop. Copy the name of the auction to the Windows clipboard.

Open the Auctions site in a separate browser window.

Login to the Auctions site.

Choose to create an auction from the Edit menu. Select **Create Auction Using Form (single step)** and enter the following information. Leave all other fields alone.

Table 58: Auction Services Date – Auction Details

Field	Data
Category	SeaPort Enhanced
Sub-Category	Default
Auction Format	Reverse Auction
Auction Type	Sealed Bids Reverse
Auction Name	Enter the exact auction name that was given to you when the solicitation was locked and released.
Description	Enter any text here or leave blank (not required).
Start Time	Enter a start time that is at least 5 minutes from now.
Stop Time	Enter a stop time that is greater than the start time.
Reserve Price	Enter 1

1. Click the *Attach Files* button at the bottom of the screen. The *Add Documents* screen is displayed.
2. Select the *From Computer* radio button and click the *Browse* button. Select the Final Solicitation PDF file that you placed on your computer's desktop earlier.
3. Type a name in the Name text box. Paste in the document number that you used as an Auction name here.
4. Click the *Add* button. The document name appears in the *Documents Added To This Section* textbox.
5. Click the *Done* button. You are returned to the main Auction screen (Auction Details).
6. Click the *Select Bidders* button at the bottom of the screen. The *Select Bidders* screen is displayed.
7. Select the *Select User Groups* radio button and choose the MAC primes and MAC subs for your zone from the list. Add these groups.

8. Click the *Submit* button to save your selection. Click the *Close* button to continue.
9. Click the *Submit* button on the main Auctions screen (Auction Details). The Auction is created and you are presented with the Events screen.
10. Click the Message link in the header navigation.
11. Select the *Send to all users in a User Group* radio button and click *Next*.
12. Choose the MAC primes and MAC subs for your zone from the list and click *Next*.
13. Type in a message that includes the Auction name, the start time, and the stop time. Click *Next*.
14. Select the *Send Now* radio button and click *Finish*.
15. You have now finished with Auction Services. Close this window.

3.4 Adjust

The instructor will evaluate the students' progress through the exercises above. Areas of particular difficulty will be reviewed and addressed as necessary.

4 Task Order

This section details the Task Order training session. The Task Order training session follows the structure outlined in the SeaPort II Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

4.1 Task Order Workflow

A Task Order is an individual delivery order against a Multiple Award Contract that establishes nature of services desired and required period of performance. The diagram below illustrates the task order workflow within SeaPort.

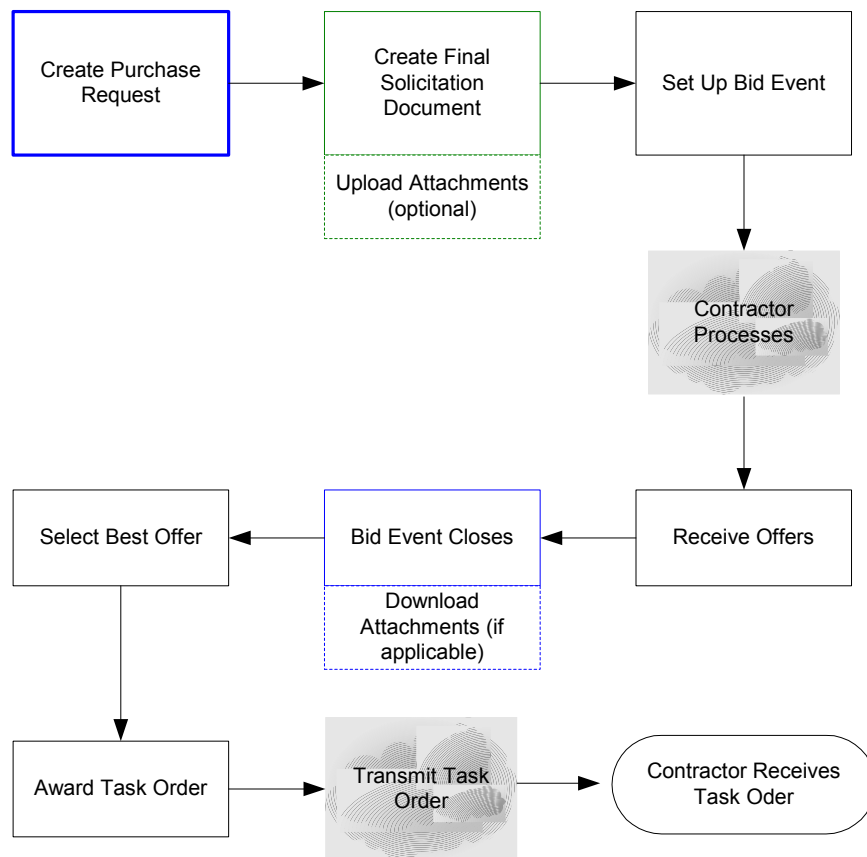


Figure 114: Task Order Workflow

4.2 Task Order Generation

After a proposal has been selected for award, the information in the Solicitation Document is transferred to the Task Order for final processing by SEA 02 and execution by the PCO. The Task Order is initially pre-populated with data from the Solicitation Document. The Originator

may review the information contained in the Task Order panels, but does not have the ability to update. Pricing information will reflect the winning proposal.

4.2.1 Create a Draft Task Order

As part of the Award Determination process a Draft Task Order is created from a Solicitation Document. This is done from the Select Winner page by selecting a winner from the list and clicking the *Create Task Order(s)* button. In the Select Winner tab illustrated in Figure 115 below, the *Create Task Order(s)* button is highlighted. The draft TO is given the next sequential number for the winning MAC contractor, and its fields are populated with information from both the purchase request and solicitation. The user is then taken to the Task Order Administrative panel.

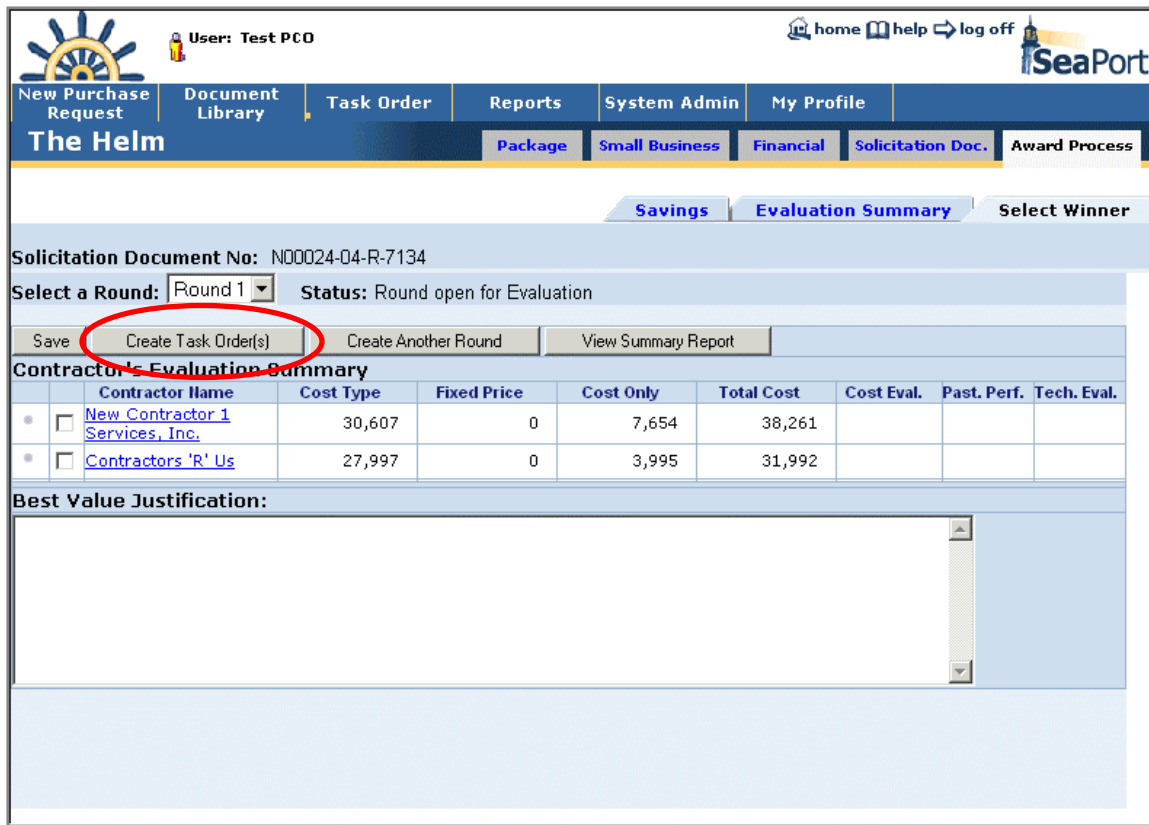


Figure 115: Create Draft Task Order

4.2.2 Add Administrative data

The Administrative panel is used to enter administrative data including award information, contracts office information, contracting officer, task order manager, and some DD350 information. The Task Order is initially pre-populated with data from the Solicitation Document. It contains the following data fields and buttons.

Table 59: TO Administrative Panel - Fields







Field	Type	Description
Contractor's Name	Read Only	System generated.
MAC Contract No.	Read Only	System generated.
TO No.	Read Only	System generated.
Effective Date of Order	Dropdown	Enter a date using the month, day, and year dropdown lists.
Date PCO Signed	Dropdown	Enter a date using the month, day, and year dropdown lists
Contract Negotiator	Dropdown	Choose a Negotiator from the dropdown list. Use the  icon to see the selected Negotiator's SeaPort profile. Use the  icon to choose from a list of all Negotiators in the system.
Contractor's Signature on File	Radio	Choose Yes or No.
PCO Name	Dropdown	Choose a PCO from the dropdown list. Use the  icon to see the selected PCO's SeaPort profile. Use the  icon to choose from a list of all PCOs in the system.
TOM Name	Dropdown	Choose a TOM from the dropdown list. Use the  icon to see the selected TOM's SeaPort profile. Use the  icon to choose from a list of all TOMs in the system.
PR Number	Read Only	System generated.
DD350 Required	Radio	Choose Yes or No

Table 60: TO Administrative Panel - Buttons

Button	Description
Save	Press the <i>Save</i> button to update information in the database. If the <i>Save</i> button is not pressed before leaving this screen, any newly entered information will be lost.
Validate TO	Press the <i>Validate TO</i> button to ensure that all required fields have been entered. If all required fields have not been entered, the system notifies user of an error condition and this notification will be in the form of a message window indicating the missing fields.
Route	Press the <i>Route</i> button to route the document to other users for input before finalizing it.
Execute TO	Press the <i>Execute TO</i> button to create a digital signature and final version of the Task Order.
Create PDF	Press the <i>Create PDF</i> button at any time to print the Task Order in Adobe PDF format for printing and review purposes. The word "Draft" will appear at the top of each page.

NOTE: The Save, Validate TO, Execute TO, and Route buttons are common to several of the TO panels. They always perform the same function.



User: Test PCO

home help log off

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm | Package | Small Business | Task Order

Save | Validate TO | Execute TO

Task Order Number: N00024-01-D-7013-0001

Award Information

Contractor's Name: Decatur Services, Inc.

MAC Contract No.: N00024-01-D-7013 | TO No.: N00024-01-D-7013-0001

Effective Date of Order: [] [] []

Date PCO Signed: [] [] []

Issuing Contracts Office

Contract Negotiator: Field PCO

Contractor's Signature on File: Yes No

Procuring Contracting Officer

PCO Name: Field PCO

Task Order Manager

TOM Name: Test PCO

PR Number

PR Number: N00024-04-NR-00104

DD350

DD350 Required: Yes No

Figure 116: TO – Administrative

4.2.3 Add Pricing Structure data

The Pricing Structure panel of the Task Order is the same as in the Purchase Request and in the Solicitation Document. It is used to enter CLIN and SLIN information. Pricing information can be added, deleted, or modified from this panel. It contains the following data fields and buttons.

Table 61: TO Pricing Structure Panel - Fields

Field	Type	Description
Amount of Task Order	Read Only	System Generated.
Financial Review Required?	Radio	Choose Yes or No.
All SLINs Approved?	Radio	Choose Yes or No.
New CLIN Window		
CLIN ID	Dropdown	Choose from 0001 - 0009. Each CLIN ID corresponds to a specific cost type and period of performance. See table in FIGURE.
Short Description	Text Box	Enter a short description for the CLIN up to 1000 characters.
New SLIN Window		
SLIN ID #	Text Box	Enter a valid 2-letter combination.
Fund Type	Dropdown	Choose from the list. See table in FIGURE.
FMS Case Number	Text Box	Enter the case number in the format AA-A-AAA.
Firm or Option	Dropdown	Choose Firm or Option.
Fee Type	Dropdown	Choose Fixed, Award, or Incentive.
Unit of Issue	Dropdown	Choose Labor Hours, Lot, or Labor Years.
Fiscal Year	Dropdown	Choose the last 2 digits of the fiscal year from the dropdown list.
Cost Plus Fee	Text Box	Enter the dollar amount. (14 digit limit)
Quantity	Text Box	Enter the quantity. (9 digit limit)
Recurring Cost	Radio	Choose Yes or No.
Performance Based	Radio	Choose Yes or No.
Unit Price	Read Only	This field is calculated based on other data.
Period of Performance	Dropdown	Choose From and To dates using the dropdown lists.
Short Description	Text Box	Enter a short description of the SLIN up to 1000 characters.

Table 62: TO Pricing Structure Panel - Buttons

Button	Description
New CLIN	<p>Click the <i>New CLIN</i> button to add a contract line item number (CLIN). You must also enter a short description for the CLIN. After saving the CLIN, you can then add its associated SLINs.</p> <p>When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.</p>
Timeline...	Opens the Timeline window described in Section 2.2.4.4.
Expand CLINs	Allows the user to see all SLINS associated with a CLIN. CLINS are presented with the details collapsed when the page length exceeds the system-defined limit (this is rare).

User: Test PCO

home help log off

SeaPort

New Purchase Request | Document Library | **Task Order** | Reports | System Admin | My Profile

The Helm | Package | Small Business | Task Order

Administrative | **Pricing Structure** | Requirements | Attachments | Negotiators | DD350 | Performance Based

Save | Validate TO | Execute TO

Task Order Number: N00024-01-D-7013-0001

Amount of Task Order	0
Financial Review Required?	<input checked="" type="radio"/> Yes <input type="radio"/> No
All SLINs Approved?	<input type="radio"/> Yes <input checked="" type="radio"/> No

CLIN

New CLIN | CLIN/SLIN Wizard | Timeline...

0002 0008 | Expand CLINs

ID	F or O	Fund Type	FY	Rec	Neg. Qty	Prop. Dollar Value	Neg. Dollar Value	Short Description	Actions
0002		Firm Fixed Price						all for one	[Icons]
0008		Firm Fixed Price						"	[Icons]
Grand Total:									

Figure 117: TO – Pricing Structure

4.2.3.1 New CLIN

Selecting the *New CLIN* button will open the following window as a pop up.

Valid CLINS are:

Cost Type:	0001, 0004, and 0007
Firm Fixed Price:	0002, 0005, and 0008
Cost Only:	0003, 0006, and 0009

Period of Performance for each CLIN is as follows:

CLINS	Period of Performance
0001	01-APR-01 TO 31-MAR-06
0002	01-APR-01 TO 31-MAR-06
0003	01-APR-01 TO 31-MAR-06
0004	01-APR-06 TO 31-MAR-11
0005	01-APR-06 TO 31-MAR-11
0006	01-APR-06 TO 31-MAR-11
0007	01-APR-11 TO 31-MAR-16
0008	01-APR-11 TO 31-MAR-16
0009	01-APR-11 TO 31-MAR-16

Figure 118: TO - New CLIN

4.2.3.2 New SLIN

A SLIN is a sub line item. CLINS are comprised of SLINS. To create a new SLIN, a CLIN must first be created.

Selecting the icon on the SLIN line opens the New SLIN page.

The image below shows the New SLIN page. A separate SLIN is required for each appropriation type of fund, each fiscal year, and each option.

NOTE: When adding the first CPFF CLIN, the system will automatically add the first CPFF SLIN and the first Cost Only CLIN and SLIN. You can then edit those entries to complete their required fields.

SLIN

SLIN I.D.#	0001	Fund Type	FMS	FMS Case No.	
Firm or Option	Firm <input type="checkbox"/> Award Term	Fee Type	Fixed	Unit of Issue	Labor Hours
Fiscal Year	04	Cost Plus Fee		Quantity	
Recurring Cost	<input checked="" type="radio"/> Yes <input type="radio"/> No	Performance Based	<input type="radio"/> Yes <input checked="" type="radio"/> No	Unit Price	0
Period of Performance		From:	September 25 2002		
		To:	September 24 2003		
Short Description					

Figure 119: TO - New SLIN

4.2.3.3 Edit a SLIN

After a SLIN is created, the information may be edited. Editing a SLIN also allows more data to be entered. In addition to the Main tab, there are Negotiation, Funding, LLA and Approval.

4.2.3.3.1 Main

The Main tab allows the user to edit information that was entered when the SLIN was created.

SLIN

SLIN I.D.#	0001 AA	Fund Type	OPN	FMS Case No.	
Firm or Option	Firm	Fiscal Year	04	Fee Type	Fixed
Recurring Cost	<input type="radio"/> Yes <input checked="" type="radio"/> No	Performance Based	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Service Contract Act Applicable	<input type="radio"/> Yes <input checked="" type="radio"/> No				
Period of Performance		From:	March 26 2005		
		To:	March 25 2006		
Short Description	Short Description				

Figure 120: TO - Edit SLIN - Main

4.2.3.3.2 Negotiation

The Negotiation tab contains Estimated, Proposed, Target, and Negotiated pricing information. The Estimated pricing information comes from the Solicitation Document. The Proposed pricing information comes from the contractor. The Target pricing information is an internal number based on the proposal. The Negotiated pricing information is the final price that is negotiated with the contractor.

	Estimated	Proposed	Target	Negotiated
Unit of Issue	Labor Hours			
Quantity	3	3	0	3
Estimated Cost	0	5,495	0	5495
Fixed Fee	0	6,000	0	6000 109.19%
Cost Plus Fee	2,000	11,495		11,495

Figure 121: TO - Edit SLIN - Negotiation

4.2.3.3.3 Funding

The Funding tab pulls the negotiated amounts. The funding amount fields are cumulative amounts. The *Fully Fund* button will fully fund the SLIN, and will automatically allocate the funding between cost and fee. Correct incremental funding will be reflected on the resulting DD350. Type into the text fields to enter funding information manually.

