Chapter 6
SPS FUNCTIONAL SYSTEM ADMINISTRATION
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6-1 INTRODUCTION

Air Force PD² Administrators are critical to successful sustainment and will receive System Administration training (e.g. DAU, DVD, OJT, In-Residence Course etc.) in addition to the standard user training. They typically have broader access than the regular user community, and more complex systems responsibilities.

This part provides instruction on areas of consideration for the initial system set-up, long term maintenance of PD² and technical/database responsibilities pertaining to system administrators.

6-1.1 System Administration (functional)

Often labeled SA, refers to the management and support of the SPS application itself and other e-business applications. Throughout the AFCEP, a reference to system administrators implies those users with functional administration responsibilities. Technical Administration refers to the more technical tasks associated with the management and support of the server and its operating system. Finally, Database Administration (DBA) refers to the performance management and support of the SPS Database. The Contracting Systems at Maxwell-Gunter Annex will provide centralized DBA support to field activities. It should be noted that while these roles have been specifically differentiated, a single person might be designated to serve multiple roles at a site.

6-1.2 User Management: The Security Model

PD^2 has three levels of security that work in a kind of hierarchy:

- System security controls access to the application itself through User ID’s and passwords.
- Menu security enables or disables Menu functions based on the access rights defined for users in the security model. For example, a user may have Requirements Menu access, but no rights to the functions in the Pre-Award/Award or Post-Award Menus.
- Document security assigns rights to specific objects based on the characteristics of the objects and the users in question.

References to PD^2’s “Security Model” typically relate to a combination of object and Menu access controls. Objects in the system may be “containers” such as cabinets and folders, or documents such as Purchase Requests and Solicitations. Access rights to the objects and functions are controlled in PD^2 and should effectively translate to privileges users have to containers and documents.

The PD^2 Security Model restricts access to system capabilities ensuring the ability to make sweeping changes are restricted to authorized system administrators. As such, it defines a users’ capability to read, write, drag (move) and delete objects on their desktops and those of other users. The general approach to PD^2 security is that documents are assigned to classes; groups are assigned to classes; and then users are assigned to groups. These terms are defined in more detail below. Within a group, Menu options can be disabled for certain users, with inactive options appearing “grayed out” for users who are denied those privileges.

A group is a collection of users who share the same set of access rights. Groups are generally based on the organizational structure and functional responsibilities (e.g., clerks, buyers, contracting officers, etc.). Access rights and menu options are defined at the group level, not for individual users. While individuals cannot be granted privileges beyond those of their specified group(s), they can be denied privileges they would otherwise have as group members.

A class is a collection of documents that share the same attributes. Classes are usually based on the different functions or phases (e.g., requirements, post-award) of objects in the procurement process. A class is associated with an object when the object is created. Access to objects depends upon three things: the object’s class, who owns the object and who is viewing the object.

A search feature provides, users access to documents within PD2. From the search window, a user's group may be granted rights not only to view a document located on someone else's desk, but also to drag that document onto the viewer's desktop. Drag is therefore a very powerful right that the Air Force reserves for managers and system administrators.

The Air Force PD² Security Model was established using standard Air Force contracting, organization and naming conventions. The Air Force security model rules shall be followed. However, they can be adapted to meet the needs of each contracting office. . Security Model Rules to Remember:

The Air Force Security Model provides a foundation from which to customize your site specific requirements. As such, you may need to make adjustments to the Standard Security Model to suit your particular business processes. The following list provides some helpful hints to remember if and when you customize your security model:

- Your office organization chart is a valuable tool that you can use to develop your Security Model.
- A user cannot delete a document from any other user's desktop
- A user automatically has Read privileges to a document on their desktop
- After a document has been approved, it becomes Read-only (regardless of security)
- A user belonging to multiple groups has the "sum" of all the access levels defined for each group
- An individual user cannot be granted privileges that they do not have based on their group, only denied privileges that they would otherwise have as a group member
- There should be a class defined for every object which members of the group can create via the Menu. If one of your users is unable to create a particular type of document, double-check how the Group is defined and verify that, for that Group, the object for that document type has a class defined for it.

PD² is installed with a sysadmin user and group. While these are not part of the standard Air Force Security Model, it is essential for initial development of groups and users. **Do not** delete the sysadmin user or group when developing your security model..

PD² is also installed with two default Teams called System and System2. It is highly recommended that you assign every system user to the System Team as it will give them access to the Trash team cabinet. The significance of the Trash team cabinet is that it provides a location for the user to drag a document that they wish to delete and still have an option to recover it in the event that the deletion was a mistake. The alternative, PD²'s File Delete command, completely "incinerates" the object being deleted making it unrecoverable.

6-1.2.1 Air Force Security Model Blanket Rules

These blanket rules were applied in the development of the Air Force Standard Security Model. They tie Air Force Groups to their rights with respect to the defined Classes of objects:

Note: XXX Source Selection/Team is defined in 6-2.1.3

- SA group has read, write, drag and delete access to all classes on all desktops except Source Selection group(s)
- All groups have read, write and delete access to their own desktop containers
- Mgt, SAP CO, Large CO, and SA groups have read access to other groups' documents except Source Selection
- Mgmt group has drag access for all documents on all desktops
- SAP CO, Large CO, CS, CN, Mgmt and Source Selection groups have write access for all classes on their own desktops
- Support group has write access for Funding, and General classes on users' own desktops
- Review group has write access to General classes on users' own desktops
- Customers have write access for Funding, Requirements, and General classes on their own desktops
- Finance has write access to General, and Funds on own desktops
- MAJCOM has write access to General classes on users' own desktops
- Source Selection has read, write and drag access to all classes on users' own desktops
- No one outside a Source Selection group may access Source Selection documents
- XXX Team group has read and drag access to all classes on users' own desktops. The purpose of this secondary group is to assign merely read access to documents within a team group. In order to access and edit documents, users would drag documents from a team cabinet onto their own desktops, thereby activating document access as established by their primary group membership
- Because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the Class Access section. Once you create teams, they will need to associate class access to those teams accordingly, and may use the tables in this section for guidance.
- Team leaders must be given access to the team cabinet through system administration in order for them to be able to see the cabinet on their desktop.
- In addition to the Air Force blanket rules, several default system rules apply. These supersede customized access rights:
  - All groups have read access to all classes on fellow group members' desktops
  - All users have drag access on their own desktops
  - No users have write access on other users' desktops
  - Per CACI, all Teams must have a Team Group of "Team". Correspondingly, because of this, all system users should be a member of the Team Group.

6-1.2.2 Air Force Standard Groups

The Air Force Security Model was established using standard Air Force contracting, organization and naming conventions. This baseline can be customized to meet the needs of each contracting office.

Standard Group Code	*Standard Description*
Mgmt (Management)	Identifies the Squadron Commander, Deputy, Director of Business Operations, and Contracting Superintendent. Anyone who is a first-level supervisor or above should be a member of the Mgmt Group.
SAP CO	Identifies warranted contracting officers whose authority is limited to actions under the Simplified Acquisition Procedure (SAP) threshold.
Large CO	Identifies warranted Contracting Officers with authority to execute formal acquisitions. Their authority is not limited to actions under the Simplified Acquisition Procedure (SAP) threshold.
CS (Contract Specialist)	Identifies contracting professionals who do not possess Contracting Officer authority but work under the guidance of a Contracting Officer. The term contract specialist is a generic descriptor for this level of individual whose formal job title on his or her position descriptor may differ. As members of the CS Group have the ability to cancel documents and members of the CN Group do not, it is recommended that you assign your buyers to the CS rather than the CN Group.
CN (Contract Negotiator)	Also identifies contracting professionals who do not possess Contracting Officer authority but work under the guidance of a Contracting Officer.
Support (Administrative Support)	Identifies individuals responsible for satisfying the office administrative duties of the typical contracting office. These positions include, but are not limited to, Executive Secretary, information specialists, file clerks, receptionists, etc.
Review (Reviewer)	Identifies individuals who perform specialized functions associated with the typical contracting process. These positions include, but are not limited to the Small Business Specialist, individuals responsible for the development and implementation of policy and procedures, contract review, and pricing functions.
Customer	Identifies those individuals/organizations supported by the local contracting office with access to PD^2.
SA (Functional/Technical System Administrator)	Identifies individuals responsible for the daily management of the Standard Procurement System. Individuals assigned as system administrators must have a Primary Group of SA. Members of the (Air Force) SA Group should also be members of the (DoD) sysadmin Group.
Finance	Identifies supporting accounting and finance personnel who have

Standard Group Code	***Standard Description***
	access to PD².
MAJCOM	MAJCOM A7K or PK staffs who have policy oversight of the contracting office.
XXX Source Selection	An ad hoc group designed for specific source selection. This will ensure that source selection documents are properly protected from release to individuals outside the source selection team.
XXX Team	An optional group which provides universal rights within team cabinets. **Note:** As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data Load does not contain the read and drag rights to XXX Team as annotated in the Class Access. Once you create teams, they will need to associate class access to those teams accordingly, and may use the tables in this section for guidance.

Remember that Groups are defined by access rights and not necessarily by job titles. If a clerk in your office has buying privileges, they should probably be given limited membership in the CS Group. This can be accomplished by denying certain privileges on a user level. Other adjustments may also be necessary.

As a system administrator, you will also notice a group called "sysadmin," for system administration. This is a default Group into which an automatic user assignment is made upon creation of the database. The sysadmin account is especially important when it comes to Adapter administration. In an unmodified Adapter configuration, incoming requirements are automatically routed to the sysadmin inbox so it is important that, in those instances where the default Inbox for requirements receipt remains unchanged, whoever in your organization is the Adapter administrator be a member of the sysadmin Group.

6-1.2.3 Air Force Standard Classes

There may be cases in complex organizational structures where it is advantageous to have different groups (e.g., small purchase and contracts) create the same object (e.g., SF 18) into different classes (small purchase and pre-award). However, in most cases, all groups will create objects into the same class.

The Air Force classes are fairly straightforward. Following is a table documenting these and their related object assignments. The basic list includes: Funding, Requirements, Pre-Award/Award, Post-Award, DeskTop Container Objects, General, and Funds Certification.

Object Type vs Classes

Object Type	Object Class
Accounting Pre-Award Survey (SF-1408)	Pre/Awrd

Object Type	Object Class
Agreement Order/Contract (DD 1155)	PostAwrd
Agreement Order/Contract (DD 1155) Mod	PostAwrd
Agreement Order/Contract (SF 1449)	PostAwrd
Agreement Order/Contract (SF 1449) Mod	PostAwrd
Agreement Order/Contract (SF 26)	PostAwrd
Agreement Order/Contract (SF 26) Mod	PostAwrd
Agreement Status	PostAwrd
Architect-Engineer Contract	Pre/Awrd
Architect-Engineer Contract Mod	PostAwrd
Attachment	General
Audit	General
Audit Tracking	General
Award / Contract (SF26)	Pre/Awrd
Award Status	PostAwrd
Basic Agreement (SF 1449)	Pre/Awrd
Basic Agreement (SF 1449) Mod	PostAwrd
Basic Agreement (SF 26)	Pre/Awrd
Basic Agreement (SF 26) Mod	PostAwrd
Blanket Purchase Master Agreement	Pre/Awrd
BOA (SF 1449)	Pre/Awrd
BOA (SF 1449) Mod	PostAwrd
BOA (SF 26)	Pre/Awrd
BOA (SF 26) Mod	PostAwrd
BPA Call	PostAwrd
BPA Call Mod	PostAwrd
BPA Master Mod	PostAwrd
Cabinet	DeskTop
CBD Announcement	General
CDRL	Reqmt
Checklist	General
Commercial Award Mod	PostAwrd
Commercial Contract Award	Pre/Awrd
Commercial Delivery Order (SF 1449)	PostAwrd
Commercial Delivery Order Mod	PostAwrd
Commercial Solicitation	Pre/Awrd
Commercial Solicitation Amendment	Pre/Awrd
Construction Award Mod	PostAwrd
Construction Contract Award	Pre/Awrd
Construction Solicitation	Pre/Awrd
Construction Solicitation Amend	Pre/Awrd
Contract Closeout Checklist	PostAwrd

Object Type	Object Class
Contract Completion Statement	PostAwrd
Contract Distribution List	General
Contract Mod	PostAwrd
Contract Security Classification Specification	Reqmt
Contractor Proposal	General
Correspondence Log	General
Customer Feedback Form	General
Delivery Order (DD 1155)	PostAwrd
Delivery Order (SF 1442)	PostAwrd
Delivery Order (SF 252)	PostAwrd
Delivery Order (SF 26)	PostAwrd
Delivery Order (SF 33)	PostAwrd
Delivery Order Modification (SF 1442)	PostAwrd
Delivery Order Modification (SF 252)	PostAwrd
Delivery Order Modification (SF 26)	PostAwrd
Delivery Order Modification (SF 33)	PostAwrd
Delivery/Payment Tracking Source	PostAwrd
Desktop Object	DeskTop
Envelope	DeskTop
External Agreement (BPA Master Agreement)	Pre/Awrd
External Agreement (SF 1449 – Basic Agreement	Pre/Awrd
External Agreement (SF 1449 – BOA)	Pre/Awrd
External Agreement (SF 1449 – MARAV)	Pre/Awrd
External Agreement (SF 26 – Basic Agreement)	Pre/Awrd
External Agreement (SF 26 – BOA)	Pre/Awrd
External Agreement (SF 26 – MARAV)	Pre/Awrd
External Award (DD 1155)	Pre/Awrd
External Award (SF 1442)	Pre/Awrd
External Award (SF 1449)	Pre/Awrd
External Award (SF 252)	Pre/Awrd
External Award (SF 26)	Pre/Awrd
External Award (SF 33)	Pre/Awrd
External Award / Contract	Pre/Awrd
Financial Pre-Award Survey	Pre/Awrd
Folder	DeskTop
FPDS – Individual Contacting Action Report	Pre/Awrd
FPDS – Monthly Contracting Actions	Pre/Awrd
Funds Certification Document – DD1155	Funds
Funds Certification Document – DD1155 Mod	Funds
Funds Certification Document – SF 1442	Funds
Funds Certification Document – SF 1442 Mod	Funds

Object Type	Object Class
Funds Certification Document – SF 1449	Funds
Funds Certification Document – SF 1449 Mod	Funds
Funds Certification Document – SF 252	Funds
Funds Certification Document – SF 252 Mod	Funds
Funds Certification Document – SF 26	Funds
Funds Certification Document – SF 26 Mod	Funds
Funds Certification Document – SF 33	Funds
Funds Certification Document – SF 33 Mod	Funds
Government Estimate	General
Government Negotiation	General
Government Objective	General
Imprest Funds	Pre/Awrd
Inbox	DeskTop
Information to Offerors or Quotees	Pre/Awrd
Large Purchase Award	Pre/Awrd
MARAV (SF 1449)	Pre/Awrd
MARAV (SF 1449) Mod	PostAwrd
MARAV (SF 26)	Pre/Awrd
MARAV (SF 26) Mod	PostAwrd
Memorandum of Agreement	General
Milestone Plan	General
MIPR	Funding
Multiple Contract Mod	PostAwrd
Offer Evaluation	Pre/Awrd
Outbox	DeskTop
PO/DO Mod	PostAwrd
PR Mod	Reqmt
Pre-/Post–Negotiation Position	General
Pre-Award Survey Request	Pre/Awrd
Production Pre-Award Survey	Pre/Awrd
Purchase Request	Reqmt
Quality Assurance Pre-Award Survey	Pre/Awrd
Request For Quotations	Pre/Awrd
RFQ Amendment	Pre/Awrd
SF33 Award Mod	PostAwrd
Simplified Acquisition	Pre/Awrd
Solicitation Amendment	Pre/Awrd
Solicitation Mailing List	Pre/Awrd
Solicitation, Offer, and Award	Pre/Awrd
Team Cabinet	DeskTop
Technical Analysis Report	General

Object Type	Object Class
Technical Pre-Award Survey	Pre/Awrd
Telecommunications Inquiry	Pre/Awrd
Telecommunications Order	PostAwrd
Telecommunications Request	Reqmt
TI Amendment	Pre/Awrd
TO Mod	PostAwrd
TR Mod	Reqmt
Vendor Dispute Tracking	General
Vendor Performance Evaluation	General
Workload Folder	DeskTop

6-1.2.4 Air Force Menu Options

In the Security Model section, you will find a table listing the Menu options assigned to each group for each Menu item available in PD² . Blanket access rules were applied in the assignment of Menu privileges. Users do not require Menu access to read a document, only to create one. (To read a document, double-click on the icon.) Exceptions to this general rule include non-standard Menus that do not apply to document creation, but are informational or functional, such as: Alerts, Analyze, Approvals (which opens up the Approval Sheets), Attachment Information, Change, Notes (which open Notes without opening documents), Properties, Reports, Rename, Renumber, Route, Search, User Workload, Workload Management and Automatic Assignment of workload.