Negotiated Cost + Fixed Fee			
Total Potential		11,495	
Cost		5,495	
Fixed Fee		6,000	109.19%
Cumulative Funded Amount		0	
Cost		0	
Fixed Fee		0	
Total Resultant Funding			



Figure 122: TO - Edit SLIN - Funding

4.2.3.3.4 LLA (Long Line of Accounting)

If LLA (Long Line of Accounting) information is in the LUNAR system, it will be pulled down and reflected here. The LLA information needs to be entered for the Task Order to be executed. If a PR number was generated outside the system, it will be entered here.

Figure 123: TO - Edit SLIN - LLA

4.2.4 Add Requirements data

The Task Order Requirements Panel is the same as the Solicitation Document Requirements panel. It consists of links (noted in blue text). Blank icons  reveal text Sections with no data entered. Filled icons  reveal Sections with existing data. The following sections are available from the Requirements page.

- Comments
- General Information
- Supply and Services

- Section B Text
- Section C Statement of Work
- Section D Packaging and Marking
- Section E Inspection and Acceptance
- Section F Deliveries or Performance
- Section G Accounting Data
- Section G Contract Administration Data
- Section H Special Contract Requirements
- Section I Contract Clauses
- Section J List of Attachments

Selecting any of these links will bring up a window in which to enter text. An example of such a window is found in Figure 125. Table 63 and Table 64 below detail the fields and buttons contained on the entry forms.


The Requirements panel is used to enter requirements data. It contains the following data fields and buttons.

Table 63: TO Requirements Panel - Fields

Field	Type	Description
Text Entry	Text Box	Enter the text of the Requirement.
[[--preformatted-On--]]	Command	"Typewriter" mode. Each space and carriage return in the textbox appears verbatim in the PDF. Lines do not wrap.
[[--preformatted-Off--]]	Command	Resume "wrapping" long lines to form paragraphs.
[[--table--]]	Command	The following lines constitute a table, with a Tab between cells.
Commercial/Special	Radio	Choose Commercial or Special. Only available in Section D Packaging and Marking.

Table 64: TO Requirements Panel - Buttons

Button	Description
Save	Saves the text in the text area.
Save & Close	Saves the text in the text area and closes the window.
Preview	Brings up another window that displays the text as it will appear in the PDF document. (This is especially useful when using the formatting commands)

Button	Description
Pin...	Brings up a window where the system's automatic fill-ins (e.g., number of hours, SLINs are fully-funded, etc., etc.) are marked with a checkbox. If you need to "freeze" any of those substitutions so it becomes plain text and ceases to automatically update, checkmark it and press Save. Fill-ins that you leave unchecked will continue to update automatically.
Help	Brings up the Help system in a separate window.
Cancel	Closes the window without saving changes.
View Templates	Represented by the icon  . Opens a pop up window that contains all templates. Text can be copied from a template into the requirement page. This icon only appears on Requirements pages that have templates created for them.

The screenshot shows the 'SeaPort' application interface. At the top, the user is identified as 'Test PCO'. The main navigation bar includes 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. Below this, the 'The Helm' section is active, with sub-tabs for 'Package', 'Small Business', and 'Task Order'. On the left, a vertical menu lists various options: 'Administrative', 'Pricing Structure', 'Requirements' (highlighted), 'Attachments', 'Negotiators', 'DD350', and 'Performance Based'. The main content area features 'Validate TO' and 'Execute TO' buttons, followed by the 'Task Order Number: N00024-01-D-7013-0001'. A list of sections follows, each with a document icon and a blue link: 'Comments', 'General Information', 'Supply and Services', 'Section B Text', 'Section C Statement of Work', 'Section D Packaging and Marking', 'Section E Inspection and Acceptance', 'Section F Deliveries or Performance', 'Section G Accounting Data', 'Section G Contract Administration Data', 'Section H Special Contract Requirements', 'Section I Contract Clauses', and 'Section J List of Attachments'.

Figure 124: TO - Requirements

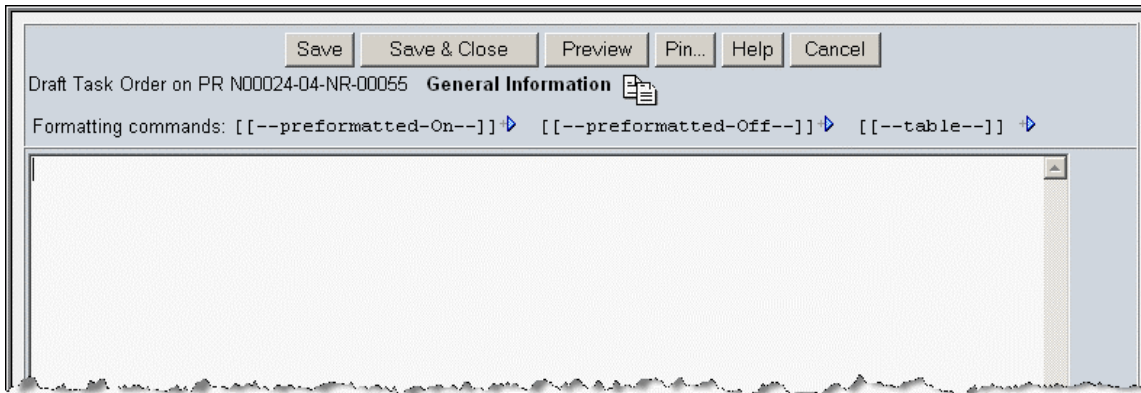




Figure 125: TO - Requirements Detail

4.2.5 Add Attachments

The Attachments panel is the same in PR, SD, and TO. Users are able to attach any electronic files to the Task Order that may apply. For example, drawings, specifications, organizational structures, or background information may all be attached at the Attachments Panel. To add a new attachment, the user should select the *New* button. By selecting *Browse* on the following screen, the user is able to browse through their files, either locally, a network, or on desk, using a browser. Upon finding the file you wish to attach, double click on the file or click *Open*. Enter a description, e.g, "Milestone Timeline" in the text box. The *Save* button returns the user to the main Attachment screen. Under the Actions column, the user can click the edit icon  to edit the Purpose text or the trashcan icon  to delete an attachment.

NOTE: If you want to update an attachment that has already been added, you will need to delete the original and then upload the newer version of the file.



The Attachments panel is used to add attachments to the Task Order. It contains the following data fields and buttons.

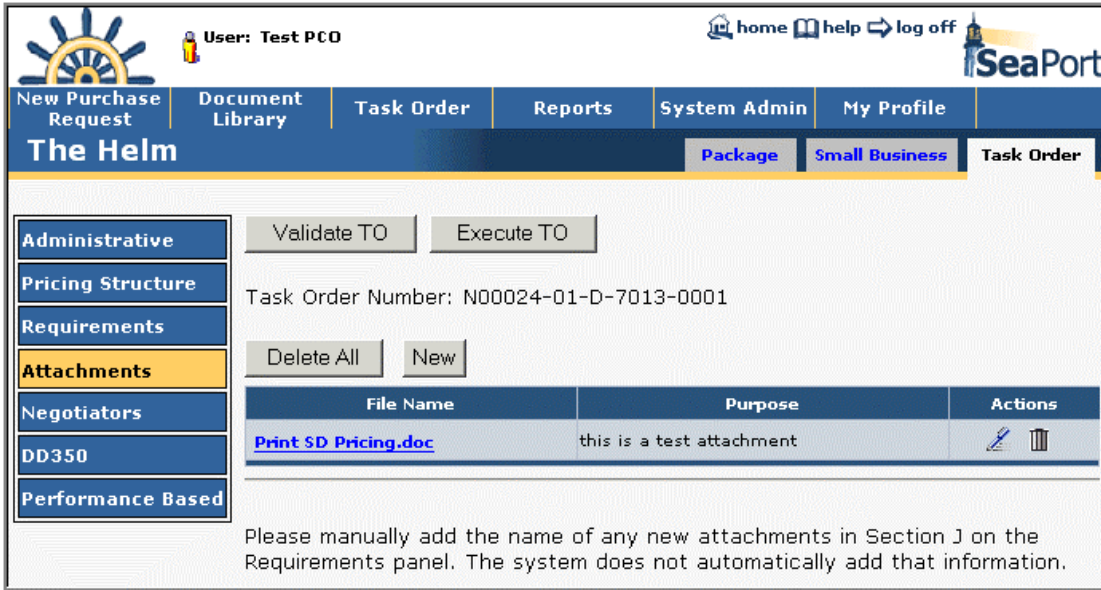
Table 65: TO Attachments Panel - Fields

Field	Type	Description
Filename	Link	The attachment's filename. Selecting this link will download the attachment. You will be prompted to either save or open the attachment depending on the attachment type.
Purpose	Read Only	The Purpose text that was entered when the attachment was saved.

Table 66: TO Attachments Panel - Buttons

Button	Description
Delete All	Delete All attachments in the list.
New	Add a new attachment.

Button	Description
Edit	Represented by the icon  , the attachment's Purpose text can be edited.
Delete	Represented by the icon  , the attachment can be deleted.
Save	Save the attachment and return to the Attachments panel.
Cancel	Return to the Attachments panel without saving the attachment.
Browse	Browse your computer for a file.



User: Test PC0

home help log off

New Purchase Request | Document Library | **Task Order** | Reports | System Admin | My Profile



The Helm | Package | Small Business | Task Order

Administrative | Pricing Structure | Requirements | **Attachments** | Negotiators | DD350 | Performance Based

Validate TO | Execute TO

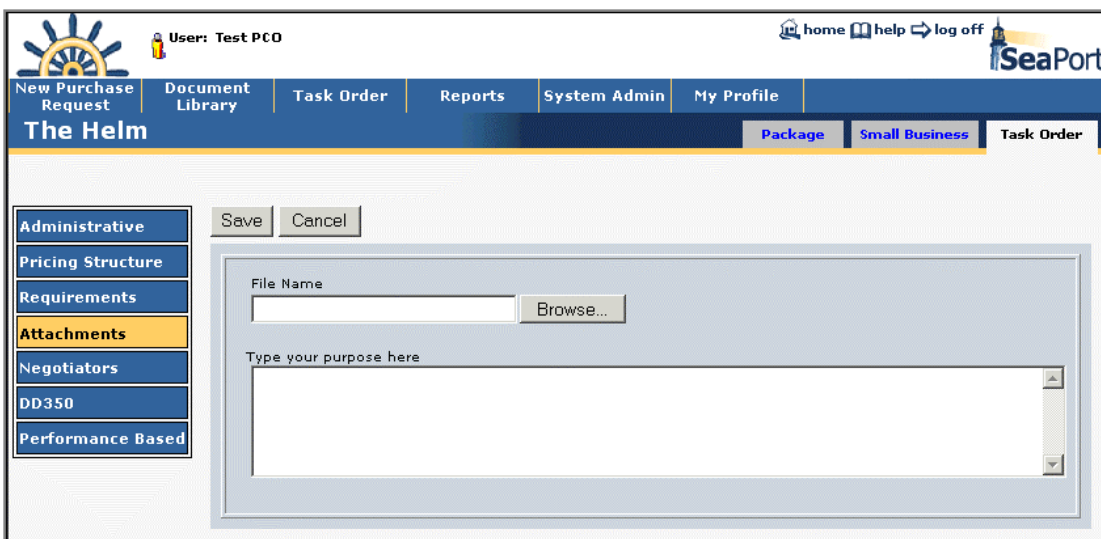
Task Order Number: N00024-01-D-7013-0001

Delete All | New

File Name	Purpose	Actions
Print SD Pricing.doc	this is a test attachment	 

Please manually add the name of any new attachments in Section J on the Requirements panel. The system does not automatically add that information.

Figure 126: TO – Attachments



User: Test PC0

home help log off

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm | Package | Small Business | Task Order

Administrative | Pricing Structure | Requirements | **Attachments** | Negotiators | DD350 | Performance Based

Save | Cancel

File Name


Type your purpose here

Figure 127: TO - Attachments - Add Attachment

4.2.6 Add Negotiators data

The Negotiators panel is the same as in the Solicitation Document. It lists all negotiators that have been added to the Task Order. Negotiators can be added to or removed from this list. The controls featured on this page are described in Table 67 below.

Table 67: TO Negotiators Panel - Buttons

Button	Description
Add To The List	Clicking this button will add the selected Negotiator's name to the list above.
Remove	Selecting this icon  will remove the Negotiator's name from the list.

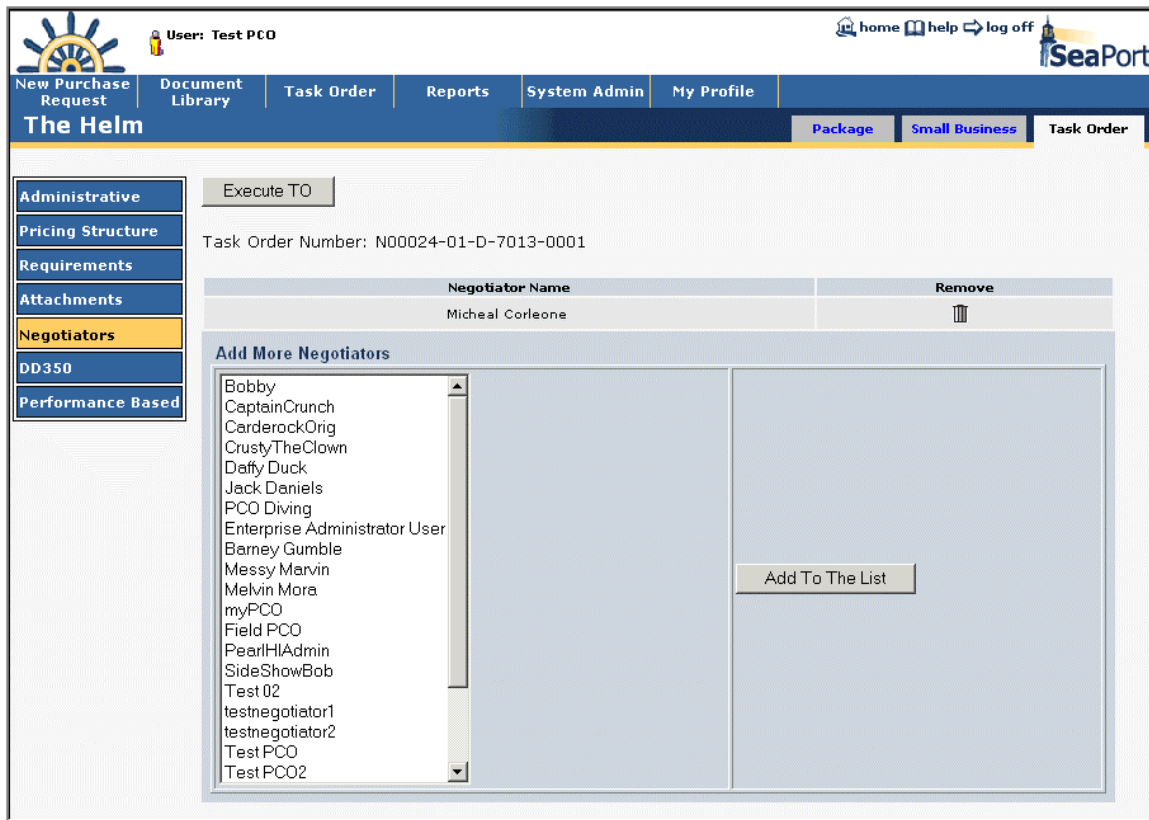


Figure 128: TO - Negotiators

4.2.7 Add DD350 data

The DD350 panel is used to enter DD350 information. It contains the following data fields and buttons.

NOTE: There is an option on the Admin panel not to send DD350 data. If this option is selected, users will not see the DD350 link in the left navigation and will not have access to the DD350 panel.

Table 68: TO DD350 Panel - Fields

Field	Type	Description
Contractor's Name	Read Only	System Generated based on the contractor selected during the Award Determination process.
MAC Contract No.	Read Only	System generated.
Obl/DeObl FMS Amt	Read Only	System generated. This information is driven from the pricing and funding information. The abbreviations used are: <ul style="list-style-type: none"> ■ Obl – obligate ■ Deobl – deobligate ■ FMS – foreign military sales This information gets reported in the DD350
Obl/DeObl Non-FMS Amt	Read Only	System generated. This information is driven from the pricing and funding information.
Contracting Office Code	Dropdown	Choose a code from the dropdown list.
FSC or SVC Code	Dropdown	Choose a code from the dropdown list.
Program, System, or Equip. Code	Dropdown	Choose a code from the dropdown list.
Modification	Read Only	System generated.
Location of Work	Radio	Select <i>Choose</i> or <i>Other</i> . Selecting the <i>Other</i> link will open the FIPS 55-DC3 Index in a separate browser window.
City and State	Dropdown	Select the city and state where the work will be performed from the dropdown list.
Reason Not Awarded to SDB	Dropdown	Choose a reason from the dropdown list.
Reason Not Awarded to SB	Dropdown	Choose a reason from the dropdown list.

Figure 129: TO – DD350

NOTE: The PCO should carefully check the Obl/DeObl FMS Amt and the Obl/DeObl Non-FMS Amt before a TO is executed.

4.2.8 Add Performance Based data

The Performance Based panel is used to enter performance data. It contains the following data fields and buttons.

NOTE: The information entered here is what will be reflected in the DD350. Make sure to classify the TO as Performance-Based or Non Performance-Based so that the DD350 will be correct.

Table 69: TO Performance Based Panel - Fields

Field	Type	Description
Performance Based	Radio	Choose Yes or No.
Justification	Text Box	Enter the Justification for not structuring your Task Order to be performance-based.

The screenshot shows the SeaPort-e web interface. At the top, there is a navigation bar with links for 'home', 'help', and 'log off'. The user is identified as 'Test PCO'. Below this is a main menu with tabs for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Task Order' tab is active, and within it, the 'Small Business' sub-tab is selected. The main content area is titled 'The Helm' and contains a sidebar with menu items: 'Administrative', 'Pricing Structure', 'Requirements', 'Attachments', 'Negotiators', 'DD350', and 'Performance Based' (which is highlighted). The main form area has 'Save' and 'Execute TO' buttons. Below these buttons, the 'Task Order Number' is displayed as 'N00024-01-D-7013-0001'. The form is divided into two sections: 'Performance Based' and 'Justification'. The 'Performance Based' section contains two radio buttons, 'Yes' and 'No', with 'No' selected. The 'Justification' section is a large empty text area with a vertical scrollbar on the right.

Figure 130: TO – Performance Based

4.2.9 Small Business

The Subcontracting Plan Review form is available from the Small Business tab of the draft Task Order. It is the same as the paper form used now.

SeaPort User: Test PCO home help log off

New Purchase Request | Document Library | **Task Order** | Reports | System Admin | My Profile

The Helm Package | Small Business | **Task Order**

Subcontracting Plan

Subcontracting Plan Review

Type of Plan:

Individual Plan
 Master Plan
 Comprehensive Plan
 Commercial Plan
Note: If this is a comprehensive or master plan, no further review is necessary.

Review of Subcontracting Plan	Contract Specialist Acceptable	DSB Acceptable
a. Has the offeror provided subcontracting goals for: Small Business Concerns (SB) <input type="text"/> % \$ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Veteran-Owned Small Business Concerns (VOSB) <input type="text"/> % \$ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Service-Disabled Veteran-Owned Small Business Concerns (SDVOSB) <input type="text"/> % \$ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
HUBZone Small Business Concerns (HUBZSB) <input type="text"/> % \$ <input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Figure 131: Small Business – Subcontracting Plan Review

Once the Task Order has been executed, the Subcontracting Goals and Actuals form is available to the PCO. It is shown in Figure 132 below. Goals are entered from the subcontracting plan. Actuals are entered each half - as they become available. The form will generate the current average. Comments are entered by the PCO.

User: Test PCO

[home](#) [help](#) [log off](#)

New Purchase Request
Document Library
Task Order
Reports
System Admin
My Profile

The Helm
Package
Small Business
Financial
Task Order
Perf. Eval.

Set Aside

Subcontracting Plan

Subcontracting Goals

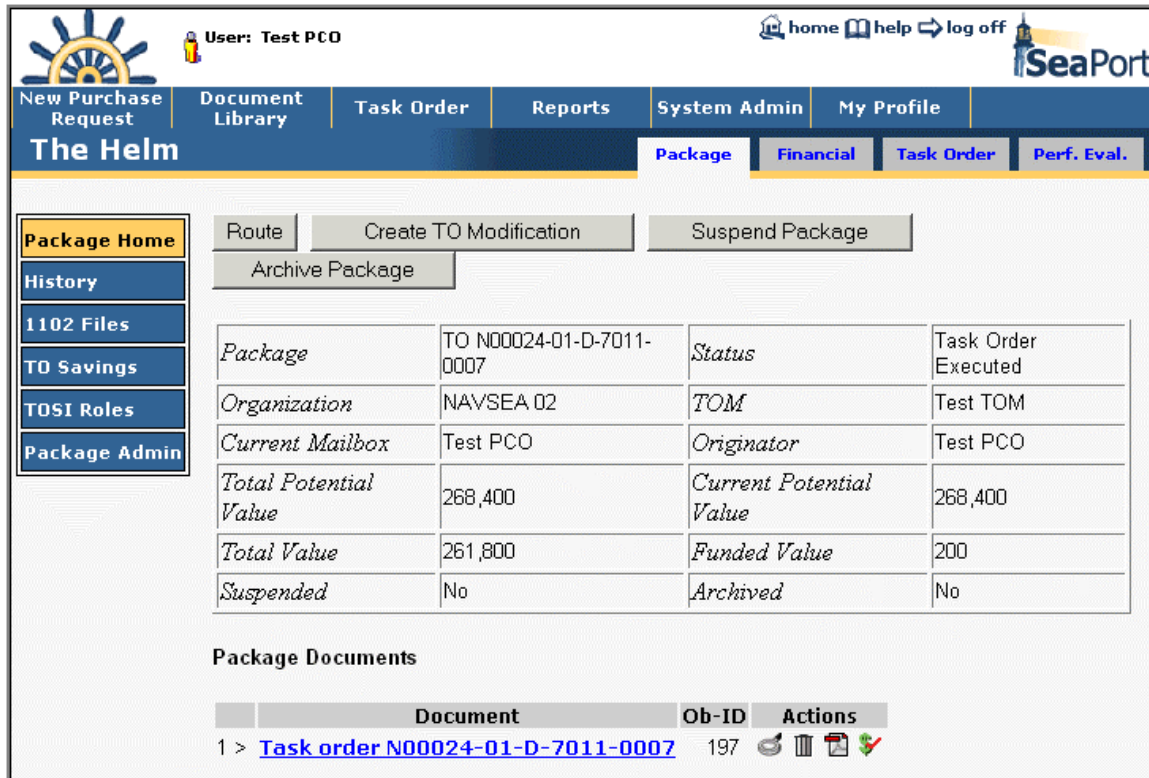
Subcontracting Goals and Actuals						
	Small Business Concerns	Veteran-Owned Small Business Concerns	Service-Disabled Veteran-Owned Small Business Concerns	HUBZone Small Business Concerns	Small Disadvantaged Business Concerns	Women-Owned Small Business Concerns
Original Goals	% \$	% \$	% \$	% \$	% \$	% \$
2003 1st Half	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>
2003 2nd Half	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>
2004 1st Half	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>	<input type="text" value="0"/> % <input type="text" value="\$0"/>
Current Average	0%	0%	0%	0%	0%	0%

Comments:

Figure 132: Small Business - Subcontracting Goals and Actuals

4.2.10 Task Order Modification Process

If a Task Order modification needs to be created, the PCO chooses the specific package from the Document Library and presses the *Create TO Modification* button from the Package Home Page as shown below.



The screenshot shows the SeaPort application interface. At the top, the user is identified as 'Test PCO'. The main navigation bar includes 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. Below this, a secondary bar highlights 'The Helm' and includes sub-tabs for 'Package', 'Financial', 'Task Order', and 'Perf. Eval.'. On the left, a sidebar contains 'Package Home', 'History', '1102 Files', 'TO Savings', 'TOSI Roles', and 'Package Admin'. The main content area features buttons for 'Route', 'Create TO Modification', 'Suspend Package', and 'Archive Package'. A data table displays details for a Task Order modification.

<i>Package</i>	TO N00024-01-D-7011-0007	<i>Status</i>	Task Order Executed
<i>Organization</i>	NAVSEA 02	<i>TOM</i>	Test TOM
<i>Current Mailbox</i>	Test PCO	<i>Originator</i>	Test PCO
<i>Total Potential Value</i>	268,400	<i>Current Potential Value</i>	268,400
<i>Total Value</i>	261,800	<i>Funded Value</i>	200
<i>Suspended</i>	No	<i>Archived</i>	No

Below the table, the 'Package Documents' section shows a table with columns for 'Document', 'Ob-ID', and 'Actions'. One document is listed: 'Task order N00024-01-D-7011-0007' with Ob-ID '197' and various action icons.

Figure 133: TO Modification - Create TO Modification Button

Upon pressing the *Create TO Modification* button the user is presented with the verification dialogue box shown in Figure 134 below.

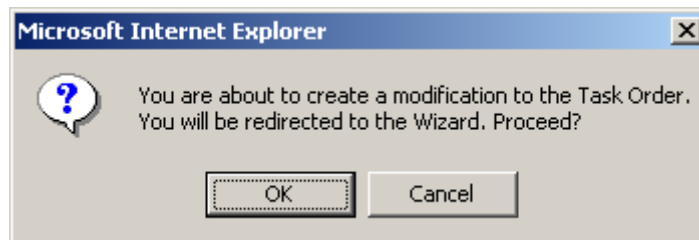


Figure 134: TO Modification - Verification Dialogue

If the user chooses to continue and create the modification, the system displays the following screen.

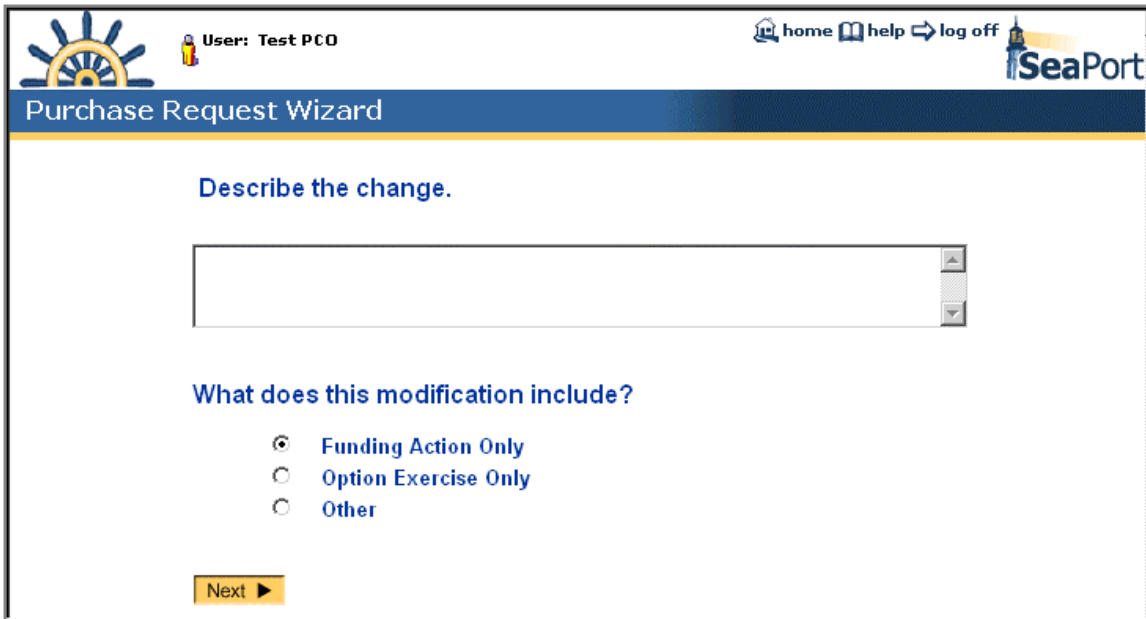


Figure 135: TO Modification - TO Modification Wizard Screen

The user enters a description of the change in the “Describe the change” text box, selects the appropriate radio button choice, and then presses the “Next” button. The system places the user on the Administrative panel in a draft task order modification document. From this point forward the process is identical to the task order process defined earlier in this document.

4.2.11 Add Task Performance Evaluation data

After executing a task order, the Performance Evaluation (Perf. Eval.) tab becomes available as shown in Figure 136.

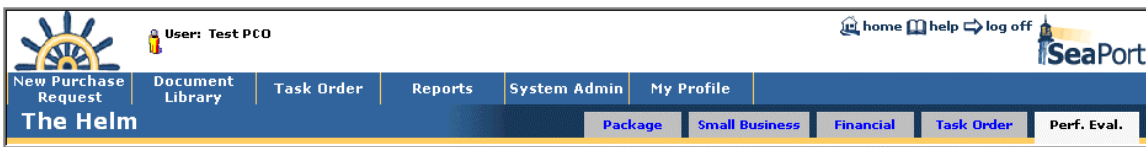
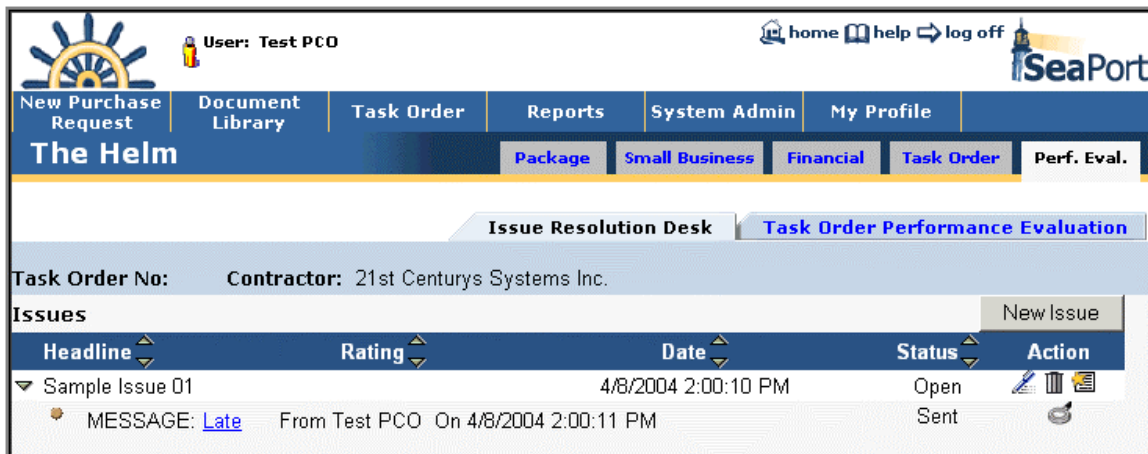


Figure 136: TO - Performance Evaluation Tab

4.2.11.1 Issue Resolution Desk (IRD)

The Issue Resolution Desk (IRD) is a means of communication between the contractor and the TOM. Issues are created from the Issue Resolution Desk tab shown in Figure 137 below, by clicking on the *New Issue* button.

Issues can be edited or deleted. New issues can be added under a new headline or as a follow up to an existing headline.



User: Test PCO

home help log off

SeaPort

New Purchase Request Document Library Task Order Reports System Admin My Profile

The Helm Package Small Business Financial Task Order Perf. Eval.

Issue Resolution Desk Task Order Performance Evaluation

Task Order No: Contractor: 21st Centurys Systems Inc.

Issues New Issue





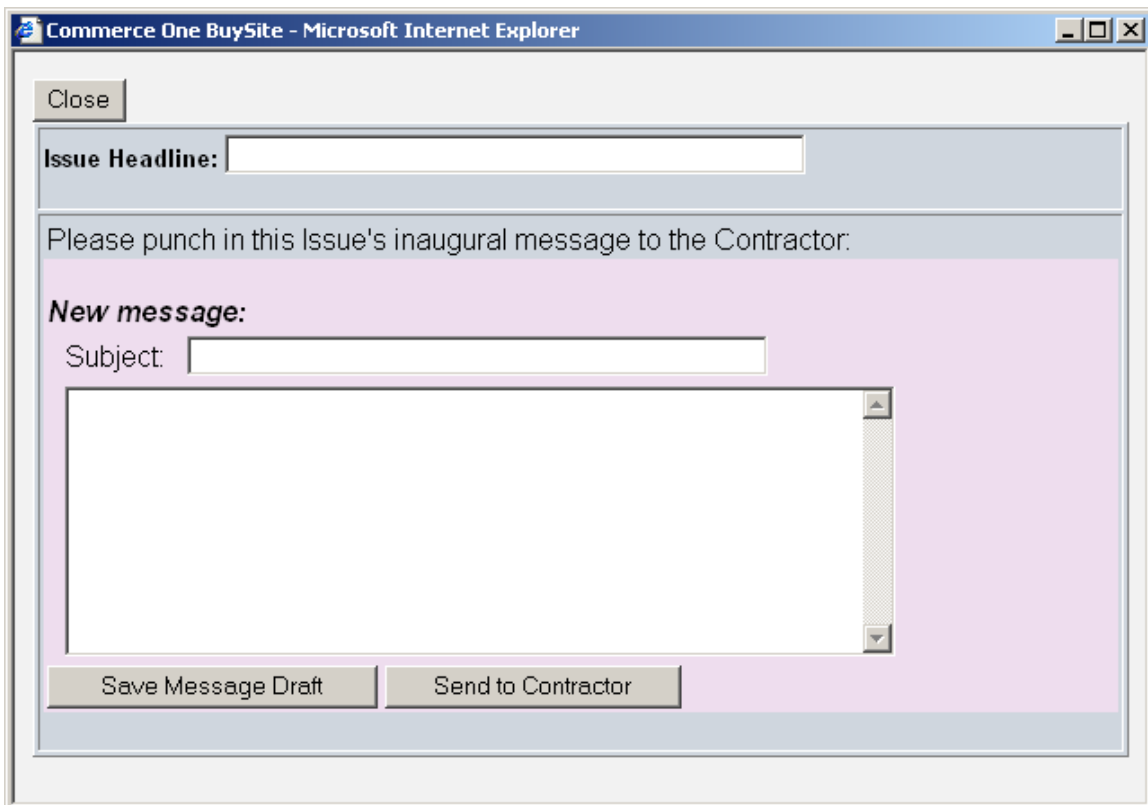
Headline	Rating	Date	Status	Action
Sample Issue 01		4/8/2004 2:00:10 PM	Open	  
MESSAGE: Late From Test PCO On 4/8/2004 2:00:11 PM Sent 				

Figure 137: Issue Resolution Desk

This will open the New Issue window shown in Figure 138. Issues created take the form of a threaded discussion between the contractor and the TOM. These are much like an Internet newsgroup.



Commerce One BuySite - Microsoft Internet Explorer

Close

Issue Headline:

Please punch in this Issue's inaugural message to the Contractor:

New message:

Subject:

Save Message Draft Send to Contractor

Figure 138: Issue Resolution Desk - New Issue Window

4.2.11.2 Task Order Performance Evaluation

When the first year of the Period of Performance is coming to an end, the TOM will get a notification to come into the system and perform a TOPE. The notification will contain a red carpet link to the Task Order. The TOM will select the Performance Evaluation tab and click the *New Evaluation* button as shown in Figure 139.

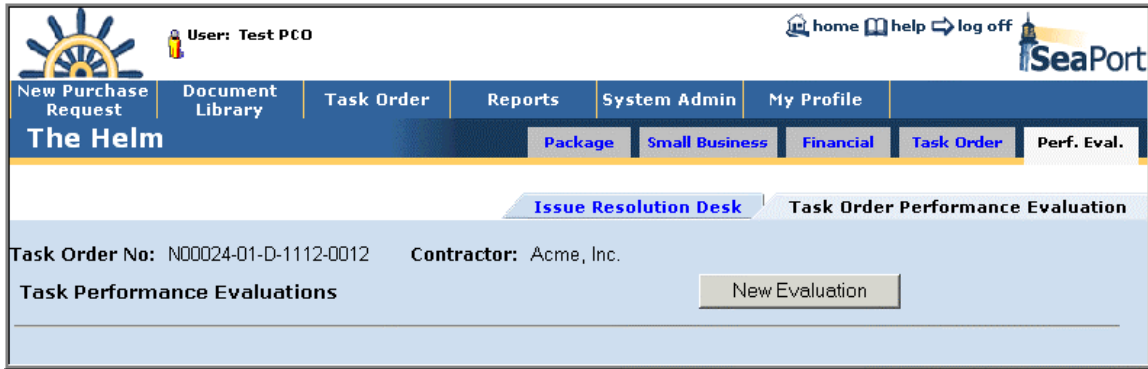


Figure 139: Task Order Performance Evaluation

A new evaluation form will pop up in a new window. This form is shown in Figure 140 below.