Certain Menu items (such as the Reference Library or Exit) are available to all groups, but most Menu items can be turned on or off. Note that a group must have access to a parent Menu in order to reach the sub-menus.

Having a Menu option does not supersede security. If users cannot write to Forms or Reports, or cannot create SMLs, Modifications or Amendments, they should not have Menu access to those objects and functions. (It is possible to have Menu options than you cannot access, if your security and document access rights are limited.)

One such example in the Air Force Security Model is “delete” access, which has been granted to all groups at the parent Menu level. All users were given the right to delete Desktop Container Objects in the Air Force security model “blanket rules”. However, users will not have rights to delete objects normally restricted from deletion by the Security Model. In fact, under the Air Force blanket rules, only System Administrators can delete PD² objects other than desktop containers. For removal of unwanted forms and other documents, the Air Force established a convention for routing unwanted materials to a “Trash” cabinet for System Administrators to access and empty. This is described in Chapter 1: SPS User Guidance.

TABLE 1: STANDARD SECURITY MODEL MENUS BY GROUPS * Denotes New Menu Options

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
Menu Name													
File	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**
New	X	X	X	X	X	X	X	X	X	X	X	X	X
Cabinet	X	X	X	X	X	X	X	X	X	X	X	X	X
Envelope	X	X	X	X	X	X	X	X	X	X	X	X	X
Folder	X	X	X	X	X	X	X	X	X	X	X	X	X
Shortcut	X	X	X	X	X	X	X	X	X	X	X	X	X
Open	X	X	X	X	X	X	X	X	X	X	X	X	X
Close	X	X	X	X	X	X	X	X	X	X	X	X	X
Delete	X	X	X	X	X	X	X	X	X	X	X	X	X
Cancel		X	X	X			X						
Rename	X	X	X	X	X	X	X					X	
Search	X	X	X	X	X	X	X	X	X	X	X	X	X
Properties	X	X	X	X	X	X	X	X	X	X	X	X	X
Print	X	X	X	X	X	X	X	X	X	X	X	X	X
Print Preview	X	X	X	X	X	X	X	X	X	X	X	X	X
Print Setup	X	X	X	X	X	X	X	X	X	X	X	X	X
Note	X	X	X	X	X	X	X	X	X	X	X	X	X
Route	X	X	X	X	X	X	X	X	X	X	X	X	X
Exit	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Edit	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**
Copy	X	X	X	X	X	X	X	X	X	X	X	X	X
Cut	X	X	X	X	X	X	X	X	X	X	X	X	X
Paste	X	X	X	X	X	X	X	X	X	X	X	X	X
Procurement	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**
Requirements	X	X	X	X	X	X	X		X	X		X	
PR Form	X	X	X	X	X	X	X		X	X		X	
TR Form	X	X	X	X	X	X	X		X	X		X	
Copy PR /TR	X	X	X	X	X	X	X		X	X		X	

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
MIPR (DD 448)	X	X	X	X	X	X	X		X	X		X	
Security (DD 254)	X	X	X	X	X	X	X		X			X	
CDRL (DD 1423)	X	X	X	X	X	X	X		X			X	
PR Modification	X	X	X	X	X	X	X		X	X		X	
TR Modification	X	X	X	X	X	X	X		X	X		X	
Requirement Status	X	X	X	X	X	X	X		X	X		X	
Funding Status	X	X	X	X	X	X	X		X	X		X	
Pre-Award/Award	X	X	X	X	X	X	X					X	
Solicitations	X	X	X	X	X	X	X					X	
Solicitation Mailing List	X	X	X	X	X	X	X					X	
IOQ (DD Form 1707)	X	X	X	X	X		X					X	
RFQ (SF 18)	X	X	X	X	X		X					X	
RFP/IFB (SF 33)	X	X	X	X	X		X					X	
Commercial Solicitation (SF1449)	X	X	X	X	X		X					X	
Construction Solicitation (SF 1442)	X	X	X	X	X		X					X	
Telecommunications Inquiry	X	X	X	X	X		X					X	
Amendment (SF 30)	X	X	X	X	X		X					X	
Telecommunications Amendment	X	X	X	X	X		X					X	
Pre-Award Survey	X		X	X	X		X					X	
General (SF 1403)	X		X	X	X		X					X	
Technical (SF 1404)	X		X	X	X		X					X	
Production (SF 1405)	X		X	X	X		X					X	
Quality Assurance (SF 1406)	X		X	X	X		X					X	
Financial (SF 1407)	X		X	X	X		X					X	
Accounting System (SF 1408)	X		X	X	X		X					X	
Offer Evaluation	X	X	X	X	X		X					X	
Certify Funds[1]	X	X	X	X	X		X					X	
Funding Document	X	X	X	X	X		X					X	
Apply Document	X	X	X	X	X		X					X	
Agreements	X	X	X	X	X		X					X	

[1] The "Certify Funds" collection of menu commands, which appears in PD² v4.2 Increment 1, has been removed from the product, effective with v4.2 Increment 2. This change is neither identified nor discussed in any detail in AMS' Release Notes for this version of the product.

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
BPA Master Agreement	X	X	X	X	X		X					X	
SF 26	X	X	X	X	X		X					X	
Basic Agreement	X	X	X	X	X		X					X	
Basic Order Agreement	X	X	X	X	X		X					X	
MARAV													
SF 1449	X	X	X	X	X		X					X	
Basic Agreement	X	X	X	X	X		X					X	
Basic Order Agreement	X	X	X	X	X		X					X	
MARAV													
Awards	X	X	X	X	X		X					X	
Architect-Engineer Contract (SF 252)	X	X	X	X	X		X					X	
Commercial Purchase (SF 1449)	X	X	X	X	X		X					X	
Construction Purchase (SF 1442)	X	X	X	X	X		X					X	
Impress Fund Disbursement							⃠						
Large Purchase (SF 26)	X		X	X	X		X					X	
Large Purchase (SF 33)	X		X	X	X		X					X	
Simplified Acquisition (DD 1155)	X	X	X	X	X		X					X	
Automatic Ordering	X	X	X				X					X	
External Agreements	X	X	X	X	X		X					X	
BPA Master Agreement	X	X	X	X	X		X					X	
SF 26	X	X	X	X	X		X					X	
Basic Agreements	X	X	X	X	X		X					X	
Basic Ordering Agreement	X	X	X	X	X		X					X	
MARAV													
SF 1449	X	X	X	X	X		X					X	
Basic Agreement	X	X	X	X	X		X					X	
Basic Order Agreement	X	X	X	X	X		X					X	
MARAV													
External Awards	X	X	X	X	X		X					X	

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
SF 252	X	X	X	X	X		X					X	
SF 1449	X	X	X	X	X		X					X	
SF 1442	X	X	X	X	X		X					X	
SF 26	X	X	X	X	X		X					X	
SF 33	X	X	X	X	X		X					X	
DD 1155	X	X	X	X	X		X					X	
FPDS Reports	⊘	⊘	⊘	⊘	⊘		⊘					⊘	
DD Form 1057	⊘						⊘						
DD Form 350	⊘	⊘	⊘	⊘	⊘		⊘					⊘	
Audit Tracking	X	X	X	X	X	X	X	X			X	X	
Vendor Dispute Tracking	X	X	X	X	X	X	X	X			X	X	
Post-Award	X	X	X	X	X	X	X					X	
Modification (SF 30)	X	X	X	X	X		X					X	
View Next Available SPIIN	X	X	X	X	X	X	X					X	
Modification Linking	X	X	X	X	X		X					X	
Multiple Contracts Modification	X	X	X	X	X		X					X	
Orders	X	X	X	X	X		X					X	
FSS Order/DO/TO (DD 1155)	X	X	X	X	X		X					X	
Commercial FSS Order/DO/TO (SF 1449)	X	X	X	X	X		X					X	
SF 252 External DO	X	X	X	X	X		X					X	
SF 1449 External DO	X	X	X	X	X		X					X	
SF 1442 External DO	X	X	X	X	X		X					X	
SF 26 External DO	X	X	X	X	X		X					X	
SF 33 External DO	X	X	X	X	X		X					X	
DD 1155 External DO	X	X	X	X	X		X					X	
Agreement Orders/ Contracts	X	X	X	X	X		X					X	
DD 1155	X	X	X	X	X		X					X	
SF 26	X	X	X	X	X		X					X	
SF 1449	X	X	X	X	X		X					X	
Telecommunications Order	X	X	X	X	X		X					X	
BPA Call	X	X	X	X	X		X					X	
Imprest Fund Management							⊘						

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
Award Status	X	X	X	X	X	X	X	X	X	X	X	X	X
Agreement Status	X	X	X	X	X	X	X	X	X	X	X	X	X
Vendor Performance	X	X	X	X	X	X	X	X			X	X	
Audit Tracking	X	X	X	X	X	X	X	X			X	X	
Vendor Dispute Tracking	X	X	X	X	X	X	X	X			X	X	
Closeout	X	X	X	X	X		X					X	
Contract Completion Statement (DD 1594)	X		X	X	X		X					X	
Contract Closeout Checklist (DD 1597)	X		X	X	X		X					X	
Retention End	X	X	X	X	X		X					X	
Closeout Award	X	X	X				X						
Termination	⊘	⊘	⊘				⊘						
Terminate	⊘	⊘	⊘				⊘						
Rescind Termination							⊘						
No Cost Cancellation	X	X	X				X						
Agreement Discontinuation	X	X	X				X						
Discontinue	X	X	X				X						
Rescind Discontinuation	X	X	X				X						
Contract Data Cover Sheet	X	X	X	X	X		X					X	
Delivery	X	X	X	X	X		X		X			X	
Add Delivery	X	X	X	X	X		X		X			X	
Modify Delivery	X	X	X	X	X		X		X			X	
Discrepancy Report	X	X	X	X	X		X		X			X	
Add Discrepancy Report	X	X	X	X	X		X		X			X	
Modify Discrepancy Report	X	X	X	X	X		X		X			X	
Summary Report	X	X	X	X	X		X		X			X	
Payment Request	X	X	X	X	X		X			X		X	
Add	X	X	X	X	X		X			X		X	
MODIFY	X	X	X	X	X		X			X		X	
Payment	X	X	X	X	X		X			X		X	
Add	X	X	X	X	X		X			X		X	

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
Modify	X	X	X	X	X		X			X		X	
Tracking Source	X	X	X	X	X		X		X	X		X	
Validate Funds	X	X	X	X	X	X	X		X	X		X	
Generate Document	X	X	X	X	X		X					X	
Approvals	X	X	X	X	X		X					X	
Release		X	X										
Estimate, Proposal, and Negotiation	X	X	X	X	X		X					X	
Government Estimate	X	X	X	X	X		X					X	
Contractor Proposal	X	X	X	X	X		X					X	
Technical Analysis Report	X	X	X	X	X		X					X	
Audit	X	X	X	X	X		X					X	
Objective	X	X	X	X	X		X					X	
Negotiation	X	X	X	X	X		X					X	
Pre-/Post-Negotiation Position	X	X	X	X	X		X					X	
Milestone Plan	X	X	X	X	X	X	X					X	
Checklist	X	X	X	X	X	X	X					X	
Contract Distribution List	X	X	X	X	X	X	X					X	
Correspondence Log	X	X	X	X	X	X	X					X	
Memorandum of Agreement	X	X	X	X	X	X	X	X			X	X	
Attachment	X	X	X	X	X	X	X	X	X	X	X	X	X
New	X	X	X	X	X	X	X	X	X	X	X	X	X
Information	X	X	X	X	X	X	X	X	X	X	X	X	X
Analyze	X	X	X	X	X	X	X	X			X	X	
Customer Feedback Form	X	X	X	X	X	X	X	X	X	X	X	X	X
Tracking Codes	X	X	X				X						
Document Chain Information	X	X	X	X	X	X	X	X	X	X	X	X	X
Document Rename/Renumber	X	X	X	X	X	X	X	X	X	X	X	X	X
Reports	X	X	X	X	X	X	X	X	X	X	X	X	X
Workload Management	X	X	X				X						
Automatic Assignment	X	X	X				X						
Assign	X	X	X				X						
Configuration Parameters	X	X	X				X						
User Workload	X	X	X	X	X	X	X					X	
Utilities	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**

Groups:	***MGT***	***SAP CO***	***LG CO***	***CS***	***CN***	***Support***	***SA***	***Review***	***Customer***	***Finance***	***MAJCOM***	***XXX SS***	***XXX Team***
Document Import	X	X	X	X	X	X	X	X	X	X	X	X	X
Document Export	X	X	X	X	X	X	X	X	X	X	X	X	X
Word Processing	X	X	X	X	X	X	X	X	X	X	X	X	X
Spreadsheet	X	X	X	X	X	X	X	X	X	X	X	X	X
Alert	X	X	X	X	X	X	X	X	X	X	X	X	X
Create	X	X	X	X	X	X	X	X	X	X	X	X	X
Alert Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
System Administration							X						
Organization Maintenance	X	X	X	X	X	X	X						
Vendor Maintenance	X	X	X	X	X	X	X						
Other Organization Maintenance						X	X						
Preferences	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
External Interface													
Issue Tracker	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Toolbar	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Window	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**
Cascade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Layer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tile	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Tile Horizontal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Arrange Icons	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Help*	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**	**XXX**
PD^2 Advisor	X	X	X	X	X	X	X	X	X	X	X	X	X
How Do I?	X	X	X	X	X	X	X	X	X	X	X	X	X
Glossary	X	X	X	X	X	X	X	X	X	X	X	X	X
Release Notes	X	X	X	X	X	X	X	X	X	X	X	X	X
Data Model	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘	⊘
Using Help	X	X	X	X	X	X	X	X	X	X	X	X	X
About PD^2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

☐ XX = Menus/menu items all users may access & are not configurable.
☐ = Denotes an item for which prior access was permitted, but now has been denied.
☐Visual clue that item is top-level menu.

X

⊘

☐Visual to show items within box belong to same top level menu.

*Vista Users:

Note: The PD2 Help Files also do not work on clients running VISTA. The AFCST reworked the files to be compatible with VISTA. They will no longer be within PD2, but are now a separate application that can be hosted on a shared drive or on each PC. The files are accessible at the Contracting Systems/HIBB website: https://afcis.gunter.af.mil/Files/Library/fernandezj/PD2_Help.zip

PD2 v4.2 Increment 2 SR10 will operate in a Microsoft Windows Vista (FDCC 2.x) environment, but there are a few small issues you should be aware of as follows:

a. The PD2 application will launch Microsoft Word in the background as a minimized window. This occurs when generating documents, when launching Word Processing via the Utilities menu, and when editing CLIN templates. If the task bar is visible, you will see the application flashing, and know that it was launched. You can then access Word from the task bar, or by using Alt-Tab to switch programs.

b. Scroll bars on PD2 folders and cabinets will be partially hidden. That being said, you will still be able to operate the scroll bars (there's just a little less of the scroll bar for you to grab onto).

c. You will receive a ***macro 1037 error*** when you click **Help > How Do I?** from the menu bar. When you click through the error dialogue, the help screens will appear as expected.

d. You will not be able to open PD2 Advisor, but you can gain limited access to the **Functional User**, **System Administrator**, and **FPDS Reports** help screens by first clicking **Help > Using Help** from the menu bar, and then clicking **Yes** to the **WinHlp32.hlp** prompt. Open **pd2sysad.hlp** for **System Administrator**, **pd2user.hlp** for **Functional User**, and **FPDS_Pd2.hlp** for **FPDS Reports** (click **OK** to the **macro 1037 error** messages). **NOTE: The *Help Topics* button will not work, and you cannot view the *How Do I?* topic drop-down list.**

TABLE 2: STANDARD SECURITY MODEL CLASS ACCESS FOR GROUP

Note: Read access is added by adding the group

R= Read
W=Write
M=Drag(Move)
D=Delete

CLASS ACCESS FOR GROUP: MGT

CLASS OF OBJECTS

	MGT	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
	MGT	**RW/M-**	**RW/M-**	**RW/M-**	**RW/ M-**	**RW/MD**	**RW/M**	**RW/M -**
	SAP CO	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	LG CO	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	CS	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
OWNING GROUP	CN	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	SUPPORT	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	REVIEW	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	CUSTOMER	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	SA	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	FINANCE	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	MAJCOM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the MGT group have:

- ❑ Write and Delete access to their own desktop containers
- ❑ Read access to other groups' documents except XXX Source Selection group
- ❑ Drag (Move) access for all documents on all desktops except XXX Source Selection group
- ❑ Write access for all classes on their own desktop
- ❑ As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: SAP CO

CLASS OF OBJECTS

	SAP CO	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	SAP CO	**RW/--**	**RW/--**	**RW/--**	**RW/--**	**RW/-D**	**RW/--**	**RW/--**
	LG CO	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	CS	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	CN	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	SUPPORT	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	REVIEW	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	CUSTOMER	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	MAJCOM	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the SAP CO group have:

- ❑ Write access for all classes on their own desktops
- ❑ Delete access to their own desktop containers
- ❑ Read access to other groups' documents except SA and XXX Source Selection groups
- ❑ Read and Drag (Move) access to documents within XXX Team cabinets
- ❑ As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: LG CO

CLASS OF OBJECTS

OWNING GROUP

LG CO	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
MGT	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
SAP CO	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
LG CO	**RW/--**	**RW/--**	**RW/--**	**RW/--**	**RW/-D**	**RW/--**	**RW/--**
CS	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
CN	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
SUPPORT	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
REVIEW	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
CUSTOMER	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
FINANCE	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
MAJCOM	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--	R-/--
XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the LG CO group have:

- Write access for all classes on their own desktops
- Delete access to their own desktop containers
- Read access to other groups' documents except SA and XXX Source Selection groups
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: CS

CLASS OF OBJECTS

	CS	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	**RW/--**	**RW/--**	**RW/--**	**RW/--**	**RW/-D**	**RW/--**	**RW/--**
OWNING GROUP	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the CS group have:

- Write access for all classes on their own desktops
- Write and Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: CN

CLASS OF OBJECTS

	CN	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	**RW/--**	**RW/--**	**RW/--**	**RW/--**	**RW/-D**	**RW/--**	**RW/--**
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the CN group have:

- Write access for all classes on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: SUPPORT

CLASS OF OBJECTS

	SUPPORT	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	**RW/--**	**RW/--**	**RW/--**	**RW/--**	**RW/-D**	**RW/--**	**RW/--**
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the SUPPORT group have:

- ❑ Write access for all classes on their own desktops
- ❑ Delete access to their own desktop containers
- ❑ Read and Drag (Move) access to documents within XXX Team cabinets
- ❑ As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: REVIEW

CLASS OF OBJECTS

OWNING GROUP	**REVIEW**	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	**R-/--**	**R-/--**	**R-/--**	**R-/--**	**RW/-D**	**RW/--**	**R-/--**
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the REVIEW group have:

- Write access to Desktop and General class objects on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: CUSTOMER

CLASS OF OBJECTS

	CUSTOMER	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	**RW/--**	**RW/--**	**R-/--**	**R-/--**	**RW/-D**	**RW/--**	**R-/--**
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the CUSTOMER group have:

- Write access for Funding, Requirements, Desktop, and General on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: SA

CLASS OF OBJECTS

OWNING GROUP

SA	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
MGT	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
SAP CO	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
LG CO	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
CS	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
CN	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
SUPPORT	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
REVIEW	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
CUSTOMER	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
SA	**RW/MD**	**RW/MD**	**RW/MD**	**RW/MD**	**RW/MD**	**RW/MD**	**RW/MD**
FINANCE	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
MAJCOM	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD
XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
XXX TEAM	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD	RW/MD

SUMMARY RULES: Users in the SA group have:

- Read, Write, Drag (Move), and Delete access to all classes on all desktops except XXX Source Selection group
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: FINANCE

CLASS OF OBJECTS

	FINANCE	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	**RW/--**	**R-/--**	**R-/--**	**R-/--**	**RW/-D**	**RW/--**	**RW/--**
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the FINANCE group have:

- Write access to Desktop, General, Funding, and Funds on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: MAJCOM

CLASS OF OBJECTS

OWNING GROUP	**MAJCOM**	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	**R-/--**	**R-/--**	**R-/--**	**R-/--**	**RW/-D**	**RW/--**	**R-/--**
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the MAJCOM group have:

- Write access to Desktop and General class objects on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: XXX SOURCE SELECTION

CLASS OF OBJECTS

	XXX SS	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	**RW/M-**	**RW/M-**	**RW/M-**	**RW/M-**	**RW/MD**	**RW/M-**	**RW/M-**
	XXX TEAM	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-	R-/M-

SUMMARY RULES: Users in the XX X SOURCE SELECTION group have:

- Read, Write, and Drag (Move) access for all classes on their own desktops
- Delete access to their own desktop containers
- Read and Drag (Move) access to documents within XXX Team cabinets
- As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

CLASS ACCESS FOR GROUP: XXX TEAM

CLASS OF OBJECTS

	XXX TEAM	FUNDING	REQMT	PREAWD/AWD	POST AWD	DESKTOP	GENERAL	FUNDS
OWNING GROUP	MGT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SAP CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	LG CO	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CN	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SUPPORT	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	REVIEW	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	CUSTOMER	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	SA	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	FINANCE	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	MAJCOM	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX SS	--/--	--/--	--/--	--/--	--/--	--/--	--/--
	XXX TEAM	**R-/M-**	**R-/M-**	**R-/M-**	**R-/M-**	**R-/M-**	**R-/M-**	**R-/M-**

SUMMARY RULES: Users in the XXX TEAM group have:

- ❑ Read access to documents within the XXX Team group

Note: The purpose of this secondary group is to assign merely read access to documents within a team group. Users would then drag documents from a team cabinet onto their own desktops to activate document access as established by primary group membership

- ❑ As mentioned in the Air Force Security Model blanket rules, because the XXX Team represents optional teams, the Air Force Standard Data load does not contain the read and drag rights to XXX Team as annotated in the table above. Once you create teams, you will need to associate class access to those teams accordingly, and may use the table above for guidance

Group Access to Reports

Access to Cognos reports is assigned at the group level, with individual write and run privileges designated at the user level. The following list describes a baseline for assigning group access to various reports according to the Air Force Security Model. Again, once group access is established, you may then determine write or read (run) rights to those reports at the user level. Since users may have varying access to report information, those reports run by system administrators, or users with system administration report access, will capture the most complete results from available data.

Report Name	Groups with Report Access
Performance History	Mgt, SAP CO, Large CO, CS, CN, SA, Review, MAJCOM, XXX Source Selection
Awards Summary	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Awards by Vendor CAGE	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Associated CORs	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Contract Close-Out Status	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Contract List	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Contracting Officer Totals	Mgt, SAP CO, Large CO, SA
MOA Detail	Mgt, SAP CO, Large CO, SA
Audit Actions	Mgt, SAP CO, Large CO, SA
Dispute Action	Mgt, SAP CO, Large CO, SA
Workload Totals	Mgt, SAP CO, Large CO, SA
Workload Detail	Mgt, SAP CO, Large CO, SA
Detailed Contracts	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
Contract Modifications	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection
PR Status	Mgt, SAP CO, Large CO, CS, CN, SA, XXX Source Selection

6-1.2.5 Security Model Final Checks

If you do adjust the Air Force Standard Security Model, check for these common problems and errors:

Allowing a group to create objects for which they lack Write access: This should be avoided whenever possible by ensuring that the class assigned to the object type for this group is the one to which the group has Write access.

Undeletable object classes: At least one group should have the Delete privilege for a given class in the system. Otherwise objects in that class can never be deleted.

Bad combinations of drag and delete privileges: If user has Delete privileges for an object class on his/her own desktop but not in another group, yet also has the Drag privilege, he/she can drag the object to his/her own desktop and delete it there.

Forgetting to include a system administrator group: There should always be a group with Drag and Delete privileges for most documents in the system to facilitate trouble-shooting.

Not defining a class for every object that members of the group can create through the menu: The user will receive an error message if he/she selects a menu option to create a form for which he/she has not default class assigned.