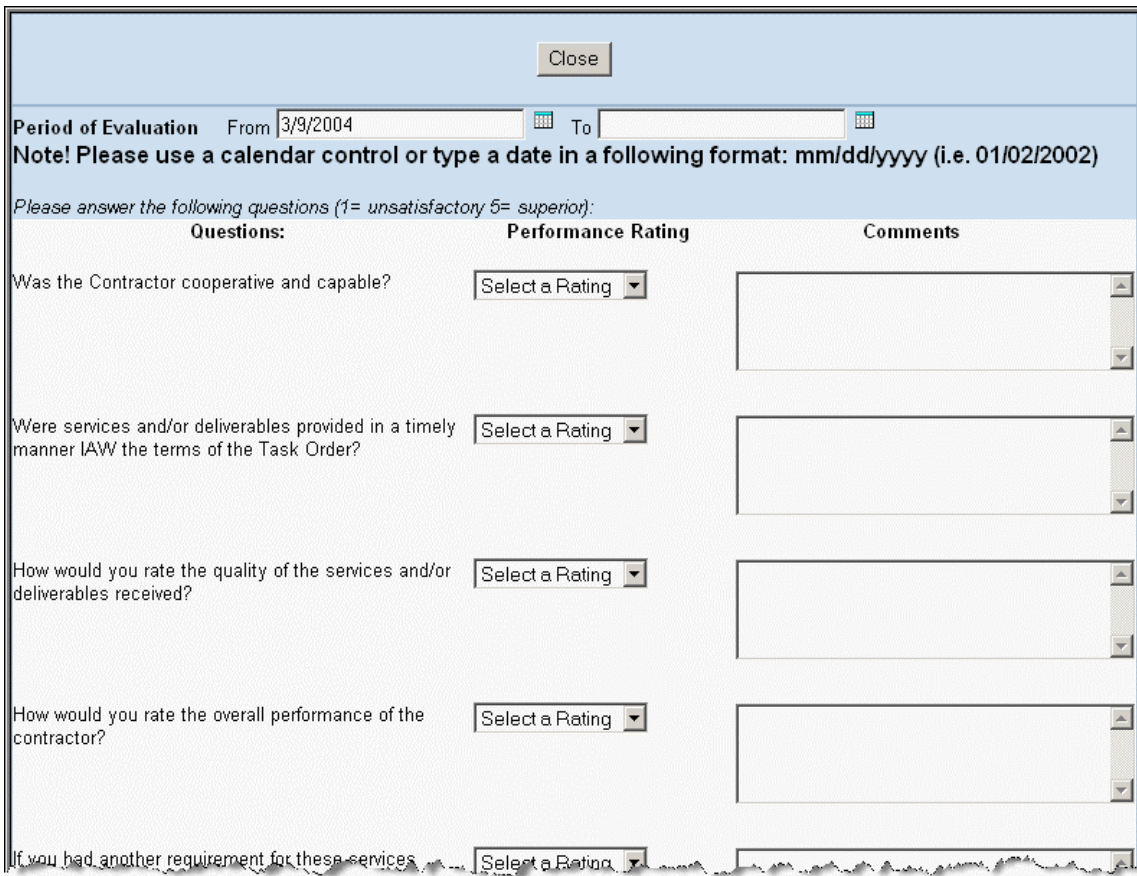


Figure 140: TOPE Form

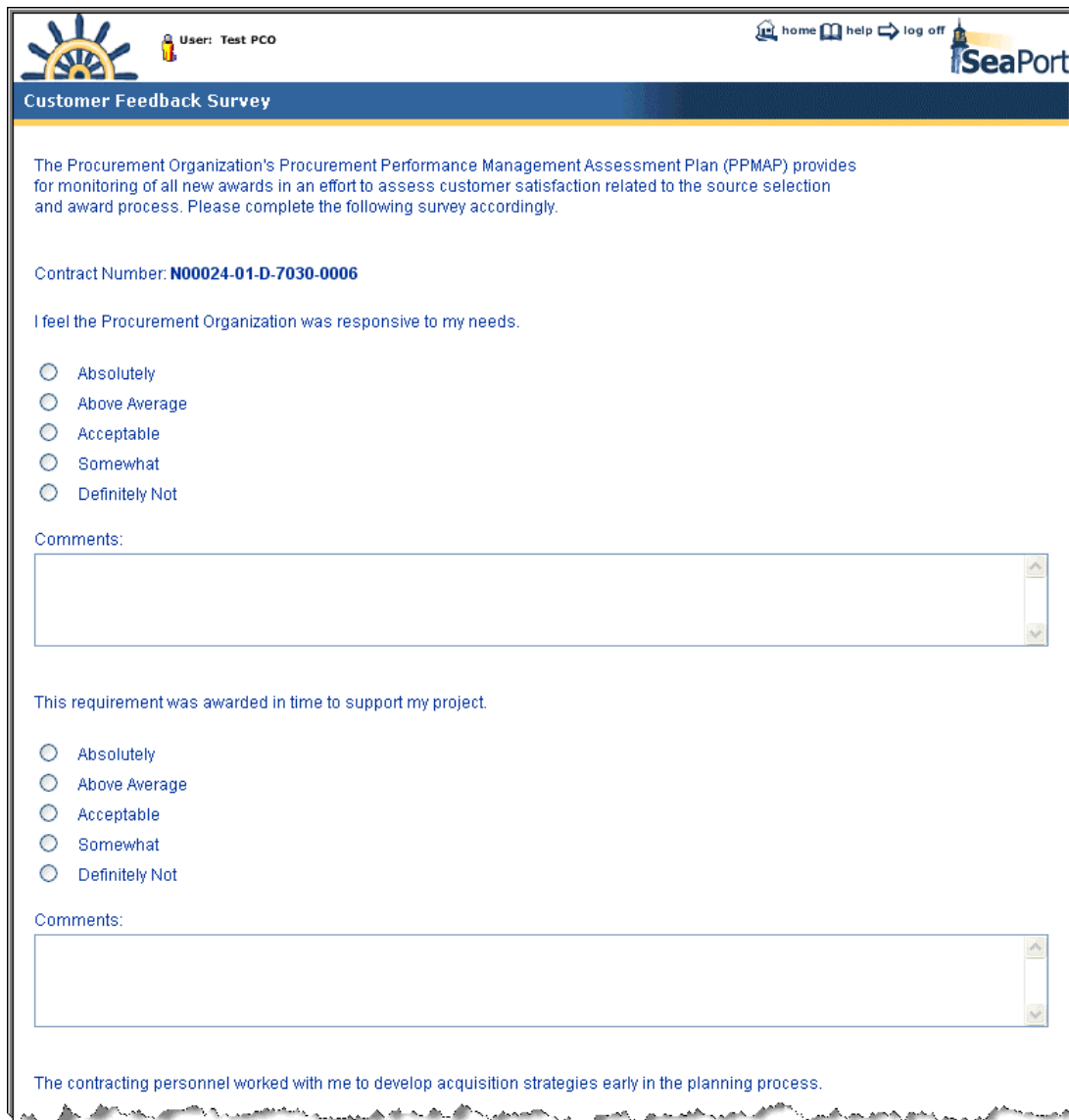
After completing the TOPE form, the TOM submits it to the contractor. The contractor has 30 days to respond. After 30 days the TOM can either lock the TOPE or revise it and re-submit it to the contractor. The contractor will have 30 days to respond to a revised TOPE. If the TOM locks the TOPE, it is read-only and no one else can revise it. The TOPE can be revised as many times as needed until it is locked. SeaPort will send a TOPE reminder at the end of each option year until the Task Order is completed.

4.2.12 Customer Satisfaction Survey

When executing a TO, a PCO selects users to send the Customer Satisfaction Survey notifications to. Email notification are sent to the following default users:

- Evaluator
- Chairman
- TOM
- Originator

A PCO can select additional users. Users get an email with a link to the Customer Satisfaction Survey. They can also access it through the Workflow Page. A Customer Satisfaction Survey is shown in Figure 141 below.



User: Test PCO

home help log off

SeaPort

Customer Feedback Survey

The Procurement Organization's Procurement Performance Management Assessment Plan (PPMAP) provides for monitoring of all new awards in an effort to assess customer satisfaction related to the source selection and award process. Please complete the following survey accordingly.

Contract Number: **N00024-01-D-7030-0006**

I feel the Procurement Organization was responsive to my needs.

Absolutely

Above Average

Acceptable

Somewhat

Definitely Not

Comments:

This requirement was awarded in time to support my project.

Absolutely

Above Average

Acceptable

Somewhat

Definitely Not

Comments:

The contracting personnel worked with me to develop acquisition strategies early in the planning process.

Figure 141: Customer Satisfaction Survey




4.3 Practice

Students will complete steps seven, eight, and nine of the Procurement Process described in Section 2.1.2 of the SeaPort II Training Plan. This involves selecting a winner, creating a draft TO, execution the TO and creating a TO modification.

Setup: A Task Order Draft is available from the Document Library.

Enter or modify the information that exists in the Task Order Draft using the data provided in the tables below.

Table 70: Task Order Data - Administrative

Field	Data
Contractor's Name	System generated and read only.
MAC Contract No.	System generated and read only.
TO No.	System generated and read only.
Effective Date of Order	Select a date using the dropdown lists.
Date PCO Signed	Select a date using the dropdown lists.
Issuing Contracts Office	
Contract Negotiator	Select a Contract Negotiator from the dropdown list or use the View All icon  to select from all Negotiators in the system.
Contractor's Signature on File	Select either choice.
PCO Name	Select a PCO from the dropdown list or use the View All icon  to select from all PCOs in the system.
TOM Name	Select a TOM from the dropdown list or use the View All icon  to select from all TOMs in the system.
PR Number	System generated and read only.
DD350 Required	Select either choice.

Use the left navigation to proceed to the Pricing Structure panel. Enter the information in the table below.



Table 71: Task Order Data - Pricing Structure

Field	Data
Amount of Task Order	System generated and read only.
New CLIN Window	
CLIN ID	Select a 001 from the dropdown list.
Short Description	Enter text in the Short Description textbox. Save.
New SLIN Window	
SLIN ID #	Enter a two-letter SLIN ID (i.e. AA, AB, BA, etc).
Fund Type	Select a Fund Type from the dropdown list.
FMS Case Number	Enter an FMS case number (format: AA-A-AAA)
Firm or Option	Select either Firm or Option.
Fee Type	Select a Fee Type form the dropdown list.
Unit of Issue	Select a Unit of Issue from the dropdown list.
Fiscal Year	Select a Fiscal year from the dropdown list.
Cost Plus Fee	Enter a number in the textbox.
Quantity	Enter a number in the textbox.
Recurring Cost	Select either choice.

Field	Data
Performance Based	Select either choice.
Unit Price	Select either choice.
Period of Performance	Use the dropdown list controls to enter a From and To date.
Short Description	Enter text in the Short Description textbox. Save.



Use the left navigation to proceed to the Requirements panel. Enter the information in the table below. Click the Requirement's link to enter text for a Requirement.

Table 72: Task Order Data - Requirements

Field	Data
 Blank Requirements	Blank Requirements are indicated by the empty document icon. Enter text or use a template to fill any blank requirements.
 Requirements containing data	Requirements containing data are indicated by the filled document icon. Modify several requirements either by typing into the text box or by selecting a template.


Use the left navigation to proceed to the Attachments panel. Enter the information in the table below.

Table 73: Task Order Data - Attachments

Field	Data
Attachment 1	Click the <i>New</i> button. Browse to the SampleFile1 and select it. Enter text into the Purpose text box.
Attachment 2	Click the <i>New</i> button. Browse to the SampleFile2 and select it. Enter text into the Purpose text box. Click the Edit icon  for Attachment 1 and change the Purpose text. Save the changes.
Attachment 3	Click the <i>New</i> button. Browse to the SampleFile3 and select it. Enter text into the Purpose text box. Click the Delete icon  to delete Attachment 2.

Use the left navigation to proceed to the Negotiators panel. Enter the information in the table below.

Table 74: Task Order Data - Negotiators

Field	Data
Add To The List	Select a Negotiator's name from the list on the left. Click the <i>Add To The List</i> button. Hold the Ctrl key down to select multiple Negotiators. Use the Shift key to select all Negotiators between your first and second selection. Add 5 Negotiators.
Remove	Delete 3 Negotiators by selecting the Delete icon  corresponding to their name.

Use the left navigation to proceed to the DD350 panel. Enter the information in the table below.

Table 75: Task Order Data – DD350

Field	Data
Contractor's Name	System generated and read only.
MAC Contract Number	System generated and read only.
Obl/DeObl FMS Amount	System generated and read only.
Obl/DeObl Non-FMS Amount	System generated and read only.
Contracting Office Code	Select from the dropdown list.
FSC or SVC Code	Select from the dropdown list.
Program System, or Equip Code	Select from the dropdown list.
Modification	System generated and read only.
Location of Work	Select from the dropdown list.
City and State	Select from the dropdown list.
Reason Not Awarded to SDB	Select from the dropdown list.
Reason Not Awarded to SB	Select from the dropdown list.

Use the left navigation to proceed to the Performance Based panel. Enter the information in the table below.

Table 76: Task Order Data – Performance Based

Field	Data
Performance Based	Select either choice.
Justification	Enter text in the Justification text box.

Validate TO

You have completed entering information for the Task Order. Use the Validate TO button to check your work. If validation is not successful, enter the missing information and validate again. Continue to validate the Task Order until you are successful.

Execute TO

Click the Execute TO button. The confirmation screen will be presented. Make no changes here.

Yes, Execute Task Order

Click the Yes, Execute Task Order button.

The Success screen is presented. View the Final PDF by clicking on the **final Task Order PDF** link. When the PDF file is ready, click on the **Your PDF** link to view the PDF file in Adobe Acrobat Reader.

4.4 Adjust

The instructor will evaluate the students' progress through the exercises above. Areas of particular difficulty will be reviewed and addressed as necessary.

5 Reports

This section details the Reports training session. The Reports training session follows the structure outlined in the SeaPort II Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

5.1 Reports Overview

SeaPort includes report-generation functionality and a small set of standard reports.

SeaPort administrators can develop custom site-specific reports. These can then be added to the SeaPort Reports menu page. See your SeaPort administrator for more information.

Currently SeaPort includes the following reports.

- SeaPort Status Report
- SeaPort Task Order Report
- SeaPort TimeStamp Report
- SeaPort Procurement Summary Report
- SeaPort TOPE Report
- SeaPort Issue Resolution Desk (IRD) Report
- SeaPort Option Expiration Report
- SeaPort TOSI Report
- SeaPort TOPE Scoring Summary Report
- SeaPort Executed Task Orders Report
- SeaPort Timestamp Per Package Report
- SeaPort Workload Report
- SeaPort TOPE Status Report
- SeaPort Small Business Report
- Customer Feedback Survey Report

NOTE: Not all users will have access to the same reports.

Do the following to select a report:

1. On the SeaPort home page, select Reports from the header navigation.
2. Click on the report title. This is a hyperlink that loads the selected report setup.
3. Some reports require further information. For example, you may need to select from a list of contractors, procurement types, or negotiators.
4. After selecting the appropriate parameters, click Submit.
5. SeaPort creates the report and displays it in a separate window.

NOTE: If the report is a standard report, it will be displayed using the Adobe Acrobat Reader. If it is a custom report developed with some other reporting tool, (e.g., Crystal Reports), it will be displayed using the appropriate viewer (e.g., Crystal Reports' viewer).


NOTE:  If the report you are running is a custom Crystal Reports report, you may save an electronic copy of the report by selecting the *Export Report* button and selecting an export format.



Figure 142: Reports - Reports List

5.2 SeaPort Status Report

The SeaPort Status Report is a top-level management report about SeaPort activity at the roll-up level. It displays information about all procurement packages and their state. Enter your report criteria to change the results that are reported. Practice PRs are excluded from the report.

Table 77: SeaPort Status Report Parameters

Field	Type	Data
On or After	Text Box	The report will show procurement documents processed on or after this date.
On or Before	Text Box	The report will show procurement documents processed on or before this date.
Amount - At Least	Text Box	The report will show procurement documents with a value that meets or exceeds the number entered here.
Amount - Less Than	Text Box	The report will show procurement documents with a value that is less than the number entered here.
Years - At Least	Text Box	The report will show procurement documents with a duration of at least the number of years entered here.
Years - Less Than	Text Box	The report will show procurement documents with a duration of less than the number of years entered here.

Figure 143: Reports - SeaPort Status Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

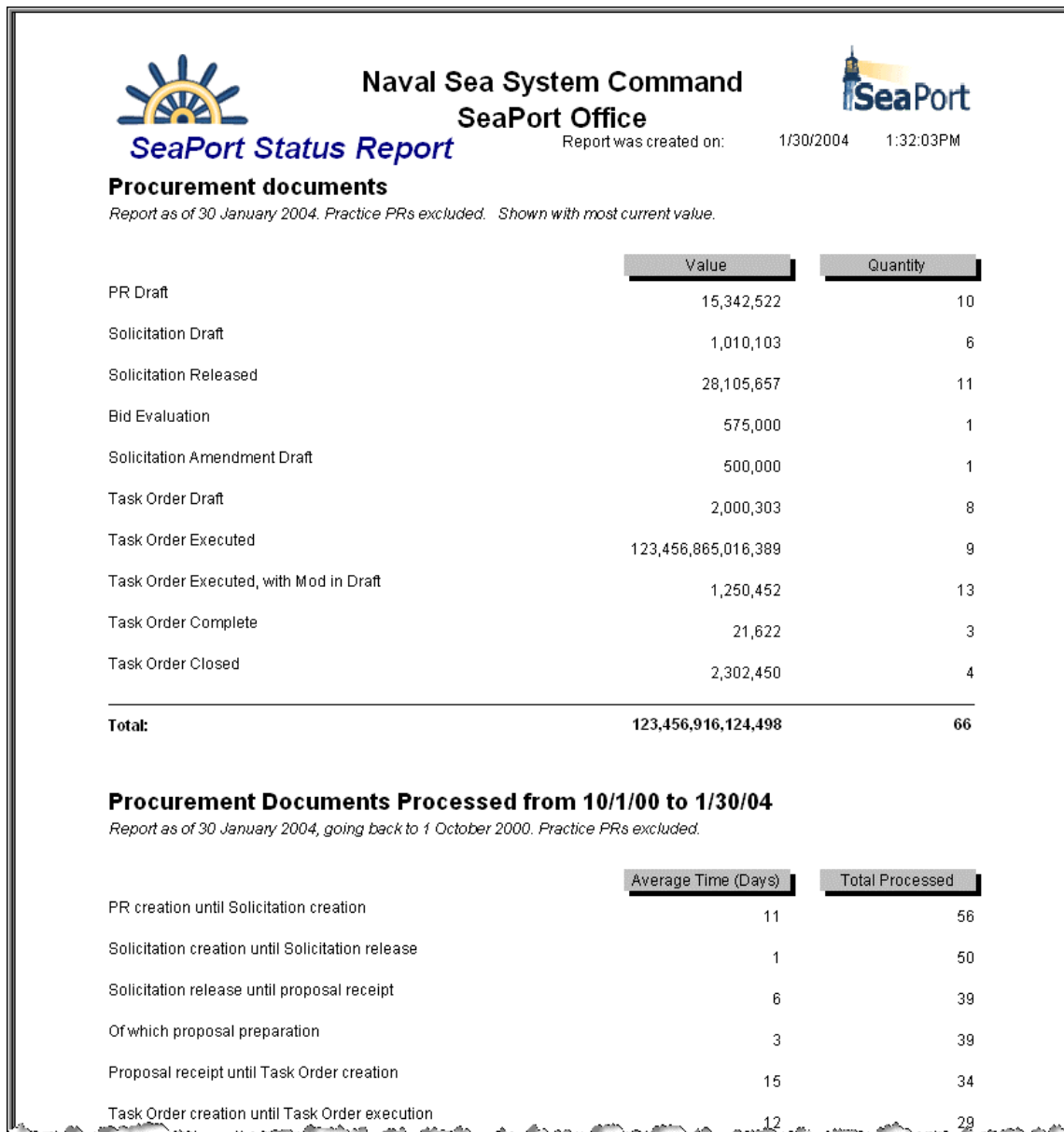




Figure 144: Reports - SeaPort Status Report

5.3 SeaPort Task Order Report

The SeaPort Task Order Report displays detailed potential and obligated value and execution dates for various Task Orders. Enter your report criteria to change the results that are reported.