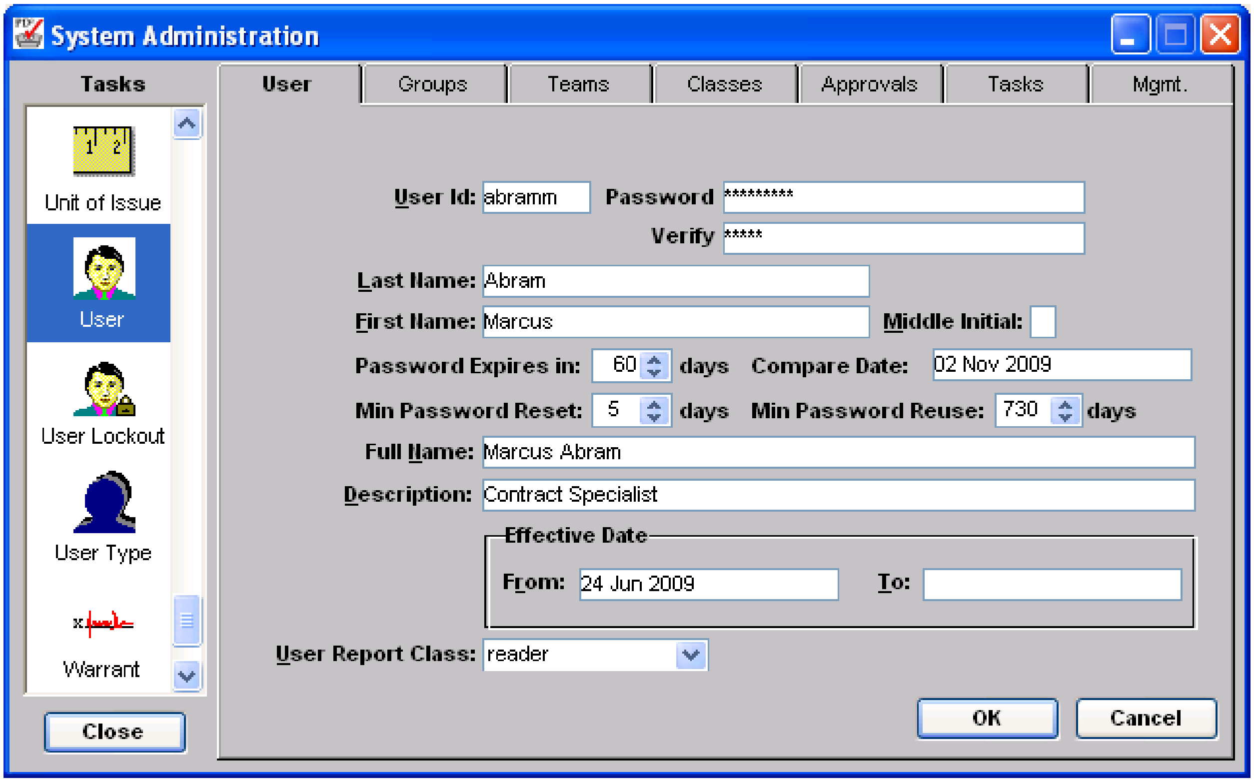
6-1.2.6 Standard User Profiles

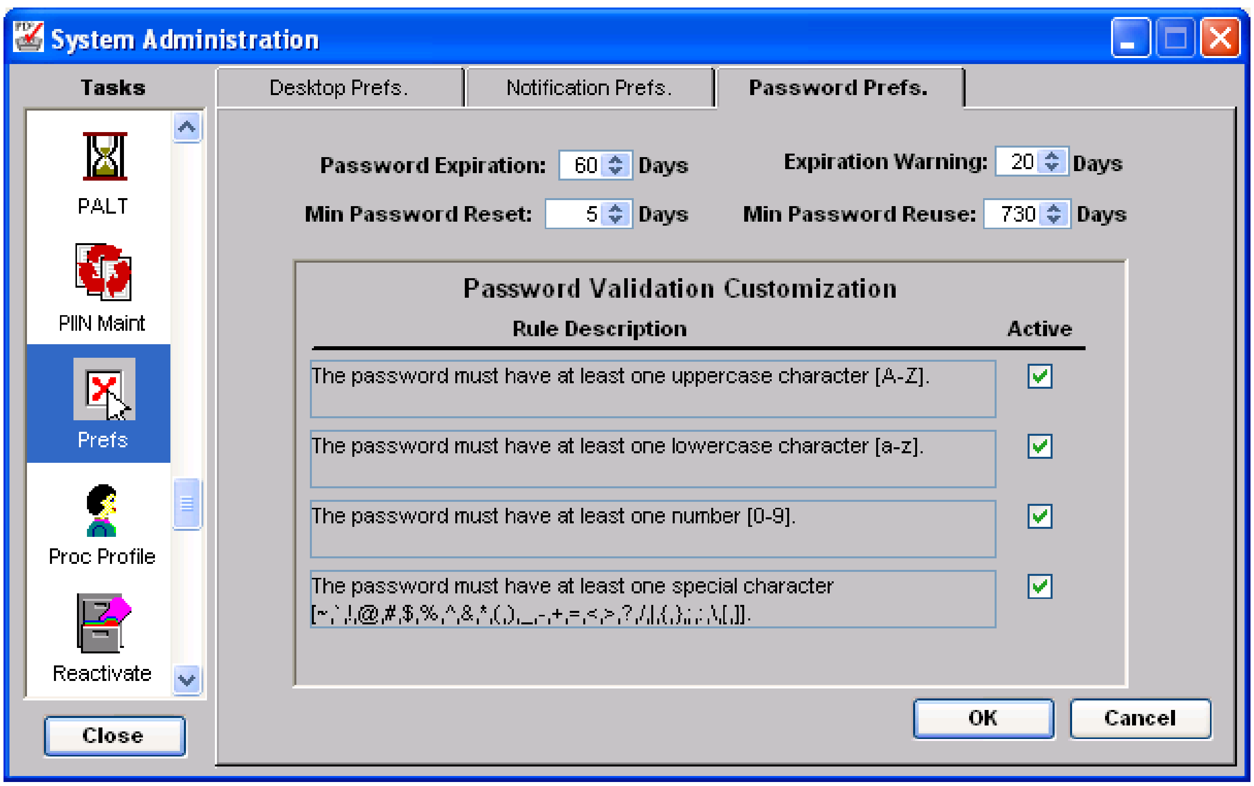
Sites may utilize the table below as a guideline for populating the minimum requirements for site-specific Team, User, and Procurement Profile information. The table lists the System Administration task, the order in which they should be accessed, and the fields to populate for proper PD^2 user functionality. While sites may choose to store information in additional System Administration fields, this table outlines the minimal mandatory input per user.

As noted in the Security Model Rules to Remember, PD^2 is installed with a sysadmin user and group. To include the sysadmin user into the Air Force Security Model, be sure the sysadmin user's primary group is checked for SA and that the default "sysadmin" group is a secondary group for the sysadmin user. The default user sysadmin will serve as the recipient of inbound interfaced information.

The System2 Team, on the other hand, is primarily only for the use of System Administrators and may or may not be used according to local site preferences. Due to its dependency on individual user information, the Team Task requires manual input. The table below lists instructions for adding teams and team cabinets. If you wish to add your own team cabinet, follow the directions under the Team Task in the table below. Create a new team, assign a team leader, include all users in the team, and then create a cabinet for the team. You may then determine read/write/drag/delete access for the team using the tables appearing earlier in this section for guidance. Refer to the Teams concept discussion, found later in this Chapter, as well for additional guidance on adding teams and cabinets.

Note:
The following two screen shots were copied from PD2, Utilities, System Administration, user and preference tabs:


System Administration
Tasks
User
Groups
Teams
Classes
Approvals
Tasks
Mgmt.
Unit of Issue
User
User Lockout
User Type
Warrant
Close
User Id: abramm
Password
Verify
Last Name: Abram
First Name: Marcus
Middle Initial:
Password Expires in: 60 days
Compare Date: 02 Nov 2009
Min Password Reset: 5 days
Min Password Reuse: 730 days
Full Name: Marcus Abram
Description: Contract Specialist
Effective Date
From: 24 Jun 2009
To:
User Report Class: reader
OK
Cancel


System Administration
Tasks
Desktop Prefs.
Notification Prefs.
Password Prefs.
PALT
PIIN Maint
Prefs
Proc Profile
Reactivate
Close
Password Expiration: 60 Days
Expiration Warning: 20 Days
Min Password Reset: 5 Days
Min Password Reuse: 730 Days
Password Validation Customization
Rule Description
Active
The password must have at least one uppercase character [A-Z].
The password must have at least one lowercase character [a-z].
The password must have at least one number [0-9].
The password must have at least one special character
OK
Cancel

SA Task	**Tab**	**Mandatory Fields**	**Comments**
Prefs	Password Prefs.		
		Password Expiration	60 Days (mandatory)
		Expiration Warning	20Days (recommended)
		Password must have at least one upper case character	Active (mandatory)
		Password must have at least one lower case character	Active (mandatory)
		Password must have at least one number.	Active (mandatory)
		Password must have at least one special character.	Active (mandatory)
User	User	User ID	Enter user Id as appropriate (max: 8 characters). User ID is the user's last name, first letter of first name and is case sensitive
		Password	Enter temporary password. Passwords are 9-12 characters in length. They are case sensitive and must have at least one upper case, one lower case, one numeric, and one special character.
		Verify	Verify temporary password.
		Last Name	Enter user's last name.
		First Name	Enter user's first name.
		Middle Initial	Middle initial is not required but is recommended.
		Password Expired In:	60 Days
		Compare Date	Do not change the value of this field. This date is automatically set when the user is created and is later automatically updated when he changes his password.
		Full Name	Enter Full Name to represent how user's name will appear on PD² generated

SA Task	Tab	Mandatory Fields	Comments
			documents.
		Description	Enter user's job description as appropriate.
		Effective Date	The **From** field defaults to today's date. Leave the To field blank unless user is temporary.
		User Report Class	**reader: run existing reports . writer: create /modify and run reports admin: combines reader and writer and allows access to security catalog**
	Groups		Select user's group(s) from the list of Air Force standard groups in the left column and add to **User's Groups** in the right column. You must select at least one group per user and designate one group as the primary group. The Group that a user is assigned to normally corresponds to his role in the organization (e.g., contracting officer, buyer, clerk, etc.). Each user must be a member of the Team Group.
	Teams		Select user's team(s) from the list of teams shown in the left column and add to User's Team in the right column. The Team that a User is assigned to normally corresponds to the organization to which he is assigned (e.g., services branch, construction branch, commodities branch, etc.).
	Classes		The selections under this tab limit a user's system capabilities to something less than what he would be ordinarily entitled to as a member of his Group. As such, this tab is seldom used.
	Approvals		Assignment of approval authority codes is required for users with approval authority. Select a user's approval authority from the list of Air Force standard authority codes in the left column and add to **Assigned Authority Codes** in the right column. You may select one or multiple authority codes. The Approval Authority Codes that are assigned to a user normally corresponds

SA Task	Tab	Mandatory Fields	Comments
			to his role in the organization (e.g., contracting officer, buyer, clerk, etc.) and all lesser roles as well. For example, a buyer should be granted both CS and Clerk approvals and a Contracting Officer with unlimited warrant authority should be granted CO(U), CO(L), CS, and Clerk approvals.
	Task		Add SA Task that user will be required to perform.
	Mgmt.		Add PD² Users that this user would manage their work load. This tab is used to set the parameters for Automatic Workload assignment, if that is used at your location.
			Procurement Profiles are mandatory for users who will create solicitation and award documents as well as warranted users. Note: you cannot create a profile for the system default user **sysadmin**.
Proc Profile (User Procurement Profile)	User	User	You may only create profiles for existing PD² users displayed in the drop-down list.
		Address	Select the **Add** button on the **User** tab which, in turn, will bring up the **Address** Search dialog box. Retain the **Search By** default value of **Organization Name** and enter your user's Contract Organization in the **Search Criteria** box in front of the "%" sign (e.g., %OC-ALC/PK%) Highlight an "approved" address and then click on the **Select** button. An **Address Layout Details** dialog box will appear and when it does, click on the **OK** button to confirm your selection. You then will return to the **User** tab and the **Address** block will now contain the value you've chosen. (Note: Be sure that the organization selected has a DODAAC code for the value of that organization's **DODAAD/UIC/DoDAAN** field rather

SA Task	Tab	Mandatory Fields	Comments
			than its UIC.
		Phone	Commercial phone numbers are required for population of contract documents.
		Fax	Commercial fax numbers are required for population of contract documents.
		E-mail	Insert the user's e-mail address
		Default DoDAAN	Select appropriate DoDAAC
		Call/Order Code	This is automatically filled in by the system when the default DoDAAC is selected.
		Employee Code	This field is not used.
		Payment Plan	This field is not used.
		Occupation Series	This field is not used.
		Grade	This field is not used.
		PCO Code	This field is reserved for future use by the Reports Working Group.
		ACO Code	This field is reserved for future use by the Reports Working Group.
	Warrant		Warrant assignment is mandatory for warranted users.
		Warrant	Select a warrant from the available Air Force standard warrants in the drop-down list.
		Warrant number	Enter warrant number.
		Issue date	**Issue date** defaults to today's date. If the warrant's issue date is to occur in the future, change to the desired date of issue.
		Receive date	Insert the date from previous **Issue Date** field.
		Status	Select appropriate warrant status from the drop-down list. The status assigned is generally "Active".
		Status date	**Status Date** populates according to the **Status** field.
		Issuing organization	Click **Add** to launch Organization Maintenance from which to select or add a desired address.
	Certifications		Use of this tab is optional. See **PD^2 Advisor** for additional guidance.
	Areas of Expertise		Use of this tab is optional. See **PD^2 Advisor** for additional guidance.

6-1.3 SPS USER ADMINISTRATION

Each PD² user must be assigned to at least one security group to define their document and menu access privileges. Each user should be assigned to one or more groups depending on his/her roles within the organization.

6-1.3.1 Assign Users to Security Groups

When loading a new user in PD2 the following data may be required:

User ID (Maximum of 8 characters)	Password (9-12 characters)
Last Name	First Name
Middle Initial	Full Name
Title	Effective From
Effective To	Group(s)
Team(s)	Approval Authorities
System Administration Task(s)	Warrant
People to Assign Work	Warrant Number
Warrant Issue Date	Warrant Issuing Organization
Warrant Status	PIIN Unit Identification Code (Activity Address Number)

Refer to the PD^2 Advisor for additional information on User Set-Up.

6-1.3.2 Users


User

The User task defines who is in the system. There are seven “tabs” in the User Task accessible to System Administrators defined below:

Tab	Description
USER	The system administrator enters each user’s individual information, (e.g., name and password).
GROUPS	The system administrator assigns each user to a Primary group, and possibly secondary groups. CACI has indicated that each user must be assigned to the “Team” Group in addition to their Primary Group.
TEAMS	Users may belong to specific teams within PD^2. More guidance is offered later in this part on recommended team structure.
CLASSES	Group access rights are restricted, if necessary, at the user level on the Classes tab. This tab is optional and is used only for exceptions to the access rights a user automatically receives on assignment to the Group in question.
APPROVALS	Each user can be assigned an Authority code for Approval rights. The Approval Authority Codes that are assigned to a user normally

	corresponds to his role in the organization (e.g., contracting officer, buyer, clerk, etc.) and all lesser roles as well. For example, a buyer should be granted both CS and Clerk approvals and a Contracting Officer with unlimited warrant authority should be granted CO(U), CO(L), CS, and Clerk approvals.
TASK	Each user can be assigned access to all of or individual task contained in the System Administration module. System administrators will be given access to all available task.
MGMT	The system administrator must assign users and/or user types to specific managers for workload management. This tab is used to set the parameters for Automatic Workload assignment, if that is used at your location.

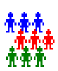
The Air Force standard for user logons is the user's last name and first letter of the first name. If this creates duplicate IDs, the user ID will be the user's last name and first two letters of the first name.

Refer to the PD2 Advisor for more information on creating Users and User Types.

6-1.3.3 User Type

The User Type task establishes the business titles in a typical Contracting Office (i.e. Contracting Officer, Contract Administrator, etc.).

6-1.3.4 Groups



The Group task supports the Menu and Object security features of PD². Every user must belong to at least one, Primary group as well as the "Team" Group (per CACI). Each group has certain rights with regard to viewing, creating, modifying, deleting, and dragging documents. Users assigned to a particular group will inherit the associated common access rules (and Menu options) defined for the group by the system administrator. Please refer to para 6-2.1.3 for further detail on the baseline Air Force Group structure.

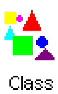
There are five "tabs" on the Group task for establishing group security:

Tab	Description
GROUP	A collection of users who share access rules. Groups are generally based on common functional roles.
USERS	A selection of users assigned to a particular group.
CLASS ACCESS	Individual users inherit their access rights to an object class based on the Primary Group to which they belong. Class Access determines their privileges to an object viewed from the search results window or when it reaches their desktops.

	The addition of an owning group and class provides read access. For additional rights the following checkboxes apply: Write - Specifies whether the user has privileges to update an object of the selected Class Drag (Move) - Specifies whether the user may drag an object of the selected Class from the Search Results window to the desktop Delete - Specifies whether the user can delete an object of the selected Class.
MENU	The Menu tab allows access to various Menu options (functions) for the group. See the spreadsheets above for details on Menu access.
OBJECT CLASSES	A Class is assigned to each object Type (container or document) a group can create. This is the class an object will have when users in the Primary Group create an object.

Note:
Sites are able to add more Groups as necessary, additional classes and groups with access distinctions may complicate security model maintenance.

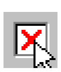
6-1.3.5 Classes



All documents and objects (e.g., cabinets, etc.) are assigned to a Class. A Class is similar to a category. Groups are assigned rights (e.g., to read, write, drag [move] or delete) to that Class or category of document objects. Classes are defined when objects are created, such as when a user creates a Purchase Request. The seven pre-loaded Classes include:

- Desktop Container Objects
- Funding
- Funds Certification [Reserved]
- General
- Post-Award
- Pre-Award/Award
- Requirements

6-1.3.6 User Preferences



Preferences are a set of options that define default settings for your Desktop. System administrators can set default preferences specifying that PD^2:

Ask for confirmation before exiting
Automatically save your configuration before exiting
Set inactivity logout delay
Notify you when new documents are placed in your Inbox
Delay checking your Inbox for a specified period of time

Delay moving documents from your Outbox for a specified period of time

Forward your mail to another user while you are away from the office

Set auto-ordering preference, establish levels of award creation

Set auto-validation of payment requests

Set auto sort document so clauses and text boxes are sorted properly. Note: If a user manually sorts anything in the clauses tab, if this is checked, everything will move back to the way PD2 sorts which is not what some users will want (they would need to uncheck the box when generating their document).

Set Display FPDS-NG CAR pre-fill data

Notify you when a task passes its expected completion date, when a new task has been received, or when an existing task has been deleted or reassigned to another user

Password preferences set up (such as number of days until password expiration, number of days of warning prior to expiration, and selection of password validation rules). Changing these will violate current Air Force Security Guidelines.

6-1.3.7 Procurement Profile

The system administrator must gather contact, user ID, and password information for every user requiring entry into the database. PD² validates warrant level authority when releasing documents. The system administrator must gather warrant levels for each user, as well as essential Activity Address Number, user certifications and areas of expertise, for entry into the database. System administrators can configure user's Procurement Profiles according to the following four tabs:

USER – Establishes a default address, phone, PIIN, Activity Address Number and other similar data for each user

WARRANT - Assigns Warrants to users, enabling them to release award documents

CERTIFICATIONS (optional) - Identifies user certifications for FSC, SIC, WSC and Program Codes

AREAS OF EXPERTISE (optional)- Identifies user areas of expertise

Due to the importance of information captured under Procurement Profile, sites should examine user information carefully and complete the User and Warrant tabs as much as possible. Without proper Activity Address Number information, documents may not be correctly numbered, and without warrant information, users will not be able to release documents.

6-1.3.8 Team

PD² offers flexibility in organizing the desktop, naming and numbering conventions and establishing teams. In order to facilitate document tracking and enforce baseline user guidance, the system administrator should review the site's organizational structure and establish site conventions and a team structure to support PD² contracting activities. The system administrator sets up team cabinets, team leaders, and team members. Below is the baseline cabinet structure (also referred to as the office set-up) recommended by the Air Force.

Site Cabinets	**Site Cabinet** (safety briefings, sales catalogues, office procedures…) **Cancelled PRs** (with Folders by Team) Ready for Staging (for system administration action) **Trash** (for deletion by the System Administrator) **Open PRs**
Division/Flight Cabinets	**Active Awards** **Closed Contracts**
Team Cabinets	**Contract Specific Teams** **Ad Hoc Teams** (Review, Source Selection, Unit Self-Inspection, etc.)
Personal Cabinets	**Own Name** (typically a single cabinet, foldered)

Notes:

This is the basic cabinet structure per office. Larger offices may require additional cabinets to accommodate greater workflow (e.g., a BPA cabinet with folders by Master and Call, Active Awards cabinets for PO/DO/FSS, etc.).

Only the system administrator should exercise immediate Delete privileges, resulting in a requirement for a site “Trash” cabinet. Everyone can send documents to the “Trash” cabinet, but only the system administrator can empty the trash.

Team leaders must be given access to team cabinets in order for them to be able to see the cabinet on their desktop.

Per CACI, all Teams must have a designated Team Group of “Team” Groups may serve as secondary groups, to create a read-only environment when viewing documents within a team cabinet. This feature would require users to remove documents from the Team cabinet and onto their own desktops in order to work within the documents. By dragging those documents to their desktops, users would then activate their Primary Group access rights.

Close-Out Cabinets may be divided by Folders or split by Fiscal Year and/or Contract Type/Retention Period/Flights/Type of Action (e.g., FY/Branch/Retention).

6-1.4 CLAUSES AND CLAUSE LOGIC

Topics	Resource	Comments
Clause Logic	Reference LibraryPD2 Clause Logic – The System Administrator’s	For additional guidance on the specifics of the Air Force utilization of Clause Logic and its associated task, refer to the Air Force FAR site at: http://farsite.hill.af.mil/clauselogic/Clauselogic.html

	Perspective	
Clause Task	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	The Clause task contains both FAR and DFARS clauses that are pre-loaded into the PD² database. Each clause is associated with a clause rule that determines when it can be applied to a solicitation or a contract using the Auto Select Clause feature. In addition, the section clause location in different contract formats can be assigned in the task.
Clause Formatting	6-2.3.1	See Below
Clause Rule	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	The Clause Rule feature determines clause selection. This task establishes the rule, associated data criteria characteristics, and clauses. The feature also provides the ability to build the query select statement to automatically pull in the clause when creating the solicitation or award. Clause rules for FAR and DFARS clauses are included in PD².
Characteristics	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	The Characteristics task is a tool to refine clause selection based on established categories, such as product or competition type. PD² has an initial group of Characteristics established, yet the Air Force may elect to create additional characteristics to support local clauses
Format	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	Prior to document generation, PD² allows the end user to select the format of the document. The formats available are determined by those provided in the Standard System data set and the system administrator in the Format task. This enables you to create, modify, or delete contract formats.
CLIN Templates	PD2 Advisor System Administration -	Note; Do not edit standard CLIN templates
Automatic Clause Selection	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective; PD2 Advisor-Functional User	
Clause Logic Examples	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	
Creating a new Data Criteria	Reference LibraryPD2 Clause	

	Logic – The System Administrator's Perspective	
Creating a new Characteristic	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	
Replacement Clause Logic for PD2 clause Rule	Reference LibraryPD2 Clause Logic – The System Administrator's Perspective	

6-1.4.1 Clause Formatting

Following are formatting instructions to be applied when entering clauses into PD². These instructions will ensure that manually entered clauses appear in the same typeface and layout as the system-driven clauses:

- ❑ All text is in Times New Roman font.
- ❑ All text is in font size 10.
- ❑ All title lines are capitalized, with the exception of an alternate clause number.
- ❑ There is a line space between the title and the clause text.
- ❑ All paragraphs and subparagraphs are left justified.
- ❑ Paragraphs and subparagraphs have no indentation.
- ❑ There is a blank line at the end of the clause text.

For example, FAR 52.203-3 appears as follows:

52.203-3 GRATUITIES (APR 1984) *[There are 6 spaces between the clause and the text]*

(a) The right of the Contractor to proceed may be terminated by written notice if, after notice and hearing, the agency head or a designee determines that the Contractor, its agent, or another representative--

1. Offered or gave a gratuity (e.g., an entertainment or gift) to an officer, official, or employee of the Government; and
2. Intended, by the gratuity, to obtain a contract or favorable treatment under a contract.

(b) The facts supporting this determination may be reviewed by any court having lawful jurisdiction.

(c) If this contract is terminated under paragraph (a) of this clause, the Government is entitled –

1. To pursue the same remedies as in a breach of the contract; and

2. In addition to any other damages provided by law, to exemplary damages of not less than 3 nor more than 10 times the cost incurred by the Contractor in giving gratuities to the person concerned, as determined by the agency head or a designee. (This subparagraph (c)(2) is applicable only if this contract uses money appropriated to the Department of Defense.)

(d) The rights and remedies of the Government provided in this clause shall not be exclusive and are in addition to any other rights and remedies provided by law or under this contract.

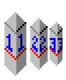
The title line of FAR 52.202-1 Alternate I appears as follows:

52.202-1 Alt I DEFINITIONS (OCT 1995) - ALTERNATE I (APR 1984)

Clauses in the standard numbered format displayed in the Clause Administration task are sorted first by regulation, then by section, subsection, and finally by clause number. For example, if "X" represents the regulation, "Y" represents the section, "Z" represents the subsection, and "AAA" represents the clause number, then the standard numbered format for a clause would be "X.Y-Z AAA." Any "non-standard" clauses (i.e. not in the format "number.number-number" or "number-number.number-number") are sorted alphabetically after clauses in the standard numbered format. For proper EDI transmission of local clauses, be sure to identify the fill-in boxes of newly created clauses.

6-1.5 MILESTONE PLANS AND CHECKLISTS

6-1.5.1 Milestone Plan Templates



Milestone Plans track progress throughout the procurement process. As a System Administrator, you may want to maintain existing Milestone Plan templates for adaptation or develop local Milestone Plan templates.

Milestone Plan templates help users build their schedules and dependencies for specific procurement actions and then follow the accomplishment of those task during the life of the procurement. PD² can assist in tracking completion of the Milestone steps.

Each template includes a column on milestone task durations and another on predecessor steps.

Following is a general description of the features of Milestone Plan templates. For additional information see PD2 Advisor Functional (list)

6-1.5.2 Milestone Dates

Milestone Plans track three types of dates: planned, revised and actual dates. PD² contributes to the tracking of each type of date, but the inputs of the system administrator are important in calculating the dates and their sequence.

For planned dates, PD² responds to users' input of planned overall start and end dates for their procurements by populating planned start and completion dates for specific steps within the procurements. These are based on the number of days established in the template and any predecessor information that may have been defined by the system administrator for that template.

Revised dates indicate changes in the planned dates (which are fixed for tracking purposes once the Milestone Plan is saved for the first time). Once saved, altering a Milestone Plan's descriptions, start and end dates, or dependencies will result in revised schedule dates.

Finally, Actual dates are populated by individual users or automatically by PD² (if the milestone steps were active, the system will record their completion dates automatically). The actual dates reflect the realities of task completion and can be reported against planned dates.

6-1.5.3 Active Milestones

Documents and Action Types can be associated with Milestone steps for automatic tracking of their completion. For example, "PR" and "Approve" might be selected to fill a Milestone date for a step titled "Review and approve the Purchase Request." System administrators will activate Milestone steps from within the Milestone Plan templates (You will recognize active steps by the association of the document or object icon with the given step. These appear in the Milestone Plan summary window.)

Once the specified action on an Active milestone is complete, PD² automatically updates the Actual End Date of the Milestone (recall PD² also auto-fills the planned start and finish dates based on duration.). For example, if you create a Milestone Plan by highlighting a PR document, and designate a Milestone within the Plan as Active, when associated with the Document Type SF 1449, then assign an action of Award, the Milestone Plan will be updated when a SF 1449 is issued against the PR from which the Milestone Plan was created. It will automatically be marked with an End Date when the SF 1449 is released.
Active Milestones can be locked in the Milestone templates, therefore requiring completion of these actions. Bear in mind that predecessors to Active Milestones are by default required steps. This can be a limitation and is one of the few places the system enforces a given business practice. As an example, if PR Approve is an Active Milestone with a predecessor, PD² will prevent approval and release of the Purchase Request until the preceding step is accomplished (Advantages of predecessor and dependent milestones are described below.)

6-1.5.4 Dependent Milestones

Milestone steps can be configured such that one or more steps must be accomplished before the next can begin. These dependencies are defined in the Milestone Plan templates by selecting Predecessor steps from the list box in the Milestone Detail Screen for the given plan.

This functionality works as follows: if you as the system administrator set Milestone One as the predecessor to Milestone Two, you've established a dependency. The planned and revised start dates of the second Milestone will always occur after those of the first, so Milestone Two cannot be reached before Milestone One.

The advantage of defining Predecessor relationships is that PD² will accurately reflect the task in your plan with dates that run end to end. If the lines aren't established, they otherwise appear to begin on the same calendar day.

6-1.5.5 Required Milestones

System administrators can lock milestones into the templates to require task completion. These Required steps appear in red in the Milestone Summary window.

6-1.5.6 Fixed Duration Milestones

System administrators can establish Milestones with Fixed Durations in a Milestone template. Fixed Duration Milestones are automatically calculated in the system and cannot be changed in the Milestone Plan.

6-1.5.7 Required--Fixed Duration Milestones

The system administrator can also define Required — Fixed Duration Milestones in the Milestone templates. These Milestones are required and automatically calculated in PD². A user cannot change these Milestones.

6-1.5.8 Air Force Milestone Set-Up

In defining the Air Force Standard Data Configuration Milestone Plans, five blanket rules were applied:

- No Milestones were designated "Required" steps.
- All Milestones were designated "Optional" steps.
- No Milestones were designated "Active" steps.
- Each Predecessor was designated by default as the immediate preceding step.
- Durations signify total days allotted per step and may be tallied for the task's Procurement Action Lead Time (PALT) total.

The Air Force defined its Milestones at a high-level, with the understanding that sites will supplement the baseline plans as needed. In general, the Milestone Plans were kept to a minimal number of steps.

6-1.5.9 Customizing the Milestone Plan Templates

System administrators are free to customize Milestone templates, changing such characteristics as:

- The Milestone name
- The duration of the Milestone
- The Predecessor
- The Milestone dates
- The document type to which the Milestone applies

- Users must wait until after the Milestone Plan has been saved before entering revised and actual dates.

6-1.5.10 CHECKLIST TEMPLATES

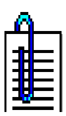
Checklist

The Checklist templates loaded into PD² are limited to a visible field length of 39 characters, meaning many of the checklist steps outlined in the AFCEP Chapter 1: SPS User Guidance, have been abbreviated in PD².

The Checklist task is a tool to track documents or events associated with a procurement action. Checklist templates can be tailored to accommodate specific situations. Each Checklist template is associated with a system module corresponding to a procurement phase:

- ❑ Contract Management
- ❑ Contract Placement
- ❑ Correspondence
- ❑ Purchase Requests
- ❑ Simplified Acquisition

6-1.6 ATTACHMENT TEMPLATES



This task relates to storing and maintaining Attachment templates. An Attachment is a 3rd party document (e.g., word-processing or spreadsheet file) imported and linked to the electronic contract file. While the Attachment template instance and its relationship to a PD² module are created in System Administration, the actual formatting and text must be created within the 3rd party software. Therefore, attachment documents are not directly accessible in PD² for reporting purposes and their information does not “carry forward” from one document to the next.

Within the Attachment task, the Templates tab includes a Classification drop-down list box. This drop-down list box contains standard EDI classifications. When developing templates and template types, be sure to select a classification to ensure proper EDI transmission of the attachment.

Additionally, the PD² attachment feature has been expanded to include automatic attachments. With automatic attachment capability, you may enter “bookmarks” into the attachment. A “bookmark” is a predefined fill-in data field within a document. The bookmark then automatically pulls data into the attachment when launched, eliminating the need for manually entering data into the attachment.

6-1.6.1 Air Force Attachment Templates

First, remember that PD^2 provides a set of automated forms whose fields are data-driven and will "carry forward" from one form to the next. Following is a list of the data-driven forms in PD^{2}v.4.2. This list will expand with future releases of the software, as new functionality is added.