Table 78: SeaPort Task Order Report Parameters

Field	Type	Data
Sort By	Dropdown	Sort the report by Contractor, Color of Money, or CLIN.
Value - More Than	Text Box	Only display task orders where the value is more than the number entered here.
Value - Less Than	Text Box	Only display task orders where the value is less than the number entered here.
Dated Between	Text Box	Only display task orders where the date executed is within the date range entered here. Enter the dates directly using the MM/DD/YYYY format or use the calendar icons  to choose a date.
Business Ownership	Dropdown	Only display task orders the selected Business Ownership type. Choose from 8A, HUB, SB, VET, or WO.
Awarded To	Dropdown	Only display task orders with the selected contractor. Choose a contractor from the dropdown list.
Status	Dropdown	Only display task orders with the selected Status. Choose Ongoing, Complete, or Closed.
Organization	Dropdown	Only display task orders with the selected organization. Choose an Organization from the list.
Procurement Type	Dropdown	Only display task orders with the selected Procurement Type. Choose Competitive or Sole Source.
Selection Criteria	Dropdown	Only display task orders with the selected Selection Criteria. Choose a Best Value or Low Cost Tech Acceptable.
SOW word or phrase	Text Box	Only display task orders where the SOW contains the text entered here.
Funding Type	Dropdown	Only display task orders with the selected Funding Type.
Containing CLINS	Check Box	Only display task orders containing CLINS.
Cost Type	Check Box	Only display task orders containing Cost Type CLINS.
FFP	Check Box	Only display task orders containing FFP CLINS.
Cost Only	Check Box	Only display task orders containing Cost Only CLINS.



User: Test PCO

[home](#) [help](#) [log off](#)



[New Purchase Request](#) | [Document Library](#) | [Task Order](#) | [Reports](#) | [System Admin](#) | [My Profile](#)

Report Parameters | [Parameters](#) | [SeaPort Reports Menu](#)

Task Order Reports requires the following parameters:

Give me all task orders sorted by

Where

- \$ Value is more than and less than
- Dated between and
- Business Ownership
- Awarded to
- Whose status is
- From Organization
- Of procurement type
- With selection criteria
- With SOW containing word or phrase
- With funding type
- Containing CLINs
 - Cost Type
 - FFP
 - Cost Only

Note: to select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.

Figure 145: Reports - Task Order Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

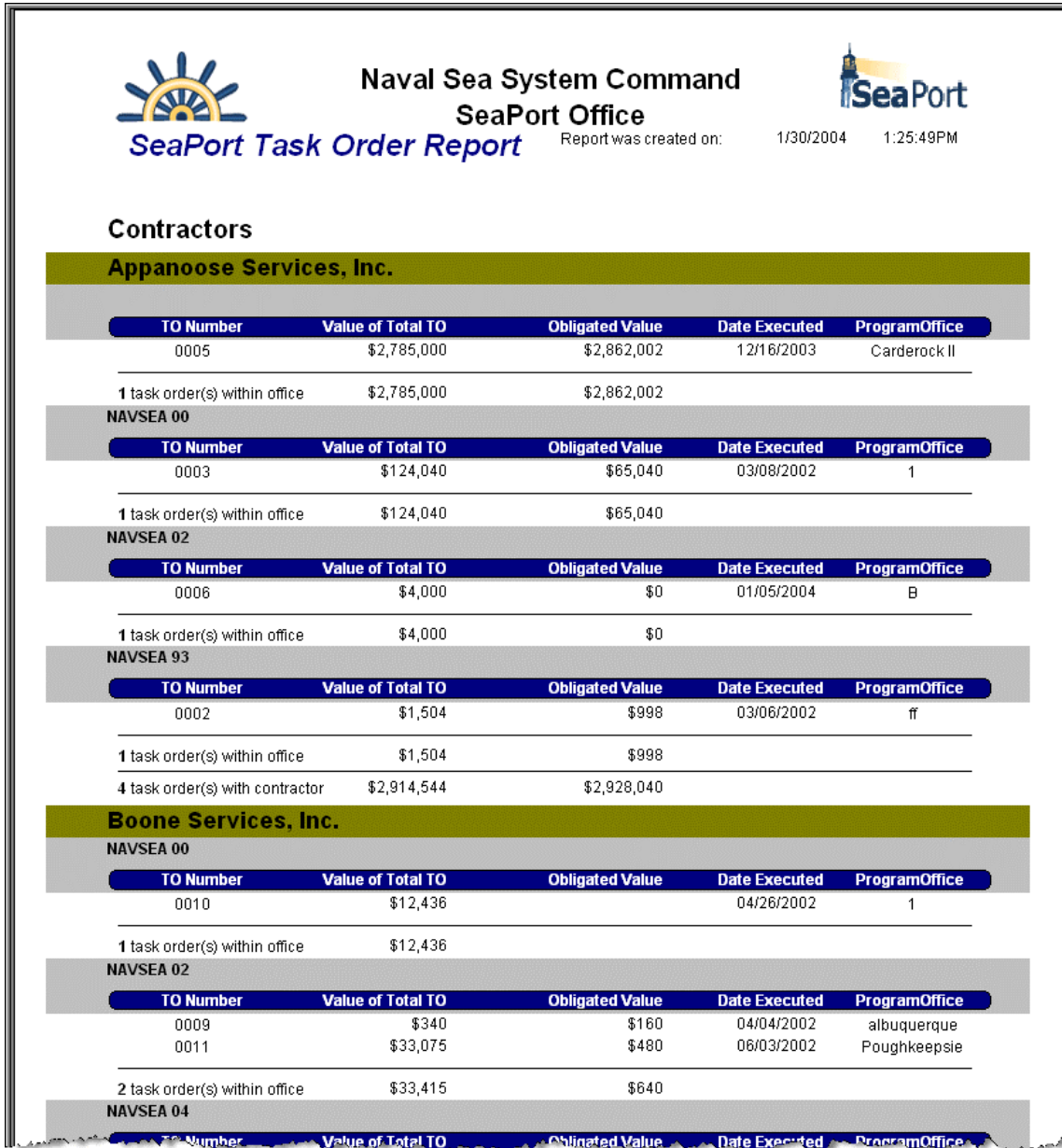



Figure 146: Reports - Task Order Report

5.4 SeaPort Timestamp Report

The SeaPort Timestamp Report displays the amount of time each package takes to go from Purchase Request to Executed Task Order and the amount of time each package spends in each particular state. Enter your report criteria to change the results that are reported.

Table 79: SeaPort Timestamp Report Parameters

Field	Type	Data
Sorted By	Dropdown	Sort the report by Activity or Program Office.
Between Starting Event and Ending Event	Dropdown	Display packages between the selected starting event and ending event. Choose from PR Creation, SD Creation, SD Lock & Release, Auction Close, Task Order Creation, or Task Order Executed. Default action for the report is to display packages from PR Creation to Task Order Execution.
Negotiator	Dropdown	Limit the report results to the Negotiator chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Dated Between	Text Box	Limit the report results to the selected date range. Type dates in directly using the MM/DD/YYYY format or use the calendar icons  to select dates.
Funding Type	Dropdown	Limit the report results to the Funding Type chosen from the dropdown list.

The screenshot shows the 'Report Parameters' page in the SeaPort system. At the top, there is a navigation bar with links for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Reports' link is highlighted. Below the navigation bar, there are buttons for 'Submit' and 'Reset'. A section titled 'TimeStamp Report requires the following parameters:' contains the following fields:

- 'Generate Advanced TimeStamp Report Sorted' with a dropdown menu set to 'By Activity'.
- 'Between Starting Event' with a dropdown menu set to 'PR Creation' and 'Ending Event' with a dropdown menu set to 'Task Order Executed'.
- 'Where' section with several filter options, each with a checkbox and a dropdown menu:
 - Negotiator: CaptainCrunch
 - PCO: Field PCO
 - Activity: DCMC Baltimore
 - Dated Between: [] And []
 - With Funding Type: FMS

A note at the bottom states: 'Note: to select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.'

Figure 147: Reports - Time Stamp Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

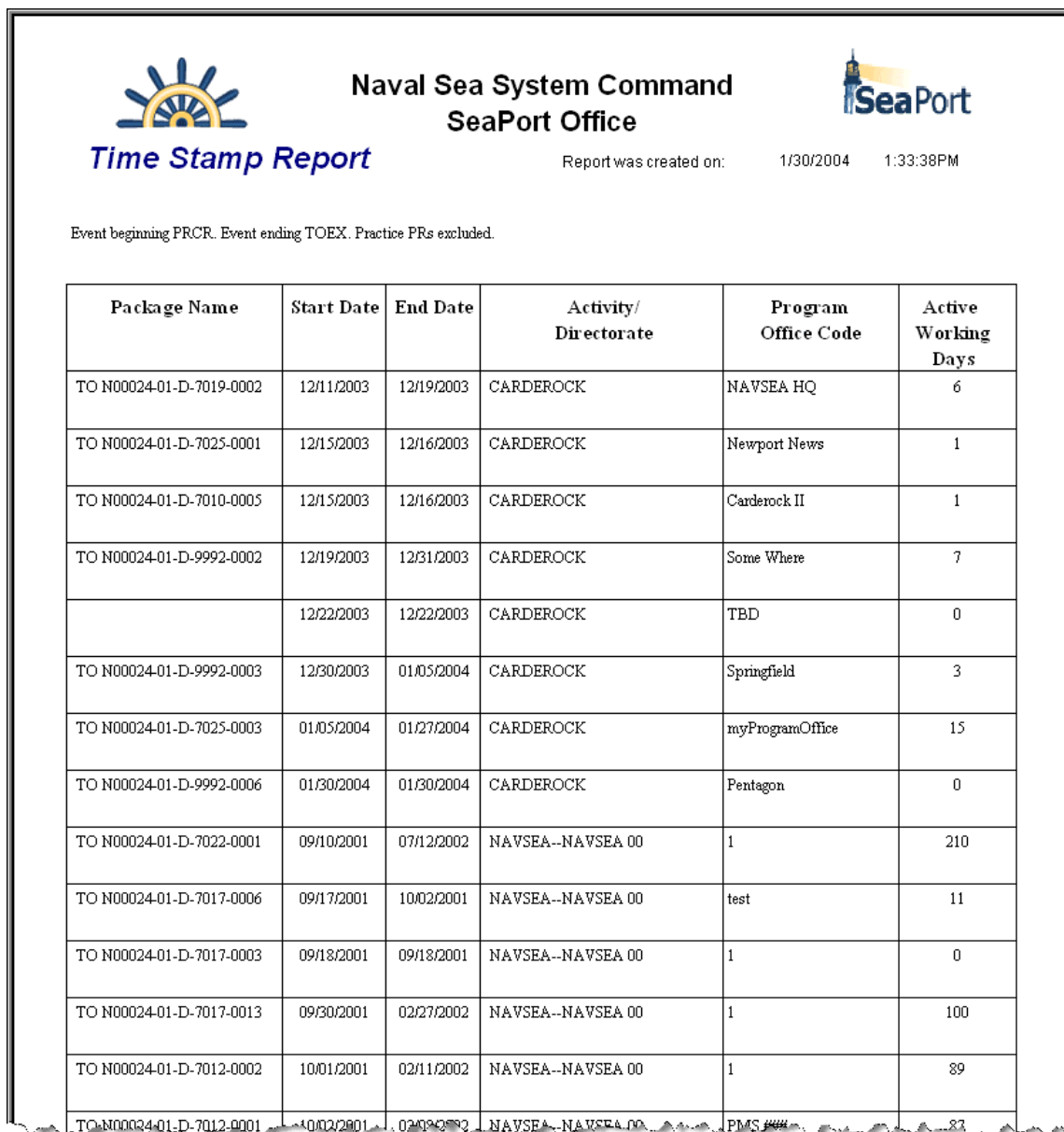


Figure 148: Reports - Time Stamp Report

5.5 SeaPort Procurement Summary Report

The SeaPort Procurement Summary Report displays a summary of all procurement documents organized by procurement cycle state. Enter your report criteria to change the results that are reported.

Table 80: SeaPort Procurement Summary Report Parameters

Field	Type	Data
Activity/Directorate	Dropdown	Limit the search results to the Activity/Directorate chosen from the dropdown list.
Customer	Dropdown	Limit the search results to the Customer chosen from the dropdown list.

Figure 149: Reports - Procurement Summary Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

Procurement Summary Report									
Created on 1/30/2004									
Criteria: All Procurement Documents Awarded Task Orders, Under Evaluation, Awaiting Proposals, RFPs Under Development, and PRs Under Development									
Awarded Task Orders									
	Contractor	Task Order Number	Customer	T Year	Total \$ (excluding Award Terms)	Total \$ (including Award Terms)	Value of (Task Order)	Obligated	Description
1	ContractTester2		TBD	1	\$2.00	\$2.00	\$2.00	\$1.00	q
2	Appanoose Services, Inc.	N00024-01-D-7010-0002	ff	1	\$1,504.00	\$1,504.00	\$1,504.00	\$998.00	task order pricing test
3	Appanoose Services, Inc.	N00024-01-D-7010-0003	1	2	\$124,040.00	\$124,040.00	\$82,040.00	\$65,040.00	a fig revised
4	Appanoose Services, Inc.	N00024-01-D-7010-0005	Carderock II	2	\$2,785,000.00	\$2,785,000.00	\$2,785,000.00	\$2,862,002.00	gggggggggggg
5	Appanoose Services, Inc.	N00024-01-D-7010-0006	B	3	\$4,000.00	\$4,000.00	\$4,000.00	\$0.00	test for Angela
6	Boone Services, Inc.	N00024-01-D-7011-0003	Team Sub	4	\$58,000.00	\$58,000.00	\$58,000.00	\$58,000.00	ASTO
7	Boone Services, Inc.	N00024-01-D-7011-0008	a	1	\$3.00	\$3.00	\$3.00	\$30.00	bbbbbb
8	Boone Services, Inc.	N00024-01-D-7011-0009	albuquerque	2	\$340.00	\$340.00	\$160.00	\$160.00	logistics

Figure 150: Reports - Procurement Summary Report

5.6 SeaPort TOPE Report

The SeaPort TOPE Report displays a summary of Task Order Performance Evaluation data meeting criteria for a particular Task Order. The report contains information on locked Task Orders and executed Task Orders that have been running for at least a year or are at the end of their period of performance. Enter your report criteria to change the results that are reported.

Table 81: SeaPort TOPE Report Parameters

Field	Type	Data
Contractor	Dropdown	Limit the search results to the Contractor chosen from the dropdown list.
TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
Date Range Between	Text Box	Enter To and From dates to define the report period.

User: Test PCO

home help log off

SeaPort

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

Report Parameters | Parameters | SeaPort Reports Menu

Submit Reset

TOPE Report requires the following parameters:

Generate Summary TOPE Report Filtered By

Contractor

TO Number

Dated Between And

Note: To select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.

Figure 151: Reports - TOPE Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

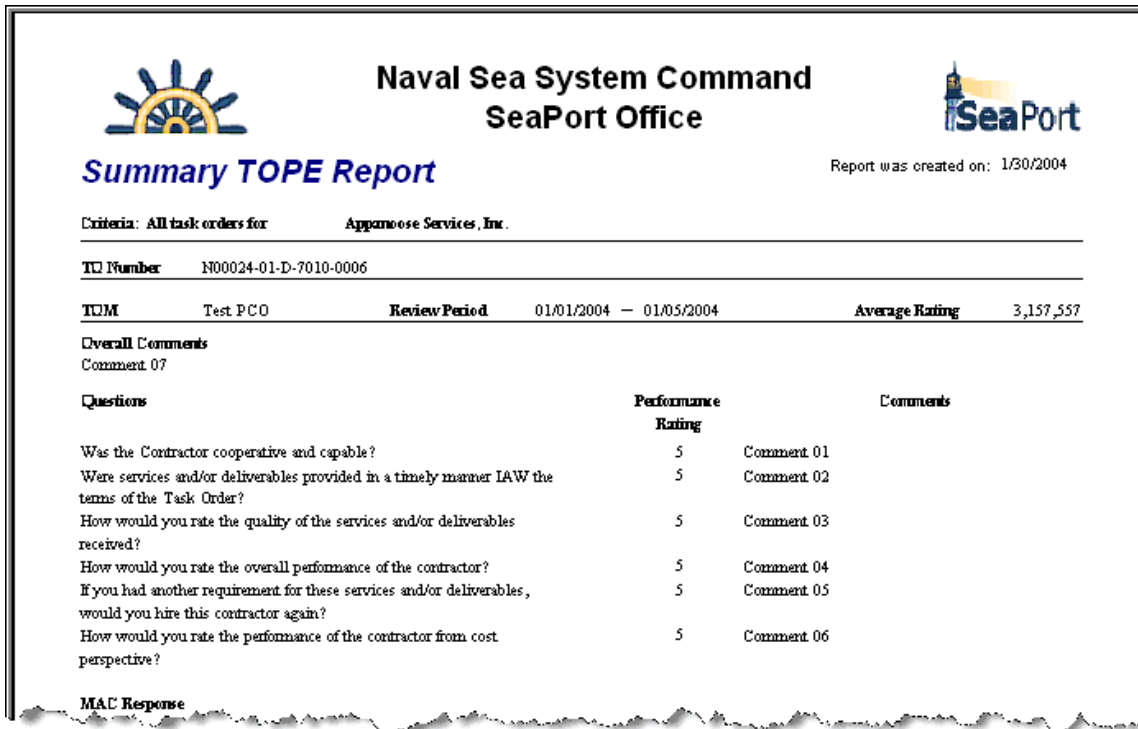


Figure 152: Reports - TOPE Report

5.7 SeaPort Issue Resolution Desk (IRD) Report

The SeaPort Issue Resolution Desk (IRD) Report displays all issues logged in the system. Enter your report criteria to change the results that are reported.