PD^2 Data-Driven Forms
Purchase Request (Generic Requisition Form) and Modification
DD 254 Security Classification Specification
DD 350 Individual Contracting Action Report
DD 448 Military Interdepartmental Purchase Request
DD 1057 Monthly Summary of Contracting Actions <\$25K
DD 1155 Order for Supplies and Services
DD 1423 Contract Data Requirements List
DD 1707 Information to Offers or Quoters
DD 1594 Contract Completion Statement
DD 1597 Contract Closeout Checklist
SF 18 Request for Quotations
SF 33 Solicitation and Large Purchase
SF 1449 Commercial Solicitation, Award and Delivery Order
SF 26 Award/Contract
SF 252 Architect –Engineer Contract
SF 1442 Construction Contract Solicitation and Award
SF 1403 Pre-Award Survey Request
SF 1404 Technical Pre-Award Survey Request
SF 1405 Production Pre-Award Survey Request
SF 1406 Quality Assurance Pre-Award Survey Request
SF 1407 Financial Pre-Award Survey Request
SF 1408 Accounting Pre-Award Survey
SF 30 Amendment/Modification

6-1.6.2 Attachment Modules

PD^2 ask you to associate attachment templates with one or more Modules in the system. There are five system-defined Modules: Purchase Requests, Simplified Acquisition, Contract Placement, Contract Management and Correspondence.

These Modules serve two purposes: they allow you to group attachments by function, and they focus your menu choices when selecting attachments.

6-1.7 Approvals and Warrants

6-1.7.1 Approval Types

The Air Force has identified 11 Approval Types to use for processing certain procurement documents. The Air Force Standard Data Configuration shows these Approval Types as synonymous with the defined Approval Authorities. These Approval Types are as follows:

Approval Type	Approval Type Description
CC/DCO	Commander/Deputy/Director of Contract Operations
Clerk	Clerk
Cmte	Committee
CO(L)	Contracting Officer Limited
CO(U)	Contracting Officer Unlimited
Comp	Competition Advocate
CS	Contracts Specialist/Negotiator
FC	Flight/Division/Branch Chief
Hca	Head of Contracting Activity (HCA)
SA	System Administrator
SADBU	Small and Disadvantaged Business Utilization Specialist

(NOTE:.For further information on approval types contact your FRB POC as identified in Appendix A)

6-1.7.2 Approval Templates

In the course of a procurement action, varying levels of approval may be required depending on the thresholds, sensitivity, or other characteristics of the procurement. The Air Force Approval Templates – similar to an Approval Sheet in the hard-copy world – were designed to permit users maximum flexibility in completing the approval process.

Adding multiple authorities to a single Approval Template means each “signature” must be applied before moving to the next step in the procurement action. For this reason, the Air Force created templates which in most instances require single Approval Authorities; and then built additional add-on’s to affix when the procurement exceeds the lower-level threshold or criterion (e.g., Head of Contracting Activity).

The following table lists Air Force Approval templates and their corresponding Approval Authorities. In reviewing it, you’ll note that some duplication exists where two versions of a template were developed so users could choose the one fitting the nature of the procurement handled (e.g., Clearance [Sole Source/Competitive], which may require committee review). You will also find asterisk where the document may require an additional “hca” template.

Approval Template Name	**Approval Authorities**
Acquisition Plan*	Contracting Officer Limited
BPA Call Centralized	Contract Specialist/Negotiator
BPA Call Decentralized	Clerk
CBD Announcement	Contract Specialist/Negotiator
Certificate of Competency	Contracting Officer Limited
Clearance (Sole Source/Competitive)	Contracting Officer Limited
Clearance (Sole Source/Competitive)*	Contracting Officer Limited; Committee
D&F < or = 100K	Contracting Officer Limited
D&F > 100K*	Contracting Officer Limited
DD 1057 Report (not monthly worksheet)	Commander /Deputy/ Dir of Contract Ops
DD 1155	Contracting Officer Limited
DD 1594 Contract Completion	Contracting Officer Limited
DD 1597 Construction Close-out	Contracting Officer Limited
DD 2579	SADBU
DD 350	Contracting Officer Limited
External Award / Contract Shell	Clerk
Funds Certification	Contracting Officer Limited
HCA	HCA
J&A < or = 1M	Competition Advocate; CO Limited
J&A > 1M*	Flight/Division/Branch Chief; Competition Advocate; Contracting Officer Limited
Letter Solicitation	Contract Specialist/Negotiator
Master BPA	Contracting Officer Limited
Plant Clearance (Security)	Contracting Officer Limited
Purchase Request	Clerk
Ratification*	Contracting Officer Limited
RCS 1279 (Report to Congress)	Contracting Officer Limited
RFQ / SF18	Contract Specialist/Negotiator
RFQ Amendment	Contract Specialist/Negotiator
SF 1403 Request for Pre-Award Survey	Contracting Officer Limited

Approval Template Name	Approval Authorities
SF 1442 (Construction)	Contracting Officer Limited
SF 1444 (DoL Additional Classification/Rates)	Contracting Officer Limited
SF 1449 Award	Contracting Officer Limited
SF 1449 Delivery Order	Contracting Officer Limited
SF 1449 Purchase Order	Contracting Officer Limited
SF 1449 Solicitation	Contract Specialist/Negotiator
SF 1449 Task Order	Contracting Officer Limited
SF 252 (A/E)	Contracting Officer Limited
SF 26 Award	Contracting Officer Limited
SF 30 Amendment	Contracting Officer Limited
SF 30 Modification	Contracting Officer Limited
SF 33 Award	Contracting Officer Limited
SF 98	Contracting Officer Limited
SF 98a	Contracting Officer Limited
SF 99	Contracting Officer Limited
SF 33 Solicitation	Contracting Officer Limited
Termination*	Contracting Officer Limited

Various users may apply the appropriate "signature" exercising Approval Authority for the templates listed in the table above. Approval Authority is granted to individual users in User Set-Up.
The Flight/Branch Chief generally has Clerk, Contracting Specialist/Negotiator, CO Limited and CO Unlimited Approval Authorities. Therefore, the Flight/Branch Chief would be assigned not only Clerk approval type, but also CS, CO(L), and CO(U). These default assignments can be stripped (or more likely never assigned) in cases where the Flight/Branch Chief is not a warranted Contracting Officer.

The Contracting Officer Unlimited can sign for the CO Limited as well as the Contracting Specialist/Negotiator. The CO Limited may also sign for the Contracting Specialist/Negotiator.

Although the CC/DOC and SA have broad rights, it may be expected that only the Committee will sign for the Committee, only the SADBU for the SADBU, and only the Competition Advocate for the Competition Advocate.

These general Approval Authority rights are repeated in the table below for easier reference:

Approval Authority	Access
Commander/Deputy/Director of Contract Operations	All
System Administrator	All
Flight/Branch Chief	Clerk, Contracting Specialist/Negotiator, CO Limited, CO Unlimited, Fight/Division/Branch Chief

Contracting Officer Unlimited	Clerk, Contracting Specialist/Negotiator, CO Limited, CO Unlimited
Contracting Officer Limited	Clerk, Contracting Specialist/Negotiator, CO Limited
Competition Advocate	Competition Advocate
Contracts Specialist / Negotiator	Clerk, Contracts Specialist / Negotiator
Committee	Committee
SADBU	SADBU
Head of Contracting Activity (HCA)	hca
Clerk	Clerk

6-1.7.3 Warrants

Warrant

A warrant represents granted authority to obligate Government funds in a specified dollar range. In PD², a warrant identifies the level of authority required to release documents. However, currently a Contract Action Report (CAR) cannot be created/released if the base and exercised options exceeds CO's warrant. PD² supports the definition of warrants based on dollar value and contract type.

The Warrant Types feature in PD² provides a means for grouping similar Warrants. The Air Force defined two Warrant Types for the contracting community:

Code 10: PCO/ACO

Code 20: TCO

The TCO distinction was made to accommodate cases where a distinct termination Warrant authority is required.

The Air Force defined six Warrant thresholds for the PCO/ACO Warrant Type and one for TCO. The six PCO/ACO warrants include:

Unless otherwise noted, the following Warrant thresholds apply to the PCO/ACO Warrant Type and are provided as part of the Air Force Standard Data:

Warrants
Unlimited
< 10M
< 5M
< 1M
< 100K
< 25K
TCO Unlimited

The Warrants defined are for typical threshold levels. These are intended to provide guidelines; therefore sites can revise them as necessary to match their specific warrants and threshold levels.

While each contracting officer can have only one Warrant Type, PD² provides other parameters to control Warrant authority: Award Type and Contract Type. Therefore, Air Force sites can further tailor the baseline Warrants model to distinguish the contract types which, again, the baseline model does not do.

When determining appropriate Warrant information, sites should consider each combination of award type, contract type, and dollar value limits that may be assigned to a particular user based on the types of contracting performed at the site and warrant a user might possess. Example combinations include: GSA-FFP-Unlimited, GSA – FFP - < 100,000, or Contract – COST- < 10,000. The Air Force Standard Data provides warrants in terms of Firm Fixed Price (FFP) Contract Type only. If sites wish to supplement the Air Force Standard Data with additional warrants of varying contract types and/or dollar values, they may do so within the Warrants task of System Administration. The system defined options for these parameters are defined in the following tables:

Award Type	Description
PO	Purchase Order
DO/TO	Delivery Order/Task Order
GSA FSS	Delivery Order
Contract	Contract Purchase
BPA Master	Simplified Purchase
BPA Call	Simplified Purchase
Agreements	Agreements
Telecom	Telecommunications
FFP	Firm Fixed Price
FP-EPA	Fixed Price with Economic Price Adjustment
FP-EPA-T	FP-EPA for Telecom
FPI	Fixed Price Incentive
FPAF	Fixed Price Award Fee
FP-PPR	Fixed Price with Prospective Price Redetermination
FCP-RPD	Fixed Ceiling Price – Retroactive Price Redetermination
FFP-LOE	Firm Fixed Price – Level of Effort
COST	Cost
CPFF	Cost Plus Fixed Fee
CPIF	Cost Plus Incentive Fee
CPAF	Cost Plus Award Fee
CS	Cost Sharing
T&M	Time & Materials
LH	Labor Hours
LTR	Letter

6-1.8 Other System Administrator TasHIBB

As the system administrator, you may also have responsibilities to assist users with performing special activities. The following task may fall under system administrator responsibilities, but are not necessarily System Administration task within PD².

Workload Assignment
Vendors Maintenance
Organizational Maintenance
Numbering Maintenance and PIIN Reassignment
Multiple Contract Modification
Interface By-product Procedures
Cancel PR
Customer Requested Changes

6-1.8.1 Workload Assignment

Workload can be assigned in PD² in one of two ways: through a manual assignment from a manager to a subordinate, or via an automated assignment based on pre-defined selection criteria.

System administrators can grant users the right to assign workload to others. Users must have workload assignment authority established in the system administration task, or they will not be permitted to electronically assign work.

When assigning workload, one document within the workload must be designated the "master" document, to which an associated action triggers completion of the assignment. For example, a Purchase Request and several attachments may be contained in a folder for assignment. The Purchase Request may be designated the master document with the action "award". This indicates that when an award is released from the designated PR, the workload assignment is considered complete. Each workload assignment must be assigned one master document with an action to indicate workload completion.

6-1.8.2 Automatic Workload Assignment

PD² permits the auto-assignment of Purchase Requests based on areas of expertise established in users' procurement profiles. Users can be certified experts in one or more areas, using designators such as program, FSC or SIC codes.

Enabling automatic workload assignment will prompt PD² to search for a qualified pool of candidates for the distribution of workload. The most qualified employee with the fewest workload assigned task will receive the automated assignment.

Workload parameters can also be configured. PR's can be distributed to users with a specified percentage of the areas of expertise (e.g., FSCs or SIC codes) or certifications denoted. If PD² cannot find a user whose profile matches the auto-assignment parameters, no automated assignment will be made.

6-1.8.3 Vendors Maintenance & CCR Procedures/Functionality

Vendors and other organizations are maintained in PD² to avoid redundant entry. The vendor database can track many locations for a given vendor and many points of contact, FSCs, and

NAICs at a given location. The vendor maintenance feature allows any authorized user to add, modify, or simply view vendor records in the vendor database.

To properly maintain the vendor listing, be as specific as possible when entering codes and avoid the use of miscellaneous, catchall categories. Enter the appropriate SIC, FSC, Preference Program, RYG Status and DLA Status (as applicable) in the address detail tab of the vendor information. Periodic vendor maintenance is essential for keeping the SIC and FSC listing updated and error free and to ensure proper vendor rotation in the PD^2 Solicitation Mailing List function. To ensure proper CAR reporting, verify a vendor DUNS number is loaded for each vendor.

When adding new vendors into PD^2, the following fields must be populated:

- Vendor name
- Vendor address line 1
- Vendor city
- Vendor state (for domestic vendors) If the vendor is foreign, leave the state field blank
- Vendor country code . Vendor zip code (or postal coded for foreign vendors)
- If DUNS code is entered, it must be 9 digits – Note: DUNS must be entered for CCR Sync
- If DUNS +4 code is entered, it must be 4 numbers
- Short Code: populate the Vendor's CAGE code in the field labeled short code

To add vendor Parent Name and Parent Tax Identification Number, double click on the blank field to the right of Parent Name. This will trigger the **Vendor Parent Selection** window from which to search for and select the desired parent name.

Central Contractor Registration (CCR) and Standard Procurement System (SPS)

PD^2 contains functionality that automatically updates vendor addresses in PD^2 database with the current vendor information located in CCR. This enforces CCR as the authoritative source for vendor information

6-1.8.4 CCR and SPS Background and Functionality

Regulations pertaining to CCR usage

FAR 4.11 outline the policies and procedures on CCR.

CCR and SPS

When a contracting officer attempts to release an award, PD^2 will automatically check to see if the vendor data has been synchronized within the timeframe set by the SA (default is 30 days). This functionality ensures that each vendor is synchronized every 30 days at a minimum.

SPS will search the CCR database for the vendor using the DUNS number assigned to the vendor in the PD^2 database. The contracting officer will receive a notice that the vendor is not CCR registered, expired or inactive.

PD^2 will also compare the vendor physical address in its database with the vendor address listed in CCR. If they match, the award continues. If they do not match, the contracting officer will be notified. If one of the FAR 4.1102 exemptions applies the contracting officer can bypass the automatic synchronization process by selecting the exemption from a drop down menu and the award will continue. Otherwise, the PD^2 database information will be overwritten with the CCR information and the award will continue. The exemption options are:

- Purchase Card
- Classified
- Contingency or Emergency
- Unusual or Compelling Needs
- Foreign Vendor
- Non-EFT Micro-purchases
- Technical/Connectivity Issue (PD2 specific exemption)
- Manually synchronized (PD2 specific exemption)

The following information in PD^2 will be synchronized from CCR:

1. Dun and Bradstreet Data Universal Numbering System (DUNS)

2. DUNS + Four

3. CAGE Code

4. Legal Business Name

5. Street Address 1 (Physical Address)

6. Street Address 2 (Physical Address)

7. City (Physical Address)

8. State / Province Code (Physical Address)

9. Zip Code/Postal Code (Physical Address)

10. Country Code (Physical Address)

11. Organizational Type

12. Business Types

The rest of the vendor data in the PD^2 database, including POC information will remain the same.

6-1.8.5 Organizational Maintenance

Maintenance of Other Organizations involves updating address lists and points of contact outside the vendor listing. This might include issuing and payment offices, receiving or ship-to addresses and other procurement-related organizational information. Locations can be associated with multiple address types and contacts.

Other Organizations are available for various fill-in fields throughout PD². System administrators and others with authority to add or alter organizational data can:

Add a new organization, address, or contact

Change organization, address, or contact data

Specify an additional address (e.g., office or place of business) for an organization

Classify an organization by address type (i.e., Auditor Office)

Record additional points of contact for an organization

Delete organization information

Search for an organization

Search for a contact

Adhering to the following guidelines will ensure proper transmission and receipt of organization information with interfacing external systems. When adding a new organization to PD², the following fields must be populated as follows:

Ship to Addresses: The Ship To SRAN/DoDAAC/UIC/DoDAAN/BPN must be placed in the Activity Address Number and Local Code fields of organizations designated as Ship To addresses.

Issuing Offices: For FPDS-NG reporting, sites must enter their office ID in the Contracting Office field. Therefore, changes to your office ID should be reflected in the Contracting Office Field.

Requesting Offices: The first 6 characters of the MILSTRIP is equal to the Activity Address Number and Local Code of the Requesting Office. In order to properly populate automated PR's, that office must be listed in PD² as a Requesting Office and Ship To address or the PR will be rejected.

Payment Office: When entering a new Payment Office, place the DSSN in the Local Code field and the DoDAAC in the DoDAAC/UIC/DoDAAN field.

Department of Defense Activity Address Codes (DoDAAC) for DFAS payment Activities

DENVER CENTER & OPLOCs		**CLEVELAND CENTER & OPLOCs**	
Dayton	F03000	Pacific	N45924
Limestone	F67100	Japan	N62649
Japan	F68800	Pensacola	N68566
Europe	F78900	San Diego	N68688
		Norfolk	N68732
		Charleston	N68892
		Oakland	N68894
INDIANAPOLIS CENTER & OPLOCs		**COLUMBUS CENTER--MOCAS**	
Directorate of Network Ops (DNO)	HQ0105	NORTH ENTITLEMENTS	
Lawton	HQ0300	-Bunker Hill Division	SC1016
Orlando	HQ0301	-New Dominion Division	SC1018
Rome	HQ0302	-Minuteman Division	SC1032
Rock Island	HQ0303	SOUTH ENTITLEMENTS	HQ0338
St Louis	HQ0304	-Southeast Division (SC1020) closed	
Seaside	HQ0305	-Capitol Division (SC1034) closed	
Lexington	HQ0335	-Chesapeake Division (SC1030) closed	
San Antonio	HQ0345	WEST ENTITLEMENTS	HQ0339
Pacific	HQ0346	-Gulf coast Division (SC1024) closed	
Def Agency Financial Svs (AKB)	HQ0347	-Gateway Division (SC1028) closed	
Norfolk	HQ0348	-DPRO West Division (SC1002) closed	
		-Santa Ana Division (SC1006) closed	
		-Van Nuys Division (SC1004) closed	
EUROPE		**KANSAS CITY CENTER**	**M67443**
Kleber Kaserne	HQ0349		
Landstuhl	HQ0350		
Ramstein	HQ0351		
Vogelweh	HQ0352		

In some special cases you will need to load payment offices as follows:

- Pay Office Load for SALES type contracts (monies being received):
  Organization Name: Income
  Address: No Payment will be made by the government on this contractual instrument
  Address Type: Payment Office
  DODAAD/UIC/DODAAN: INCOME
  Local Code: INCOME

- Pay Office Load for Non-Appropriated Funds
  Organization Name: NAF
  Address: Payment will be made by Non-appropriated Funds Accounting
  Address Type: Payment Office
  DODAAD/UIC/DODAAN: NAF
  Local Code: NAF

When loading your Issuing Office ensure you load DODAAC (FAXXXX) in the DODAAD/UIC/DODAAN field in PD^2. Load the first six positions of your contract award PIIN (i.e., FA3300) into the Local Code field. Then you MUST ensure each user Utilities/Preference has this selected as the Issuing Office.

For Requesting Offices and Ship to Addresses you must load those organizations with the SRAN or DODAAC (whichever is used by your site) in both the DODAAD/UIC/DODAAN field and the Local Code field.

Notes:

Information on DODAACs, and to search for a DODAAC, go to the following web site:

https://dodaac.wpafb.af.mil/

You can query by DSSN at:
http://referencetool.dfas.mil/reftool/vpoc1030$.startup

You can query by ADSN at:
http://referencetool.dfas.mil/reftool/vpoc1040$.startup

If you make any changes to an organization, it must be re-approved in PD2.

It is important to realize when you search for an address, one of the search criteria is the Address Type. For an address to be included in a search, it must be associated with the Address Type that has been chosen for that particular search.

You may assign multiple addresses to an organization and multiple Address Types and contacts to an address.

6-1.8.6 Interface By-Product Procedures

To support successful receipt and transmission of data with interfacing logistics customers, the SA will be responsible for certain tasHIBB throughout the procurement process. Each site will have a designated PR follow-up recipient, who will occasionally receive alert messages from interfacing logistics systems. Upon receiving an alert, the PR follow-up recipient will be responsible for notifying the respective buyer and supporting associated tasHIBB as appropriate.

6-1.8.7 Cancel PR

When receiving a logistics customer requested cancellation, an alert will be sent to the PR follow-up recipient and a sticky note will be attached to the PR. Both the alert and sticky note will indicate the PR number and quantity to be cancelled. The follow-up recipient must send an alert to the PR's owner notifying him or her to route the PR to the SA for cancellation. When the PR is cancelled, the customer will automatically be notified.

When canceling PR's, interface customers (except ABSS) can only receive the following six reasons for cancellation:

Cancel **Washpost**, Any Reason

Insufficient Data Received

Item Temporarily Unavailable

Mutual Term, Customer Request

Order Not Consummated (also change Cost Constraint to No Charge on the PR)

Product Not Available

If a PR must be cancelled because of Free Issue, the buyer will leave the unit price as-is and change the cost constraint to No Charge, then route the PR to the SA for cancellation. The SA should then select Order Not Consummated from the reason for cancellation options. After canceling the PR, drag the cancelled document to the designated cabinet.

6-1.8.8 Customer Requested Changes

If a customer sends an AM(x) transaction referencing an unapproved PR, the priority and/or delivery date will be automatically updated within the PR. An alert will be sent to the PR follow-up recipient indicating the changes made. The PR follow-up recipient must then alert the PR's owner of the change.

If a customer sends an AM(x) transaction referencing an approved PR, a sticky note will appear on the PR indicating the desired change and an alert will be sent to the PR follow-up recipient. The PR follow-up recipient should then notify the buyer to take note of the change in request. If the PR is awarded or cancelled no action will occur.

If a customer system may sends a 1CU transaction to change the unit of issue for a particular stock number, the change will be automatically made to the line items on unawarded documents and to the stock number in the NSN Maintenance tab of the Auto Order task.

If a 1CU transaction is sent for an awarded PR, an alert will be sent to the PR Follow-up recipient detailing the unit of issue change. A sticky note will also appear on the PR and any subsequent solicitations and awards.

Customers requesting follow-up or expedite for a PR via an interface will generate an alert to the PR follow-up recipient and create a sticky note attached to the document. The alert and sticky note will indicate Expedite or Follow-up. The follow-up recipient must notify the PR's owner to take appropriate action after which status will be sent to the customer system regarding the referenced PR.

When a customer requests reconciliation, an alert will be sent to the PR follow-up recipient stating that a 1LH was received from that customer system. Status will be automatically sent to the customer system regarding the reconciled PR's. A reconciliation log will be created within SPS-IM. The five groups of data within the log are:

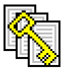
- Reconciliation Matched Listing – Lists those 1LP transactions where the stock number/purchase requisition number combinations are found in PD².
- Reconciliation Unmatched Listing – Lists those 1LP transactions where the stock number/purchase requisition number combination is not found in PD².
- Reconciliation Action Listing Contracting – Lists those 1LP transactions where the stock number/purchase requisition number combination is not found in PD² and yet the 1LP lists the combination as being awarded.
- Reconciliation Action Listing Customer – Lists PRs found in PD² where the positions 2-6 of the MILSTRIP = a SRAN in the 1LH, but for which no 1LP was received.
- Reconciliation Transaction Listing – Lists all 1LH/1LP transactions received by SPS-IM.
- Input Summary – A raw count of the number of records contained in both the 1LH and 1LP, the number of matches found (stock number/purchase requisition number combination found in PD²) and the number of records requiring no action (did not print on any listing other than the Reconciliation Transaction Listing).
- Unmatched Summary – A raw count of the number of records not found in PD² and the number of PRs found in PD² which did not have a 1LP record.\
- Output Summary – A count of how many:

  AE1 transactions generated by this run,
  LPS transactions generated by this run,
  EDD transactions generated by this run, and
  LCC transactions generated by this run.

6-1.8.9 Other PD² System Administration Options

PD² contains a variety of system administration tasHIBB that should be configured to automate or streamline the procurement process. These include: Buy American Exemptions, Class Set-Asides, Automatic Order Criteria, Procurement Analysis, Contract Type, Automatic Closeout, and Closeout.

6-1.9.1 ASF

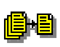


In order for PD[2] to generate and save EDA files to a shared network drive you must tell PD[2] how EDA transactions are to be processed. To do this you must modify the ASF task located in the System Administration screen. The ASF task allows the System Administrator to set options for document generation so the user may generate locally on the ASF server or the client server. See AFCEP Chapter 7 for further details.

6-1.9.2 Buy USA

Buy American Act exemptions are specified in the FAR Part 25. Sites can maintain lists of these exempted items for use in analyzing Purchase Requests. To facilitate the search and analysis, line items can be matched to exemptions using keywords.

6-1.9.3 Class Set-Asides



The Set-Aside task is used to establish and maintain the Class Set-Aside List, including the specified SIC, FSC and WSC Codes. These are also used in the analysis of the Purchase Request (PR Analysis).

6-1.9.4 Analysis

Procurement Analysis is an optional tool used to validate the completeness and accuracy of solicitations, awards, and modifications against a pre-established set of rules. Analysis can be performed on the following type of documents:

Purchase Request

RFQ (SF 18, SF 1442, SF 1449)

RFP (SF 33, SF 1442, SF 1449)

RFQ/RFP Amendment (SF 30)

Simplified Purchase Award

Delivery Order

BPA and BPA Master Agreement (DD 1155, SF 1449)

Contract Award (SF 26, SF 33, SF 252, AF 1449, SF 1442)

Contract/Purchase Order Modification (SF 30)

Once the analysis has been run, the user can make the appropriate changes to the data in the document and re-run the analyze function. This task engages PD² in a series of validations of procurement data based on pre-defined internal parameters. Analysis can be used to alert procurement specialists of “failure(s)” to meet the specified criteria, resulting from inaccurate or incomplete data on the form.

Upon initial deployment of PD², select all validation rules. In time, you may elect to reduce the number of selected validations.

The Analysis task also identifies the workload criteria to be used in the auto-assignment of Purchase Requests among users at a site. This functionality is provided on the second tab of the Analysis feature.

6-1.9.5 Contract Type

Automatic Contract Type Suggestion is a rule-based decision support module that recommends a contract type at the line item level to the user. Rules may be updated/customized in the Contract Type task. When a solicitation is generated from a PR, or a line item is “pulled” from a requirement to a solicitation document, PD² will suggest a contract type for each line item, based on other data related to the requirement. This recommendation task generates an alert if the user selects a contract type that is not consistent with certain parameters defined in system administration. However, it will not prevent further action on a document, as it is merely a suggestion. As such, the recommendation of “suggested” contract type can be overridden.

6-1.9.6 Automatic Order

The System Administration Auto Order task relates to the automatic processing of orders. When a purchase request is received, it can automatically be ordered if it falls within the defined criteria. Automatic orders may be purchased from System Administration established catalogs provided by mandated vendors or GSA schedules. They can also be ordered directly from pre-established contracts. Automatic Ordering features include:

- Establishing and maintaining a list of item numbers
- Identifying authorized users for the automatic order option
- Creating a product item list to search in the automatic order list (i.e. FPI, Ability One, and GSA/VA contracts)

Developing contracts and assigning roles within Automatic Order can be a time consuming task for system administrators who must set up the user roles and vendor catalogs before activating the task. The trade-off may be increased buyer efficiency when purchasing automatic order eligible items. Offices with high volumes of repetitive buys may consider exploring this tool. If your office does choose to activate Auto Order, you are strongly discouraged from selecting the “full-auto” setting.

In addition to GSA schedules, sites may have local IDIQ contracts to enter into PD^2 for automatic ordering. If any contracts do not fall under one of the category selections (i.e. FPI, Ability One, and GSA), do not select an item from the category drop-down list.

For the Air Force, Automatic Order will also serve as a surrogate item file. When a PR enters PD^2 from ABSS, various information from the PR, such as CLIN, NSNs, and descriptions, will also populate the Auto Order task.

With the support of the Adapter, the NSN collection posts stock numbers and descriptive information to the NSN tab of the Auto Ordering task, including both visible and non-visible elements. Stock numbers (NSN) will populate PD^2 in the following format: XXXX-XX-XXX-XXXXXX (stock numbers may range from 7-15 characters). Do not change the stock number or format received within the Auto Order Task or within the PR itself. Upon return to the customer, NSN information will arrive in the customer generated format.

If item descriptions arrive with misspellings or erroneous information, delete the record from the Auto Order Task and have the buyer contact the customer for re-submittal of the 1IL (to populate the NSN table of PD^2). The buyer should keep the original PR and manually fix the item description misspellings. Do not change the NSN number itself (Line Item Description tab), but only the associated description on the Line Item Detail tab.