Table 82: SeaPort Issue Resolution Desk (IRD) Report Parameters

Field	Type	Data
Contractor	Dropdown	Limit the search results to the Contractor chosen from the dropdown list.
Date Range By - TO Number	Dropdown	Limit the search results to the TO Number chosen from the dropdown list.
Date Range - Between	Text Box	Enter To and From dates to define the report period.

Figure 153: Reports - Issue Resolution Desk (IRD) Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

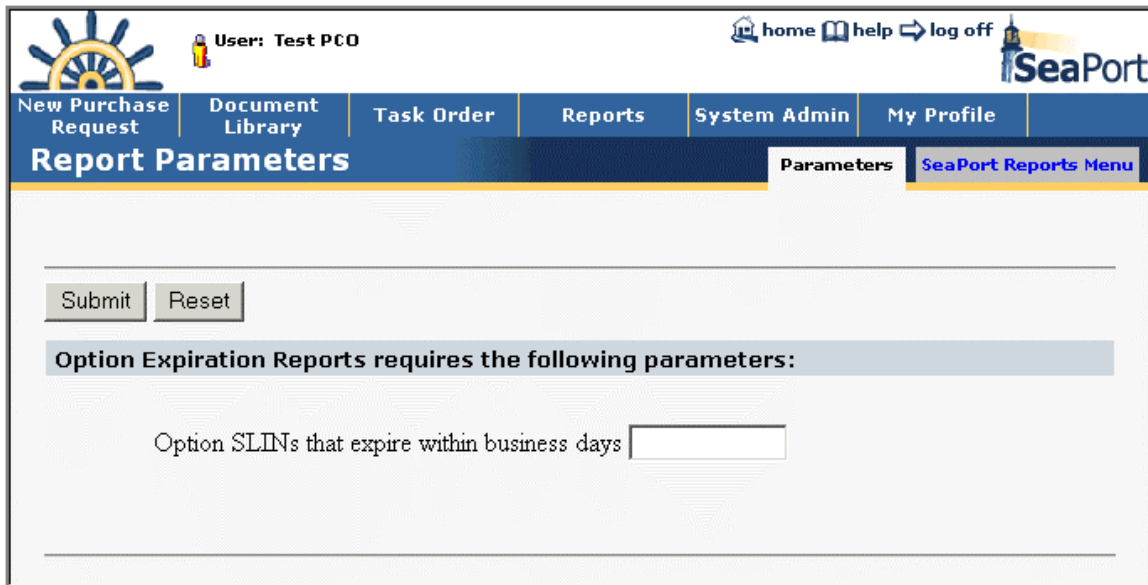
Figure 154: Reports - Issue Resolution Desk (IRD) Report

5.8 SeaPort Option Expiration Report

The SeaPort Option Expiration Report is used by the PCO to get an idea of options that are coming up on expiration. This assists the PCO in gauging workload. Enter your report criteria to change the results that are reported.

Table 83: SeaPort Option Expiration Report Parameters

Field	Type	Data
Business Days	Text Box	Enter a number of business days in the text box in order to refine your search.



The screenshot shows the SeaPort application interface. At the top, there is a user profile for 'User: Test PCO' and navigation links for 'home', 'help', and 'log off'. Below this is a main navigation bar with tabs for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Reports' tab is active, and the 'Report Parameters' sub-section is selected. The page contains a 'Submit' and 'Reset' button, followed by a message: 'Option Expiration Reports requires the following parameters:'. Below this message is a text input field with the label 'Option SLINs that expire within business days'.

Figure 155: Reports - Option Expiration Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

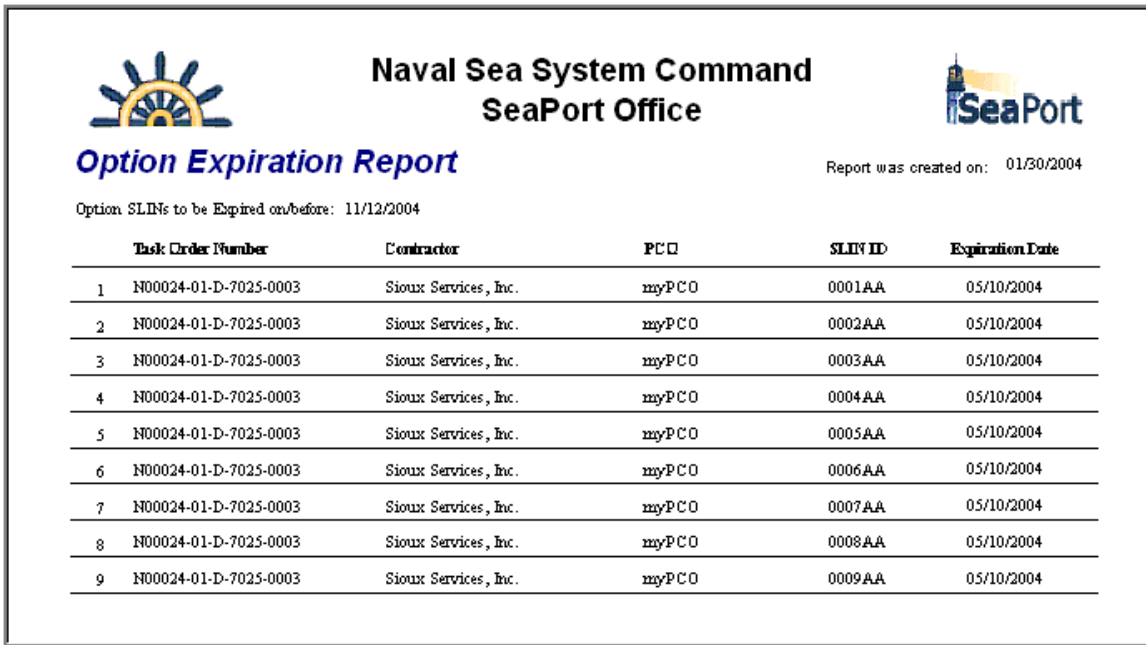


Figure 156: Reports - Option Expiration Report

5.9 SeaPort TOPE Scoring Summary Report

The SeaPort TOPE Scoring Summary Report provides more detailed information on each Performance Evaluation and a link to view the actual evaluation. Enter your report criteria to change the results that are reported.

Table 84: SeaPort TOPE Scoring Summary Report Parameters

Field	Type	Data
MAC	Dropdown	Limit the report results to the MAC Contractor chosen from the dropdown list.
TO Number	Dropdown	Limit the report results to the Task Order Number chosen from the dropdown list.
Date Range	Text Box	Enter To and From dates to define the report period.

The screenshot shows the 'Report Parameters' page in the SeaPort system. At the top, there is a navigation bar with links for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Reports' link is highlighted. Below the navigation bar, there are buttons for 'Submit' and 'Reset'. A section titled 'TOPE Scoring Summary Reports requires the following parameters:' contains the following options:

- MAC: Select Contractor (dropdown menu)
- TO Number: Select TO Number (dropdown menu)
- Date Range By:
 - Between: 1/29/2001 (calendar icon) And: 1/29/2004 (calendar icon)

Note: to select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.

Figure 157: Reports - TOPE Scoring Summary Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

TOPE Scoring Summary											
Evaluation Period:		All									
Task Order Number:		All									
Contractor:		All									
				Q1	Q2	Q3	Q4	Q5	Q6	Overall Avg	
TO Number	Eval Num	From	To	Average Score						View	
N00024-01-D-7010-0005	3	12/17/2002	12/16/2003	1.00	1.00	1.00	1.00	1.00	5.00	1.67	
N00024-01-D-7010-0005	2	12/16/2001	12/17/2002	3.00	3.00	4.00	5.00	5.00	3.00	3.83	
N00024-01-D-7010-0005	1	1/1/2001	1/1/2004	5.00	4.00	3.00	3.00	2.00	1.00	3.00	
N00024-01-D-9992-0004	1	1/19/2004	1/30/2004	5.00	4.00	3.00	3.00	4.00	3.00	3.67	
N00024-01-D-9992-0004	2	1/30/2004	1/30/2004	5.00	4.00	5.00	4.00	3.00	5.00	4.33	
Average Score				3.80	3.20	3.20	3.20	3.00	3.40	3.30	

Figure 158: Reports - TOPE Scoring Summary Report

5.10 SeaPort Executed Task Orders Report

The SeaPort Executed Task Orders Report displays Task Orders and Modifications that were executed during a specific time period. Enter your report criteria to change the results that are reported.


Table 85: SeaPort Executed Task Orders Report Parameters

Field	Type	Data
Executed Between	Text Box	Enter To and From dates to define the report period.


The screenshot shows the SeaPort web application interface. At the top, there is a navigation bar with links for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Reports' link is highlighted. Below this, a sub-navigation bar shows 'Report Parameters' and 'Parameters'. The main content area has a header 'Report Parameters' and a sub-header 'Parameters'. Below the sub-header, there are 'Submit' and 'Reset' buttons. A section titled 'Executed Task Orders Report requires the following parameters:' contains the text 'Give me all task orders' and a checkbox labeled 'Executed between' followed by two date input fields separated by 'and'. A note at the bottom states: 'Note: to select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.'

Figure 159: Reports - Executed Task Orders Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).



Naval Sea System Command
SeaPort Office



SeaPort Executed Task Order Report Report was created on: 3/15/2004 10:22:55AM

TO Number	Total Obligated Amount	Incremental Funded Amount	Date Executed	Program Office
N00024-01-D-1111-0001	\$0.00	\$0.00	03/09/2004	myLocation
N00024-01-D-1111-0002	\$0.00	\$0.00	12/31/2003	Some Where
N00024-01-D-1111-0003	\$0.00	\$0.00	01/05/2004	Springfield
N00024-01-D-1111-0004	\$0.00	\$0.00	03/09/2004	myLocation
N00024-01-D-1111-0007	\$3,900,000.00	\$0.00	02/02/2004	Area 51
N00024-01-D-1111-0008	\$0.00	\$0.00	02/17/2004	Arlington
N00024-01-D-1112-0001	\$0.00	\$0.00	02/27/2004	Norfolk Naval Base
N00024-01-D-1112-0002	\$0.00	\$0.00	02/18/2004	Area 51
N00024-01-D-1112-0004	\$0.00	\$0.00	02/27/2004	Carderock, MD
N00024-01-D-1112-0005	\$0.00	\$0.00	03/01/2004	Kalamazoo
N00024-01-D-1112-0006	\$0.00	\$0.00	03/01/2004	as
N00024-01-D-1112-0007	\$0.00	\$0.00	03/01/2004	Carderock
N00024-01-D-1112-0010	\$0.00	\$0.00	03/05/2004	Carderock
N00024-01-D-1112-0011	\$259,000.00	\$518,000.00	03/09/2004	Jacksonville
N00024-01-D-1112-0012	\$0.00	\$0.00	03/09/2004	Main
N00024-01-D-1114-0002	\$1,726,000.00	\$0.00	02/03/2004	Norfolk
N00024-01-D-1114-0003	\$0.00	\$0.00	02/17/2004	Arlington
N00024-01-D-1114-0004	\$0.00	\$0.00	02/17/2004	Arlington
N00024-01-D-1114-0007	\$0.00	\$0.00	02/26/2004	Carderock
N00024-01-D-1114-0009	\$400,000.00	\$400,000.00	02/27/2004	Carderock, MD
N00024-01-D-1114-0011	\$0.00	\$0.00	03/08/2004	Carderock

Figure 160: Reports - Executed Task Orders Report

5.11 SeaPort Timestamp Per Package Report

The SeaPort Timestamp Per Package Report displays Package Number, PR Development Time, RFP Development Time, Proposal Development Time, Proposal Evaluation Time, Award Time, and Total Potential Value. This report may be sorted by any of these values. Enter your report criteria to change the results that are reported.

Table 86: SeaPort Timestamp Per Package Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Package Number, PR Development Time, RFP Development Time, Proposal Development Time, Proposal Evaluation Time, Award Time, or Total Potential Value from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
Contractor	Dropdown	Limit the report results to the Contractor chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.
Package Number	Dropdown	Limit the report results to the Package Number chosen from the dropdown list.

User: Test PCO

home help log off

New Purchase Request Document Library Task Order Reports System Admin My Profile

Report Parameters Parameters SeaPort Reports Menu

Submit Reset

TimeStamp Per Package Report requires the following parameters:

Report Settings:

Sorted By Package Number

Generate TimeStamp Per Package Report Filtered By

Activity Select Activity

Contractor Select Contractor

PCO Select PCO

Package Number Select Package Number

Note: To select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.

Figure 161: Reports - Timestamp Per Package Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

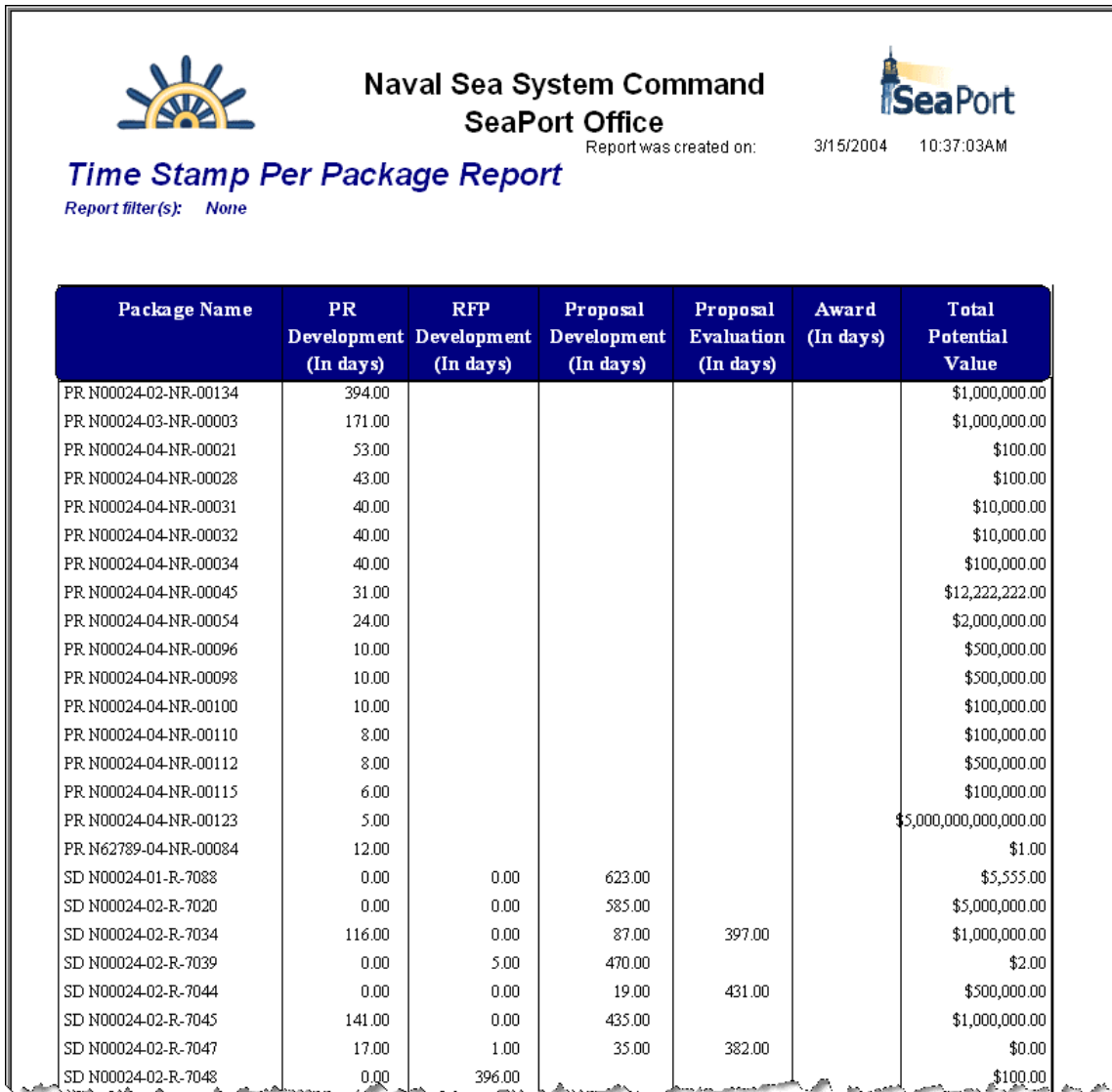


Figure 162: Reports - Timestamp Per Package Report

5.12 SeaPort Workload Report

The SeaPort Workload Report displays TO Number, Customer, Task Years, Total &, and PCO. Enter your report criteria to change the results that are reported.

Table 87: SeaPort Workload Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Task Order Number or Current PCO from the list.

Field	Type	Data
MAC	Dropdown	Limit the report results to the MAC Contractor chosen from the dropdown list.
Directorate	Dropdown	Limit the report results to the Directorate chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

The screenshot shows the SeaPort application interface. At the top, there is a navigation bar with links for 'home', 'help', and 'log off'. The user is identified as 'Test PCO'. Below the navigation bar, there is a menu with options: 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The 'Reports' menu item is selected, and the 'Report Parameters' page is displayed. The page has a sub-menu with 'Parameters' and 'SeaPort Reports Menu'. The main content area contains a 'Submit' and 'Reset' button. Below this, a message states: 'Workload Report requires the following parameters:'. Under 'Report Settings', the 'Sorted By' dropdown is set to 'Task Order Number'. The 'Generate Workload Report Filtered By' section contains four filter options, each with a checkbox and a dropdown menu: 'MAC' (Select Contractor), 'Directorate' (Select Directorate), 'Activity' (Select Activity), and 'PCO' (Select PCO). A note at the bottom states: 'Note: To select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.'

Figure 163: Reports - SeaPort Workload Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

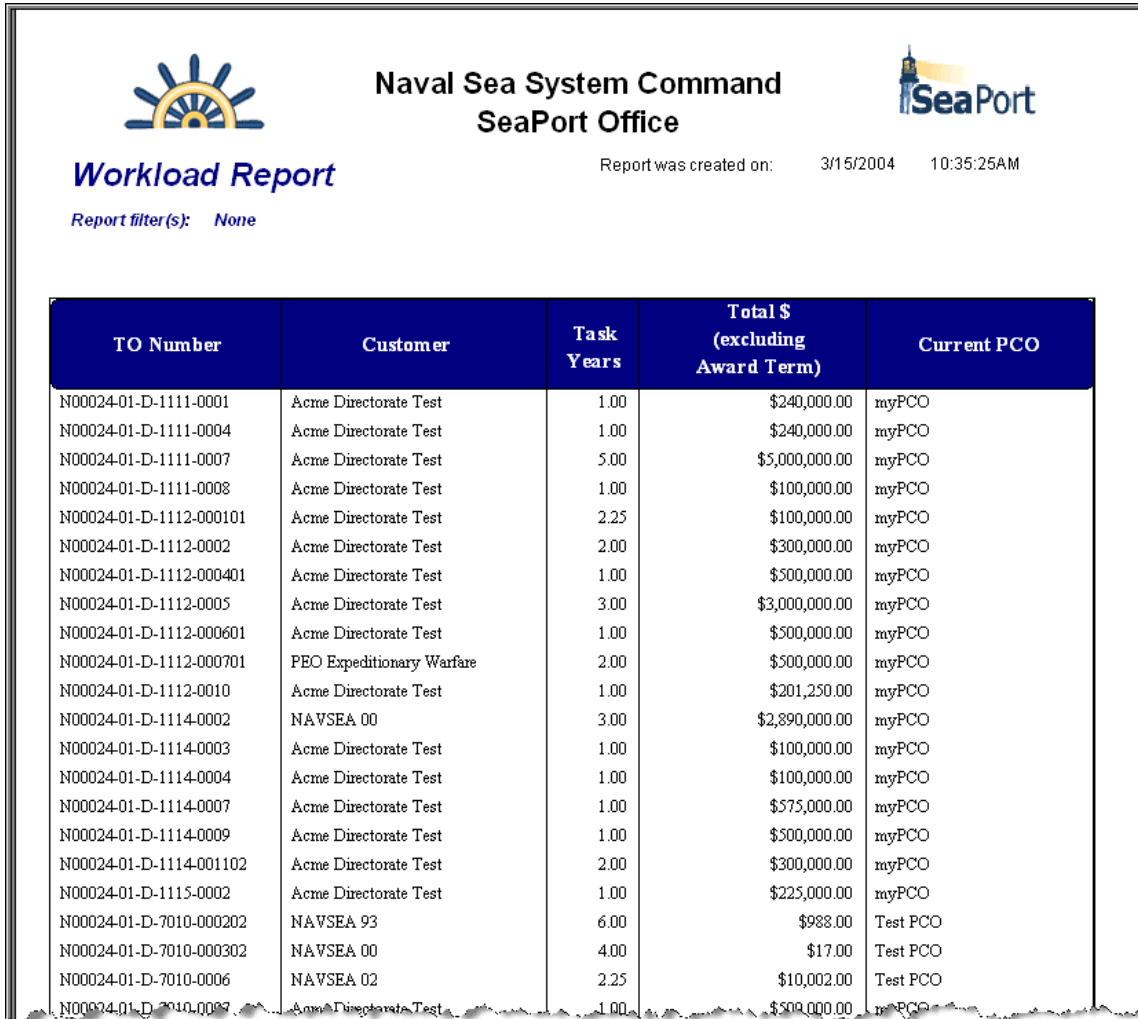


Figure 164: Reports - SeaPort Workload Report

5.13 SeaPort TOPE Status Report

The SeaPort TOPE Status Report displays detailed TOPE status information including TOPE number, status, and date. Enter your report criteria to change the results that are reported.

Table 88: SeaPort TOPE Status Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Task Order Number, TOPE Status, or PCO from the dropdown list.

Field	Type	Data
TO Number	Dropdown	Limit the report results to the Task Order Number chosen from the dropdown list.
MAC	Dropdown	Limit the report results to the MAC Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the report results to the Activity chosen from the dropdown list.
TOM	Dropdown	Limit the report results to the Task Order Manager chosen from the dropdown list.
PCO	Dropdown	Limit the report results to the PCO chosen from the dropdown list.

Figure 165: Reports - SeaPort TOPE Status Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

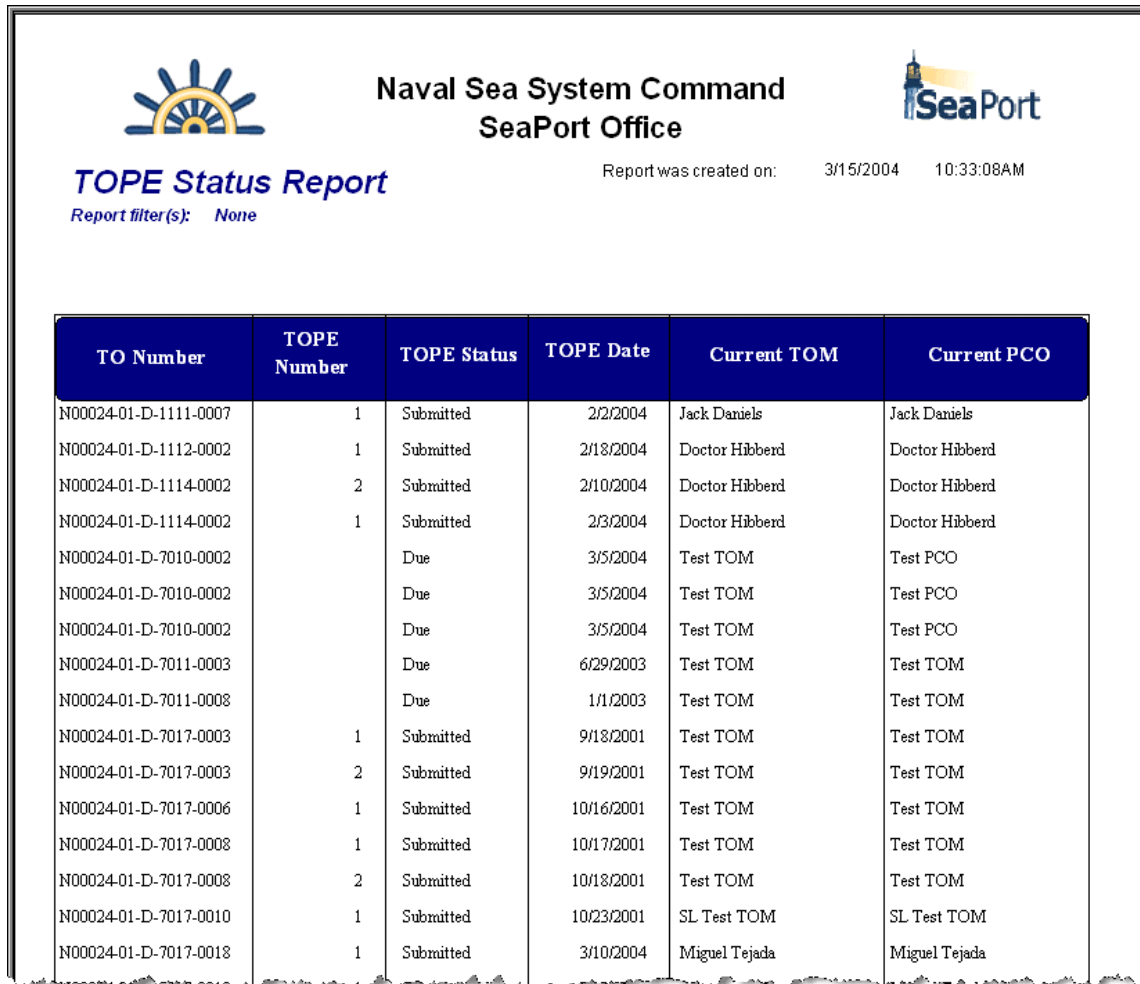


Figure 166: Reports - SeaPort TOPE Status Report

5.14 SeaPort Small Business Report

The SeaPort Small Business Report displays completed award amounts and percentages for large and small businesses. The SeaPort Small Business Report will be available to the 1102 and PCO users from the SeaPort menu. Enter your report criteria to change the results that are reported.

Table 89: SeaPort Small Business Report Parameters

Field	Type	Data
Sorted By	Dropdown	Choose Contractor, Contract Number, Number of Task Orders Awarded, Potential Value (Excluding Award Term), Potential Value (Including Award Term), Current TO Awarded Value, or Total Obligations to Date from the dropdown list.

Field	Type	Data
Contractor	Dropdown	Limit the search results to the Contractor chosen from the dropdown list.
Activity	Dropdown	Limit the search results to the Activity chosen from the dropdown list.
Potential Value (Excluding Award Term) – More Than/Less Than	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Potential Value (Including Award Term) – More Than/Less Than	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Current TO Awarded Value– More Than/Less Than	Text Box	Enter a minimum and/or maximum value to further refine the search results.
Total Obligations– More Than/Less Than	Text Box	Enter a minimum and/or maximum value to further refine the search results.

Figure 167 Reports - SeaPort Small Business Report – Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).



		Naval Sea System Command SeaPort Office				
				Report was created on: 4/7/2004 9:31:31 PM		
Small Business Report						
Report filter(s): None						
Company	Contract Number	Number of Task Orders	Total Value (excluding Award Term)	Total Value (including Award Term)	Current Value of Task Orders Awarded	Total Obligations to Date
Large Businesses						
Carroll Services, Inc.	N00024-01-D-7012	6	\$519,700.00	\$519,721.00	\$519,367.00	\$490,705.00
Decatur Services, Inc.	N00024-01-D-7013	1	\$116,000.00	\$116,000.00	\$116,000.00	\$0.00
Fayette Services, Inc.	N00024-01-D-7014	1	\$110,000.00	\$110,000.00	\$110,000.00	\$0.00
Grundy Services, Inc.	N00024-01-D-7015	2	\$123,456,856,783,450.00	\$123,456,856,783,450.00	\$123,456,789,014,529,003,480,223,548,202.00	\$123,456,789,014,529,003,480,223,548,202.00
Ida Services, Inc.	N00024-01-D-7017	11	\$4,343,131.00	\$4,343,131.00	\$3,010,661.00	\$2,490,610.00
Keokuk Services, Inc.	N00024-01-D-7019	1	\$1,789,999.00	\$1,789,999.00	\$1,789,999.00	\$1,789,999.00
Sioux Services, Inc.	N00024-01-D-7025	6	\$3,076,100.00	\$3,076,100.00	\$3,076,100.00	\$315,000.00
Van Buren Services, Inc.	N00024-01-D-7028	2	\$1,930,215.75	\$1,930,215.75	\$1,930,215.75	\$1,080,000.00
Winneshiek Services, Inc.	N00024-01-D-7030	2	\$7,502.00	\$7,505.00	\$7,502.00	\$6,500.00
ContractTester1, Inc.	N00024-01-D-1115	2	\$235,000.00	\$235,000.00	\$235,000.00	\$235,000.00
ContractTester2, Inc.	N00024-01-D-1111	6	\$5,667,017.00	\$5,667,017.00	\$4,917,011.00	\$3,900,001.00
Sub total Large Businesses		40	\$123,456,874,578,115.00	\$123,456,874,578,139.00	\$123,456,804,726,385,003,480,223,856,017.00	\$123,456,804,726,385,003,480,223,856,017.00
Small Businesses						
Appanoose Services, Inc.	N00024-01-D-7010	13	\$8,620,348.00	\$8,620,348.00	\$8,578,348.00	\$7,469,895.00
Boone Services, Inc.	N00024-01-D-7011	7	\$757,221.00	\$757,254.00	\$739,659.00	\$413,870.00
Osceola Services, Inc.	N00024-01-D-7022	1	\$10,014.00	\$10,014.00	\$10,014.00	\$500.00
Acme, Inc.	N00024-01-D-1112	22	\$18,353,026.00	\$18,353,026.00	\$17,453,026.00	\$13,227,485.00
Contractors 'R' Us	N00024-01-D-1114	10	\$6,020,351.00	\$6,020,351.00	\$6,020,351.00	\$2,561,875.00
Sub total Small Businesses		53	\$33,760,960.00	\$33,760,993.00	\$32,801,398.00	\$23,673,625.00

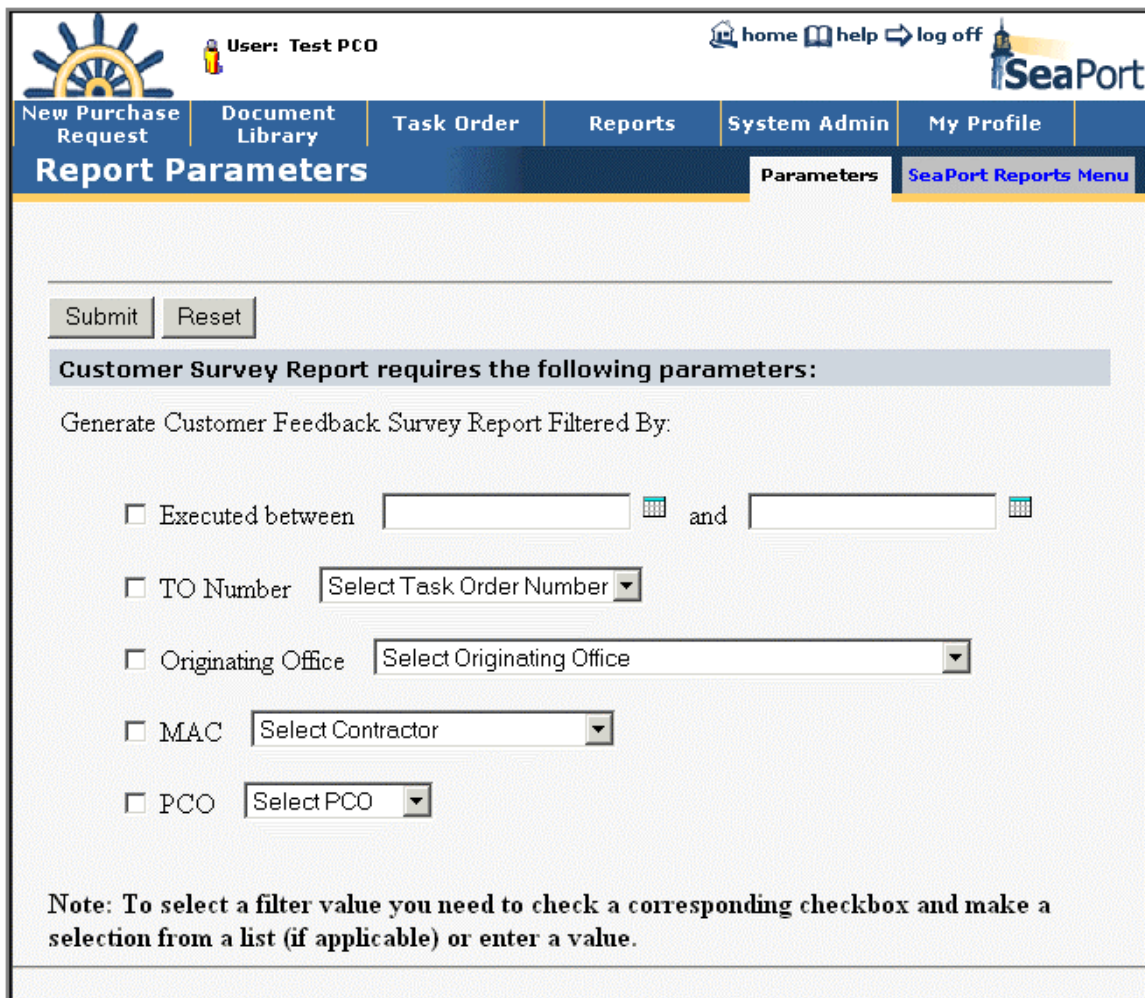
Figure 168 Reports - SeaPort Small Business Report

5.15 Customer Feedback Survey Report

The Customer Feedback Survey Report displays completed customer feedback surveys and a tabulated survey average. The SeaPort Customer Survey Report will be available to the 1102 and PCO users from the SeaPort menu. Enter your report criteria to change the results that are reported.

Table 90: Customer Feedback Survey Parameters

Field	Type	Data
Executed Between	Text Box	Enter To and From dates to define the report period.
TO Number	Dropdown	Limit the search results to the Task Order Number chosen from the dropdown list.
Originating Office	Dropdown	Limit the search results to the Originating Office chosen from the dropdown list.
MAC	Dropdown	Limit the search results to the MAC Contractor chosen from the dropdown list.
PCO	Dropdown	Limit the search results to the PCO chosen from the dropdown list.



User: Test PCO

home help log off

SeaPort

New Purchase Request Document Library Task Order Reports System Admin My Profile

Report Parameters Parameters SeaPort Reports Menu

Submit Reset

Customer Survey Report requires the following parameters:

Generate Customer Feedback Survey Report Filtered By:

Executed between and

TO Number

Originating Office

MAC

PCO

Note: To select a filter value you need to check a corresponding checkbox and make a selection from a list (if applicable) or enter a value.

Figure 169: Reports - Customer Feedback Survey Report - Parameters

After entering your report criteria, click the *Submit* button. The report will appear in a separate window (Crystal Report Viewer).

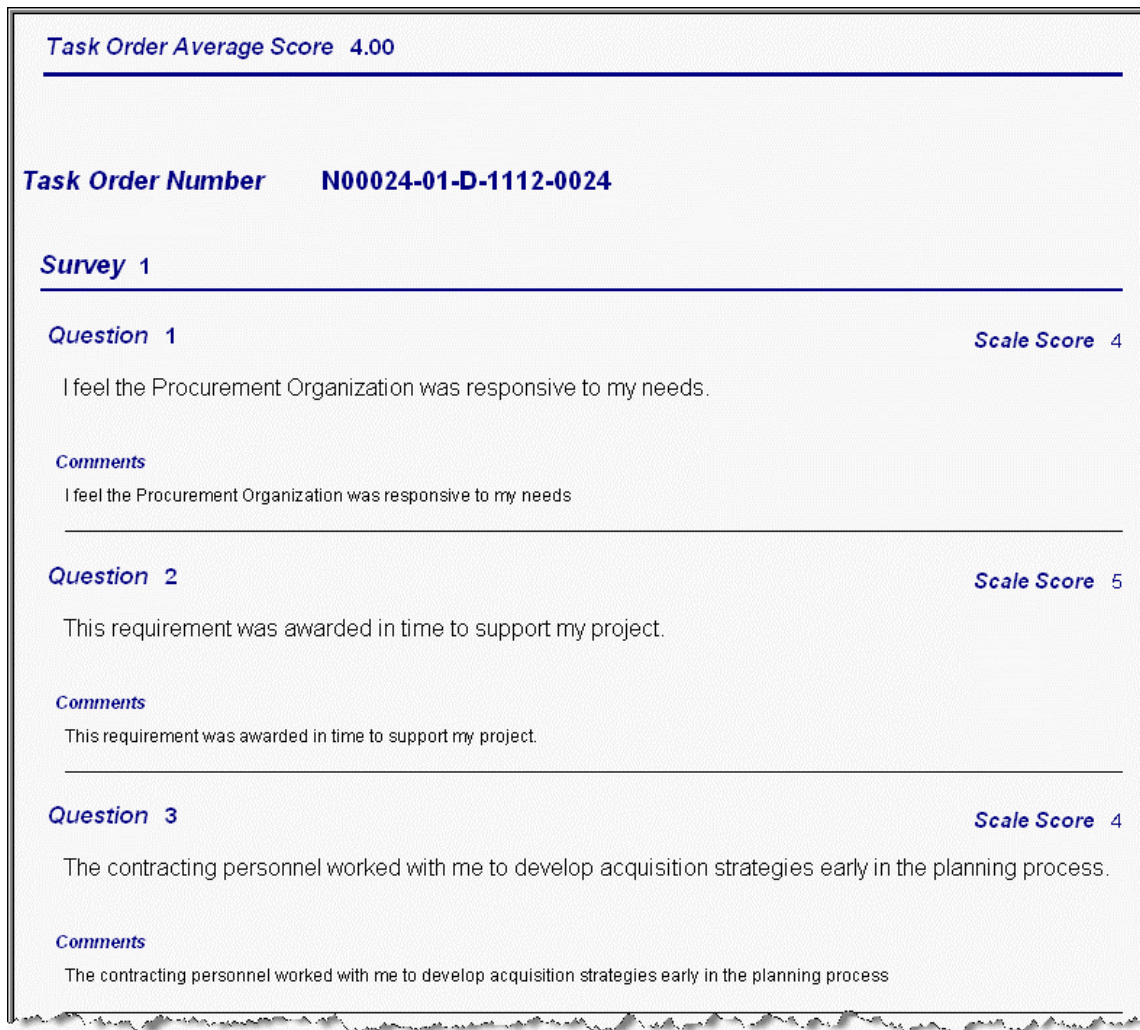


Figure 170: Reports - Customer Feedback Survey Report

6 System Administration

This section details the System Administration training session. The System Administration training session follows the structure outlined in the SeaPort II Training Plan Section 3.1: Training Methodology and contains the key concepts outlined in Section 5: Training Curriculum.

Selecting the System Admin link in the header navigation will bring up the System Administration page shown in Figure 171 below. The System Admin page contains a list of links. Select a link to perform an administrative function.

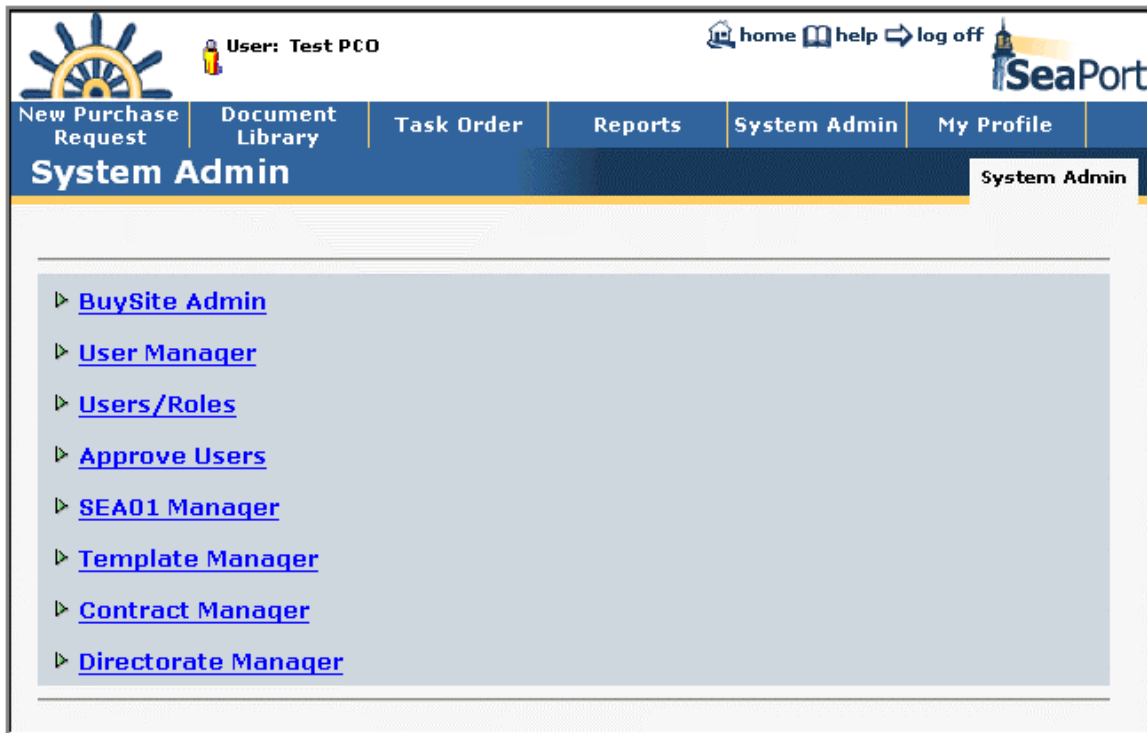


Figure 171: System Admin

6.1 BuySite Admin

Select the BuySite Admin link from the list of administrative functions found on the System Admin page. From the BuySite Admin page, the Administrator can perform tasks related to the following:

- Codes
- Setup
 - Catalog Update
 - Payments
 - Reports
- Users
- Organizations
- Roles
- Suppliers

The BuySite Admin page is shown in Figure 172 below.

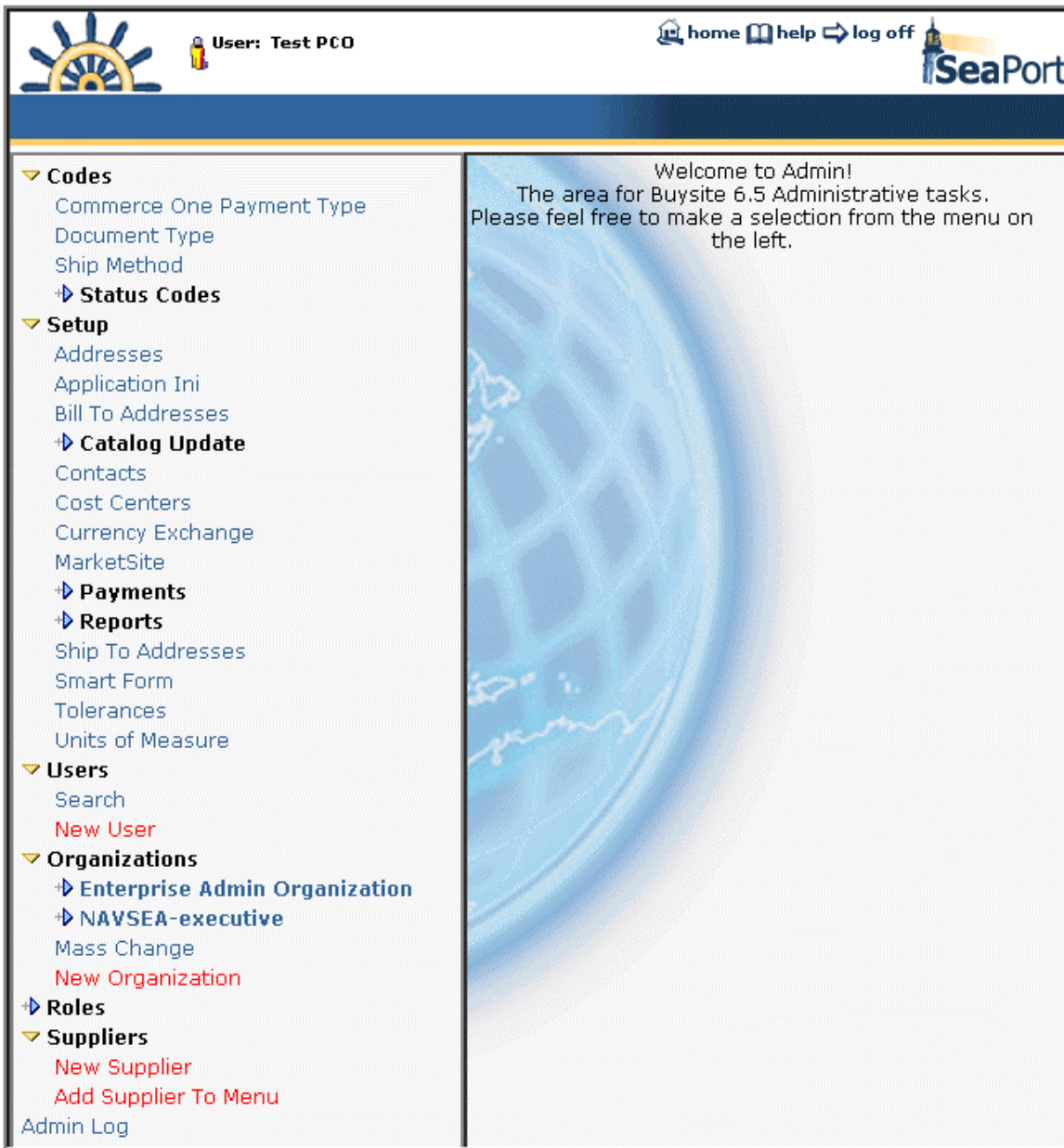


Figure 172: BuySite Admin


6.2 User Manager

Select the User Manager link from the list of administrative functions found on the System Admin page. From the User Manager page, the Administrator can deactivate a user or edit the following user information:

- Name
- Extension

- System User ID
- Login ID
- Code
- Activity
- Email
- Phone
- Fax
- Location
- Address
- City:
- State
- Zip

Initially these fields will be blank. The administrator must use the User Search feature to choose the user he wishes to edit or deactivate. After choosing a user the fields will be populated as shown in Figure 173 below.

The user can be deactivated by selecting the *Deactivate User* button or the user information can be edited by selecting the edit icon .



The screenshot shows the SeaPort User Manager interface. At the top, there is a navigation bar with links for 'New Purchase Request', 'Document Library', 'Task Order', 'Reports', 'System Admin', and 'My Profile'. The current user is identified as 'User: Test PCO'. The main content area displays the details for a user named 'Test 1301A Approver'. The details are as follows:

Name:	Test 1301A Approver	
System User ID:	100	
Login ID:	ApproverTA	
Code:	SEA012	
Activity:	Naval Sea Systems Command (NAVSEA)	
Organization:	NAVSEA 01	
Email:	tom.myers@aquilent.com	
Phone:	111-111-1111	
Extension:		
Fax:	111-111-1112	
Location:	WNY	
Address:	1 Main Street	
City:	Washington	
State:	DC	
Zip:	22222	

Figure 173: User Manager

6.3 Users/Roles

Select the Users/Roles link from the list of administrative functions found on the System Admin page. From the Users/Roles page, the Administrator can select from a list of activities and display a list of *Users per Role* or *Roles per User* for that activity. The Users/Roles page is shown in Figure 174 below.

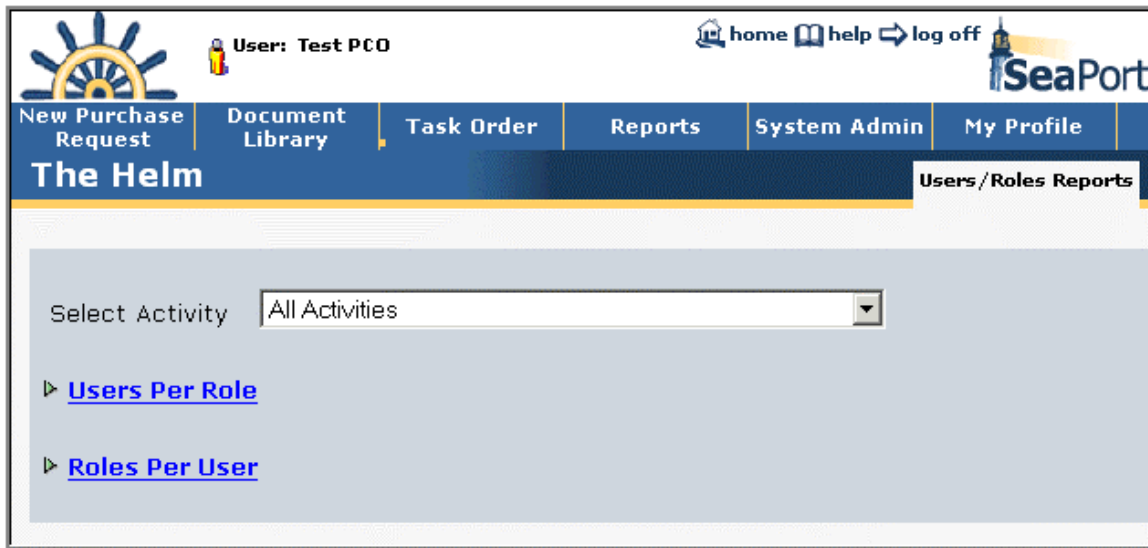


Figure 174: User Roles

6.4 Approve Users

Select the Approve Users link from the list of administrative functions found on the System Admin page. From the Approve Users page, the Administrator can review application information and approve or reject users. The Approve Users page is shown in Figure 175 below.

User: Test PCO

home help log off

New Purchase Request Document Library Task Order Reports System Admin My Profile

The Helm Template Manager

Choose a Section: Section I Contract Clauses

Choose a Template: FAR 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000) (NAVSEA VARIATION) (MAR 2000) / Section I

Save Template Delete Template

Template Name: FAR 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000) (

FAR 52.217-9 -- OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000) (NAVSEA VARIATION) (MAR 2000)

(a) The Government may extend the term of this delivery order by written notice(s) to the Contractor within the periods specified below. If more than one option exists, each option is independent of any other option, and the Government has the right to unilaterally exercise any such option whether or not it has exercised other options.

[[INSERT I_OptionExpirationDates]]

(b) If the Government exercises this option, the extended delivery order shall be considered to include this option clause.

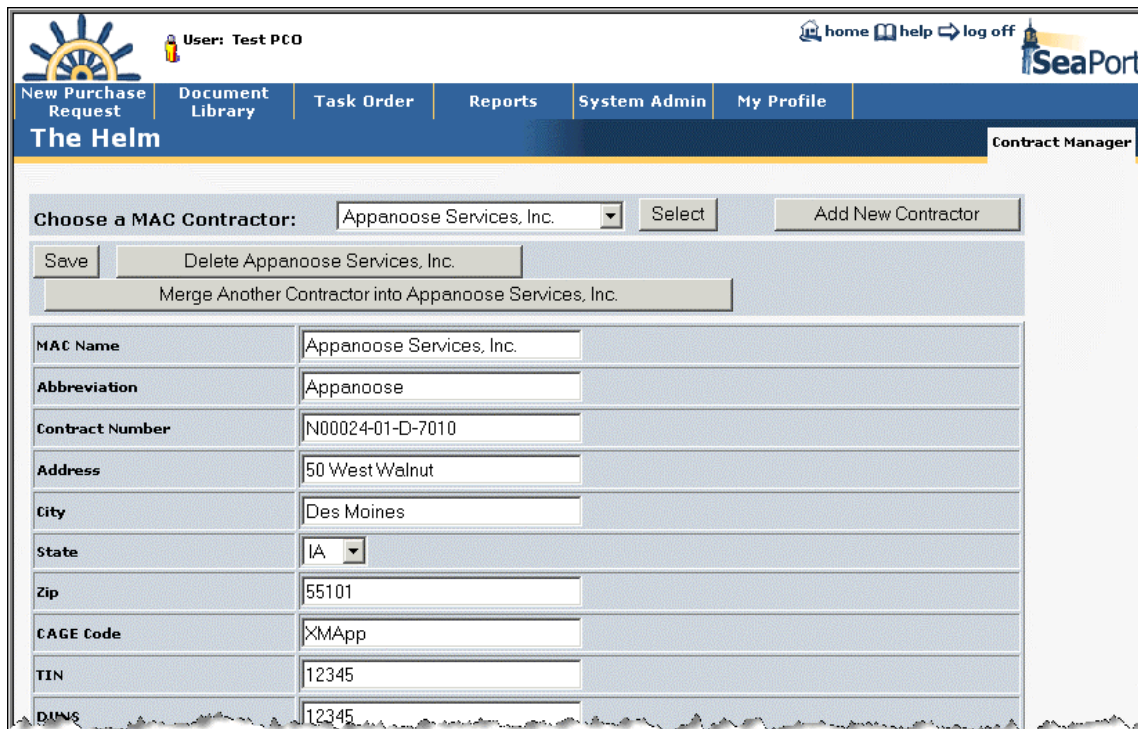
History:

Event	Date	Agent
Template choice created	6/17/2002	Enterprise Administrator User

Figure 176: Template Manager

6.6 Contract Manager

Select the Contract Manager link from the list of administrative functions found on the System Admin page. From the Contract Manager page, the Administrator can add a new MAC contractor, delete a MAC contractor, or merge one contractor into another. The Contract Manager page is shown in Figure 177 below.



User: Test PCO

home help log off

SeaPort

New Purchase Request | Document Library | Task Order | Reports | System Admin | My Profile

The Helm Contract Manager

Choose a MAC Contractor: Appanoose Services, Inc. Select Add New Contractor

Save Delete Appanoose Services, Inc. Merge Another Contractor into Appanoose Services, Inc.

MAC Name	Appanoose Services, Inc.
Abbreviation	Appanoose
Contract Number	N00024-01-D-7010
Address	50 West Walnut
City	Des Moines
State	IA
Zip	55101
CAGE Code	XMAApp
TIN	12345
DUNS	12345

Figure 177: Contract Manager

6.7 Directorate Manager

Select the Directorate Manager link from the list of administrative functions found on the System Admin page. From the Directorate Manager page, the Administrator can add a new directorate, rename an existing directorate, delete a directorate, make a directorate active/inactive, and reassign users or documents. The Directorate Manager page is shown in Figure 178 below.

User: Test PCO

[home](#) [help](#) [log off](#)

New Purchase Request
Document Library
Task Order
Reports
System Admin
My Profile

The Helm
Directorate Manager

Edit Directorate

Directorate	Active	Actions
Acme Directorate Test	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 00	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 01	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 02	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 04	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 05	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 09	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 53	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 91	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 92	<input checked="" type="radio"/> Yes <input type="radio"/> No	
NAVSEA 93	<input checked="" type="radio"/> Yes <input type="radio"/> No	
New Directorate	<input type="radio"/> Yes <input checked="" type="radio"/> No	
PEO Carriers	<input checked="" type="radio"/> Yes <input type="radio"/> No	
PEO Expeditionary Warfare	<input checked="" type="radio"/> Yes <input type="radio"/> No	
PEO Mine & Undersea Warfare	<input checked="" type="radio"/> Yes <input type="radio"/> No	
PEO Submarine	<input checked="" type="radio"/> Yes <input type="radio"/> No	
PEO Surface Strike	<input checked="" type="radio"/> Yes <input type="radio"/> No	
PEO Theater Surface Combatants	<input checked="" type="radio"/> Yes <input type="radio"/> No	

Add New Directorate

Directorate	Active	Add New
<input type="text"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="button" value="Add New Code"/>

Figure 178: Directorate Manager