Changing the data via the NSN Maintenance tab of the Auto Order Task will not affect the stock numbers/descriptions for existing line items. Changes will only affect future requisitioned Line Items. If necessary, from the Auto Order Task, you may change or add a new:

NSN (XXXX-XX-XXX-XXXXXX with 7-15 characters)

Unit of Issue

Short Description

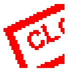
In order to change elements not visible from the Auto Order task, such as the extended description, variation in quantity, and brand name/sole source, delete the NSN record from the NSN Maintenance Tab and re-load the modified information via a 1IL transaction (via a customer interface or internet-based 1IL capability). This action will affect all subsequent incoming PR's.

6-1.9.7 Auto Closeout

Auto Closeout

An Auto Closeout task has been added to the System Administration module. The authorized user has the capability to automatically closeout awards consistent with the criteria set forth in the Closeout task in system administration. System Administrators can perform the auto closeout action on awards for a single user, a team, or all users in the system.

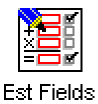
6-1.9.8 Closeout



The Closeout process identifies classes of contracts that PD² will close out without user intervention. The System Administration function includes system-defined criteria, but also provides the option to add customized criteria items for automatic closeout. This allows you to identify specific contract types for automatic closeout as well as the action to initiate it. All contract types must be the same to be considered for automatic closeout. The task itself contains two tabs: Automatic Closeout Criteria and Contract Retention Data.

Air Force sites should utilize Automatic Closeout for SAP actions only. Upon initial site deployment, deselect all system-defined conditions for automatic closeout that may accidentally lead to automatic closeout of a formal contract.

6-1.9.9 Estimating Fields



The Estimating Fields task supports the creation of Proposal Cycle Documents (PCDs) and Pre- and Post Negotiation Positions (PNPs). The Estimating Fields task allows for the creation of customized templates that store field definitions and calculations that populate the summary level cost estimating fields within a PCD or PNP. During the creation of templates, the System Administrator designates which fields are Currency, Number, Product, or Sum. In addition to creating estimating templates, the System Administrator is able to update existing templates, copy templates, copy fields within a template, and make existing templates inactive. The Proposal Cycle Documents are: Government Estimate, Contractor Proposal, Audit, Technical Analysis Report (TAR), Government Objective, and Government Negotiation. PCDs built in a series—tracking the same negotiation—must use the same template. The System Administrator enters negotiation conditions for PNPs by clicking the [Edit PNP Conditions] button and entering appropriate data in accordance with local business rules.

6-1.9.10 Funding Information

A list of available funding strips, job order numbers, and currency conversions can be loaded in to PD² to include those normally used by the site. This information should be gathered as necessary.

The Funds task is a collection of available lines of accounting for assignment by procurement users in PD². Funds can be added to documents on an individual basis, but they are not made available for distribution and access across the site until they're approved by a system administrator or qualified user. Local lines of accounting are tracked by the User ID and the Funding Strip.

Because the system does not validate funding codes, users must exercise care in loading these codes into PD².
Adhering to the following guidelines will ensure proper transmission and receipt of funding information with interfacing external systems:

Long Lines of Accounting will populate the customer-generated PR as well as the Fund task of Sys Admin.

When entering new funding information in PD^2 for revolving stock purchases, enter a SRAN/DODAAC in the Associated UIC field, Fund Code, and Long Line of Accounting. It is important to relate a SRAN/DODAAC to the Long Line of Accounting. If such a relationship is not entered, the Fund Code will not populate in the IAPS interface.

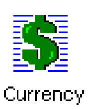
When entering funding information in PD^2 for ABSS requisitions, enter a Fund code and Long Line of Accounting, but NOT an Associated UIC. This is a mandatory requirement.

DFAS maintains a list of fund codes at www.dfas.mil (contract/vendor pay)

The system administration Funds task has been revised to allow the authorized user to establish a site-level default based on one of the five standard layouts (Army, Navy, Air Force, Marine Corps, and Defense Agencies), or the miscellaneous 109 alphanumeric character layout.

The System Administrator has the capability to search for, copy, delete, and edit existing lines of accounting in the system. The search feature allows the System Administrator to perform type-ahead, wildcard "%," and global searches at the system level. The global search feature allows the System Administrator to perform searches across the common data elements of all formats.

6-1.9.11 Currency



The Currency Conversion task allows you to enter the currency symbol, description, exchange rate versus the US dollar, and the effective date for this conversion data.

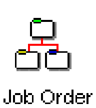
PD^2 supports one foreign currency per contract, with conversion rates defined through System Administration. Continue to use your current policy to periodically update currency conversion rates.

Adhering to the following guidelines will ensure proper transmission and receipt of funding information with interfacing external systems:

Do not enter an exchange rate with a value of "0" in the Currency Task.

ABSS has a listing of currencies and codes. If you add or change a currency symbol or unit of issue in PD^2, you must also modify the corresponding domain map in CDR-A.

6-1.9.12 Job Order



Job Order Maintenance allows you to track funding to a specific job/task level. If you are an authorized user, the System Administration module allows you to create, maintain, modify and delete Job Order Numbers. As with funding codes, system administrators can clear User ID's from created Job Orders to permit general site access to the Order number.

6-1.9.13 NSN Maintenance

Records in the NSN Maintenance task are used to assist the user in completing the Line Item Detail window and in the Auto Ordering task within PD². When the user clicHIBB the [Search] button in the Line Item Detail window, a National Stock Number (NSN) Search window opens. This allows the user to search the NSN database and select an NSN and its related information. The NSN information from the selected record then populates the following fields in the line item: NSN, Description, Extended Description, Unit of Issue, Brand Name/Sole Source (BN/SS), Variation in Quantity Above, and Variation in Quantity Below. When the user creates procurement documents using the Automatic Ordering function, if the seven NSN data fields are entered in the database, they automatically populate the line item in the procurement document.

6-1.9.14 PALT

Workload Management provides a Procurement Action Lead Time (PALT) code list containing information from the PALT table of standard lead times set up by the System Administrator.

PALT (Procurement Action Lead Time) allows authorized users to assign the duration of an activity. It identifies the expected processing time for a procurement action from time of assignment through award. The PALT task allows authorized end users to designate the standard number of days (as well as a description) required to typically complete a procurement action. PALT can be either fixed or calculated. Workload assignment will incorporate both fixed and calculated PALT. The suggested PALT is calculated from previous awards in the database of similar document type, time frame, and FSC codes. Management may keep the suggested PALT, manually enter a PALT, or select PALT from a pre-existing fixed PALT from a drop-down menu.

The calculated PALT feature is not intended to replace the Air Force Standard.

The following list describes the System Administration options available under the PALT task. Note those task labeled as required, recommended, and optional for initiating calculated PALT:

PALT NUMBERS – Used as a code to identify a specific PALT

DESCRIPTION – Title used to identify a PALT

LEAD TIME – Indicates how long it should take to complete procurement actions

DOCUMENT (OBJECT) TYPE – Required PALT calculation input. Associates a document type for each procurement object type

TIME FRAME – Required PALT calculation input. Expressed in days, weeks, months, or years, it is used to establish a date range from which objects are selected for use in calculation of PALT

FSC – Optional PALT calculation input. Includes items identified in the PR which can be used as a search criteria item

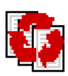
ACTION TYPE – Optional PALT calculation input. Includes items identified in the PR which can be used as a search criteria item

COST RANGE PERCENTAGE – Recommended PALT calculation input. Lists a percentage above and below the selected document

PALT dates are effectively the sum of the related Milestone durations, tracked in calendar days.

PD^2 begins PALT when workload is assigned, and restarts PALT upon reassignment. As such, it is a useful tool for determining how long a particular buyer has been working a particular action. To determine the total PALT from when a PR arrived to when the award was made, you may need to use a Cognos report. This report could also provide information on Total Acquisition Lead Time (TALT) from PR receipt to actual receipt of the item ordered.

6-1.9.15 PIIN Maintenance

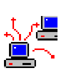


PIIN Maint

This allows the System Administrator to associate particular Serial and Call/Order ranges with a selected DoDAAN within the DoDAAN Maintenance tab. The associated serial range can be applied to all solicitations, contracts, agreements, GSA schedules orders, or orders against basic agreements. The System Administrator is also able to create and associate Call/Order ranges that can be applied to all delivery orders, BPA calls, orders against a BOA, or MARAV agreement. If a Serial or Call/Order range is not specified for a DoDAAN, the system suggests the serial numbers in sequential order.

This allows the System Administrator to assign multiple DoDAANs to the user through the Procurement Profile task. The System Administrator retains the ability to specify a default DoDAAN for the user. In addition, the System Administrator has the ability to add or edit new DoDAANs through the enhanced Procurement Profile task.

6-1.9.16 Routing

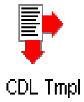


Route

Routing allows users to send documents or containers to one or more users in a pre-defined order. Documents are forwarded based on the Route template selected or the definition of a unique routing list.

No default routing templates are included in the Air Force Standard Data Configuration, as these are user dependent. Each site must identify relevant Route templates.
Note – You cannot route more than fifty objects in one routing

6-1.9.17 CDL Template



The Contract Distribution List (CDL) indicates the routing sheet for a given procurement document. CDLs are grouped by “modules” for availability at different stages in the procurement life cycle. (This limits the field of selections by relevance and for ease of use.)

CDL modules include:

Contract Management

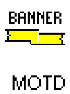
Contract Placement

Correspondence

Purchase Requests

Simplified Acquisition

6-1.9.18 MOTD



The Message of the Day (MOTD) Banner appears when users activate PD². This pop-up window displays a text message and can be manipulated by the system administrator as desired to communicate information to the user community.

6-1.9.19 License

The License task identifies the license number associated with the PD² software loaded on the workstation.

6-1.9.20 Reactivate

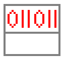
The Reactivate task can be used by system administrators to access previously closed out contracts. This provides some flexibility in the system to address unique circumstances, particularly in cases where automatic closeout criteria have been enabled. To reactivate a closed contract:

- Choose the Reactivate task in System Administration
- Highlight the contract you want to reactivate and select the Reactivate button. The contracts listed in the Reactivate task are not sorted by contract number.

You cannot reactivate the DD 1594 and DD 1597 associated with the closed out contract. You must recreate the forms when you closeout the contract the second time.

Reactivated contracts can be modified like active awards.

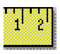
6-1.9.21 System Tables



System Tables

System Tables task has been added to PD² allowing the System Administrator to maintain large lists of data used throughout PD². These tables contain codes that are identified and maintained by the System Administrator who can add, update, activate, and make inactive codes for each type of procurement document.

6-1.9.22 Unit of Issue

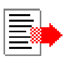


Unit of Issue

Unit of Issue (UOI) defines the types of units in which an item can be measured or purchased. The UOI codes are directly related to ANSI X12 EDI recognized standards codes. The existing UOI codes are not be supplemented, changed or deleted.

6-1.9.23 Transmit section omitted (not used)

6-1.9.24 Local Information



Local Info

Local Information is a task available for establishing additional data elements. There are 10 at the contract level and 10 at the line item level. CDR-A has currently reserved three CLIN level fields for support of interfaces with external systems. . Sites should not update any local info fields without consulting with their FRB POC

6-1.10 MAINTENANCE OF FAR/DFARS CLAUSES

When notified of a Federal Register update to the FAR or DFARS, CACI analyzes the changes and uses the Clauses module in the PD² System Administration module to update the designated clauses in the database. The clause accuracy is important, as it comprises the bulk of procurement. As changes occur in the FAR/DFARS, updates will be provided to the SPS PMO within 14 days. Sites may be notified by CACI that the installer is available for download. However, HIBB will first test all downloads before notifying USAF sites to proceed. As such, wait for specific authorization from HIBB before proceeding with an update.

In some cases, the effective date of a new clause may be immediate, and require special attention. Air Force procedures will be developed on a case by case basis to address these rare occasions when an immediate clause update might be in order. Follow the procedures in the Table in section 6-2.3.

Changes to the clause database can happen several ways. Clauses may be:

- Added
- Amended (sometimes called Revised)
- Reserved

- Added & Reserved

When the clause is added, the new clause is analyzed to determine whether it should be designated as a “fill-in” or “substantially the same as” clause. The clause is added to the database by adding the clause number, regulatory source, title, effective date, fill-in and/or substantially the same as designation. The actual text of the clause is then added. If the clause is a fill-in, all appropriate fill-in locations are designated by red text.

When a clause is amended, CACI analyzes the changes to the clause to determine the data that needs to be changed. The changed clause is modified in the database by changing the title, effective date, fill-in and/or substantially the same as designation, and prescriptive language as appropriate, as well as the actual edits to the text of the clause. Again, any new fill-in text is formatted in red.

When a clause is reserved, the appropriate clause(s) are marked and dated as reserved (unavailable for future contract action) as shown in the Clauses module as “Reserved”. They are not, however, actually deleted from the database, as any documents created prior to the deletion will still need to reference them.

When a clause is added and reserved, the new clause is added to the database by identifying the number, entering the date as the first day of the current month, and entering the clause title as “Added and Reserved”. This clause number is included in the list of clauses to be marked as reference by the administrator as described above.

When all changes to the database are completed, the database changes, along with an installation program, are posted on the CACI SPS web-site for download by the sites. Periodically, the changes to the regulations are so minor that the effort required to develop the installation program far exceeds that required to make the changes manually. In these cases, when both CACI and the SPS PMO agree, CACI will simply provide the new text on the CACI SPS web-site in an electronic format, and the changes will be inserted manually by the SPS system administrator using the Clause Edit System Administration feature. On receipt of the notification of a pending update, Air Force system administrators will connect to the following web address using a standard web browser: http://kb.caci.com/

Once connected to this page, follow the steps below:

Select the "downloads" button.

All downloads require a user id and password. If you have not already registered with the web-site, please select the "Register" button; otherwise simply select "Download Now!” If you select the "Register" button you will be asked to fill in some basic registration information (name, site, etc.). This screen will allow you to create your own user id and password for future use. Once registration is complete, you can return to the previous page and select "Download Now!”

From the Downloads page, select the "Clause Updates" button. Within this page you will see the current, and all previous, clause updates. A recent update, for example, was provided with the agreement of the PMO, consisting of ".“01" ”a Text® package) files for the FAR and DFARS, and a series of Word Documents with instructions for updating the clause database.

Notify users upon completion of the clause download, by pressing the Notify Users button within the Clause task of System Administration. As this will notify only those users who have unreleased solicitations with affected clauses, you may also elect to notify all users (when applicable) via an alert or Message of the Day banner. There may be isolated cases of a requirement to put a new clause in all existing contracts, including those already released. If this should occur, send an alert to all users notifying them of the clause change and requirement to refresh clauses, amend released solicitations, and/or modify released awards affected by the clause change.

6-1.11 PD2 SUPPORT

Sites should be able to resolve most issues locally using local policies, knowledge base (CACI KB), SPS Knowledge Base and MAJCOM Guidance. However, when issues require additional support, Air Force SPS users and system administrators should follow a local/Command basic problem resolution format, seeking assistance in the following order: