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FROM THE AMERICAN PEOPLE

Global Acquisition &
Assistance System

GLAAS 102: Buying

U.S. Agency for International Development
1300 Pennsylvania Avenue, NW
Washington, DC 20523
www.usaid.gov

Welcome!

The Global Acquisition and Assistance System (GLAAS) Team is pleased to present you with training on USAID's web-based acquisition and assistance (A&A) system, as part of our USAID/Washington Deployment. Following training, you should be able to effectively perform your A&A actions in GLAAS, and understand USAID A&A business processes relevant to your role.

Given the priority of this new system and its impact on Agency work, Agency management has asked for your full cooperation and support in implementing GLAAS. To help achieve this, it is important that each of you attend GLAAS training, as scheduled. Failure to do so may result in denial of GLAAS access until your training requirement is adequately fulfilled.

To further maximize the effectiveness of your training experience, we encourage you to actively participate in your classroom instruction by asking about the system and the business process changes it brings. After all, the success of GLAAS depends upon you!

Thank you in advance for your cooperation and enjoy your training!

Moncel Petitto
GLAAS Training Lead

Terry Payne
GLAAS Deployment Lead

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GLAAS 102:

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GLAAS
GLobal Acquisition & Assistance System
The New Era in USAID Acquisition & Assistance

GLAAS 102: Buying

November 2009

GLAAS Course Objectives

- Give USAID personnel the knowledge needed to effectively perform acquisition and assistance (A&A) actions in GLAAS
- Explain how GLAAS fits into the USAID A&A business process for all users
- Address questions about the system and business processes

What is GLAAS?
(GLobal Acquisition and Assistance System)

- World-wide, web-based procurement system for acquisition and assistance actions
- Supports acquisition and assistance functions, such as:
  - Procurement Planning
  - Milestone Planning
  - Requisitioning
  - Soliciting and Evaluating
  - Creating Acquisition and Assistance Awards
  - Interagency Agreements
  - Making Modifications and Amendments
  - Reporting
- Replacement for the MAARD, ProDoc and NMS/A&A for acquisition and assistance actions

The GLAAS A&A Process

1. **Procurement Planning**
   Plan acquisitions and assistance awards for a fiscal year, program or project.
2. **Requisition**
   Create a requisition and commit funds in Phoenix.
3. **Solicitation and Funding Opportunity**
   Issue a solicitation or funding opportunity to request proposals/applications and select a successful offeror.
4. **Award**
   Create an award and obligate the funds in Phoenix.
5. **Award Administration**
   Monitor, modify, incrementally fund and de-obligate awards.

Buying Process

1. **Solicitation and Funding Opportunity**
   - Create a Solicitation or Funding Opportunity
2. **Award**
   - Create an Award
   - Route for approval
   - Obligate the funds in Phoenix
3. **Award Administration**
   - Create Modifications to:
     - Add funding
     - De-obligate
     - Administrative modification
     - Close out

Transactions Not Handled in GLAAS

- Leases
- Bilateral obligations
- Miscellaneous Obligating Documents (MOD)
- Master Funding Documents (MFD)
- TAs as obligating documents (Airline Tickets, UAB/HHE, etc.)
- US Direct Hire Benefits and Allowances (Education Allowances, SMA, FSTA, TQSA, Emergency Travel, SF 1190 Grants, and DS 3067)

What You Will Find in This Manual

- Table of Contents
- Topic Lessons
  - Lessons containing purpose and objectives and detailed user guides for each topic
  - Hands-on walkthroughs to step through each topic
  - Independent exercises
  - Supplementary user guides, such as how to add attachments and supporting documents

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GLAAS:
Log In and Welcome Page

November 2009

Logging Into GLAAS

GLAAS is a single worldwide system. All of USAID will log into the same website.

Production Site

https://glaas.usaid.gov/

You must be logged into the USAID network to log into GLAAS.

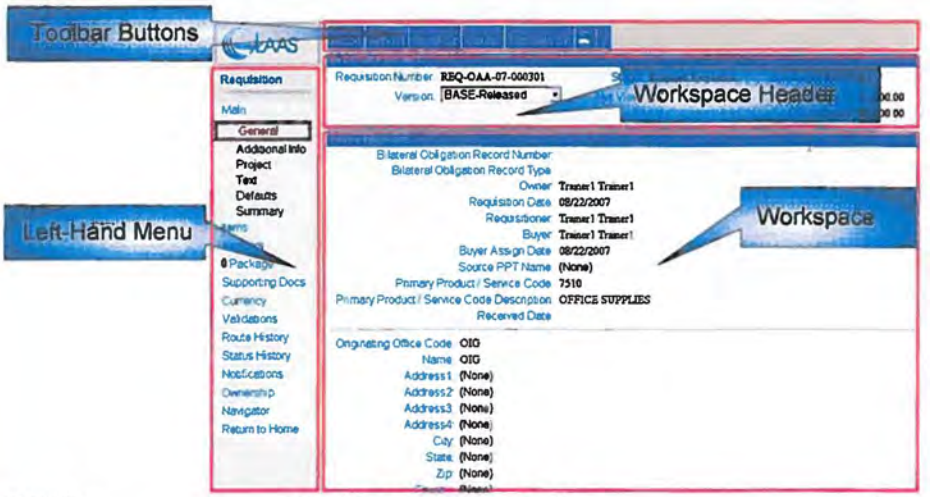
GLAAS Passwords

- You may have to use as many as two passwords in GLAAS depending on your role
  - Network Password used for:
    - GLAAS Login
    - GLAAS Approval
  - Phoenix Password

Logging Into GLAAS

GLAAS Welcome Page

GLAAS Document Screen Layout



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GLAAS 102: Buyer Assignment / Reassignment

November 2009

Buyer Assignment/Reassignment Objectives

- At the end of this topic, you will know:
  - Who is a Buyer in GLAAS
  - How to assign or reassign a Buyer to a Requisition

Who is a GLAAS Buyer?

- At USAID, the Buyer can be an A&A Specialist, a Contracting/Agreement Officer, an EXO or a Purchase Card Holder
- The Buyer is responsible for creating Awards or Orders from a Requisition

Assigning a Buyer/A&A Specialist

1. Program Managers assign the Supervisory Contracting/Agreement Officer or EXO as the Buyer during the Requisition approval process
2. The Supervisory CO/AO will then reassign the requisition to a different Buyer for processing
3. Once a Buyer is assigned to a requisition, the requisition appears in the Buyer Workload folder, located in the Buyer's Inbox

GLAAS 102 USER GUIDE:

ASSIGNING/REASSIGNING A BUYER

PURPOSE:

This user guide will show you how to assign or reassign the Buyer on a GLAAS Requisition. "Buyer" is a GLAAS term that refers to the person responsible for creating an Award or Order from a Requisition. At USAID, the Buyer can be an A&A Specialist, a Contracting Officer/Agreement Officer, an EXO, or a Purchase Card Holder.

The Program Manager will assign the Supervisory Contracting/Agreement Officer or EXO as the Buyer on Requisitions during the approval process. When a Program Manager assigns a Buyer to a Requisition, the Requisition will appear in the assignee's Buyer Workload folder within the GLAAS Inbox.

Reassignments can be performed as often as necessary. Only Contracting/Agreement Officers can reassign Buyers. The Supervisory Contracting/Agreement Officer should reassign the appropriate Buyer on the Requisition.

BEFORE STARTING:

1. You must have an approved requisition in GLAAS.
2. In order to reassign a Buyer, you must be a Contracting/Agreement Officer.

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Utilities** link under **System** on the **Access Panel**.	

Figure 2: System Utilities Screen

Steps	Section	User Action	Guidance
3.	System Utilities	Click the **Buyer** link on the left-hand menu.	

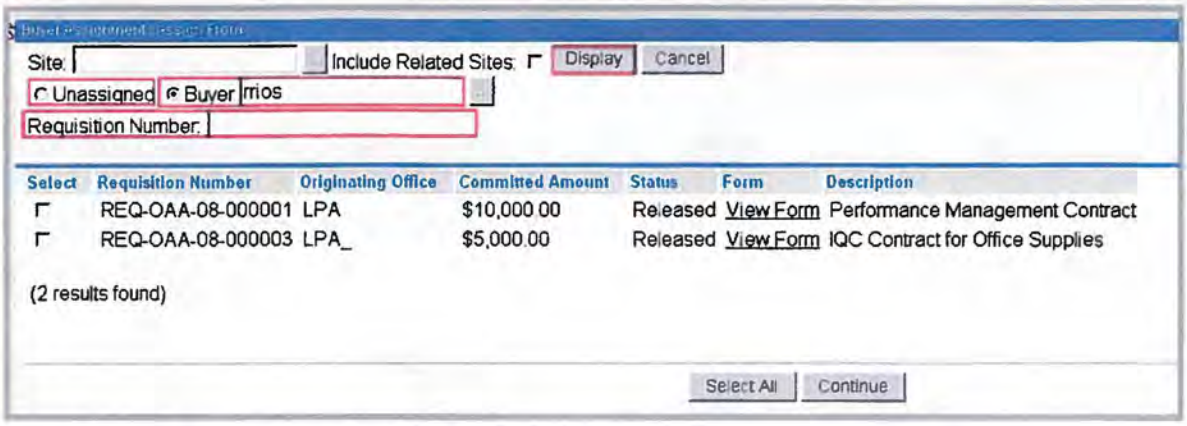

Figure 3: Buyer Assignment: Assign From Screen

Steps	Section	User Action	Guidance
4.	Buyer Assignment: Assign From	If you know the currently assigned Buyer, you can search for a Requisition based on the current **Buyer**. If the requisition does not have an assigned buyer, you can choose to display all **Unassigned** Requisitions. If you know the **Requisition Number**, enter it in the appropriate field.	When searching, you can use the percent sign (**%**) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
5.	Buyer Assignment: Assign From	Click the **Display** button to show a list of Requisitions that meet your search criteria.	

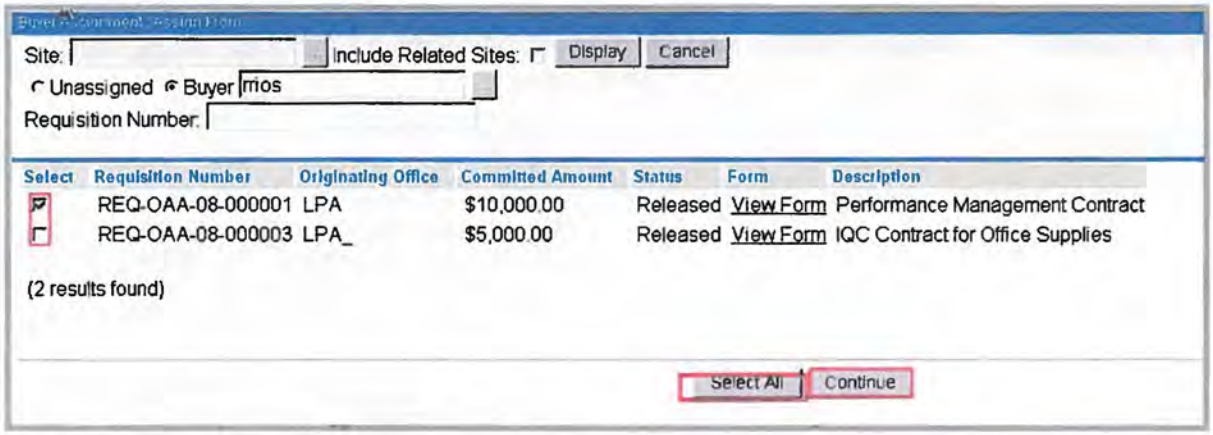

Figure 4: Buyer Assignment: Assign From Screen

Steps	Section	User Action	Guidance
6.	Buyer Assignment: Assign From	Click the **Select All** button if you want to assign the same buyer to all the requisitions in the queue. OR Click individual checkboxes to select requisitions you wish to assign to the Buyer.	GLAAS allows you to reassign the Buyer to multiple Requisitions at a time or to one Requisition at a time. The **View Form** link allows you to see the Requisition form.
7.	Buyer Assignment: Assign From	After you select a requisition, click the **Continue** button.	

Figure 5: Buyer Assignment: Assign To Screen

Steps	Section	User Action	Guidance
8.	Buyer Assignment: Assign To	Click the lookup button ( ) for the **New Buyer** field to select the new Buyer's user ID (not shown). Enter notes regarding the reassignment in the **Buyer Notes** field. Click the **Assign** button to assign the requisition to the buyer.	If you check the **Create Milestone Plan** checkbox, GLAAS will reassign the Buyer and then take you directly to the screen used to create a Milestone Plan.

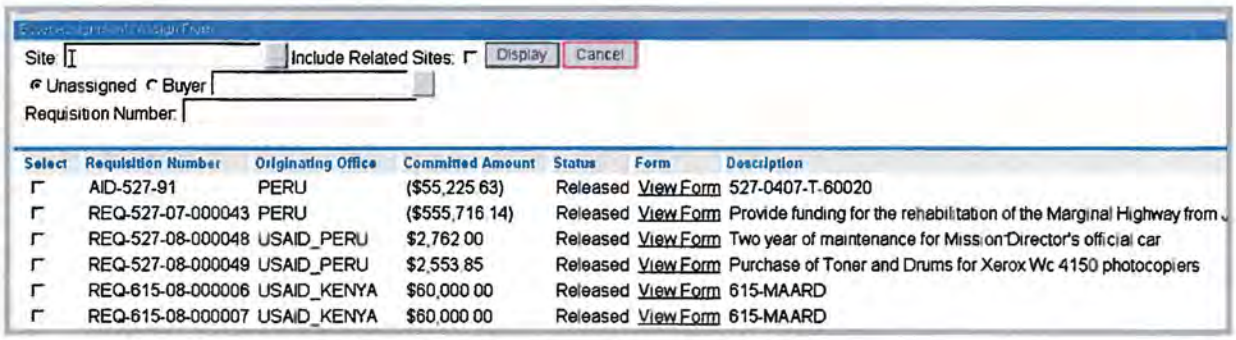

Figure 6: Buyer Assignment: Assign From Screen

Steps	Section	User Action	Guidance
9.	Buyer Assignment: Assign From	To assign a different Buyer to another requisition, repeat **Steps 4-8**. If you are finished assigning Buyers, click the **Cancel** button.	After you have assigned a Buyer to the requisition(s), GLAAS returns you to the screen where you can repeat the Buyer Assignment process in the steps above.

Figure 7: System Utilities Screen

Steps	Section	User Action	Guidance
10.	System Utilities	Click the **Return to Home** link on the left-hand menu.	GLAAS returns you to the **System Utilities** screen. The Buyer assignment task is complete.

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GLAAS 102: Creating a Milestone Plan

November 2009

Creating a Milestone Plan Objectives

- At the end of this topic, you will know how to:
  - Create a Milestone Plan
  - Link a Requisition to a Milestone Plan
  - Set the baseline of the Milestone Plan
  - Update the Actual Dates Milestone Steps were completed

GLAAS Milestone Plans

- Milestone Plans are used to track key dates for individual A&A actions
- Each task has a *PALT (Procurement Action Lead Time)* – the number of days this task should take to complete
- The A&A Specialist uses the Milestone Plan to track planned and actual dates and can report on the differences

Milestone Plan

Task	PALT
•Requisition released	1
•Buyer assigned	1
•Accept request	1
•Solicitation Creation Date	1
•Create letter RFP/SoW	2
•Obtain Reviews	3
•Issue letter of request	1
•Receive proposals	10
...	
...	

GLAAS 102 USER GUIDE:

CREATING A MILESTONE PLAN

PURPOSE:

This user guide will show you how to create a Milestone Plan in GLAAS, link it to a Requisition, and set the Baseline, which starts the time tracking for your Milestone Plan. The Milestone Plan must be created from a Milestone Plan Template. You can select the appropriate template that corresponds to the identified action type on the APP/Requisition.

BEFORE STARTING:

1. In order to create a Milestone Plan you must be an A&A specialist or a Contracting/Agreement Officer.
2. You should have a Requisition ready and open in GLAAS.
3. Before starting, the Supervisory Contracting/Agreement Officer must assign the appropriate Buyer.

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

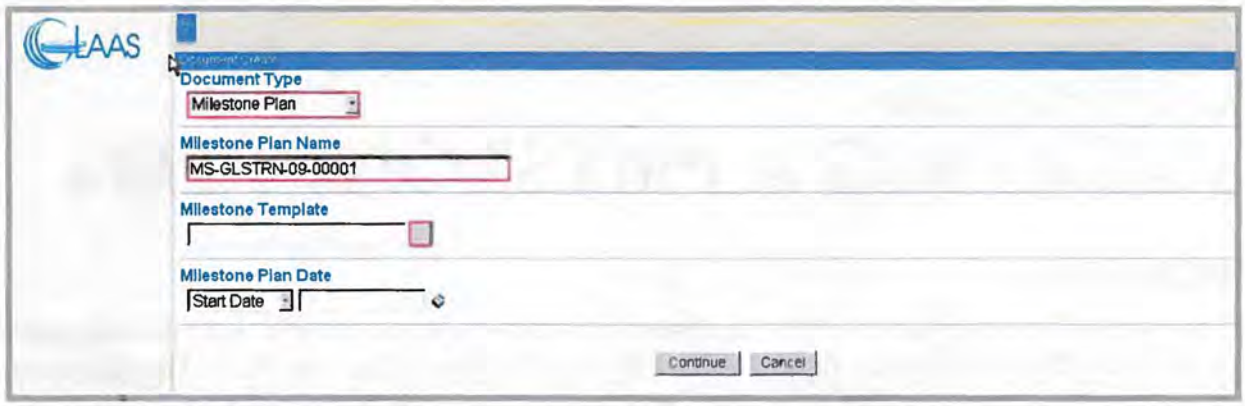


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Milestone Plan." • **Milestone Plan Name:** Enter a name for your Milestone Plan, based on the OAA-required naming scheme (see guidance). • **Milestone Template:** Click the lookup button ( ) to look for a standard Milestone Template.	The **Milestone Plan Name** field is a free-form field, allowing any text to be entered. However, OAA requires that you use the following naming scheme for Milestone Plans: MS-SITE-FY-Free-Form Description. You can have a maximum of 30 characters in the name. Select the template based on the action type identified in the Requisition.

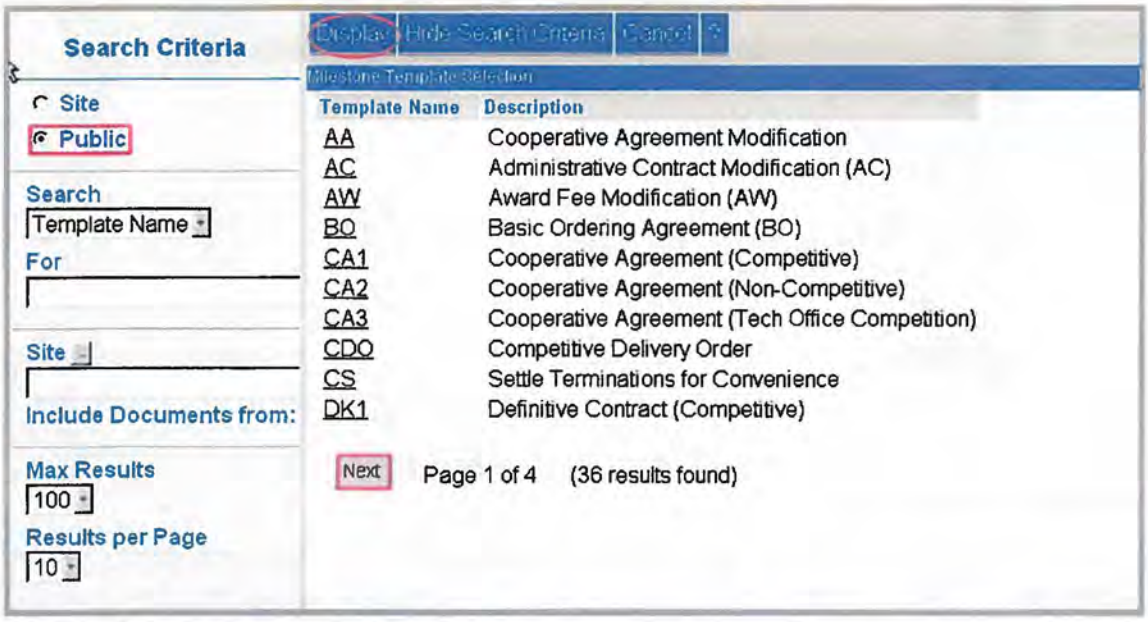


Figure 3: Milestone Template Selection Screen

Steps	Section	User Action	Guidance
4.	Milestone Template Selection	The system defaults to **Site** but you will need to select **Public** in order to find the general templates. Click the **Display** toolbar button to display a list of templates. Click the **Next** button to toggle to the next screen. Select a **Template Name** link.	When searching, you can use the percent sign (**%**) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.

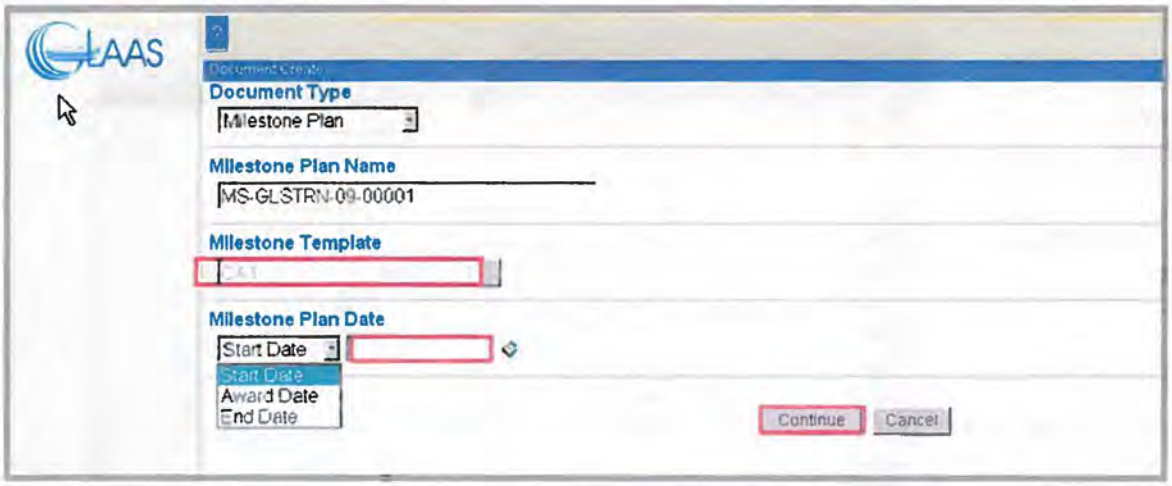


Figure 4: Document Create Screen

Steps	Section	User Action	Guidance
5.	Document Create Screen	The Milestone Template name appears in the **Milestone Template** field. Select the **Milestone Plan Date** you want to use to anchor this milestone plan and then enter the anticipated Date in the second part of the field. Click the **Continue** button to proceed.	The Milestone Planning Dates are calculated based upon the **Milestone Plan Date** selected here and the **Procurement Action Lead Times** (PALT) for each step. • "Start Date" – The projected dates for each step are calculated from the date you plan to start the Milestone Plan. • "Award Date" – The projected dates for each step are calculated from the date you plan to issue the award. • "End Date" – The projected dates for each step are calculated from the final step of the Milestone Plan. Click the calendar button ( ) to select a date or simply enter a date in the following format: MM/DD/YYYY.

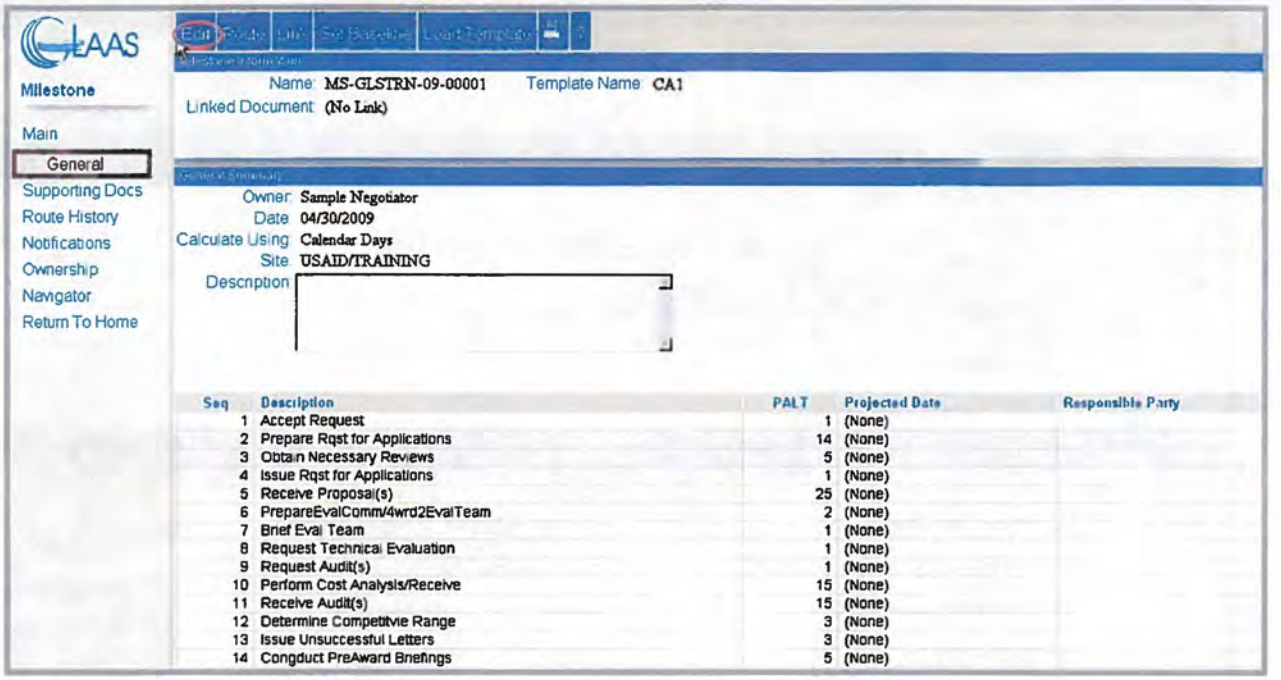


Figure 5: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Click the **Edit** toolbar button to make changes to the Milestone Plan.	GLAAS pulls the details from the Milestone Plan Template into the new Milestone Plan.

Milestone Information

Name: MS-GLSTRN-09-00001 Template Name: CA1

Linked Document: (No Link)

Milestone Detail ABC

Name: MS-GLSTRN-09-00001

Date: 04/30/2009 Start Date Award Date End Date

Calculate Using: Working Days Calendar Days

Description: MCC Program for independent media strengthening.

Milestone Steps

Select	Seq	Sub Step	Description	PALT
	1	Accept Request	Accept Request	1
	2	Prepare Rqst for Applications	Prepare Rqst for Applications	14
	3	Obtain Necessary Reviews	Obtain Necessary Reviews	5
	4	Issue Rqst for Applications	Issue Rqst for Applications	1
	5	Receive Proposal(s)	Receive Proposal(s)	25
	6	PrepareEvalComm/4wrd2EvalTeam	PrepareEvalComm/4wrd2EvalTeam	2
	7	Brief Eval Team	Brief Eval Team	1
	8	Request Technical Evaluation	Request Technical Evaluation	1

Figure 6: Milestone Detail Screen

Steps	Section	User Action	Guidance
7.	Milestone Detail	You can enter a new **Date** and new **Date Type**, if you wish. Select **Working Days** or **Calendar Days** Enter a **Description** of the Milestone Plan.	The Milestone Information screen lets you change the details of this Milestone Plan. **Working Days -** GLAAS will calculate Milestone dates using a calendar of US Federal working days. It will not include Saturdays, Sundays or US Federal holidays as working days. **Calendar Days –** GLAAS will calculate Milestone Dates using regular calendar days, including Saturdays and Sundays, and US Federal holidays. Some **PALT** fields can be edited, depending upon the Milestone Template chosen.

Milestone Steps

Select	Seq	Sub Step	Description	PALT	Projected Date
◉	1	Accept Request	Accept Request	1	
○	2	Prepare Rqst for Applications	Prepare Rqst for Applications	14	
○	3	Obtain Necessary Reviews	Obtain Necessary Reviews	5	
○	4	Issue Rqst for Applications	Issue Rqst for Applications	1	
○	5	Receive Proposal(s)	Receive Proposal(s)	25	
○	6	PrepareEvalComm/4wrd2EvalTeam	PrepareEvalComm/4wrd2EvalTeam	2	
○	7	Brief Eval Team	Brief Eval Team	1	
○	8	Request Technical Evaluation	Request Technical Evaluation	1	

Figure 7: Milestone Steps Screen

Steps	Section	User Action	Guidance
8.	Milestone Steps	Click the buttons on the **Milestone Steps** toolbar to modify the Milestone Plan. Click the **Delete** toolbar button ( ) to delete a selected step. Click the **Up** and **Down** toolbar buttons ( ) to move a step up or down on the sequence. There are two ways to add a step: • Click the **Add** toolbar button ( ) to add a step at the end of the displayed list. OR • Click the **Insert** toolbar button ( ) to add a step above the current selected step.	You can modify the Milestone steps or add additional steps if needed. Many of the steps in the Milestone Plan Templates are mandatory. If you try to remove them from your Milestone Plan, you will receive an error message informing you that you cannot delete the step.

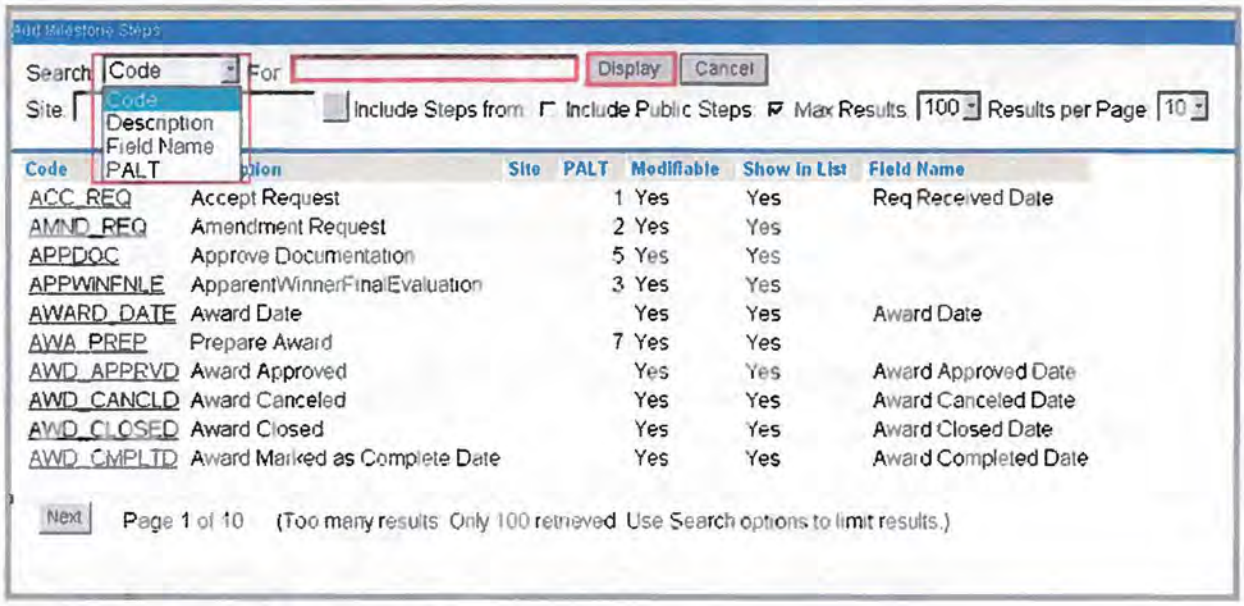
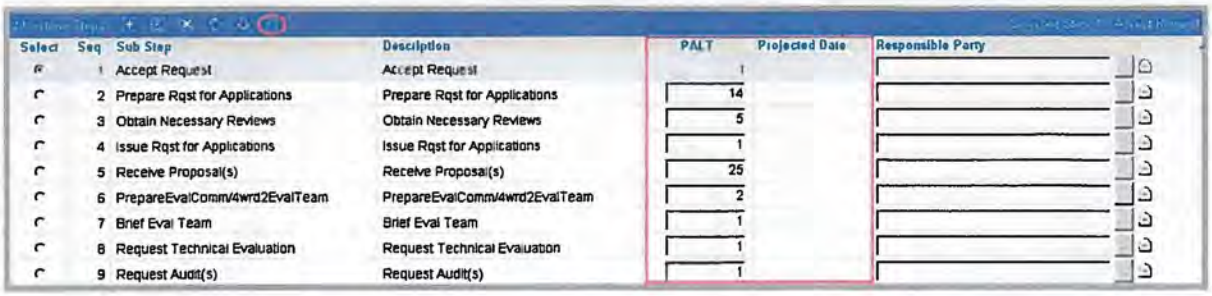


Figure 8: Add Milestone Steps Screen

Steps	Section	User Action	Guidance
9.	Add Milestone Steps	Select a **Search** list criteria by "Code," "Description," "Field Name" or "PALT" and enter the appropriate value in the **For** field. Click the **Display** button. Click a **Code** link to select a Milestone Step.	When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.



Select	Seq	Sub Step	Description	PALT	Projected Date	Responsible Party
	1	Accept Request	Accept Request	1		
	2	Prepare Rqst for Applications	Prepare Rqst for Applications	14		
	3	Obtain Necessary Reviews	Obtain Necessary Reviews	5		
	4	Issue Rqst for Applications	Issue Rqst for Applications	1		
	5	Receive Proposal(s)	Receive Proposal(s)	25		
	6	PrepareEvalComm/4wrd2EvalTeam	PrepareEvalComm/4wrd2EvalTeam	2		
	7	Brief Eval Team	Brief Eval Team	1		
	8	Request Technical Evaluation	Request Technical Evaluation	1		
	9	Request Audit(s)	Request Audit(s)	1		

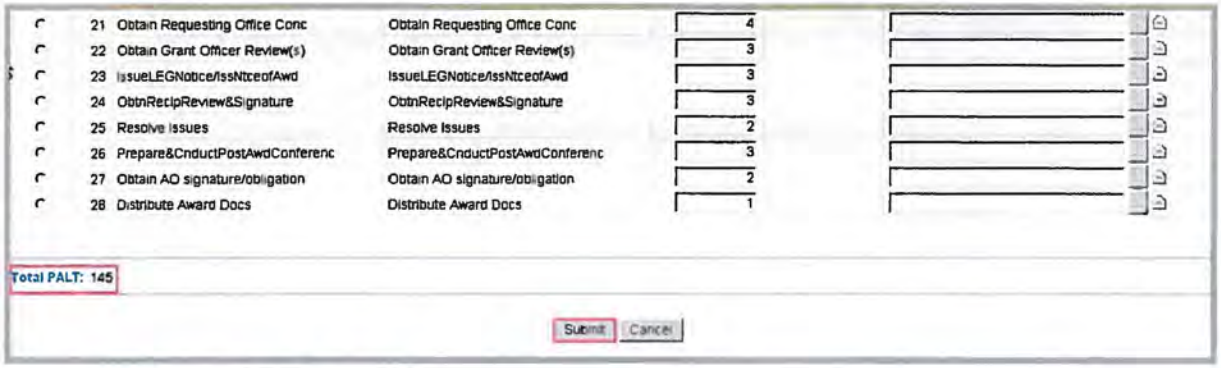
Figure 9: Milestone Steps Screen

Steps	Section	User Action	Guidance
10.	Milestone Steps	To change the length of time allowed for a step, type the new number of days in the **PALT** field for that step. Click the calculate button ( ) to determine the **Projected Dates** according to changes made in the **PALT** (not shown).	The **Procurement Action Lead Times (PALT)** column shows the number of days that are anticipated between each task. Some of the **PALT** fields cannot be edited. The lengths of time for these steps have been pre-set by your system site administrator Once you have set the baseline, the **Projected Dates** will move to the **Original Date** column—visible by scrolling to the right—and a record of them will be stored in GLAAS (not shown).

Select	Seq	Sub Step	Description	PALT	Projected Date	Responsible Party
	1	Accept Request	Accept Request	1		ABECK
	2	Prepare Rqst for Applications	Prepare Rqst for Applications	14		ABECK
	3	Obtain Necessary Reviews	Obtain Necessary Reviews	5		MKAMAN
	4	Issue Rqst for Applications	Issue Rqst for Applications	1		MKAMAN
	5	Receive Proposal(s)	Receive Proposal(s)	25		ABECK
	6	PrepareEvalComm/4wrd2EvalTeam	PrepareEvalComm/4wrd2EvalTeam	2		RRIOS
	7	Brief Eval Team	Brief Eval Team	1		RRIOS
	8	Request Technical Evaluation	Request Technical Evaluation	1		RRIOS
	9	Request Audit(s)	Request Audit(s)	1		ABECK
	10	Perform Cost Analysis/Receive	Perform Cost Analysis/Receive	15		RRIOS
	11	Receive Audit(s)	Receive Audit(s)	15		ABECK

Figure 10: Milestone Steps Screen

Steps	Section	User Action	Guidance
11.	Milestone Steps	Click the lookup button ( ) to assign a **Responsible Party**. Click the notifications button ( ) to create either a "Reminder of Action," a "Completed Action" or a "Missed Due Date" notification for each Milestone Step (optional).	When you assign a **Responsible Party,** GLAAS will automatically add this item as a task in that user's Inbox Task List.



21	Obtain Requesting Office Conc	Obtain Requesting Office Conc	4	
22	Obtain Grant Officer Review(s)	Obtain Grant Officer Review(s)	3	
23	IssueLEGNotice/IssNtceofAwd	IssueLEGNotice/IssNtceofAwd	3	
24	ObtnRecipReview&Signature	ObtnRecipReview&Signature	3	
25	Resolve Issues	Resolve Issues	2	
26	Prepare&CnductPostAwdConferenc	Prepare&CnductPostAwdConferenc	3	
27	Obtain AO signature/obligation	Obtain AO signature/obligation	2	
28	Distribute Award Docs	Distribute Award Docs	1	

Total PALT: 145

Submit Cancel

Figure 11: Milestone Steps Screen

Steps	Section	User Action	Guidance
11. cont.	Milestone Steps	Once you have finished modifying the Milestone Plan, scroll to the bottom of the **Milestone Steps** section and review the Total PALT number. Click the **Submit** button.	The system will automatically calculate the **Total PALT** for this Milestone Plan once you click **Submit** or the calculate button ( ).

Figure 12: Main / General Screen

Steps	Section	User Action	Guidance
12.	Main / General	Click the **Link** toolbar button.	The next step is to link the Milestone Plan to a GLAAS Requisition.

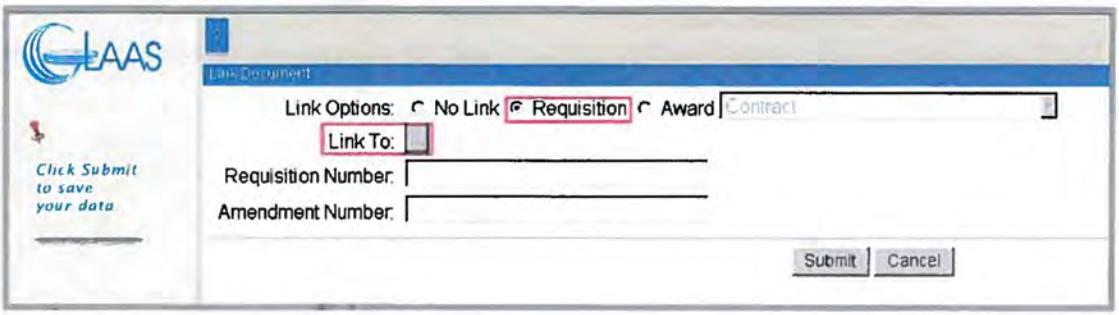


Figure 13: Link Document Screen

Steps	Section	User Action	Guidance
13.	Link Document	Select the **Requisition** radio button to link this Milestone Plan to a Requisition. Click the lookup button ( ) next to the **Link To** field to find a Requisition.	

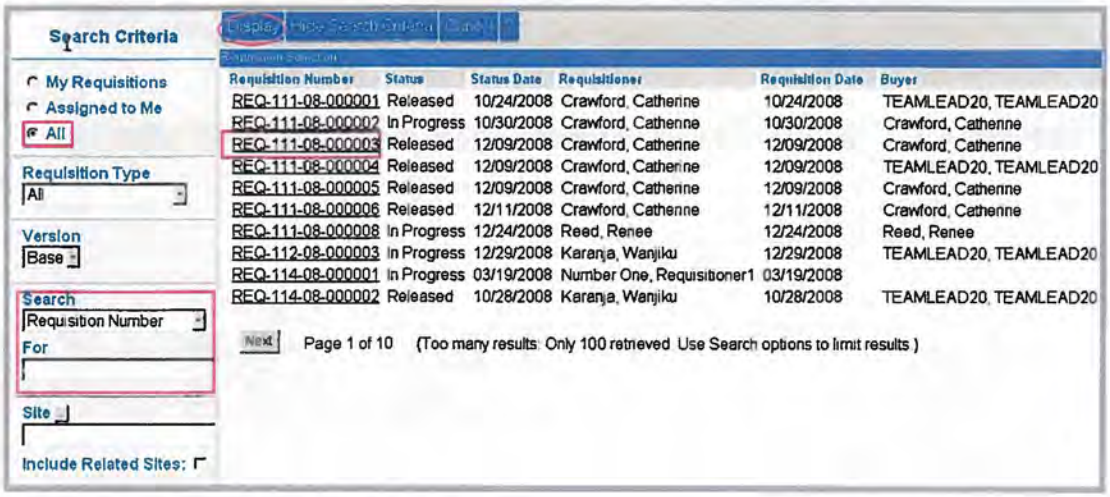


Figure 14: Requisition Selection Screen

Steps	Section	User Action	Guidance
14.	Requisition Selection	Select **Assigned to Me** or **All** when searching for a Requisition. Choose the appropriate **Search** field and enter information into the **For** field. Click the **Display** toolbar button to display a list of requisitions that meet your search criteria.	Only "Released" Requisitions should be selected.
15.	Requisition Selection	Click a **Requisition Number** link to select a Requisition.	

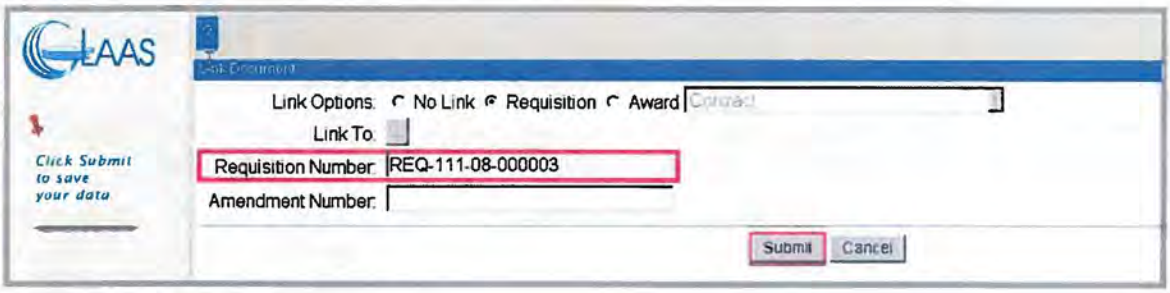


Figure 15: Link Document Screen

Steps	Section	User Action	Guidance
16.	Link Document	Click the **Submit** button to continue.	The Requisition Number appears in the **Requisition Number** field. Each Milestone Plan can only be associated with one Requisition. However, a requisition can be linked to multiple Milestone Plans.

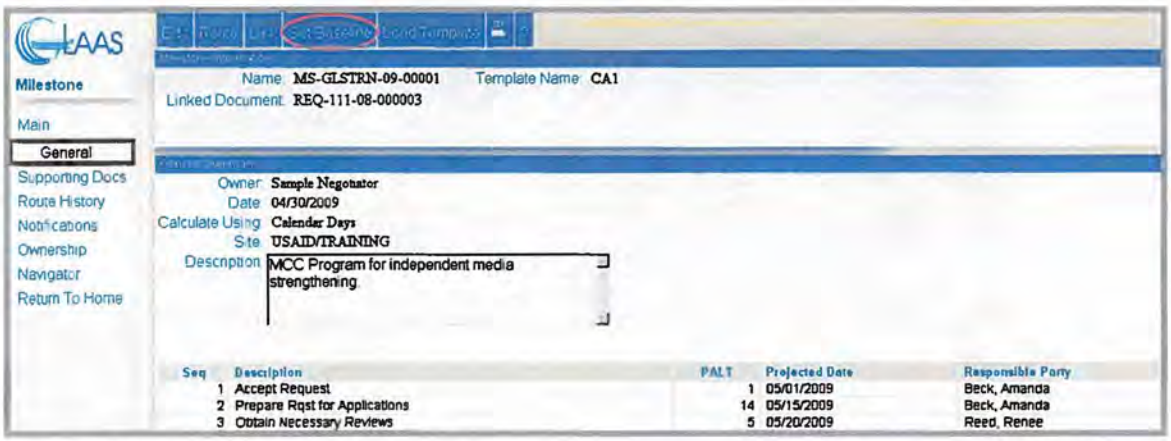


Figure 16: Main / General Screen

Steps	Section	User Action	Guidance
17.	Main / General	If necessary, add supporting documents to the Milestone Plan using the **Supporting Docs** link on the left-hand menu (not shown). Click the **Set Baseline** toolbar button.	All supporting documents need to be attached before a Baseline is set. Refer to the *Adding Attachments and Supporting Documentation* user guide for more information. The final step after creating the Milestone Plan is to **Set Baseline.** Once you set the baseline, GLAAS will edit the Milestone plan based on changes made to the original Milestone Template. Make sure you link the Milestone Plan to a Requisition before you set the baseline.
18.	Main / General	GLAAS asks if you want to set the baseline for this Milestone Plan (not shown). • Click the **Yes** button to set the baseline. OR • Click the **No** button to return to the **Main / General** screen.	Setting the baseline starts the clock on your PALT dates. Setting a baseline finalizes the details of the plan and begins the tracking process. Once the baseline has been set, you can no longer link a document or load a template. Most data becomes read only and automatically generated.

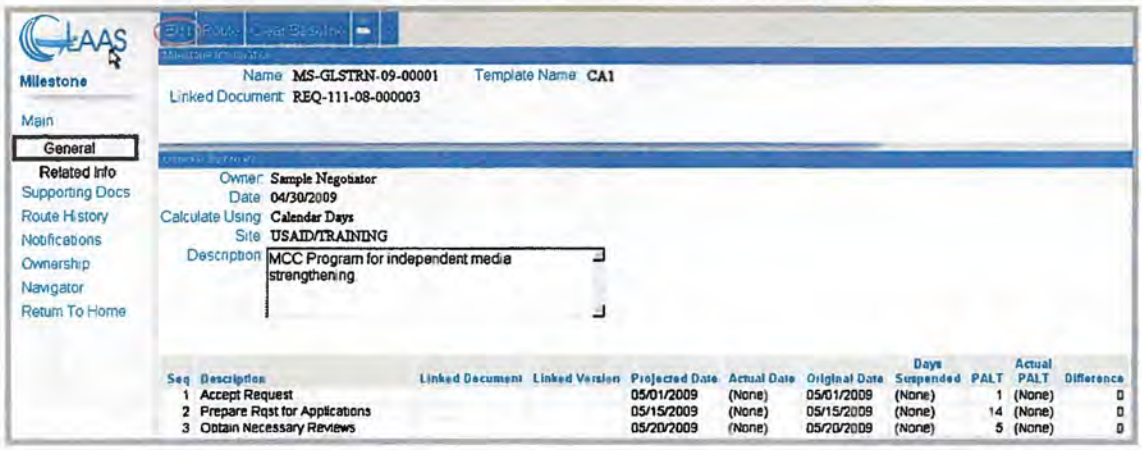


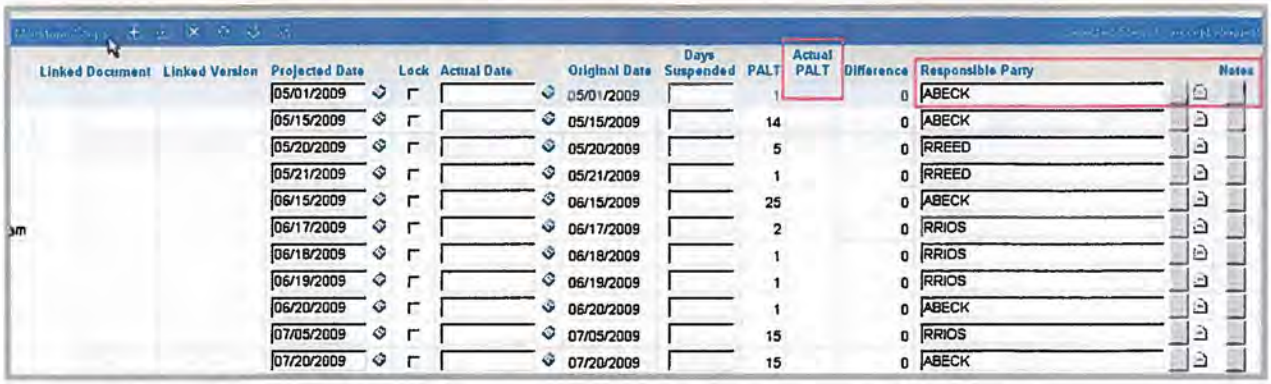
Figure 17: Main / General Screen

Steps	Section	User Action	Guidance
19.	Main / General	Click the **Edit** toolbar button to edit the Milestone Plan.	The Milestone Plan is successfully associated with a Requisition and a baseline is set and ready for execution. You can still edit the Milestone Plan even after it has been baselined. As you start to execute the plan, you will edit the Milestone Plan to enter actual dates or edit projected dates, responsibilities, PALTs, etc. For example, due dates may change or there may be unavoidable delays. GLAAS will track the actual dates of these tasks against the projected dates in the Milestone Plan. Once a baseline has been set, the **Clear Baseline** toolbar button appears. It allows you to remove the baseline and reset the tracking process.

Seq	Description	Linked Document	Linked Version	Projected Date	Lock	Actual Date	Original Date	Days Suspended	PALT
1	Accept Request			05/01/2009			05/01/2009		1
2	Prepare Rqst for Applications			05/15/2009			05/15/2009		14
3	Obtain Necessary Reviews			05/20/2009			05/20/2009		5
4	Issue Rqst for Applications			05/21/2009			05/21/2009		1
5	Receive Proposal(s)			06/15/2009			06/15/2009		25
6	PrepareEvalComm/4wrd2EvalTeam			06/17/2009			06/17/2009		2
7	Brief Eval Team			06/18/2009			06/18/2009		1
8	Request Technical Evaluation			06/19/2009			06/19/2009		1
9	Request Audit(s)			06/20/2009			06/20/2009		1
10	Perform Cost Analysis/Receive			07/05/2009			07/05/2009		15
11	Receive Audit(s)			07/20/2009			07/20/2009		15

Figure 18: Milestone Steps Screen

Steps	Section	User Action	Guidance
20.	Milestone Steps	Modify the following fields: • **Lock**: Check the box to freeze this date to prevent it from changing by other date calculations. • **Actual Date**: Enter the date the task was actually completed. • **Days Suspended**: Enter the number of days a step is suspended.	These fields will be pre-populated according to the Milestone Plan template: • **Description**: Describes the Milestone Step. • **Linked Document**: Indicates if this step is directly linked to a GLAAS action/document. • **Linked Version**: Indicates which version of the document is linked to this step (Base vs. Amended). • **Projected Date**: Displays the estimated completion date for this step. • **Original Date**: Displays the original completion date from the baseline version. • **PALT**: The planned Procurement Action Lead Time. GLAAS displays the Milestone Steps screen to show fields you have worked with earlier and additional new fields. **Days Suspended**: GLAAS will not count these days when calculating the difference between the baselined PALT and the actual PALT.



Linked Document	Linked Version	Projected Date	Lock	Actual Date	Original Date	Days Suspended	PALT	Actual PALT	Difference	Responsible Party	Notes
		05/01/2009			05/01/2009		1		0	ABECK	
		05/15/2009			05/15/2009		14		0	ABECK	
		05/20/2009			05/20/2009		5		0	RREED	
		05/21/2009			05/21/2009		1		0	RREED	
		06/15/2009			06/15/2009		25		0	ABECK	
		06/17/2009			06/17/2009		2		0	RRIOS	
		06/18/2009			06/18/2009		1		0	RRIOS	
		06/19/2009			06/19/2009		1		0	RRIOS	
		06/20/2009			06/20/2009		1		0	ABECK	
		07/05/2009			07/05/2009		15		0	RRIOS	
		07/20/2009			07/20/2009		15		0	ABECK	

Figure 19: Milestone Steps Screen

Steps	Section	User Action	Guidance
20. cont.	Milestone Steps	Modify the following fields: • **Actual PALT**: Enter the actual PALT. • **Responsible Party**: Click the lookup button ( ) to assign a Responsible Party. • **Notification**: Click the notifications button ( ) to create either a "Reminder of Action," a "Completed Action," or a "Missed Due Date" notification for each Milestone Step (Optional). • **Notes**: Click the lookup button ( ) to add Notes about the specific Milestone step. Click the **Submit** button (not shown).	After a **Note** has been entered for a Milestone Step, the icon will change from a lookup button ( ) to an asterisk button ( ) (not shown). You have the option to print these **Notes** on your Milestone Plan. The **Difference** field is the difference between the planned and actual PALTs.

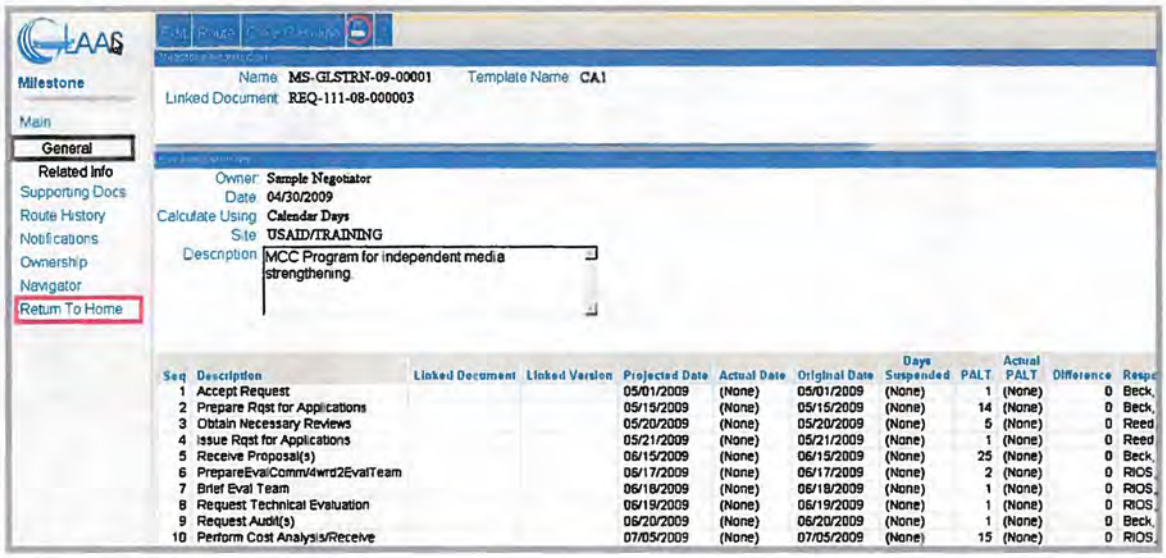


Figure 20: Main / General Screen

Steps	Section	User Action	Guidance
21.	Main / General	Click the printer toolbar button ( ) to print the Milestone Plan. A pop-up window will appear asking if you would like to print the **Notes.** Click the **Return to Home** link to return to the GLAAS Welcome Page (not shown).	GLAAS will generate a PDF outside the system that can be saved, printed or emailed.

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Creating a Purchase Order

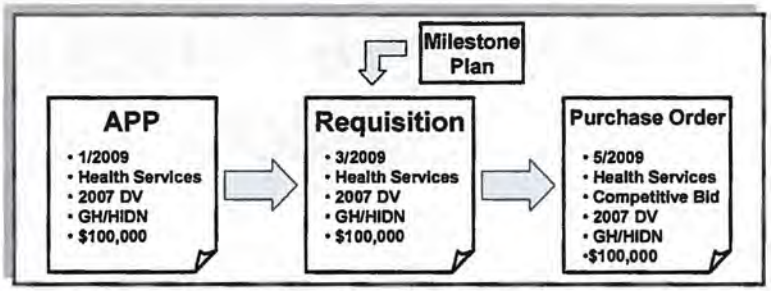
December 2009

Creating a Purchase Order Objectives

- At the end of this topic, you will know how to:
  - Create purchase orders
  - Use a purchase card with a purchase order
  - Route the award
  - Report the award to FPDS-NG

Creating a Purchase Order

1. An APP is created to plan the procurement
2. The Requisition is created and associated to an APP
3. The Requisition is released and funds are committed in Phoenix
4. The Milestone Plan is created and linked to a Requisition
5. The Purchase Order is created from the Requisition



Creating a Purchase Order Roles & Responsibilities

- The A&A Specialist –
  - Creates the purchase order from a requisition
  - Generates the award package
  - Reports the award to FPDS-NG
  - Shares the finalized award with the COTR's site
- The Contracting Officer or EXO –
  - Approves the purchase order to initiate the obligation in Phoenix
  - Finalizes the FPDS-NG record

Creating a Purchase Order

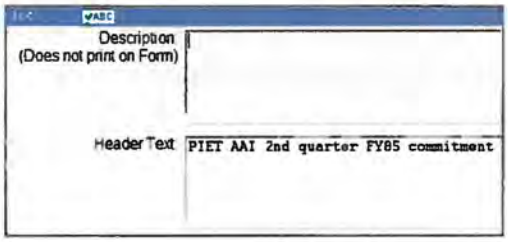
- Have a numbering mask with the instrument code "O"
  - e.g., AID-OAA-O-09-00006
- Use the OF-347 cover page
- Use the applicable Simplified Acquisition Procedure clause template in GLAAS

Creating a Mission Purchase Order

- The GLAAS Document Type "Purchase Order" is also used for a Mission Purchase Card Order
- Have a numbering mask with the instrument code "V"
  - e.g., AID-OAA-V-09-00003

Header Text

- The first 50 characters of Header Text is transferred to the Title field of the commitment or obligation in Phoenix
- It must be short, meaningful and consistent



Header Text Standards – Awards

- Contract or Grant:
  - Program name (acronym), vendor
  - Example: PIET, AAI
- Purchase order:
  - Purpose (without any lead in)
  - Example: Newspaper subscription
- PSC Contract:
  - Name of vendor, office
  - Example: John Doe, EGAT

GLAAS 102 USER GUIDE:

CREATING A PURCHASE ORDER

PURPOSE:

This user guide will illustrate how to create a Purchase Order from a Requisition.

BEFORE STARTING:

1. A Requisition has been assigned to you in your Buyer Workload with the status of "Released."
2. A Milestone Plan has been created, linked to a Requisition, and baselined.
3. In order to create a Purchase Order, you must be an A&A Specialist, EXO or a Contracting Officer.
4. In order to approve a Purchase Order, you must be a Contracting Officer or EXO.

STEPS:

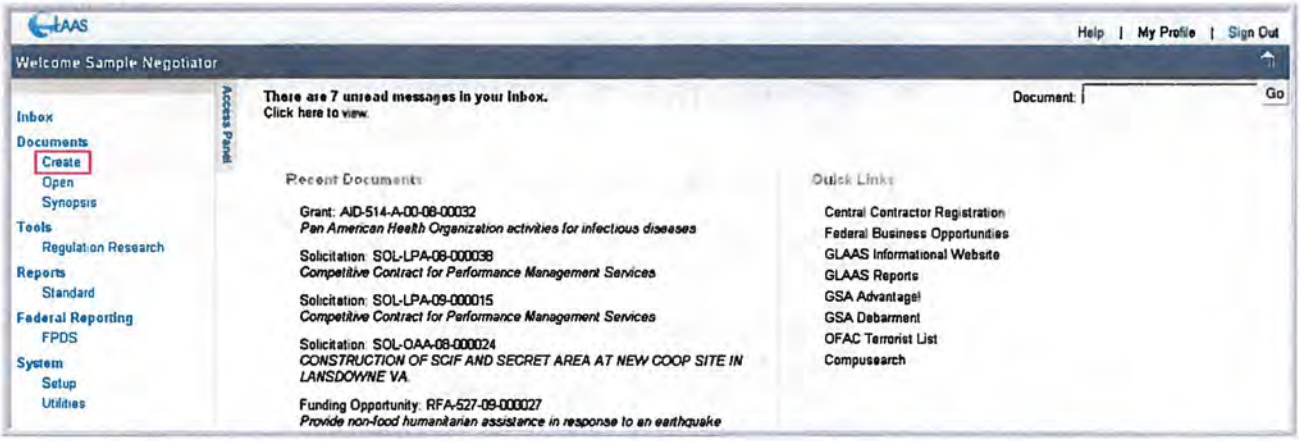


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

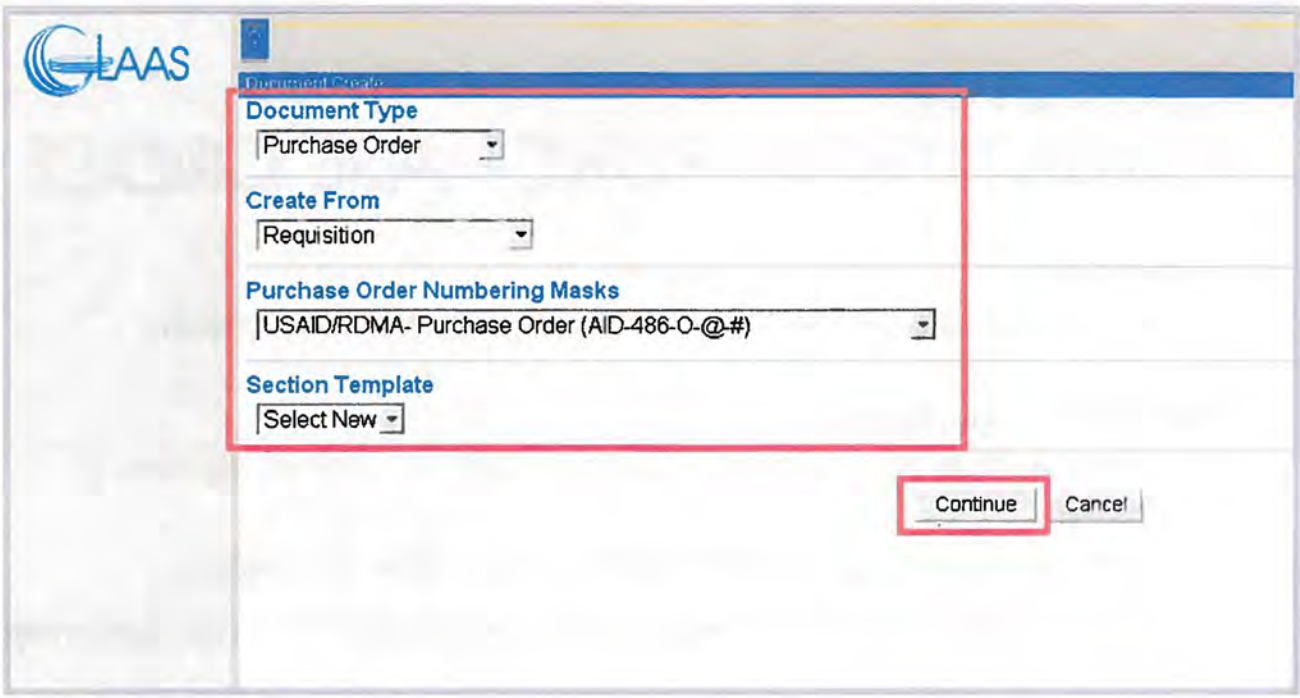


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Purchase Order." • **Create From:** Select "Requisition." • **Purchase Order Numbering Masks:** Select a numbering mask. • **Section Template:** Select "Select New" to load a clause template now or select "None" to add a template later.	GLAAS uses different instrument codes for different types of purchase orders: • "O" = Purchase Orders • "V" = Mission Purchase Card Orders
4.	Document Create	Click the **Continue** button.	

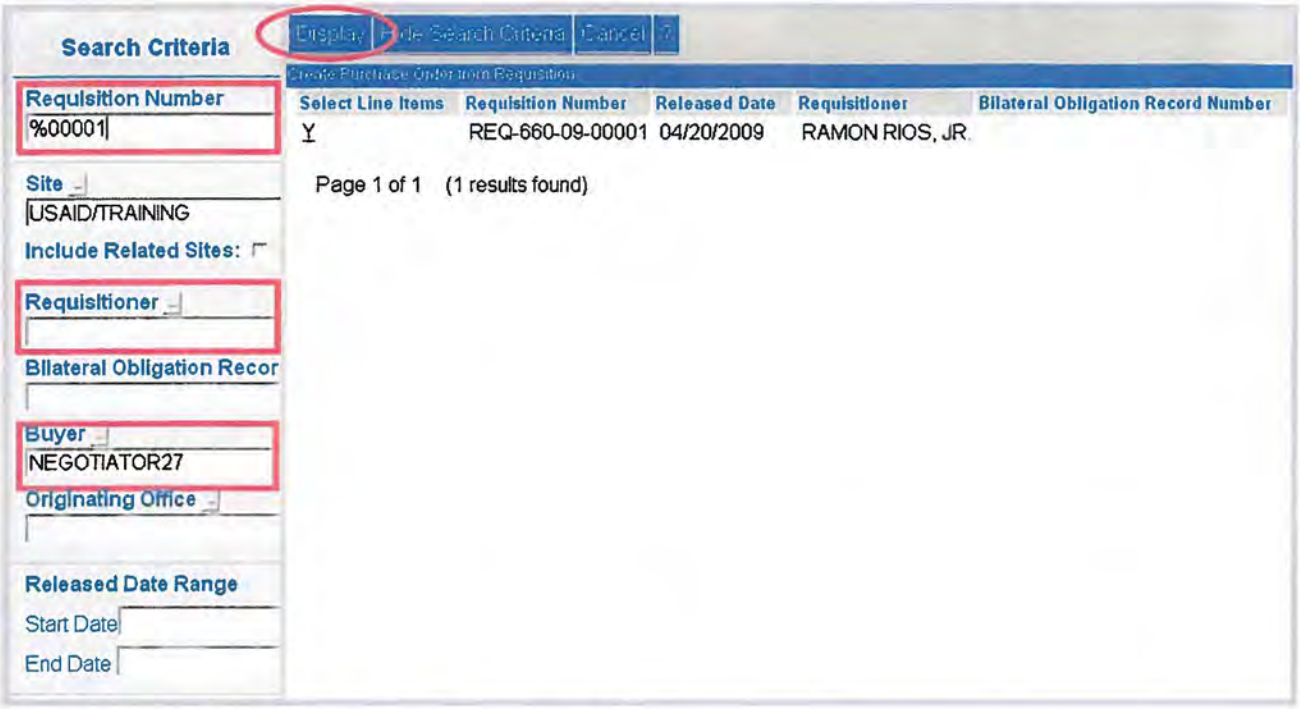


Figure 3: Create Purchase Order from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Purchase Order from Requisition	Search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor. Clear the **Site** field when searching for a document or a user.

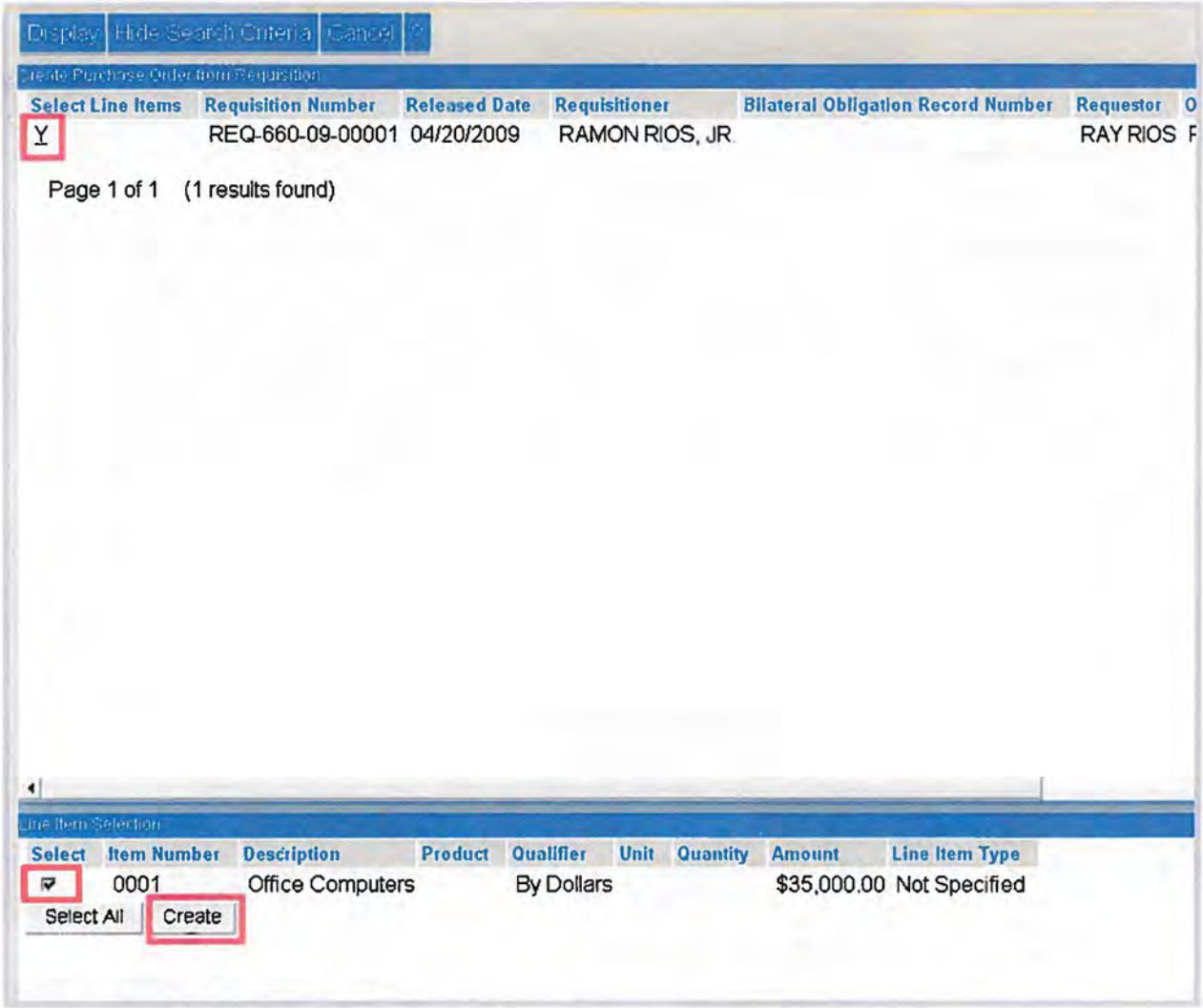


Figure 4: Create Purchase Order from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Purchase Order from Requisition	Click the **Y** link in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
7.	Create Purchase Order from Requisition	Check the box in the **Select** column for each line item you want to pull into the Purchase Order from the Requisition. Click the **Create** button.	

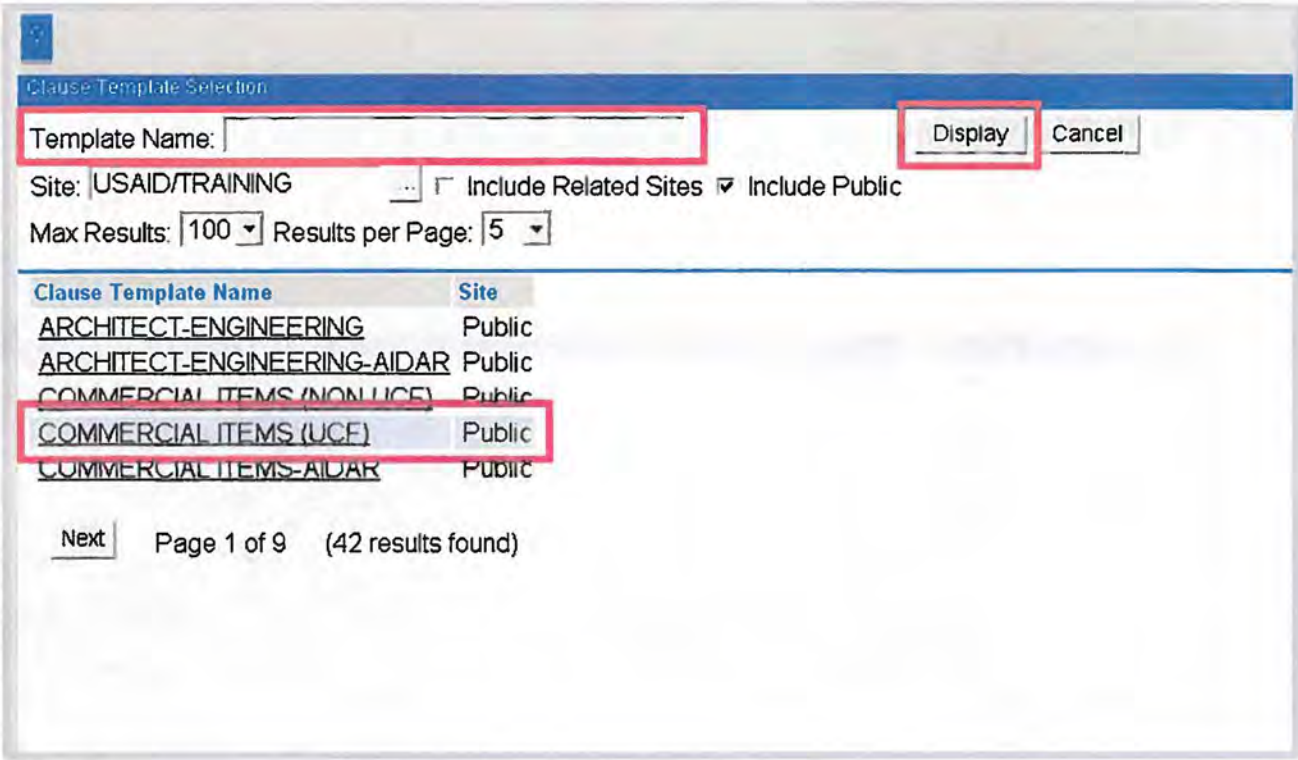


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Search for a Clause Template by **Template Name**. Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause Templates include the basic FAR and AIDAR clauses you need for a Purchase Order. You must add the FAR clauses first; you will add the AIDAR clauses later. AIDAR templates always display "AIDAR" in the template name.

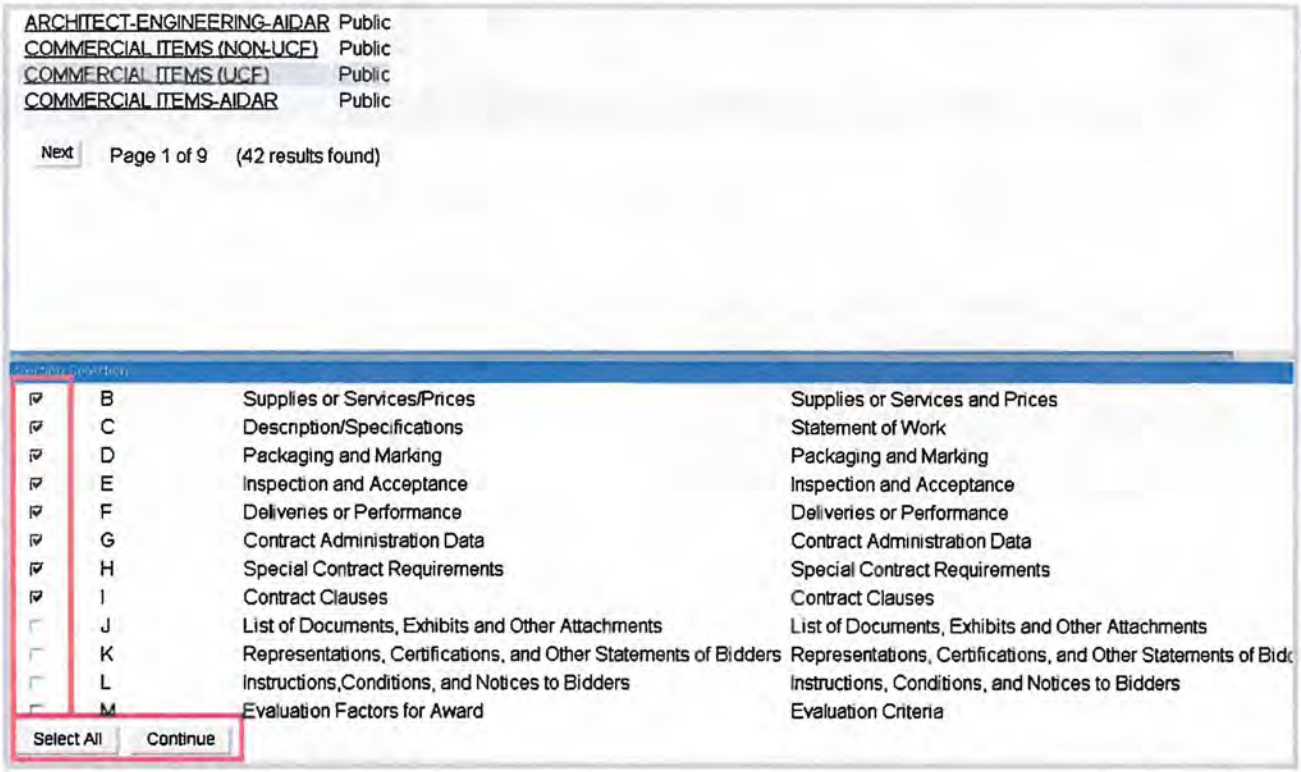


Figure 6: Clause Template Selection Screen

Steps	Section	User Action	Guidance
9.	Clause Template Selection	Click the **Select All** button to include all of the clause sections in your Purchase Order. OR Check the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS document.
10.	Clause Template Selection	Click the **Continue** button to pull the clauses into your Purchase Order.	

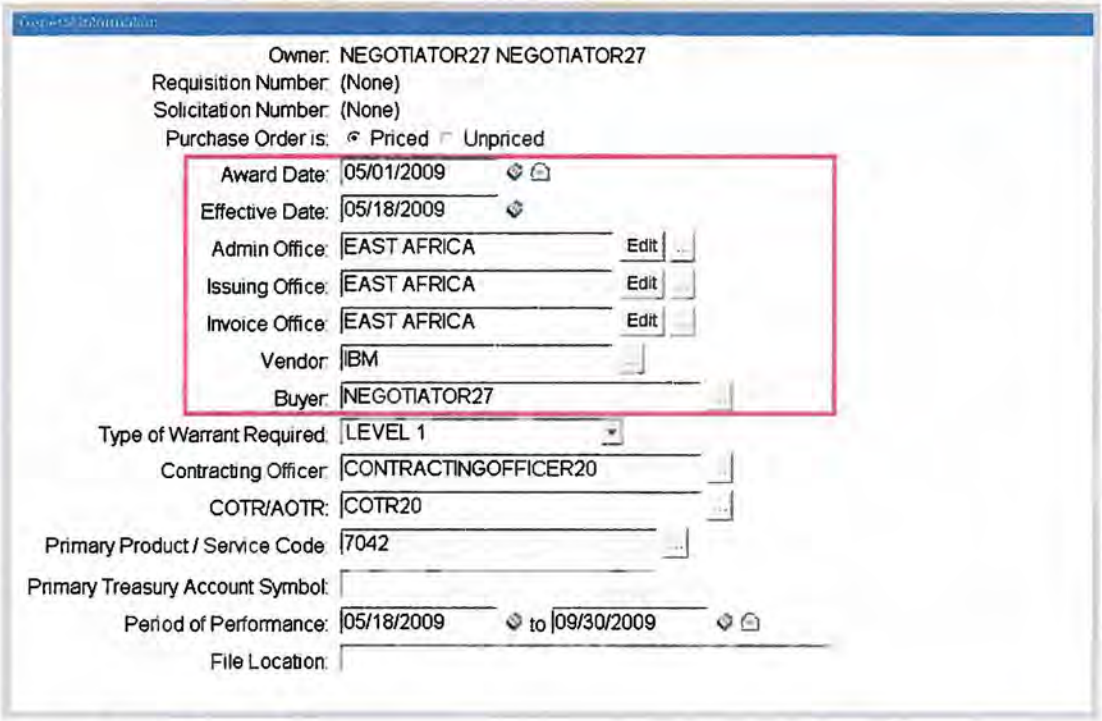


Figure 7: Main / General Screen

Steps	Section	User Action		Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields:		GLAAS will auto-populate various fields based on the Requisition and system defaults. You may edit these fields. Click the **Edit** button (Edit) to modify office addresses will appear on forms. USAID is not currently using the **Purchase Order is Priced/Unpriced** field. Vendors assigned one of three special DUNS numbers in Phoenix will have their Vendor Name obscured in the Federal Procurement Data System-Next Generation (FPDS-NG): • For a sensitive domestic contractor, assign DUNS 790238638. • For a sensitive foreign contractor, assign DUNS 790238851. • For a miscellaneous foreign contractor, assign DUNS 123456787.
		Award Date: Enter the date the award is signed.	R	
		Effective Date: Enter the Award's Period of Performance Start date.	R	
		Admin Office: Select the code for the Contracting Officer Technical Representative's (COTR) office.	R	
		Issuing Office: Select the code for the contracting office.	R	
		Invoice Office: Select the code for the office which receives the vendor invoice.	R	
		Vendor: Select the Vendor code for this award.	R	
		Buyer: Select the A&A Specialist for this award.	R	

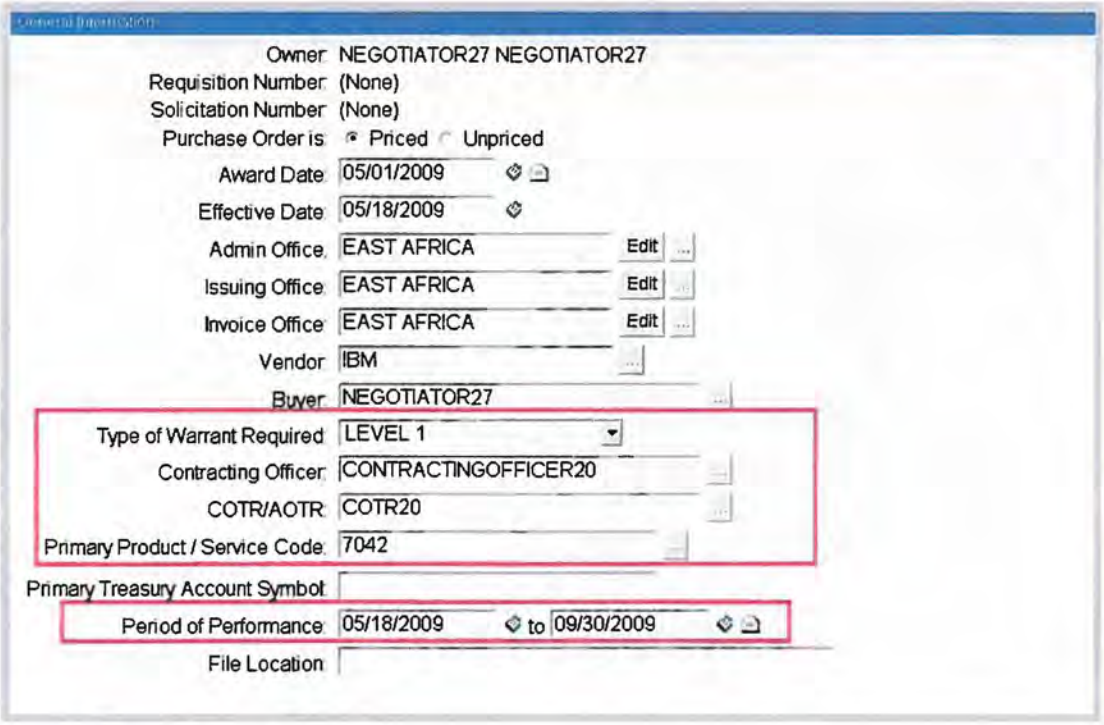


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
11. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Type of Warrant Required:** Select a warrant level. — R **Contracting Officer:** Select the Contracting Officer for this award. — R **COTR/AOTR:** Select the COTR for this award. — R **Primary Product/Service Code:** Select the code for the goods or services on the award used to report to the Federal Procurement Data System-Next Generation (FPDS-NG). — R **Period of Performance:** Enter the current active period of the award. — R **File Location:** Enter the physical location of any related files. — O	The warrant level is validated against the Award TEC. **Primary Treasury Account Symbol** will be automatically populated by Phoenix once validations have been done. (Do NOT manually populate this field.)
12.	Main / General	Click the **Additional Info** link on the left-hand menu (not shown).	

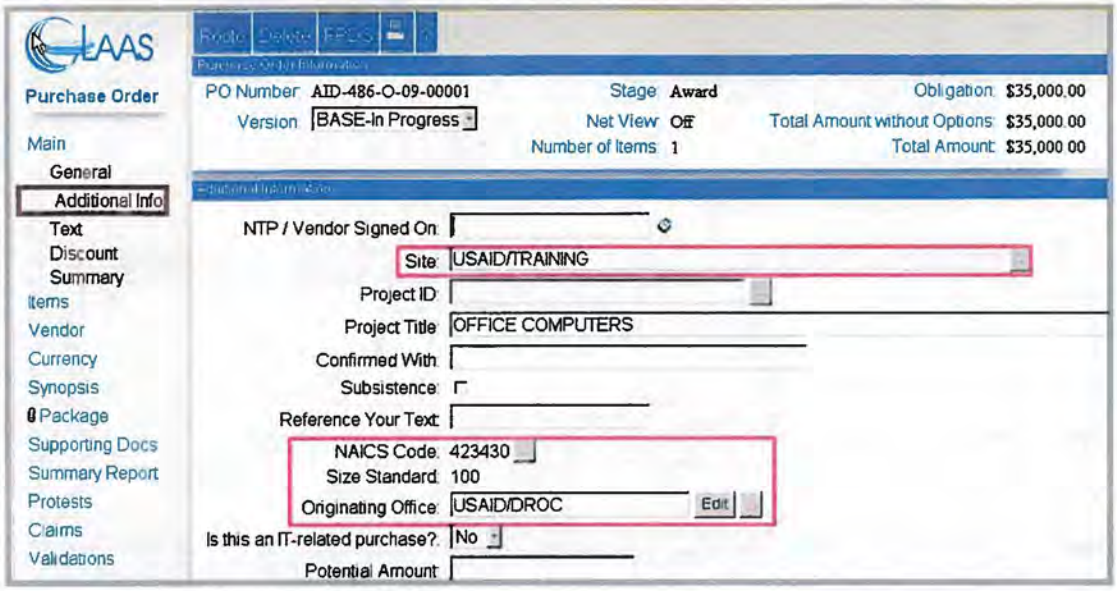


Figure 9: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		**Size Standard** will auto-populate when the **NAICS Code** is selected. USAID is not currently using the **Project ID** field.
		NTP/Vendor Signed On: Enter the date the "Notice to Proceed" was issued or the date the vendor acknowledged the order.	O	
		Site: Defaults to the site of the Requisition.	R	
		Project Title: The Project Title will populate from the Requisition if it was associated to an APP.	O	
		Confirmed With: Use this field if you want the system to print the following on the award: "Do not duplicate, confirm order with _____."	O	
		Subsistence: Check the box if the award is for food or shelter.	O	
		NAICS Code: Select the appropriate code from the list.	R	
		Originating Office: Select the code for the requesting office.	R	

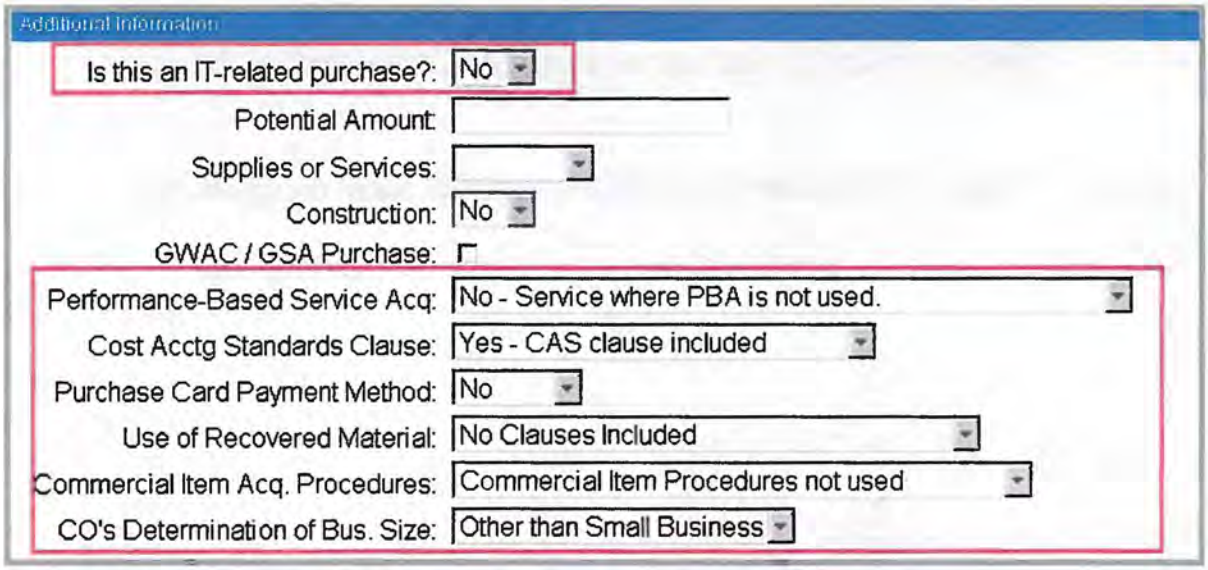


Figure 10: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Potential Amount** • **Supplies or Services** • **Construction** • **GWAC / GSA Purchase**
		Is this an IT-related purchase?: Select "Yes" if this is related to an IT purchase.	R	
		Performance-Based Service Acq: Select the appropriate value from the dropdown list.	R	
		Cost Acctg Standards Clause: Select the appropriate value from the dropdown list.	R	
		Purchase Card Payment Method: Select "Yes" if a purchase card was used.	R	
		Use of Recovered Material: Select the appropriate value from the dropdown list.	R	
		Commercial Item Acq. Procedures: Select the appropriate value from the dropdown list.	R	
		CO's Determination of Bus. Size: Select the appropriate value from the dropdown list.	R	

Preferences

SBA Contract Number:

FPDS NG

PIID	Referenced PIID	FPDS Approval Number	Date Finalized
(None)			

GDA Flag	NO	
Payment method	DIRECT	Direct Reimbursement
Environmental Determination Document Name	DCN#	
Place of Performance	000	United States of America
Authorized Geographical Code	000	United States of America

Figure 11: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		The lower portion of the **Additional Info** screen contains USAID-specific "flex fields."
		SBA Contract Number: Type the SBA contract number, if applicable.	O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required.
		GDA Flag: Select "YES" if this action is for a Global Development Alliance initiative.	R	If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.
		Payment Method: Select from the list how the award will be paid.	R	Once the system interfaces with FPDS-NG, it will auto-populate the **PIID** and the **FPDS Approval Number**.
		Environmental Determination Document Name: Enter a document title (if applicable), otherwise enter "N/A."	R	All awards over $3,000 must be reported to FPDS-NG.
		Place of Performance: Select the three-digit code indicating the country where the work will be performed.	R	
		Authorized Geographical Code: Select the three-digit code indicating the country that is authorizing the work to be done.	R	

22 CFR 216 Compliance Status	APPROVED BY BEO	Approved by BEO
Benefiting Country Code	000	United States of America
Subcontract/Subgrant Plan Required	NO	No
Performanced Based Contract/Results Oriented Grant	NO	No
Name of Subcontractor/Subgrantee		
Vessel Flag Priority		
Leveraging		
Purchase Card Alias		
Grants Under Contract/Contracts Under Grant		

Figure 12: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		The **Purchase Card Alias** field is not applicable on the **Purchase Order** document.
		22 CFR 216 Compliance Status: Select an environmental compliance status code.	R	
		Benefiting Country Code: Select the code of the country that will benefit from this action.	R	
		Subcontract/Subgrant Plan Required: Select "YES" if a subcontract/subgrant plan is required.	R	
		Performance Based Contract/ Results Oriented Grant: Select "YES" if this will be a performance-based contract.	R	
		Name of Subcontractor / Subgrantee: Enter the name of the subcontractor/subgrantee, if applicable.	O	
		Vessel Flag Priority: Enter the flag priority, if applicable.	O	
		Leveraging: Enter a value if this award was leveraged, if applicable.	O	
		Grants Under Contract / Contracts Under Grant: Select "YES" if Grants Under Contract (GUCs) is authorized.	O	

Acctg Period		
Reporting Acctg Period		
Action Type	PO	Purchase Order
Award TEC	35000	
NMS Award Fee Amount		
NMS Award Other Amount		
AIDAR/Agency Exemptions to Competition	0	Not Applicable
Competition (Yes/No)	NO	NO
Earmark/Directive/Other	N/A	Not Applicable
Earmark/Directive/Other Description		
Requisition Number (for mods only)	0	Not Applicable
Send notification to Requestor(s) of unused funds on the Requisition?	YES	YES

Figure 13: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		**NMS Award Fee Amount** and **NMS Award Other Amount** are populated from NMS on Migrated Awards.
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Action Type: Select a code identifying the type of award action.	R	
		Award TEC: Enter the Total Estimated Cost of the Award.	R	
		AIDAR/Agency Exemptions to Competition: Select a code to identify the type of exemption.	R	
		Competition (Yes/No): Select "YES" or "NO" to indicate if this action will be competed or not.	R	

Earmark/Directive/Other	N/A	Not Applicable
Earmark/Directive/Other Description		
Requisition Number (for mods only)	0	Not Applicable
Send notification to Requestor(s) of unused funds on the Requisition?	YES	YES

Figure 14: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Earmark/Directive/Other:** Select a value to indicate if this award action is based on Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — R **Requisition Number (for mods only):** If this is a modification, select the Requisition number. If this is a new award, select "0" for "Not Applicable." — R **Send notification to Requestor(s) of unused funds on the Requisition?:** Select "YES" to send a notification to Requestor(s), advising them of unobligated funds. Select "NO" to not notify the Requestor(s) of unobligated funds. — R	
14.	Main / Additional Info	Click the **Text** link on the left-hand menu (not shown).	

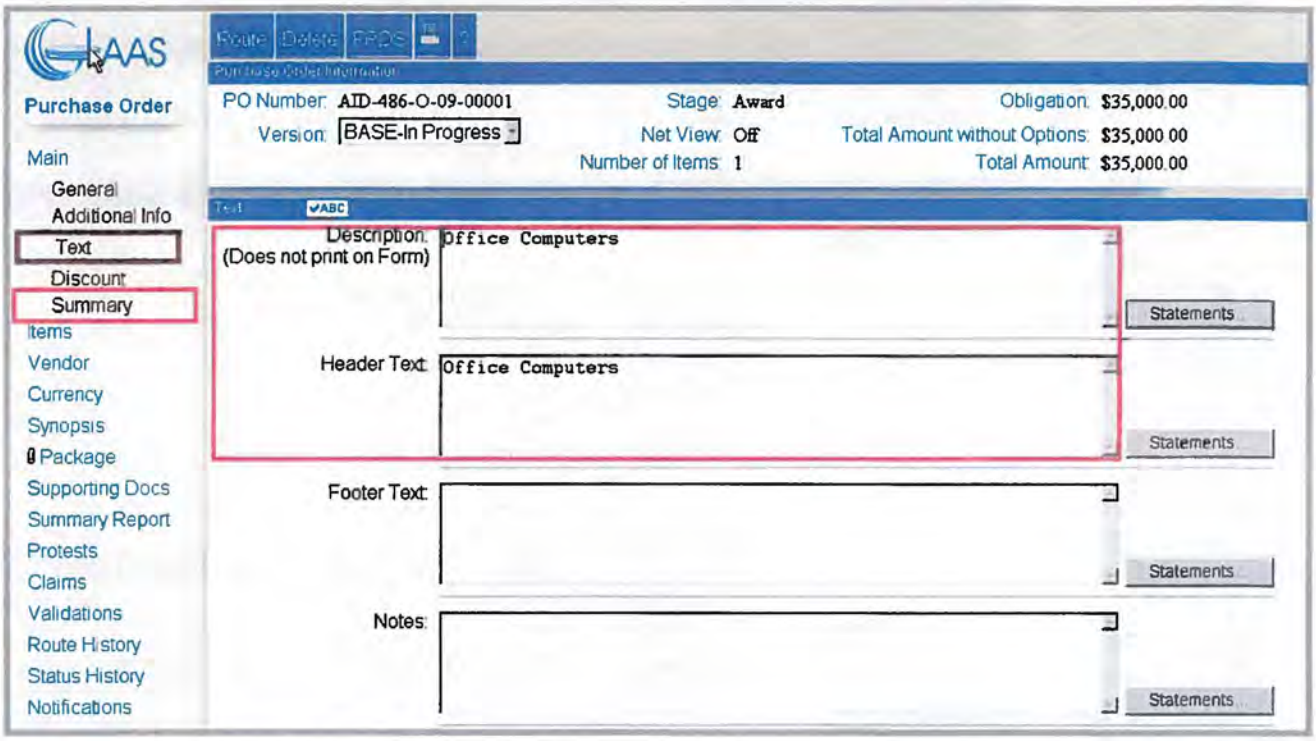


Figure 15: Main / Text Screen

Steps	Section	User Action	Guidance
15.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be purchased with this action. This will not print on the award. — R **Header Text:** Enter a short (50 characters or less) description of the award. This will print out once at the top of the schedule on the award. — R **Footer Text:** Will print out once at the bottom of the schedule on the award. — O **Notes:** Enter any additional text for the award. This will not print on the award. — O	**WARNING!** Do not enter sensitive procurement information in the **Description** field. Each text field will hold up to seven typed pages. The first 255 characters of the **Description** will carry over to the **Description** field in Phoenix. The first 50 characters of the **Header Text** will carry over to the **Title** field in Phoenix. The **Statements** button contains standard language and can be edited once loaded in the field.
16.	Main / Text	Click the **Summary** link on the left-hand menu.	USAID is not currently using the **Discount** link.

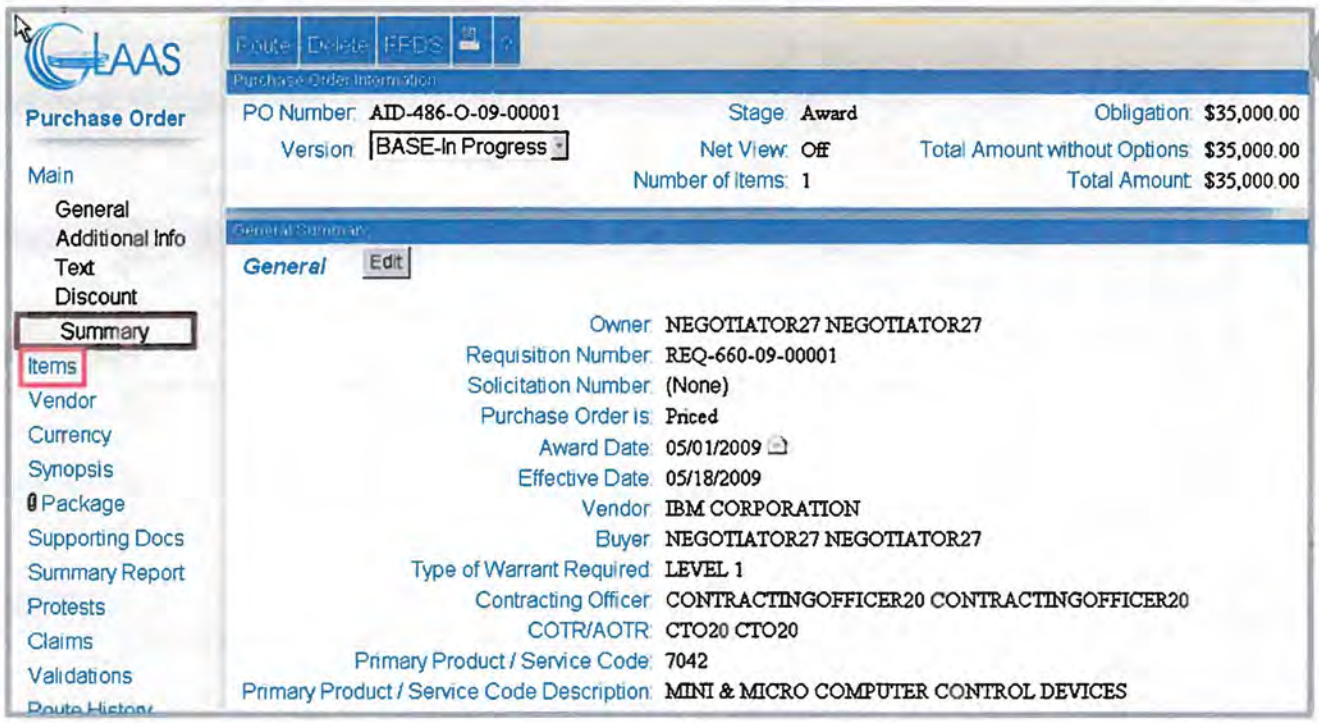


Figure 16: Main / Summary Screen

Steps	Section	User Action	Guidance
17.	Main / Summary	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your document thus far. Click the various **Edit** buttons (Edit) to make any changes.
18.	Main / Summary	Click the **Items** link on the left-hand menu.	

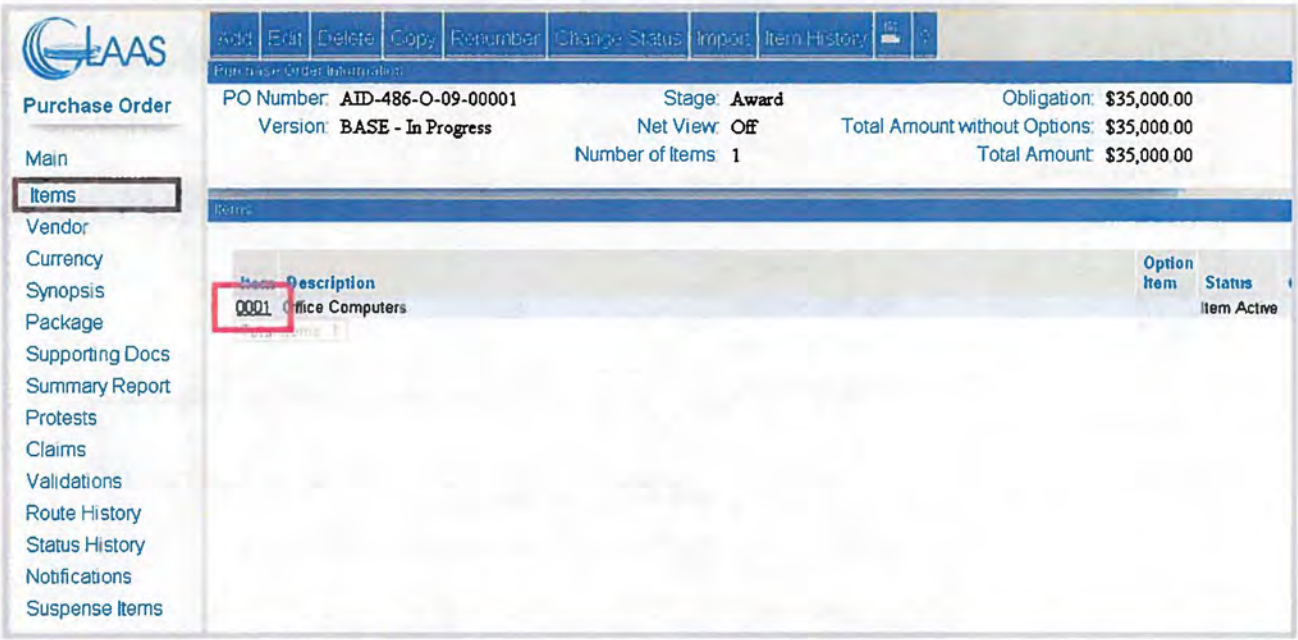


Figure 17: Items Screen

Steps	Section	User Action	Guidance
19.	Items	Click an **Item** number link.	

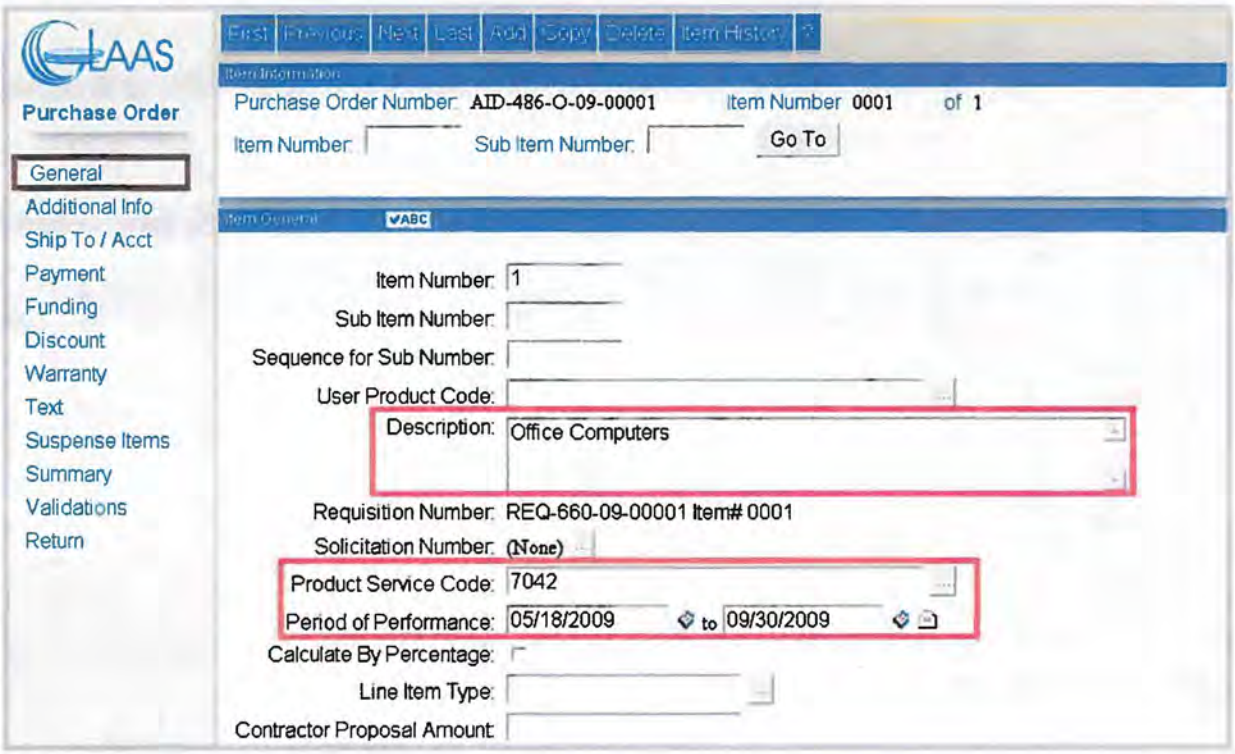


Figure 18: Items / General Screen

Steps	Section	User Action		Guidance
20.	Items / General	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Sub Item Number** • **Sequence for Sub Number** • **User Product Code** • **Calculate By Percentage**
		Description: Enter a description for the item.	R	
		Solicitation Number: To associate a Solicitation to this line item, click the lookup button (...).	O	
		Product Service Code: Enter the code to identify the product or service being ordered.	R	
		Period of Performance: Enter the effective and completion dates for the item.	R	
		Line Item Type: Select one, if applicable.	O	
		Contractor Proposal Amount: This field will auto-populate if the award is created from a solicitation.	O	

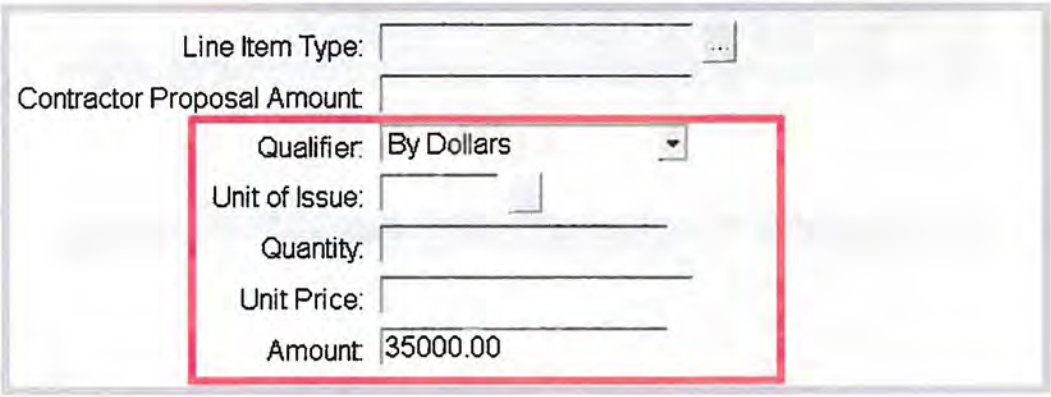


Figure 19: Items / General Screen

Steps	Section	User Action	Guidance
20. cont.	Items / General	Complete the following Required (R) and/or Optional (O) fields: **Qualifier:** Select "By Quantity" or "By Dollars." — R **Unit of Issue/Quantity/Unit Price:** If "By Quantity" was selected as the **Qualifier**, these are required fields. — R/O **Amount:** Enter the total estimated cost for this item if "By Dollars" was selected as the **Qualifier**. — R	The Estimated Total Costs of the items must add up to the Award TEC. The **Estimated Total Cost** of the item must be entered on the **Items / General** screen and in the **Ship To Value** field.
21.	Items / General	Click the **Additional Info** link on the left-hand menu (not shown).	

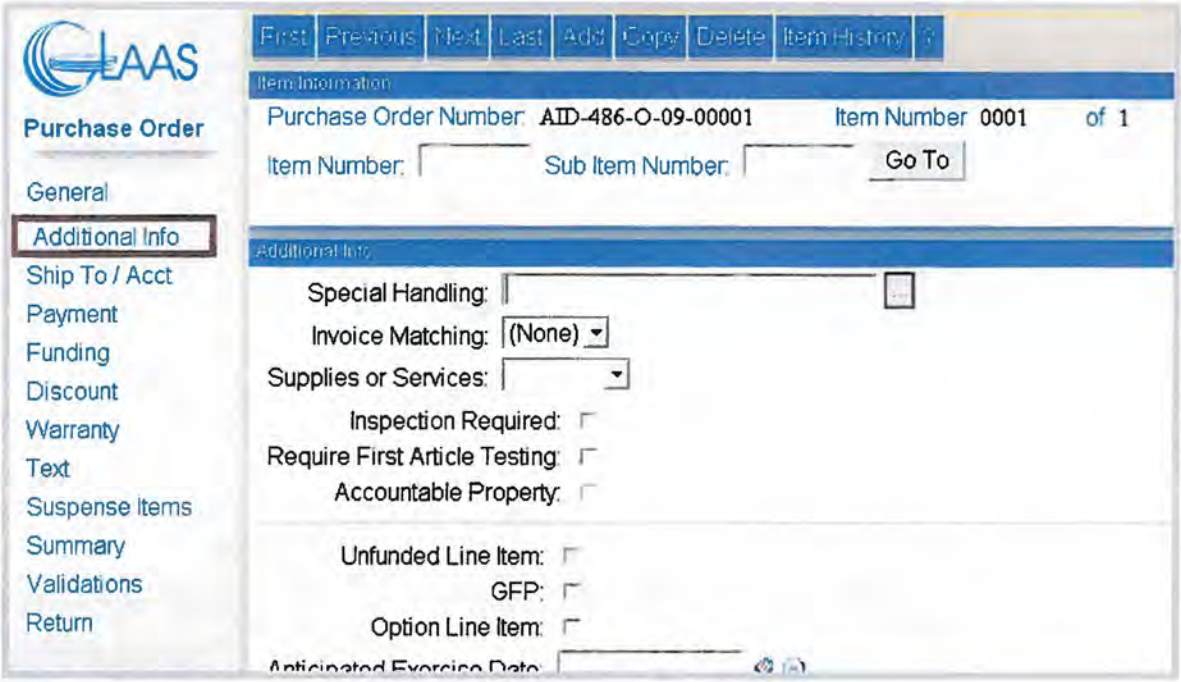


Figure 20: Items / Additional Info Screen

Steps	Section	User Action		Guidance
22.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		Selecting any of the following checkboxes will zero out the obligation of the line item: • **Unfunded Line Item** • **GFP** • **Option Line Item** USAID is not currently using these fields: • **Invoice Matching** • **Supplies or Services** • **Accountable Property**
		Special Handling: Select special handling instructions, if applicable.	O	
		Inspection Required: Check the box if inspection of the supplies are required.	O	
		Require First Article Testing: Check this box if first article testing is required before the full shipment of goods.	O	
		Unfunded Line Item: Check the box if this line item is subject to availability of funds and the accounting information is unknown.	O	
		GFP: If the line item is Government Furnished Property, check this box.	O	
		Option Line Item: Check this box if this is an option line item.	O	

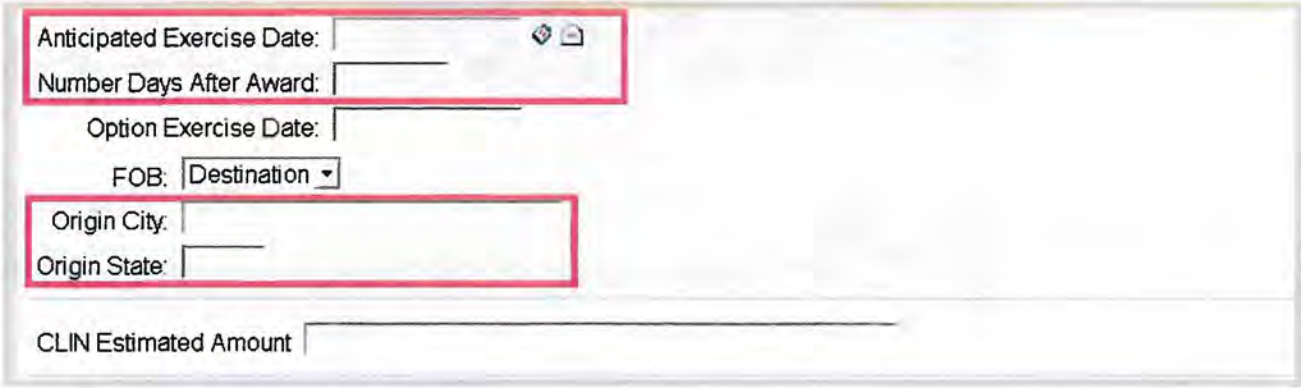


Figure 21: Items / Additional Info Screen

Steps	Section	User Action	Guidance
22. cont.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Anticipated Exercise Date:** If the Option Line Item is selected, you are required to enter the date you think you will exercise this option or enter the **Number Days After Award** you expect to exercise this option. — R/O **FOB**: Select an option, if this item has Free On Board (FOB) shipping. — O **Origin City / State:** Enter the City and State if "Origin" is selected for FOB. — R/O **CLIN Estimated Amount:** The estimated amount of the line item is copied forward from the Requisition. — O	If this is an option line item, **Option Exercise Date** will auto-populate when the option is exercised.
23.	Items / Additional Info	Click the **Ship To / Acct** link on the left-hand menu (not shown).	

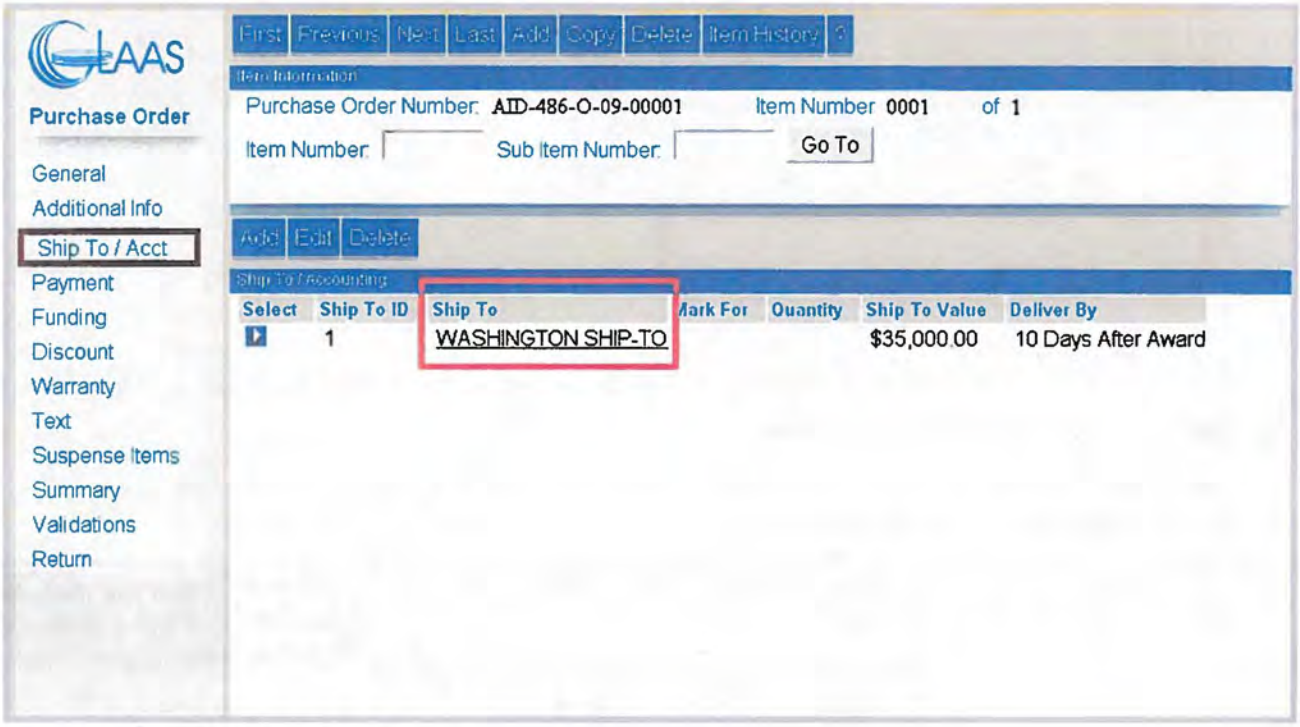


Figure 22: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
24.	Items / Ship To / Acct	Click the **Ship To** link.	

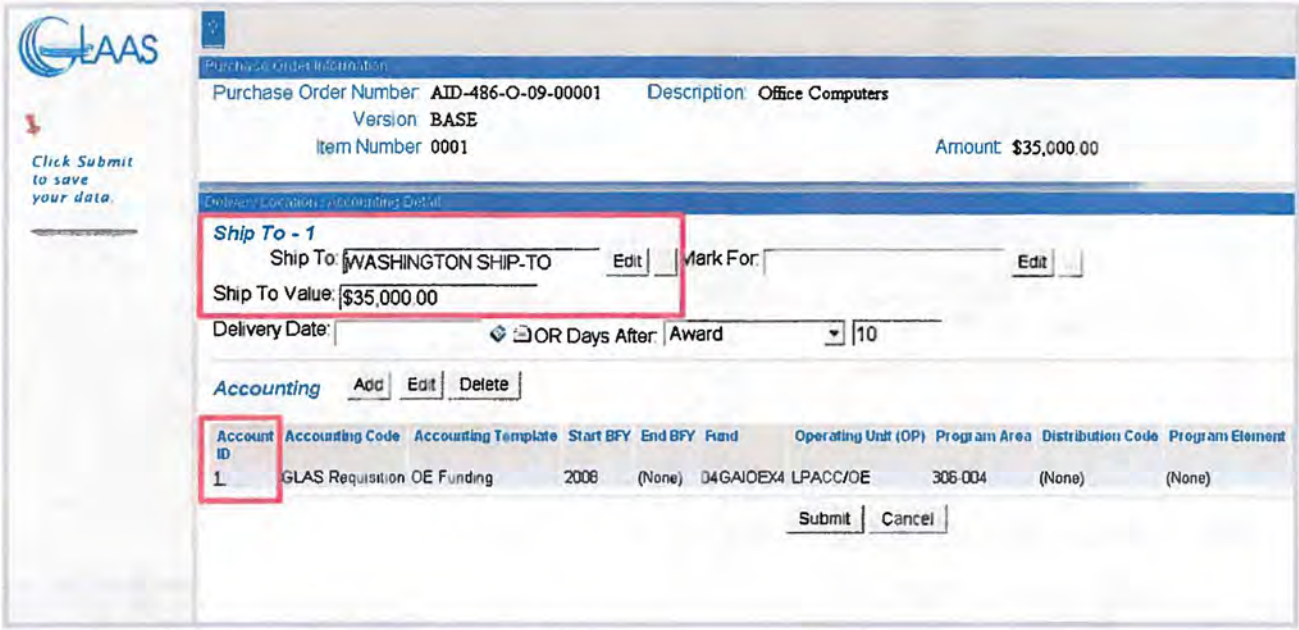


Figure 23: Delivery Location / Accounting Detail Screen

Steps	Section	User Action	Guidance
25.	Delivery Location / Accounting Detail	Complete the following Required (R) and/or Optional (O) fields: **Ship To:** Select the appropriate office or mission code. — R **Mark For:** Enter the total estimated cost for this line item. — O **Ship To Value:** Enter the total estimated cost for this item. This value should correspond to the **Amount** on the **General** screen for the line item. — R **Delivery Date or Days After Award:** Choose a delivery date, or specify delivery based on a certain number of days. — O	
26.	Delivery Location / Accounting Detail	Click the **Account ID** number link.	

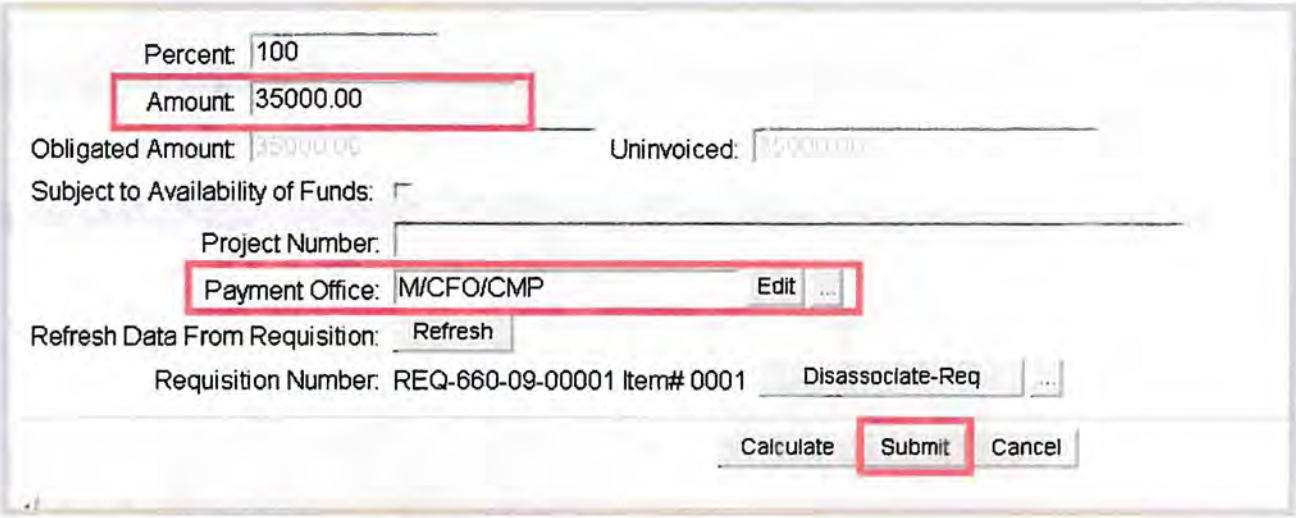


Figure 24: Accounting Information Detail Screen

Steps	Section	User Action	Guidance
27.	Accounting Information Detail	Complete the following Required (R) and/or Optional (O) fields: **Amount:** This is the committed amount from the Requisition and the amount to be obligated on the award. This should only be changed, if you are obligating a lesser amount. — R **Payment Office:** Enter the code for the office paying the invoice. — R **Refresh Data from Requisition:** Use this button to bring in updated information from the requisition, if it has been updated. — O **Disassociate-Req:** Use this button if the wrong requisition was used to create this accounting line. — O	**WARNING!** Never change the Accounting information from the Requisition. **Subject to Availability of Funds:** If this box is checked on the Requisition, the obligation for this Accounting line will be zeroed out.
28.	Accounting Information Detail	Click the **Submit** button.	
29.	Delivery Location / Accounting Detail	Click the **Submit** button (not shown).	

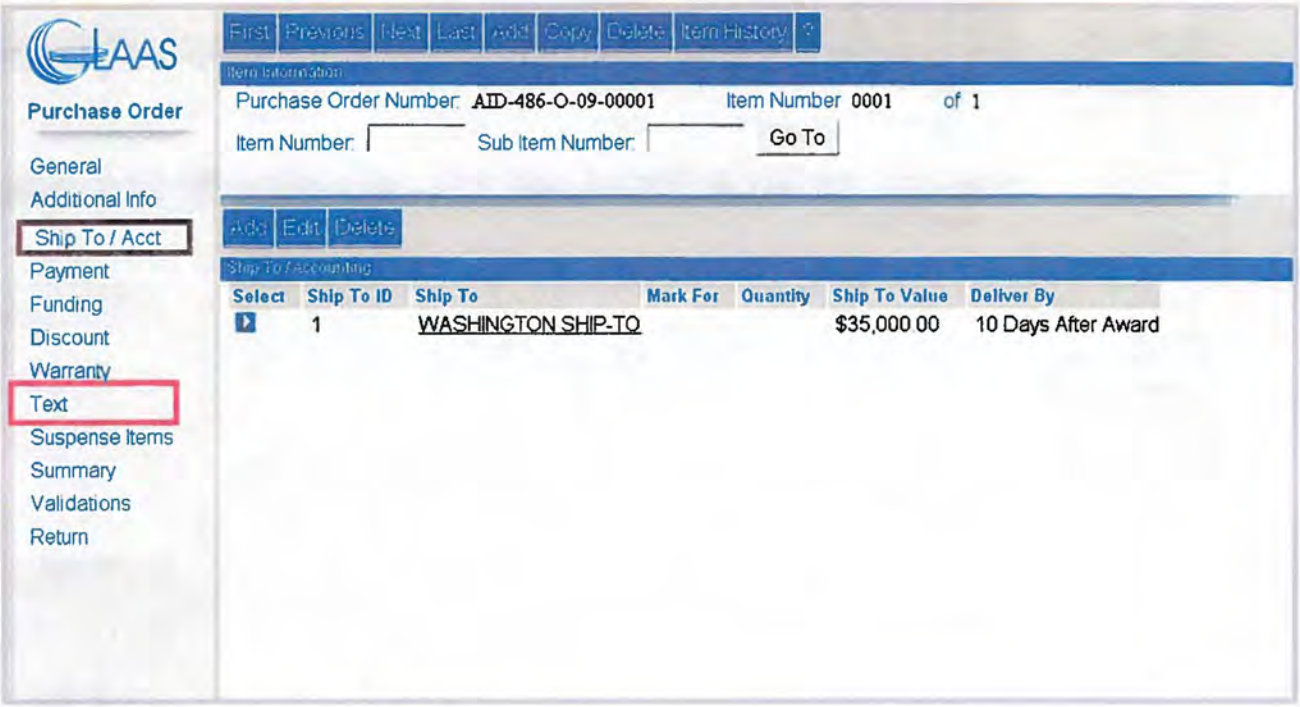


Figure 25: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
30.	Items / Ship To / Acct	Click the **Text** link on the left-hand menu.	USAID is not currently using these links on the left-hand menu: • **Payment** • **Discount** • **Warranty** Refer to the *Creating a Contract from a Requisition* user guide if this purchase order will be incrementally funded and to learn how to use the **Funding** link.

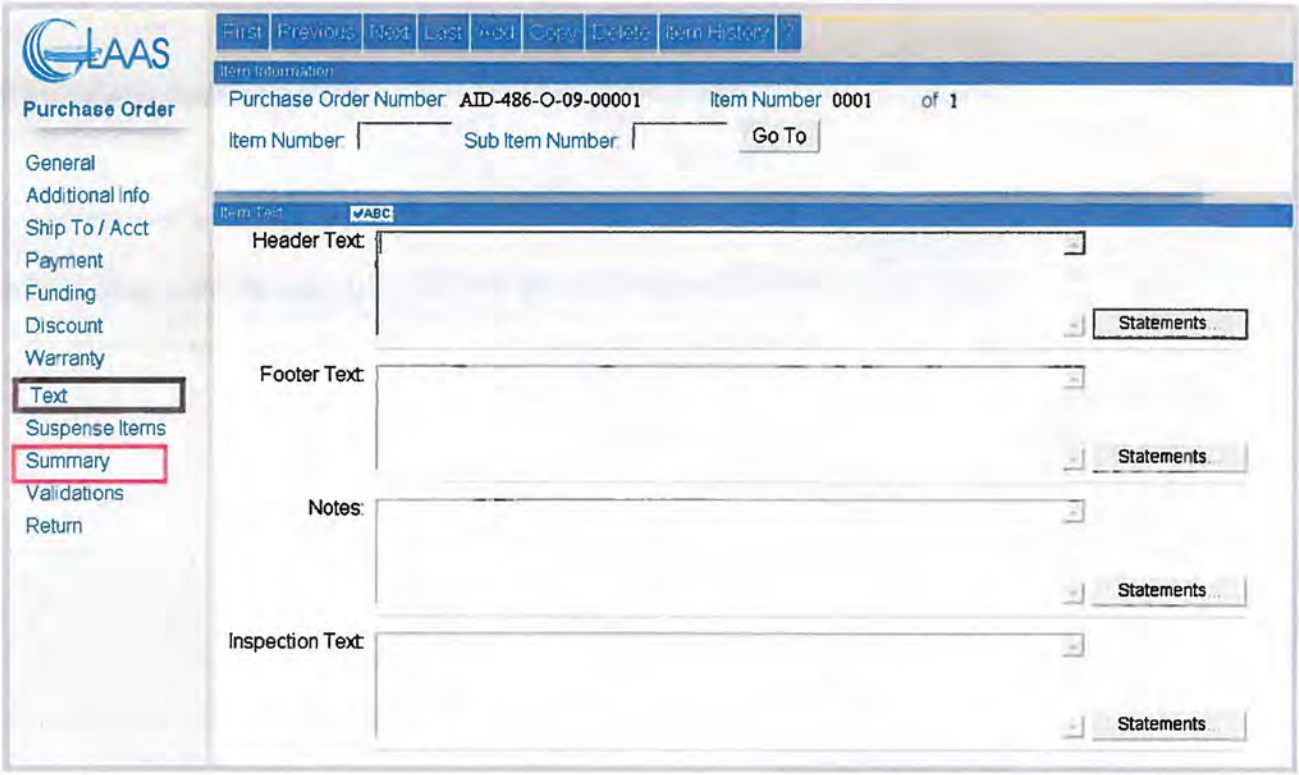


Figure 26: Items / Text Screen

Steps	Section	User Action	Guidance
31.	Items / Text	Complete the following Required (R) and/or Optional (O) fields: **Header Text:** Enter text that is only applicable to this line item. It will print out above the current item on the award. — O **Footer Text:** Enter text that is only applicable to this line item. It will print out below the current item on the award. — O **Notes:** Enter text that is for internal purposes only. It will not print on the award. — O	USAID is not currently using the **Inspection Text** field. Delete any text that should not be viewed by external audiences, such as CLIN Total Estimated Amounts.
32.	Items / Text	Click the **Summary** link on the left-hand menu.	USAID is not currently using the **Suspense Items** link.

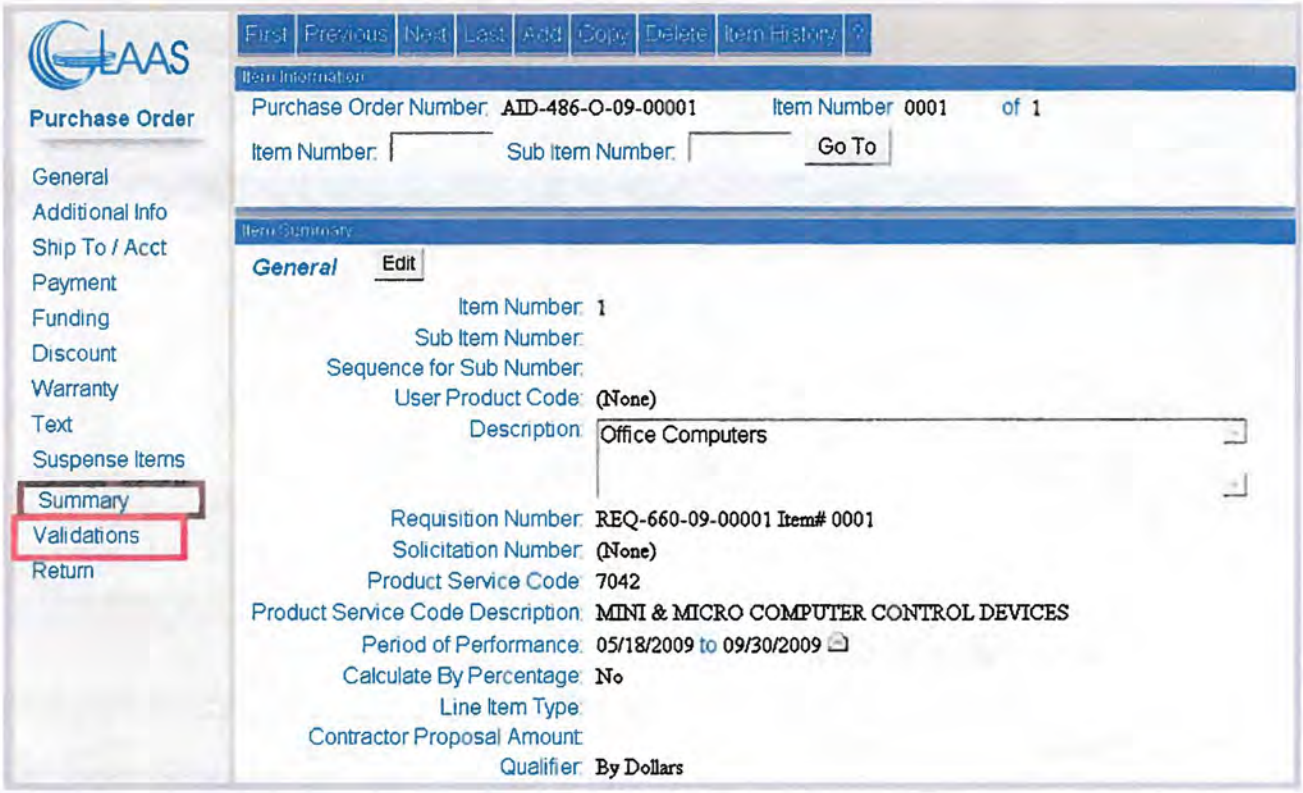


Figure 27: Items / Summary Screen

Steps	Section	User Action	Guidance
33.	Items / Summary	Review the information on this screen for accuracy.	Click the various **Edit** buttons (Edit) to make any changes.
34.	Items / Summary	Click the **Validations** link on the left-hand menu.	

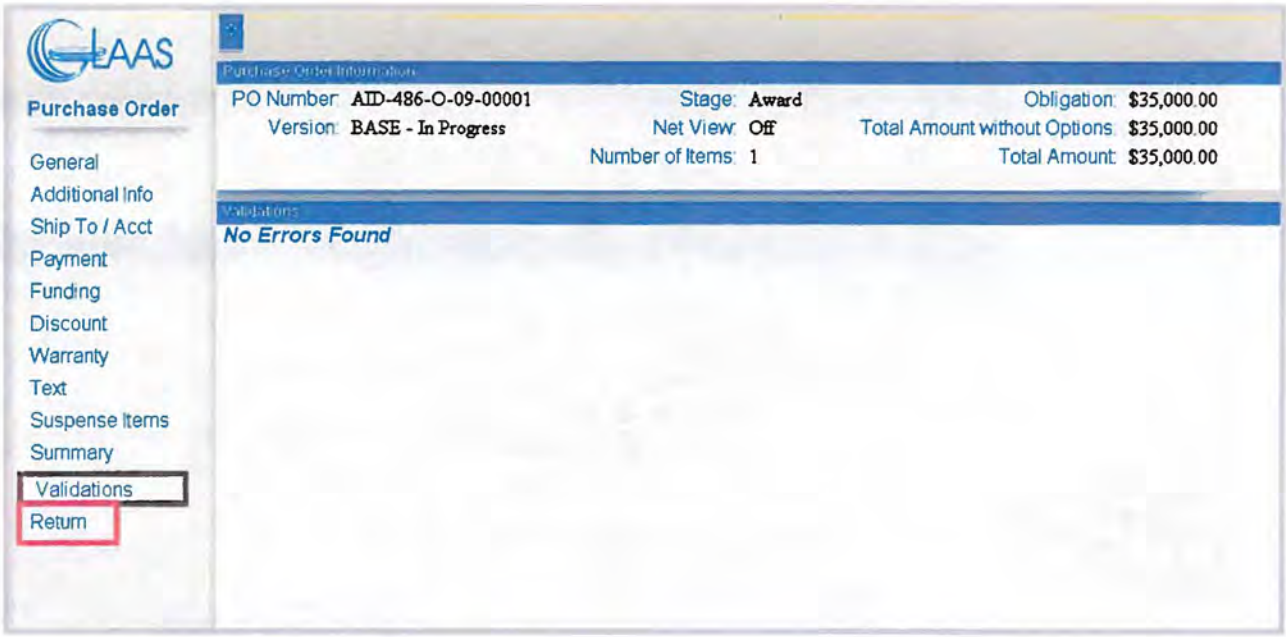


Figure 28: Items / Validations Screen

Steps	Section	User Action	Guidance
35.	Items / Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item.	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
36.	Items / Validations	Click the **Return** link on the left-hand menu.	

Figure 29: Items Screen

Steps	Section	User Action	Guidance
37.	Items	Click the **Add** toolbar button and repeat **Steps 20-36**, if you need to add additional CLINs. OR Skip to **Step 38** if not adding a new CLIN.	The system will ask you to choose how you want to add the item: • **From Requisition** • **From Solicitation** • **New** • **Duplicate Existing Contract**
38.	Items	Click the **Vendor** link on the left-hand menu.	

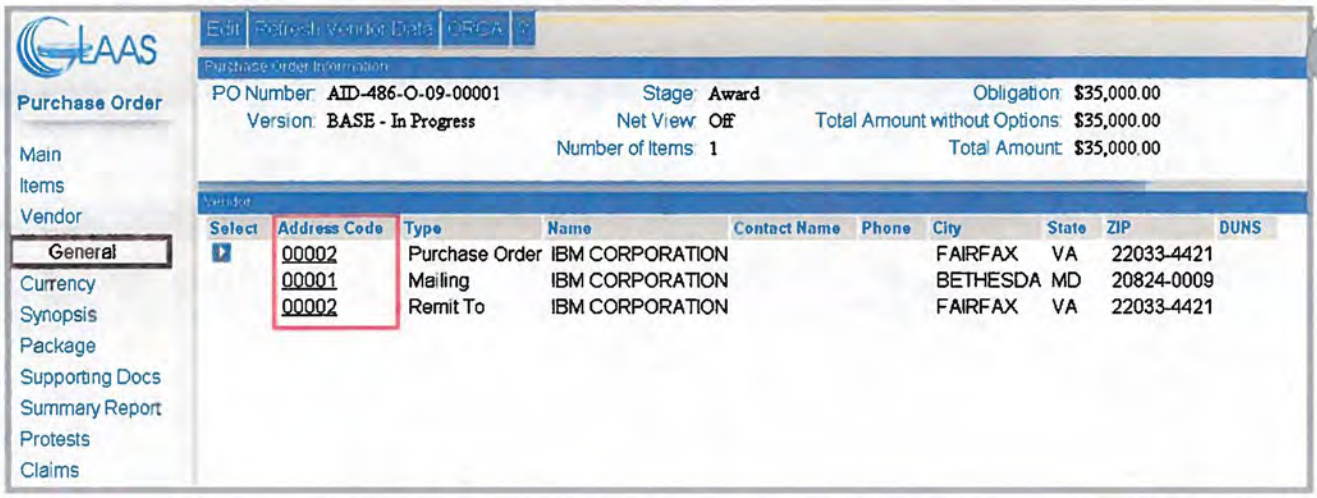


Figure 30: Vendor / General Screen

Steps	Section	User Action	Guidance
39.	Vendor / General	Click an **Address Code** link.	

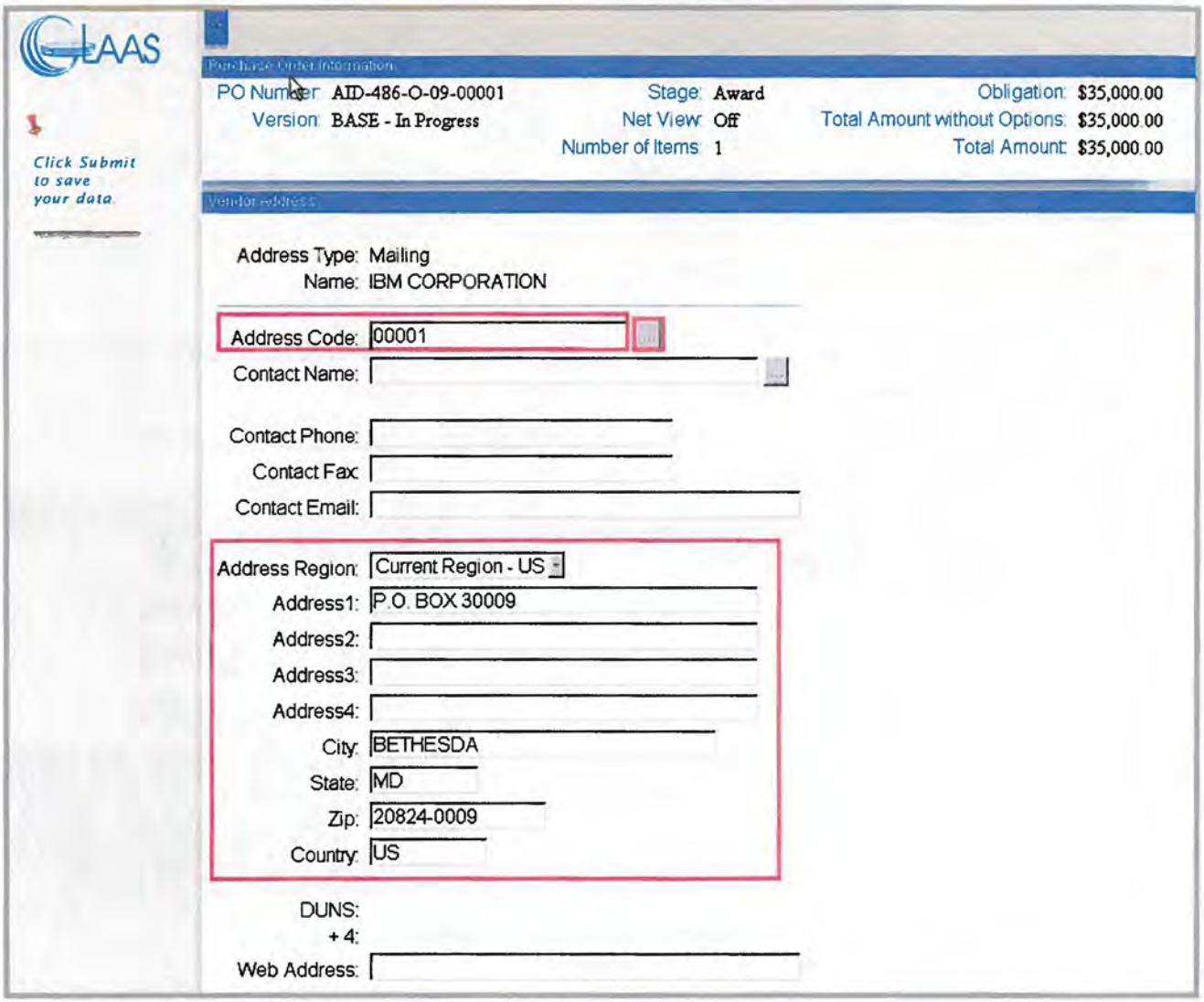


Figure 31: Vendor Address Screen

Steps	Section	User Action	Guidance
40.	Vendor Address	Verify that the **Address Code** is associated with the correct address for the vendor. Click the **Cancel** button (not shown) if this is the correct address and Address Code, and then proceed to **Step 44**.	
41.	Vendor Address	Click the lookup button ( ) next to the **Address Code** field to search for the correct Vendor Address Code.	

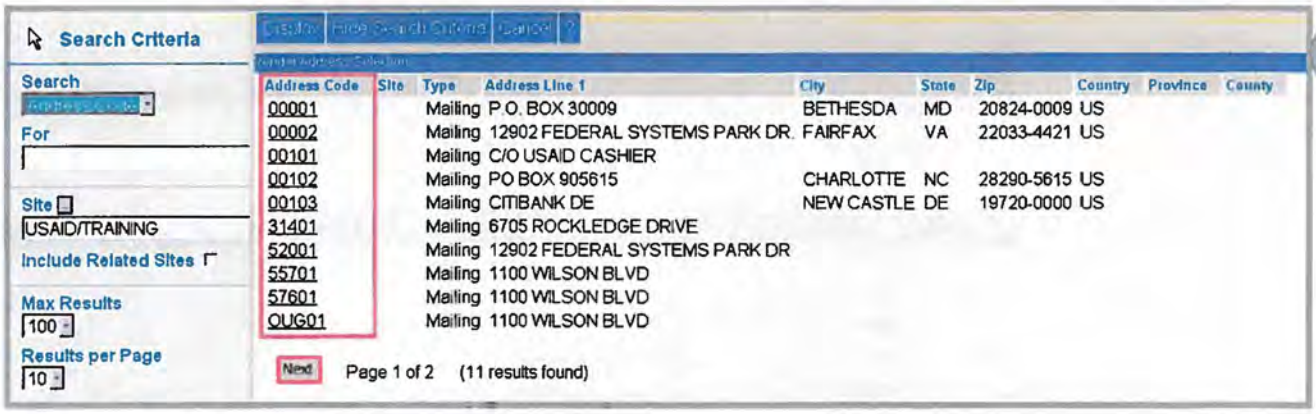


Figure 32: Vendor Address Selection Screen

Steps	Section	User Action	Guidance
42.	Vendor Address Selection	Click the correct **Address Code** link for the **Address Type**.	Phoenix vendors will have different address codes for: • Physical addresses • Bank accounts • Currency codes Select an address code beginning with "000" or "001" to pick a US Dollar vendor address. Select another appropriate address code for non-US Dollar awards.
43.	Vendor Address Selection	Click the **Submit** button to return to the **Vendor** screen (not shown).	

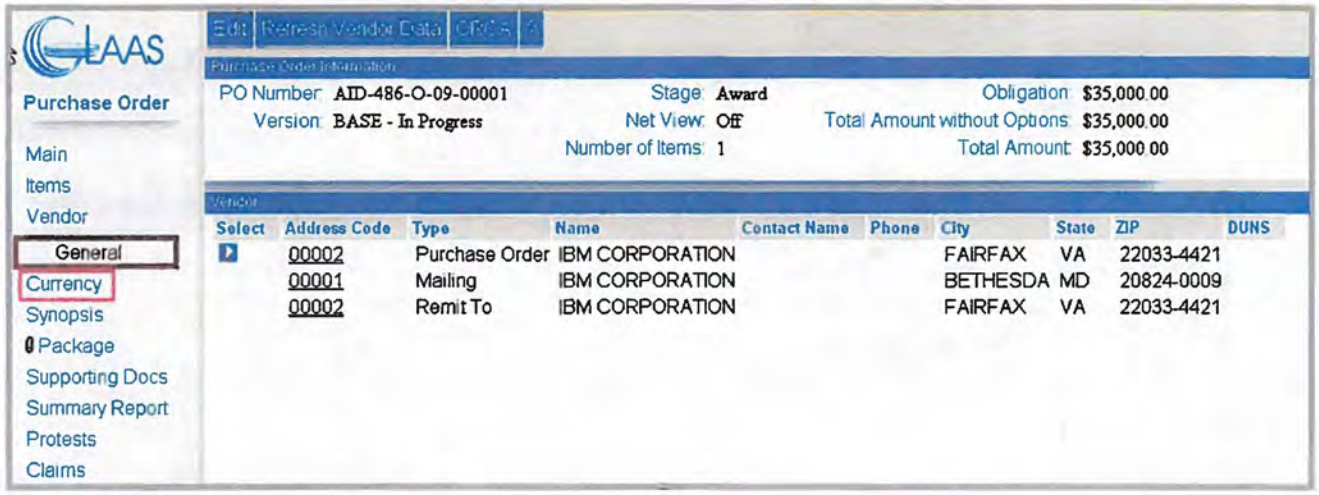


Figure 33: Vendor / General Screen

Steps	Section	User Action	Guidance
44.	Vendor / General	Click the **Currency** link on the left-hand menu.	

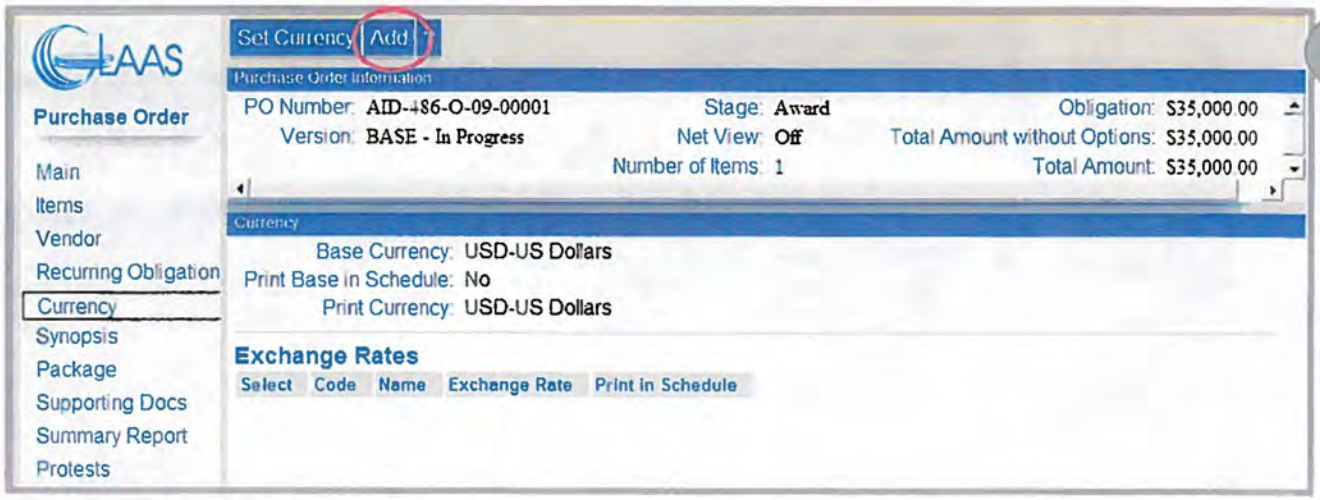


Figure 34: Currency Screen

Steps	Section	User Action	Guidance
45.	Currency	Click the **Add** toolbar button.	GLAAS documents include **Base Currency** and **Print Currency**. The Award will be printed in the **Print Currency**. This will default from the Requisition, but can be changed if needed.

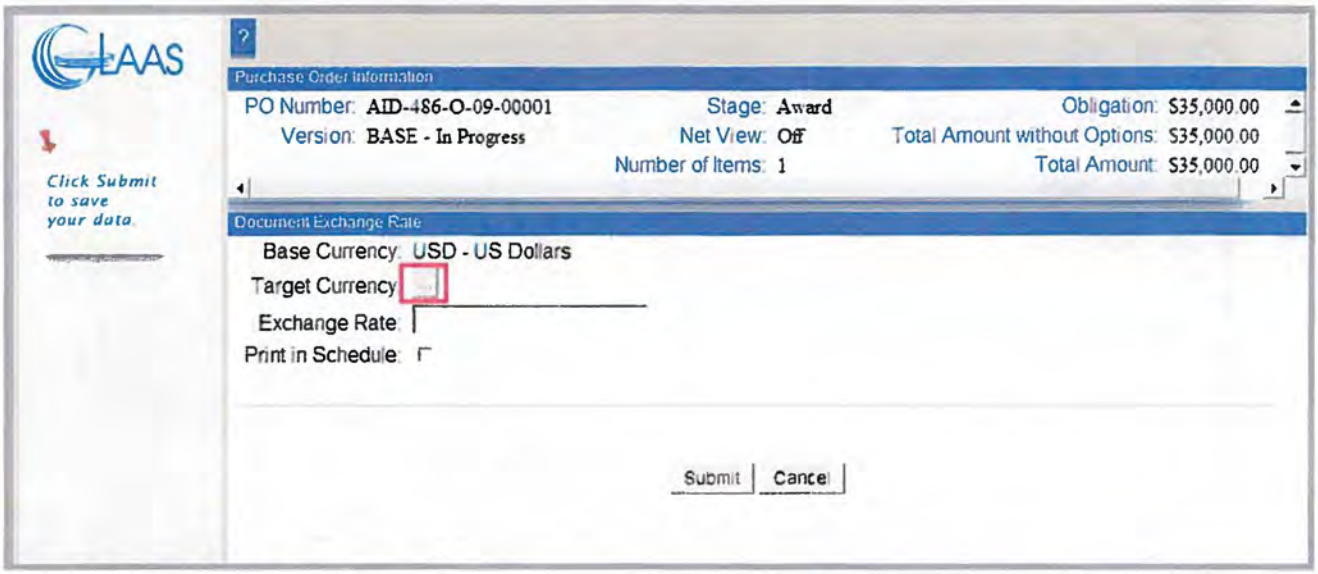


Figure 35: Document Exchange Rate Screen

Steps	Section	User Action	Guidance
46.	Document Exchange Rate	Click the lookup button ( ) next to **Target Currency** to select the currency you wish to add to this document.	

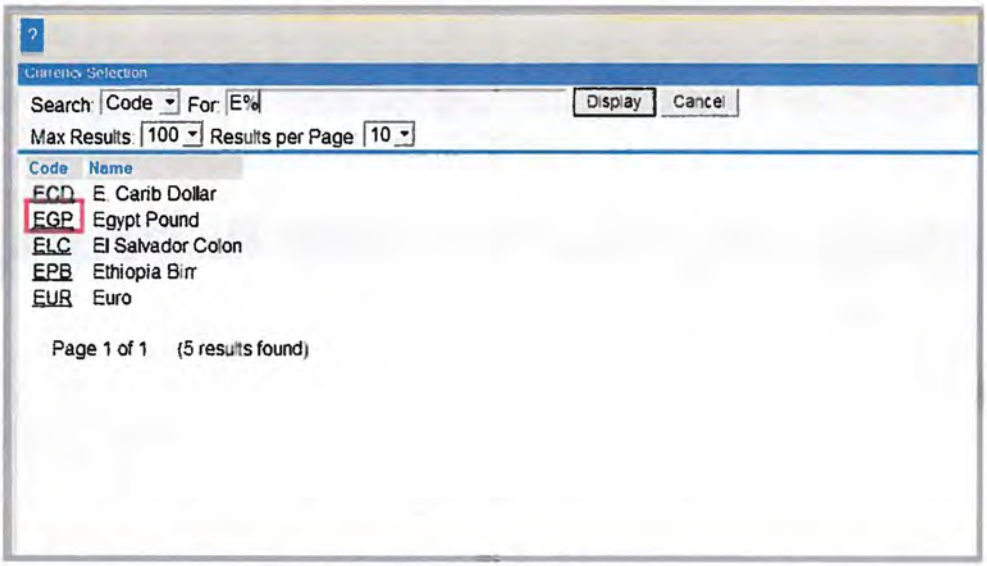


Figure 36: Currency Selection Screen

Steps	Section	User Action	Guidance
47.	Currency Selection	Search for a target currency and select the currency **Code** link.	

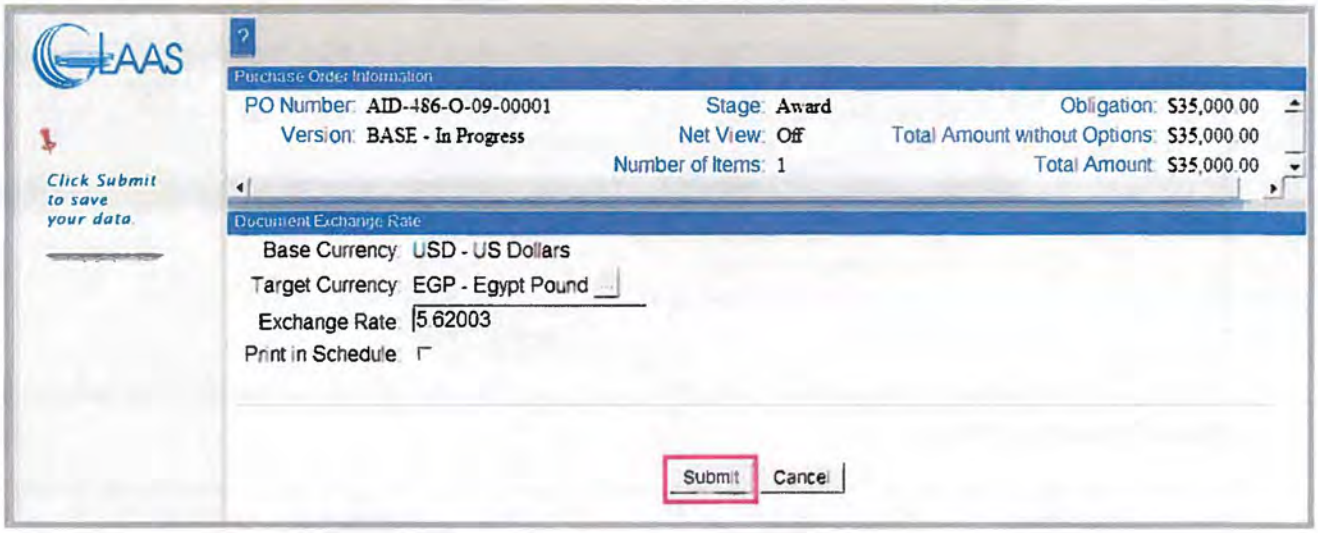


Figure 37: Document Exchange Rate Screen

Steps	Section	User Action	Guidance
48.	Document Exchange Rate	Click the **Submit** button.	

Figure 38: Currency Screen

Steps	Section	User Action	Guidance
49.	Currency	Click the **Set Currency** button.	

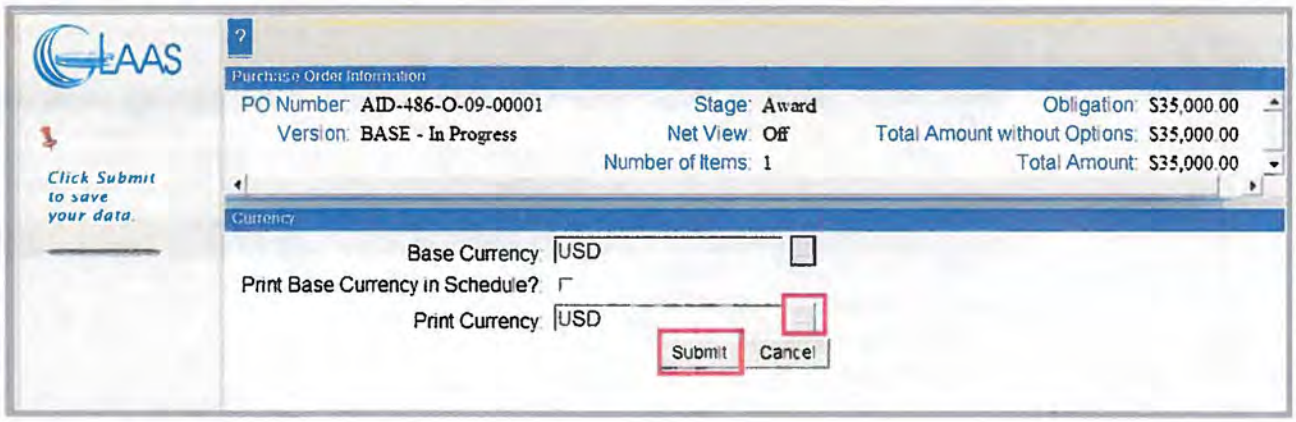


Figure 39: Currency Screen

Steps	Section	User Action	Guidance
50.	Currency	Click the lookup button ( ) next to **Print Currency**. Select the currency in which you want the Award printed. Click the **Submit** button.	**WARNING!** Do not change the **Base Currency** from the Requisition. The Requestor must amend the Requisition to de-commit the funds and create a new Requisition if this information Is not correct. USAID is not currently using the **Print Base Currency in Schedule** field.

Figure 40: Currency Screen

Steps	Section	User Action	Guidance
51.	Currency	Click the **Package** link on the left-hand menu.	If you need to synopsize this Award on FedBizOpps, refer to the *Creating a Contract from a Requisition* user guide for more information.

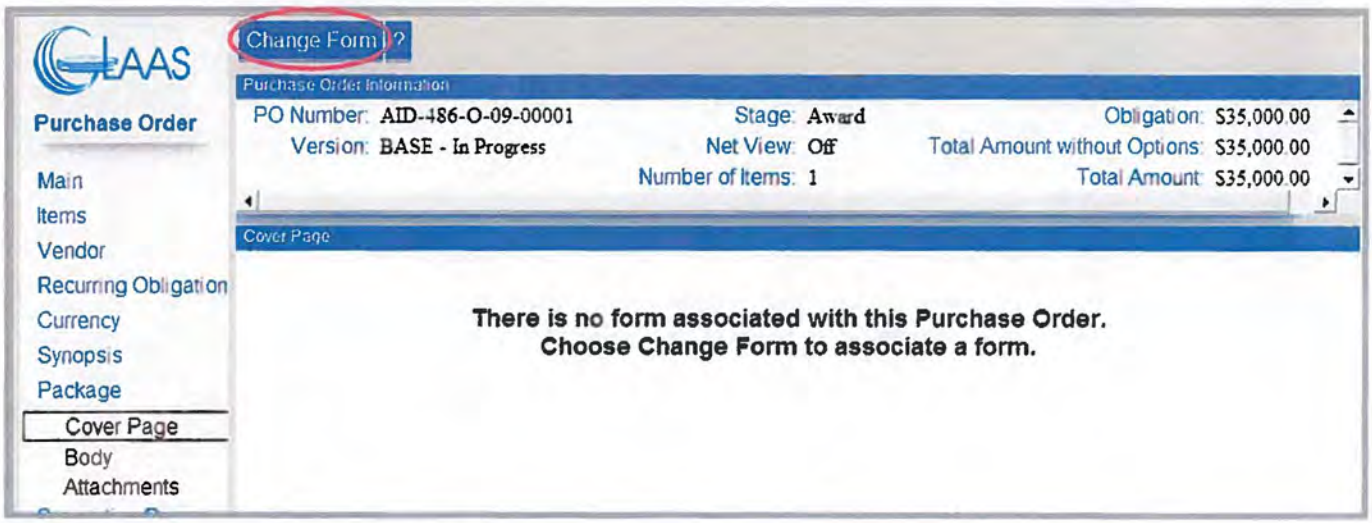


Figure 41: Package / Cover Page Screen

Steps	Section	User Action	Guidance
52.	Package / Cover Page	Click the **Change Form** toolbar button.	When you first create a Purchase Order, the **Cover Page** screen will be empty.

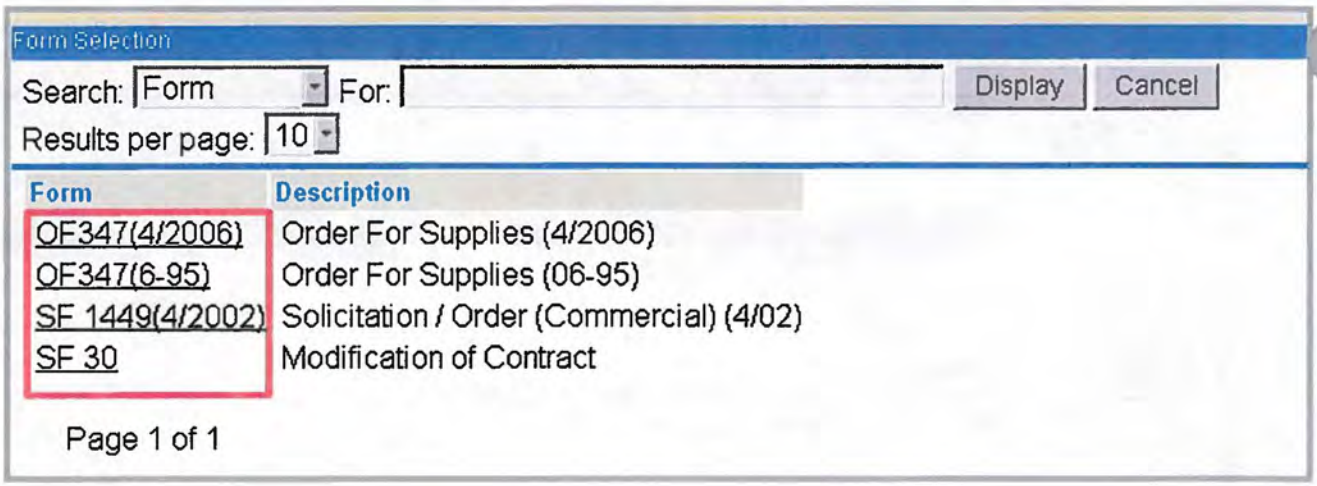


Figure 42: Form Selection Screen

Steps	Section	User Action	Guidance
53.	Form Selection	Click the **Form** link to select a Cover Page.	

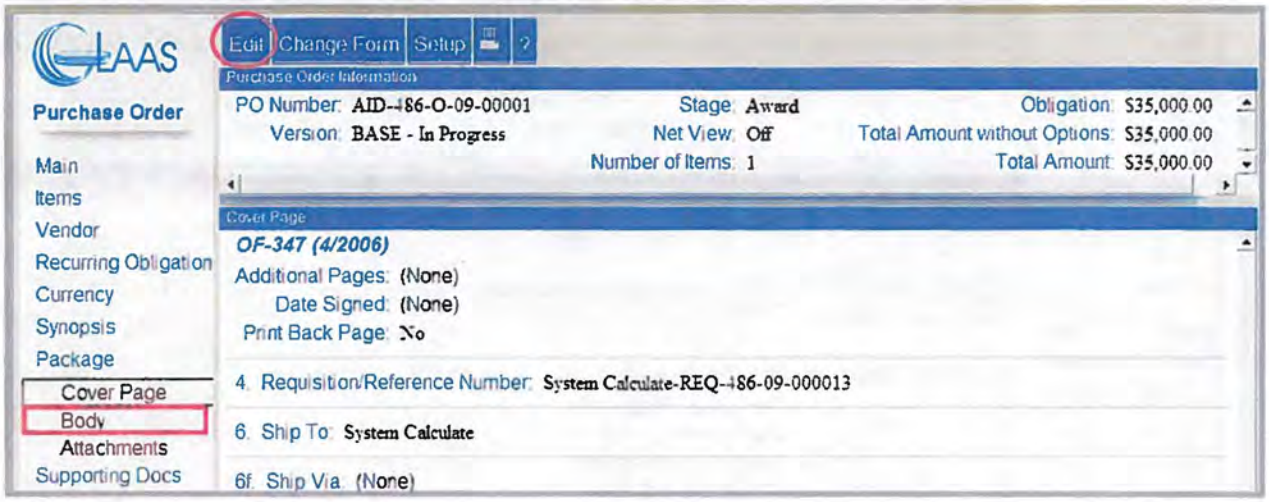


Figure 43: Package / Cover Page Screen

Steps	Section	User Action	Guidance
54.	Package/ Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the Award Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
55.	Package/ Cover Page	Click the **Body** link on the left-hand menu.	

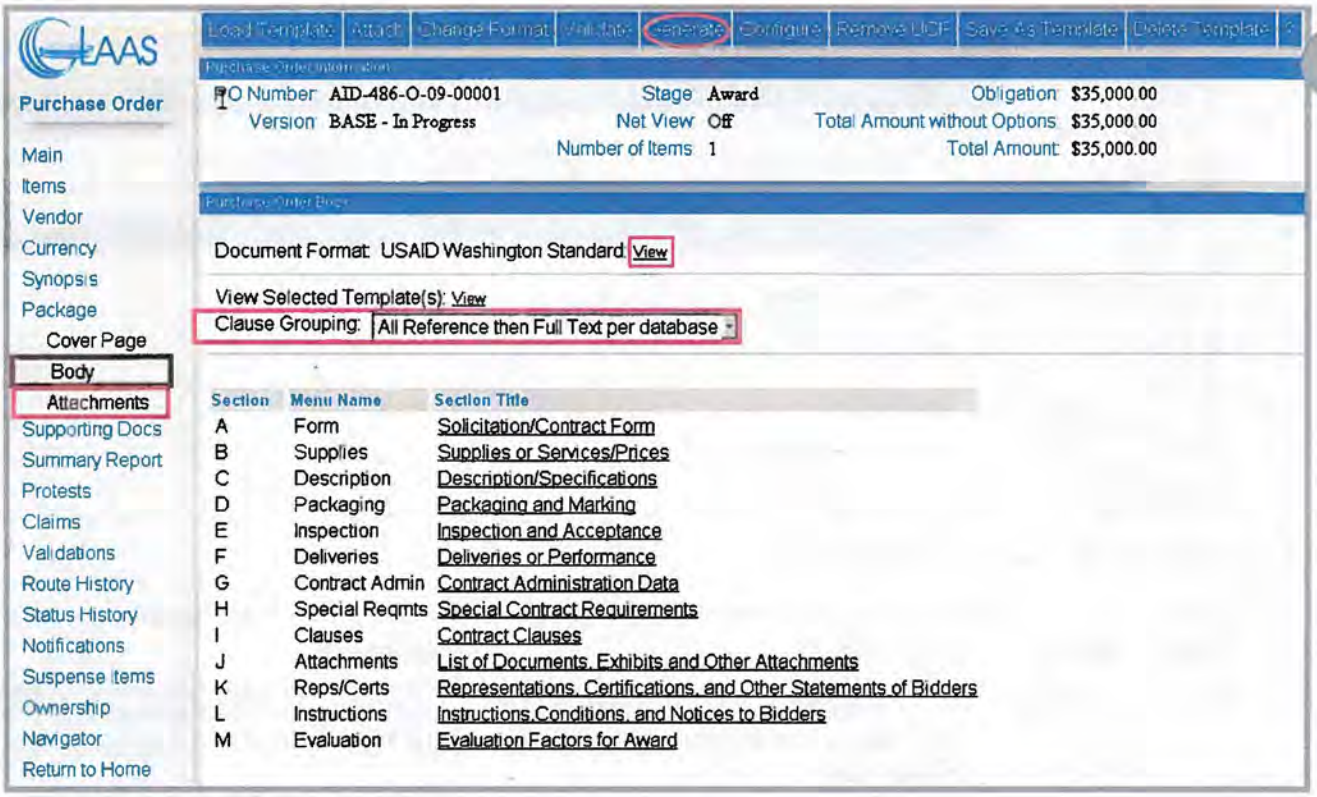


Figure 44: Package / Body Screen

Steps	Section	User Action	Guidance
56.	Package / Body	Select the appropriate **Clause Grouping** by using the dropdown list. Click the **Generate** toolbar button. Click the **View** button to view an ".rtf" (rich text format) version of the contract body (not shown). You can modify the existing body clauses by clicking the **Check Out** toolbar button to make changes outside of GLAAS, and then clicking the **Check In** toolbar to upload it back into GLAAS when you are done (not shown).	GLAAS displays the clause sections that will be included in the Award from the Clause Template. The *Working with Clauses* user guide explains how to work with GLAAS Clause Templates in more detail. Do not send .rtf documents to people outside of USAID. Convert the .rtf to a non-editable Adobe Acrobat file before sending it to a vendor or other outside party.
57.	Package / Body	Click the **Attachments** link on the left-hand menu.	

Figure 45: Package / Attachments Screen

Steps	Section	User Action	Guidance
58.	Package / Attachments	Click the **Add** or **Library** toolbar button to add an attachment to the Award package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any attachments from the Requisition will be pulled into the Award. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Once a document is added here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
59.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	

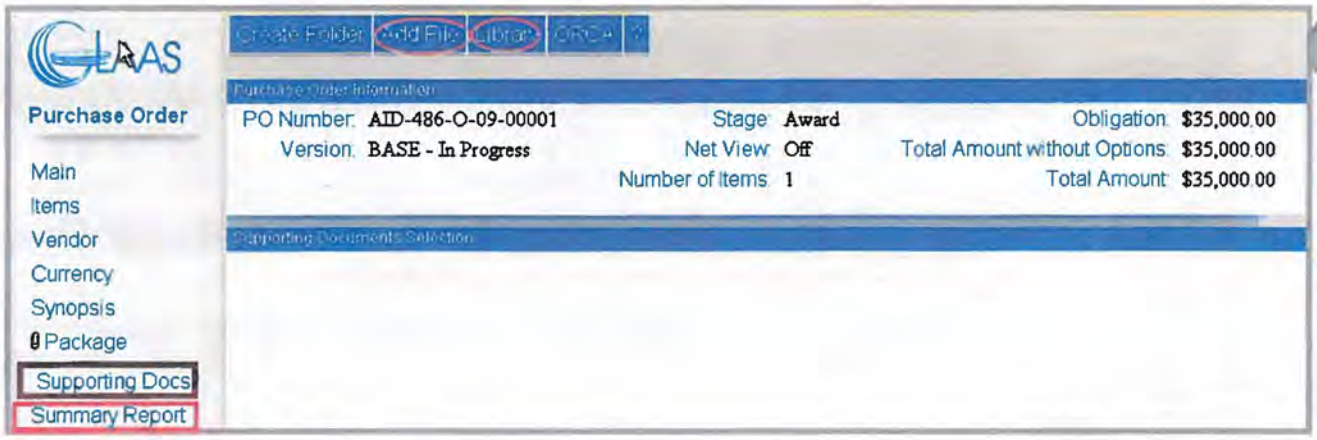


Figure 46: Supporting Docs Screen

Steps	Section	User Action	Guidance
60.	Supporting Docs	Click the **Add File** or **Library** toolbar button to add a supporting document to the Award package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any supporting documents from the Requisition will be pulled into the Award. The **Supporting Docs** screen contains documents for internal use that will not be sent to the vendor. Example: "Cost Analysis." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. To allow only users with "Full Access" to view supporting documents, click the **Detail** toolbar button and then check the **Confidential** box (not shown). Once a document is added here, you can use the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments** (not shown).
61.	Supporting Docs	Click the **Summary Report** link on the left-hand menu.	

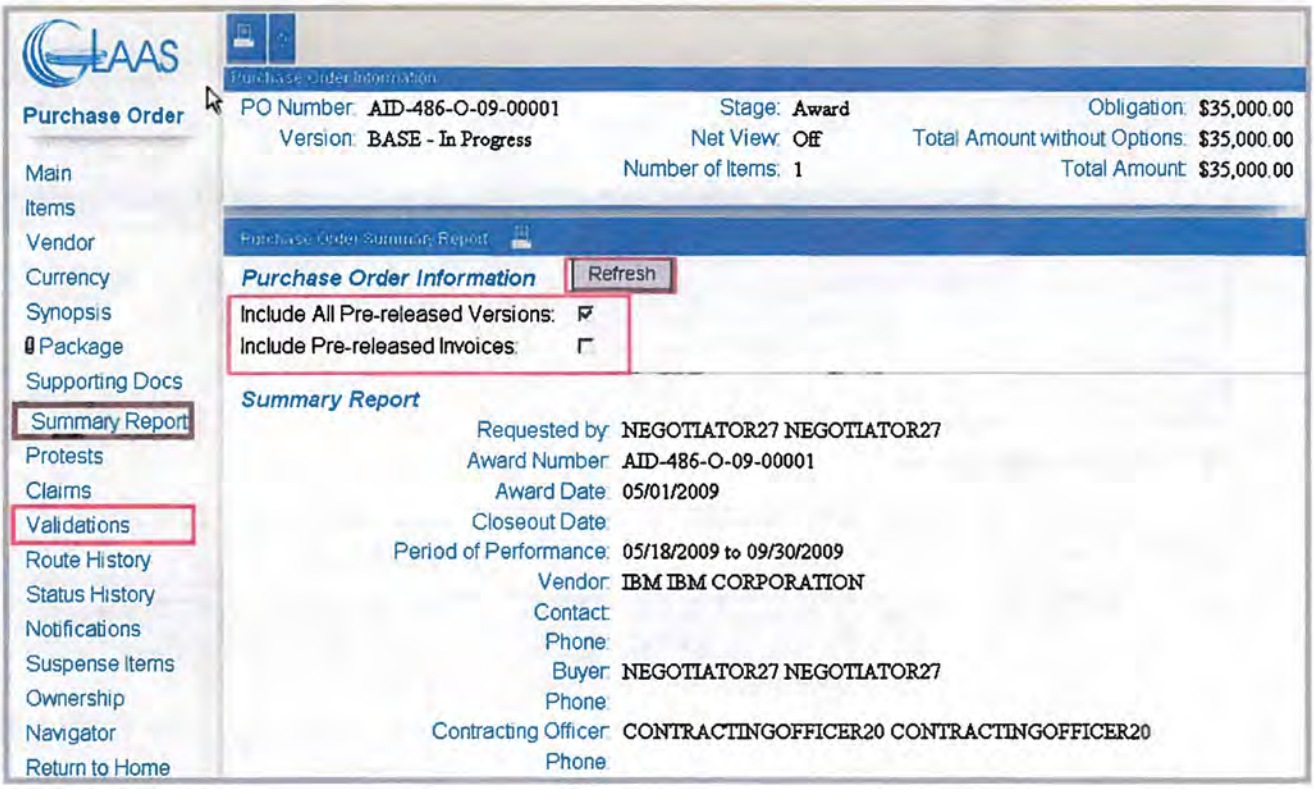


Figure 47: Summary Report Screen

Steps	Section	User Action	Guidance
62.	Summary Report	Review the Award information for accuracy.	The Purchase Order **Summary Report** screen shows a high-level summary of the GLAAS Award. If changes need to be made, use the left-hand menu to go to the section which needs to be corrected. **Pre-released Versions** means multiple versions of the Purchase Order. USAID is not currently using the **Include Pre-released Invoices** field.
63.	Summary Report	Click the **Validations** link on the left-hand menu.	The **Protests** and **Claims** links will contain any protest or claim that was recorded. Click either link to review and update existing protests and claims or you can add new protests and claims (not shown).

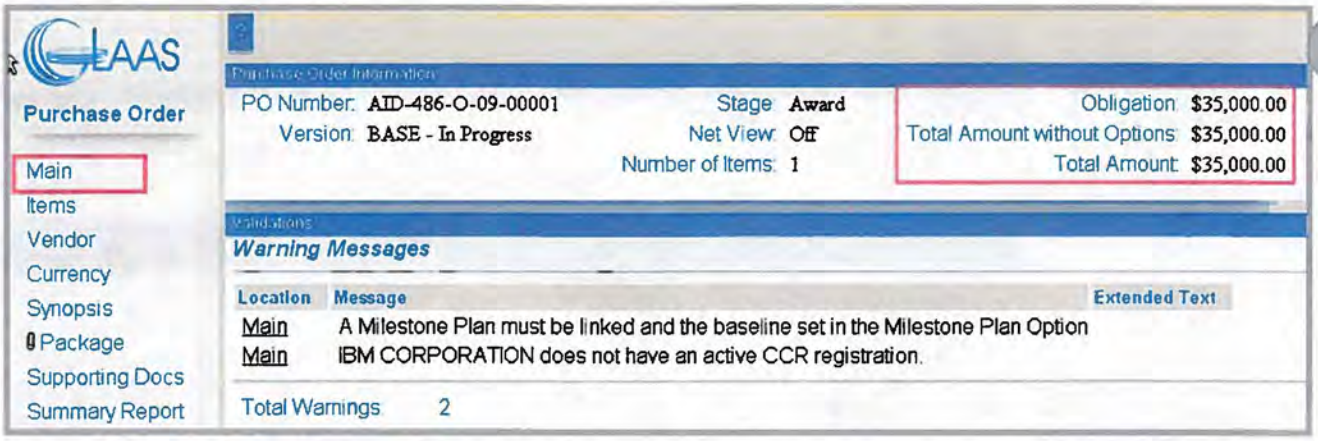


Figure 48: Validations Screen

Steps	Section	User Action	Guidance
64.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it. If there are no GLAAS errors, a popup window will appear asking for your Phoenix credentials to validate in Phoenix; enter your Phoenix User ID and Password.
65.	Validations	Click the **Main** link on the left-hand menu.	

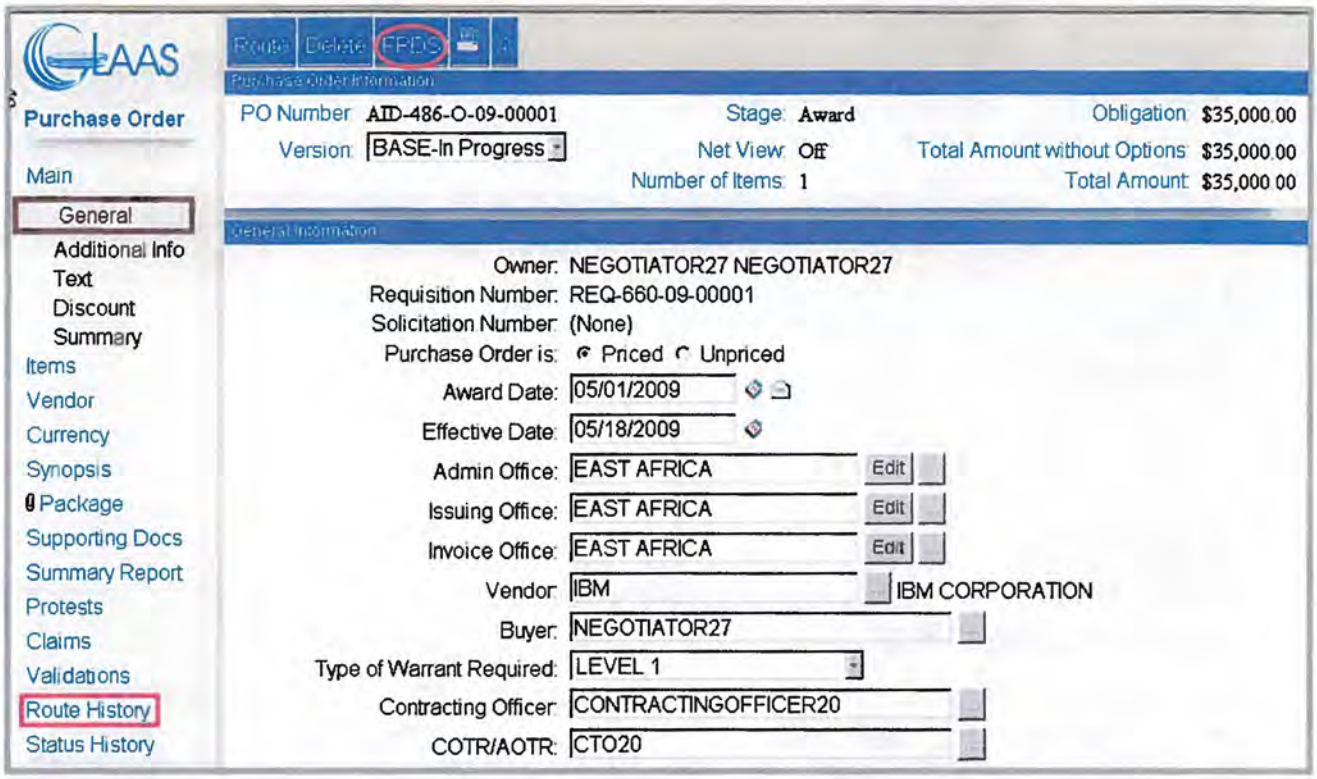


Figure 49: Main / General Screen

Steps	Section	User Action	Guidance
66.	Main / General	Click the **FPDS** toolbar button to edit the FPDS-NG record (not shown). Click the **Validate** button at the top of the FPDS-NG record window (not shown). Complete the required fields (not shown). Click the **Save** button and close the browser window (not shown).	The A&A Specialist is responsible for populating the FPDS-NG record. The Contracting Officer is responsible for approving the FPDS-NG record. The Award cannot be approved and released without a valid FPDS-NG record. Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for additional information about completing the FPDS-NG submission.
67.	Main / General	Click the **Route History** link on the left-hand menu.	

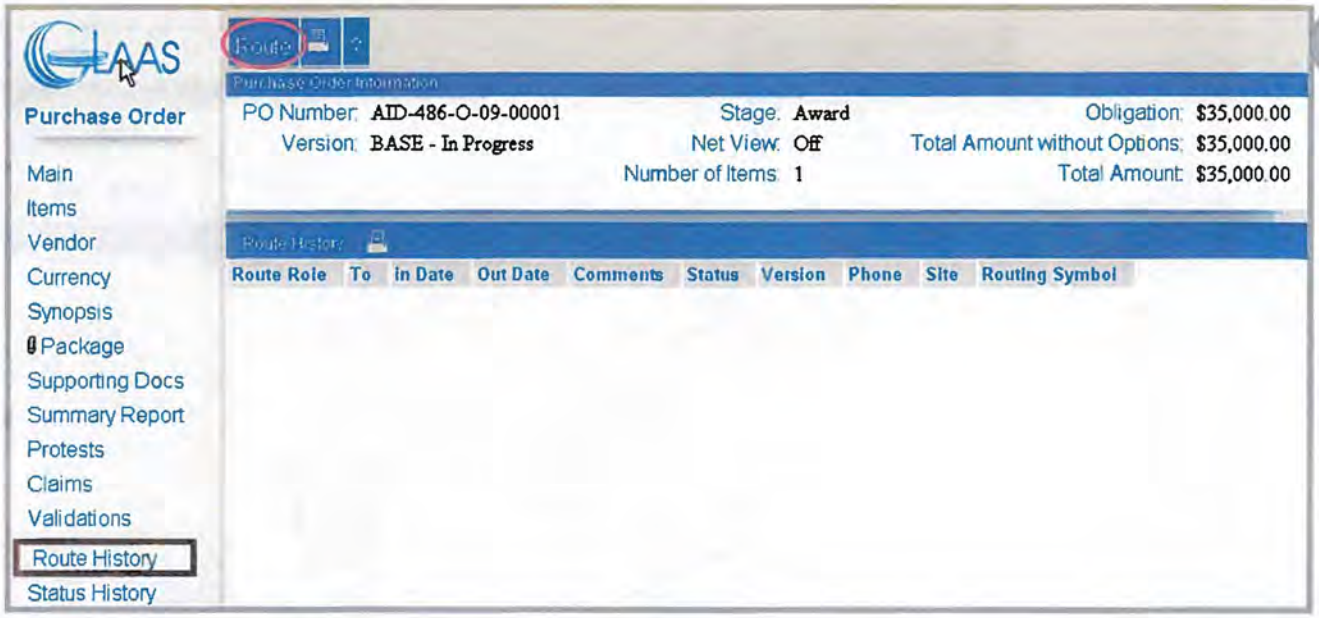


Figure 50: Route History Screen

Steps	Section	User Action	Guidance
68.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for **Approval** to the Contracting Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
69.	Route History	Click the **Return To Home** link on the left-hand menu (not shown).	Remember to return to the Milestone Plan associated to this Award and update the appropriate steps.

After the Award has been approved and released by the CO, open the Award and complete the following steps giving the Admin Office access to the Award.

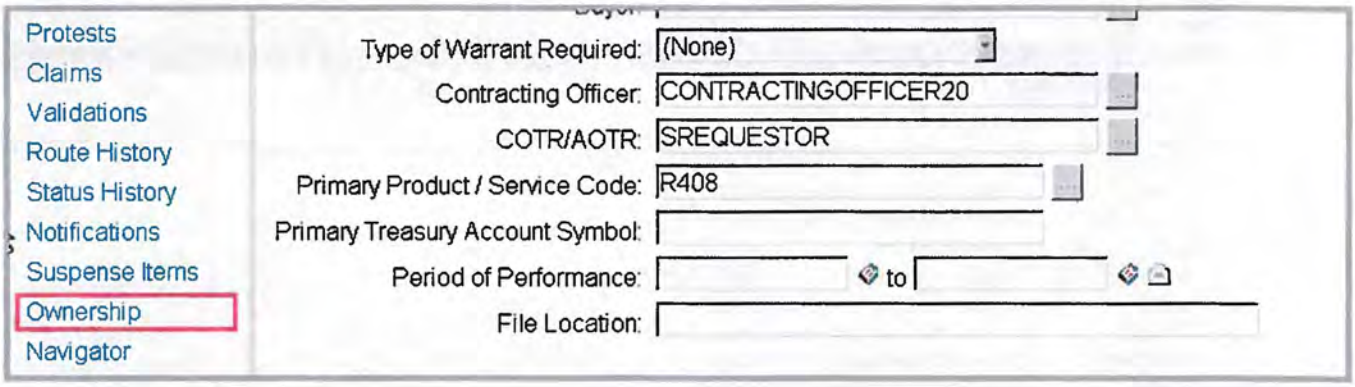


Figure 51: Main / General Screen

Steps	Section	User Action	Guidance
70.	Main / General	Click the **Ownership** link on the left-hand menu.	
71.	Share Document	Click the **Edit** toolbar button (not shown).	

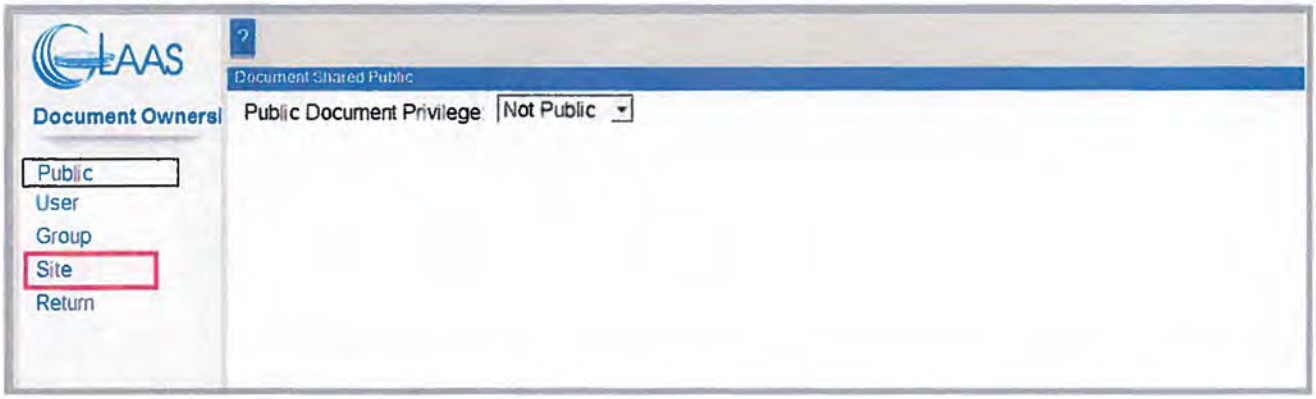


Figure 52: Document Ownership / Public Screen

Steps	Section	User Action	Guidance
72.	Document Ownership / Public	Click the **Site** link on the left-hand menu	
73.	Document Ownership / Site	Click the **Add** toolbar button (not shown).	

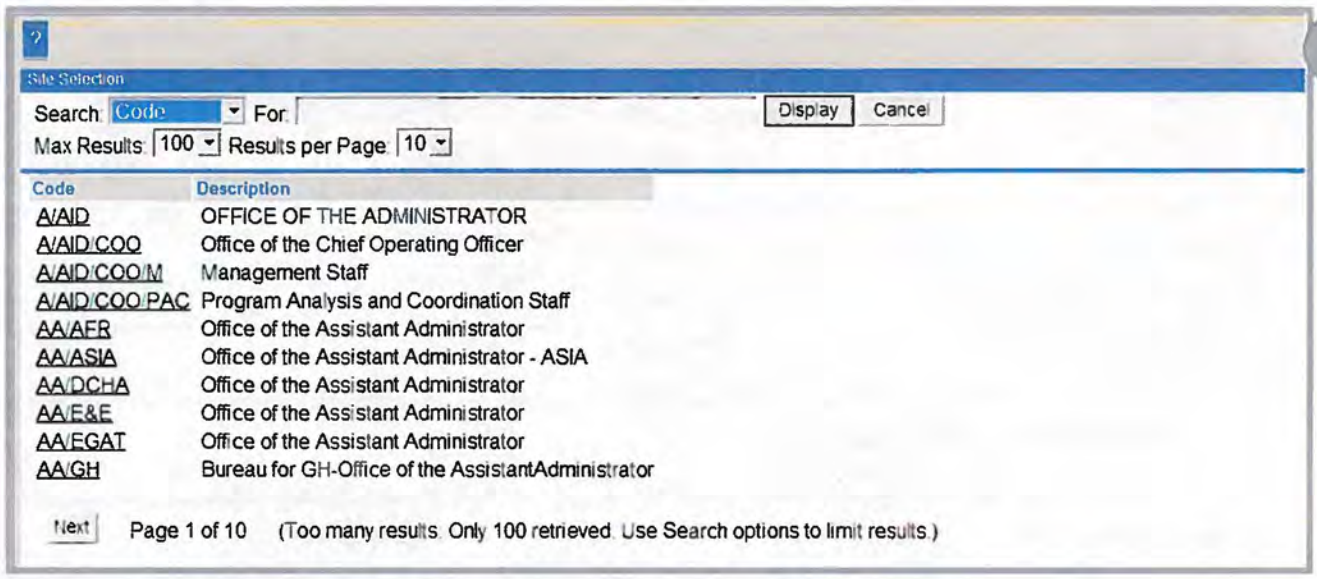


Figure 53: Site Selection Screen

Steps	Section	User Action	Guidance
74.	Site Selection	Search for and select the COTR's site.	This is the same as the **Admin Office** on the **Main / General** screen.

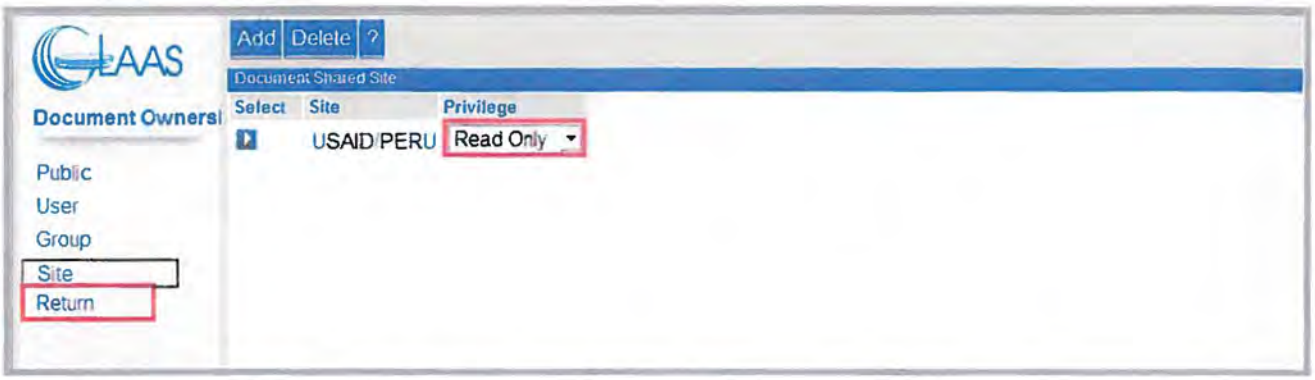


Figure 54: Document Ownership / Site Screen

Steps	Section	User Action	Guidance
75.	Document Ownership / Site	Ensure the **Privilege** is Read Only.	This will allow the **Admin Office** to view the released award, and access it to create modifications and BPA Calls.
76.	Document Ownership / Site	Click the **Return** link on the left-hand menu.	
77.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

USAID
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GLAAS:
My Profile & GLAAS Inbox

November 2009

My Profile and GLAAS Inbox Objectives

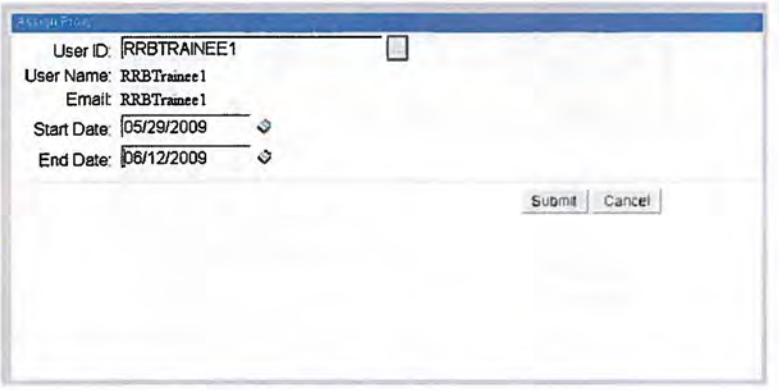
- At the end of this topic, you will know how to:
  - Set defaults
  - Set up a Proxy

My Profile

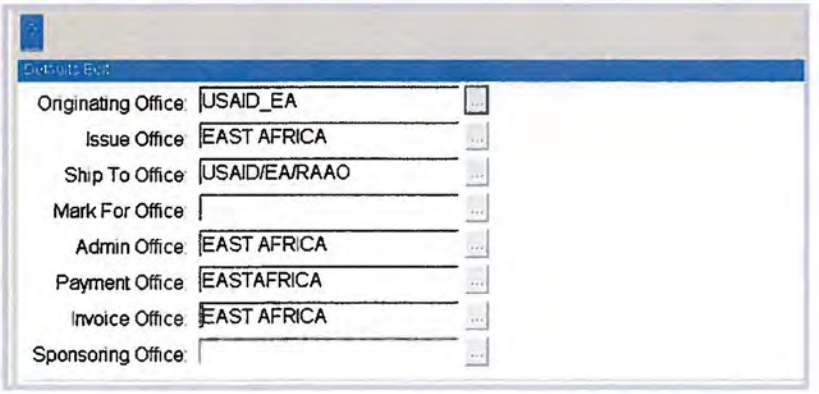
- You can set your GLAAS defaults for common fields, including:
  - Email notification options
  - Proxy
  - Office Code Defaults

My Profile: Email Notifications

My Profile: Proxy



My Profile: Office Code Defaults



The GLAAS Inbox

Inbox

- For Approval
- For Review
- Courtesy Copy
- Approved
- Disapproved
- Reviewed
- Proxied
- Completed
- Notifications
- Task List
- Buyer Workload
- Bypassed
- Return To Home

These folders contain documents sent to you

These folders contain documents you or others have already acted on

These folders contain other key items, such as notifications, tasks and other useful reminders

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GLAAS 102: Creating a Contract

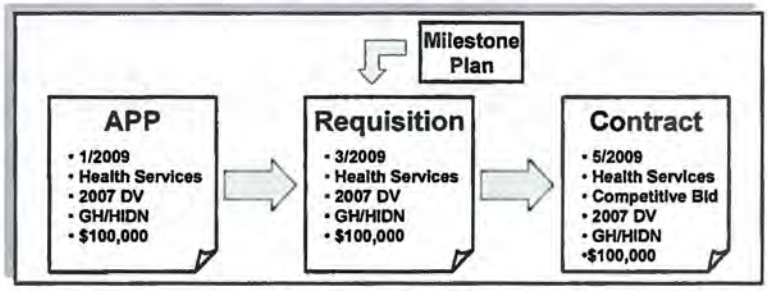
December 2009

Creating a Contract Objectives

- At the end of this topic, you will know how to:
  - Create both non-competitive and competitive contracts
  - Create a Personal Service Contract (PSC)
  - Add contract clauses and generate the award package
  - Route the contract
  - Post the Award Notice to FedBizOpps

Creating a Non-Competitive Contract

1. An APP is created to plan the procurement
2. The Requisition is created and associated to an APP
3. The Requisition is released and funds are committed in Phoenix
4. The Milestone Plan is created and linked to a Requisition
5. The Contract is created from the Requisition



Creating a Competitive Contract

1. An APP is created to plan the procurement
2. The Requisition is created and associated to an APP
3. The Requisition is released and funds are committed in Phoenix
4. The Milestone Plan is created and linked to a Requisition
5. The Solicitation is created from the Requisition
6. The Contract is created from the Solicitation

Creating a Contract Roles & Responsibilities

For non-competitive contracts:

- The A&A Specialist –
  - Creates the contract from a requisition
  - Generates the award package
  - Updates FedBizOpps to announce the award notice through GLAAS
  - Posts the award to FPDS-NG from GLAAS
- The Contracting Officer –
  - Approves the contract to initiate the obligation in Phoenix
  - Finalizes the FPDS-NG record

Creating a Contract Roles & Responsibilities (cont)

For competitive contracts:

- The A&A Specialist –
  - Creates the solicitation from a requisition
  - Creates the contract from a solicitation
  - Generates the award package
  - Updates FedBizOpps to announce the award notice through GLAAS
  - Posts the award to FPDS-NG from GLAAS
- The Contracting Officer –
  - Approves the contract to initiate the obligation in Phoenix
  - Finalizes the FPDS-NG record

Award Instrument Types

Code	Instrument Type	Document Type
B	Basic Ordering Agreement	Contract
C	Contract	Contract
D	Definitive Quantity Agreement	Contract
I	Indefinite Quantity Agreement	Contract
S	Personal Services Contract	Contract
Q	Requirements Contract	Contract
Z	Ribbon Contract (Buy-In)	Contract
BC	Blanket Purchase Agreement Call	BPA Call
E	Blanket Purchase Agreement Setup	BPA Setup
W	DO Against USAID IQC	Delivery Order
M	GSA Schedule Order	Delivery Order
N	Other Federal Schedule Order	Delivery Order

Award Instrument Types (cont)

Code	Instrument Type	Document Type
T	Participating Agency Program (PAPA)	IAA
P	Participating Agency Service Program (PASA)	IAA
R	Resource Support Services	IAA
X	Ribbon PASA	IAA
V	Purchase Card Order	Purchase Card Order/Purchase Order
O	Purchase Order	Purchase Order
A	Cooperative Agreement	Grant
G	Grant	Grant
LA	Leader with Associate Award	Grant
L	Associate Award	Grant

SOL-OAA-09-000040

Creating a Personal Services Contract (PSC)

- Creating a PSC is like creating a regular contract except you:
  - Use a different numbering mask
  - Include specific PSC clauses from the database with all of the FAR, AIDAR and AAPD/CIB/ADS language you need for a PSC
  - Pick a standard GLAAS cover page and load a PSC form from the Library as an attachment

Sensitive Vendors in FPDS-NG

- Sensitive vendors, such as PSCs, must be assigned one of three DUNS numbers:
  - Domestic contractor = DUNS 790238638
  - Foreign contractor = DUNS 790238851
  - Miscellaneous foreign contractor = DUNS 123456787

Protecting Vendors in FPDS-NG

- GLAAS transfers the vendor DUNS number to FPDS-NG
- The Contractor Name from Contract field in FPDS-NG will be empty
- In FPDS-NG, click the lookup button next to the Contractor Name from Contract field and select the contractor name associated to the DUNS number

GLAAS 102 USER GUIDE:

CREATING A CONTRACT FROM A REQUISITION

PURPOSE:

This user guide will show you how to create a Contract from a Requisition. This functionality is used when creating a Contract from a Requisition or a Contract where the Solicitation was not created in GLAAS.

BEFORE STARTING:

1. A Milestone Plan has been created, linked to a Requisition, and baselined.
2. A Requisition has been assigned to you in your Buyer Workload with the status of "Released."
3. In order to create a Contract, you must be an A&A Specialist or a Contracting Officer.
4. In order to approve a Contract, you must be a Contracting Officer.

STEPS:

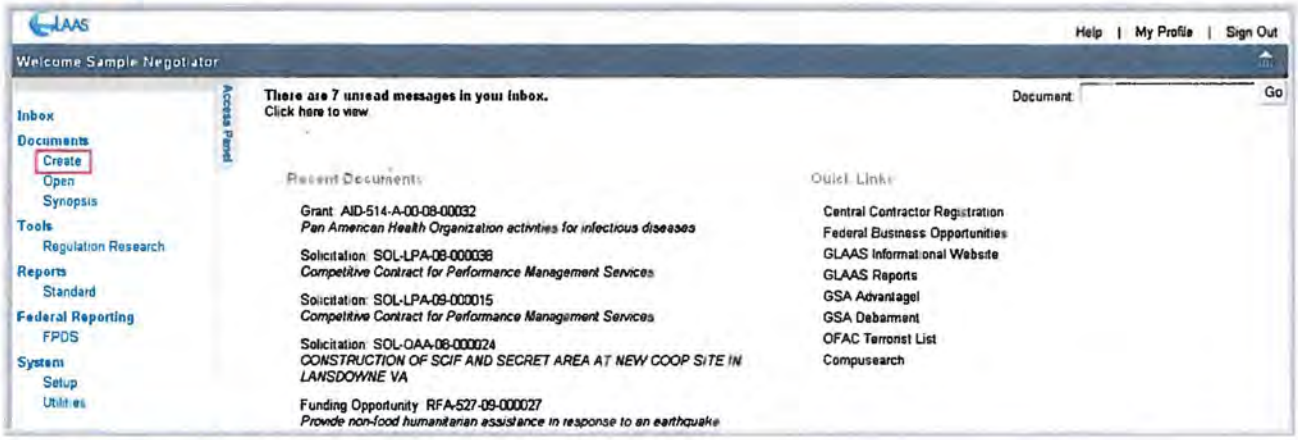


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

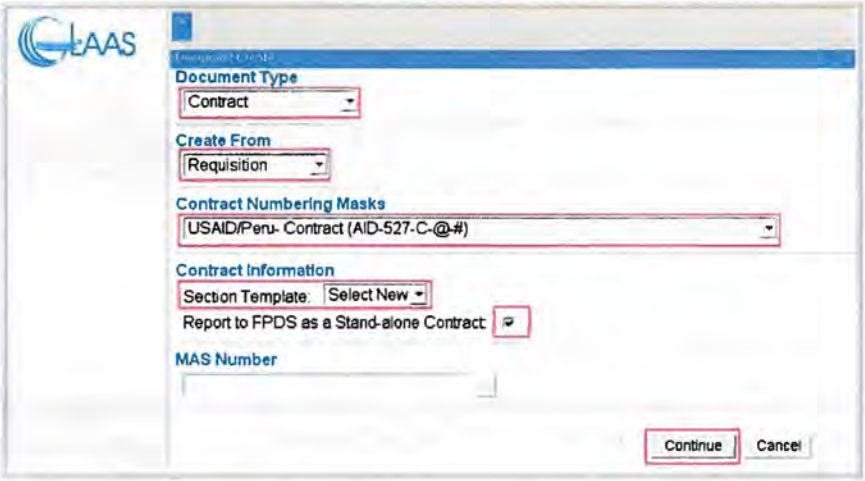


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Contract." • **Create From:** Select "Requisition." • **Contract Numbering Mask**: Select a numbering mask. • **Section Template**: Select "Select New" to load a clause template now or select "None" to add a template later. • **Report to FPDS as a Stand-alone Contract**: Check the box if you do not wish to issue Delivery/Task Orders against this Contract.	GLAAS uses different instrument codes for different types of contracts: • "B" = Basic Ordering Agreement • "C" = Contract • "D" = Definite Quantity Contract • "I" = Indefinite Quantity Contract • "Q" = Requirements Contract • "S" = Personal Services Contract • "Z" = Ribbon Contract (Buy-In) For instrument codes "S" and "C" you must check the **Report to FPDS as a Stand-alone Contract** box. All awards over $3,000 must be reported to the Federal Procurement Data System-Next Generation (FPDS-NG). Refer to the *Creating a Contract from a GLAAS Solicitation* user guide if you are creating a competitive contract from a Solicitation. Refer to the *Creating a Personal Service Contract (PSC)* user guide if you are creating a PSC.
4.	Document Create	Click the **Continue** button.	

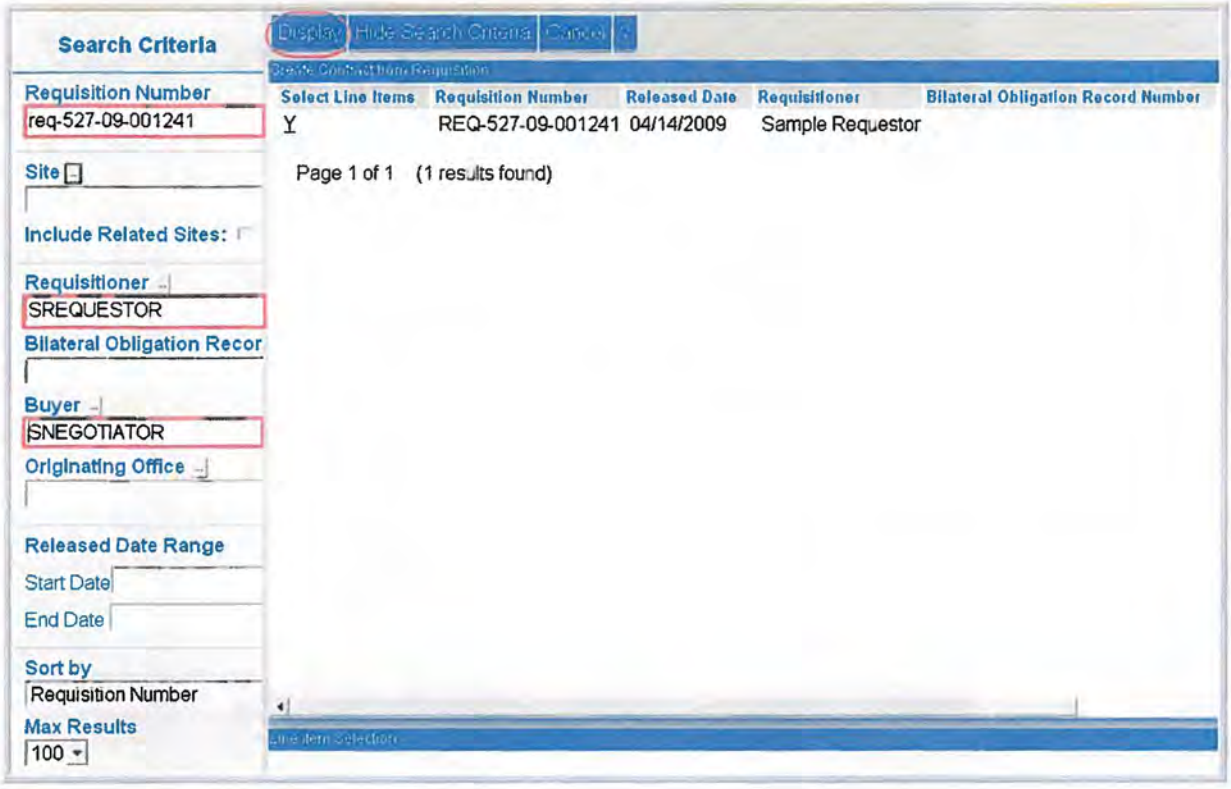


Figure 3: Create Contract from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Contract from Requisition	Clear the **Site** field and search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor.

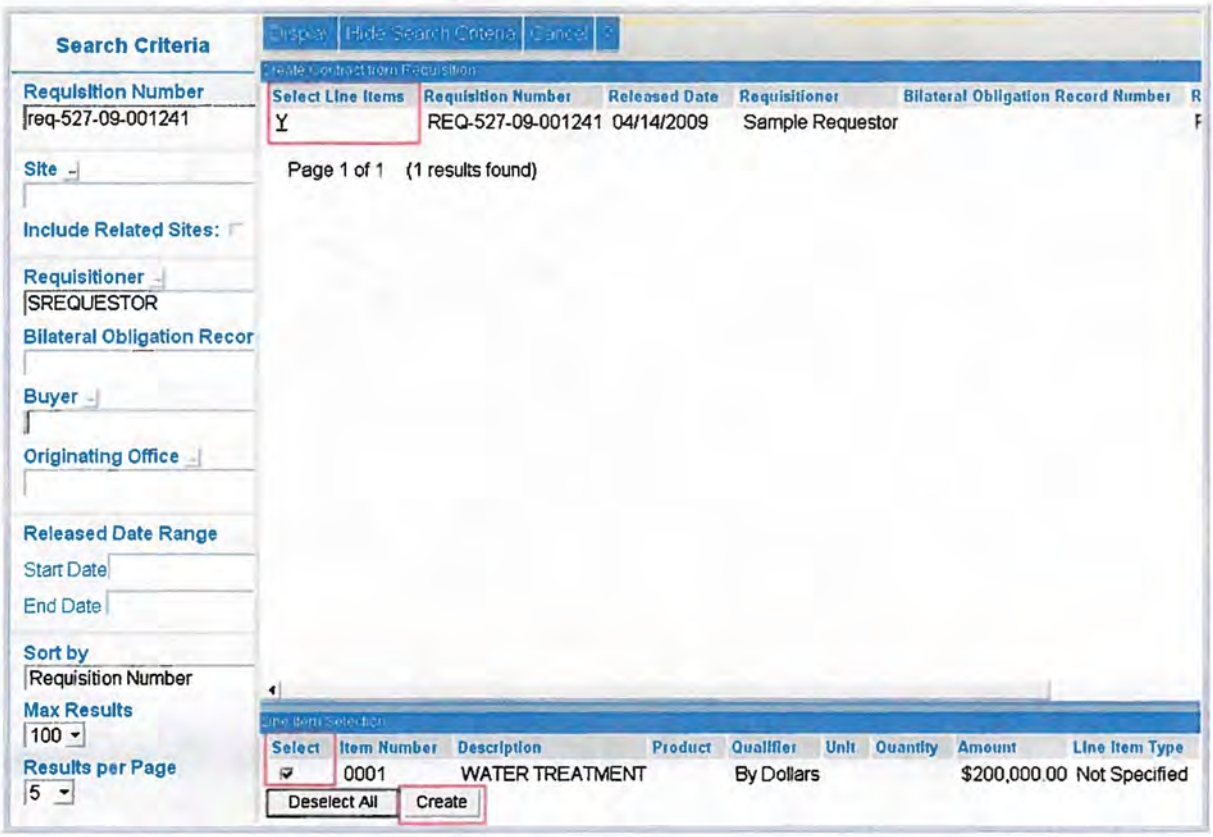


Figure 4: Create Contract from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Contract from Requisition	Click the **Y** link in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
7.	Create Contract from Requisition	Check the box in the **Select** column for each line item you want to pull into the Contract from the Requisition. Click the **Create** button.	

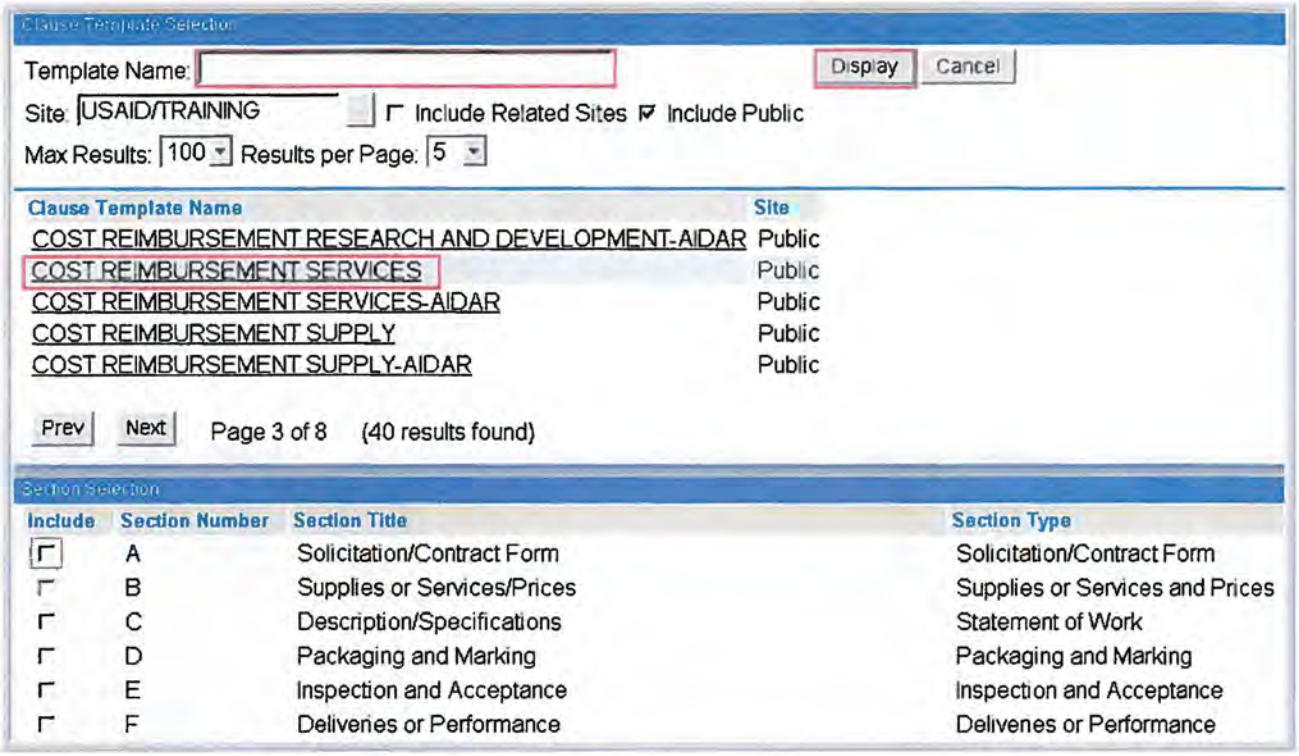


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Search for a Clause Template by **Template Name**. Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause templates include the basic FAR and AIDAR clauses you need for a Contract. You must add the FAR clauses first; you will add the AIDAR clauses later. AIDAR templates always display "AIDAR" in the template name.

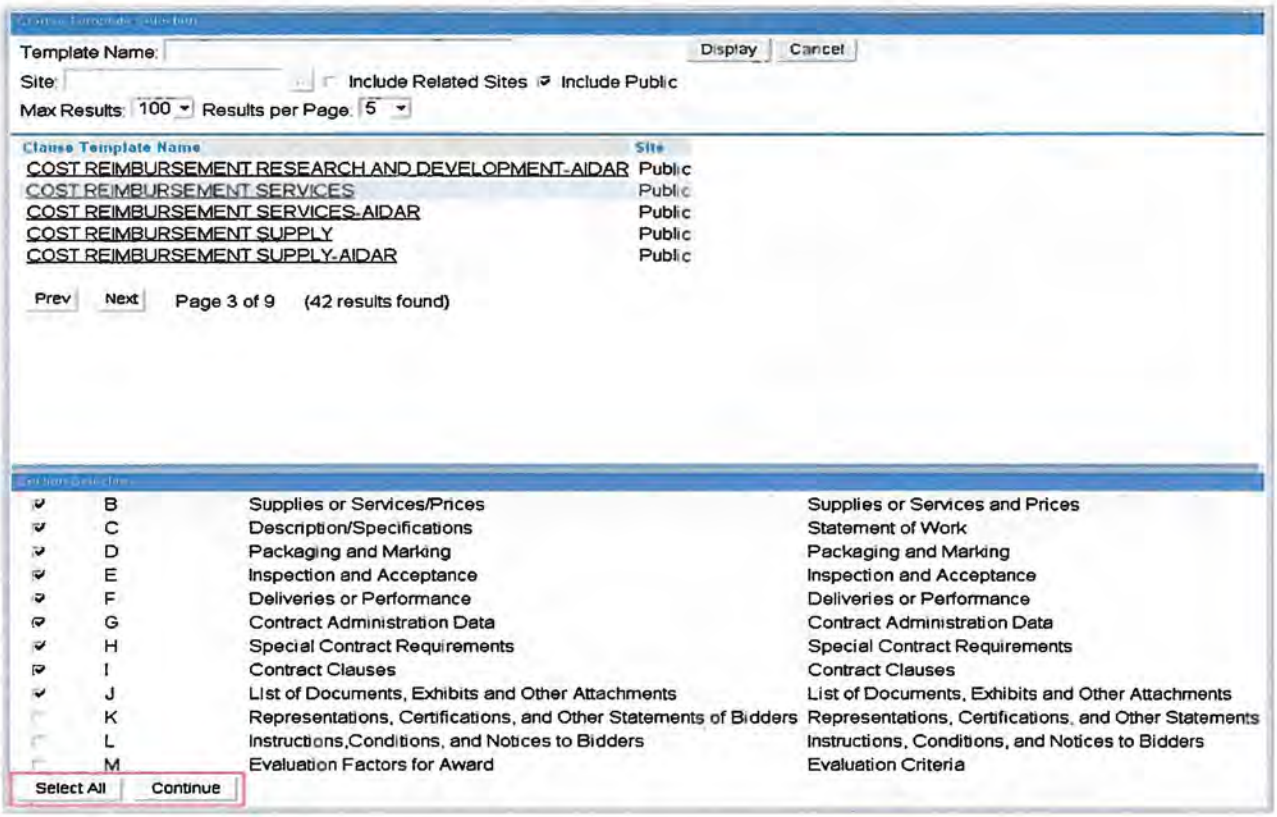


Figure 6: Clause Template Selection Screen

Steps	Section	User Action	Guidance
9.	Clause Template Selection	Click the **Select All** button to include all of the clause sections in your Contract. OR Check or uncheck the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS document.
10.	Clause Template Selection	Click the **Continue** button to pull the clauses into your Contract.	

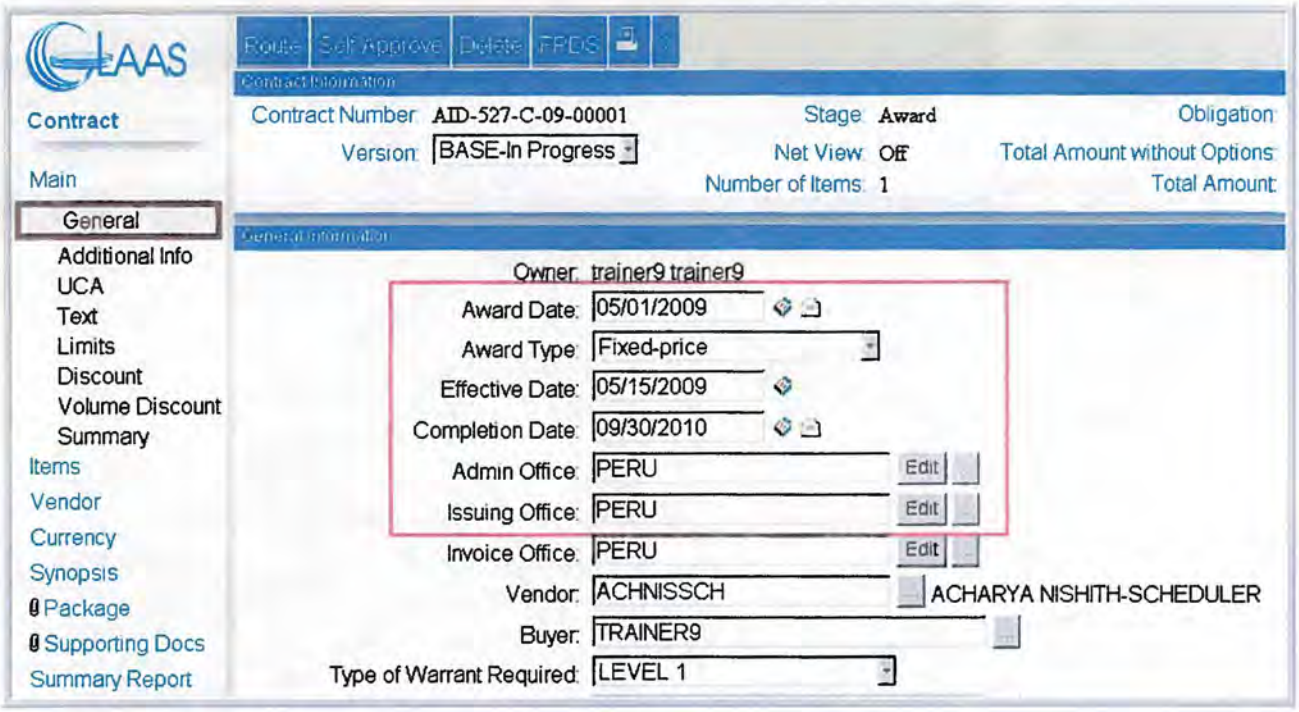


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Award Date:** Enter the date the award is signed. — R **Award Type:** Select the main award type for this contract — R **Effective Date:** Enter the Award's Period of Performance start date. — R **Completion Date:** Enter the Award's Period of Performance end date. — R **Admin Office:** Select the code for the Contracting Officer Technical Representative's (COTR) office. — R **Issuing Office:** Select the code for the contracting office. — R	The **Effective Date** populates the Obligation's Document Date field in Phoenix. The **Effective Date** must be on or after the Requisition Date for all associated Requisitions. GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The **Award Type** selected here is reported to FPDS-NG. Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for more information on which award types are reported to FPDS-NG.

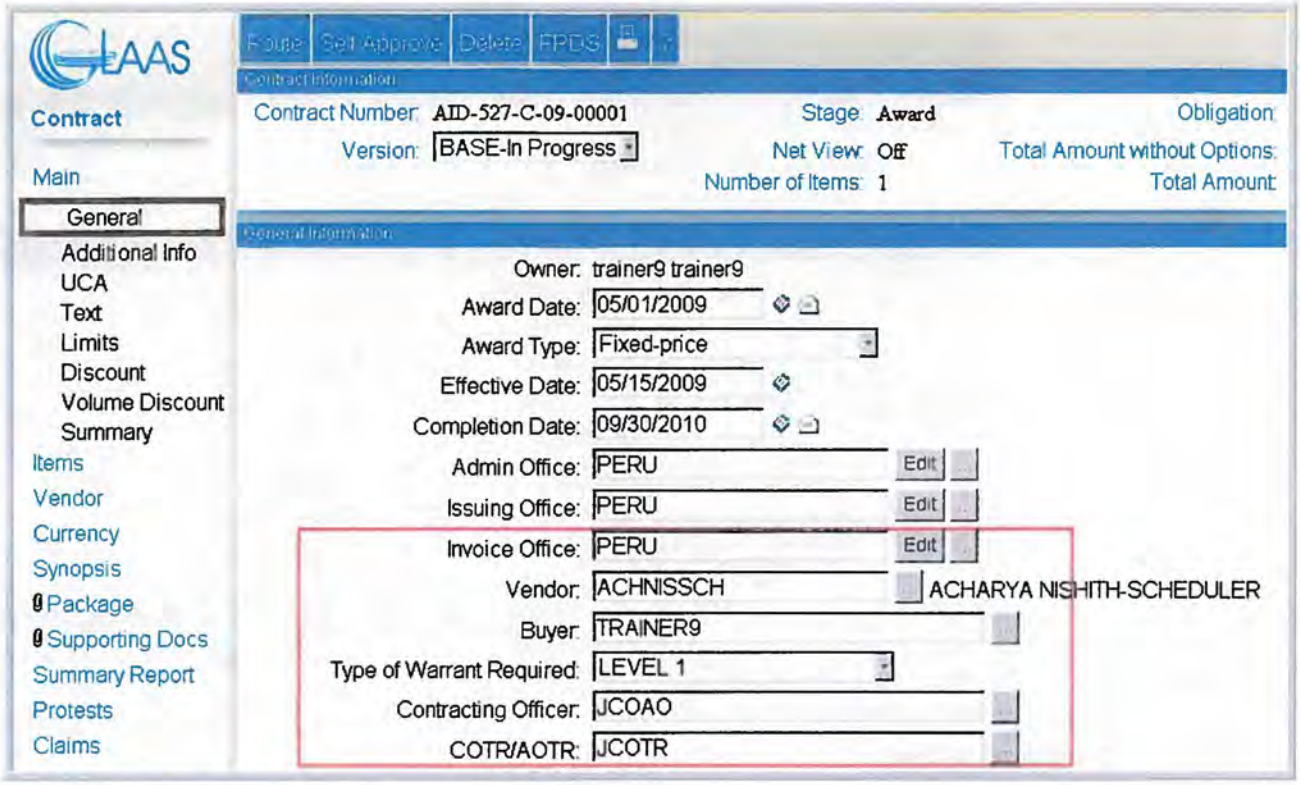


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
11. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Invoice Office:** Select the code for the office that receives the vendor invoices. — R **Vendor:** Select the Vendor code for this award. — R **Buyer:** Select the A&A Specialist for this award. — R **Type of Warrant Required:** Select a warrant level. — R **Contracting Officer:** Select the Contracting Officer for this award. — R **COTR/AOTR:** Select the COTR for this award. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The warrant level is validated against the Award TEC. Vendors assigned one of three special DUNS numbers in Phoenix will have their Vendor Name obscured in FPDS-NG: • For a sensitive domestic contractor, assign DUNS 790238638. • For a sensitive foreign contractor, assign DUNS 790238851. • For a miscellaneous foreign contractor, assign DUNS 123456787.

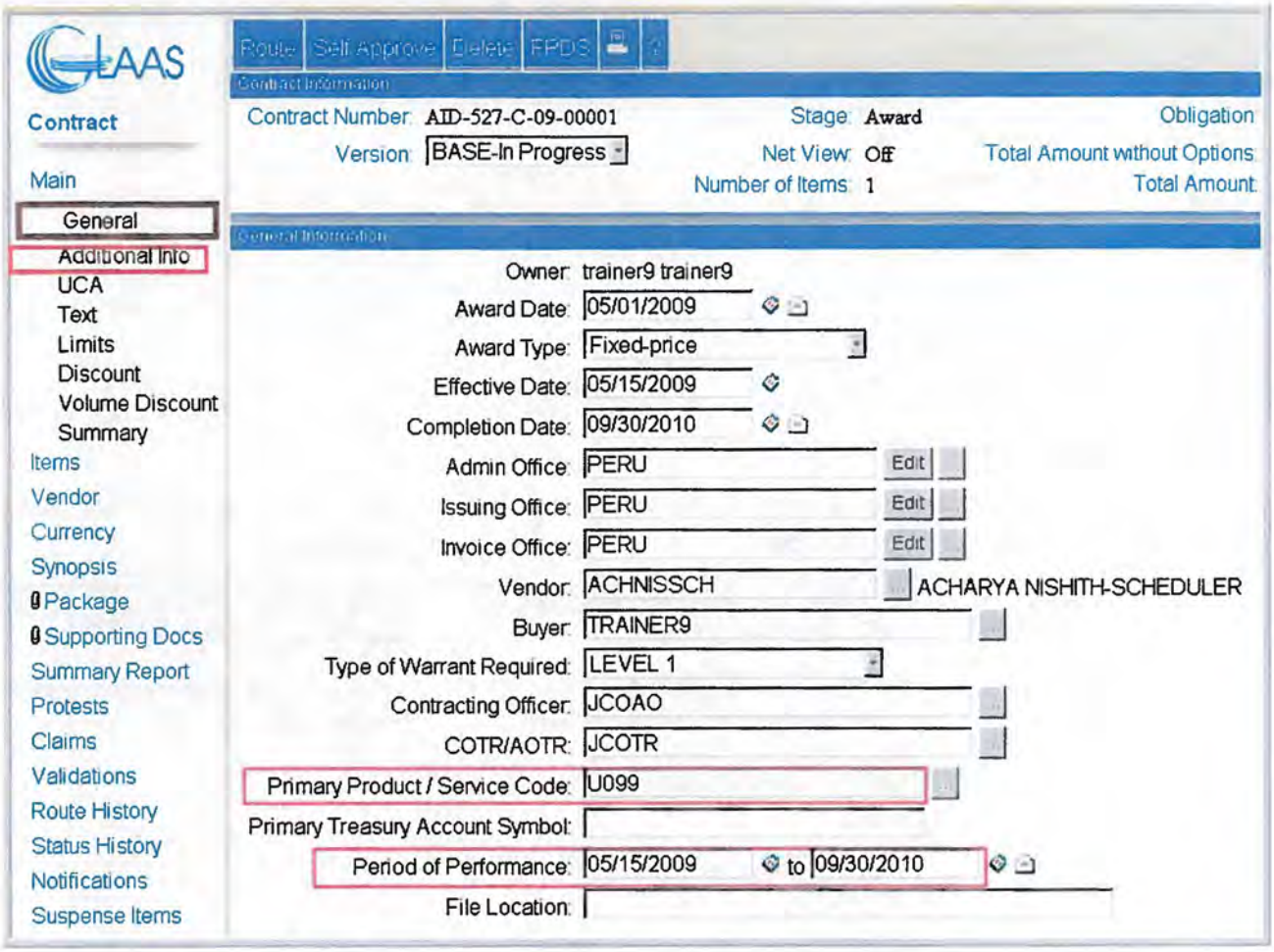


Figure 9: Main / General Screen

Steps	Section	User Action	Guidance
11. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Primary Product/Service Code:** Select the code for the goods or services on the award used to report to FPDS-NG. — R **Period of Performance:** Enter the current active period of the award. — R **File Location:** Enter the physical location of any related files. — O	**Primary Treasury Account Symbol** will be automatically populated by Phoenix once validations have been done. (Do NOT manually populate this field.)
12.	Main / General	Click the **Additional Info** link on the left-hand menu.	

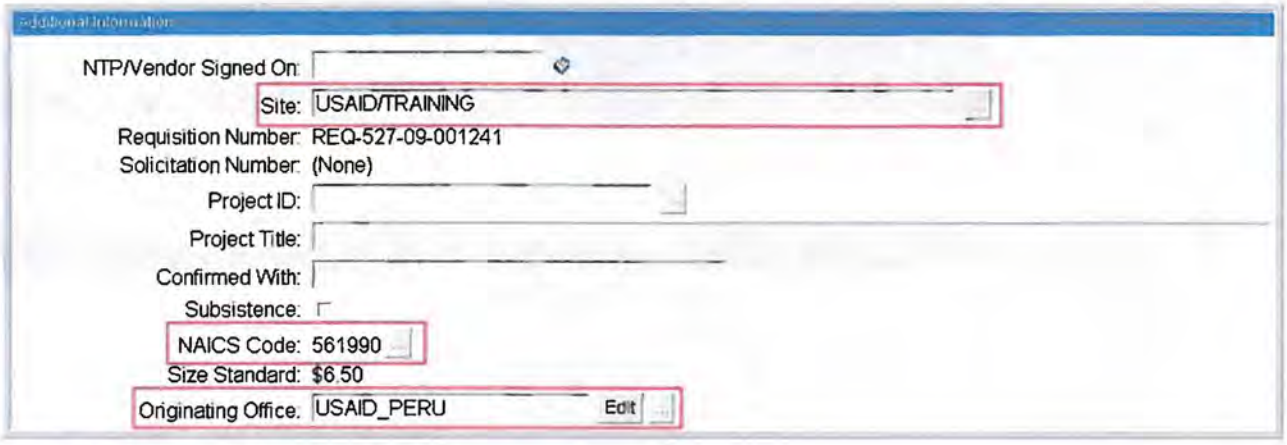


Figure 10: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		**Size Standard** will auto-populate when the **NAICS Code** is selected. USAID is not currently using the **Project ID** field.
		NTP/Vendor Signed On: Enter the date the "Notice to Proceed" was issued or the date the vendor acknowledged the order.	O	
		Site: Defaults to the site of the Requisition.	R	
		Project Title: The Project Title will populate from the Requisition if it was associated to an APP.	O	
		Confirmed With: Use this field if you want the system to print on the award: "Do not duplicate, confirm order with _____."	O	
		Subsistence: Check the box if the award is for food or shelter.	O	
		NAICS Code: Select the appropriate code from the list.	R	
		Originating Office: Select the code for the requesting office.	R	

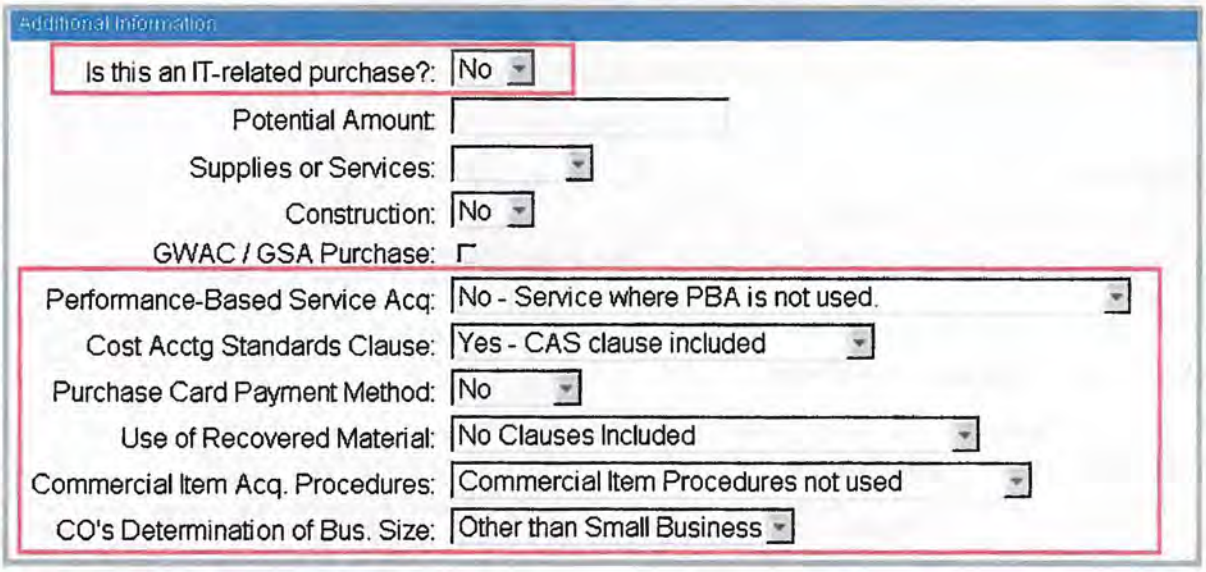


Figure 11: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Keep Item Numbers Constant on DO/TO** (not shown) • **Potential Amount** • **Supplies or Services** • **Construction** • **GWAC / GSA Purchase**
		Is this an IT-related purchase?: Select "Yes" if this is related to an IT purchase.	R	
		Performance-Based Service Acq: Select the appropriate value from the dropdown list.	R	
		Cost Acctg Standards Clause: Select the appropriate value from the dropdown list.	R	
		Purchase Card Payment Method: Select "Yes" if a purchase card was used.	R	
		Use of Recovered Material: Select the appropriate value from the dropdown list.	R	
		Commercial Item Acq. Procedures: Select the appropriate value from the dropdown list.	R	
		CO's Determination of Bus. Size: Select the appropriate value from the dropdown list.	R	

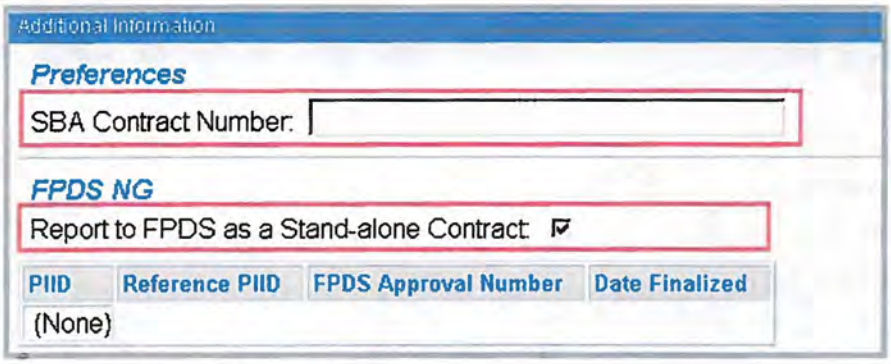
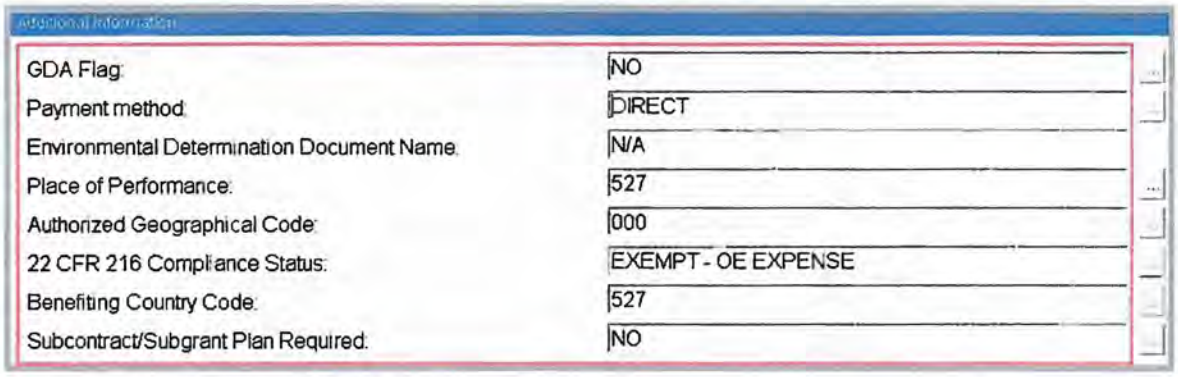


Figure 12: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **SBA Contract Number:** Type the SBA contract number, if applicable. — R/O **Report to FPDS as a Stand-alone Contract:** Check the box if you do not wish to issue Delivery/Task Orders against this Contract. — R/O	Once the system interfaces with FPDS-NG, it will auto-populate the **PIID** and the **FPDS Approval Number**.



GDA Flag:	NO
Payment method:	DIRECT
Environmental Determination Document Name:	N/A
Place of Performance:	527
Authorized Geographical Code:	000
22 CFR 216 Compliance Status:	EXEMPT - OE EXPENSE
Benefiting Country Code:	527
Subcontract/Subgrant Plan Required:	NO

Figure 13: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **GDA Flag:** Select "YES" if this action is for a Global Development Alliance initiative. — R **Payment Method:** Select from the list how the award will be paid. — R **Environmental Determination Document Name:** Enter a document title (if applicable), otherwise enter "N/A." — R **Place of Performance:** Select the three-digit code indicating the country where the work will be performed. — R **Authorized Geographical Code:** Select the three-digit code indicating the country that is authorizing the work to be done. — R **22 CFR 216 Compliance Status:** Select an environmental compliance status code. — R **Benefiting Country Code:** Select the code of the country that will benefit from this action. — R **Subcontract/Subgrant Plan Required:** Select "YES" if a subcontract/subgrant plan is required. — R	The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.

Performanced Based Contract/Results Oriented Grant:	YES
Name of Subcontractor/Subgrantee:	
Vessel Flag Priority:	
Leveraging:	
Grants Under Contract/Contracts Under Grant:	YES
COTR/AOTR Assigned Date:	04/21/2009
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned CTO and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?:	YES

Figure 14: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		
		Performance Based Contract /Results Oriented Grant: Select "YES" if this will be a performance-based contract.	R	
		Name of Subcontractor/ Subgrantee: Enter the name of the subcontractor/subgrantee if applicable.	O	
		Vessel Flag Priority: Enter the flag priority, if applicable.	O	
		Leveraging: Enter a value if this award was leveraged, if applicable.	O	
		Grants Under Contract/Contracts Under Grant: Select "YES" if Grants Under Contract (GUCs) is authorized.	O	
		COTR/AOTR Assigned Date: Enter the date that the COTR was assigned to this award.	R	
		Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties? Select "YES" or "N/A."	R	
		Has a hard copy been placed in the OAA contract award file? Select "YES" or "N/A."	R	

Acctg Period:	
Reporting Acctg Period:	
Action Type:	CA1
Award TEC:	2604574
NMS Award Fee Amount:	
NMS Award Other Amount:	
AIDAR/Agency Exemptions to Competition:	0

Figure 15: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		If the award is incrementally funded, the Award TEC will be greater than the committed amount. This is the Requestor's way to specify the award TEC and to indicate that you should increase the amount on the Solicitation / Award. **NMS Award Fee Amount** and **NMS Award Other Amount** are populated from NMS on Migrated Awards.
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Action Type: Select a code identifying the type of award action.	R	
		Award TEC: Enter the Total Estimated Cost of the Award.	R	
		AIDAR/Agency Exemptions to Competition: Select a code to identify the type of exemption, or select "0" if the award is competitive.	R	

Competition (Yes/No):	NO
Earmark/Directive/Other:	N/A
Earmark/Directive/Other Description:	
Requisition Number (for mods only):	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

Figure 16: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Competition (Yes/No):** Select "YES" or "NO" to indicate if this action will be competed or not. — R **Earmark/Directive/Other:** Select a value to indicate if this award action is based on Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — R **Requisition Number (for mods only)**: If this is a modification, select the Requisition number. If this is a new award, select "0" for "Not Applicable." — R **Send notification to Requestor(s) of unused funds on the Requisition?:** Select "YES" to send a notification to Requestor(s), advising them of unobligated funds. Select "NO" to not notify the Requestor(s) of unobligated funds. — R	
14.	Main / Additional Info	If this is an Undefinitized Contract Action (UCA), click the **UCA** link on the left-hand menu (not shown). OR Click the **Text** link on the left-hand menu (not shown) and skip to **Step 17**.	

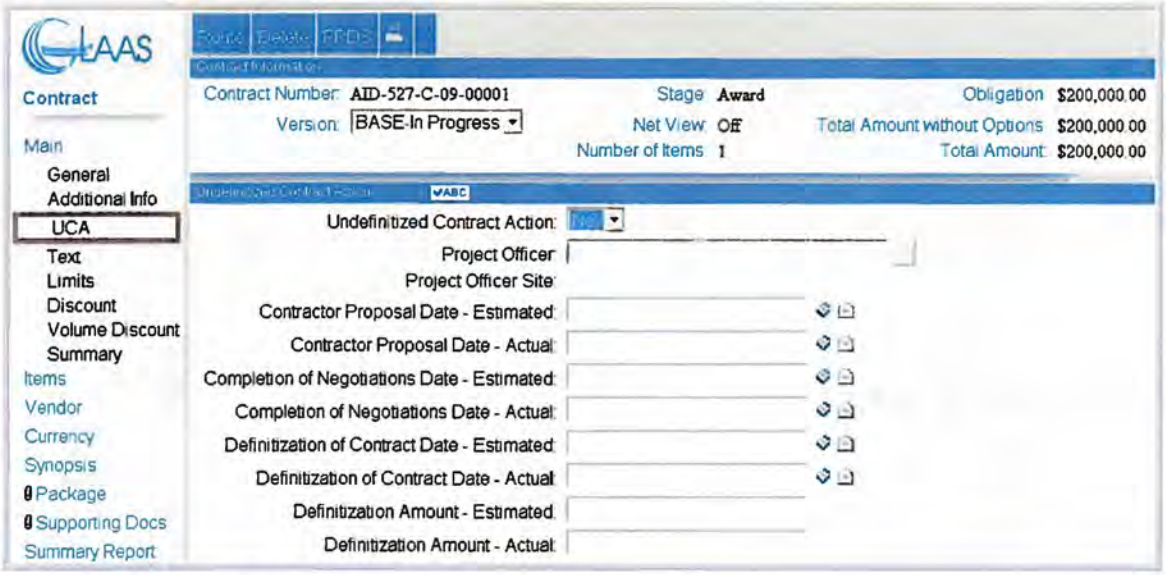


Figure 17: Main / UCA Screen

Steps	Section	User Action	Guidance
15.	Main / UCA	Complete the following Required (R) and/or Optional (O) fields: **Undefinitized Contract Action:** This field defaults to "No." Select "Yes" from the dropdown list if this is a UCA. — R **Project Officer:** Select a project officer from the dropdown list. — O **Contractor Proposal Date (Estimated** and **Actual):** Enter the estimated and actual dates when the contractor will submit the proposal. — O **Completion of Negotiations Date (Estimated** and **Actual):** Enter the estimated and actual dates when the negotiations will be (or were) completed. — O **Definitization of Contract Date (Estimated** and **Actual):** Enter the estimated and actual dates when the award is definitized. — O **Definitization Amount (Estimated** and **Actual):** Enter the estimated and actual Award amounts. — O	If this is not a UCA action, this entire screen is optional. The UCA section is mainly used for Letter Contracts.

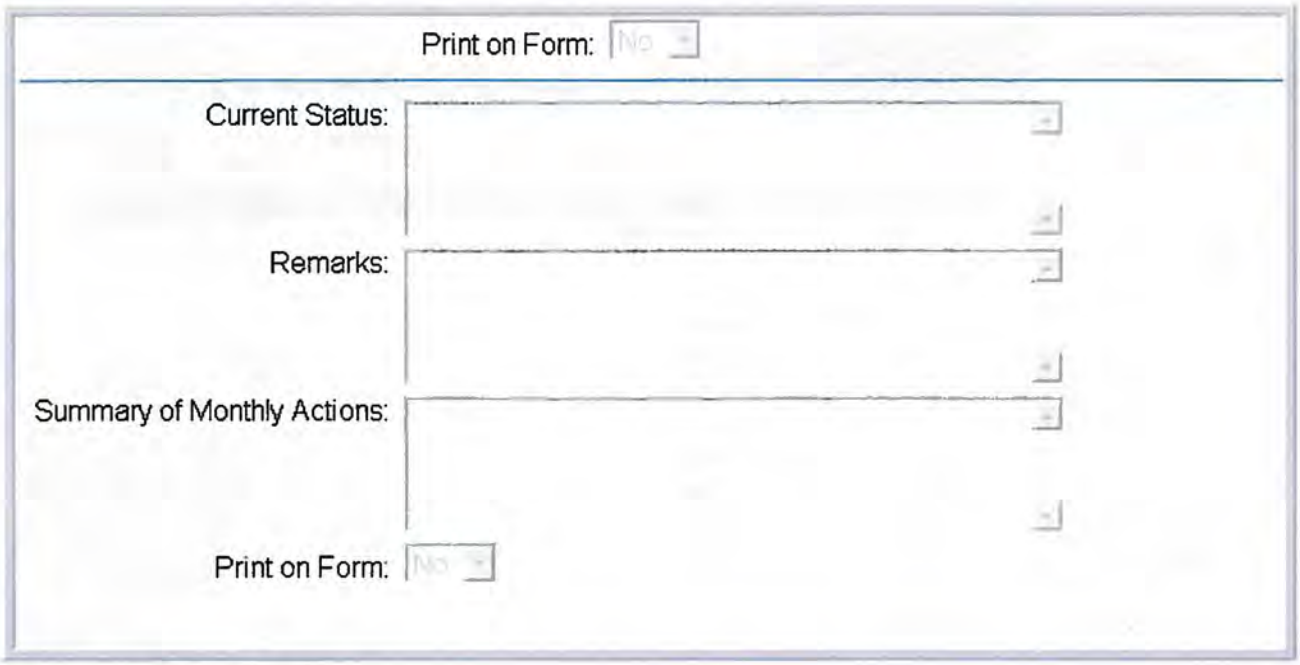


Figure 18: Main / UCA Screen

Steps	Section	User Action		Guidance
15. cont.	Main / UCA	Complete the following Required (R) and/or Optional (O) fields:		
		Print on Form: Defaults to "No;" select "Yes" to print the estimated and actual dates and contract amount on the Award form.	O	
		Current Status: Enter a brief description of the UCA's status.	O	
		Remarks: Enter any remarks about the UCA.	O	
		Summary of Monthly Actions: Enter a description of each month's UCA actions.	O	
		Print on Form: Defaults to "No;" select "Yes" to print the status, remarks and summary on the Award form.	O	
16.	Main / UCA	Click the **Text** link on the left-hand menu (not shown).		

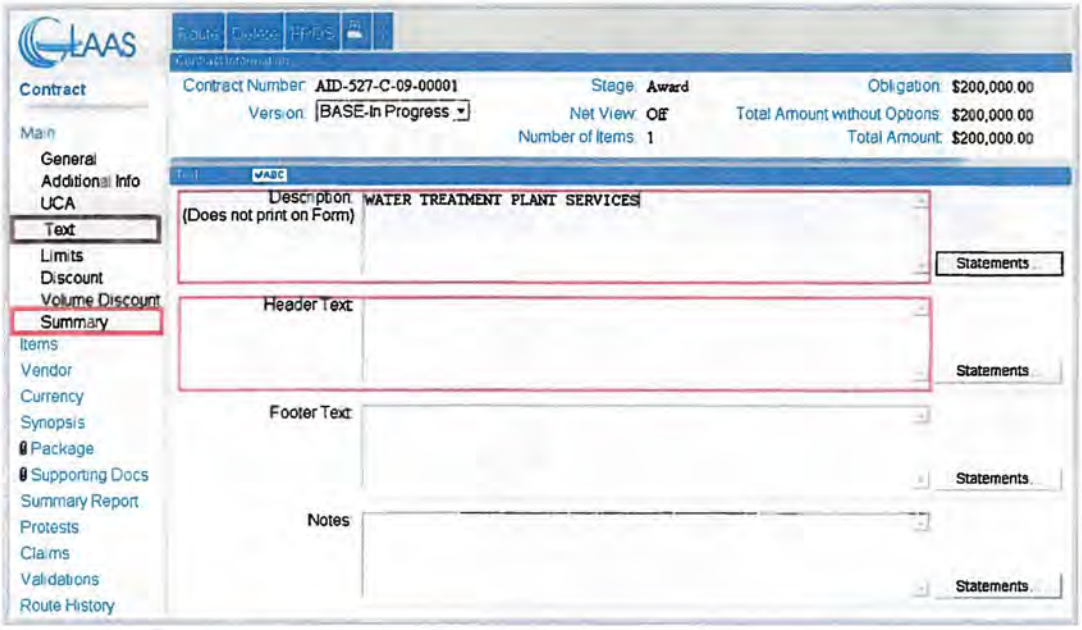


Figure 19: Main / Text Screen

Steps	Section	User Action	Guidance
17.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services to be purchased with this action. This will not print on the award. — R **Header Text:** Enter a short (50 characters or less) description of the award. This will print out once at the top of the schedule on the award. — R **Footer Text:** Will print once at the bottom of the schedule on the award. — O **Notes:** Enter any additional text for the award. This will not print on the award. — O	**WARNING!** Do not enter sensitive procurement information in the **Description** field. Each text field will hold up to seven typed pages. The first 255 characters of the **Description** carry over to the Description field in Phoenix. The first 50 characters of the **Header Text** carry over to the Title field in Phoenix. The **Statements** button contains standard language and can be edited once loaded in the field.
18.	Main / Text	Click the **Summary** link on the left-hand menu.	Refer to the *Creating a Competitive Indefinite Quantity Contract (IQC)* user guide to learn about using **Limits**. USAID is not currently using these links on the left-hand menu: • **Discount** • **Volume Discount**

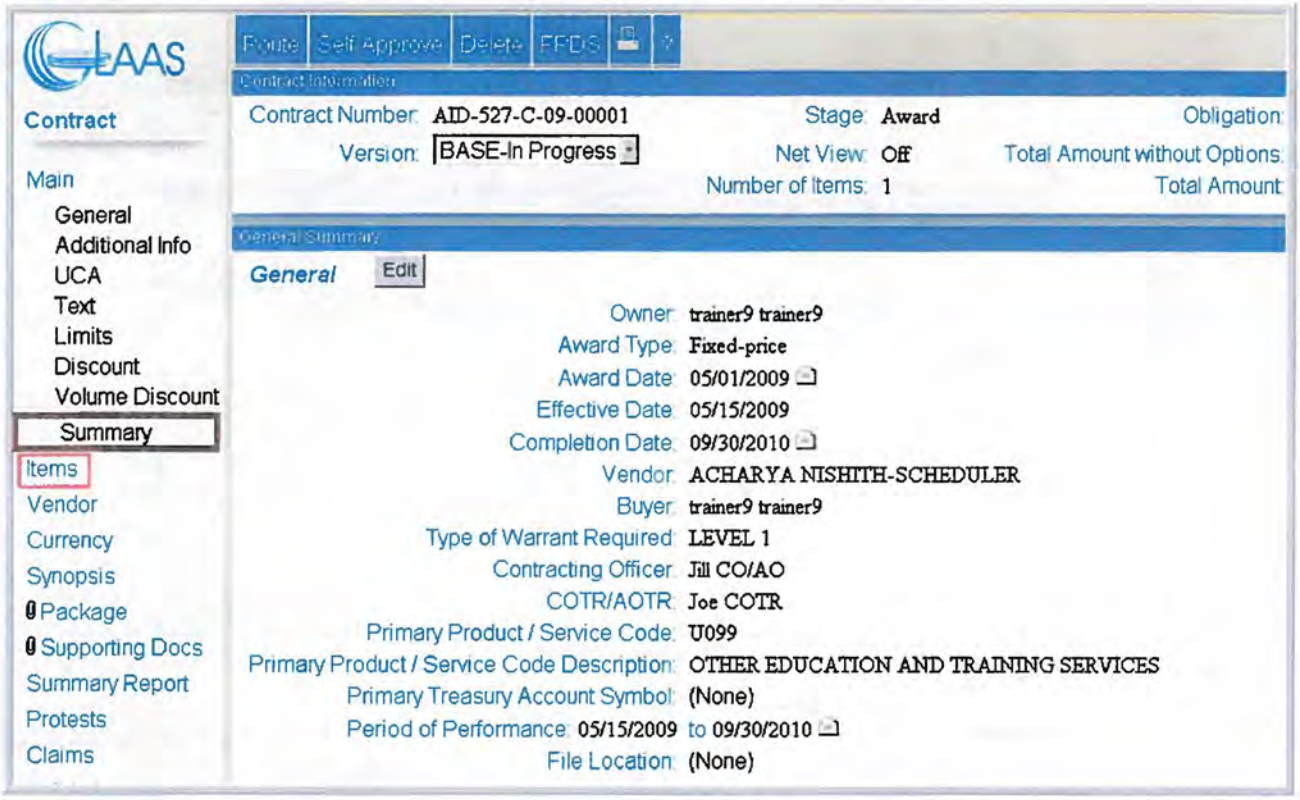


Figure 20: Main / Summary Screen

Steps	Section	User Action	Guidance
19.	Main / Summary	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your document thus far. Click the various **Edit** buttons (Edit) to make any changes.
20.	Main / Summary	Click the **Items** link on the left-hand menu.	

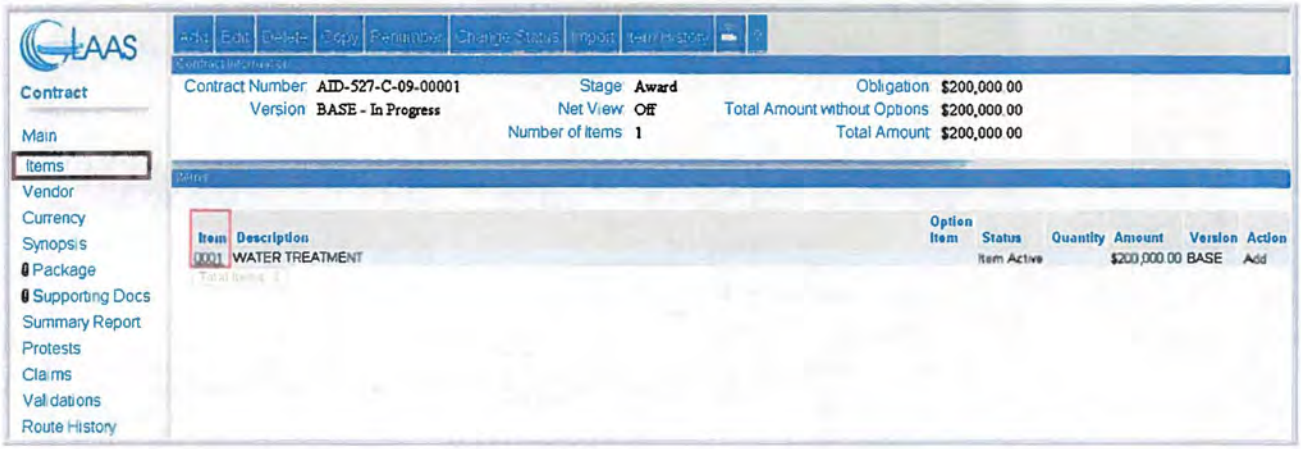


Figure 21: Items Screen

Steps	Section	User Action	Guidance
21.	Items	Click an **Item** number link.	

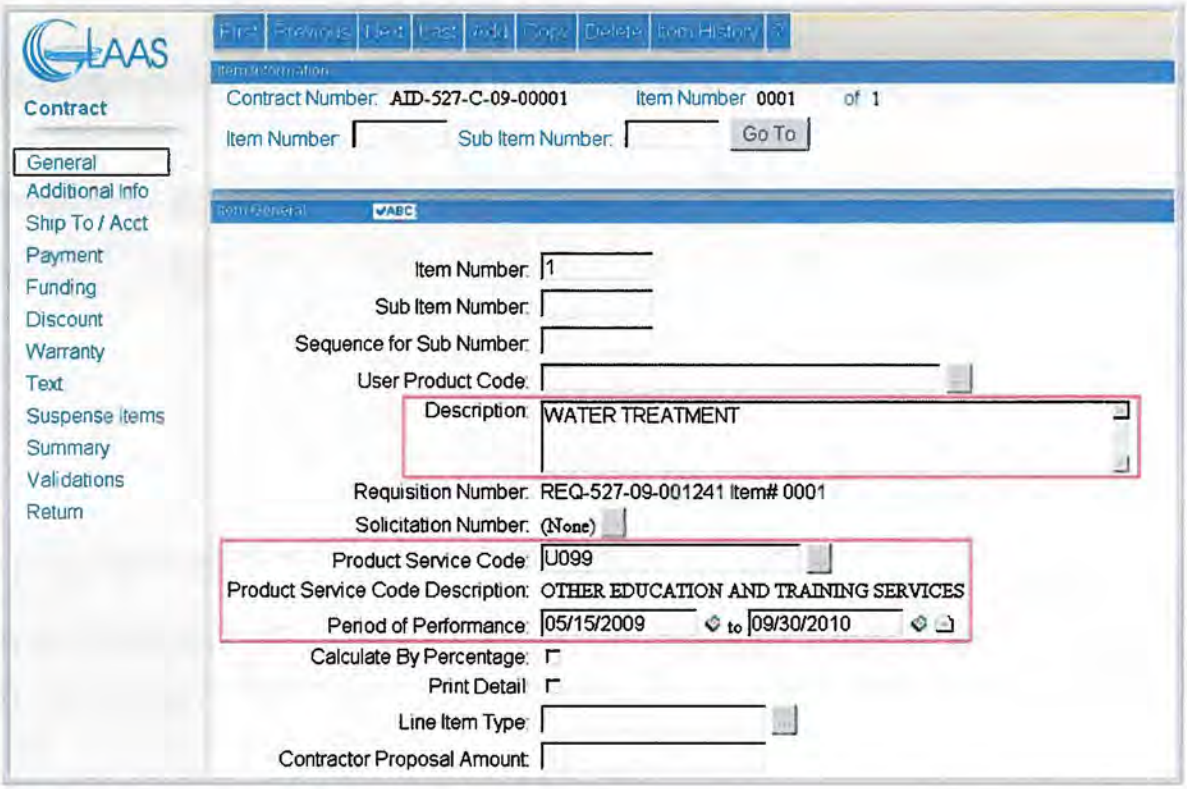


Figure 22: Items / General Screen

Steps	Section	User Action		Guidance
22.	Items / General	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Sub Item Number** • **Sequence for Sub Number** • **User Product Code** • **Calculate By Percent** If the Award is created from a Solicitation, the **Contractor Proposal Amount** will auto-populate. For a non-competitive contract, it will be blank. The Period of Performance for line items which are not marked as optional must be within the Award's Period of Performance.
		Description: Enter a description for the item.	R	
		Solicitation Number: To associate a Solicitation to this line item, click the lookup button ( ).	O	
		Product Service Code: Enter the code to identify the product or service being ordered.	R	
		Period of Performance: Enter the effective and completion dates for the item.	R	
		Print Detail: Check the box if you want to print additional information about the line item on the cover page (i.e., Award Type)	O	
		Line Item Type: Select one, if applicable.	O	

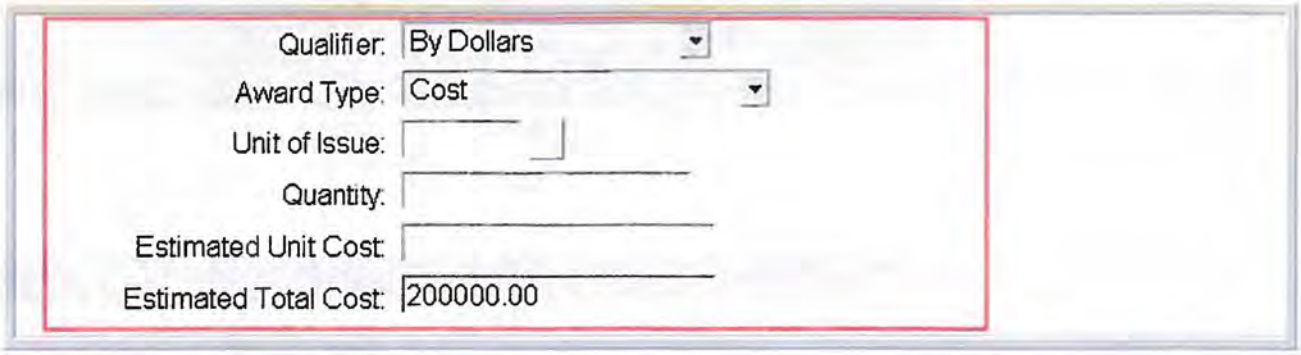


Figure 23: Items / General Screen

Steps	Section	User Action	Guidance
22. cont.	Items / General	Complete the following Required (R) and/or Optional (O) fields: **Qualifier:** Select "By Quantity" or "By Dollars." — R **Award Type:** Select the appropriate Award Type. Based upon this selection, additional fields may appear. — R **Unit of Issue/Quantity/Estimated Unit Cost:** If "By Quantity" was selected as the **Qualifier**, these are required fields. — R/O **Estimated Total Cost/Amount:** Enter the total estimated cost for this item if "By Dollars" was selected as the **Qualifier**. — R	Based upon which **Award Type** you select, the Amount fields may change. The Estimated Total Costs of the items must add up to the Award TEC. The **Estimated Total Cost** of the item must be entered on the **Items / General** screen and in the **Ship To Value** field.
23.	Items / General	Click the **Additional Info** link on the left-hand menu (not shown).	

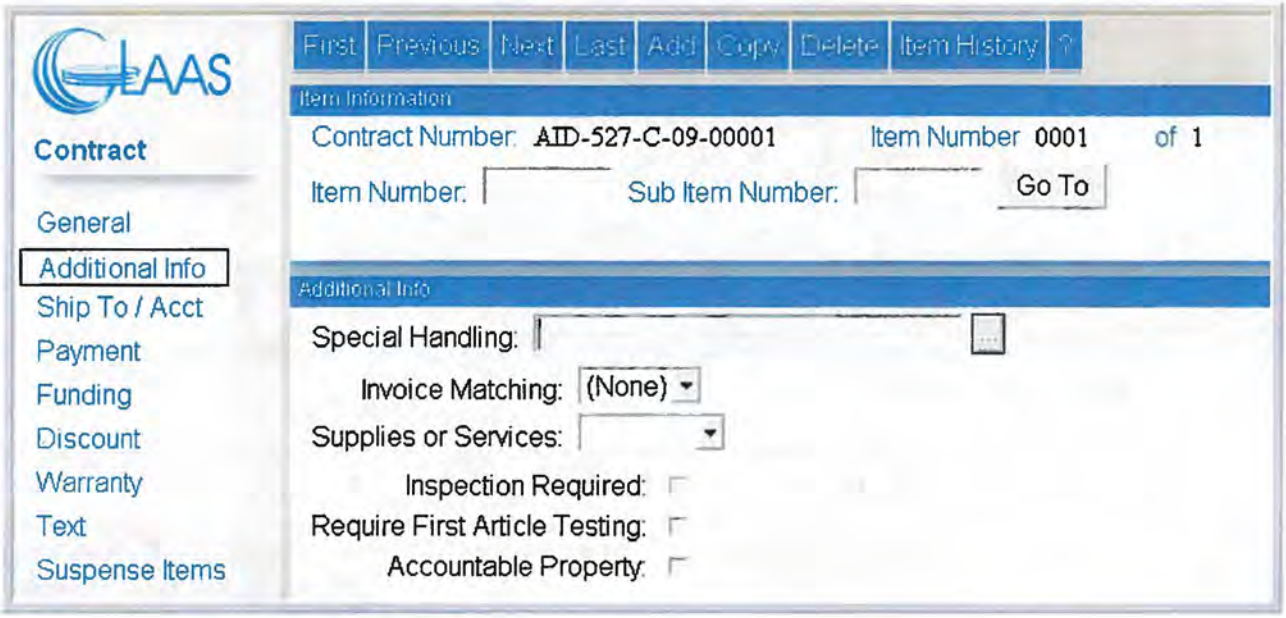


Figure 24: Items / Additional Info Screen

Steps	Section	User Action		Guidance
24.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Invoice Matching** • **Supplies or Services** • **Accountable Property** Checking the box for **Require First Article Testing** will give an additional option for **Days After** at the **Ship To** level.
		Special Handling: Select special handling instructions, if applicable.	O	
		Inspection Required: Check the box if inspection of the supplies are required.	O	
		Require First Article Testing: Check this box if first article testing is required before the full shipment of goods.	O	

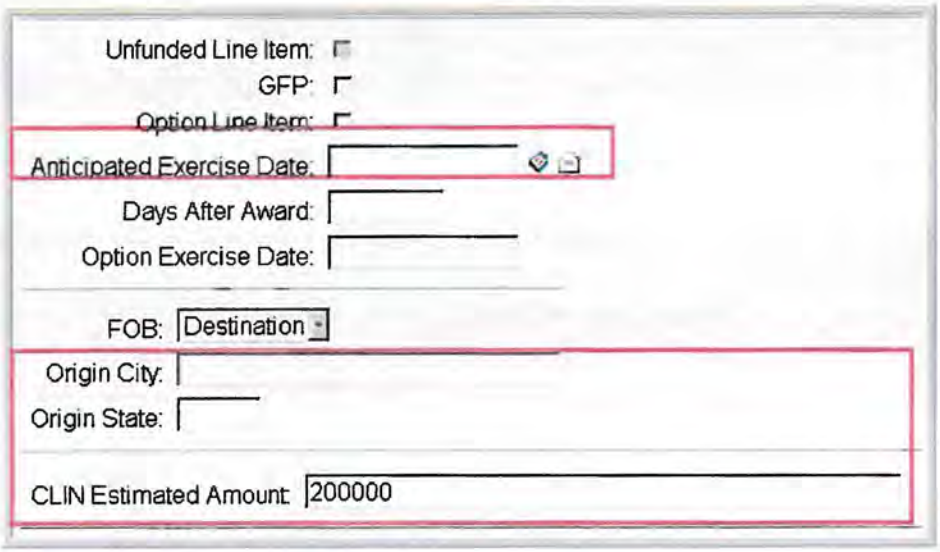


Figure 25: Items / Additional Info Screen

Steps	Section	User Action	Guidance
24. cont.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Unfunded Line Item:** Select the checkbox if this line item is subject to availability of funds and the accounting information is unknown. — O **GFP:** If the line item is Government Furnished Property, check this box. — O **Option Line Item:** Check this box if this is an option line item. — O **Anticipated Exercise Date:** If the Option Line Item is selected, you are required to enter the date you think you will exercise this option, or enter the number of **Days After Award** you expect to exercise this option. — R/O **FOB**: Select an option if this item has Free On Board (FOB) shipping. — O **Origin City / State:** Enter the City and State if "Origin" is selected for FOB. — R/O **CLIN Estimated Amount:** The estimated amount of the line item is copied forward from the Requisition. — R/O	Selecting any of the following checkboxes will zero out the obligation of the line item: • **Unfunded Line Item** • **GFP** • **Option Line Item** If this is an option line item, **Option Exercise Date** will auto-populate when the option is exercised.

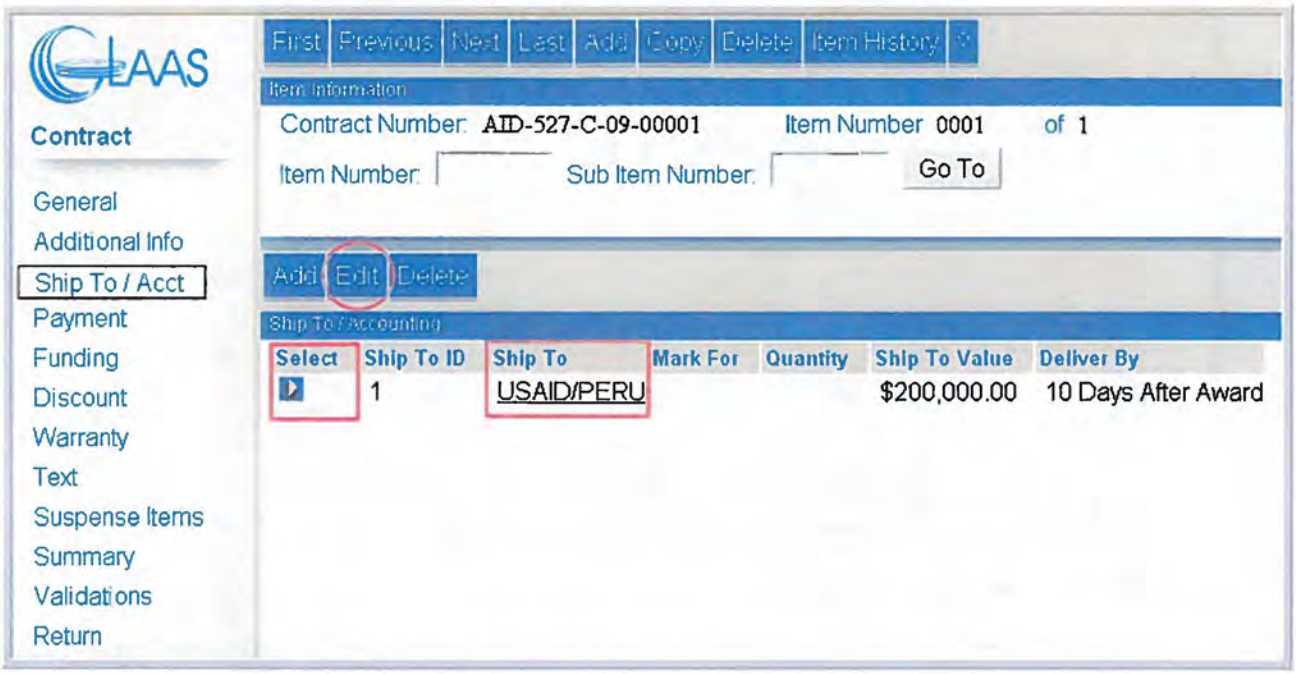


Figure 26: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
25.	Items / Additional Info	Click the **Ship To / Acct** link on the left-hand menu.	
26.	Items / Ship To / Acct	Click the **Ship To** link.	

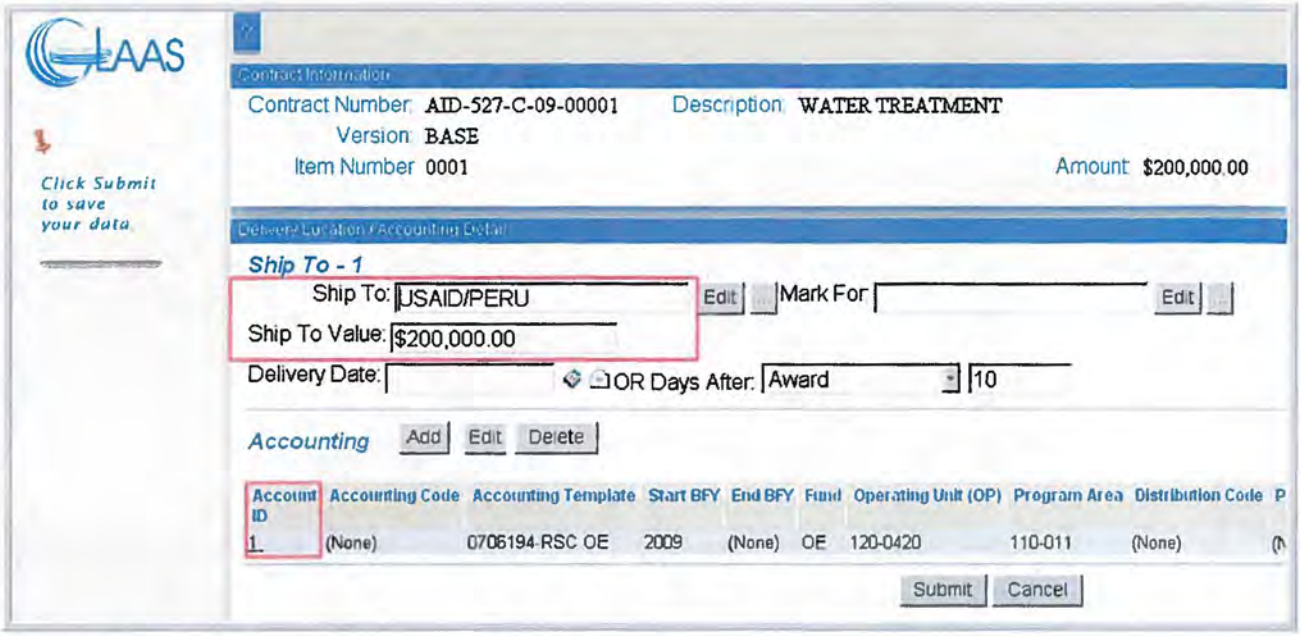


Figure 27: Delivery Location / Accounting Detail Screen

Steps	Section	User Action	Guidance
27.	Delivery Location / Accounting Detail	Complete the following Required (R) and/or Optional (O) fields: **Ship To:** Select the office code for your site or mission. — R **Mark For:** Select the office that will actually receive the items or service. — O **Ship To Value:** Enter the total estimated cost for this item. This value should correspond to the **CLIN Estimated Amount** on the **Items / Additional Info** screen for the line item. — R **Delivery Date or Days After Award:** Choose a delivery date, or specify delivery based on a certain number of days — O	
28.	Delivery Location / Accounting Detail	Click the **Account ID** number link.	

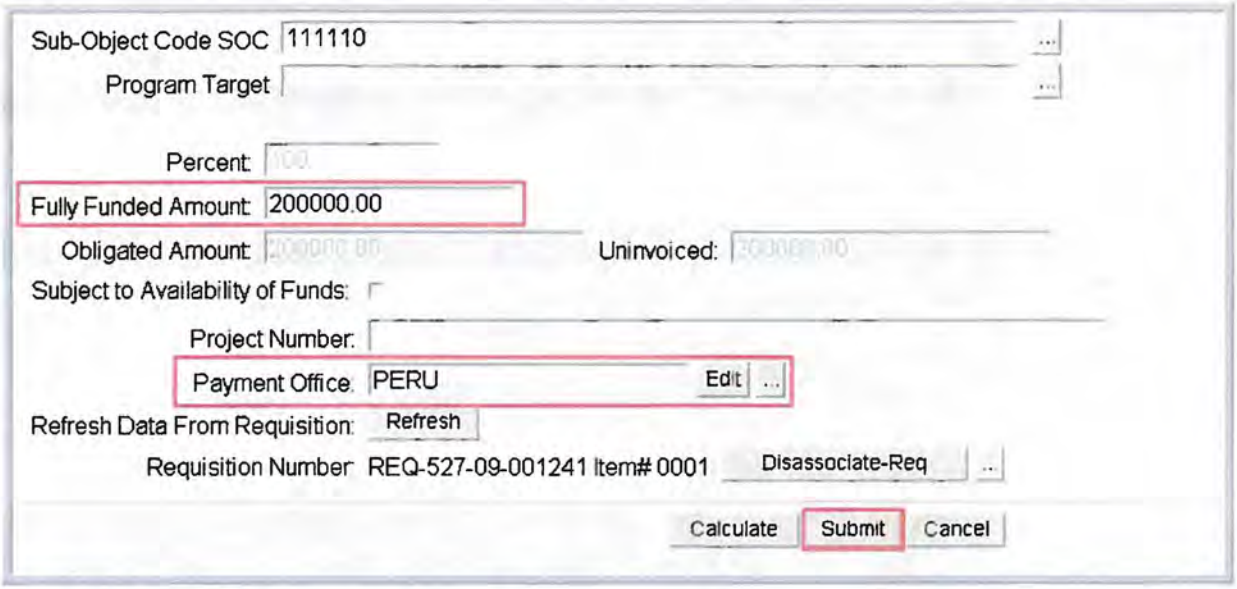


Figure 28: Accounting Information Detail Screen

Steps	Section	User Action	Guidance
29.	Accounting Information Detail	Complete the following Required (R) and/or Optional (O) fields: **Fully Funded Amount:** This is the committed amount from the Requisition and the amount to be obligated on the award. This should only be changed if you are obligating a lesser amount. — R **Payment Office:** Enter the code for the office paying the invoice. — R	**WARNING!** Never change the Accounting information from the Requisition. **Subject to Availability of Funds:** If this box is checked, the obligation for this Accounting line will be zeroed out.
30.	Accounting Information Detail	Click the **Submit** button.	
31.	Delivery Location / Accounting Detail	Click the **Submit** button (not shown).	

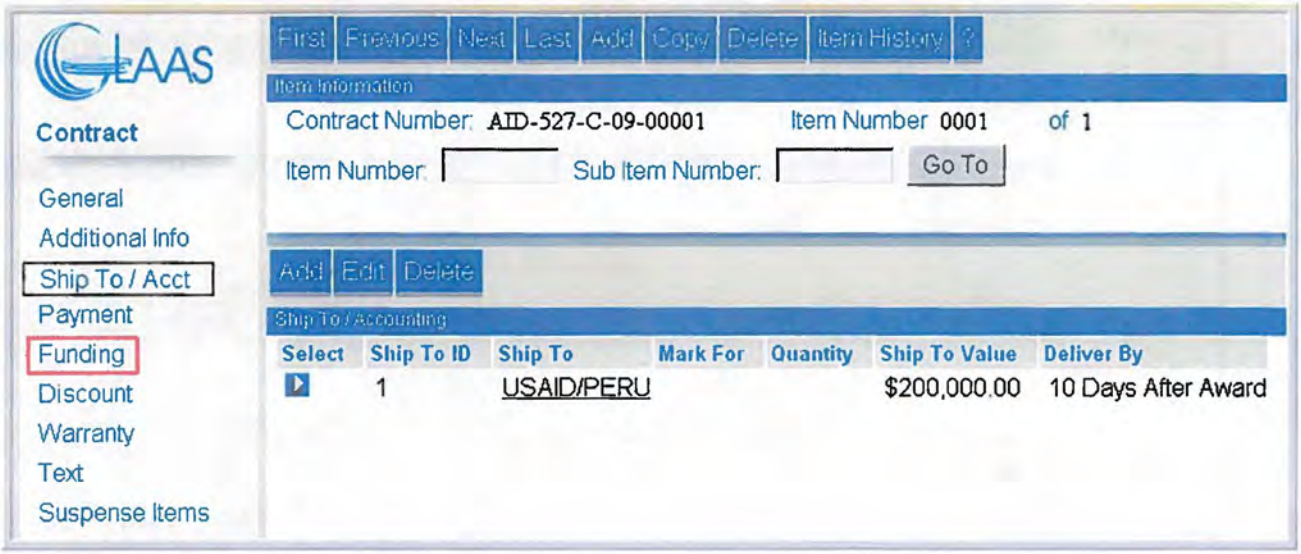


Figure 29: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
32.	Items / Ship To / Acct	Click the **Funding** link on the left-hand menu.	USAID is not currently using the **Payment** link on the left-hand menu.

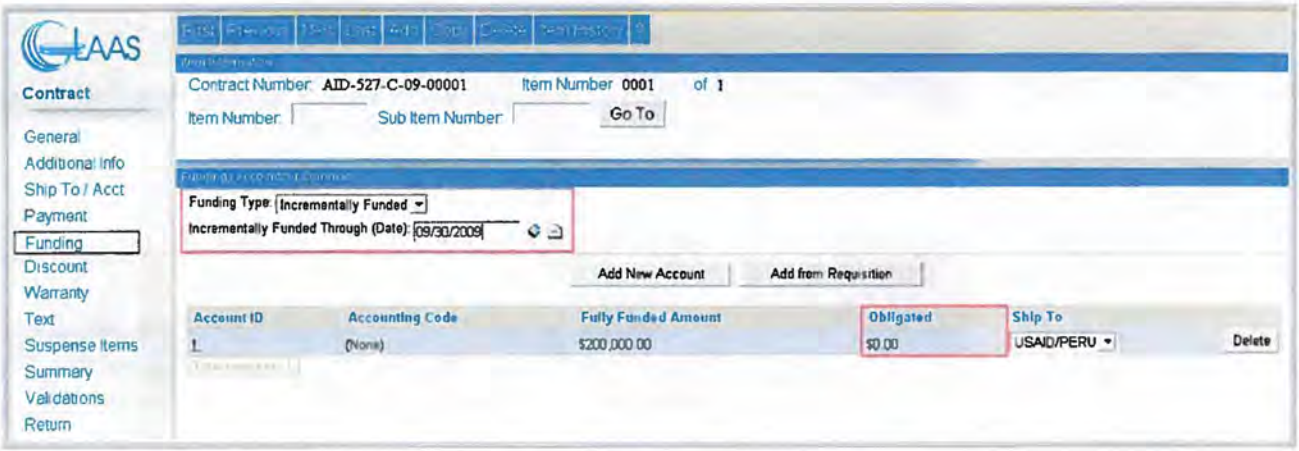


Figure 30: Items / Funding Screen

Steps	Section	User Action	Guidance
33.	Items / Funding	Select "Incrementally Funded" from the **Funding Type** dropdown list if the award is incrementally funded. **Incrementally Funded Through (Date):** Enter the date through which the item is incrementally funded. OR Select "Fully Funded" from **Funding Type** dropdown list if the award is fully funded.	If this is a fully funded award you can skip to **Step 37**. Selecting "Incrementally Funded" from the dropdown list will change the obligation amount to zero in the **Obligated** column. If the sum of the accounting lines is less than the line item amount, the award is considered to be incrementally funded. If the **Obligated** amount has been changed to zero, you will enter the correct obligated amount in the **Incrementally Funded Amount** field.

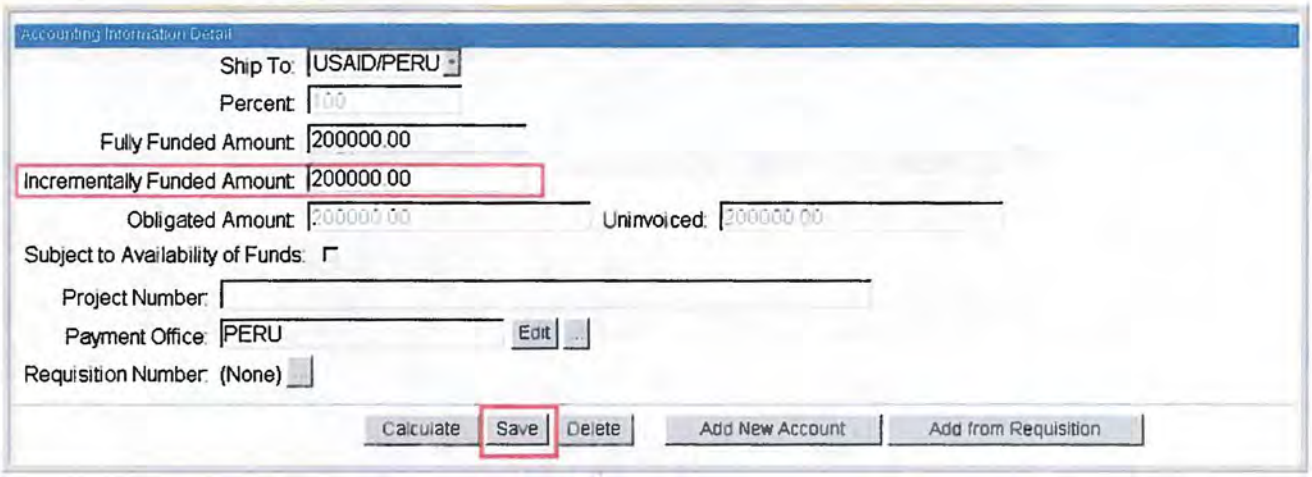


Figure 31: Items / Funding Screen

Steps	Section	User Action	Guidance
34.	Items / Funding	Complete the following Required (R) and/or Optional (O) fields: **Incrementally Funded Amount**: Enter the amount of incremental funding against this accounting line for this action. — R	When you are incrementally funding, the **Fully Funded Amount** field is ignored.
35.	Items / Funding	Click the **Save** button.	

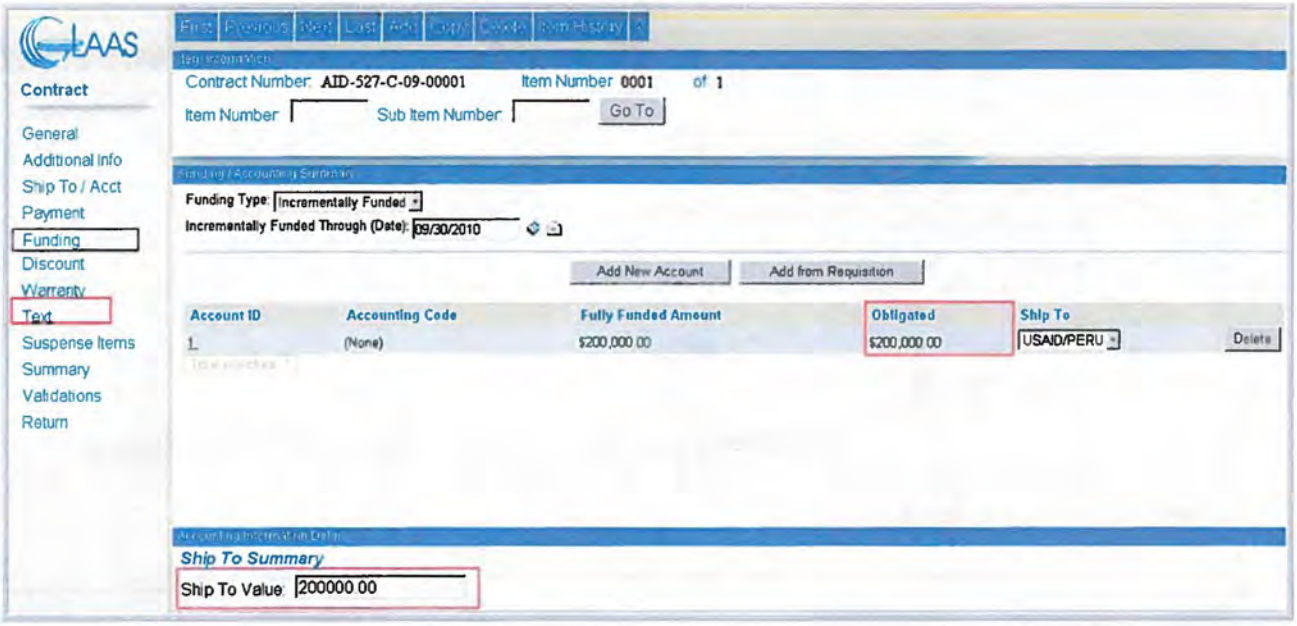


Figure 32: Items / Funding Screen

Steps	Section	User Action	Guidance
36.	Items / Funding	Verify that the amounts in Ship To Value and Obligated are correct.	The Obligated Amount will equal the amount you are obligating against this accounting line for this action.
37.	Items / Funding	Click the **Text** link on the left-hand menu.	The **Ship To Value** will equal the Award TEC. USAID is not currently using these links on the left-hand menu: • **Discount** • **Warranty**

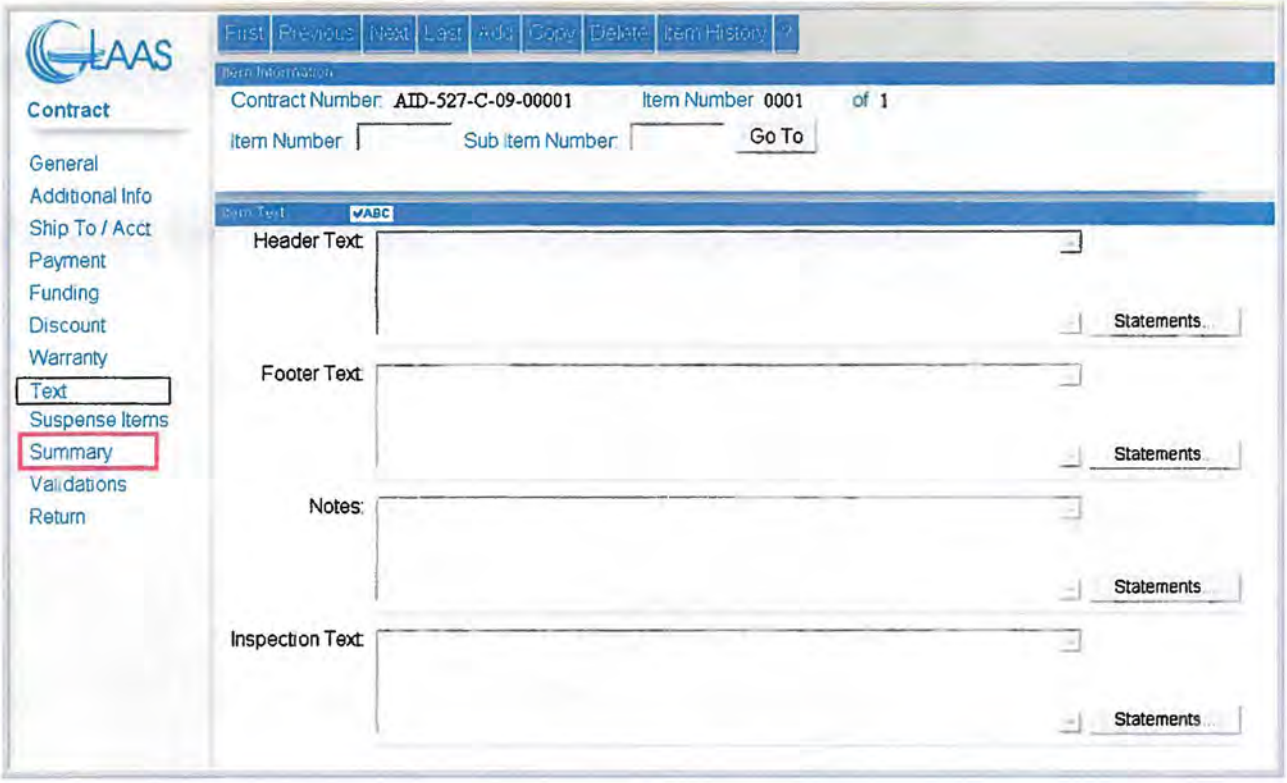


Figure 33: Items / Text Screen

Steps	Section	User Action	Guidance
38.	Items / Text	Complete the following Required (R) and/or Optional (O) fields: **Header Text:** Enter text that is only applicable to this line item. It will print out above the current item on the Contract. — O **Footer Text:** Enter text that is only applicable to this line item. It will print out below the current item on the Contract. — O **Notes:** Enter text that is for internal purposes only. It will not print on the Contract. — O	USAID is not currently using the **Inspection Text** field. Delete any text that should not be viewed by external audiences, such as CLIN Total Estimated Amounts.
39.	Items / Text	Click the **Summary** link on the left-hand menu.	USAID is not currently using the **Suspense Items** link on the left-hand menu.

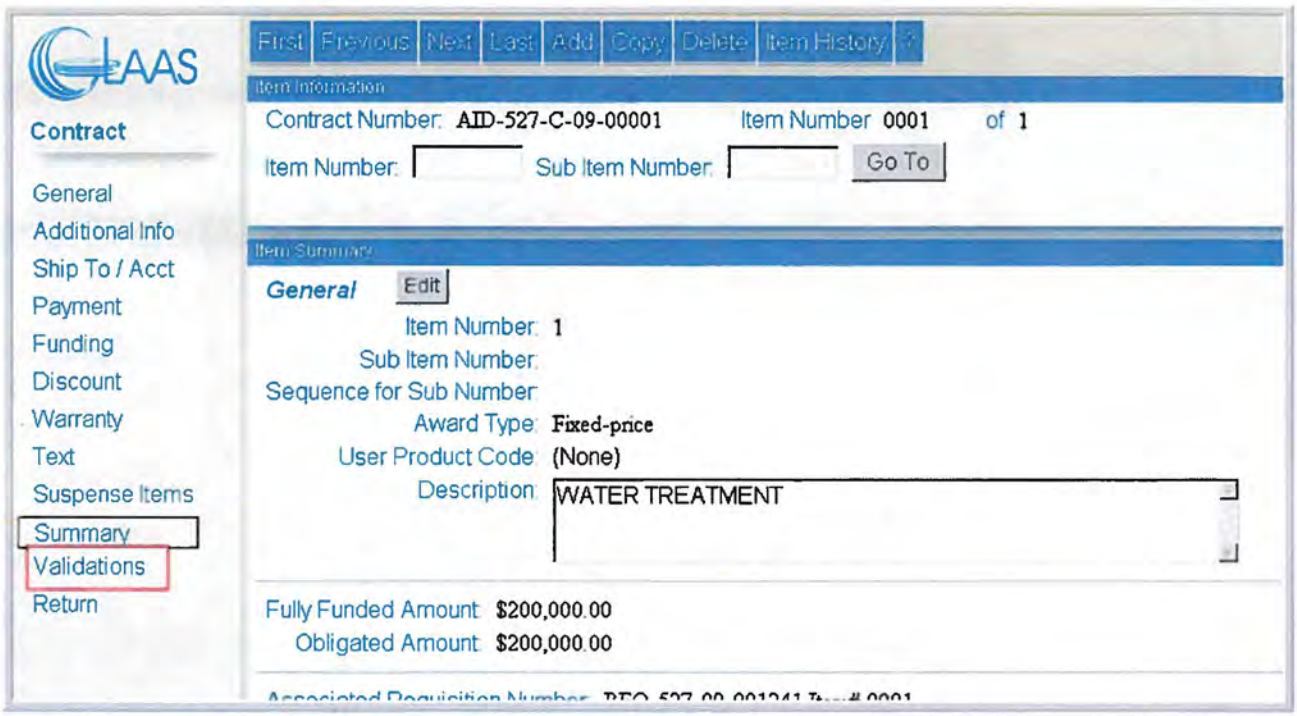


Figure 34: Items / Summary Screen

Steps	Section	User Action	Guidance
40.	Items / Summary	Review the information on this screen for accuracy.	Click the various **Edit** buttons (Edit) to make any changes.
41.	Items / Summary	Click the **Validations** link on the left-hand menu.	

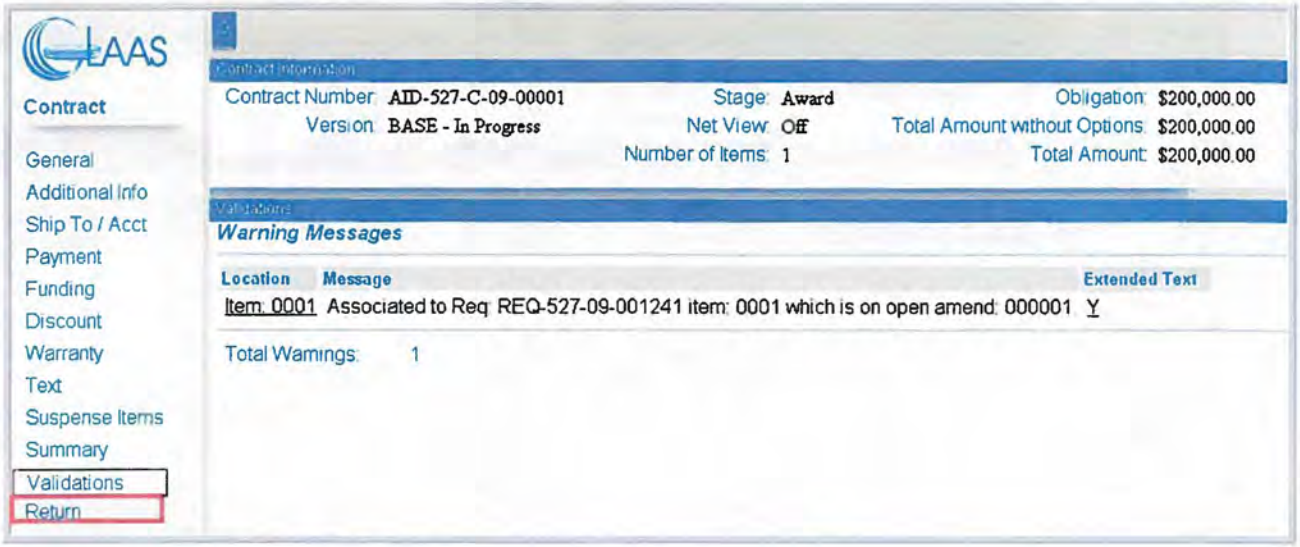


Figure 35: Items / Validations Screen

Steps	Section	User Action	Guidance
42.	Items / Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item.	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
43.	Items / Validations	Click the **Return** link on the left-hand menu.	

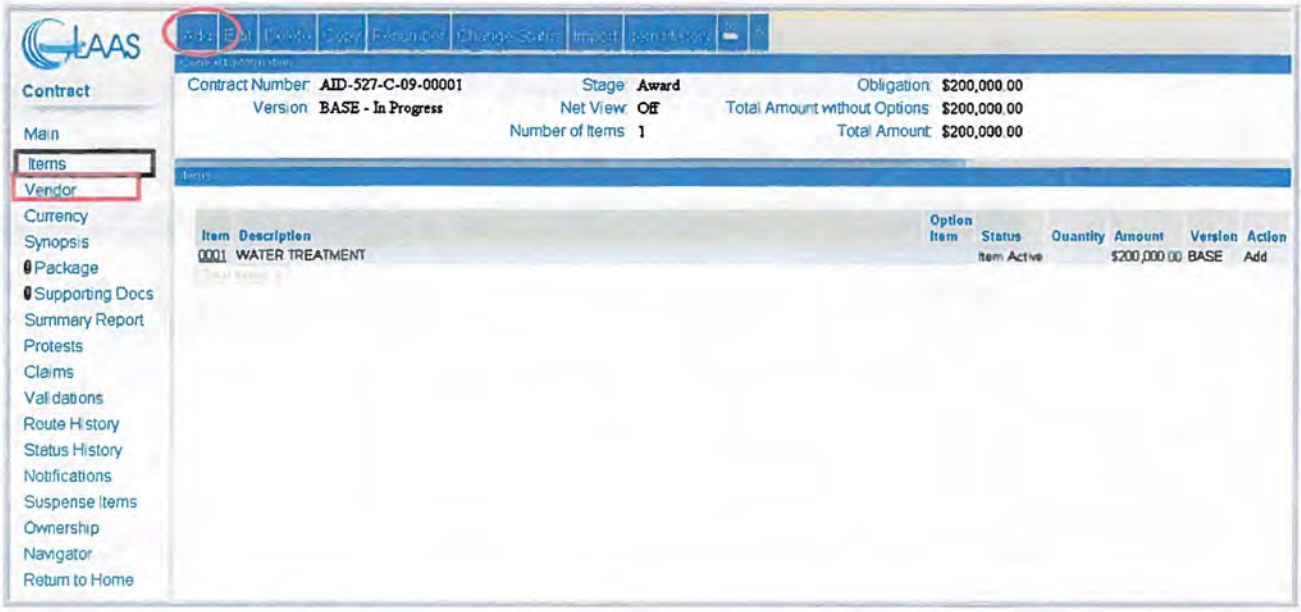


Figure 36: Items Screen

Steps	Section	User Action	Guidance
44.	Items	Click the **Add** toolbar button and repeat **Steps 22-43**, if you need to add additional CLINs. OR Skip to **Step 45** if not adding a new CLIN.	The system will ask you to choose how you want to add the item: • **From Requisition** • **From Solicitation** • **New** • **Duplicate Existing Contract**
45.	Items	Click the **Vendor** link on the left-hand menu.	

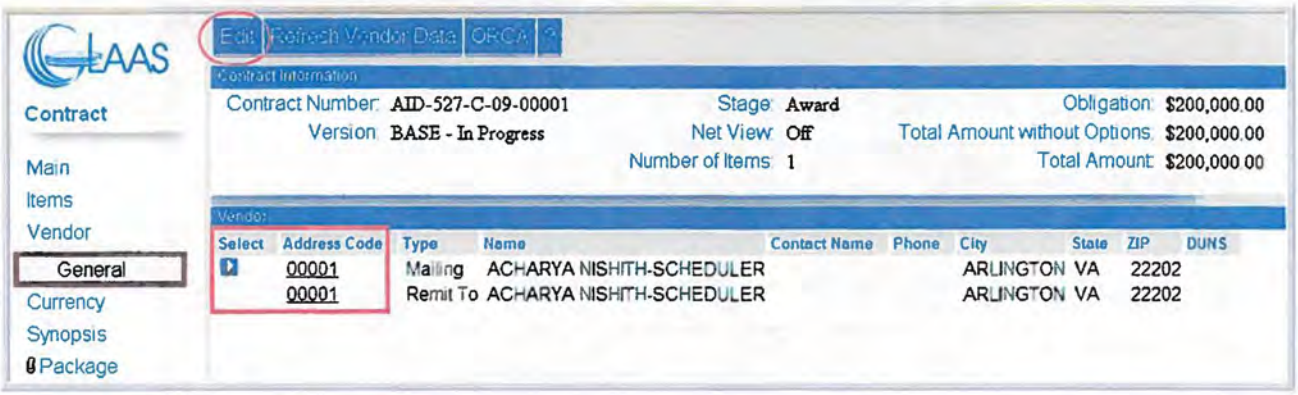


Figure 37: Vendor / General Screen

Steps	Section	User Action	Guidance
46.	Vendor / General	Click an **Address Code** link. OR Select the Address and click the **Edit** toolbar button.	

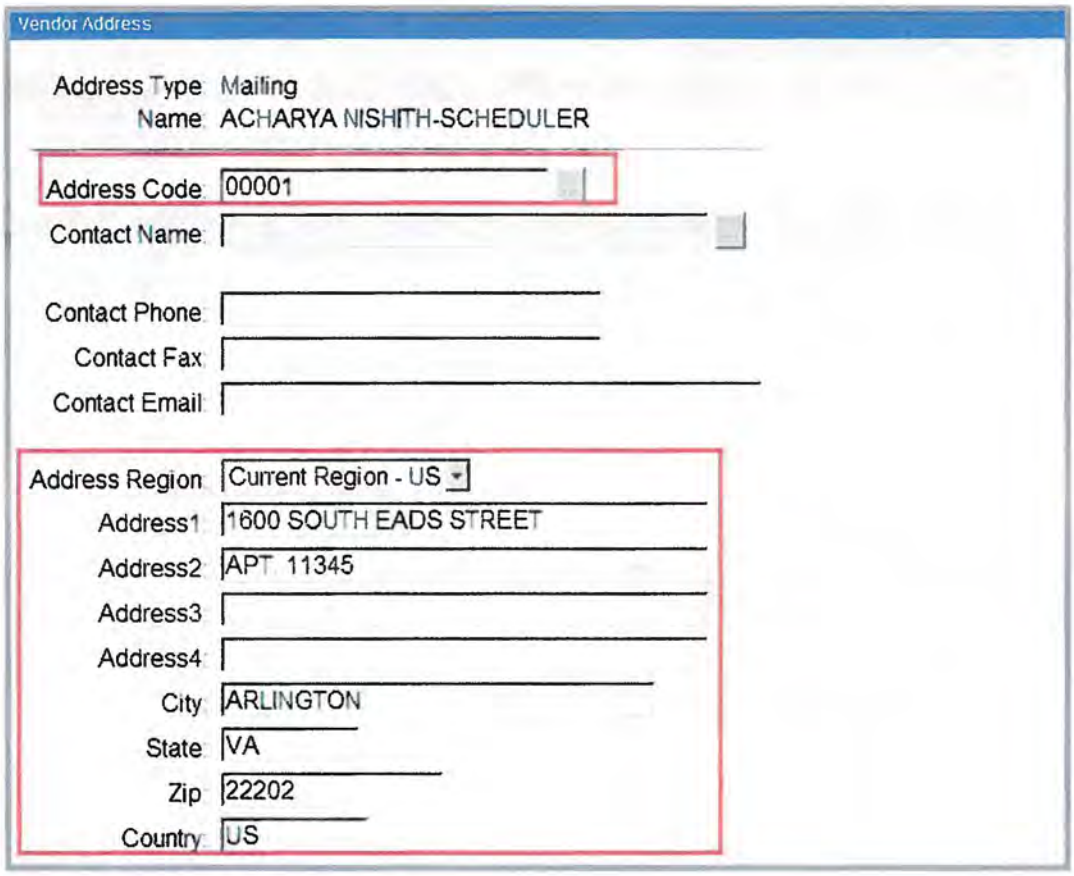


Figure 38: Vendor Address Screen

Steps	Section	User Action	Guidance
47.	Vendor Address	Verify that the **Address Code** is associated with the correct address for the vendor. Click the **Cancel** button (not shown) if this is the correct address and Address Code, and then proceed to **Step 52**.	
48.	Vendor Address	Click the lookup button ( ) next to the **Address Code** field to search for the correct Vendor Address Code.	

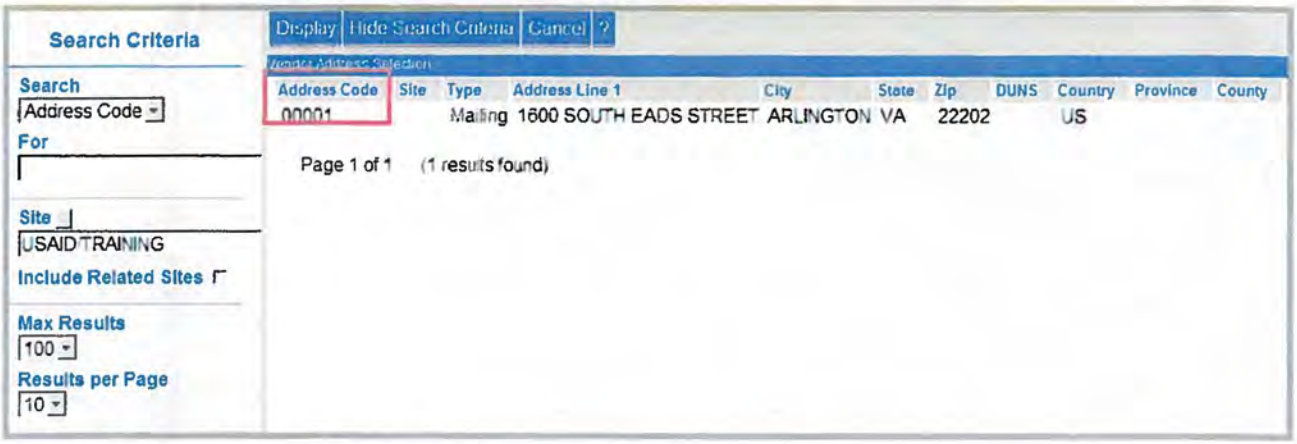


Figure 39: Vendor Address Screen

Steps	Section	User Action	Guidance
49.	Vendor Address Selection	Click the correct **Address Code** link for the **Address Type**.	Phoenix vendors will have different address codes for: • Physical addresses • Bank accounts • Currency codes Select an address code beginning with "000" or "001" to pick a US Dollar vendor address. Select another appropriate address code for non-US Dollar awards.

Vendor Address

Address Type: Mailing
Name: ACHARYA NISHITH-SCHEDULER

Address Code: 00001
Contact Name:

Contact Phone:
Contact Fax:
Contact Email:

Address Region: Current Region - US
Address1: 1600 SOUTH EADS STREET
Address2: APT. 11345
Address3:
Address4:
City: ARLINGTON
State: VA
Zip: 22202
Country: US

Figure 40: Vendor Address Screen

Steps	Section	User Action	Guidance
50.	Vendor Address	Complete the following Required (R) and/or Optional (O) fields: **Contact Name:** Type the Vendor Point of Contact's name, if available. — O **Contact Phone:** Enter the vendor's phone number, if available. — O **Contact Fax:** Enter the vendor's fax number, if available. — O **Contact Email:** Enter a vendor contact email, if available. — O	Information entered here will not update the Phoenix record.
51.	Vendor Address	Click the **Submit** button (not shown).	

Figure 41: Vendor / General Screen

Steps	Section	User Action	Guidance
52.	Vendor / General	Click the **Currency** link on the left-hand menu.	

Figure 42: Currency Screen

Steps	Section	User Action	Guidance
53.	Currency	Click the **Add** toolbar button.	GLAAS documents include **Base Currency** and **Print Currency**. The Award will be printed in the **Print Currency**. This will default from the Requisition, but can be changed if needed.

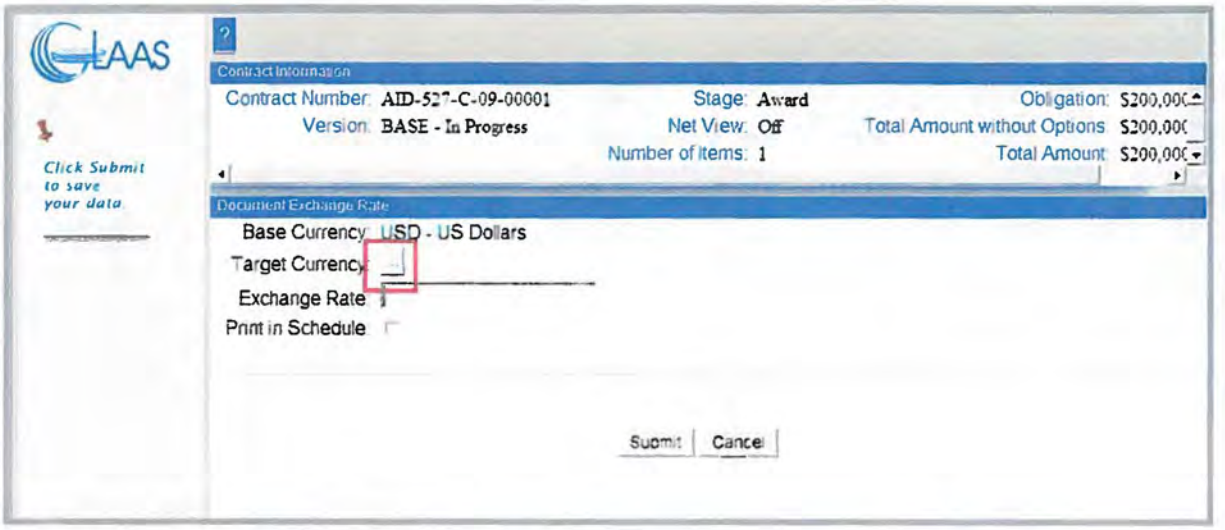


Figure 43: Document Exchange Rate Screen

Steps	Section	User Action	Guidance
54.	Document Exchange Rate	Click the lookup button (...) next to **Target Currency** to select the currency you wish to add to this document.	

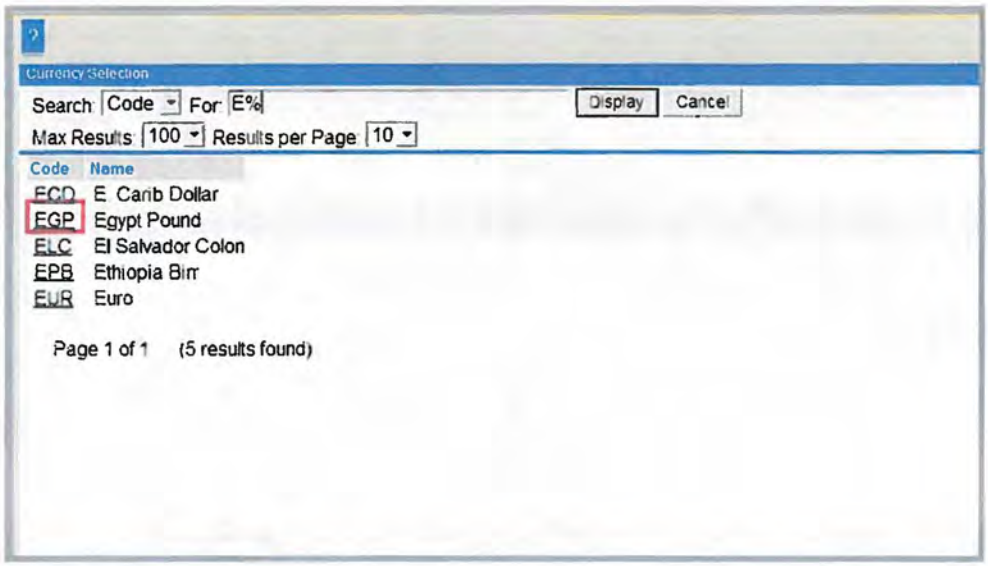


Figure 44: Currency Selection Screen

Steps	Section	User Action	Guidance
55.	Currency Selection	Search for a target currency and select the currency **Code** link.	

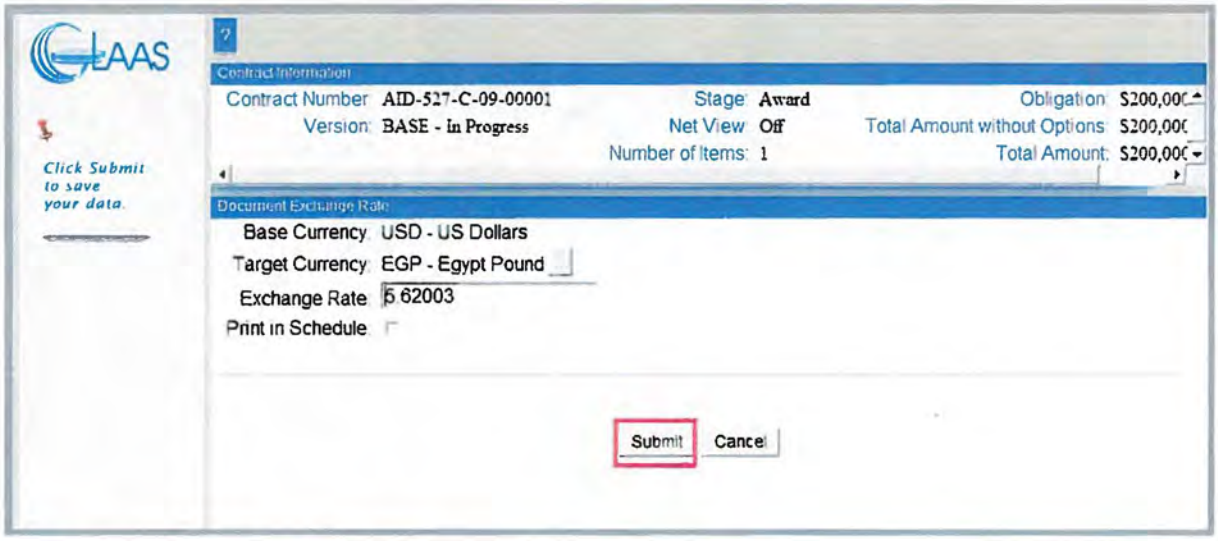


Figure 45: Document Exchange Rate

Steps	Section	User Action	Guidance
56.	Document Exchange Rate	Click the **Submit** button.	

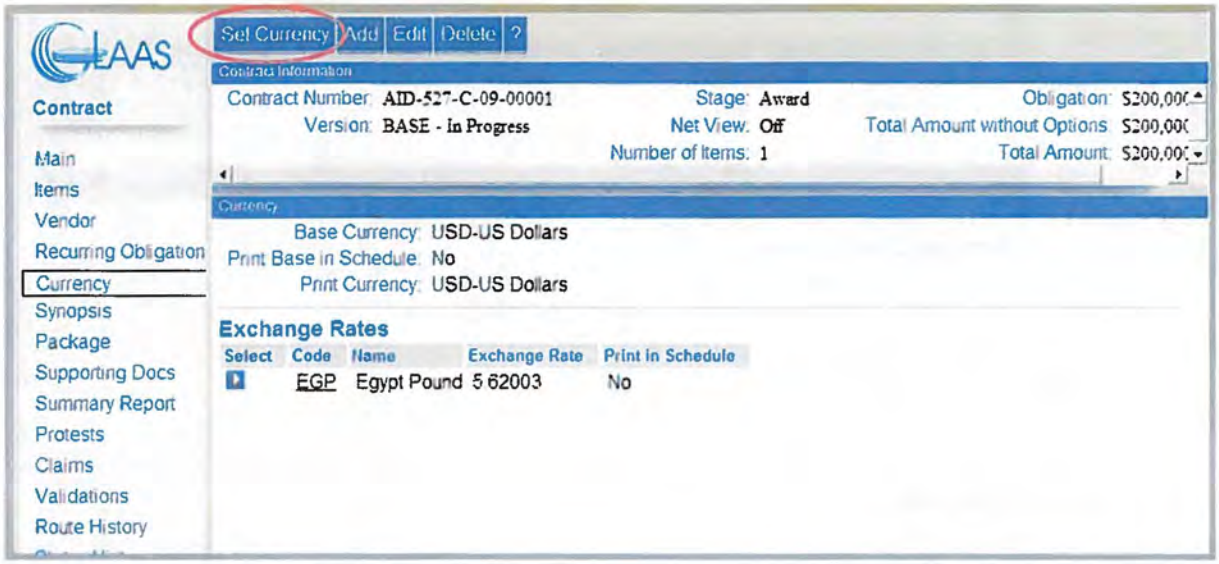


Figure 46: Currency Screen

Steps	Section	User Action	Guidance
57.	Currency	Click the **Set Currency** button.	

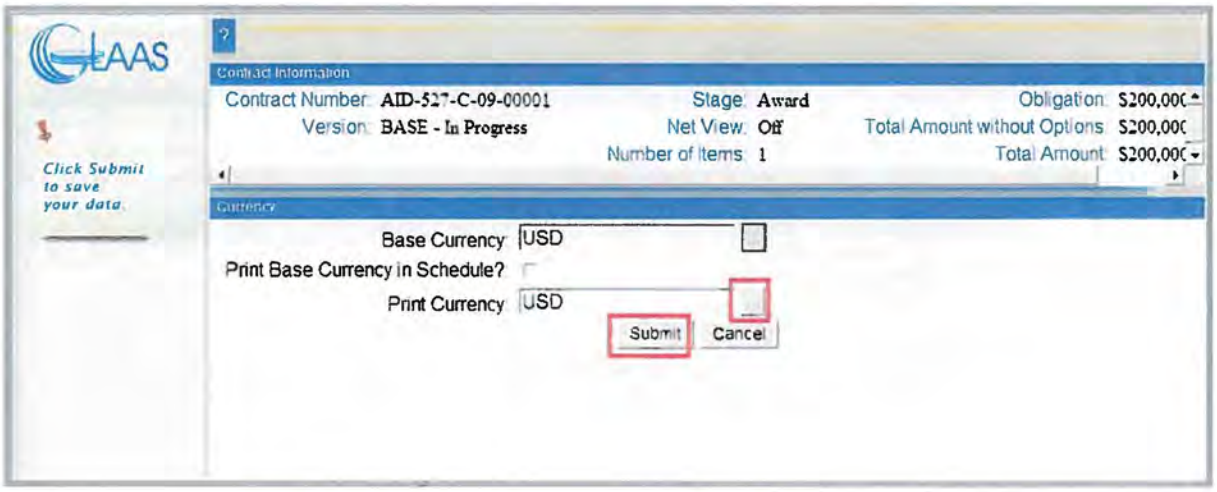


Figure 47: Currency Screen

Steps	Section	User Action	Guidance
58.	Currency	Click the lookup button ( ) next to **Print Currency**. Select the currency in which you want the Award printed. Click the **Submit** button.	**WARNING!** Do not change the **Base Currency** from the Requisition. The Requestor must amend the Requisition to de-commit the funds and create a new Requisition if this information Is not correct. USAID is not currently using the **Print Base Currency in Schedule** field.

Figure 48: Currency Screen

Steps	Section	User Action	Guidance
59.	Currency	Click the **Synopsis** link on the left-hand menu if you are required to submit an Award Notice to FedBizOpps (not shown). If you do not need to synopsize the award, proceed to **Step 64**.	You must have a FedBizOpps user ID and password in order to post a synopsis to FedBizOpps directly from GLAAS.

Figure 49: Synopsis Screen

Steps	Section	User Action	Guidance
60.	Synopsis	Click the **Add** toolbar button.	

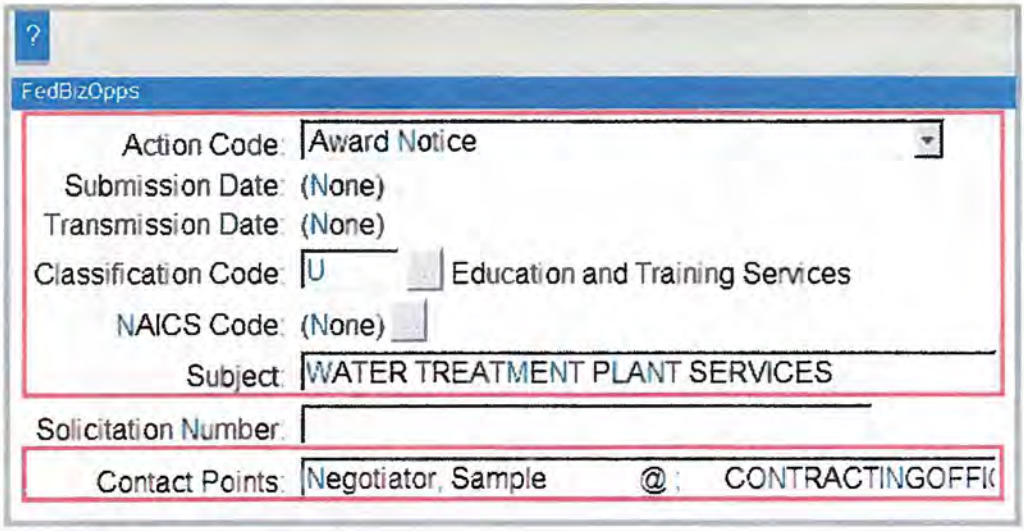


Figure 50: FedBizOpps Screen

Steps	Section	User Action		Guidance
61.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:		
		Action Code: Select the type of action for this synopsis.	R	
		Submission/Transmission Date: Will auto-fill when the synopsis is submitted for transmission.	R	
		Classification Code: An alphanumeric code used to categorize goods or services.	R	
		NAICS Code: Will auto-fill if selected on the **Main / General** screen.	R	
		Subject: Will auto-fill from the **Main / Text Header** field. Verify the text is appropriate for external audiences.	R	
		Solicitation Number: Enter the Solicitation number if one was used to award this contract.	O	
		Contact Points: Will auto-fill the Buyer's name from the **Main / General** screen.	R	

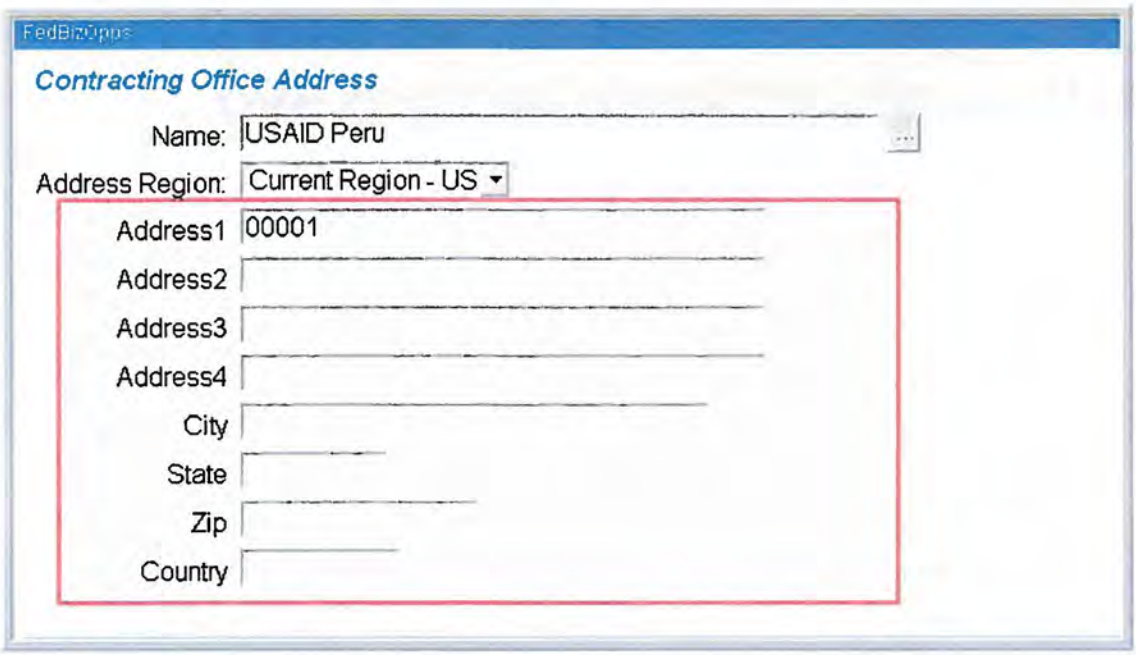


Figure 51: FedBizOpps Screen

Steps	Section	User Action	Guidance
61. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields: **Contracting Office Address:** Will auto-fill from the Issuing Office on the **Main / General** screen. — R	

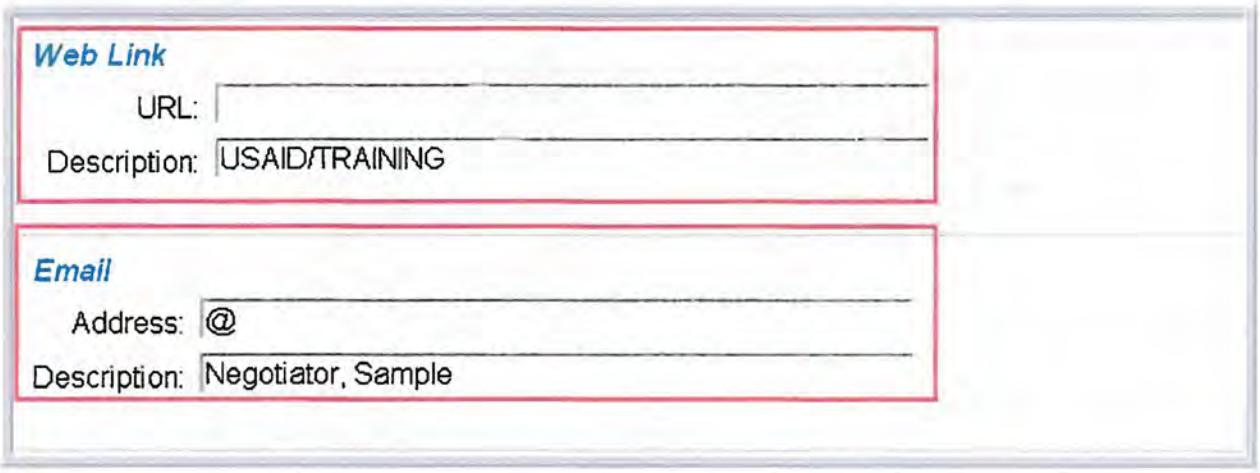


Figure 52: FedBizOpps Screen

Steps	Section	User Action		Guidance
61. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:		Since FedBizOpps does not allow you to send attached documentation through GLAAS even though there is a field for Attachments, you may include a webpage address in your synopsis to reference additional information.
		Web Link: Enter the **URL** of the website that gives additional information for this award. If you enter a **URL**, you must enter a **Description** that will become the title of the line.	R/O	
		Email: Enter the **Email Address** of the A&A Specialist for the award. If you enter an **Email Address**, you must type the A&A Specialist's name in the **Description** field.	R/O	

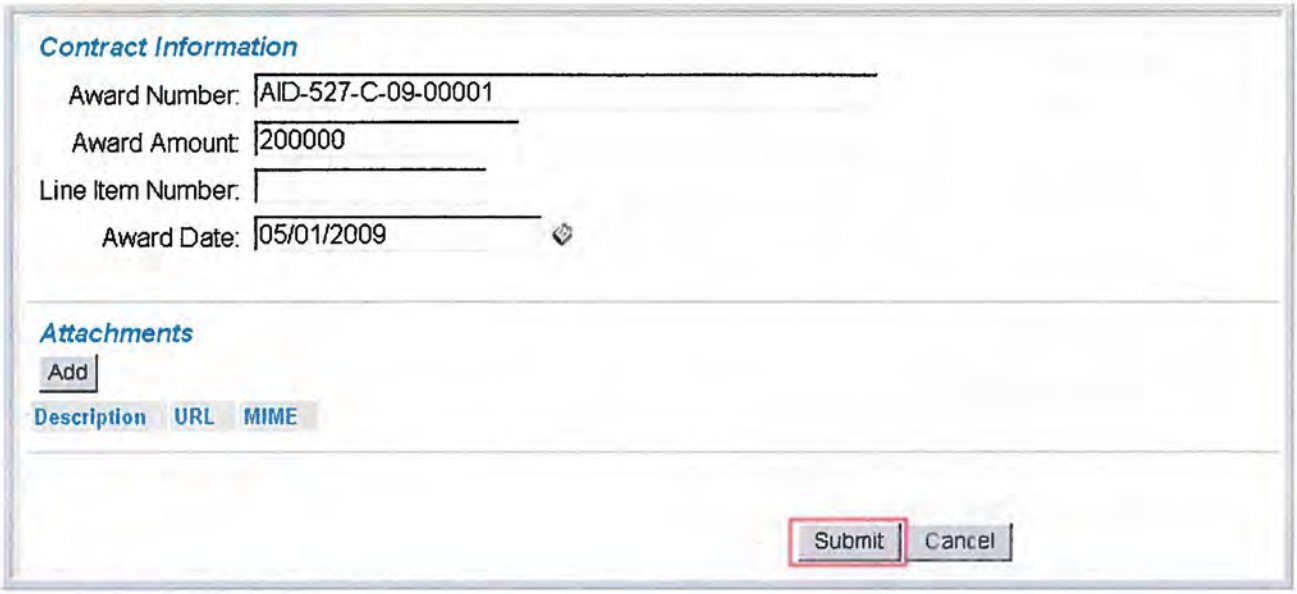


Figure 53: FedBizOpps Screen

Steps	Section	User Action	Guidance
62.	FedBizOpps	Click the **Submit** button.	GLAAS will auto-populate the **Contract Information** fields based on information entered in the Award and system defaults. You may edit these fields as needed or required.
63.	FedBizOpps	Click **No** when the screen to transmit to FedBizOpps pops up (not shown).	GLAAS will prompt you to enter a FedBizOpps user ID and password (not shown). The Contracting Officer will transmit the Award Notice after approving the contract.
64.	Synopsis	Click the **Package** link on the left-hand menu (not shown).	

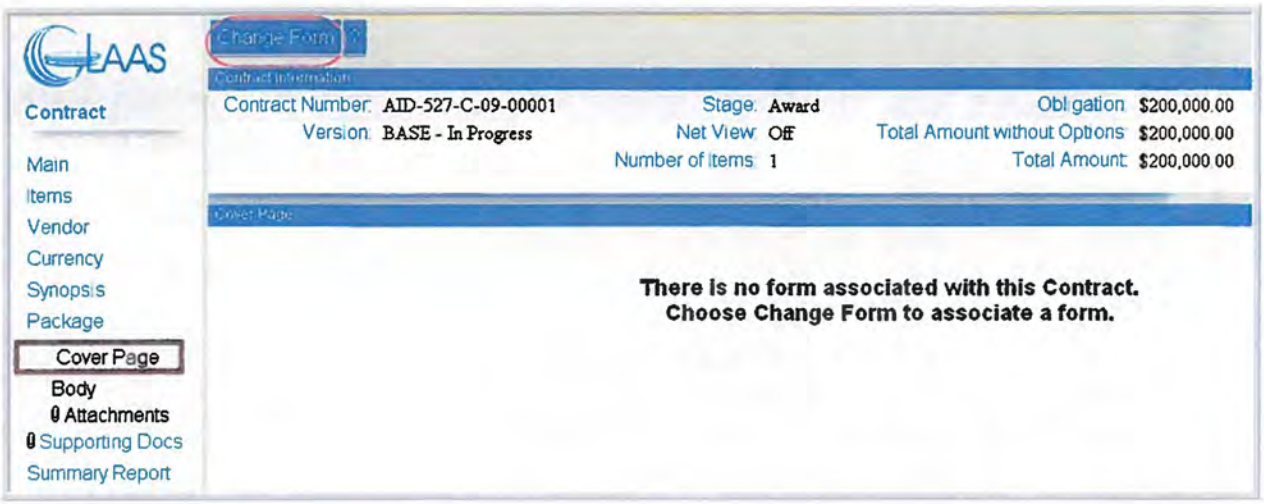


Figure 54: Package / Cover Page Screen

Steps	Section	User Action	Guidance
65.	Package / Cover Page	Click the **Change Form** toolbar button.	

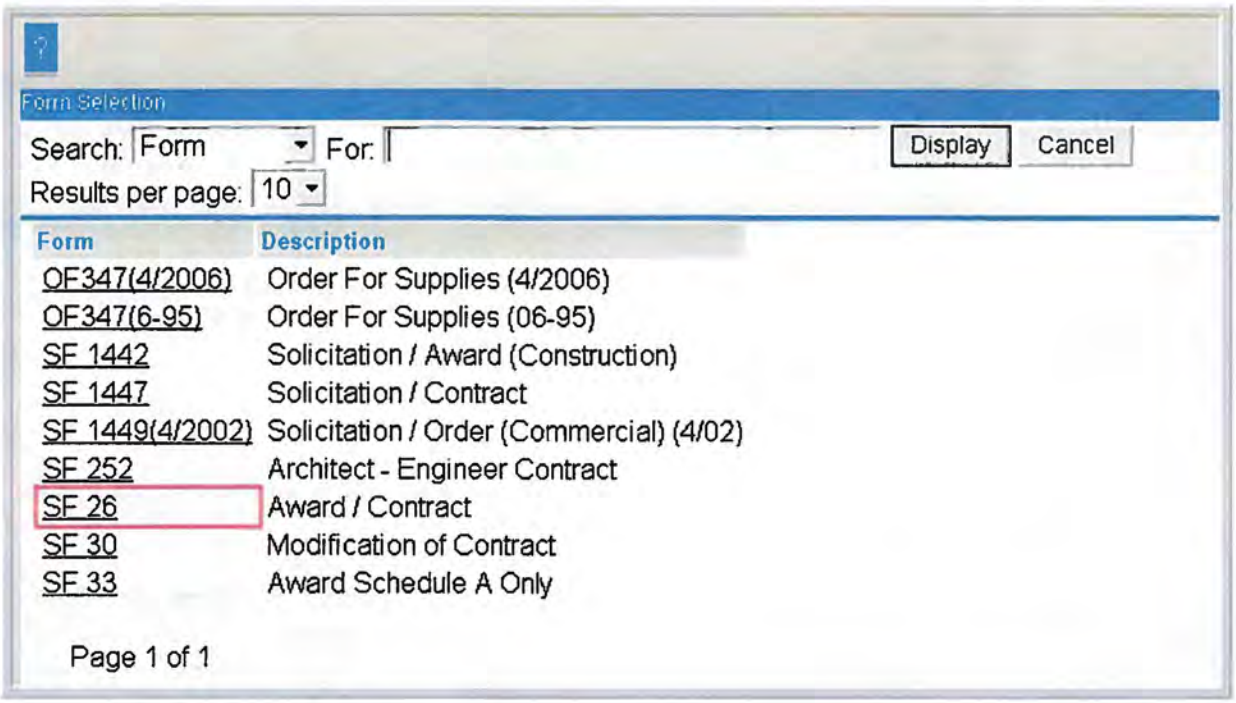


Figure 55: Form Selection Screen

Steps	Section	User Action	Guidance
66.	Form Selection	Click the **Form** link to select a Cover Page.	

Figure 56: Package / Cover Page Screen

Steps	Section	User Action	Guidance
67.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the Award Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
68.	Package / Cover Page	Click the **Body** link on the left-hand menu.	

Figure 57: Package / Body Screen

Steps	Section	User Action	Guidance
69.	Package / Body	Select the applicable FAR and AIDAR clauses.	The *Working with Clauses* user guide explains how to work with GLAAS Clause Templates in more detail. **WARNING!** GLAAS generates the package as a Rich Text Format (rtf) file; remember to convert your package to PDF before posting externally. You must add FAR clauses first, and then add AIDAR clauses. AIDAR templates always display "AIDAR" in the clause name.
70.	Package / Body	Click the **Attachments** link on the left-hand menu.	

Figure 58: Package / Attachments Screen

Steps	Section	User Action	Guidance
71.	Package / Attachments	Click the **Add** or **Library** toolbar button to add a document to the Award package (not shown). Modify an existing attachment by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any attachments from the Requisition will be pulled into the Award. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Once a document is added here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
72.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	

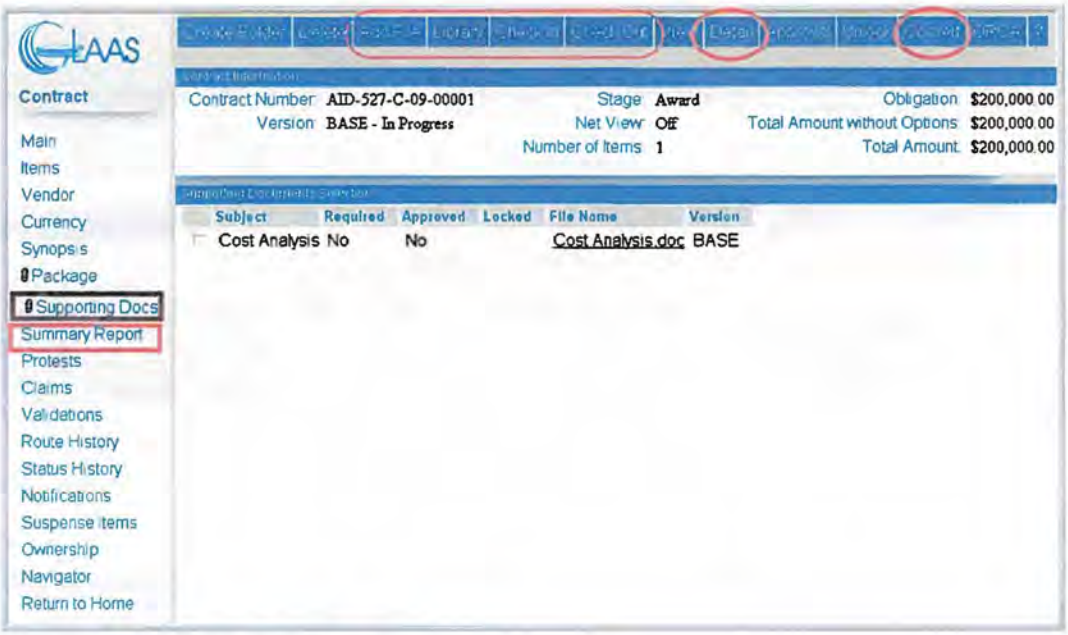


Figure 59: Supporting Docs Screen

Steps	Section	User Action	Guidance
73.	Supporting Docs	Click the **Add File** or **Library** toolbar button to add a supporting document to the Award package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any supporting documents from the Requisition will be pulled into the Award. The **Supporting Docs** screen contains documents for internal use that will not be sent to the vendor. Example: "Cost Analysis." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. To allow only users with "Full Access" to view supporting documents, click the **Detail** toolbar button and then check the **Confidential** box (not shown). Once a document is added here, you can use the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments**.
74.	Supporting Docs	Click the **Summary Report** link on the left-hand menu.	

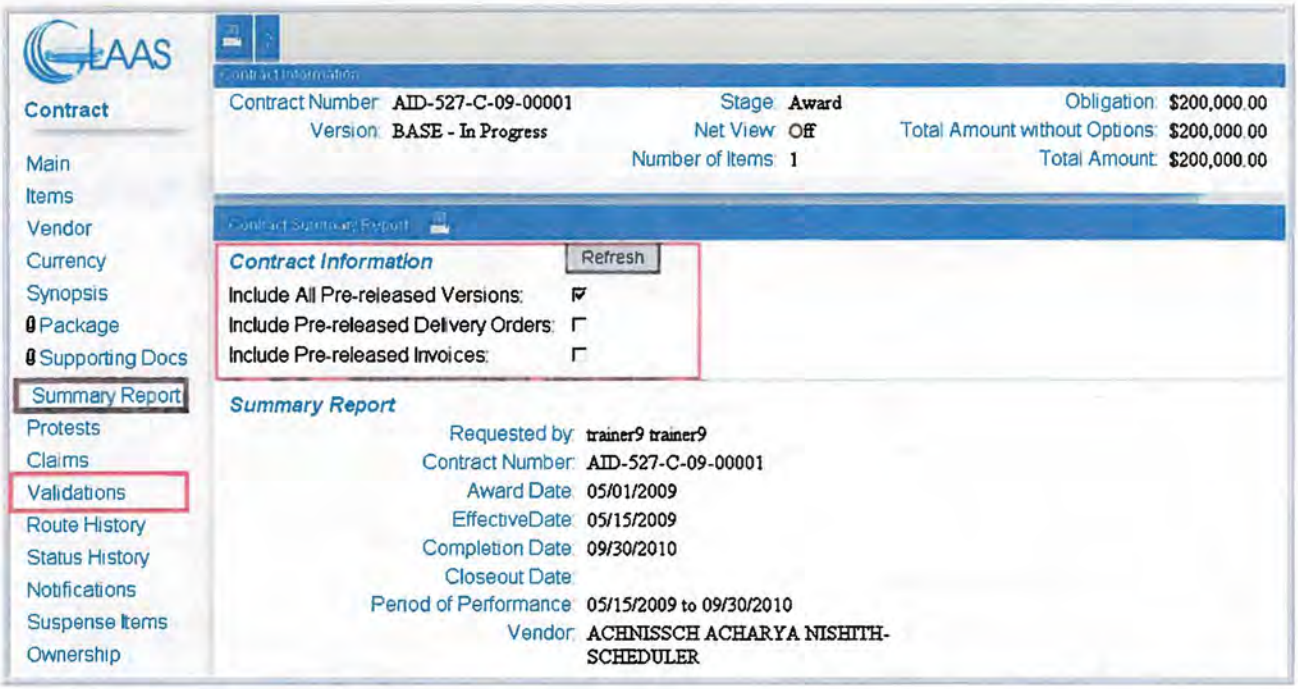


Figure 60: Summary Report Screen

Steps	Section	User Action	Guidance
75.	Summary Report	Review the Award information for accuracy.	The Contract **Summary Report** screen shows a high-level summary of the GLAAS Award. If changes need to be made, use the left-hand menu to go to the section which needs to be corrected. **Pre-released Versions** means multiple versions of the Contract. USAID is not currently using the **Include Pre-released Invoices** field.
76.	Summary Report	Click the **Validations** link on the left-hand menu.	The **Protests** and **Claims** links will contain any protest or claim that was recorded. Click either link to review and update existing protests and claims or you can add new protests and claims (not shown).

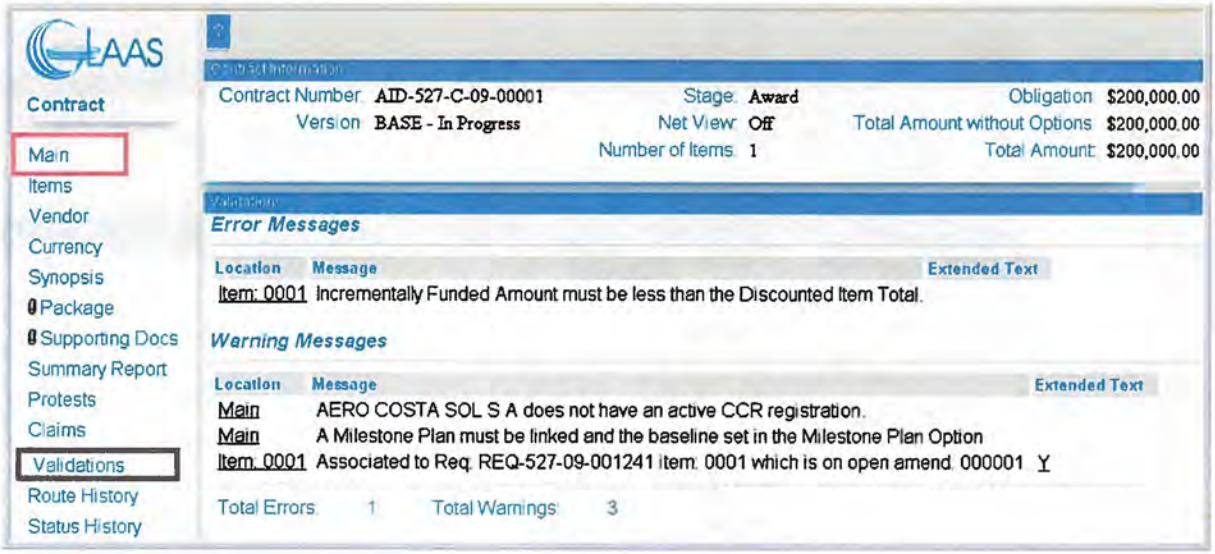


Figure 61: Validations Screen

Steps	Section	User Action	Guidance
77.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it. If there are no GLAAS errors, a popup window will appear asking for your Phoenix credentials to validate in Phoenix; enter your Phoenix User ID and Password.
78.	Validations	Click the **Main** link on the left-hand menu.	

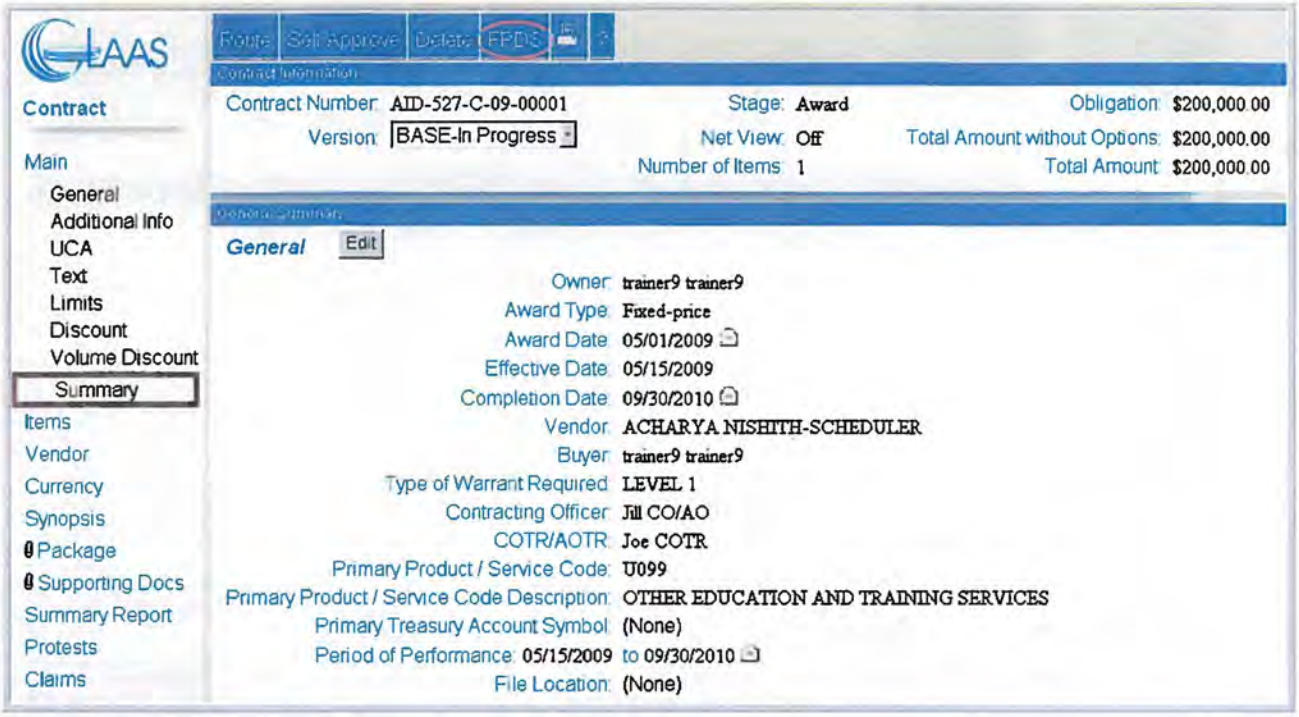


Figure 62: Main / General Screen

Steps	Section	User Action	Guidance
79.	Main / General	Click the **FPDS** toolbar button to edit the FPDS-NG record (not shown). Click the **Validate** button at the top of the FPDS-NG record window (not shown). Complete the required fields (not shown). Click the **Save** button and close the browser window (not shown).	The A&A Specialist is responsible for populating the FPDS-NG record. The Contracting Officer is responsible for approving the FPDS-NG record. The Award cannot be approved and released without a valid FPDS-NG record. Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for additional information about completing the FPDS-NG submission.
80.	Main / General	Click the **Route History** link on the left-hand menu (not shown).	

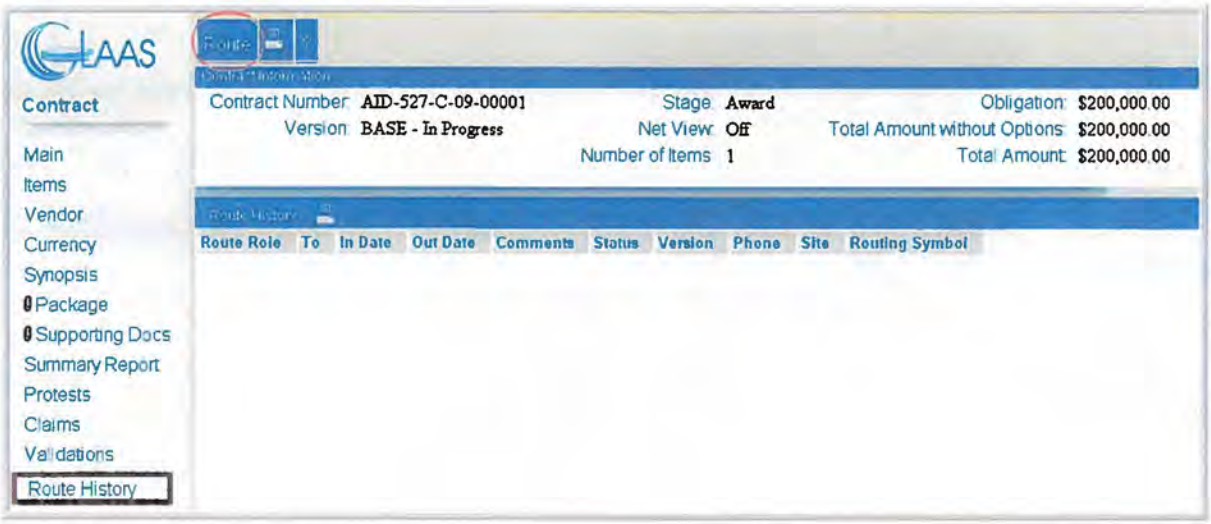


Figure 63: Route History Screen

Steps	Section	User Action	Guidance
81.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for **Approval** to the Contracting Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
82.	Route History	Click the **Return to Home** link on the left hand menu (not shown).	Remember to return to the Milestone Plan associated to this Award and update the appropriate steps.

After the Award has been approved and released by the CO, open the Award and complete the following steps giving the Admin Office access to the Award.

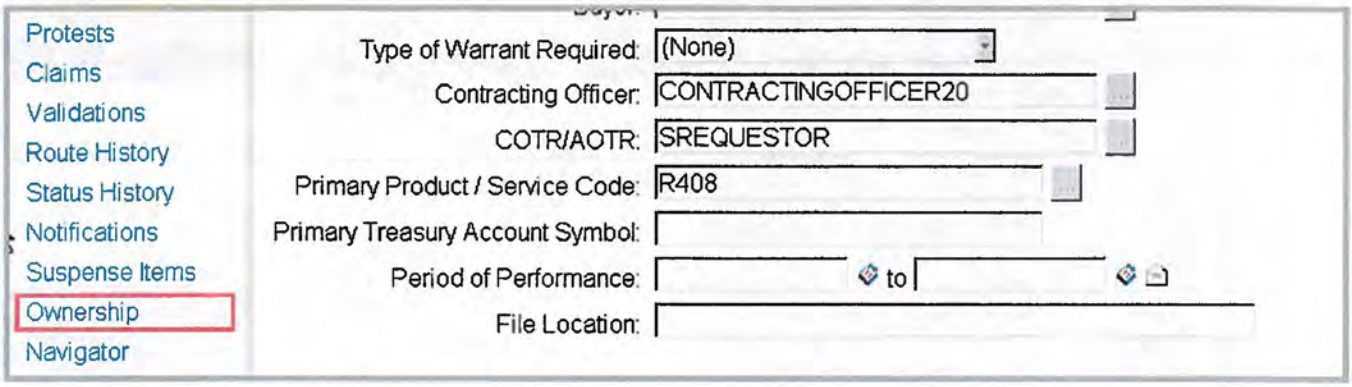


Figure 64: Main / General Screen

Steps	Section	User Action	Guidance
83.	Main / General	Click the **Ownership** link on the left-hand menu.	
84.	Share Document	Click the **Edit** toolbar button (not shown).	

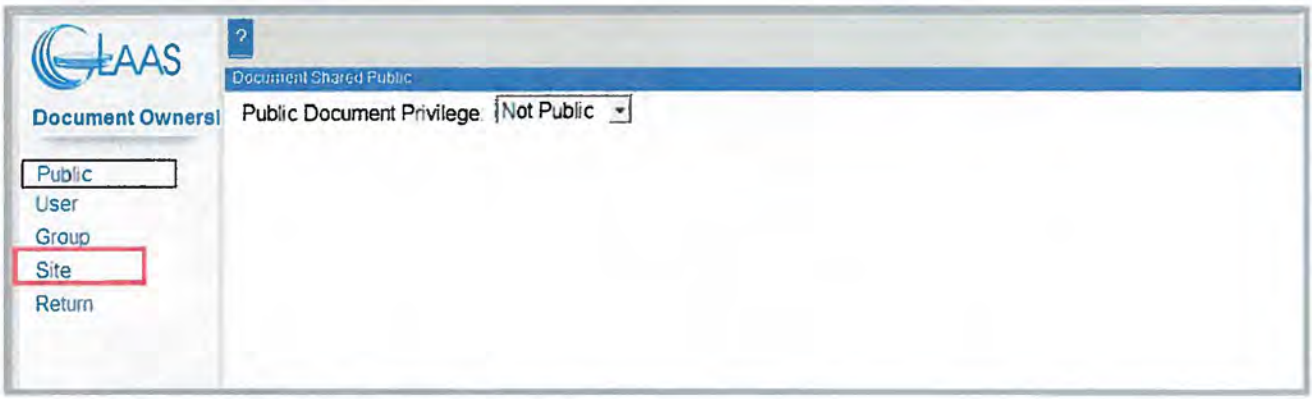


Figure 65: Document Ownership / Public Screen

Steps	Section	User Action	Guidance
85.	Document Ownership / Public	Click the **Site** link on the left-hand menu.	
86.	Document Ownership / Site	Click the **Add** toolbar button (not shown).	

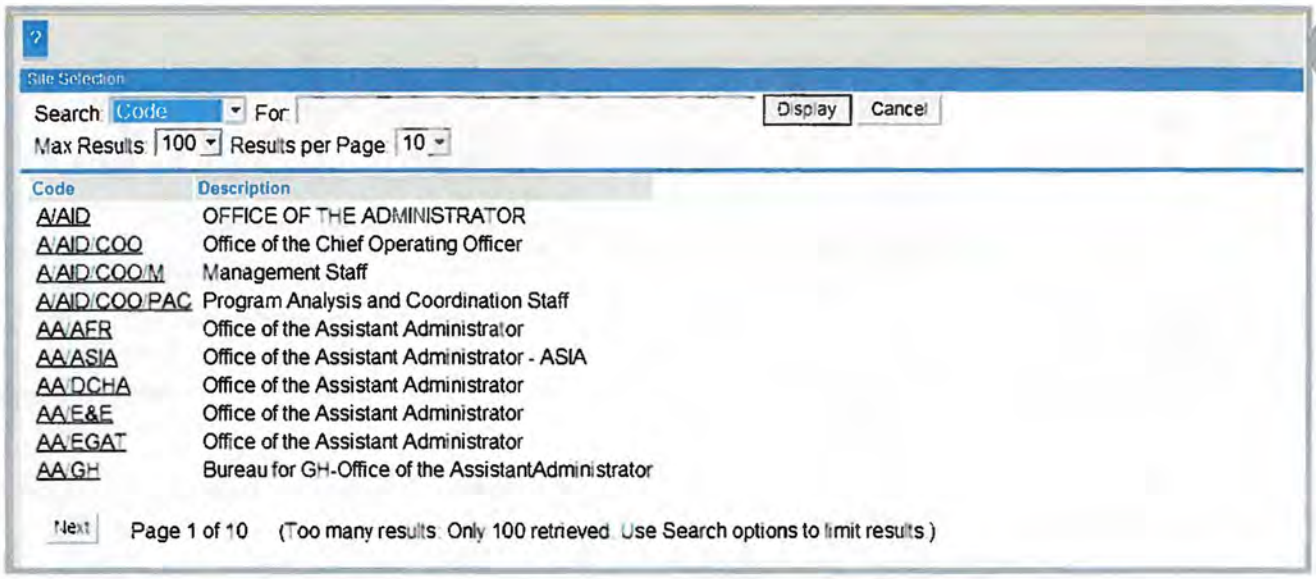


Figure 66: Site Selection Screen

Steps	Section	User Action	Guidance
87.	Site Selection	Search for and select the COTR's site.	This is the same as the **Admin Office** on the **Main / General** screen.

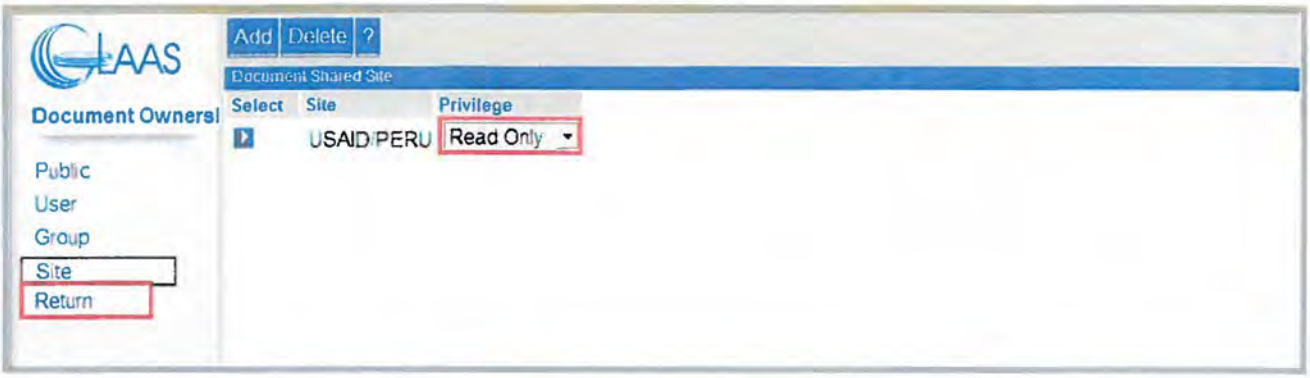


Figure 64: Document Ownership / Site Screen

Steps	Section	User Action	Guidance
88.	Document Ownership / Site	Ensure the **Privilege** is Read Only.	This will allow the **Admin Office** to view the released award.
89.	Document Ownership / Site	Click the **Return** link on the left-hand menu.	
90.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

GLAAS 102 USER GUIDE:

CREATING A CONTRACT FROM A GLAAS SOLICITATION

PURPOSE:

This user guide will show you how to create a Competitive Contract from a Solicitation in GLAAS. By creating the contract from the Solicitation, most of the information from the previous documents that were used to create the Solicitation will carry forward to the Contract, including the Vendor bid information.

BEFORE STARTING:

1. In order to create a Contract, you must be an A&A Specialist or Contracting Officer.
2. In order to approve or release a Contract, you must be a Contracting Officer.
3. A Milestone Plan has been created and linked to the Requisition.
4. You should have a Solicitation with the status of "Released."

STEPS:

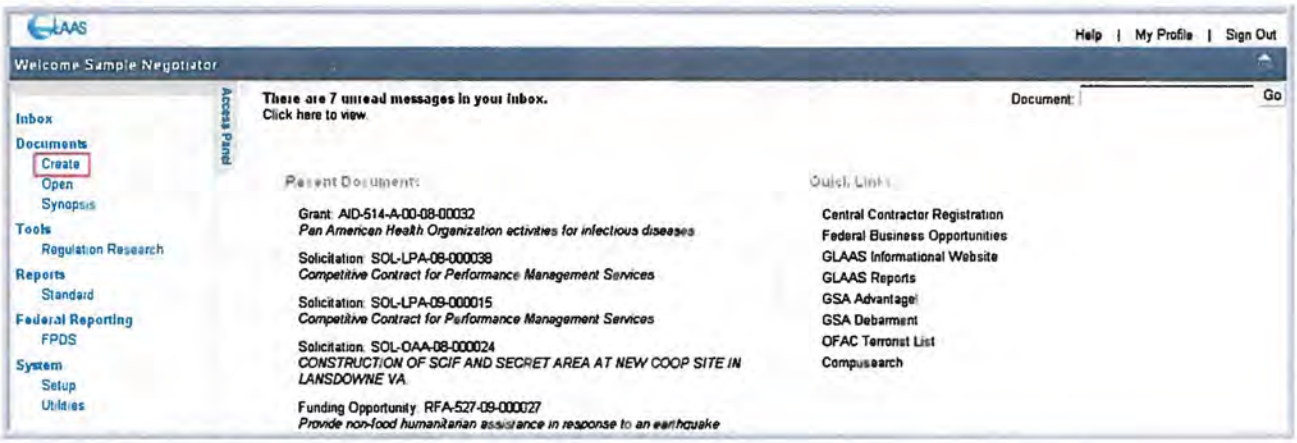


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel.**	

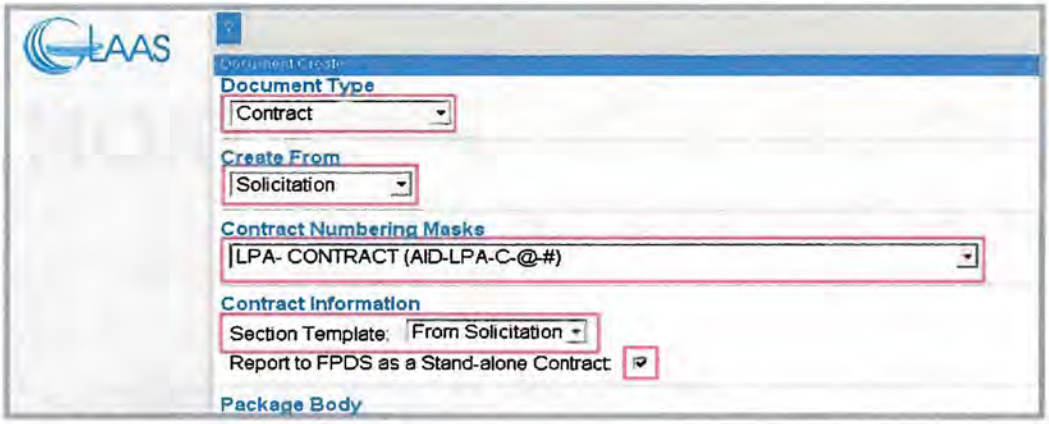


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Contract." • **Create From:** Select "Solicitation." • **Contract Numbering Mask:** Select a numbering mask. • **Section Template:** Select one of the following options: – **(None) –** No clause template is loaded. – **Select New –** Load a new clause template. – **From Solicitation –** Load the clause template from the Solicitation. • **Report to FPDS as a Stand-alone Contract:** By checking this box, you will be unable to issue Delivery/Task Orders against this Contract, such as an IQC.	Refer to the *Creating a Contract from a Requisition* user guide if you are creating a Contract from a Requisition without a Solicitation. Refer to the *Creating a Personal Service Contract (PSC)* user guide if you are creating a PSC. GLAAS uses different instrument codes for different types of contracts: • "B" = Basic Ordering Agreement • "C" = Contract • "D" = Definite Quantity Contract • "I" = Indefinite Quantity Contract • "Q" = Requirements Contract • "S" = Personal Services Contract • "Z" = Ribbon Contract (Buy-In) For instrument codes "S" and "C" you must check the **Report to FPDS as a Stand-alone Contract** box. If you want the Contract to use the same clauses as the Solicitation, but include updated versions, select "From Solicitation" for **Section Template**. All awards over $3,000 must be reported to the Federal Procurement Data System-Next Generation (FPDS-NG).

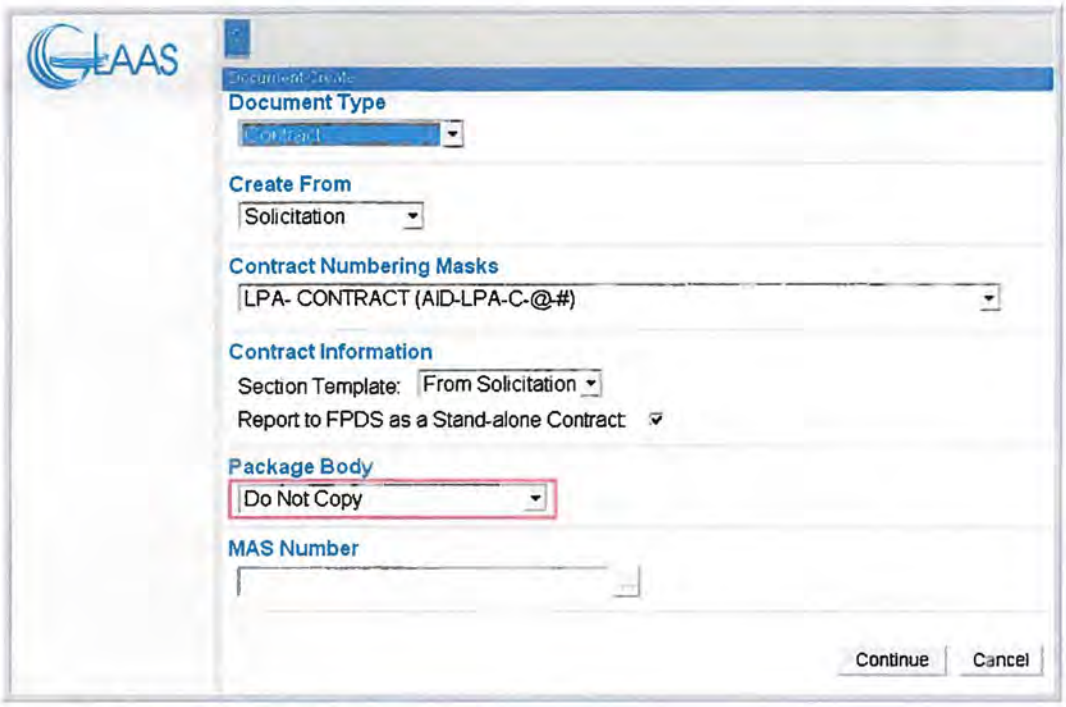


Figure 3: Document Create Screen

Steps	Section	User Action	Guidance
3. cont.	Document Create	Complete the following field: **Package Body**: Select one of the following options: • **Do Not Copy:** The package from the Solicitation is not copied. • **Copy as Package Body:** The package from the Solicitation is copied over as the Contract body. • **Copy as Attachment:** The package from the Solicitation is copied over as an Attachment. • **Copy as Supporting Document:** The package from the Solicitation is copied over as a Supporting Document.	If you want the clauses to match exactly as they were in the Solicitation, select "None" for **Section Template** and select "Copy as Package Body" for **Package Body**.

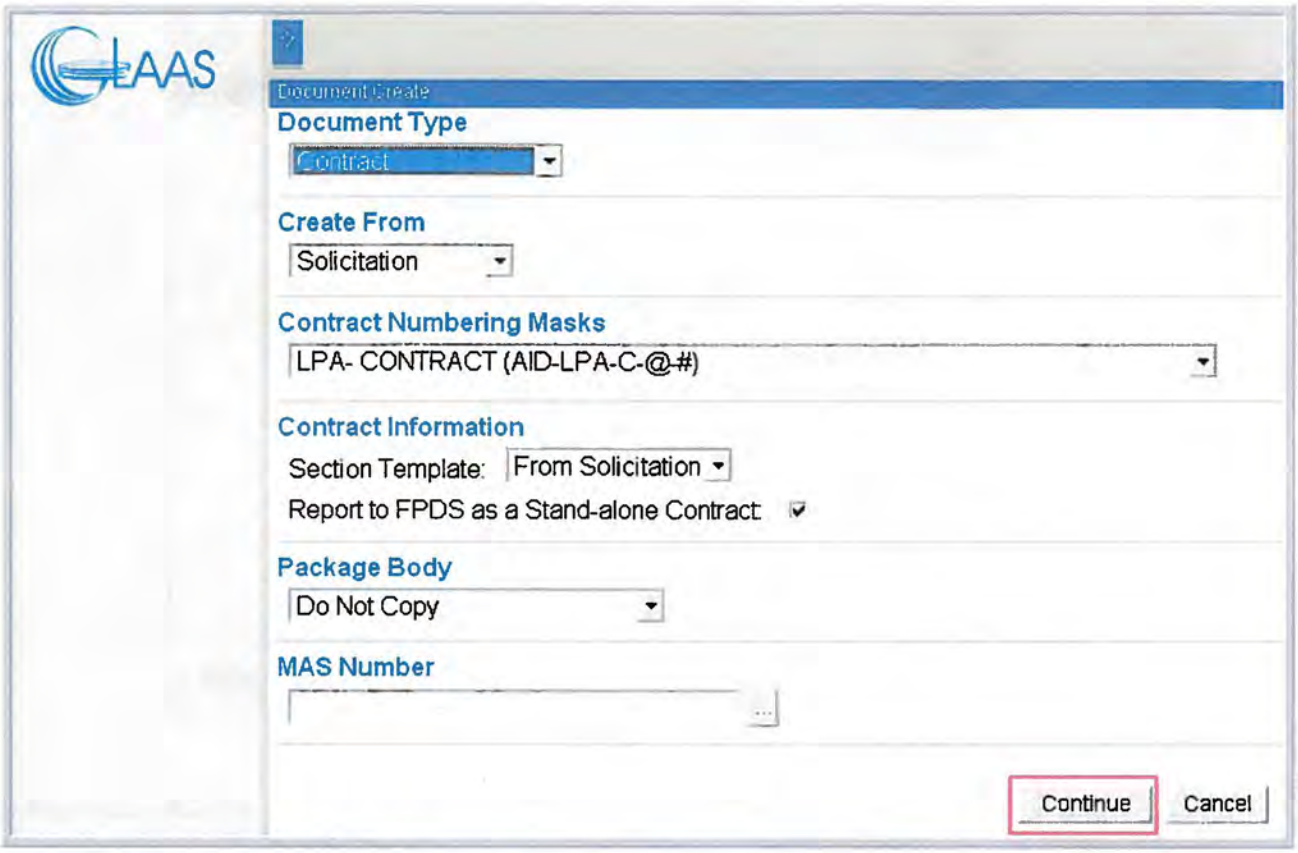


Figure 4: Document Create Screen

Steps	Section	User Action	Guidance
4.	Document Create	Click the **Continue** button.	IQC's under a Shared Ceiling will require the **MAS Number** field to be populated. This is the only page that you can link a Contract to a MAS document. If you fail to link the document here, you will have to delete the current award and start over.

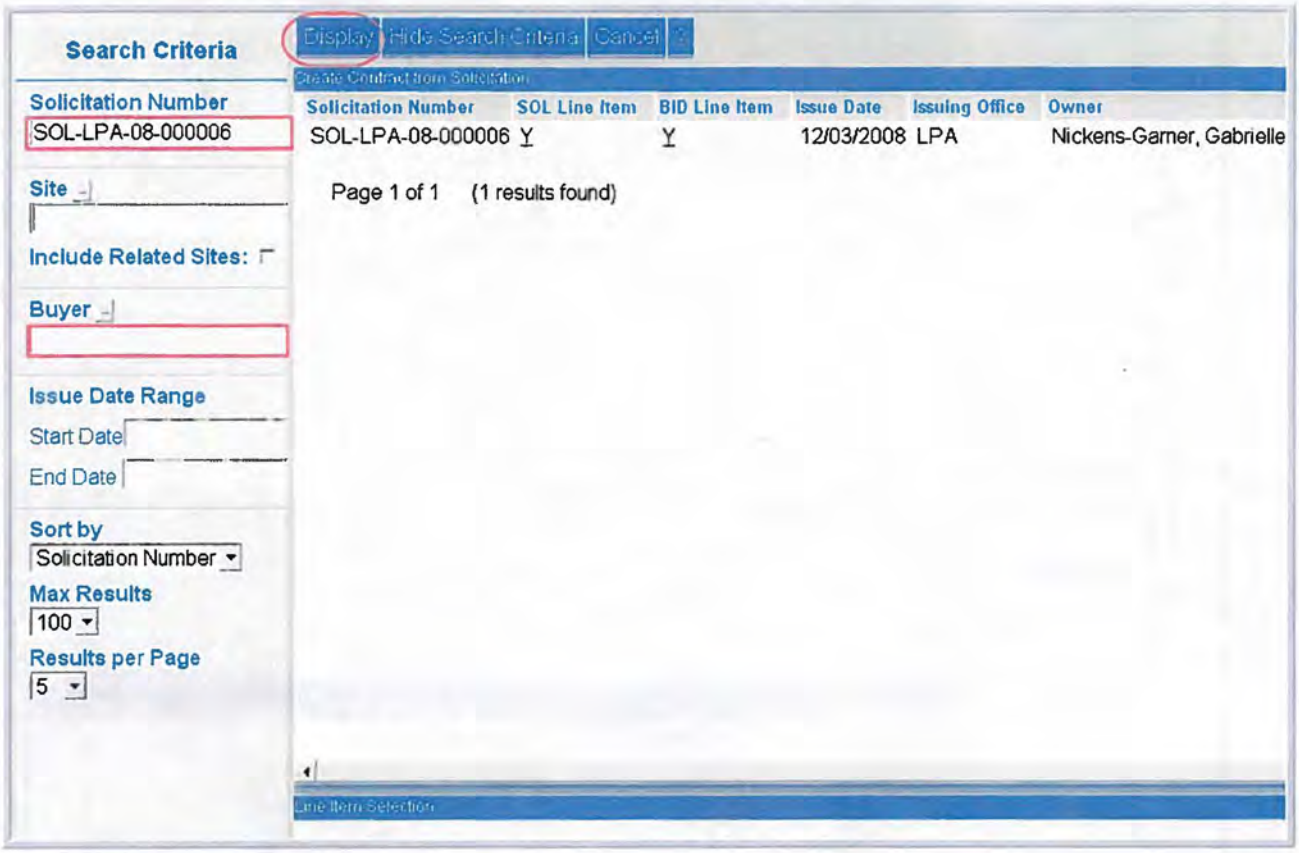


Figure 5: Create Contract from Solicitation Screen

Steps	Section	User Action	Guidance
5.	Create Contract from Solicitation	Search for the correct Solicitation using one or more of the following fields: • **Solicitation Number** • **Buyer** Click the **Display** toolbar button.	Only Solicitations with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.

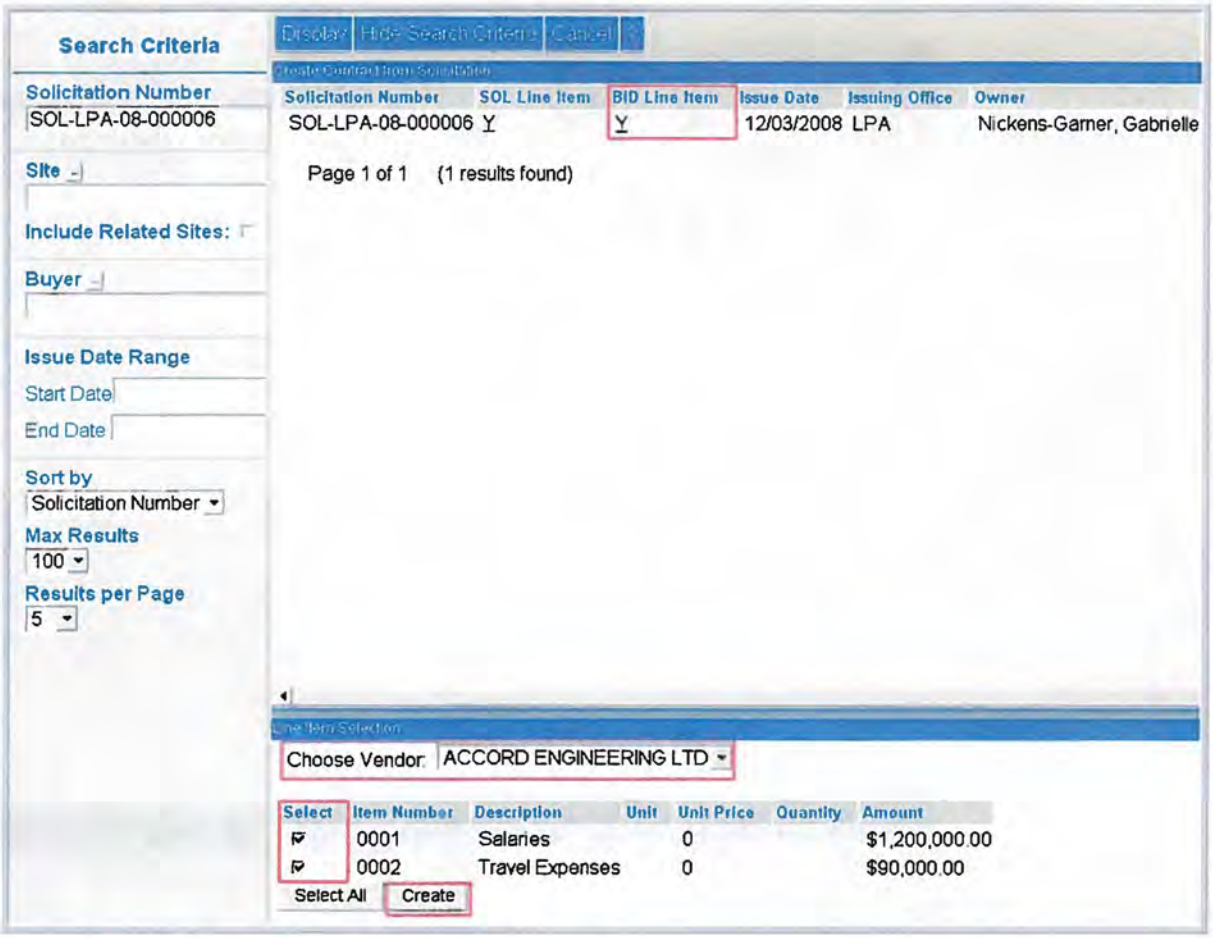


Figure 6: Create Contract from Solicitation Screen

Steps	Section	User Action	Guidance
6.	Create Contract from Solicitation	Click the **Y** link in the **BID Line Items** column to select a Vendor from the Solicitation. Select the winning Vendor from the **Choose Vendor** dropdown list. Select one or more line items to pull forward from the Solicitation into the Contract. Click the **Create** button to create the Contract.	If you select **BID Line Items** and then choose the Vendor, the bid amounts from that Vendor's responses will appear for selection (shown). OR If you select **SOL Line Items**, and then select the line items that appear at the bottom of the page, the system will only carry forward the estimated line items from the Solicitation (not shown). Using **SOL Line Items** will require you to enter Vendor information on the award.

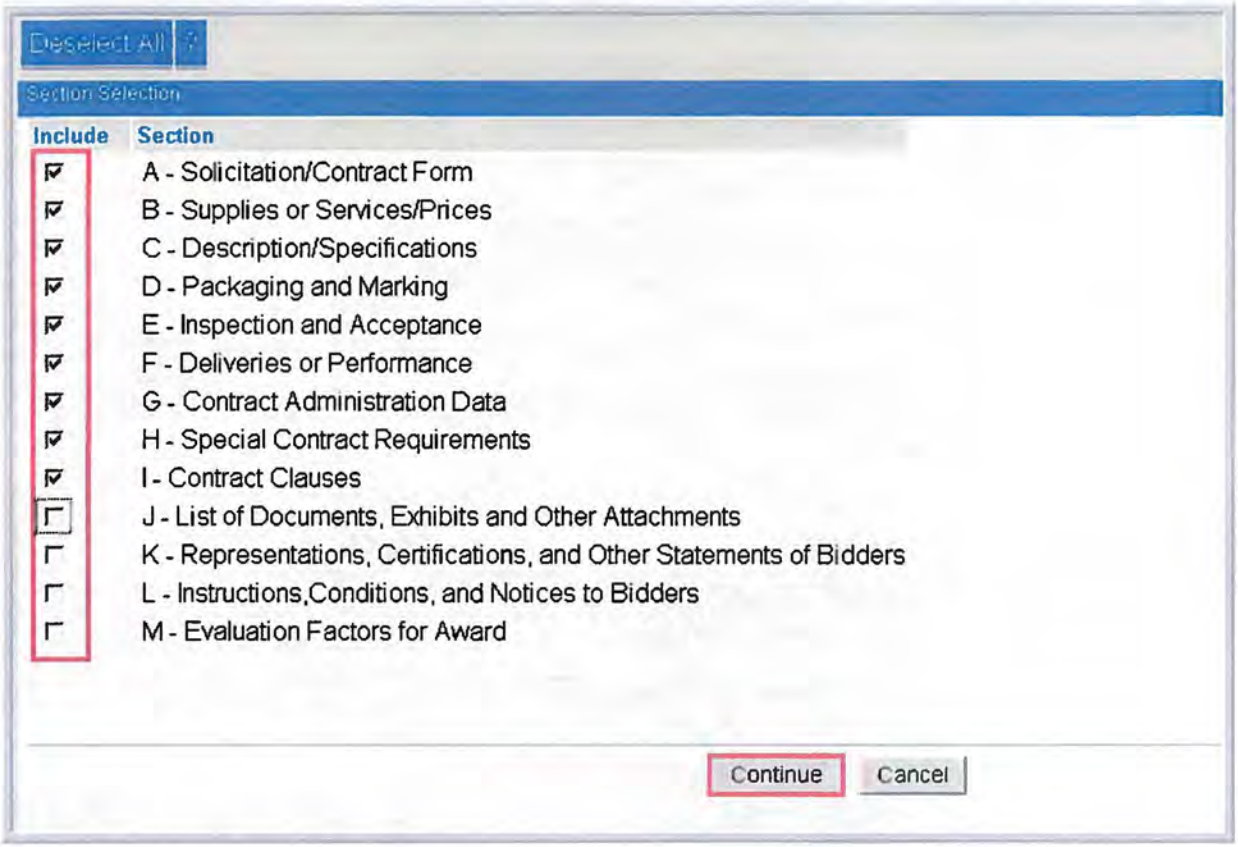


Figure 7: Section Selection Screen

Steps	Section	User Action	Guidance
7.	Section Selection	Check or uncheck the boxes to select clause sections you want to carry forward to the award. Click the **Continue** button.	By selecting the **Section**, you will copy all the clauses and **Fill In** values used in the Solicitation. The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS document.

Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
8.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Award Date:** Enter the date the Award is signed. — R **Award Type:** Select the main award type for this contract. — R **Effective Date:** Enter the Award's Period of Performance Start date. — R **Completion Date:** Enter the Award's Period of Performance End date. — R/O **Admin Office:** Select the code for the Contracting Officer Technical Representative's (COTR) office. — R	GLAAS will auto-populate several fields based on information entered in the Solicitation and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The **Award Type** selected here is reported to FPDS-NG.

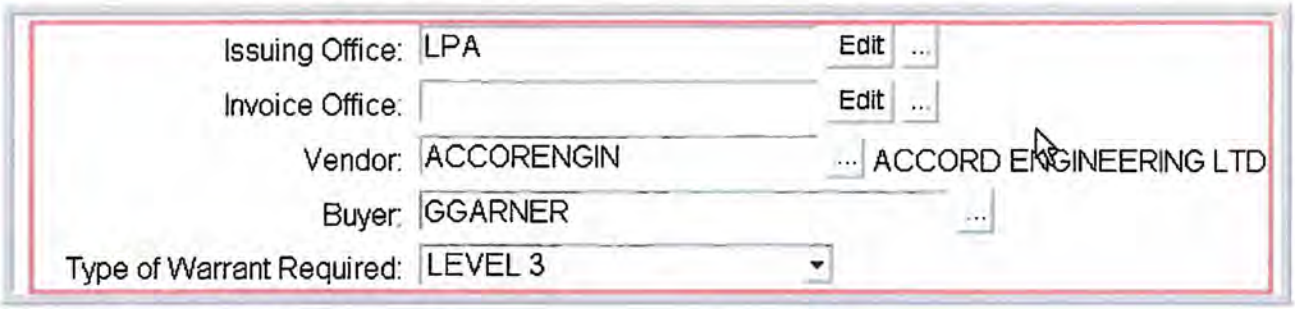


Figure 9: Main / General Screen

Steps	Section	User Action	Guidance
8. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Issuing Office:** Select the code for the contracting office. — R **Invoice Office:** Select the code for the office that receives the vendor invoices. — R **Vendor:** Select the Vendor code for this award. — R **Buyer:** Select the A&A Specialist for this award. — R **Type of Warrant Required:** Select a warrant level. — R	GLAAS will auto-populate several fields based on information entered in the Solicitation and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The warrant level is validated against the Award TEC. Vendors assigned one of three special DUNS numbers in Phoenix will have their Vendor Name obscured in FPDS-NG: • For a sensitive domestic contractor, assign DUNS 790238638. • For a sensitive foreign contractor, assign DUNS 790238851. • For a miscellaneous foreign contractor, assign DUNS 123456787.
9.	Main / General	Refer to the *Creating a Contract from a Requisition* user guide to finish creating this document.	

GLAAS 102 USER GUIDE:

CREATING A PERSONAL SERVICE CONTRACT (PSC)

PURPOSE:

This user guide will show you how to create a Personal Service Contract (PSC) from a Requisition. Creating a PSC is like creating a regular Contract except you: use a different numbering mask; use special "PSC" Clauses that include all of the FAR, AIDAR and AAPD/CIB/ADS language; and select a standard GLAAS cover page, but load a PSC form from the GLAAS Library as an Attachment.

BEFORE STARTING:

1. In order to create a PSC, you must be an A&A Specialist, Contracting Officer, or Executive Officer (EXO).
2. A Requisition must have been created, approved and released.
3. In order to approve or release a PSC, you must be a Contracting/Agreement Officer or EXO.

STEPS:

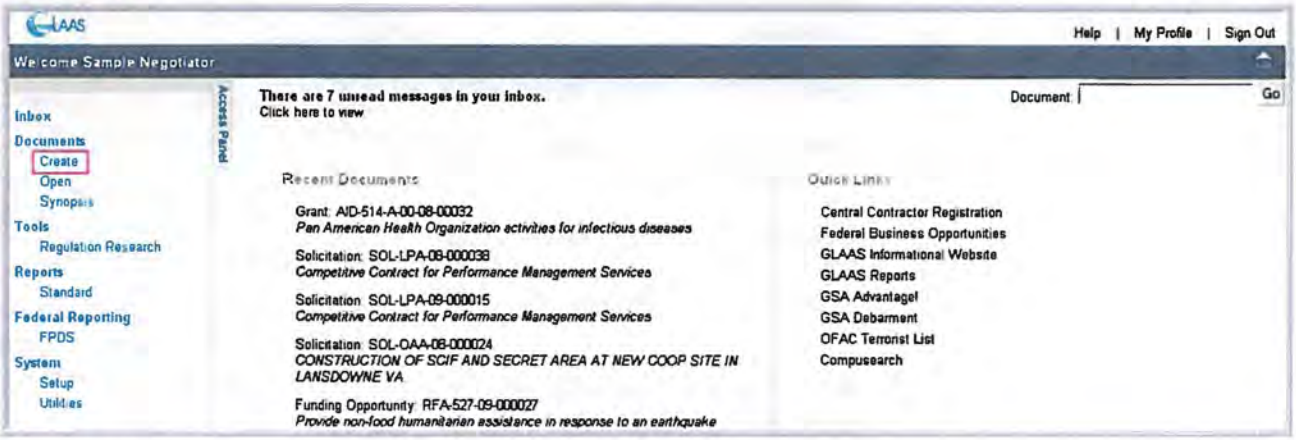


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

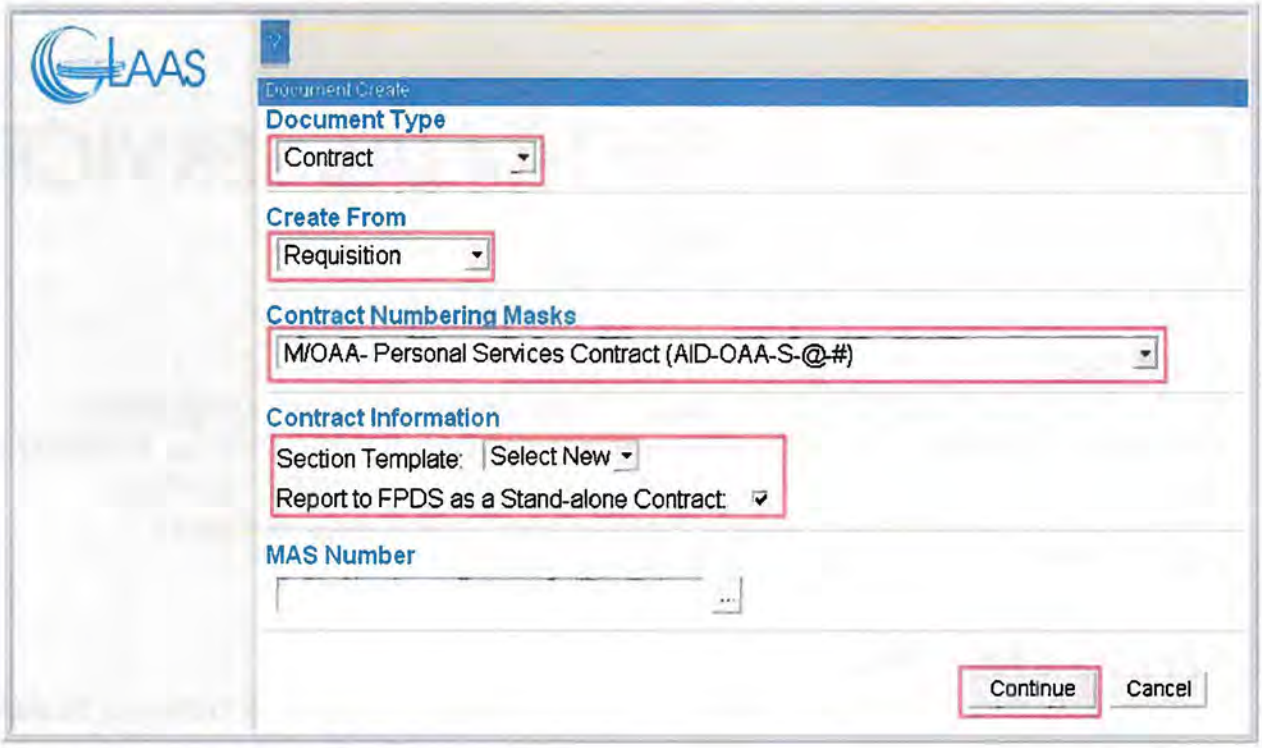


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Contract." • **Create From:** Select "Requisition." • **Contract Numbering Mask**: Select a numbering mask. • **Section Template**: Select "Select New" to load a clause template now or select "None" to add a template later. • **Report to FPDS as a Stand-alone Contract**: Check the box if you do not wish to issue Delivery/Task Orders against this Contract.	Refer to the *Creating a Contract from a GLAAS Solicitation* user guide if you are creating a PSC from a Solicitation. GLAAS uses the "S" instrument code for Personal Service Contracts. For instrument codes"S" and "C" you must check the **Report to FPDS as a Stand-alone Contract** box. All awards over $3,000 must be reported to the Federal Procurement Data System-Next Generation (FPDS-NG).
4.	Document Create	Click the **Continue** button.	

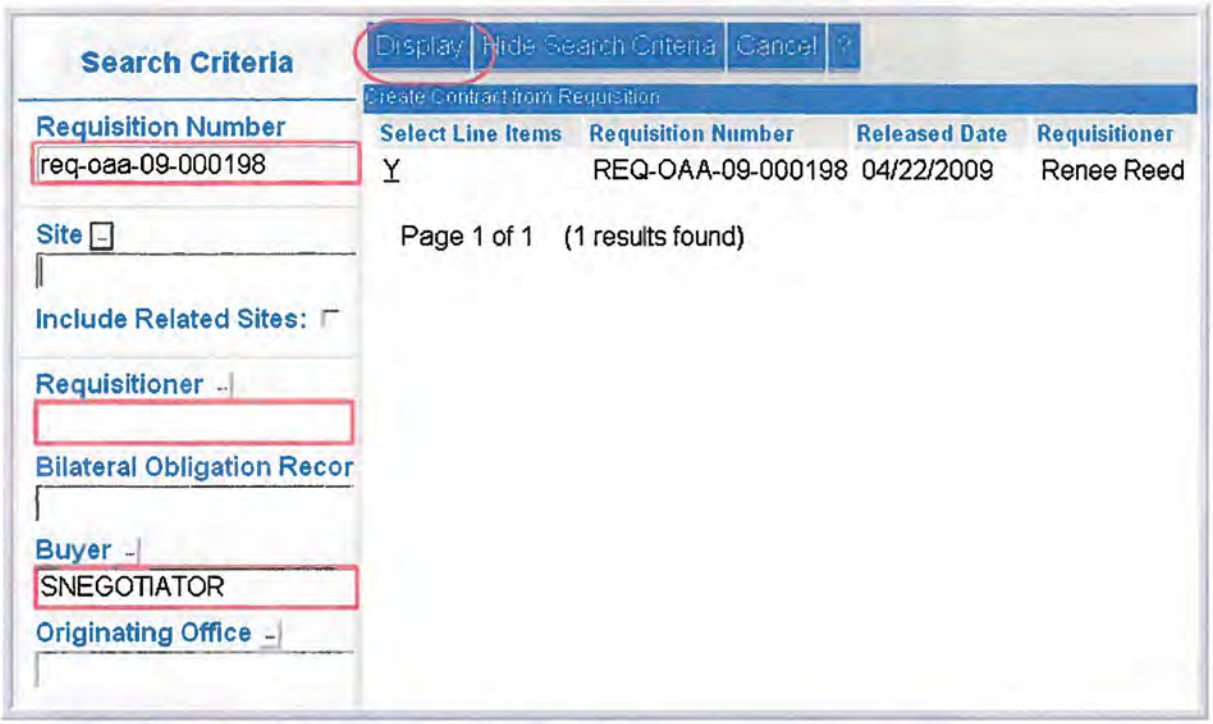


Figure 3: Create Contract from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Contract from Requisition	Clear the **Site** field and search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor.

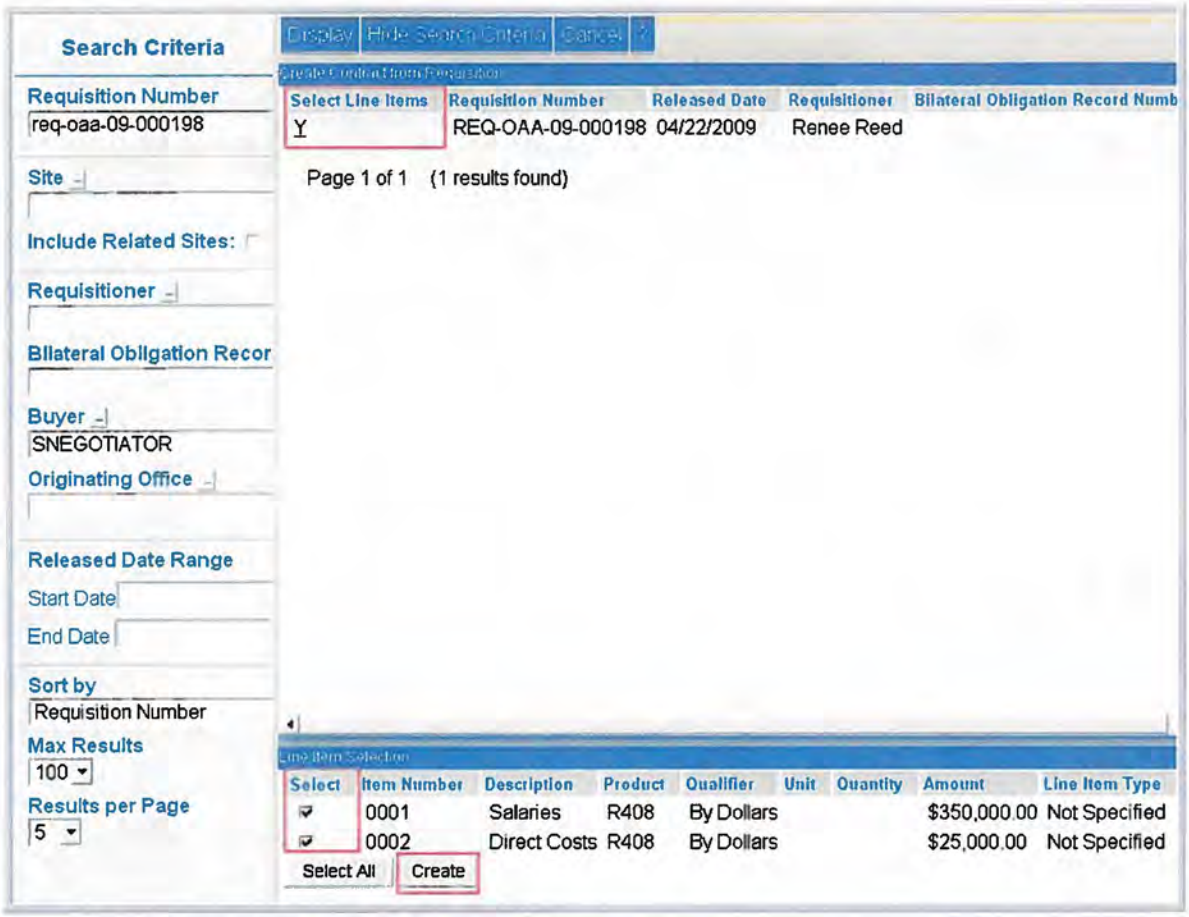


Figure 4: Create Contract from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Contract from Requisition	Click the **Y** link in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
7.	Create Contract from Requisition	Check the box in the **Select** column for each line item you want to pull into the Contract from the Requisition. Click the **Create** button.	

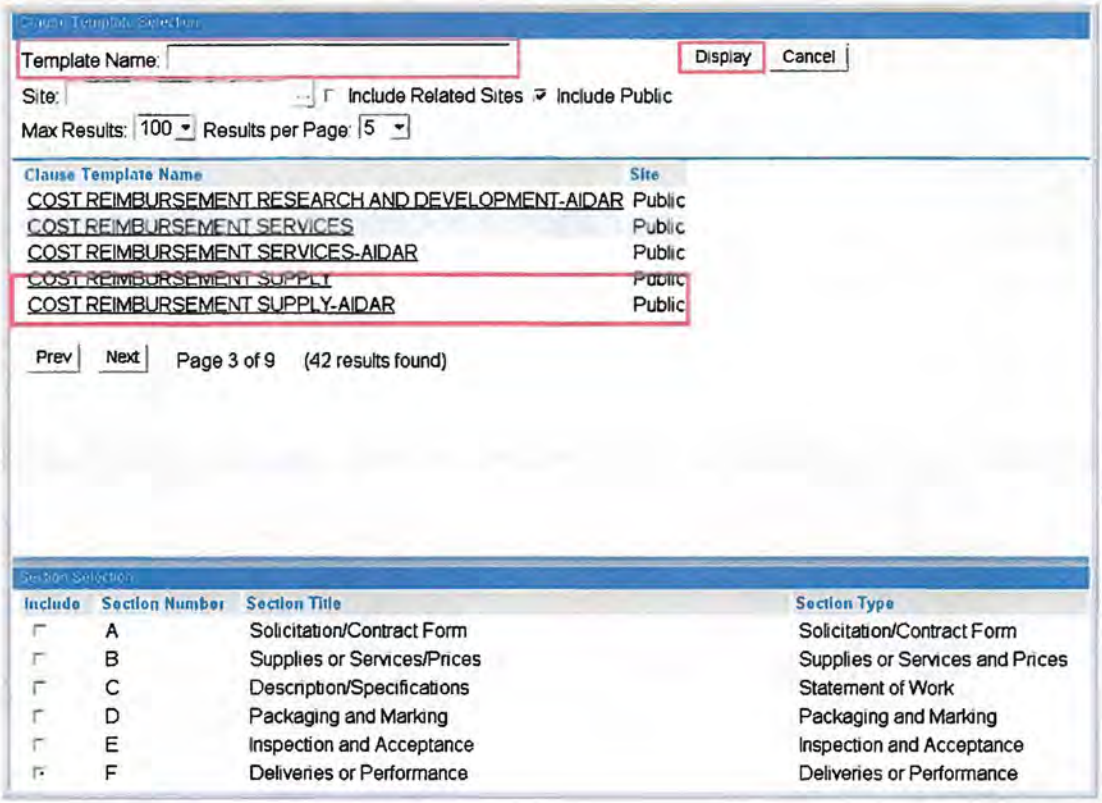


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Search for a Clause Template by **Template Name**. Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause templates include the basic FAR and AIDAR clauses you need for a Contract. You must add the FAR clauses first; you will add the AIDAR clauses later. USAID is not currently using a PSC-specific template. You will add the "Personal Services Contracting (PSC) Action (AID 300-1)" form later as an attachment.

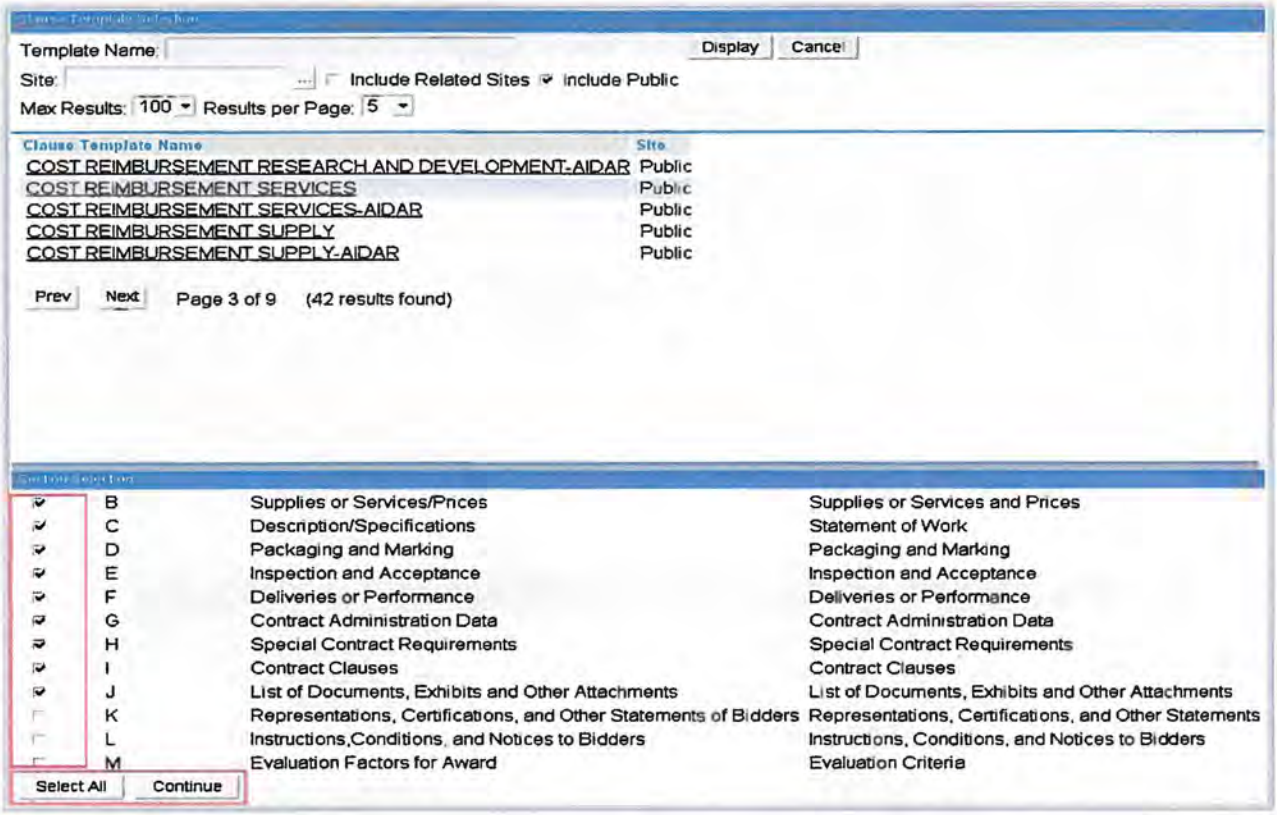


Figure 6: Clause Template Selection Screen

Steps	Section	User Action	Guidance
9.	Clause Template Selection	Click the **Select All** button to include all of the clause sections in your Contract. OR Check or uncheck the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change, and remove clauses from a GLAAS document.
10.	Clause Template Selection	Click the **Continue** button to pull the clauses into your Contract.	

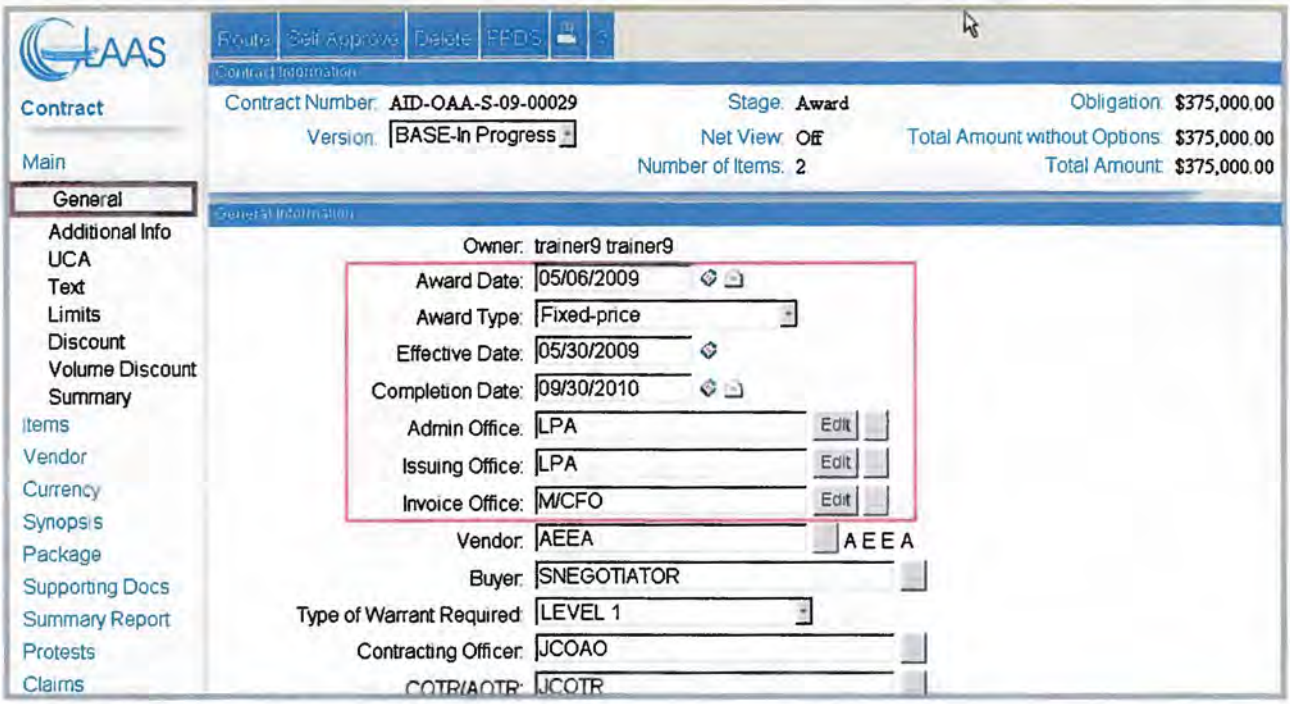


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Award Date:** Enter the date the award is signed. — R **Award Type:** Select the main award type for this contract — R **Effective Date:** Enter the Award's Period of Performance Start date. — R **Completion Date:** Enter the Award's Period of Performance End date. — R **Admin Office:** Select the code for the Contracting Officer Technical Representative's (COTR) office. — R **Issuing Office:** Select the code for the contracting office. — R	The Effective Date populates the Obligation's Document Date field in Phoenix. The Effective Date must be on or after the Requisition Date for all associated Requisitions. GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The **Award Type** selected here is reported to FPDS-NG. Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for more information on which award types are reported to FPDS-NG.

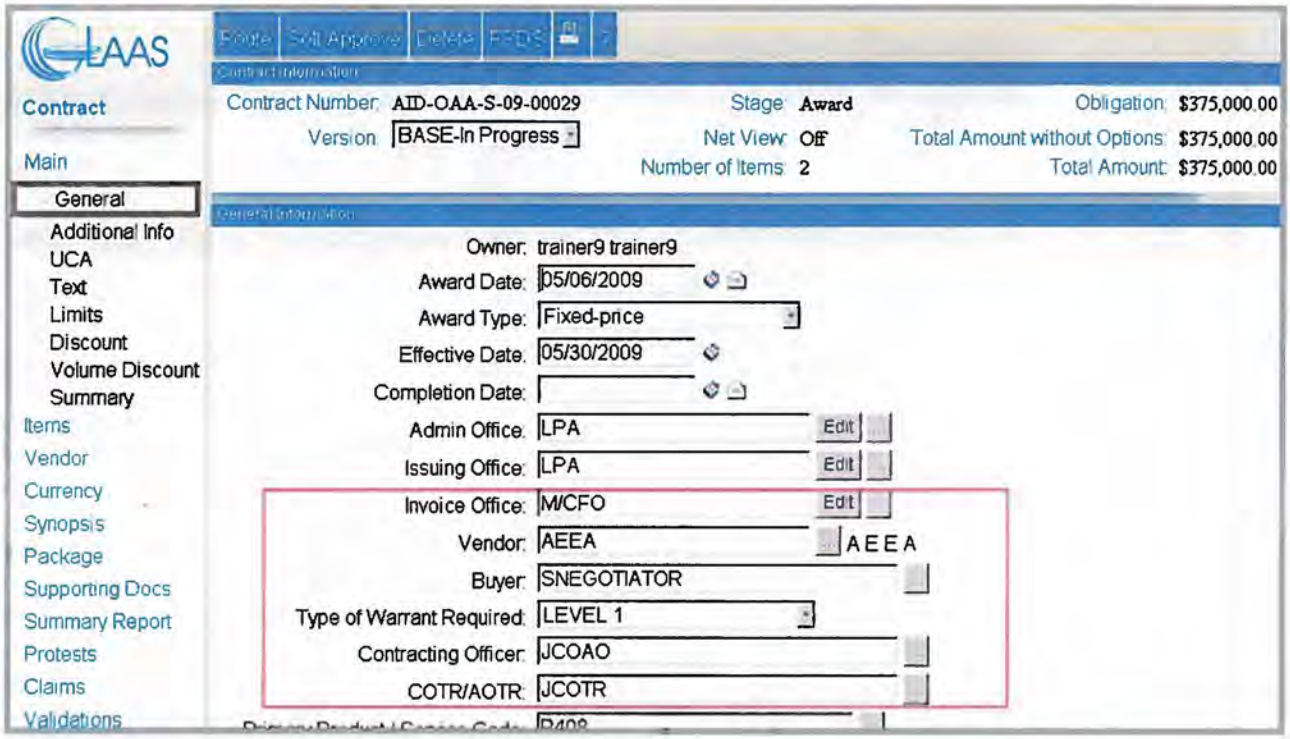


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
11. cont.	Main / General	Complete the following Required (R) and or Optional (O) fields: **Invoice Office:** Select the code for the office that receives the vendor invoices. — R **Vendor:** Select the Vendor code for this award. — R **Buyer:** Select the A&A Specialist for this award. — R **Type of Warrant Required:** Select a warrant level. — R **Contracting Officer:** Select the Contracting Officer for this award. — R **COTR/AOTR:** Select the COTR for this award. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The warrant level is validated against the Award TEC. Vendors assigned one of three special DUNS numbers in Phoenix will have their Vendor Name obscured in FPDS-NG: • For a sensitive domestic contractor, assign DUNS 790238638. • For a sensitive foreign contractor, assign DUNS 790238851. For a miscellaneous foreign contractor, assign DUNS 123456787.

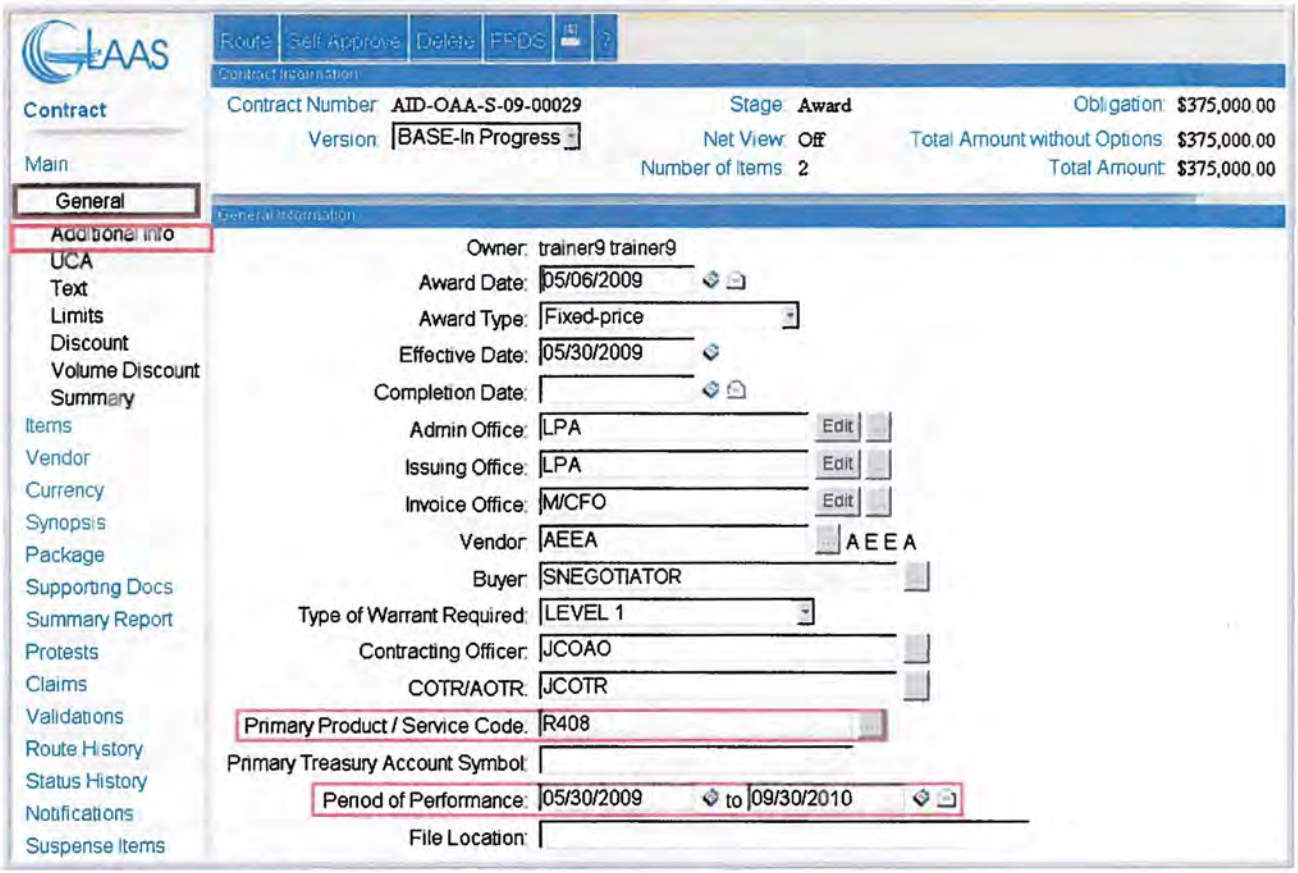


Figure 9: Main / General Screen

Steps	Section	User Action	Guidance
11. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Primary Product/Service Code:** Select the code for the goods or services on the award used to report to FPDS-NG. — R **Period of Performance:** Enter the current active period of the award. — R **File Location:** Enter the physical location of any related files. — O	**Primary Treasury Account Symbol** will be automatically populated by Phoenix once validations have been done. (Do NOT manually populate this field.)
12.	Main / General	Click the **Additional Info** link on the left-hand menu.	

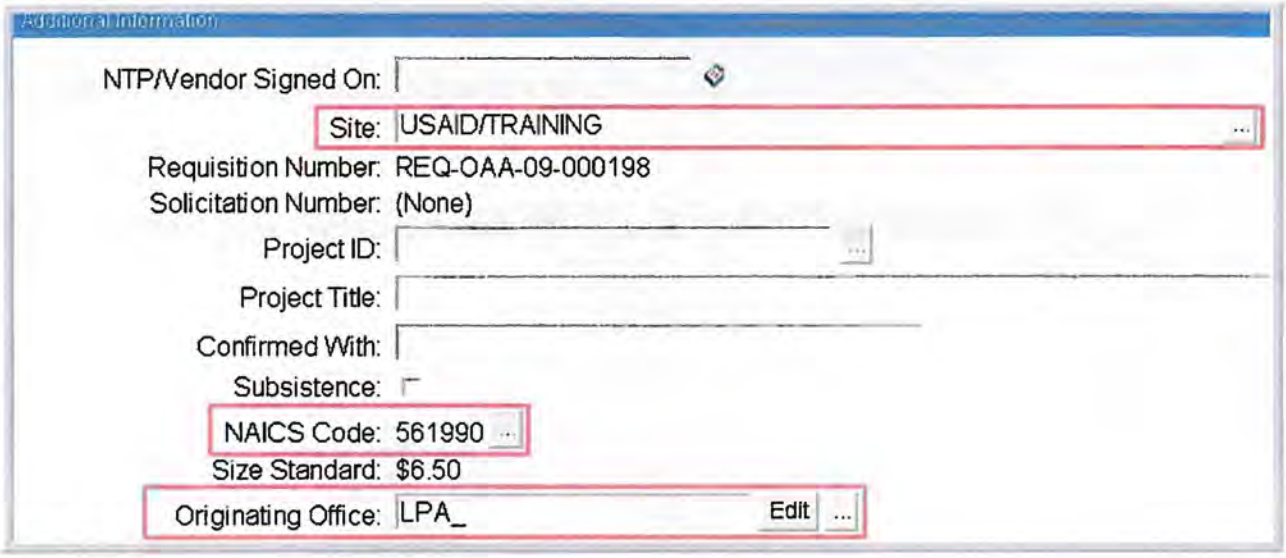


Figure 10: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		**Size Standard** will auto-populate when the **NAICS Code** is selected. USAID is not currently using the **Project ID** field.
		NTP/Vendor Signed On: Enter the date the "Notice to Proceed" was issued or the date the vendor acknowledged the order.	O	
		Site: Defaults to the site of the Requisition.	R	
		Project Title: The Project Title will populate from the Requisition if it was associated to an APP.	O	
		Confirmed With: Use this field if you want the system to print on the award: "Do not duplicate, confirm order with _____."	O	
		Subsistence: Check the box if the award is for food or shelter.	O	
		NAICS Code: Select the appropriate code from the list.	R	
		Originating Office: Select the code for the requesting office.	R	

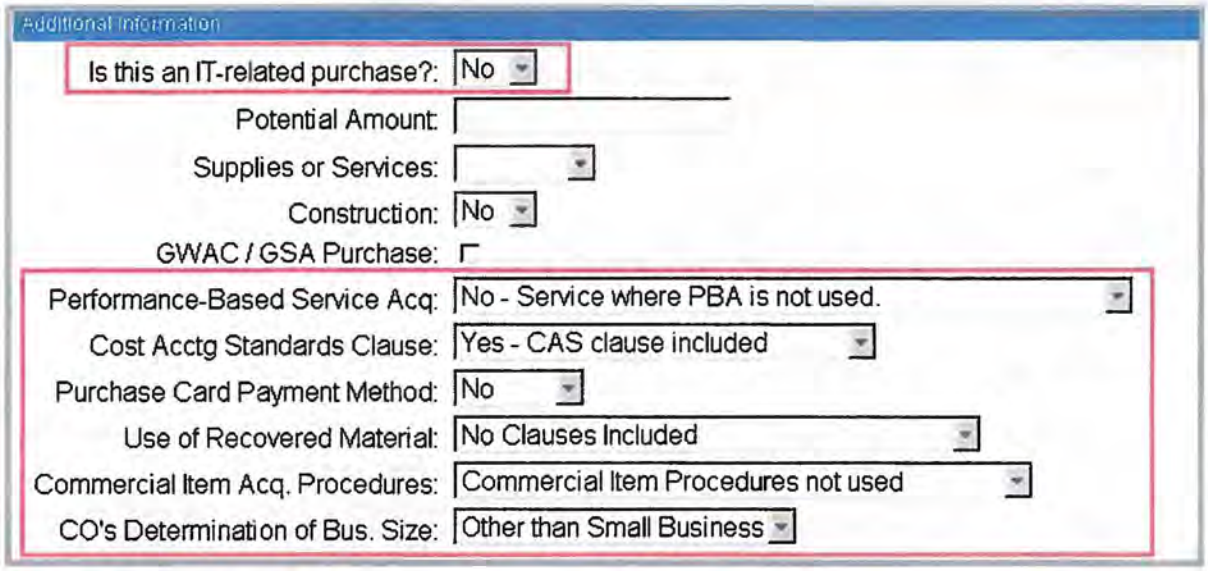


Figure 11: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Keep Item Numbers Constant on DO/TO** (not shown) • **Potential Amount** • **Supplies or Services** • **Construction** • **GWAC/GSA Services**
		Is this an IT-related purchase?: Select "Yes" if this is related to an IT purchase.	R	
		Performance-Based Service Acq: Select the appropriate value from the dropdown list.	R	
		Cost Acctg Standards Clause: Select the appropriate value from the dropdown list.	R	
		Purchase Card Payment Method: Select "Yes" if a purchase card was used.	R	
		Use of Recovered Material: Select the appropriate value from the dropdown list.	R	
		Commercial Item Acq. Procedures: Select the appropriate value from the dropdown list.	R	
		CO's Determination of Bus. Size: Select the appropriate value from the dropdown list.	R	

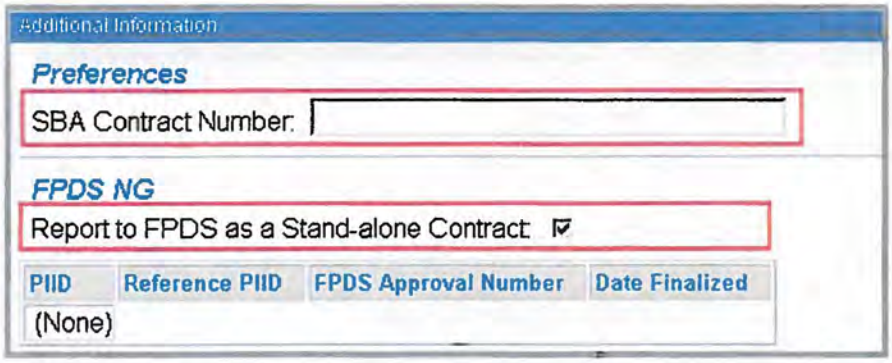


Figure 12: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **SBA Contract Number:** Type the SBA contract number, if applicable. — R/O **Report to FPDS as a Stand-alone Contract:** Check the box if you do not wish to issue Delivery/Task Orders against this Contract. — R/O	Once the system interfaces with FPDS-NG, it will auto-populate the **PIID** and the **FPDS Approval Number**.

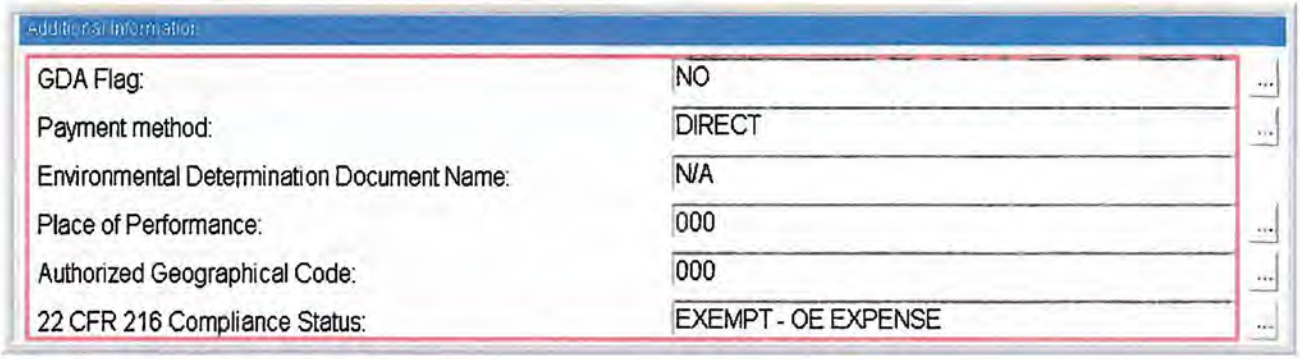


Figure 13: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **GDA Flag:** Select "YES" if this action is for a Global Development Alliance. — R **Payment Method:** Select from the list how the award will be paid. — R **Environmental Determination Document Name:** Enter a document title (if applicable), otherwise enter "N/A." — R **Place of Performance Code:** Select the three-digit code indicating the country where the work will be performed. — R **Authorized Geographical Code:** Select the three-digit code indicating the country that is authorizing the work to be done. — R **22 CFR 216 Compliance Status:** Select an environmental compliance status code by using the lookup button (...). — R	The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.

Benefiting Country Code:	000
Subcontract/Subgrant Plan Required:	NO
Performanced Based Contract/Results Oriented Grant:	YES
Name of Subcontractor/Subgrantee:	
Vessel Flag Priority:	
Leveraging:	
Grants Under Contract/Contracts Under Grant:	NO
COTR/AOTR Assigned Date:	04/22/2009
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?:	YES

Figure 14: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:	

Benefiting Country Code: Select the code of the country that will benefit from this action.	R
Subcontract/Subgrant Plan Required: Enter "YES" if a subcontracting plan is required.	R
Performance Based Contract/ Results Oriented Grant: Enter "YES" or "NO."	R
Name of Subcontractor/ Subgrantee: Enter the name of the subcontractor, if applicable.	O
Leveraging: Enter if this award was leveraged.	O
COTR/AOTR Assigned Date: Enter the date that the COTR/AOTR was assigned to this award.	R
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties? Enter "YES" or "N/A."	R
Has a hard copy been placed in the OAA contract award file? Enter "YES" or "N/A."	R

Acctg Period:	
Reporting Acctg Period:	
Action Type:	PS
Award TEC:	750000
NMS Award Fee Amount:	
NMS Award Other Amount:	
AIDAR/Agency Exemptions to Competition:	0

Figure 15: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		If the award is incrementally funded, the Award TEC will be greater than the committed amount. This is the Requestor's way to specify the award TEC and to indicate that you should increase the amount on the Solicitation / Award. **NMS Award Fee Amount** and **NMS Award Other Amount** are populated from NMS on Migrated Awards.
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Action Type: Select a code identifying the type of action.	R	
		Award TEC: Enter the Total Estimated Cost of the Award.	R	
		AIDAR/Agency Exemptions to Competition: Select a code to identify the type of exemption.	R	

Competition (Yes/No):	NO
Earmark/Directive/Other:	N/A
Earmark/Directive/Other Description:	
Requisition Number (for mods only):	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

Figure 16: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Competition (Yes/No):** Enter "YES" or "NO" if this action will be competed or not. — R **Earmark/Directive/Other:** Select a value to indicate if this award action is based on Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — R **Requisition Number (for mods only)**: Select the requisition number used to modify this award, otherwise select "0" if it is a new award. — R **Send notification to Requestor(s) of unused funds on the Requisition?:** Select "YES" to send a notification to Requestor(s), advising them of unobligated funds. Select "NO" to not notify the Requestor(s) of unobligated funds. — R	
14.	Main / Additional Info	Click the **Package** link on the left-hand menu (not shown).	Refer to the *Creating a Contract from a Requisition* user guide to complete the **Main / UCA**, **Main / Text**, **Items**, **Vendor**, **Currency**, and **Synopsis** screens.

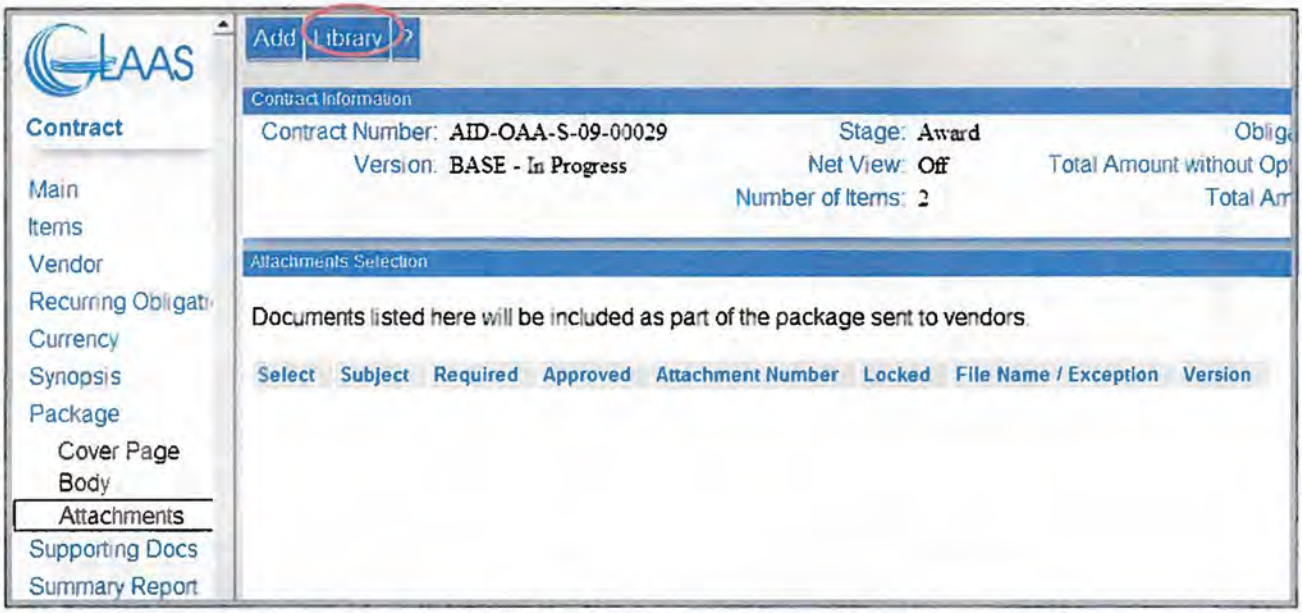


Figure 17: Package / Attachments Screen

Steps	Section	User Action	Guidance
15.	Package / Cover Page	Click the **Attachments** link on the left-hand menu (not shown).	Refer to the *Creating a Contract from a Requisition* user guide to complete the **Package / Cover Page**, and **Package / Body** screens.
16.	Package / Attachments	Click the **Library** toolbar button to add a document from the GLAAS Library.	Any attachments from the Requisition will be pulled into the Award. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." The GLAAS Library contains commonly used procurement documents. Each site has a library that is maintained by its Site Administrator. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail.

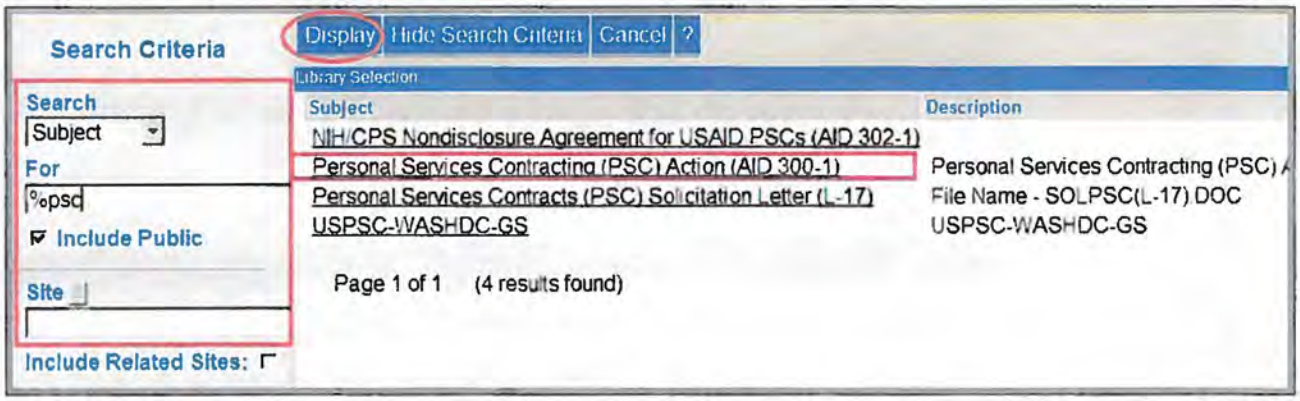


Figure 18: Library Selection Screen

Steps	Section	User Action	Guidance
17.	Library Selection	Clear the **Site** field and search for the "Personal Services Contracting (PSC) Action (AID 300-1)" form using the following fields: • **Search:** Defaults to "Subject." • **For:** Enter "%psc."	The **Library Selection** screen lists all of the documents in your site's GLAAS Library. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name.
18.	Library Selection	Click the **Display** toolbar button.	
19.	Library Selection	Click the **Subject** link.	

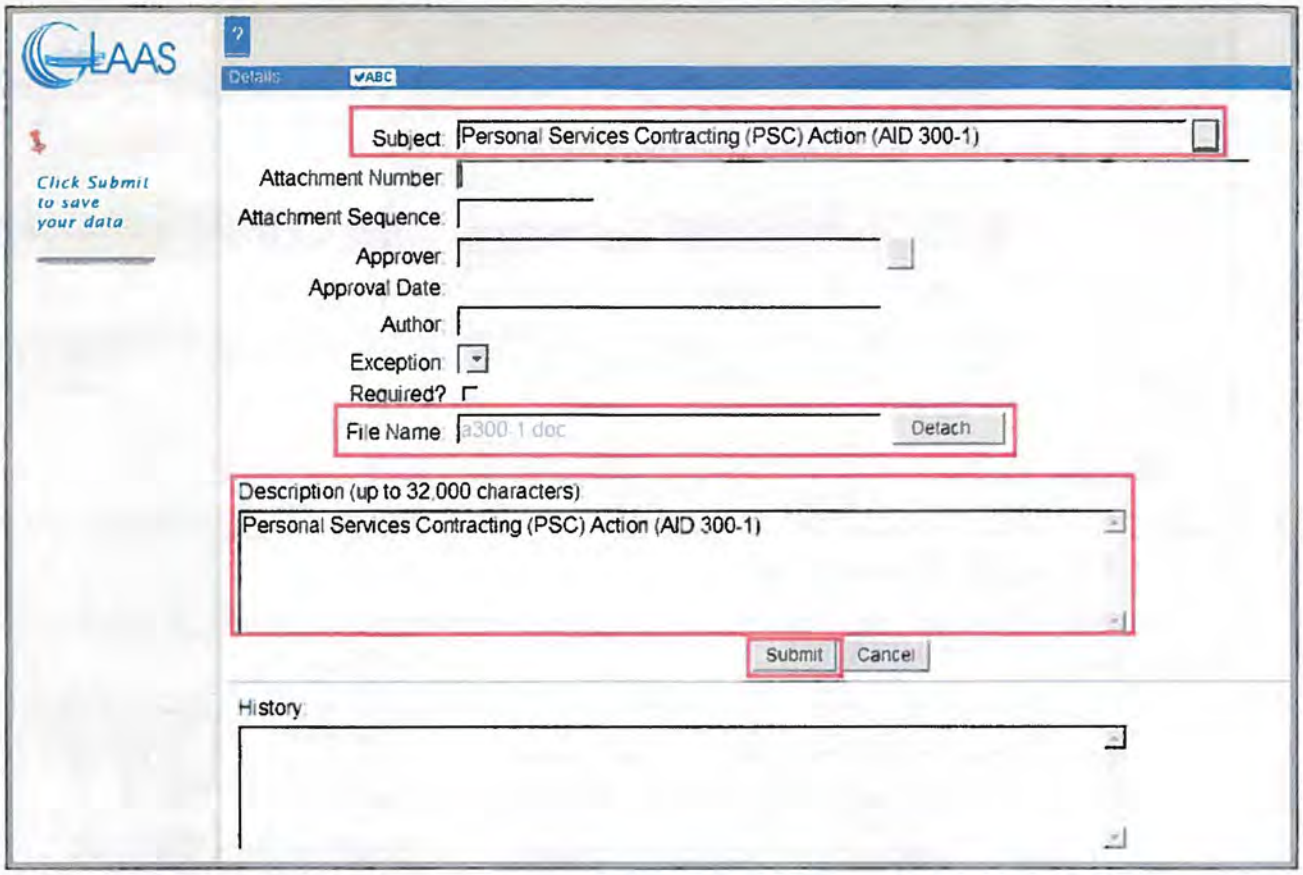


Figure 19: Details Screen

Steps	Section	User Action	Guidance
20.	Details	Add basic information about the attachment on this screen.	The **Subject** and **Description** fields will default from the Library. They can be changed if necessary. The title of the document appears in the **File Name** field. Refer to the *Adding Attachments and Supporting Documentation* user guide for more information.
21.	Details	Click the **Submit** button.	

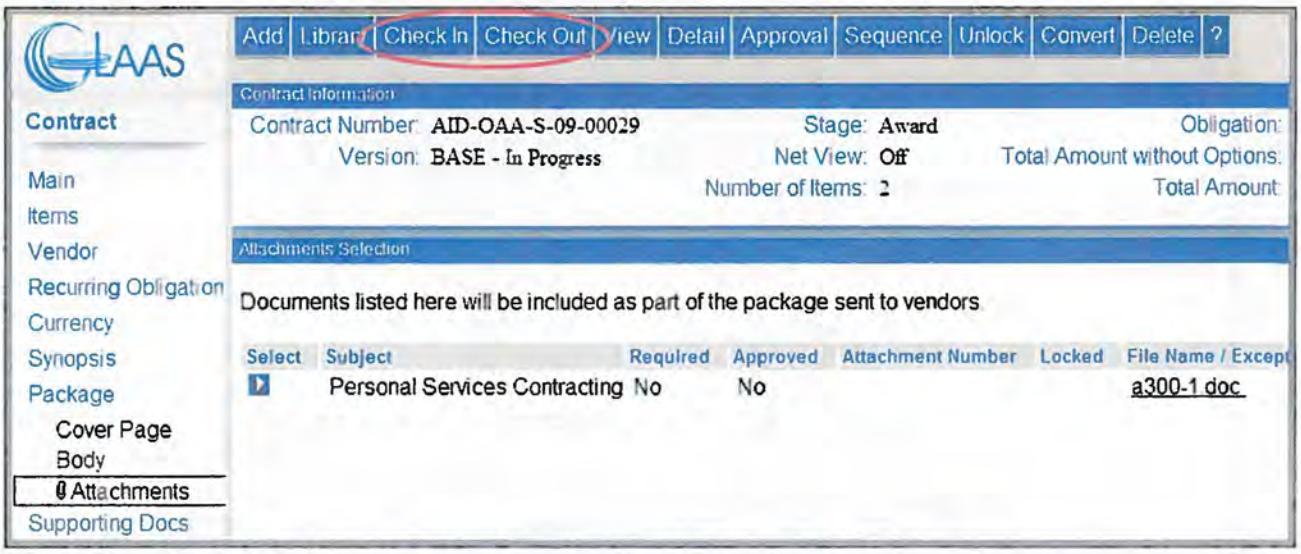


Figure 20: Package / Attachments Screen

Steps	Section	User Action	Guidance
22.	Package / Attachments	Modify the attachment by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to **Check In** and **Check Out** GLAAS documents in more detail.
23.	Package / Attachments	Refer to the *Creating a Contract from a Requisition* user guide to complete your document.	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Processing an Award Modification

November 2009

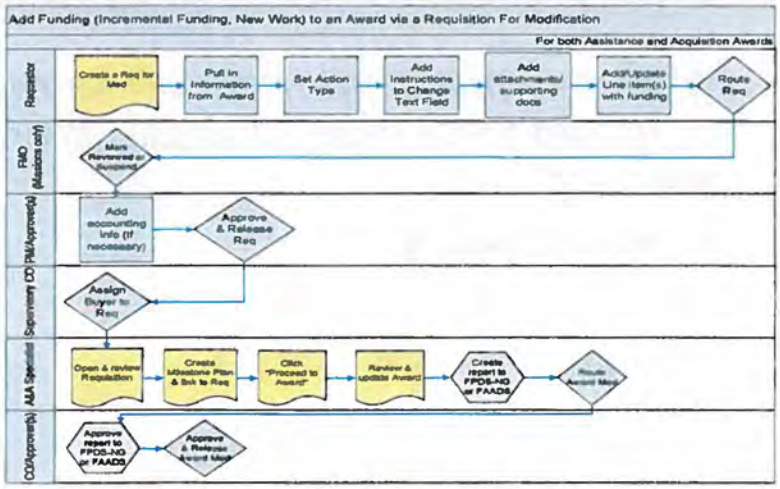
Award Modifications Objectives

- At the end of this topic, you will know how to process three types of modifications, including:
  - Add new funding
  - De-obligate funds
  - Administrative modifications

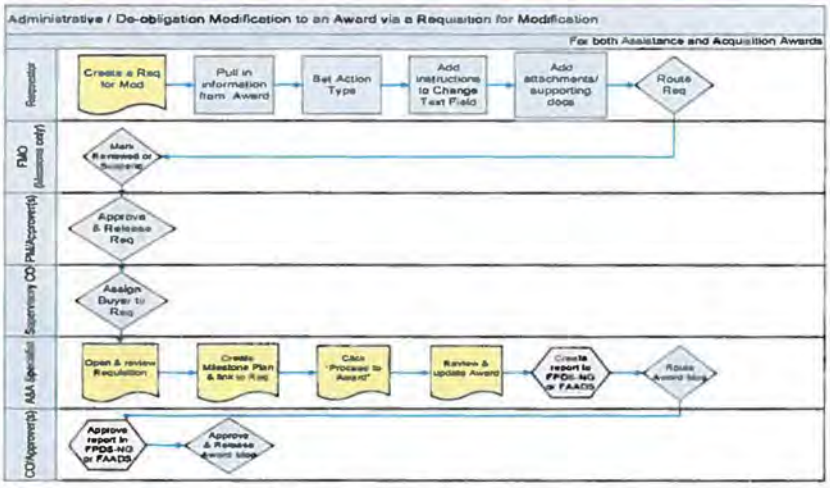
Modifying an Award

- Requestors create a Requisition for Modification
- A&A Specialists use the Requisition for Modification to modify the award

Add Funding Modification Workflow – RFM



Admin / De-obligate Modification Workflow – RFM



Processing a Modification

- The Buyer must:
  - Open the Requisition for Modification and review the Text screen to see changes to be made
  - Proceed to Award, pulling the changes forward
  - Review Screens for Accuracy
  - Generate the FPDS-NG or FAADS report
  - Update the Cover Page
  - Run GLAAS & Phoenix Validations
  - Route to the CO/AO for Approval

GLAAS 102 USER GUIDE:

MODIFYING AN AWARD TO ADD FUNDING USING A REQUISITION FOR MODIFICATION

PURPOSE:

This user guide will show you how to process a modification to add funding to an Award beginning with a released Requisition for Modification.

BEFORE YOU START:

1. In order to process a modification for an Order or Award, you must be an A&A specialist or a Contracting/Agreement Officer.
2. A Requisition for Modification has been created, approved and released in GLAAS.
3. A Milestone Plan for the modification has been created, linked to the Requisition for Modification, and baselined.

NOTE:

The screenshots in this user guide apply to Contracts, but the process for modifying Assistance Awards is the same.

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Open** link on the **Access Panel**. OR Type in the Requisition for Modification Number in the **Document** search field, click the **Go** button, and then skip to **Step 6**.	

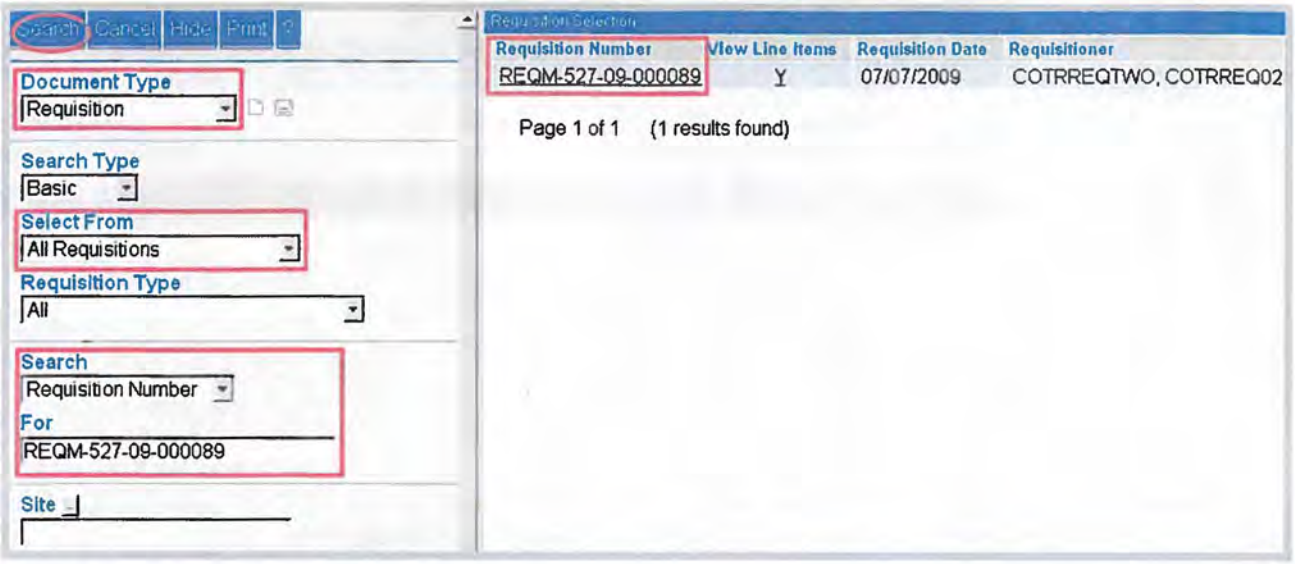


Figure 2: Document Selection Screen

Steps	Section	User Action	Guidance
3.	Document Selection	Complete the following fields: • **Document Type:** Select "Requisition." • **Select From:** Select "All Requisitions." • **Search:** Defaults to "Requisition Number." • **For:** Enter the Requisition for Modification number.	**Select From** will default to "My Requisitions." Change this to "All Requisitions" when searching for requisitions created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
4.	Document Selection	Click the **Search** toolbar button.	
5.	Document Selection	Click the **Requisition Number** link.	

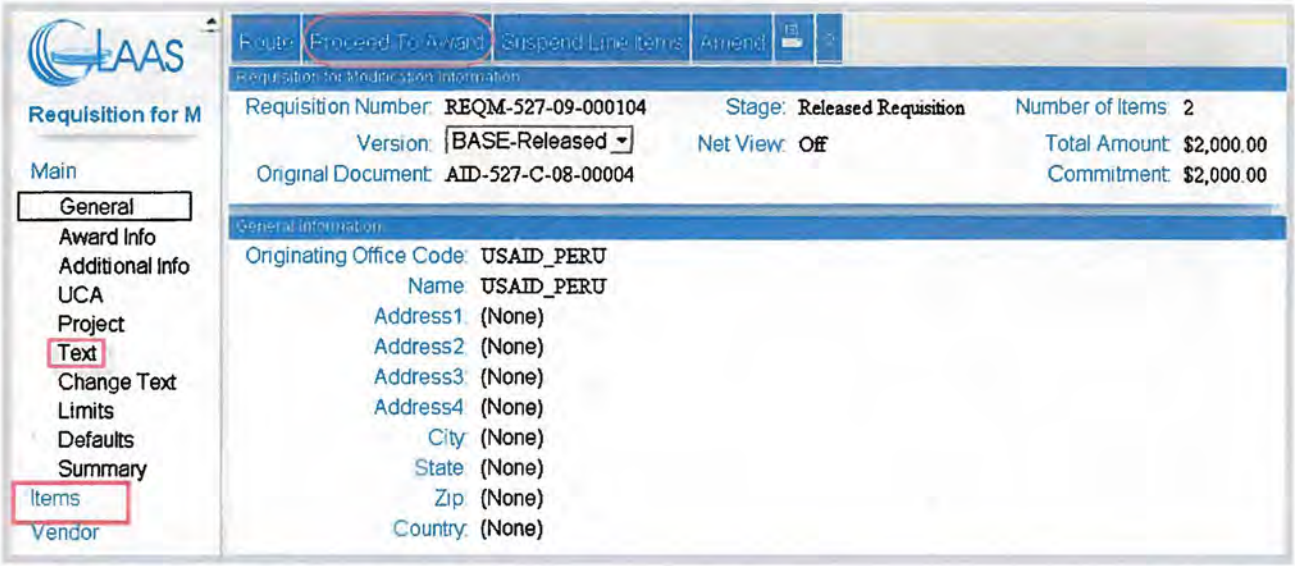


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Review the information for accuracy.	In creating the Requisition for Modification, the Requestor has already entered much of the necessary information. You are reviewing for accuracy.
7.	Main / General	Click the **Text** link on the left-hand menu.	
8.	Main / Text	Review the **Description** and **Header Text** fields (not shown).	**Description** and **Header Text** will contain information concerning the changes to be made in this modification.
9.	Main / Text	Click the **Items** link on the left-hand menu.	
10.	Items	Review the fields on the **Items** screens (not shown).	If you do not agree with the line items or the funding location, contact the Requestor and instruct her or him on how to appropriately add the funding.
11.	Items	Click the **Main** link on the left-hand menu (not shown).	
12.	Main / Text	Click the **Proceed to Award** toolbar button.	

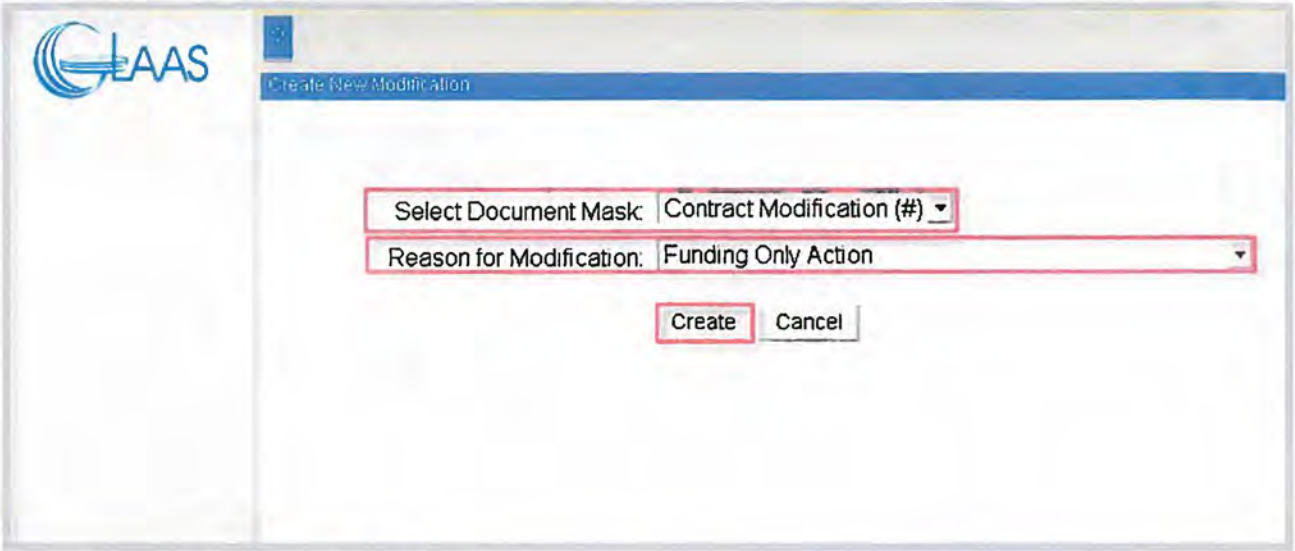


Figure 4: Create New Modification Screen

Steps	Section	User Action	Guidance
13.	Create New Modification	Select the "Contract (or Grant) Modification (#)" **Document Mask**. Select the appropriate **Reason for Modification**.	The **Reason for Modification** selection is transmitted to FPDS-NG for Acquisition Awards. This field does not appear for Assistance Awards.
14.	Create New Modification	Click the **Create** button.	GLAAS processes this Requisition for Modification into an Award modification.

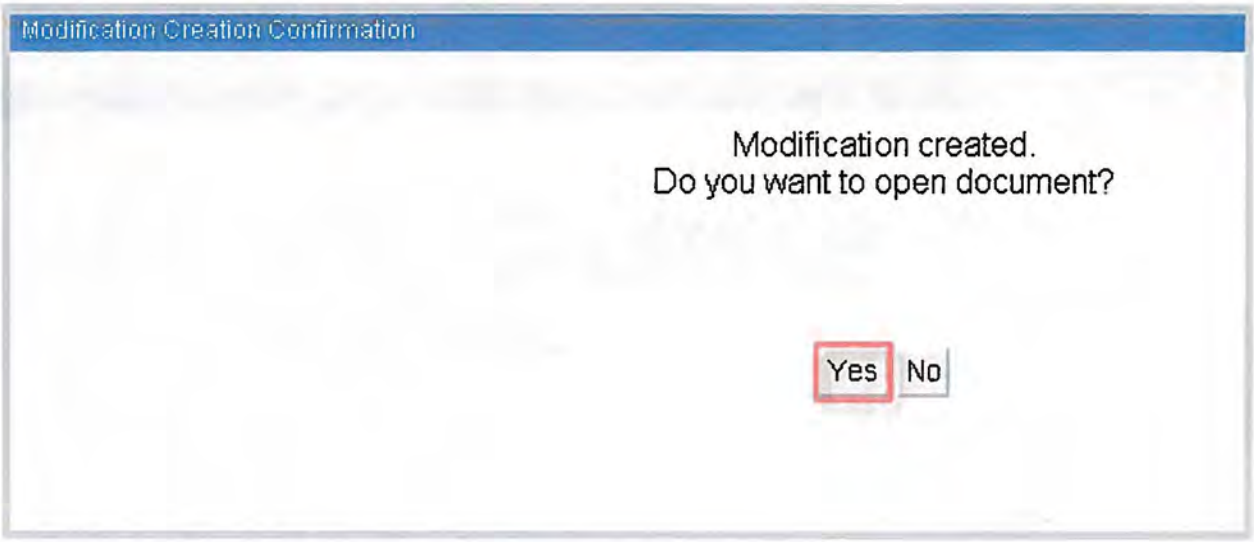


Figure 5: Create New Modification Screen

Steps	Section	User Action	Guidance
15.	Create New Modification	Click the **Yes** button to continue.	If you are performing a de-obligation or other unfunded modification, please refer to the *Processing a De-obligation or Administrative Modification* user guide.

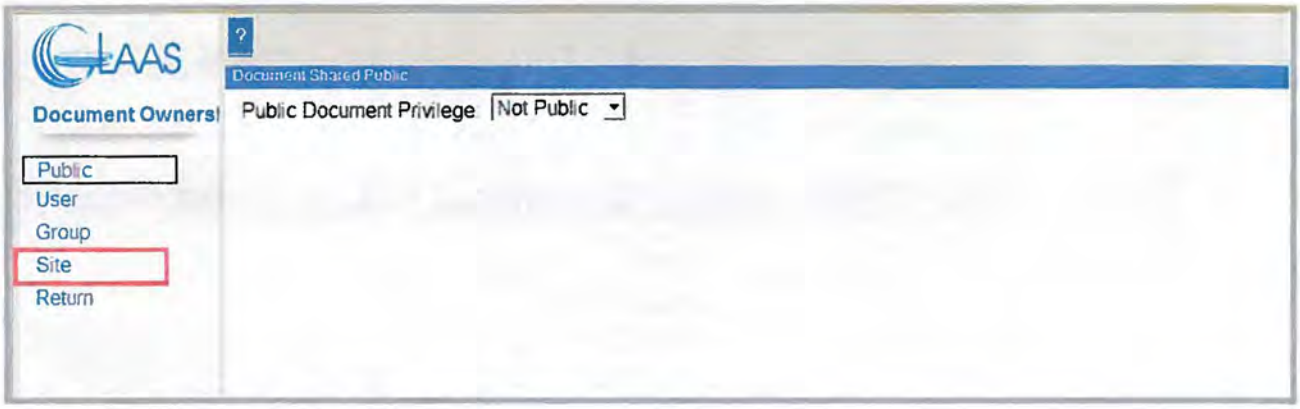


Figure 6: Document Shared Public Screen

Steps	Section	User Action	Guidance
16.	Main / General	Click the **Ownership** link on the left-hand menu (not shown).	While the modification is in process, you must un-share the document with the Admin Office.
17.	Document Shared Public	Click the **Edit** toolbar button (not shown).	
18.	Document Shared Public	Click the **Site** link on the left-hand menu.	

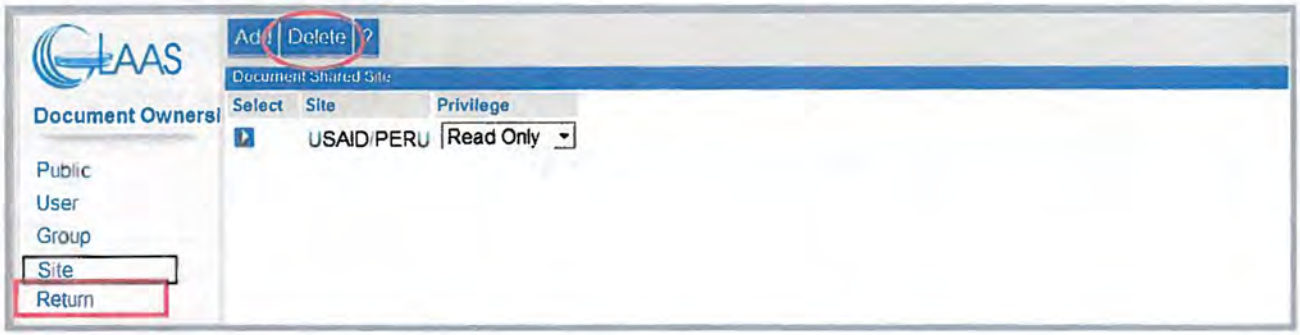


Figure 7: Document Shared Public Screen

Steps	Section	User Action	Guidance
19.	Document Shared Site	Click the **Delete** toolbar button. Click **OK** when asked if you wish to delete the site (not shown).	
20.	Document Shared Site	Click the **Return** link on the left-hand menu.	

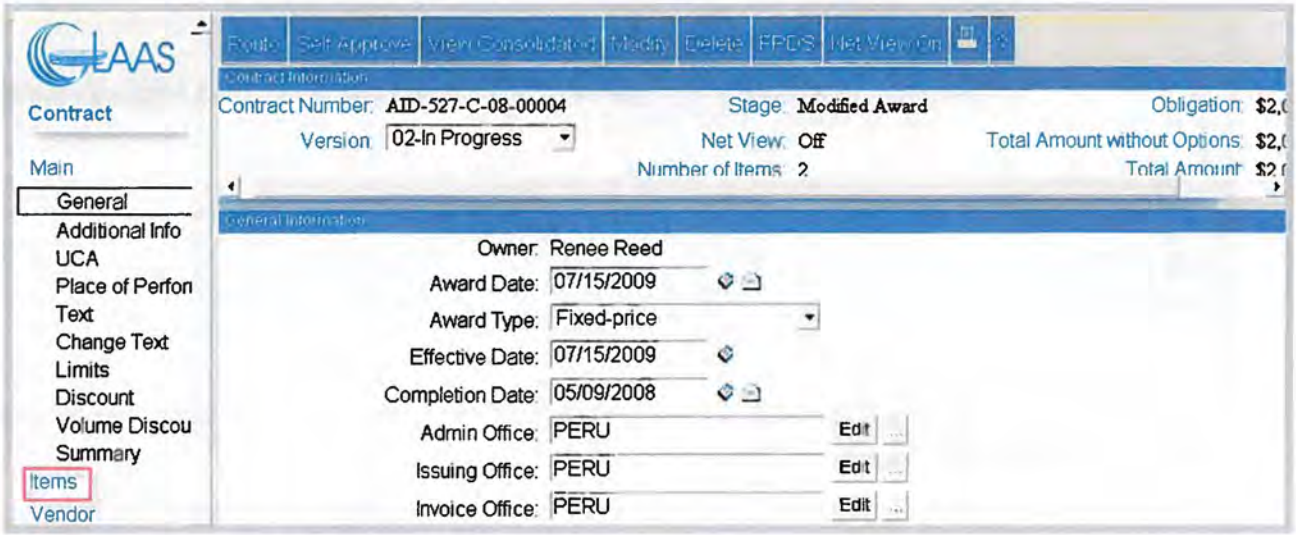


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
21.	Main / General	Review and update the fields on this screen as needed.	If necessary, update the values in: • **Effective Date** • **Completion Date** • **Period of Performance** (not shown) • **Buyer** (not shown) • **Contracting Officer** (not shown) • **COTR/AOTR** (not shown)
22.	Main / General	Click the **Items** link on the left-hand menu.	

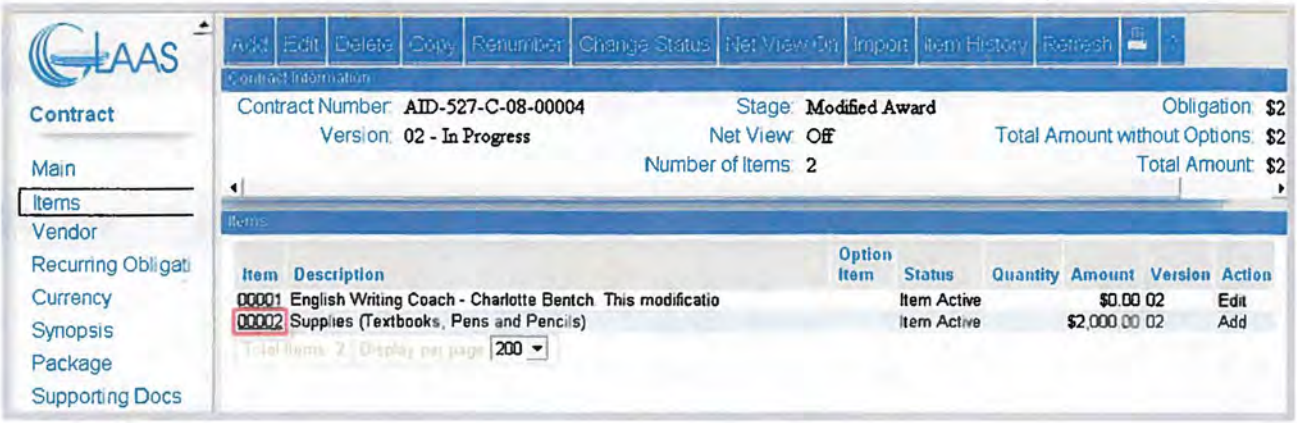


Figure 9: Items Screen

Steps	Section	User Action	Guidance
23.	Items	Click the **Item** number link that is being modified.	The Award modification pulls in changes to the line items made on the Requisition for Modification. You will see values in the **Amount** column on lines that have been affected. Only the items that have been modified will appear if the **Net View** is set to "OFF."

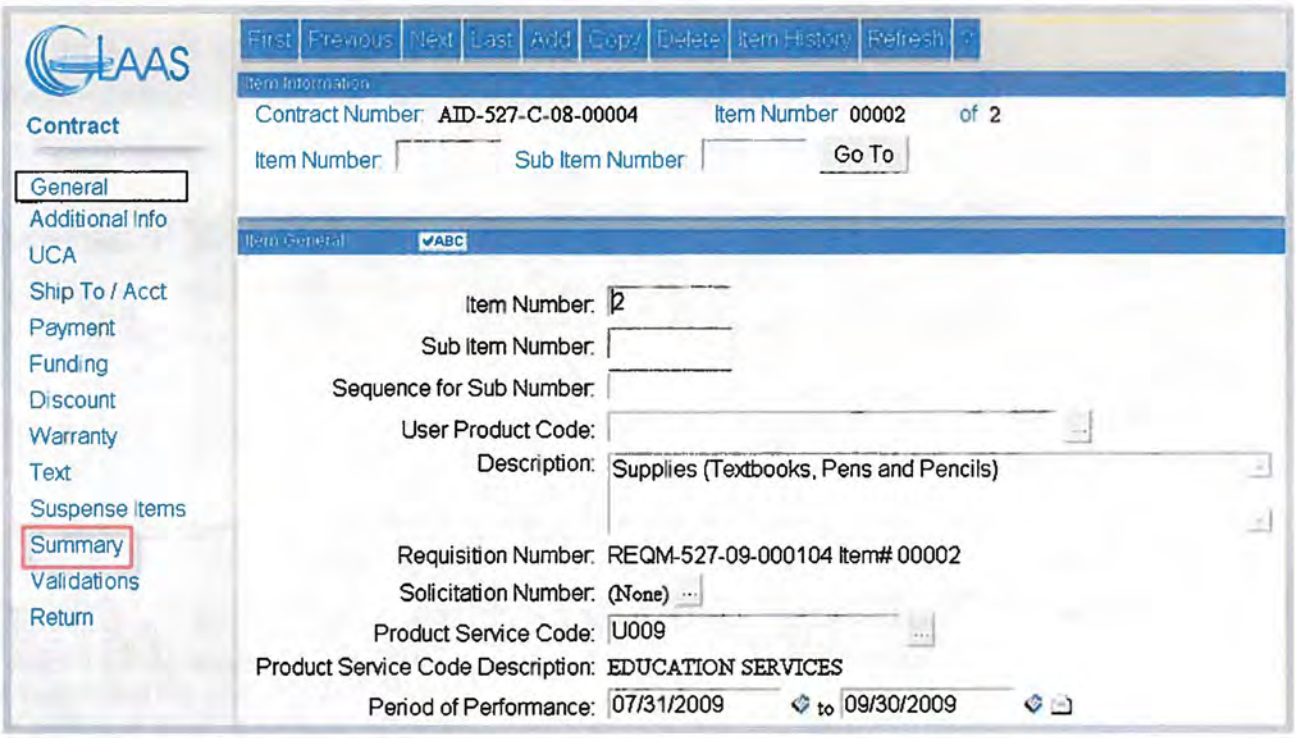


Figure 10: Items / General Screen

Steps	Section	User Action	Guidance
24.	Items / General	Click the **Summary** link on the left-hand menu.	

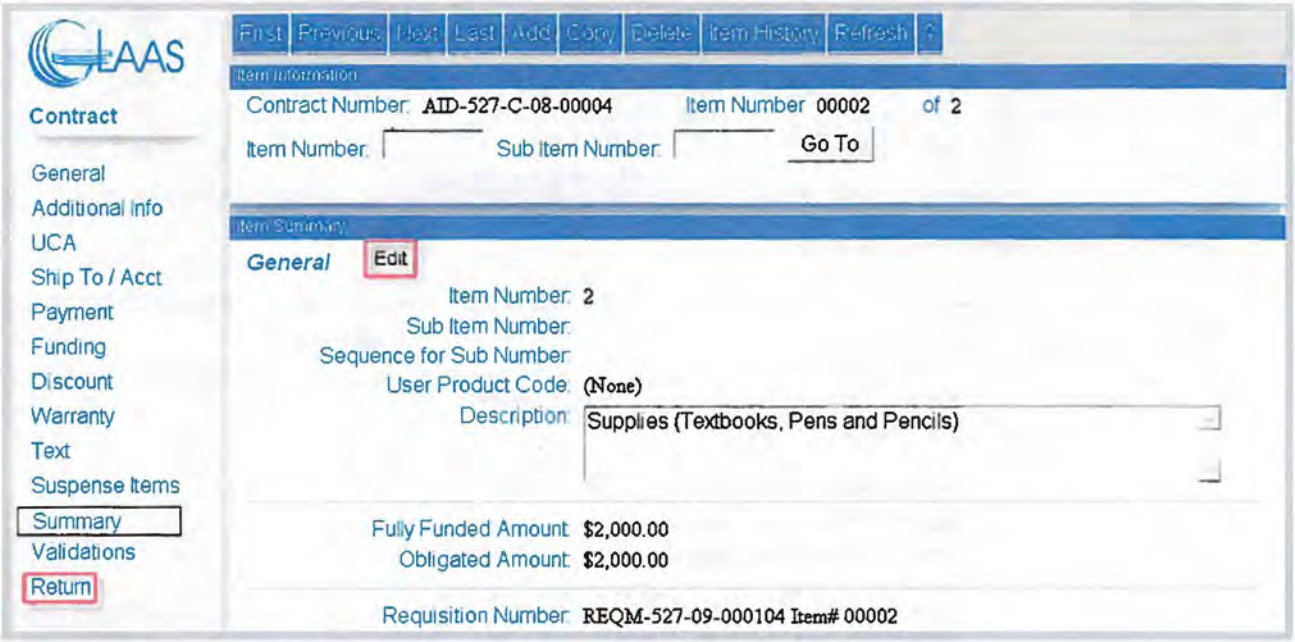


Figure 11: Items / General Screen

Steps	Section	User Action	Guidance
25.	Items / Summary	Review the information for accuracy and edit as necessary.	The field name for the amount may be different based upon the **Award Type** (e.g., **Estimated Total Cost**, **Total Amount**). Click the various **Edit** buttons (Edit) to make any changes.
26.	Items / Summary	Click the **Return** link on the left-hand menu.	
27.	Items	Click the **Main** link on the left-hand menu (not shown).	If the award is in a foreign currency, you can validate the exchange rate by clicking the **Currency** link on the left-hand menu (not shown). **WARNING!** Do not change the **Base Currency**.
28.	Main / General	Click the **Additional Info** link on the left-hand menu (not shown).	

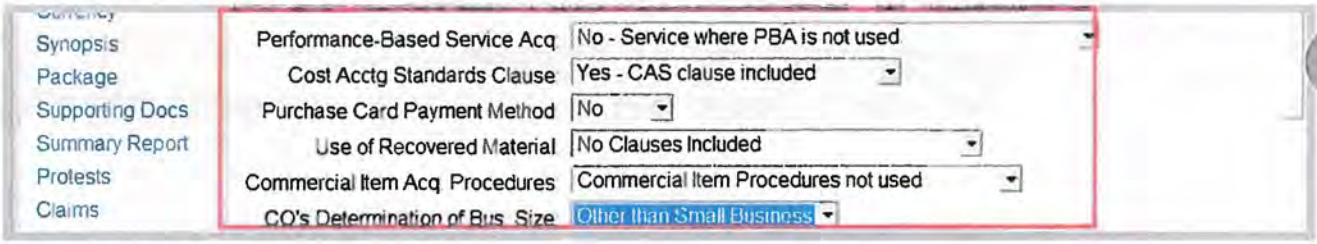


Figure 12: Main / Additional Info Screen

Steps	Section	User Action	Guidance
29.	Main / Additional Info	Validate the following Required (R) and/or Optional (O) fields: **Performance Based Services Acq:** Select the appropriate value from the dropdown menu. — R **Cost Acctg Standards Clause:** Select the appropriate value from the dropdown menu. — R **Purchase Card Payment Method:** Select "Yes" if a purchase card was used. — R **Use of Recovered Material:** Select the appropriate value from the dropdown menu. — R **Commercial Item Acq. Procedures:** Select the appropriate value from the dropdown menu. — R **CO's Determination of Bus. Size:** Select the appropriate value from the dropdown menu. — R	
30.	Main / Additional Info	Click the **Change Text** link on the left-hand menu (not shown).	

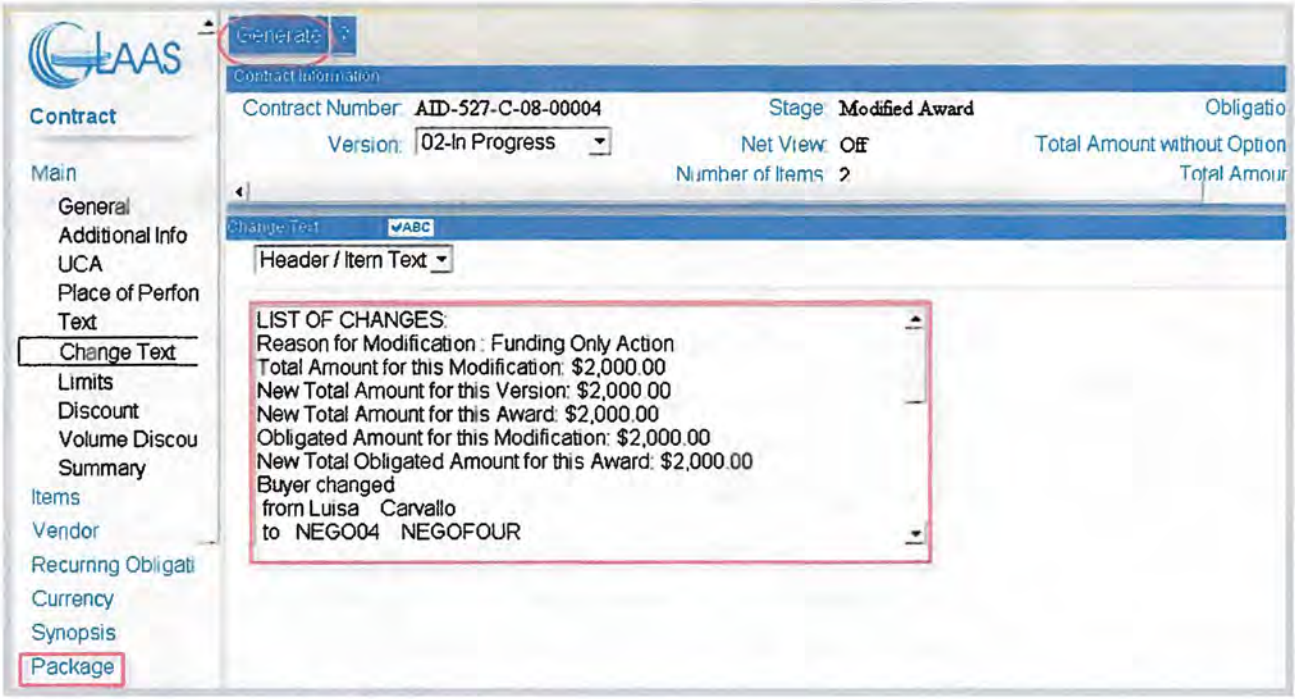


Figure 13: Main / Change Text Screen

Steps	Section	User Action	Guidance
31.	Main / Change Text	Click the **Generate** toolbar button. OR Manually enter the purpose of this modification.	Clicking the **Generate** toolbar button will produce a system-generated list of fields that have changed on this modification. You can use the **Generate** toolbar button, manually enter your own text, or edit the system-generated text.
32.	Main / Change Text	Verify that the changes that will be made to this Award appear in the text field.	Any text in this box will display on the Standard Form for this modification. Delete any text that you do not want on the form.
33.	Main / Change Text	Click the **Package** link on the left-hand menu.	

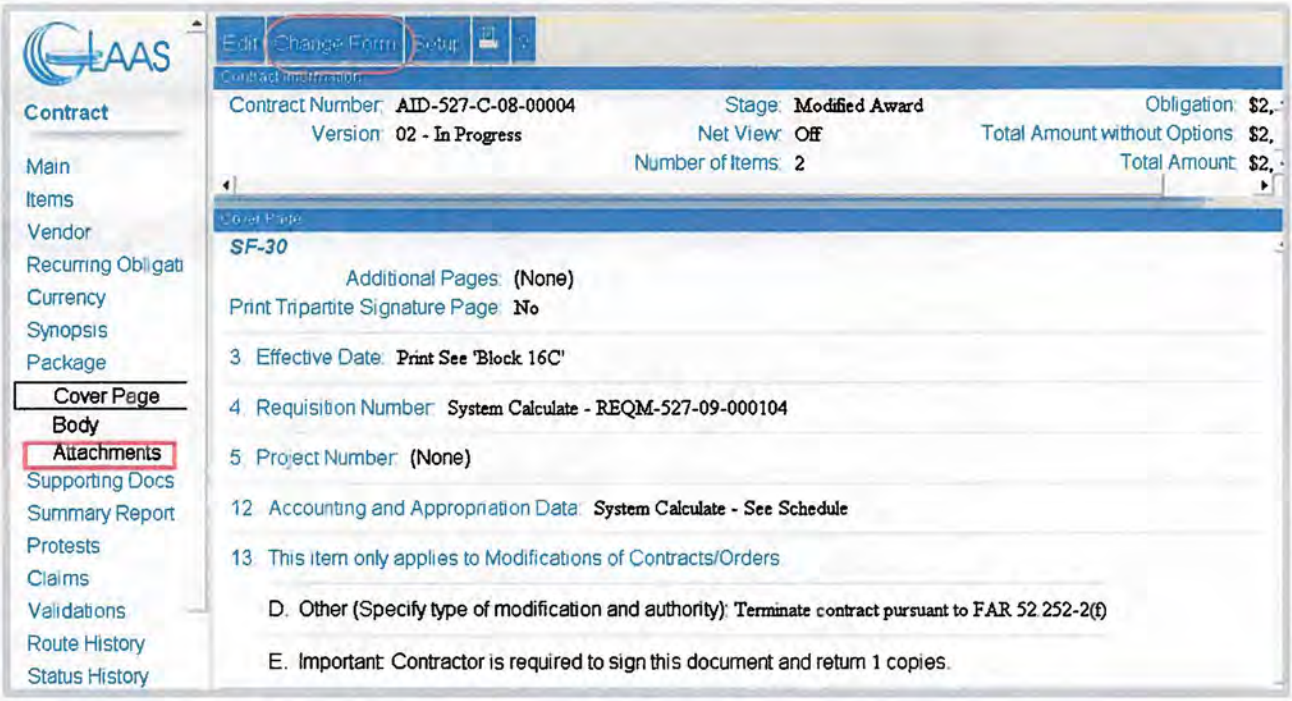


Figure 14: Package / Cover Page Screen

Steps	Section	User Action	Guidance
34.	Package / Cover Page	If you are working on a Contract modification, click the **Change Form** toolbar button. OR If you are modifying an Assistance Award, do not use the GLAAS Cover Page. Instead, click the **Attachments** link on the left-hand menu, add the Assistance modification form located in the GLAAS Library (not shown) and skip to **Step 37**.	Upload any documentation relating to the modification under the **Attachments** or **Supporting Docs** screens. Refer to the *Adding Attachments and Supporting Documentation* user guide for more information.
35.	Package / Cover Page	Select the "SF 30 – Modification of Contract" form (not shown).	

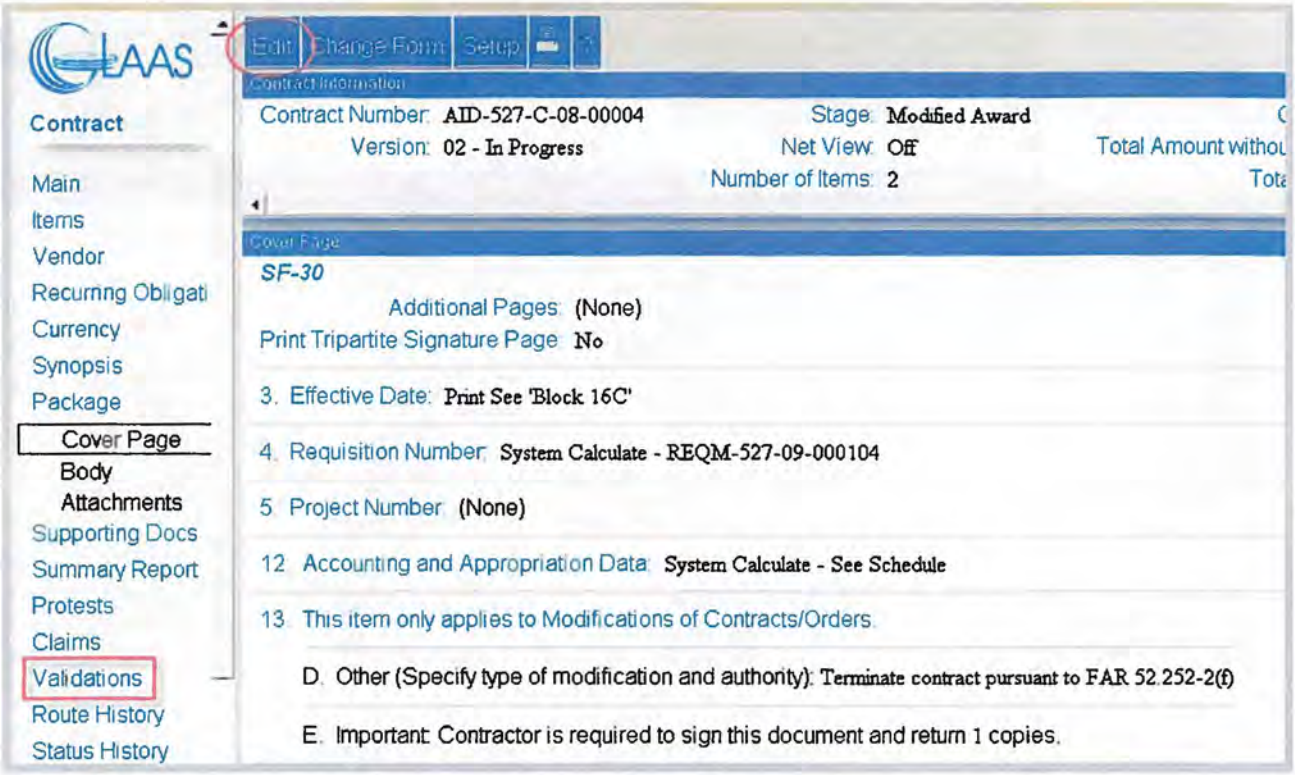


Figure 15: Package / Cover Page Screen

Steps	Section	User Action	Guidance
36.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the **Cover Page**. If you do not edit block 13 you will receive an **Error Message** when you validate this Award in GLAAS. Click the **Submit** button (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
37.	Package / Cover Page	Click the **Validations** link on the left-hand menu. Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item (not shown). **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
38.	Validations	Click the **Main** link on the left-hand menu (not shown).	

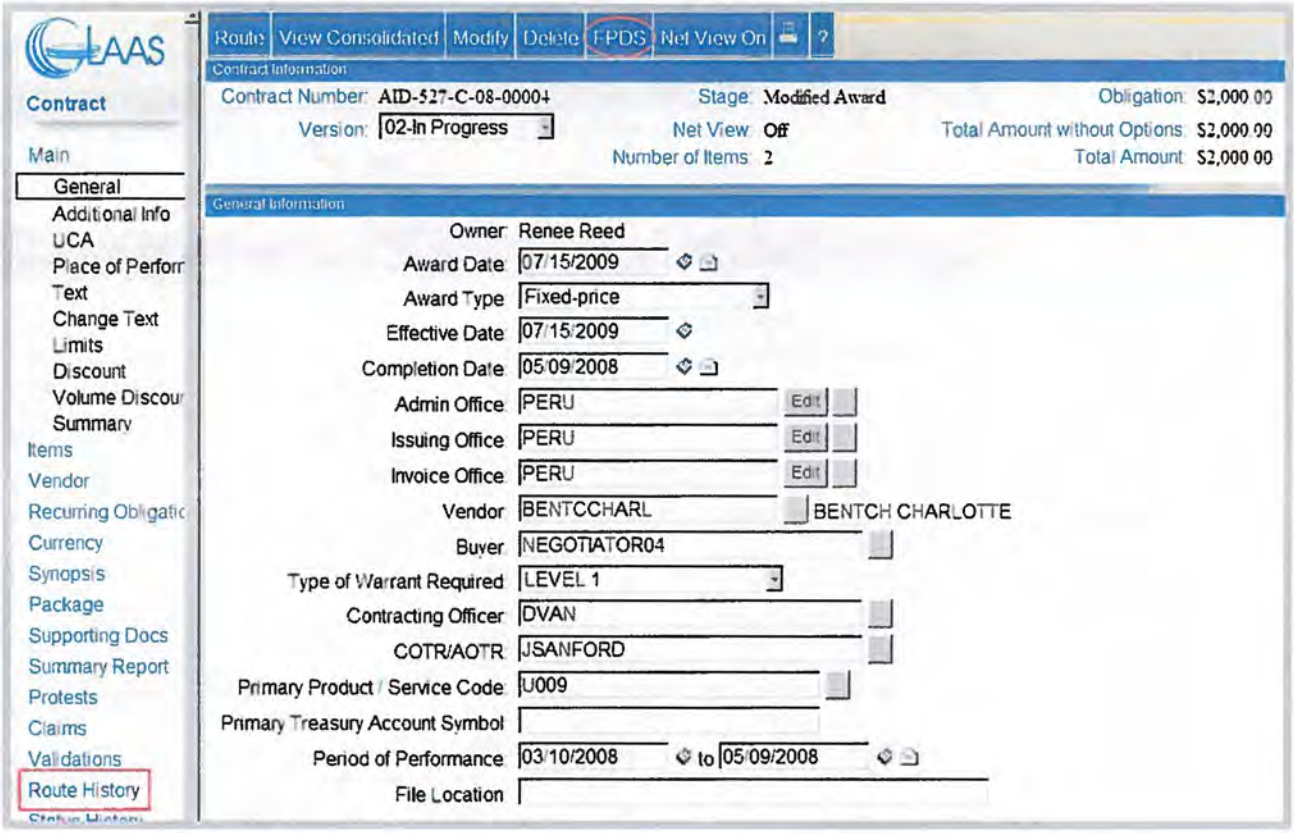


Figure 16: Main / General Screen

Steps	Section	User Action	Guidance
39.	Main / General	Click the **FPDS-NG** (Acquisition) or **FAADS** (Assistance) toolbar button (not shown). Update and validate the FPDS-NG or FAADS record prior to routing and approving the Award modification (not shown).	Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for more information.
40.	Main / General	Click the **Route History** link on the left-hand menu.	

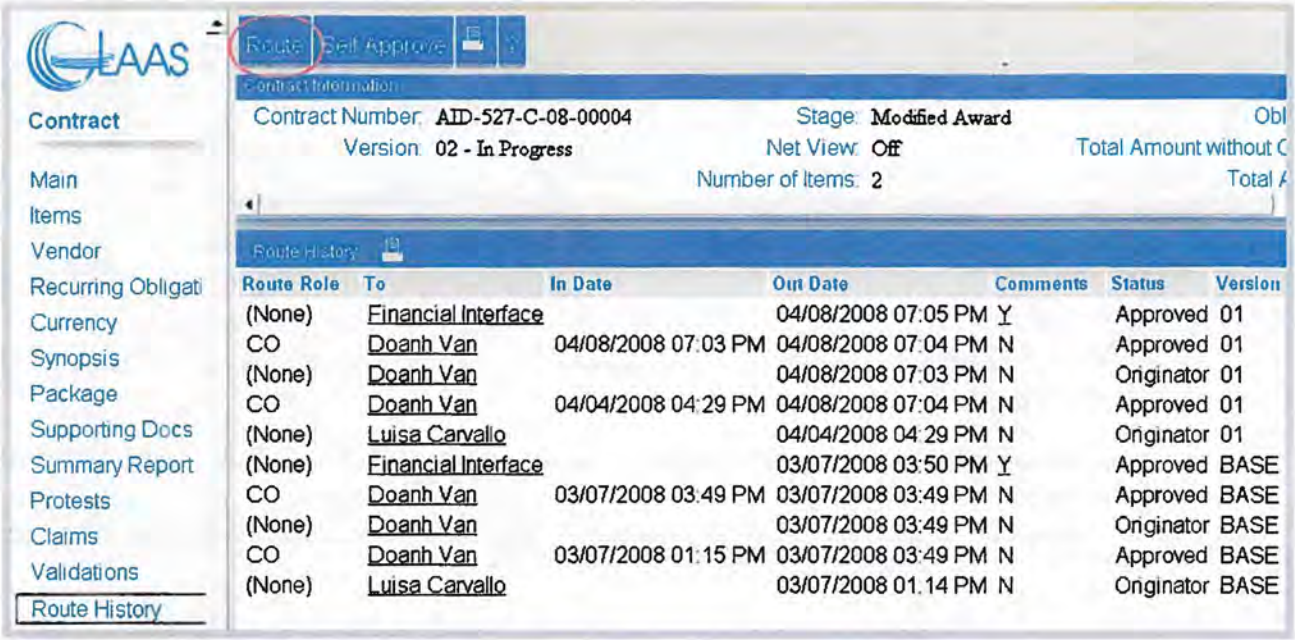


Figure 17: Main / Route History Screen

Steps	Section	User Action	Guidance
41.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for "Approval" to the Contracting/Agreement Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
42.	Route History	Click the **Return to Home** link on the left-hand menu (not shown).	

After the modification has been approved and released by the CO/AO, open the Award and complete the following steps giving the Admin Office access to the Award.

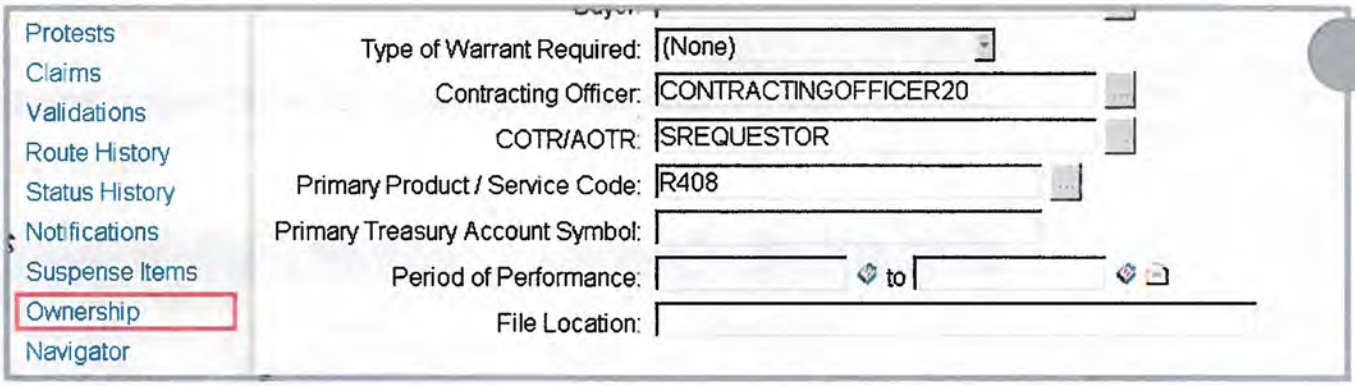


Figure 18: Main / General Screen

Steps	Section	User Action	Guidance
43.	Main / General	Click the **Ownership** link on the left-hand menu.	
44.	Share Document	Click the **Edit** toolbar button (not shown).	

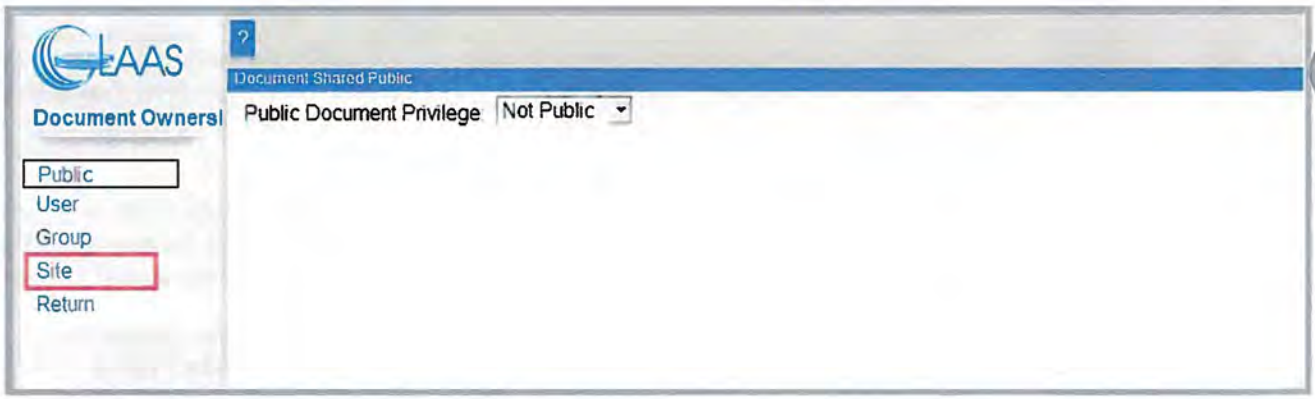


Figure 19: Document Shared Public Screen

Steps	Section	User Action	Guidance
45.	Document Shared Public	Click the **Site** link on the left-hand menu.	
46.	Document Shared Site	Click the **Add** toolbar button (not shown).	

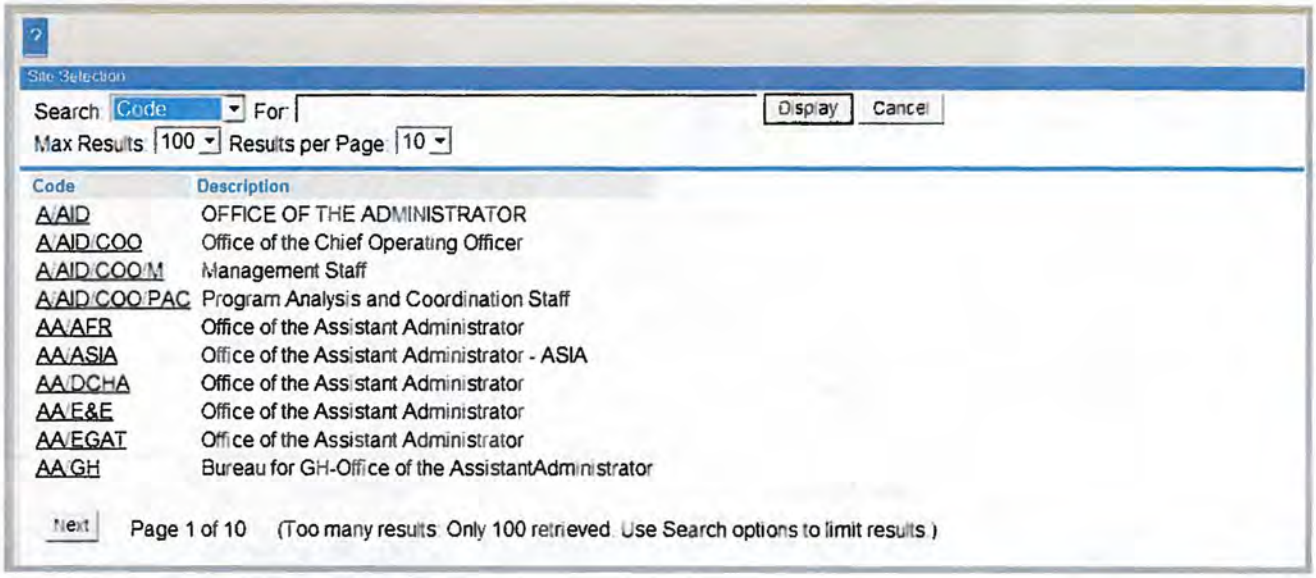


Figure 20: Site Selection Screen

Steps	Section	User Action	Guidance
47.	Site Selection	Search for and select the Contracting/Agreement Officer Technical Representative's (COTR/AOTR) site.	This is the same as the **Admin Office** on the **Main / General** screen.

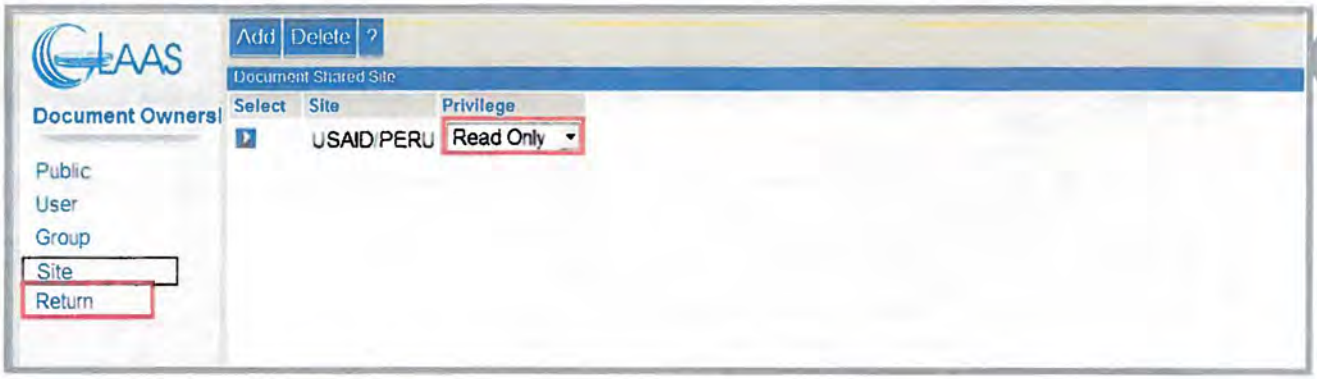


Figure 21: Document Shared Site Screen

Steps	Section	User Action	Guidance
48.	Document Shared Site	Ensure the **Privilege** is "Read Only."	This will allow the Admin Office to view the released Award, and access it to create modifications.
49.	Document Shared Site	Click the **Return** link on the left-hand menu.	
50.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

GLAAS 102 USER GUIDE:

PROCESSING A DE-OBLIGATION OR ADMINISTRATIVE MODIFICATION

PURPOSE:

This user guide will show you how to modify an award to de-obligate funds or to process an administrative modification.

BEFORE STARTING:

1. In order to process a modification for an Order or Award, you must be an A&A Specialist or a Contracting/Agreement Officer.
2. A Requisition for Modification must has been created, approved and released in GLAAS.
3. A Milestone Plan for the modification has been created, linked to the Requisition for Modification, and baselined.

NOTE:

The screenshots in this user guide apply to Contracts, but the process for modifying Assistance Awards is the same.

STEPS:

Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	Welcome	Log on to GLAAS (not shown).	
2.	Document Selection	Click the **Open** link on the **Access Panel**. OR Type in the Requisition for Modification Number in the **Document** search field, click the **Go** button, and then skip to **Step 6**.	

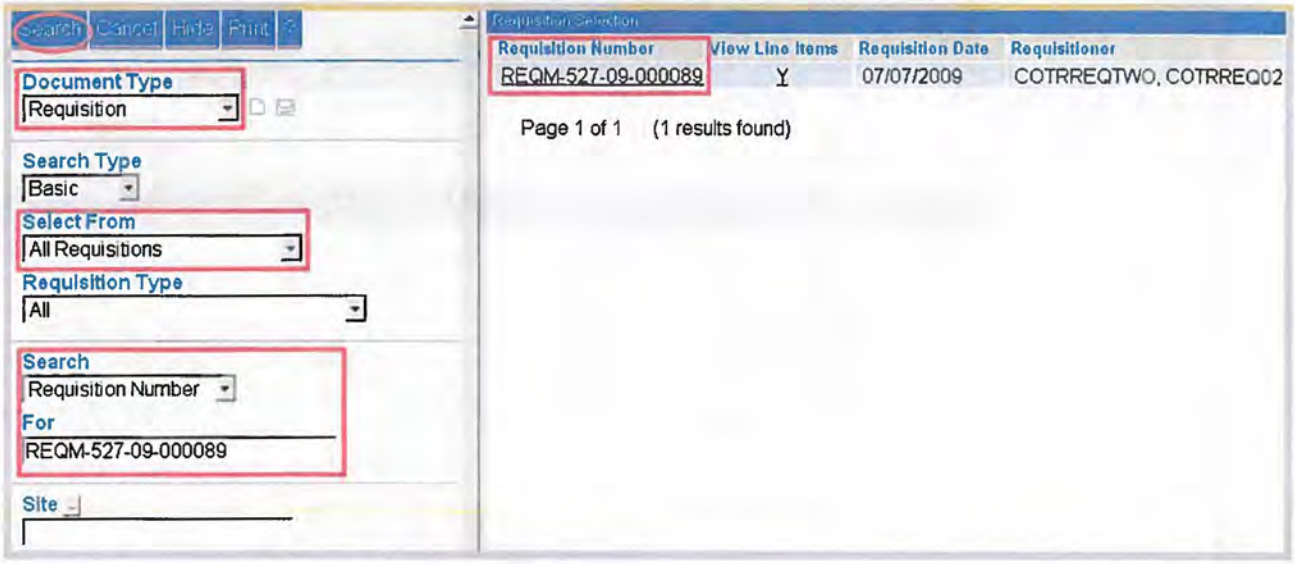


Figure 2: Document Selection Screen

Steps	Section	User Action	Guidance
3.	Document Selection	Complete the following fields: • **Document Type:** Select "Requisition." • **Select From:** Select "All Requisitions." • **Search:** Defaults to "Requisition Number." • **For:** Enter the Requisition for Modification number.	**Select From** will default to "My Requisitions." Change this to "All Requisitions" when searching for requisitions created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
4.	Document Selection	Click the **Search** toolbar button.	
5.	Document Selection	Click the **Requisition Number** link.	

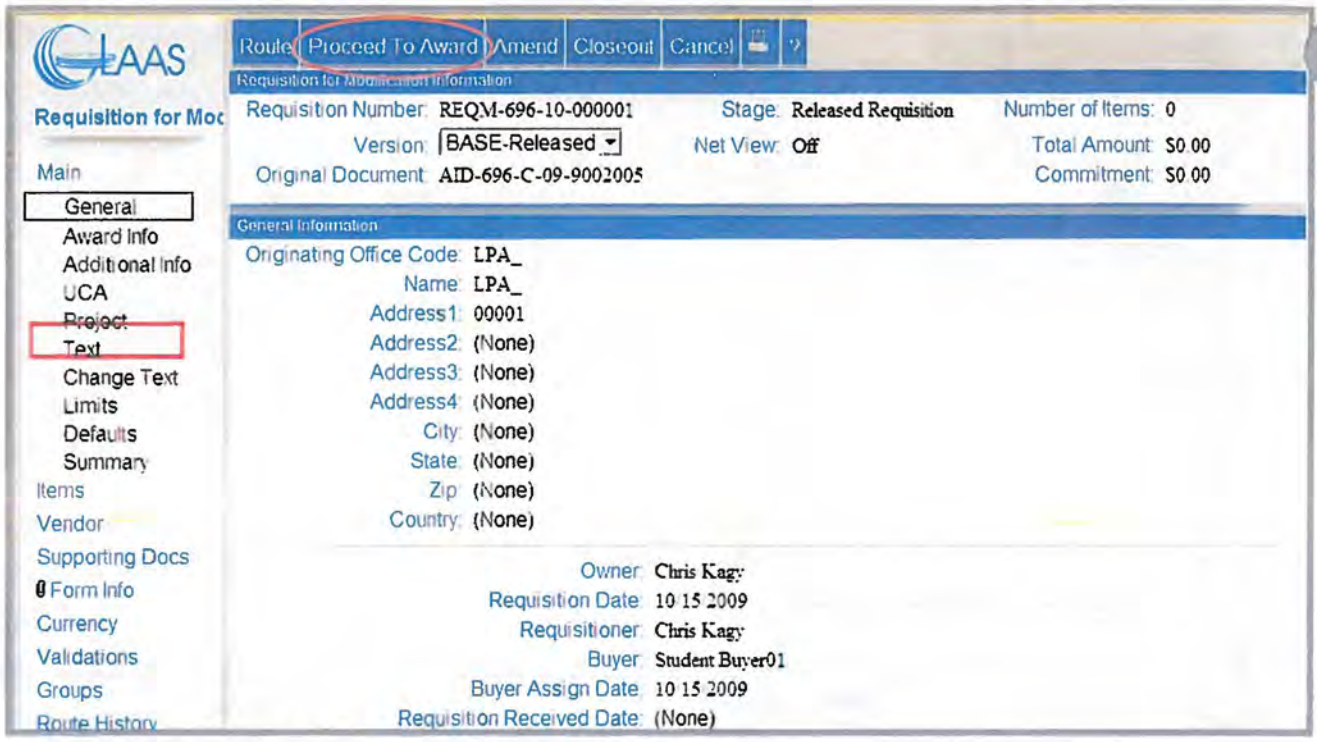


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Review the information for accuracy.	In creating the Requisition for Modification, the Requestor has already entered much of the necessary information. You are reviewing for accuracy.
7.	Main / General	Click the **Text** link on the left-hand menu.	
8.	Main / Text	Review the **Description** and **Header Text** fields (not shown).	**Description** and **Header Text** will contain information concerning the changes to be made in this modification.
9.	Main / Text	Click the **Proceed to Award** toolbar button.	

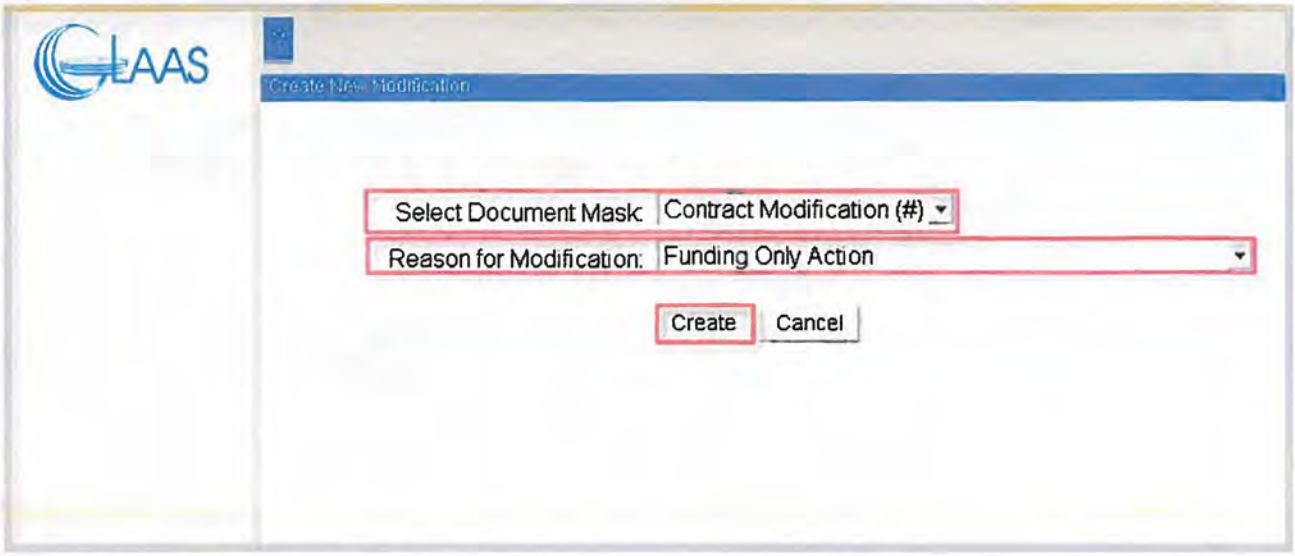


Figure 4: Create New Modification Screen

Steps	Section	User Action	Guidance
10.	Create New Modification	Select the "Contract (or Grant) Modification (#)" **Document Mask**. Select the appropriate **Reason for Modification**.	The **Reason for Modification** selection is transmitted to FPDS-NG for Acquisition Awards. This field does not appear for Assistance Awards.
11.	Create New Modification	Click the **Create** button.	GLAAS processes this Requisition for Modification into an Award modification.

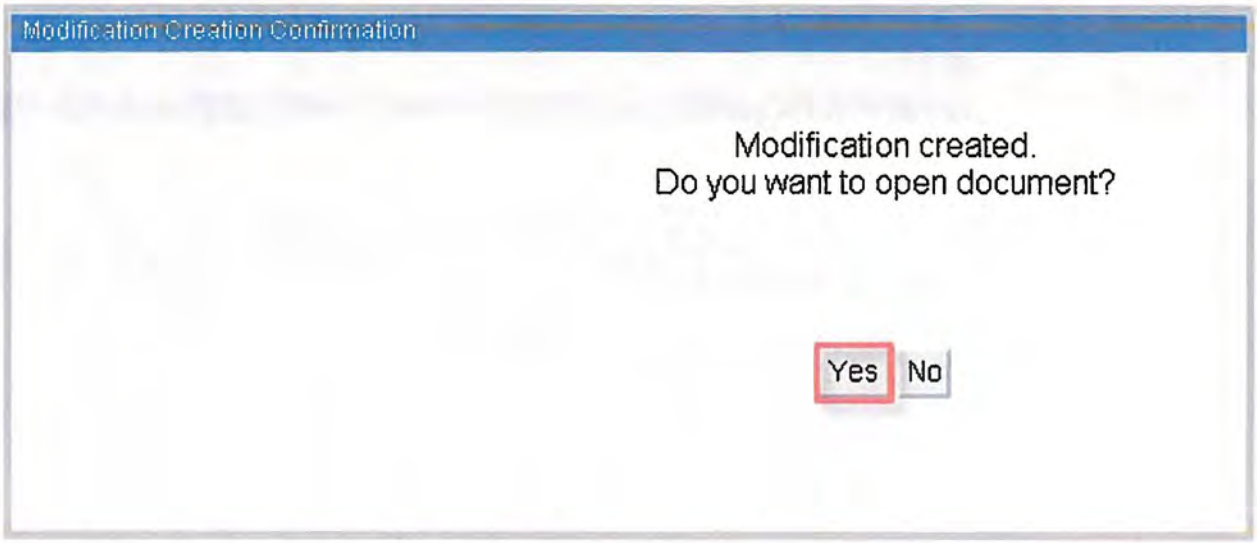


Figure 5: Create New Modification Screen

Steps	Section	User Action	Guidance
12.	Create New Modification	Click the **Yes** button to continue.	

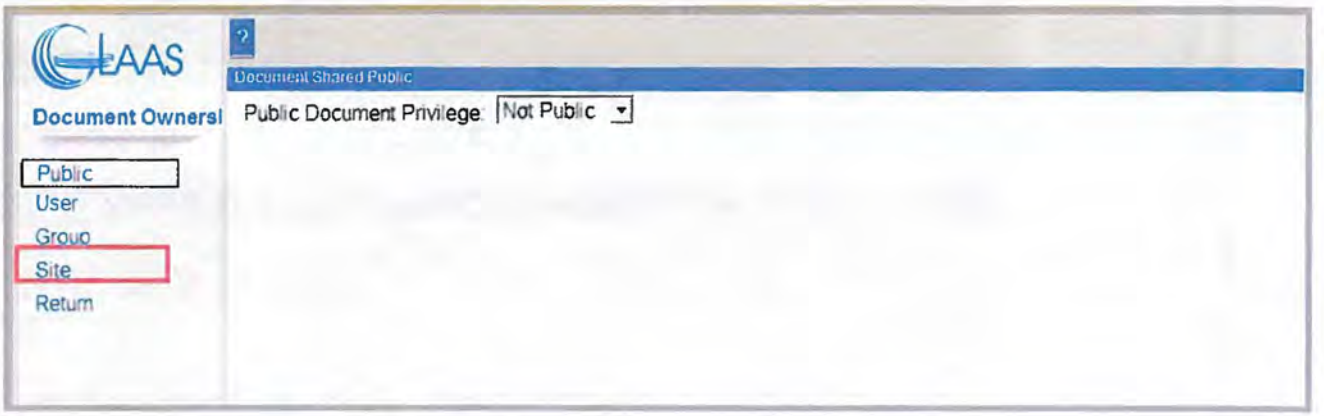


Figure 6: Document Shared Public Screen

Steps	Section	User Action	Guidance
13.	Main / General	Click the **Ownership** link on the left-hand menu (not shown).	While the modification is in process, you must un-share the document with the Admin Office.
14.	Document Shared Public	Click the **Edit** toolbar button (not shown).	
15.	Document Shared Public	Click the **Site** link on the left-hand menu.	

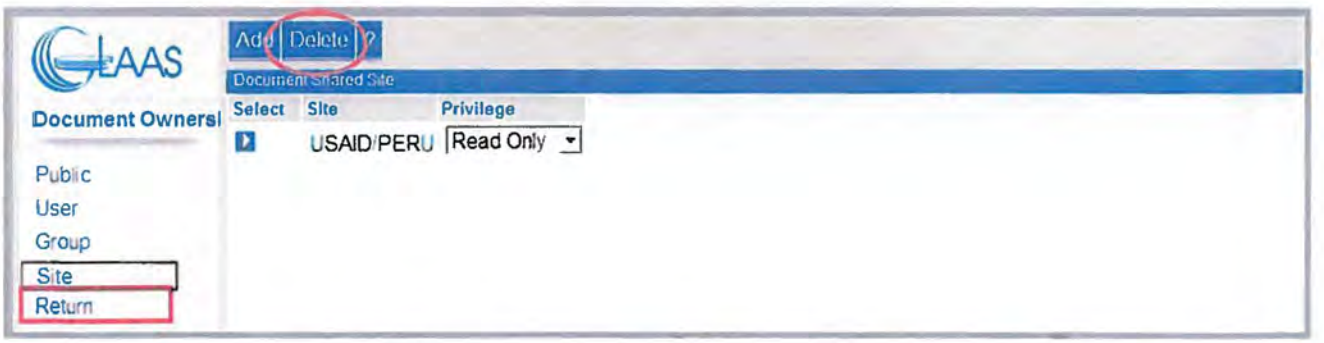


Figure 7: Document Shared Public Screen

Steps	Section	User Action	Guidance
16.	Document Shared Site	Click the **Delete** toolbar button. Click **OK** when asked if you wish to delete the Site (not shown).	
17.	Document Shared Site	Click the **Return** link on the left-hand menu.	
18.	Main / Ownership	Click the **Items** link on the left-hand menu (not shown).	

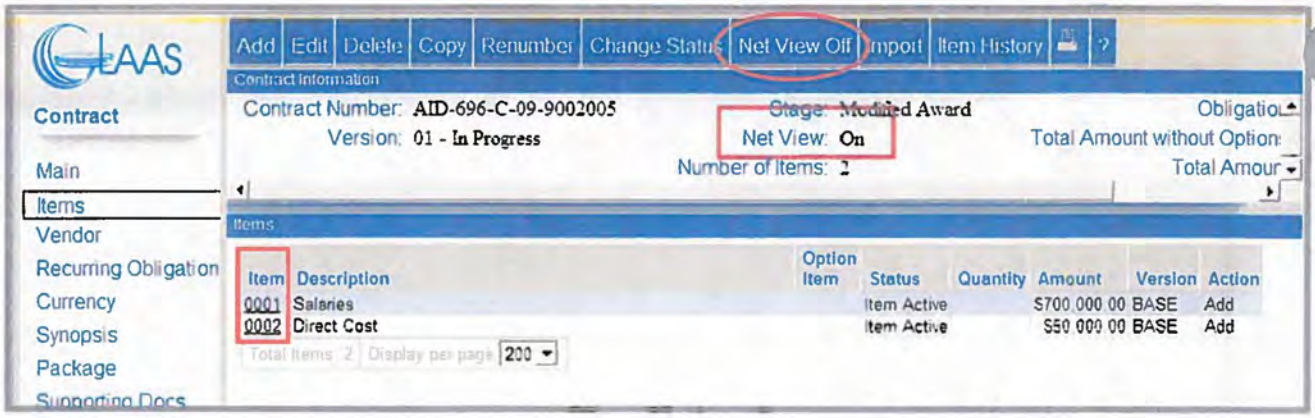


Figure 8: Items Screen

Steps	Section	User Action	Guidance
19.	Items	If New View is off, click the **Net View On** toolbar button (not shown).	Ensure that **Net View** is "On" before you proceed.
20.	Items	If you are processing an administrative modification, skip to **Step 30**. OR If you are processing a de-obligation and/or adjusting the Award TEC, open the line item that requires modification by clicking the **Item** number link.	

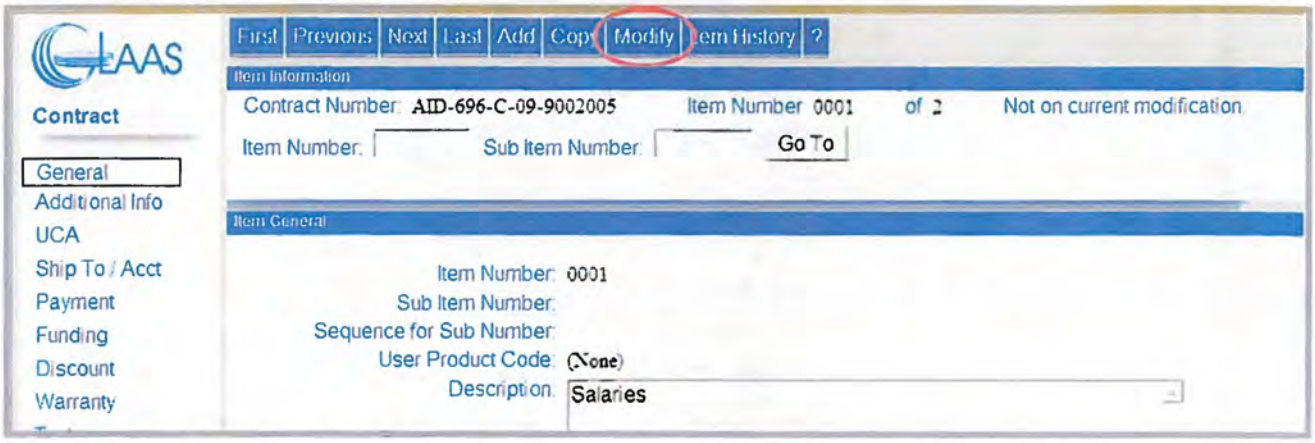


Figure 9: Items / General Screen

Steps	Section	User Action	Guidance
21.	Items / General	Click the **Modify** toolbar button.	

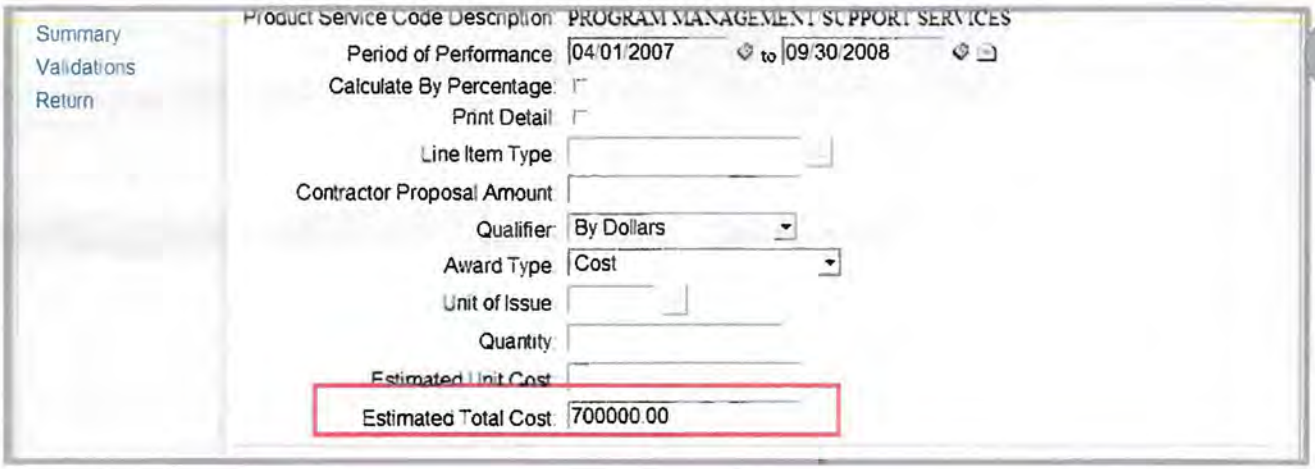


Figure 10: Items / General Screen

Steps	Section	User Action	Guidance
22.	Items / General	If you are changing the CLIN Estimated Amount of an item, the new amount should be entered on the **Items /General** screen. If you are only reducing the obligated value of this item, skip this step and go directly to **Step 23**.	The field name for the amount may be different based upon the **Award Type** selected here (e.g. **Estimated Total Cost, Total Amount**).
23.	Items / General	Click the **Funding** link on the left-hand menu (not shown).	

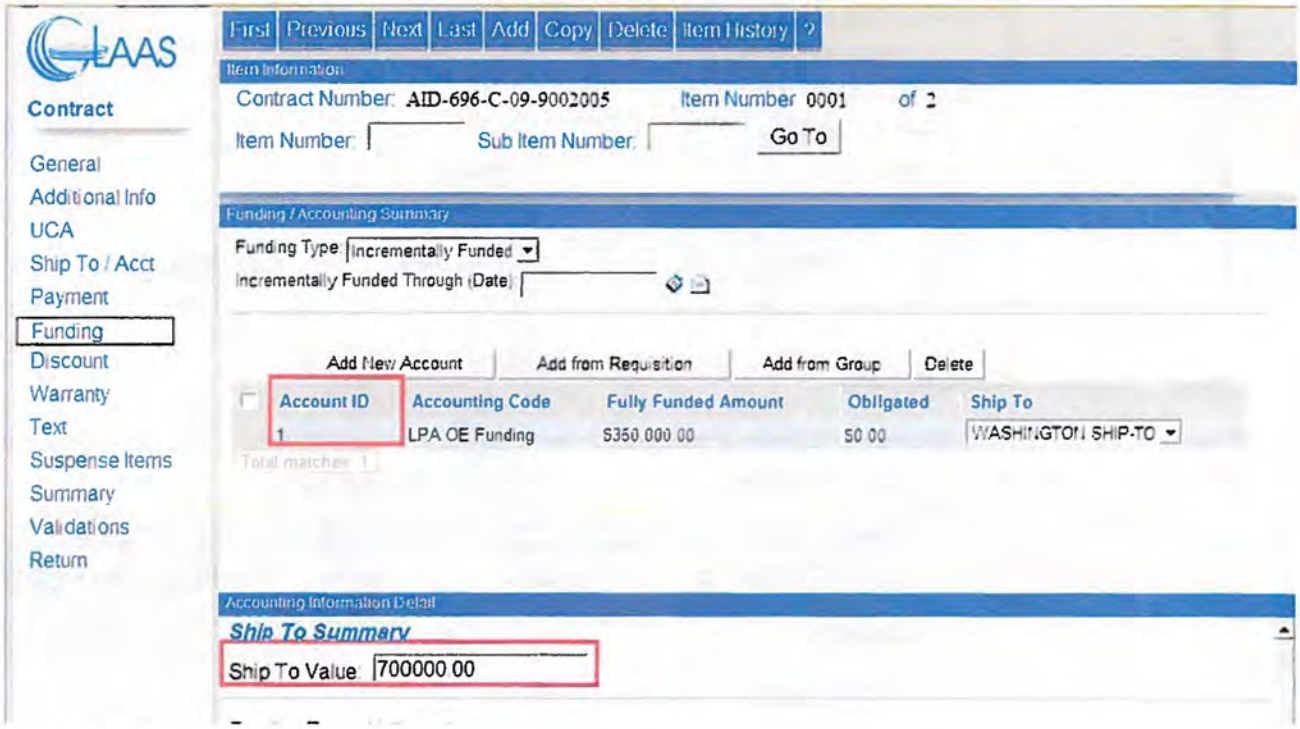


Figure 11: Items / Funding Screen

Steps	Section	User Action	Guidance
24.	Items / Funding	Select the **Account ID** that you want to de-obligate.	
25.	Items / Funding	If you are only reducing the obligated value of this item, skip this step and continue to **Step 26**. If you are reducing the CLIN Estimated Amount of an item, change the amount displayed in the **Ship To Value** field.	

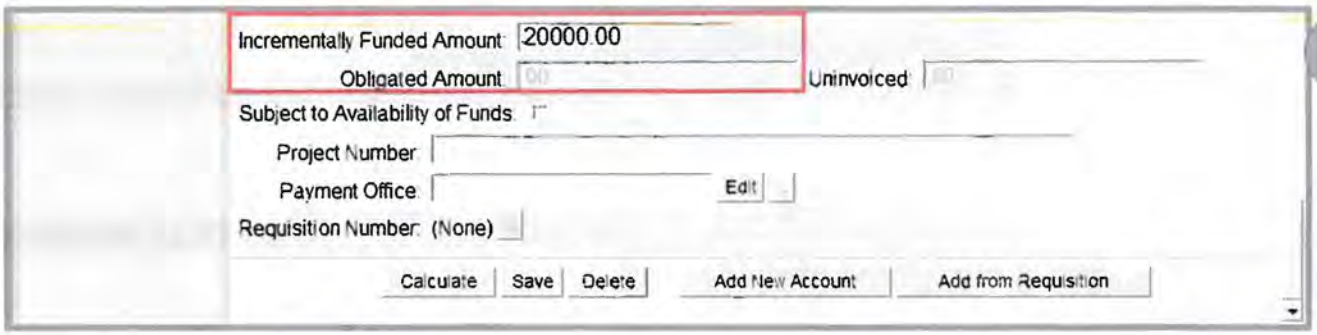


Figure 12: Items / Funding Screen

Steps	Section	User Action	Guidance
26.	Funding / Accounting Summary	Verify whether you have selected "Fully Funded" or "Incrementally Funded" as the **Funding Type** (not shown). Verify that the **Obligated Amount** is "$0.00."	**WARNING!** Do not edit the Phoenix Accounting information when performing the de-obligation.
27.	Accounting Information Detail	If the **Funding Type** was "Fully Funded," update the **Fully Funded Amount** to reflect the net obligation amount. If the **Funding Type** was "Incrementally Funded", update the **Incrementally Funded Amount** to reflect the net obligation amount.	The net obligation amount will be the amount that has been obligated to date against this **Account ID** minus the amount you wish to de-obligate. For example, if you previously obligated $24,390 against **Account ID** "1" and you want to de-obligate $4,390, you would enter $20,000 in the appropriate amount field.
28.	Items / Funding	Click the **Return** link on the left-hand menu (not shown).	
29.	Items	Click the **Main** link on the left-hand menu (not shown).	
30.	Main / General	Click the **Change Text** link on the left-hand menu (not shown).	

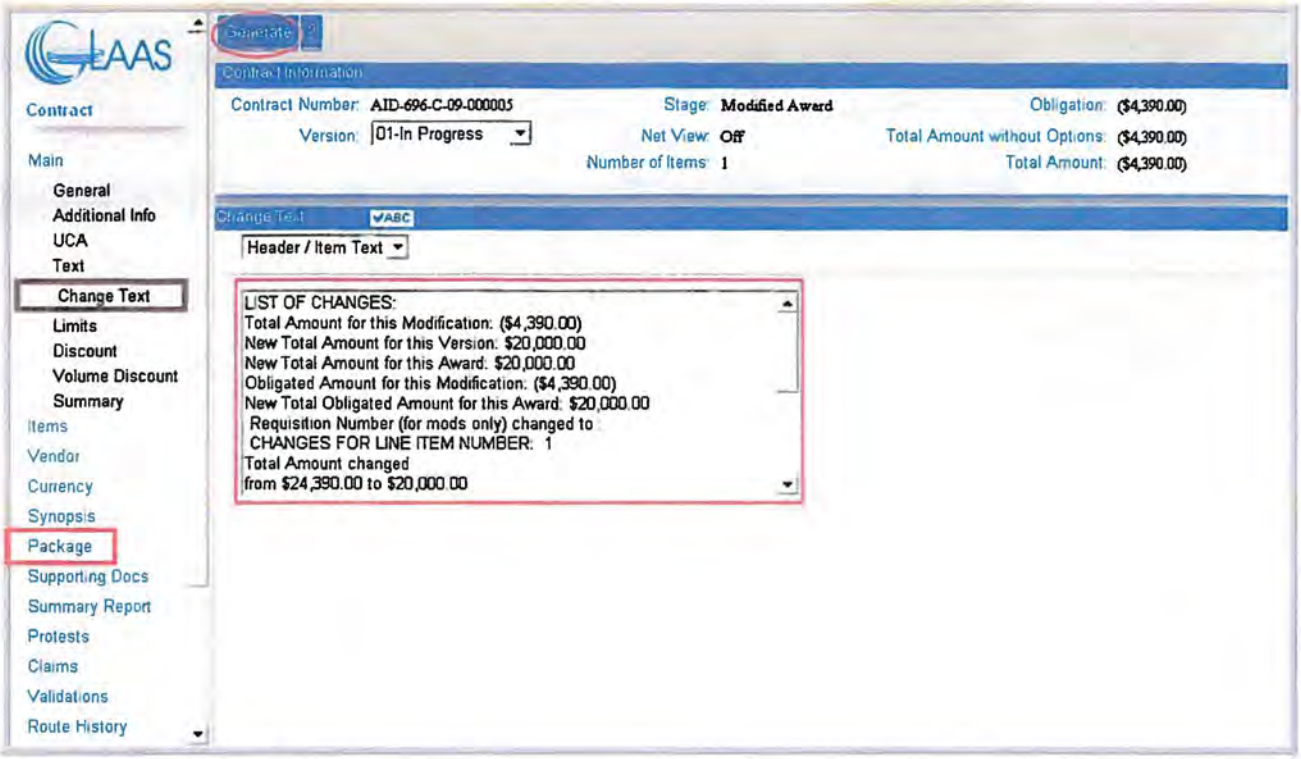


Figure 13: Change Text Screen

Steps	Section	User Action	Guidance
31.	Main / Change Text	Click the **Generate** toolbar button. OR Manually enter the purpose of this modification.	Clicking the **Generate** toolbar button will produce a system-generated list of all the fields that have changed on this modification. You can use the **Generate** toolbar button, manually enter your own text, or edit the system-generated text.
32.	Main / Change Text	Verify that the changes that will be made to this Award appear in the text field.	Any text in this box will display on your Standard Form for this modification. Delete any text that you do not want on your form.
33.	Main / Change Text	Click the **Package** link on the left-hand menu.	

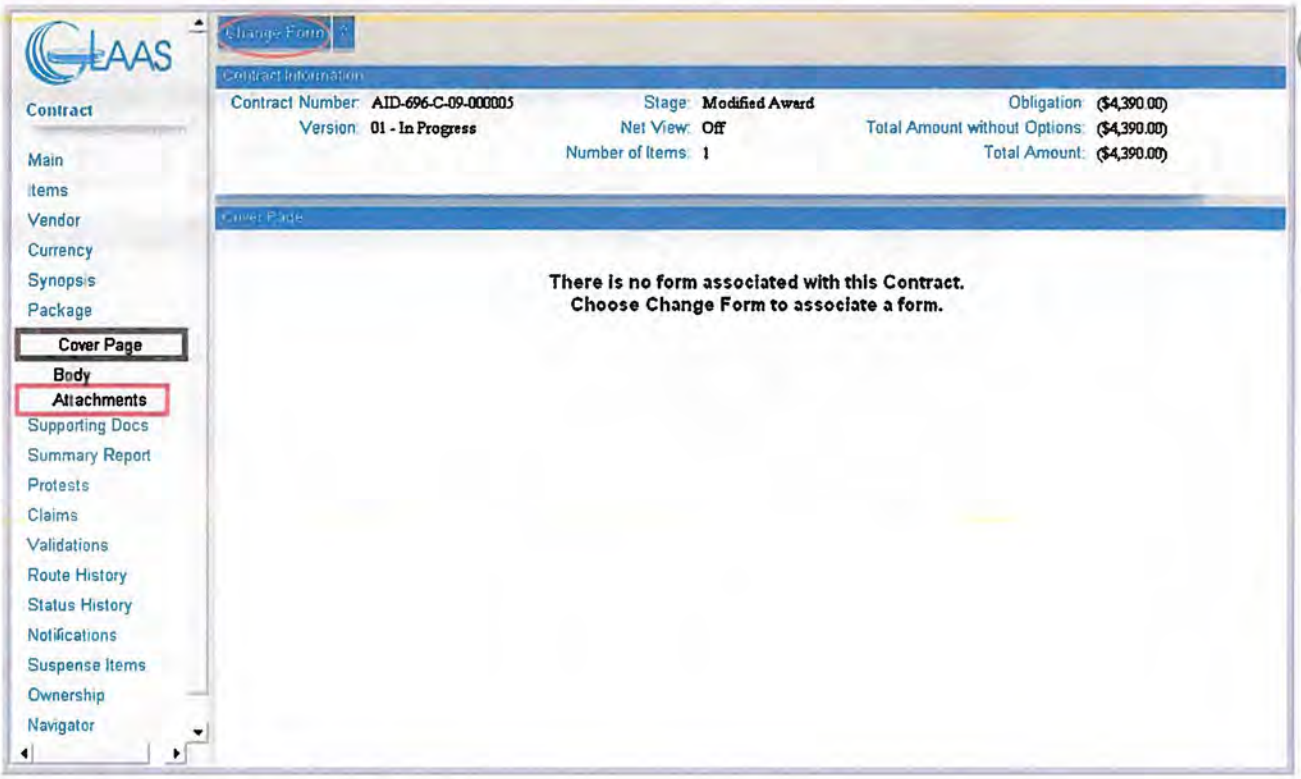


Figure 14: Package / Cover Page Screen

Steps	Section	User Action	Guidance
34.	Package / Cover Page	If you are working on a Contract modification, click the **Change Form** toolbar button. OR If you are modifying an Assistance Award, do not use the GLAAS Cover Page. Instead, click the **Attachments** link on the left-hand menu, add the Assistance modification form located in the GLAAS Library (not shown) and skip to **Step 41**.	Upload any documentation relating to the modification under the **Attachments** or **Supporting Docs** screens. Refer to the *Adding Attachments and Supporting Documentation* user guide for more information.
35.	Package / Cover Page	Select the "SF 30 – Modification of Contract" form (not shown).	

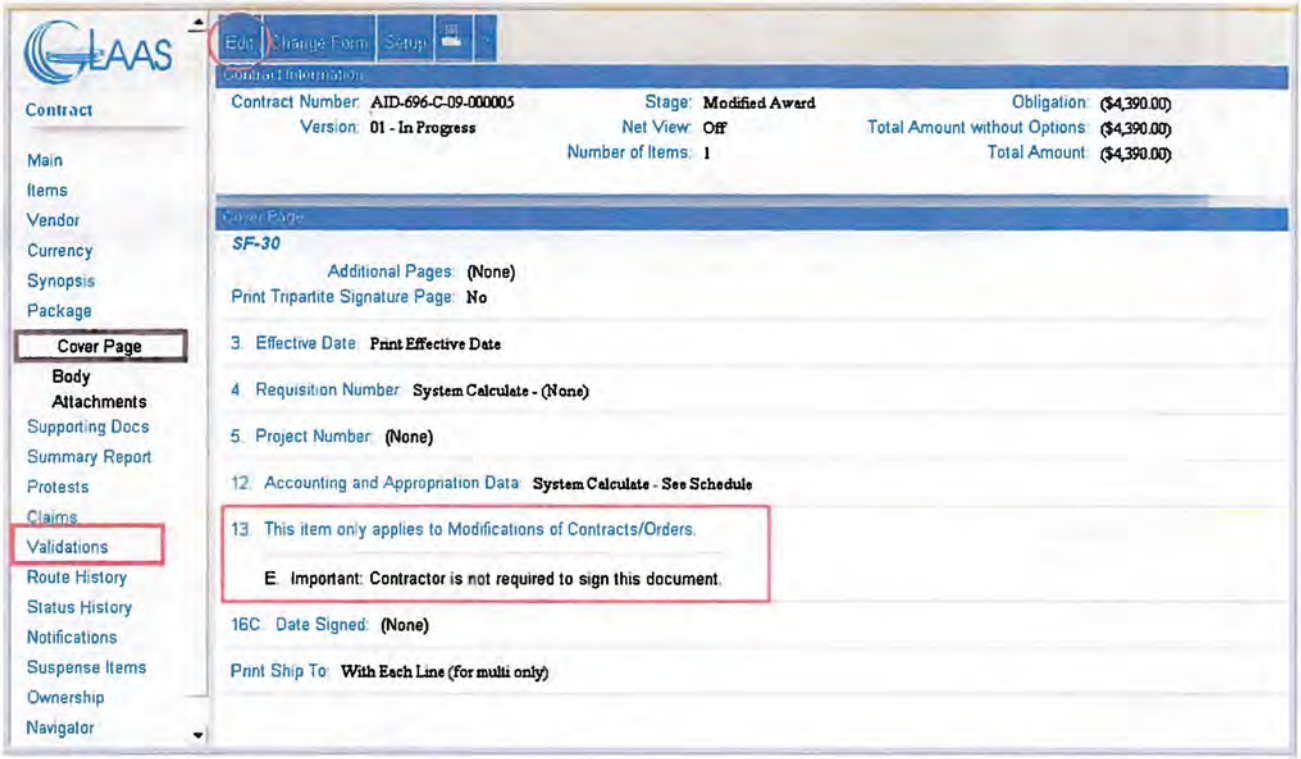


Figure 15: Package / Cover Page Screen

Steps	Section	User Action	Guidance
36.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the **Cover Page**. If you do not edit block 13 you will receive an **Error Message** when you validate this Award in GLAAS. Click the **Submit** button (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
37.	Package / Cover Page	Click the **Validations** link on the left-hand menu. Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item (not shown). **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
38.	Validations	Click the **Main** link on the left-hand menu (not shown).	

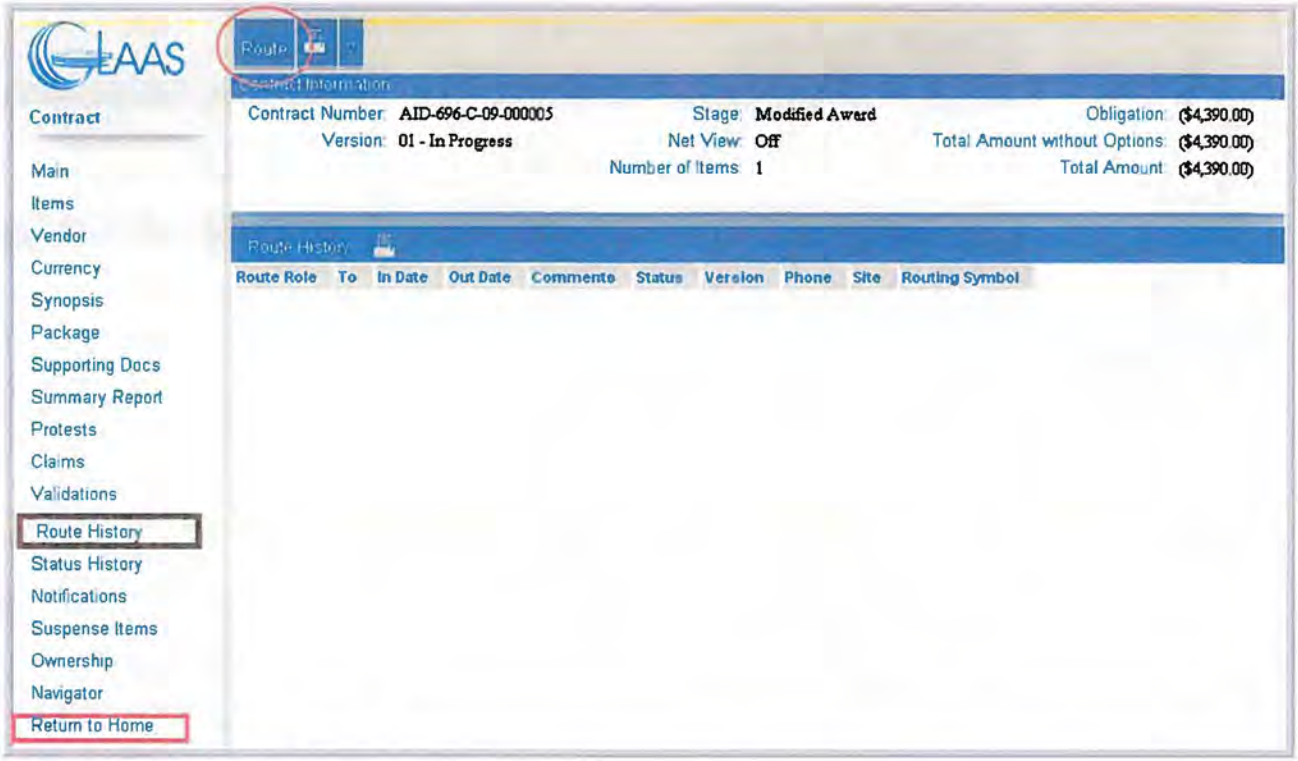


Figure 16: Route History Screen

Steps	Section	User Action	Guidance
39.	Main / General	Click the **FPDS** (Acquisition) or **FAADS** (Assistance) toolbar button (not shown). Update and validate the FPDS-NG or FAADS record prior to routing and approving the Award modification (not shown).	Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for more information.
40.	Main / General	Click the **Route History** link on the left-hand menu (not shown).	
41.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for "Approval" to the Contracting/Agreement Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
42.	Route History	Click the **Return to Home** link on the left-hand menu.	

After the modification has been approved and released by the CO, open the Award and complete the following steps giving the Admin Office access to the Award.

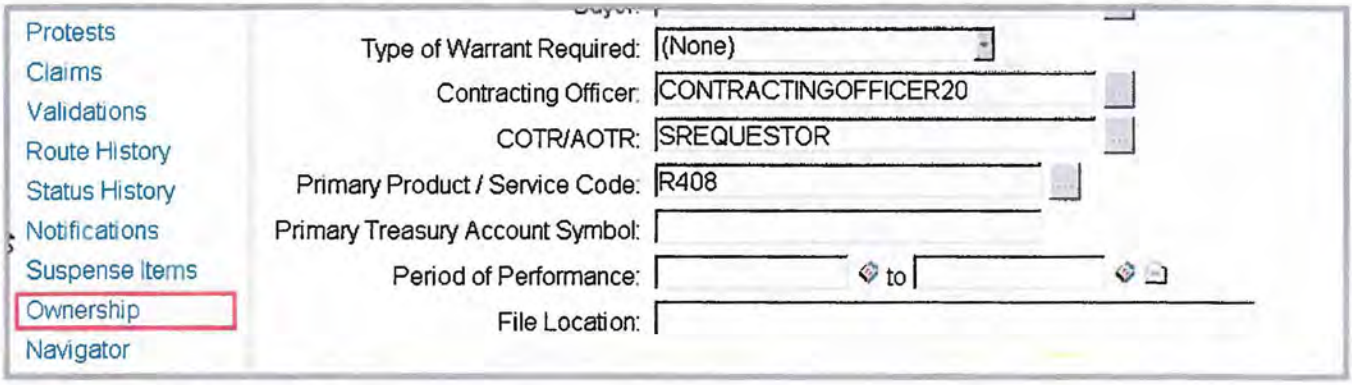


Figure 17: Main / General Screen

Steps	Section	User Action	Guidance
43.	Main / General	Click the **Ownership** link on the left-hand menu.	
44.	Share Document	Click the **Edit** toolbar button (not shown).	

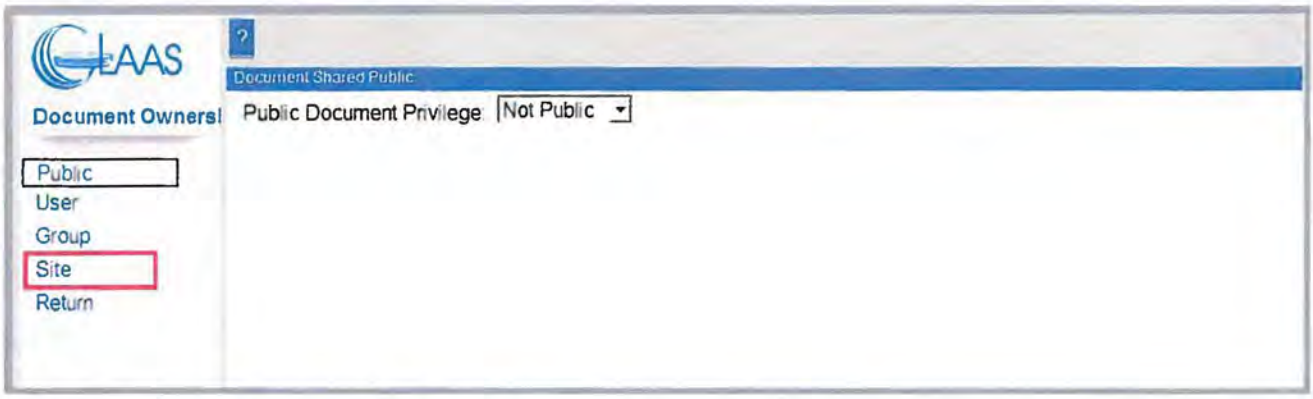


Figure 18: Document Shared Public Screen

Steps	Section	User Action	Guidance
45.	Document Shared Public	Click the **Site** link on the left-hand menu.	
46.	Document Shared Site	Click the **Add** toolbar button (not shown).	

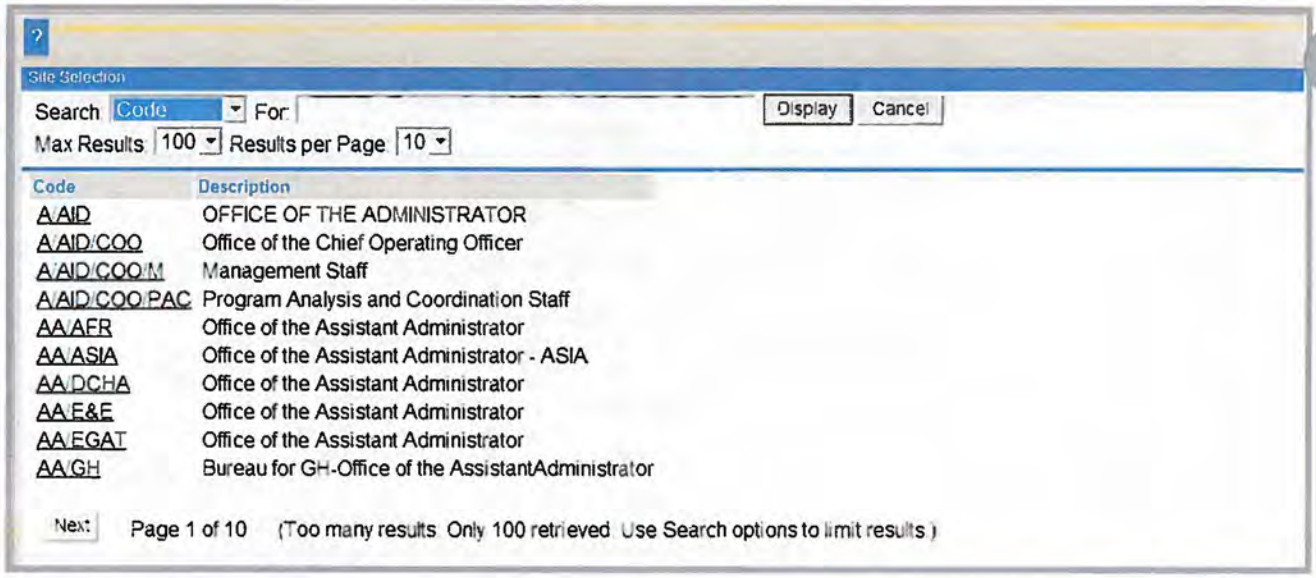


Figure 19: Site Selection Screen

Steps	Section	User Action	Guidance
47.	Site Selection	Search for and select the Contracting/Agreement Officer Technical Representative's (COTR/AOTR) site.	This is the same as the **Admin Office** on the **Main / General** screen.

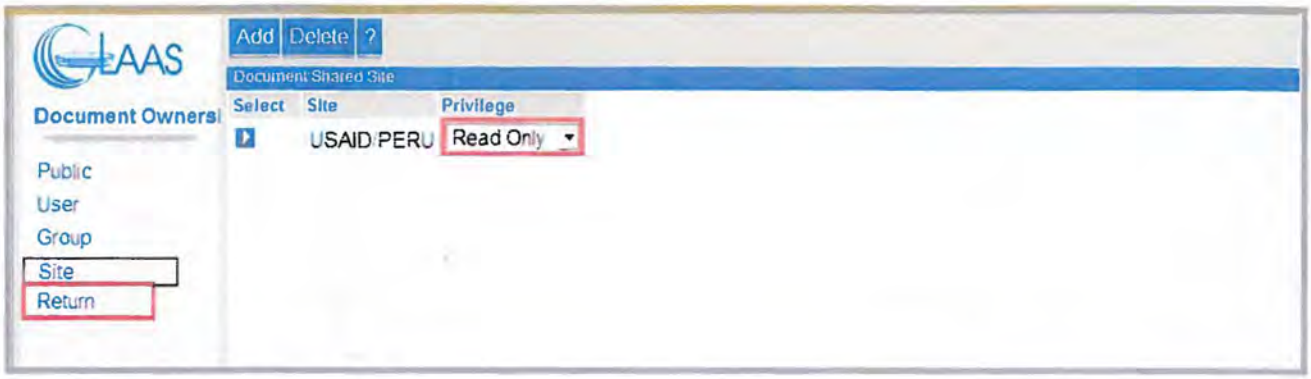


Figure 20: Document Shared Site Screen

Steps	Section	User Action	Guidance
48.	Document Shared Site	Ensure the **Privilege** is "Read Only."	This will allow the Admin Office to view the released Award, and access it to create modifications.
49.	Document Shared Site	Click the **Return** link on the left-hand menu.	
50.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Creating a Solicitation

November 2009

Creating a Solicitation Objectives

- At the end of this topic, you will know how to:
  - Create a Solicitation from a Requisition
  - Add contract clauses and solicitation package documentation
  - Post the Solicitation to FedBizOpps
  - Route the Solicitation
  - Amend a released Solicitation

Creating a Solicitation Process

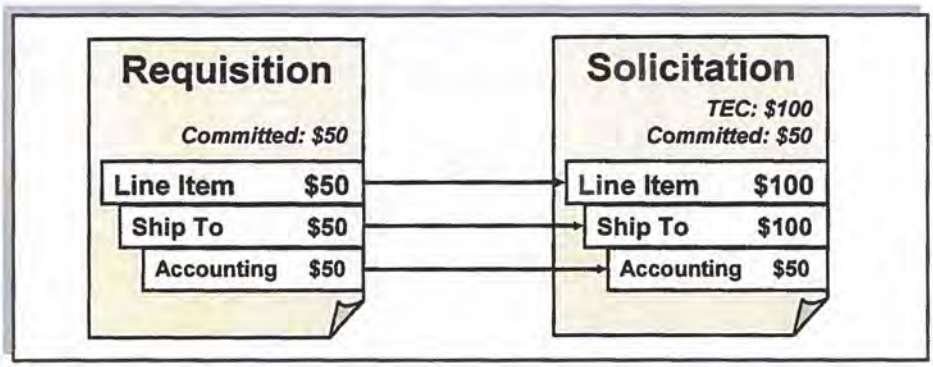
- A Solicitation is created from a Requisition
- The A&A Specialist routes the document to the Contracting Officer for review
- The Contracting Officer will be able to open the Solicitation to edit, approve, and release in GLAAS
- The A&A Specialist will post the released Solicitation to FedBizOpps

Creating Solicitations Roles & Responsibilities

- The A&A Specialist –
  - Creates a Solicitation
  - Sends the synopsis to FedBizOpps
  - Generates contract documentation
  - Enters vendor bids
  - Posts the Solicitation on FedBizOpps after CO approval
- The Contracting Officer –
  - Approves and releases the Solicitation in GLAAS
- The Technical Panel –
  - Evaluates the bids

Total Estimated Cost vs. Commitment Amount

- You will have to upward adjust the line item and Ship To amounts based on the CLIN Estimated Amount



Approving Solicitations

- All Solicitations require a Contracting Officer to be the last reviewer on the route list
- For Solicitations more than $100,000, but less than $10 million, an OSDBU Advisor and a CO are required to approve the document (AID/W only)
- For Solicitations more than $10 million, the Contract Review Board, the OSDBU Advisor and CO are all required to approve the document
- Missions may establish additional policies for routing and approving Solicitations
- Solicitations must be released in GLAAS and posted separately to FedBizOpps

GLAAS 102 USER GUIDE:

CREATING A SOLICITATION FROM A REQUISITION

PURPOSE:

This user guide will show you the steps you must complete in order to create a Solicitation from a Requisition.

BEFORE STARTING:

1. In order to create a Solicitation from a Requisition, you must be an A&A Specialist or Contracting Officer.
2. A Requisition must have been created, approved and released.
3. You should have created a Milestone Plan and associated it to the Requisition for this action.

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel.**	

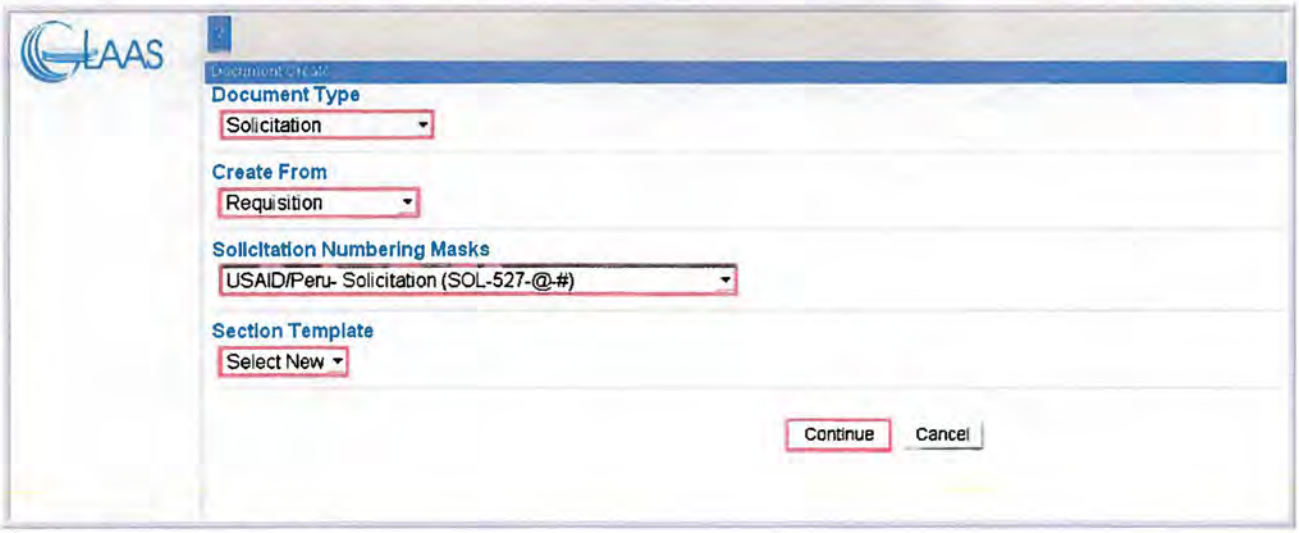


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Solicitation." • **Create From:** Select "Requisition." • **Solicitation Numbering Masks:** Select a Numbering Mask. • **Section Template:** Choose "Select New" to load a clause template now or select "None" to add a template later.	You will create a Solicitation from a Requisition. Choosing "Select New" in the **Section Template** field tells GLAAS to show you a list of Clause Templates. You pick and choose Clause Templates to create the Body of the Solicitation. You will not be prompted here to pick a Clause Template if you choose "None." Clause templates can be selected at any time in the Package Body.
4.	Document Create	Click the **Continue** button.	

Figure 3: Create Solicitations from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Solicitations from Requisition	Search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor. Clear the **Site** field when searching for a document or a user.

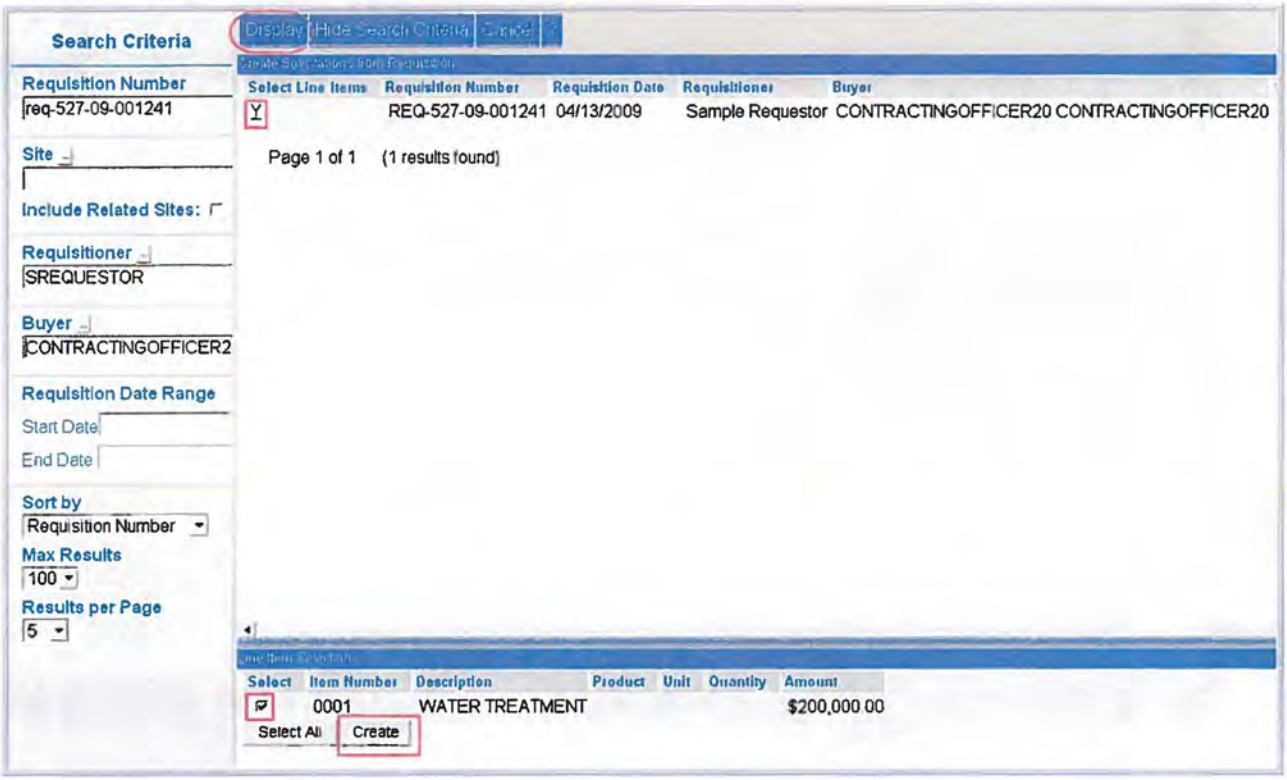


Figure 4: Create Solicitations from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Solicitations from Requisition	Click the **Y** in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
7.	Create Solicitations from Requisition	Check the box in the **Select** column for each line item you want to pull into the Contract from the Requisition. Click the **Create** button.	

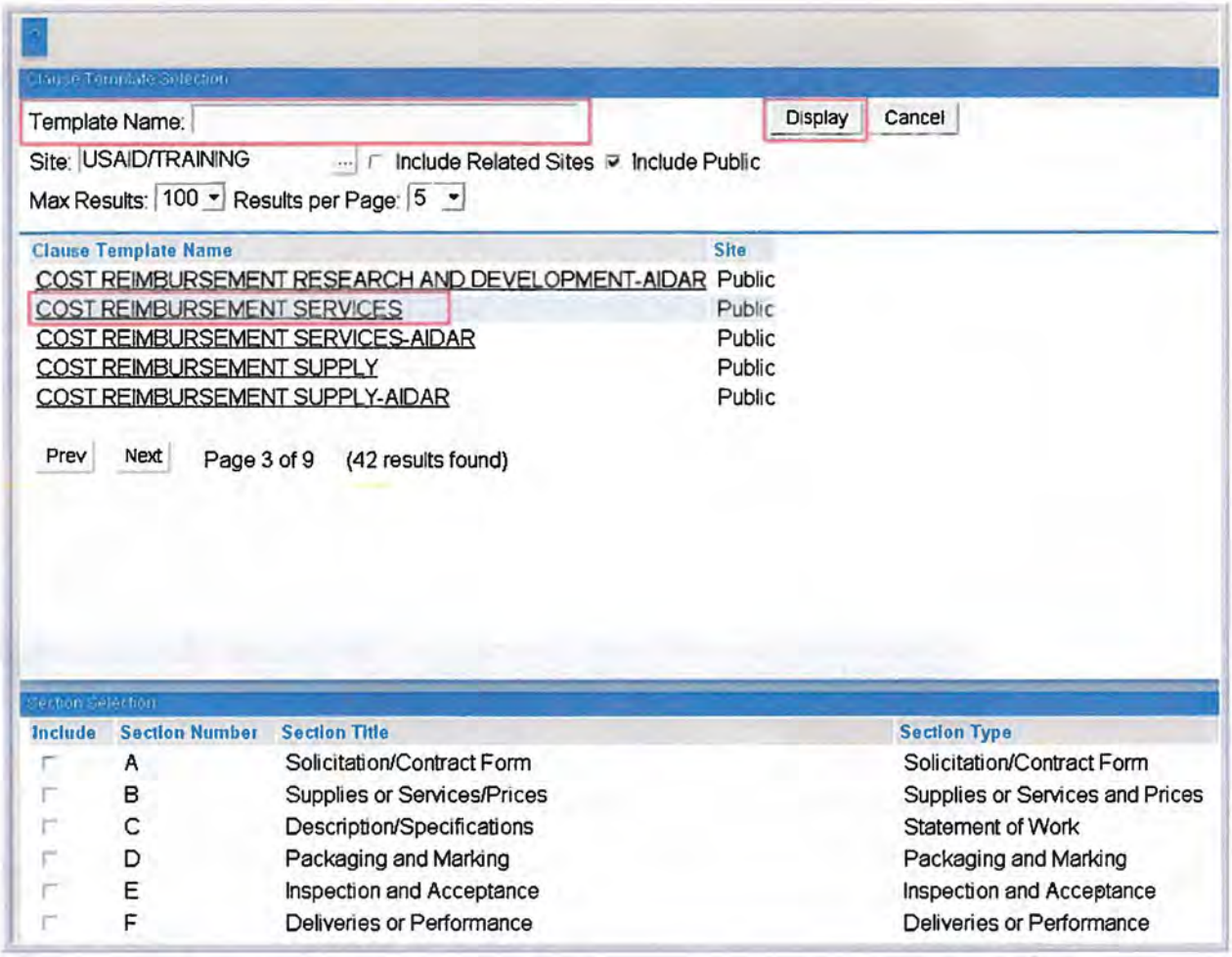


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Search for a Clause Template by **Template Name.** Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause Templates include the basic FAR and AIDAR clauses you need for a Contract. You must add the FAR clauses first; you will add the AIDAR clauses later.

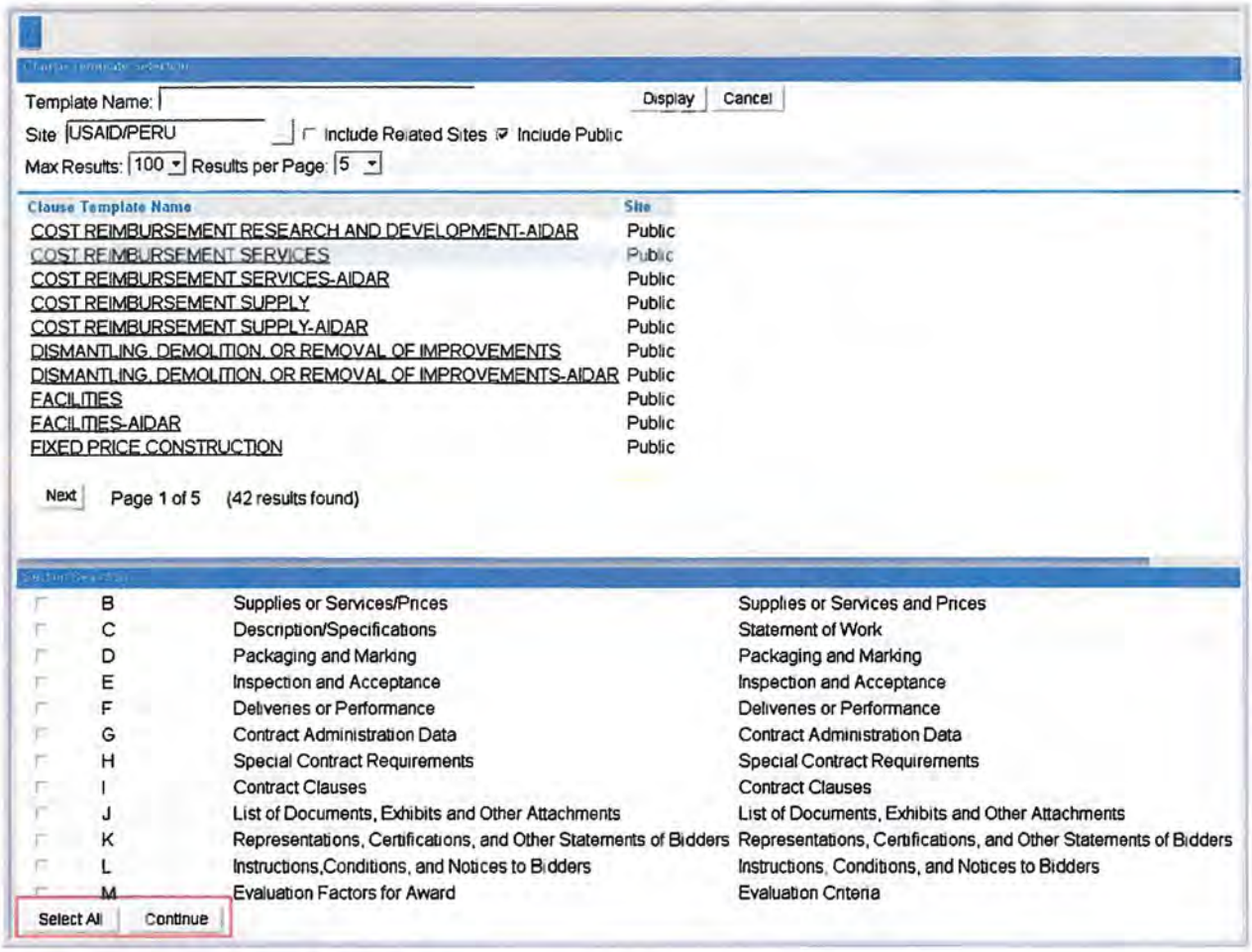


Figure 6: Clause Template Selection Screen

Steps	Section	User Action	Guidance
9.	Clause Template Selection	Click the **Select All** button to include all of the clause sections in your Solicitation. OR Check or uncheck the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS Solicitation or Award. .
10.	Clause Template Selection	Click the **Continue** button to pull the clauses into your Solicitation.	

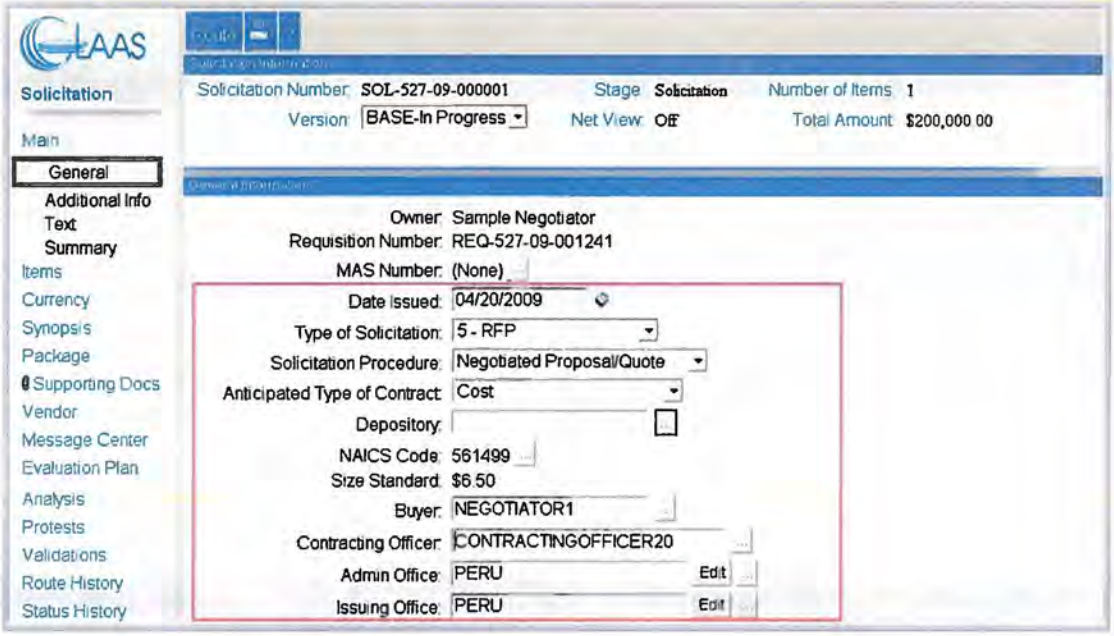


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Date Issued:** Enter the date the Solicitation will be issued. — R **Type of Solicitation:** Select the type of Solicitation being created. — R **Solicitation Procedure:** Select the submission procedure for the Solicitation. — R **Anticipated Type of Contract:** Select the type of contract to be awarded. — R **NAICS Code:** Click the lookup button (...) to select the appropriate code. — R **Buyer:** Select the User ID of the appropriate A&A Specialist. — R **Contracting Officer:** Select the User ID of the Contracting Officer. — R **Admin Office:** Select the code for the COTR's office. — R **Issuing Office:** Select the code for the contracting office. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. USAID is not currently using the **Depository** field.

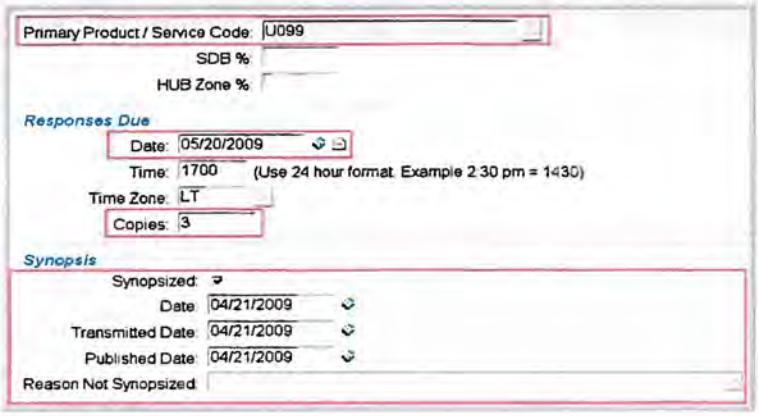


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
12.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Primary Product/Service Code:** Select an appropriate code from the list. — R **SDB %:** Type a whole number 1-100 representing a preference calculation for SDB. — O **HUB Zone %:** Type a whole number 1-100 representing a preference calculation for HUB Zone. — O **Date:** Enter the date the vendors must submit their Bids/Responses. — R **Copies:** Enter the number of Bid/Response copies to be received. — R **Synopsized:** Check this box if you plan to synopsize. — R/O **Date:** Enter the date on which the contract action was synopsized. — R/O **Transmitted Date:** Enter the date the action was sent to FBO to be published. — R/O **Published Date:** Enter the date the action was published by FBO. — R/O **Reason Not Synopsized:** Enter a reason if you do not synopsize the Solicitation. — R/O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If this Solicitation does not need to be synopsized on FedBizOpps (FBO): • Leave the **Synopsized** checkbox unchecked. • **Reason Not Synopsized** is required if you do not synopsize the Solicitation.
13.	Main / General	Click **Additional Info** link on the left-hand menu (not shown).	

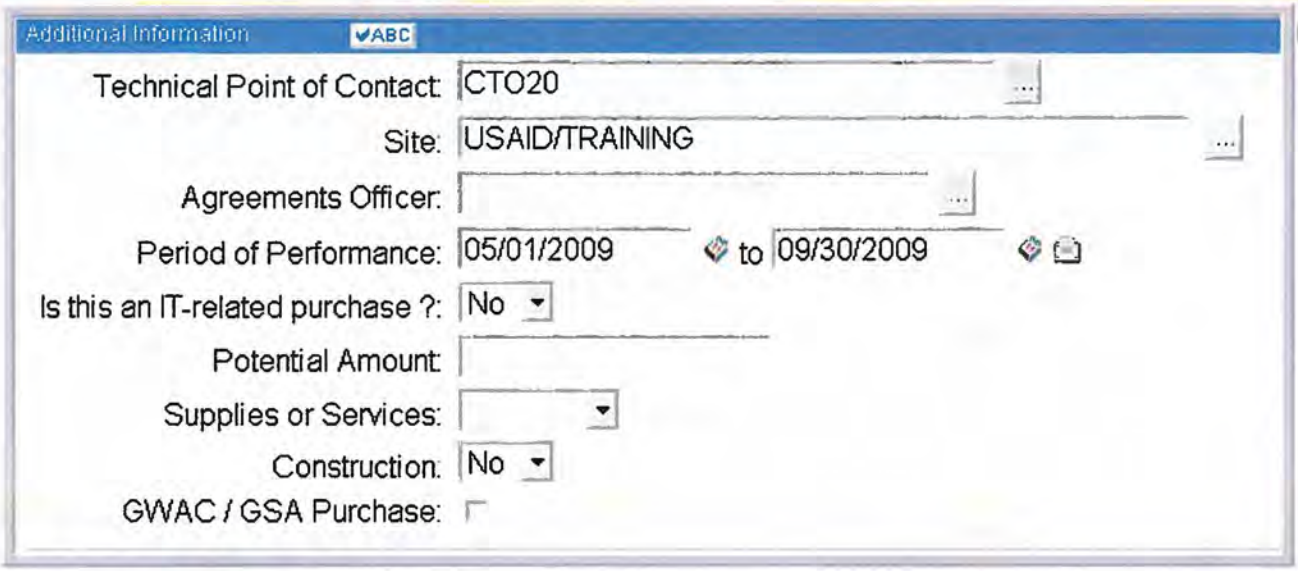


Figure 9: Main / Additional Info Screen

Steps	Section	User Action		Guidance
14.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Potential Amount** • **Supplies or Services:** Leave field blank. • **Construction** **GWAC/GSA Services:** Leave field unchecked.
		Technical Point of Contact: Add or change the point of contact if necessary.	O	
		Agreements Officer: Leave this field blank.	N/A	
		Period of Performance: Add or change the effective and completion dates if necessary.	O	
		Is this an IT-related purchase?: Select "Yes" if this is IT related.	O	

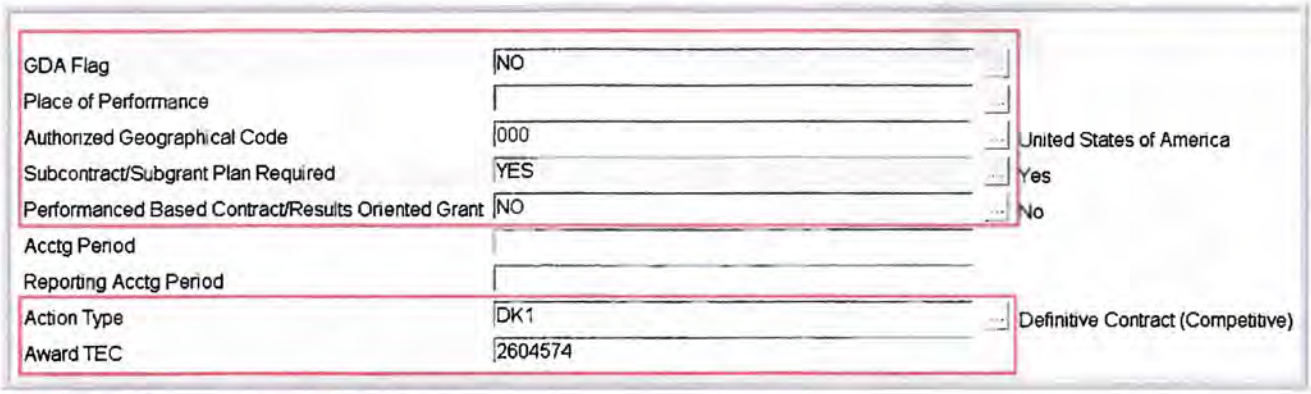


Figure 10: Main / Additional Info Screen

Steps	Section	User Action	Guidance
14. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **GDA Flag:** Select "YES" if the Solicitation is a Global Development Alliance action. — R **Place of Performance:** Enter the three-digit code indicating the country where the work will be performed. — R **Authorized Geographical Code:** Enter the three-digit code indicating the country that is authorizing the work to be done. — R **Subcontract/Subgrant Plan Required:** Select "YES" if a subcontracting plan is required. — R **Performance Based Contract/Results Oriented Grant:** Select "YES" if this will be a performance-based contract. — R **Action Type:** Enter the code that identifies the type of procurement action. — R **Award TEC:** The total estimated cost of the award is copied forward from the Requisition. — R	The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters. If the award is incrementally funded, the **Award TEC** amount will be greater than the committed amount. This is the Requestor's way to specify the award TEC and an indicator for you to upward adjust the amount on the Solicitation.
15.	Additional Info	Click the **Text** link on the left-hand menu (not shown).	

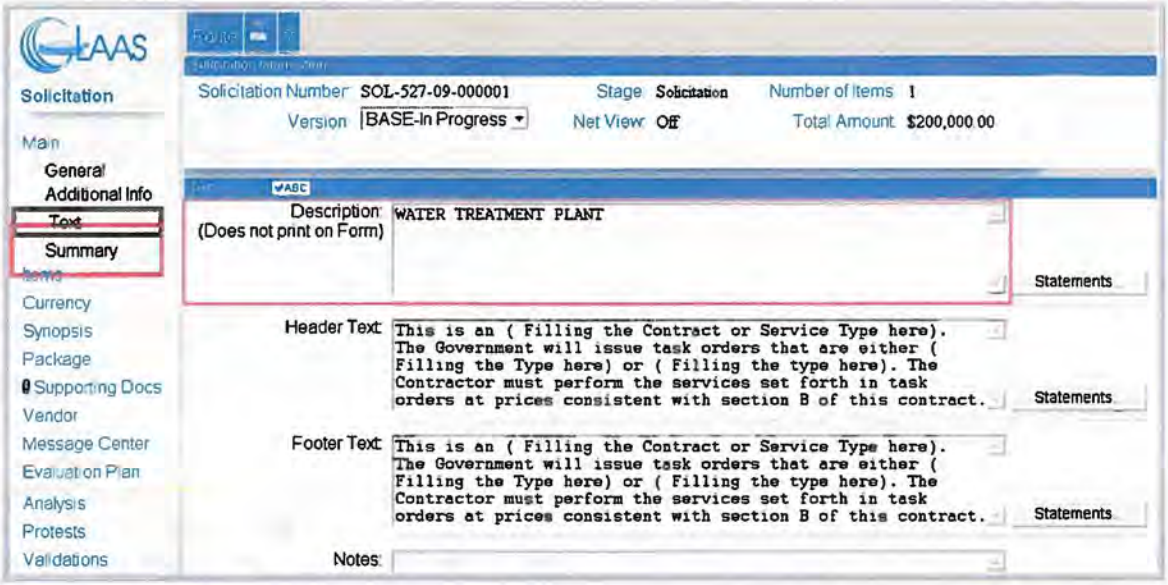


Figure 11: Main / Text Screen

Steps	Section	User Action	Guidance
16.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be advertised with this Solicitation. The information will not print on the Solicitation form. — R **Header Text:** Enter header text or click the **Statements** button to the right of the field and select header text. The information will appear immediately above the line item information on the Solicitation form. — O **Footer Text:** Enter footer text or click the **Statements** button to the right of the field and select footer text. The information will appear immediately below the line item information on the Solicitation form. — O **Notes:** Enter notes or click the **Statements** button to the right of the field and select notes. The information will not appear on the Solicitation form. — O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Use the **Main / Text** screen to enter text that applies to all line items in the Solicitation. You can also cut and paste text information into these fields. Each field will hold up to seven typed pages. The **Statements** button contains standard language and can be edited once loaded in the field.
17.	Main / Text	Click the **Summary** link on the left-hand menu.	

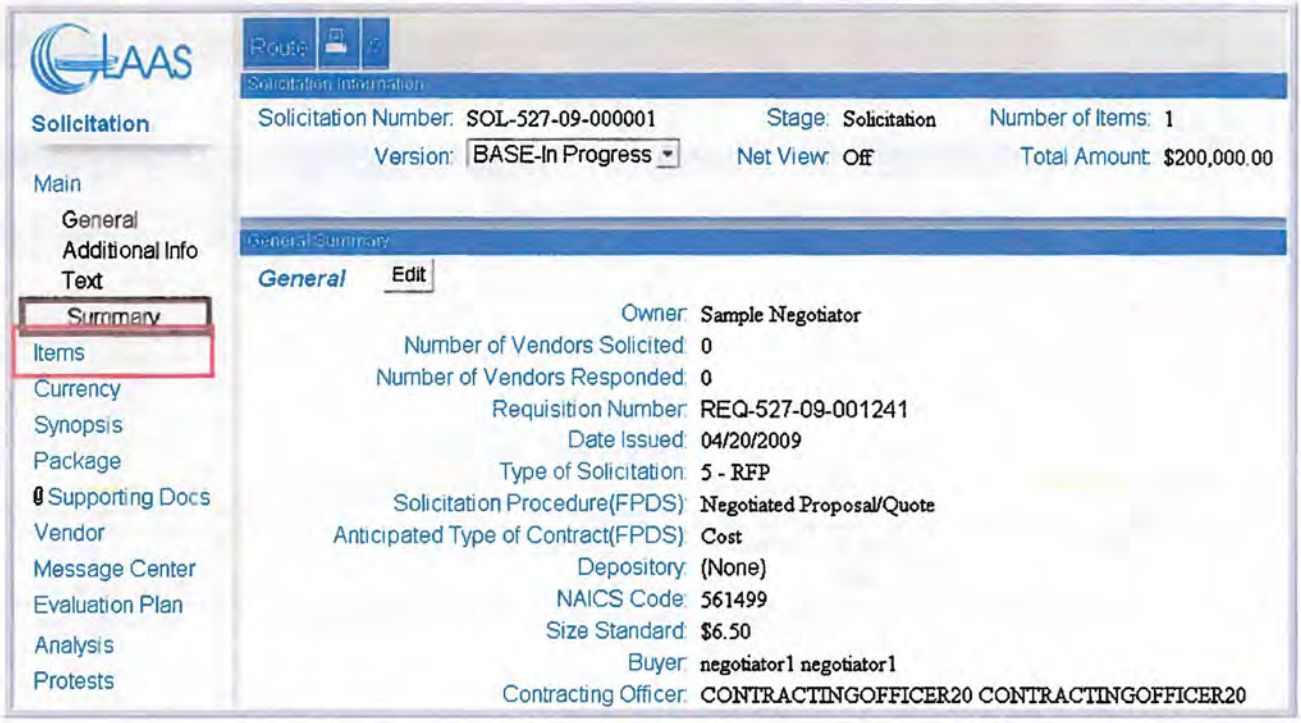


Figure 12: Main / Summary Screen

Steps	Section	User Action	Guidance
18.	Main / Summary	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your document thus far. Click the various **Edit** buttons (Edit) to make any changes.
19.	Main / Summary	Click the **Items** link on the left-hand menu.	

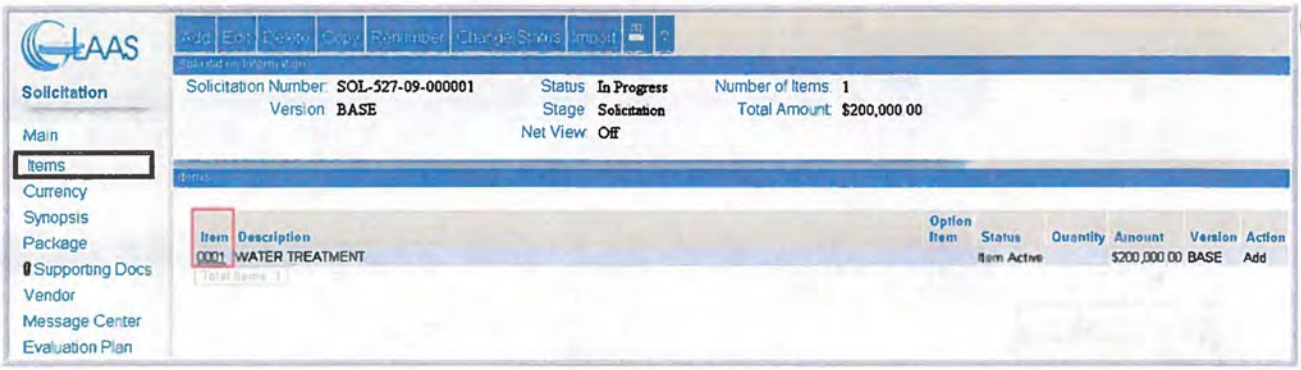


Figure 13: Items Screen

Steps	Section	User Action	Guidance
20.	Items	Click an **Item** number link to view Item Details.	

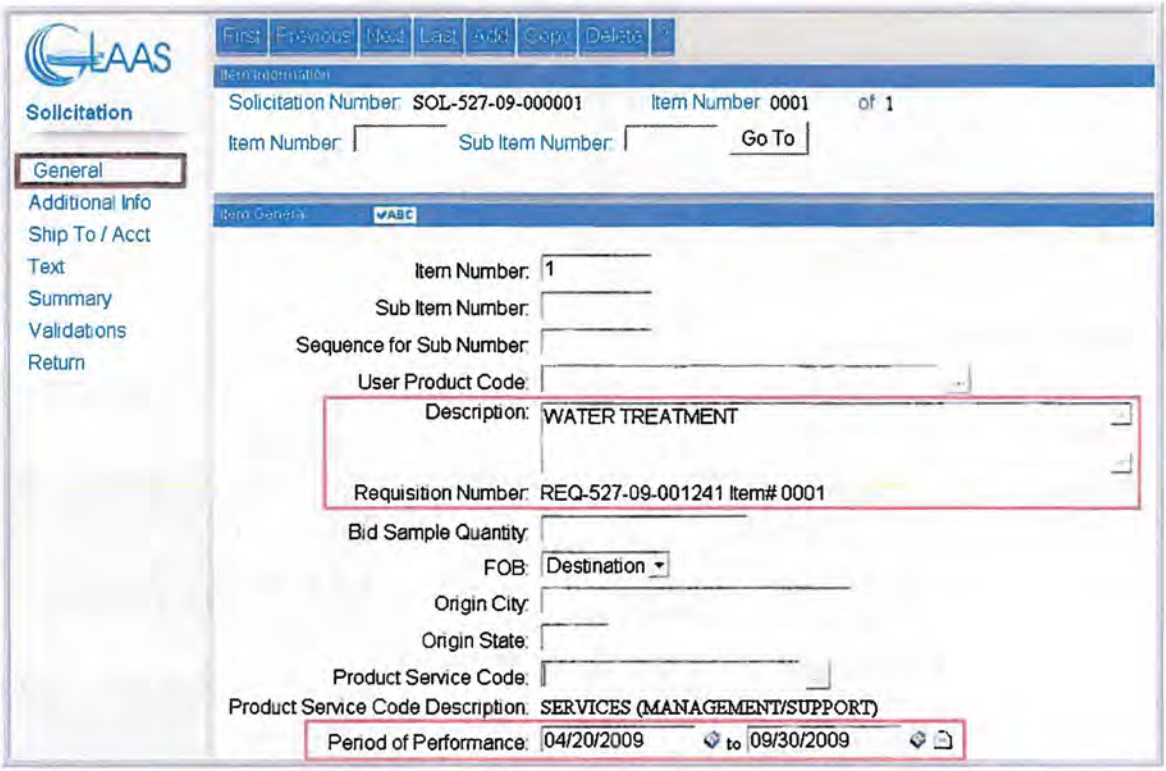


Figure 14: Items / General Screen

Steps	Section	User Action	Guidance
21.	Items / General	Complete the following Required (R) and/or Optional (O) fields:	USAID is not currently using these fields: • **Sub Item Number** • **Sequence for Sub Number** • **User Product Code**

Description: Enter a description for the item.	R
Requisition Number: The system will display the linked Requisition information.	R
Bid Sample Quantity: If ordering Supplies, enter the sample amount you would like to receive with the bid.	O
FOB: GLAAS defaults to "Destination" for shipping responsibility. If "Origin" is selected, then the **Origin City** and **Origin State** fields must be entered.	O
Product / Service Code: Enter the code to identify the product or service being ordered.	O
Period of Performance: Enter the effective and completion dates for the item.	R

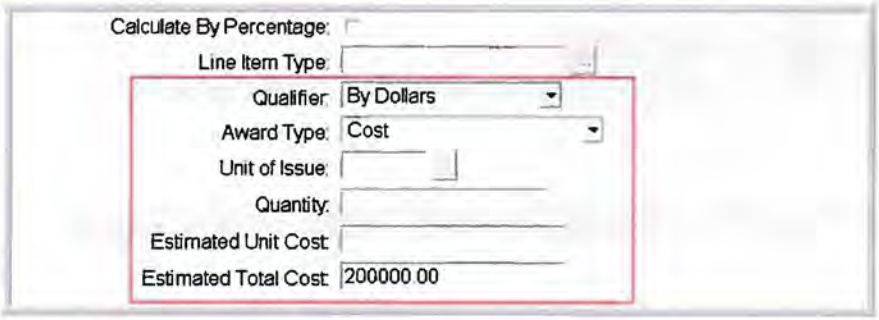


Figure 15: Items / General Screen

Steps	Section	User Action	Guidance
21. cont.	Items / General	Complete the following Required (R) and/or Optional (O) fields: **Line Item Type:** Select an appropriate type if applicable. — O **Qualifier**: Do not change the entry, which defaults from the Requisition. — R **Award Type:** Select the Award Type. Based upon this selection some additional fields may appear or will be labeled differently. — R **Unit of Issue/Quantity/Est. Unit Cost:** If "By Quantity" was selected on the Requisition as the **Qualifier**, these are required fields. — R/O **Estimated Total Cost**: Enter the total estimated cost for this item. If "By Dollars" was selected on the Requisition as the **Qualifier**, this field is read/write. If "By Quantity" was selected on the Requisition as the **Qualifier**, the amount in this field will auto-populate. — R	Based on the **Award Type**, this screen may have additional fields. The **Estimated Total Cost** is the committed amount from the Requisition. If the **Award Type** is "Fixed Price", the committed amount would populate the **Amount** field (not shown). If the award will be incrementally funded, adjust the Solicitation line item amounts to reflect the total estimated cost for the award, which will be greater than the committed amount. This value can be found on the **Award TEC** field on the **Main / Additional Info** screen. If adjusting the dollar amounts from the Requisition, you will need to do it in two places for each line item: • Adjust the line item **Estimated Total Cost** on the **Items / General** screen. • Adjust the **Ship To Amount** on the **Items / Ship To** screen (not shown). USAID is not currently using the **Calculate By Percentage** field.
22.	Items / General	Click the **Additional Info** link on the left-hand menu (not shown).	

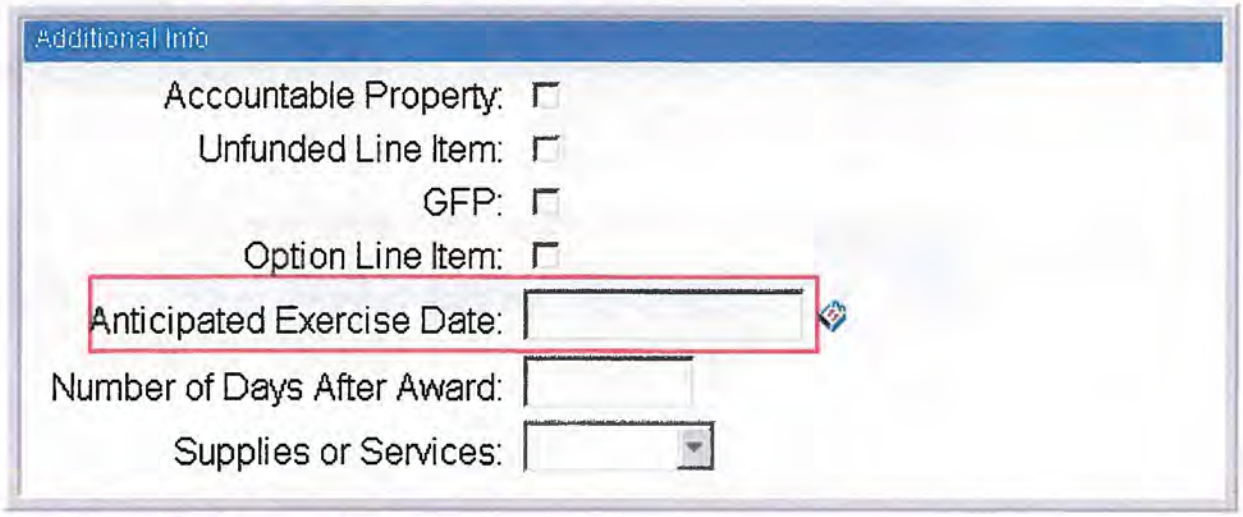


Figure 16: Items / Additional Info Screen

Steps	Section	User Action	Guidance
23.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Unfunded Line Item:** Check this box if this line item will not have any funding associated with it and to zero out the committed value of the item. — O **GFP:** Check this box if the item is Government Furnished Property and to zero out the value of this item. — O **Option Line Item:** Select this checkbox if this is an option line item and to zero out the committed value of the item. — O **Anticipated Exercise Date:** If the Option Line Item is selected, you are required to enter the date you think you will exercise this option. Or enter the **Number of Days After Award** you expect to exercise this option. — R/O	USAID is not currently using these fields: • **Accountable Property** • **Supplies or Services**
24.	Additional Info	Click the **Ship To / Acct** link on the left-hand menu (not shown).	

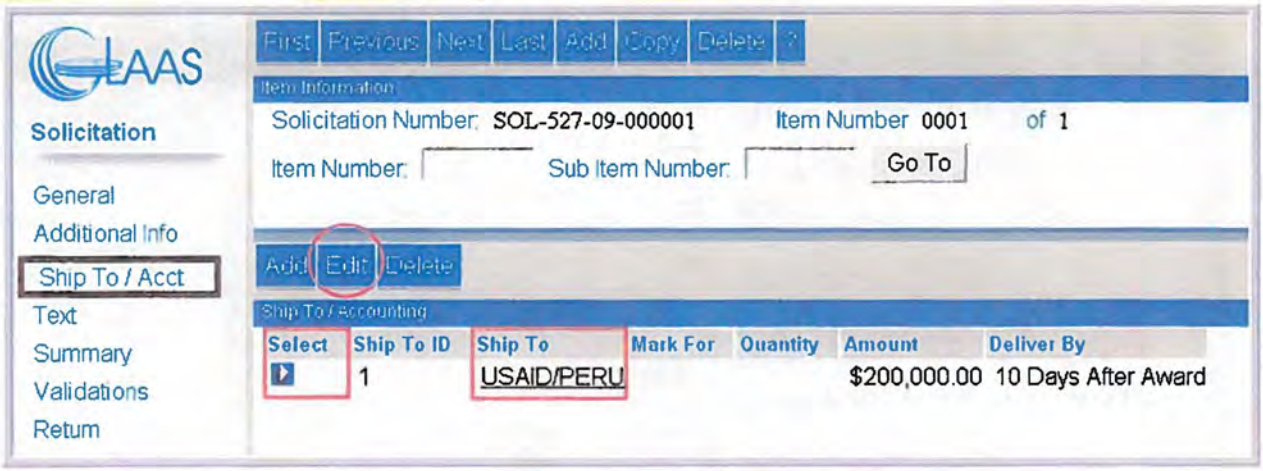


Figure 17: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
25.	Items / Ship To / Acct	To change the **Ship To Amount**: Select a Ship To and click the **Edit** toolbar button OR Click the **Ship To** link.	The **Ship To Amount** will be the committed amount from the Requisition.

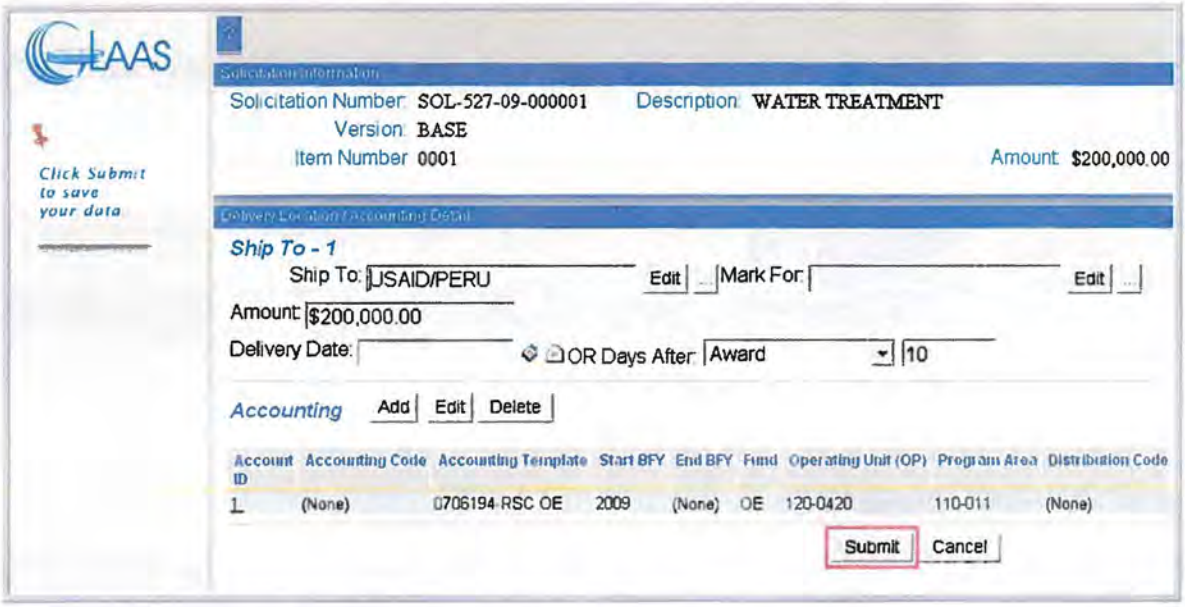


Figure 18: Delivery Location / Accounting Detail Screen

Steps	Section	User Action	Guidance
26.	Delivery Location / Accounting Detail	Edit the **Delivery Date / OR Days After** if necessary.	The **Ship To Amount** will be the committed amount from the Requisition. The Accounting information is copied from the Requisition. This represents the committed amount for this Solicitation line item. Do not change the Accounting information in a Solicitation. **WARNING!** Changing the funding information in a Solicitation will prevent you from processing your GLAAS Award and will cause problems with reconciliation.
27.	Delivery Location / Accounting Detail	Click the **Submit** button to save your changes.	

Figure 19: Ship To / Accounting Screen

Steps	Section	User Action	Guidance
28.	Ship To / Acct	Click the **Text** link on the left-hand menu.	The **Ship To / Acct** screen should reflect any changes you made on the **Delivery Location / Accounting Detail** screen.

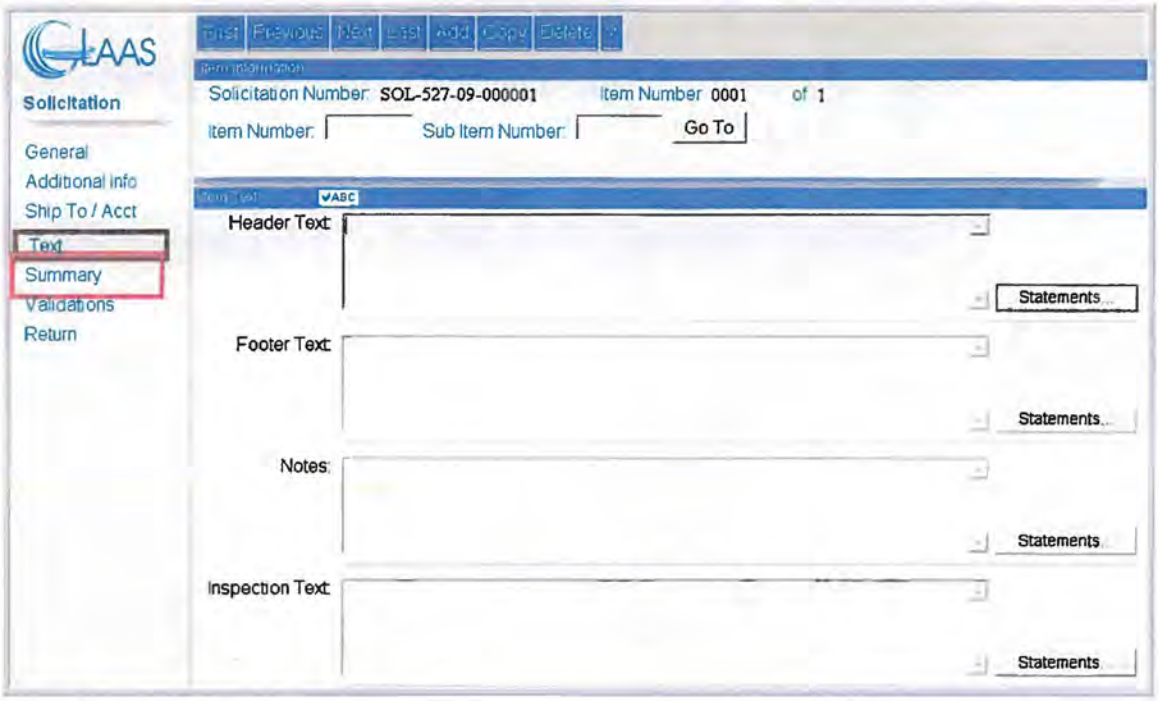


Figure 20: Items / Text Screen

Steps	Section	User Action	Guidance
29.	Item Text	Complete the following Required (R) and/or Optional (O) fields: **Header Text:** Enter header text or click the **Statements** button to the right of the field and select header text. The information will appear immediately above the line item information on the Solicitation form. — O **Footer Text:** Enter footer text or click the **Statements** button to the right of the field and select footer text. The information will appear immediately below the line item information on the Solicitation form. — O **Notes:** Enter notes or click the **Statements** button to the right of the field and select notes. The information will not appear on the Solicitation form. — O	Use the **Items / Text** screen to enter text that only applies to this particular line item. **WARNING!** Delete text that should not be viewed by external audiences such as CLIN Total Estimated Amounts. You can cut and paste text from other documents into the GLAAS text fields. Each field will hold up to seven typed pages. The **Statements** button contains standard language and can be edited once loaded in the field. Both the **Header Text** and the **Footer Text** will carry forward to the Award. USAID is not currently using the **Inspection Text** field.
30.	Item Text	Click the **Summary** link on the left-hand menu.	

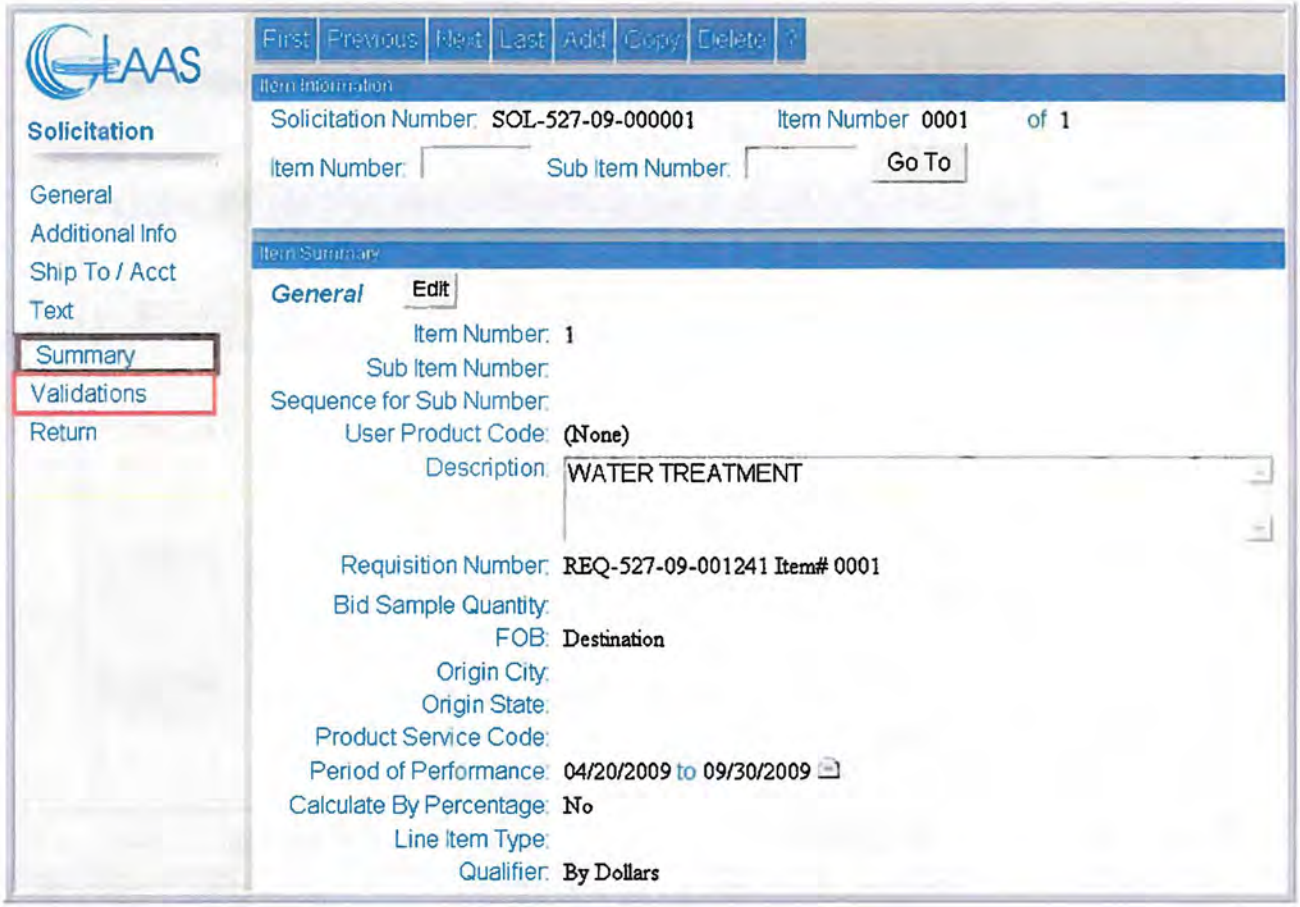


Figure 21: Items / Summary Screen

Steps	Section	User Action	Guidance
31.	Item Summary	Review the **Item Summary** screen to verify that all information is accurate.	The **Summary** screen displays information that has been entered so far Click the **Edit** button (Edit) on this screen if something needs to be changed.
32.	Item Summary	Click the **Validations** link on the left-hand menu.	

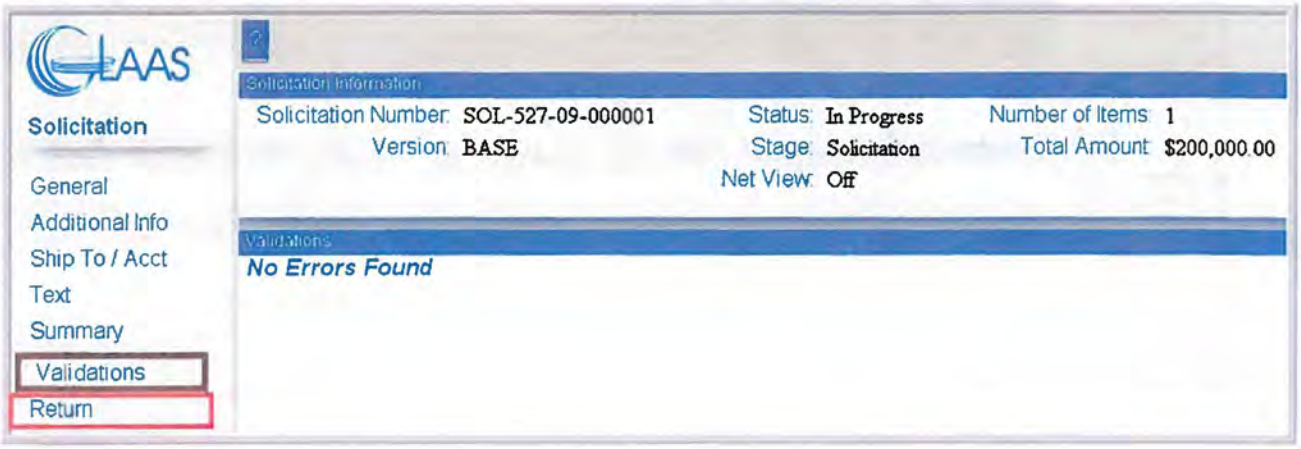


Figure 22: Items / Validations Screen

Steps	Section	User Action	Guidance
33.	Items / Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item.	The **Validations** screen appears with a list of **Error Messages** and/or a list of **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
34.	Items / Validations	Click the **Return** link on the left-hand menu.	

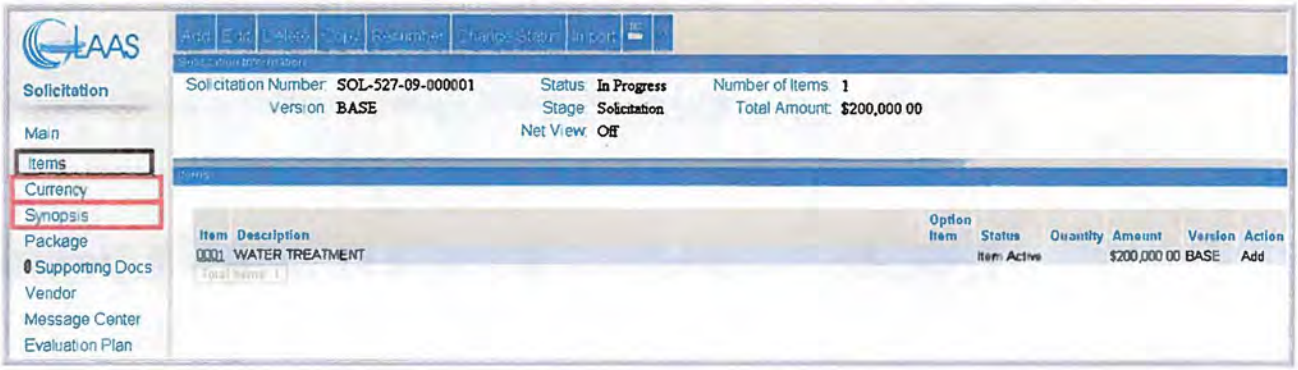


Figure 23: Items Screen

Steps	Section	User Action	Guidance
35.	Items	Repeat **Steps 20-34** if you need to Edit/Review additional items.	
36.	Items	Click the **Currency** link on the left-hand menu.	Refer to the userguide *Creating a Contract from a Requisition* for instructions on adding a foreign print currency.
37.	Currency	Click the **Synopsis** link on the left-hand menu to synopsize this Solicitation for FedBizOpps (not	

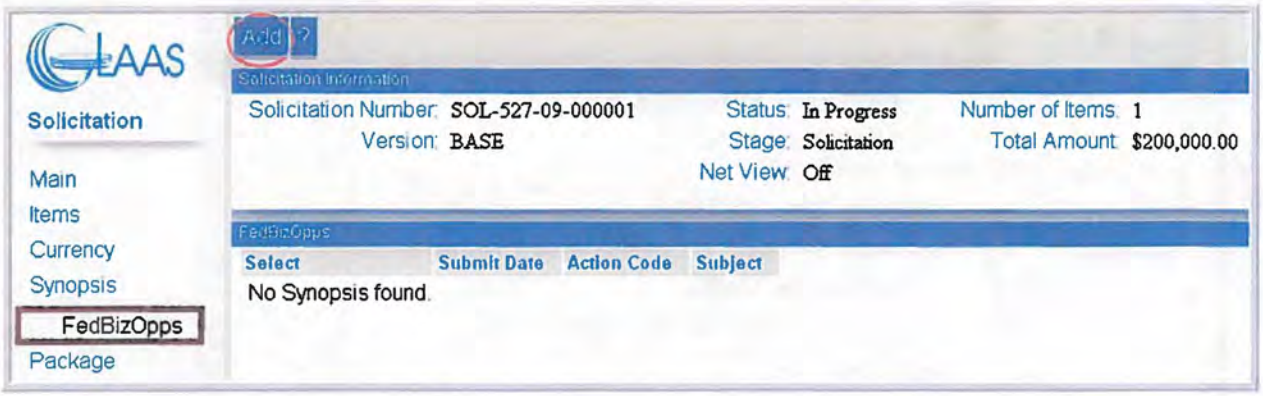


Figure 24: Synopsis / FedBizOpps Screen

Steps	Section	User Action	Guidance
38.	Synopsis / FedBizOpps	Click the **Add** toolbar button.	A Synopsis is required in order to post the Solicitation to the FedBizOpps website. If you entered a **Reason not Synopsized** on the **Main / General** screen, you do not need to synopsize the Solicitation.

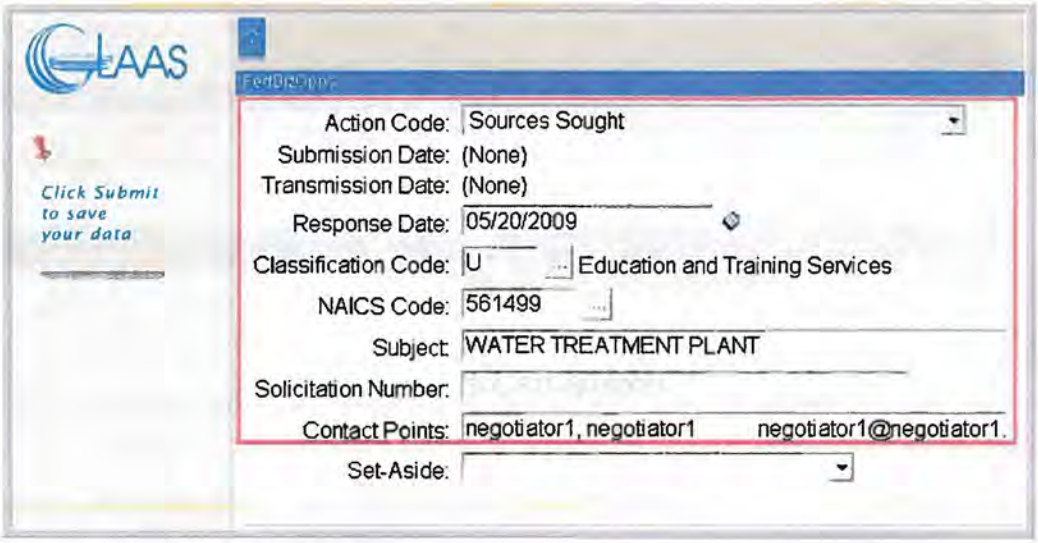


Figure 25: FedBizOpps Screen

Steps	Section	User Action		Guidance
39.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:		GLAAS displays the information needed to post a Synopsis of this Solicitation on FedBizOpps. Most of the information in the Synopsis is pulled from the Solicitation itself. You can change these fields if necessary. You must have a FedBizOpps user ID and password in order to post a Synopsis to FedBizOpps directly from GLAAS.
		Action Code: Select the type of action for this Synopsis.	R	
		Submission/Transmission Date: These dates will auto-populate when the Synopsis is submitted for transmission.	R	
		Response Date: This date will auto-populate if the **Responses Due Date** was entered on the **Main / General** screen.	R	
		Classification Code: Select the appropriate alphanumeric code to categorize the goods or services ordered.	R	
		NAICS Code: This code will auto-populate if entered on the **Main / General** screen.	R	
		Subject: This field will auto-populate from the **Header Text** field on the **Main / Text** screen. Verify the text is appropriate for external audiences.	R	
		Contact Points: This field will auto-populate the Buyer's name from the **Main / General** screen.	R	
		Set-Aside: Select an appropriate value from the dropdown list if applicable.	O	

FedBizOpps

Contracting Office Address

Name: USAID Peru

Address Region: Current Region - US

Address1 00001

Address2

Address3

Address4

City

State

Zip

Country

Web Link

URL: www.usaid.gov/index.html

Description: Office of the Assistant Adminstrator

Email

Address: negotiator1@usaid.gov

Description: negotiator1, negotiator1

Figure 26: FedBizOpps Screen

Steps	Section	User Action	Guidance
44. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:	

Contracting Office Address: This field will auto-populate the address that was selected as the **Issuing Office** on the **Main / General** screen.	R
Web Link: Enter the **URL** and **Description** of the web link that gives additional information about this Solicitation. Both of these fields must be entered or they may both be left blank.	R/O
Email: This field will auto-populate the email address for the Contracting Officer if it was entered in the system.	O

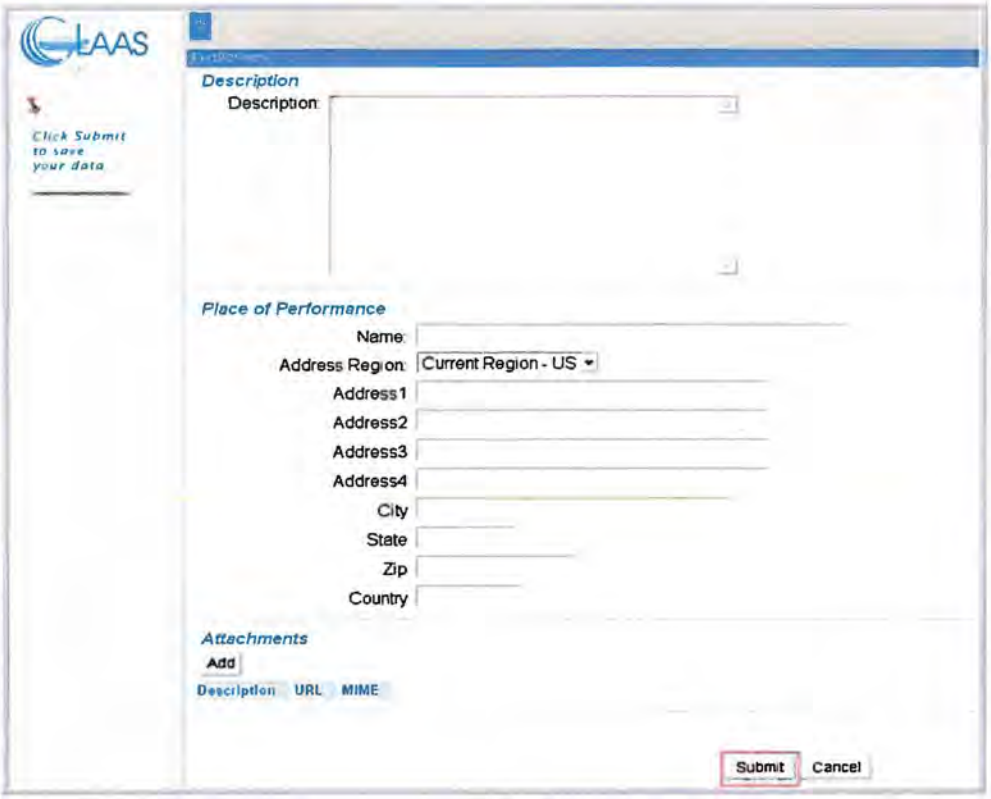


Figure 27: FedBizOpps Screen

Steps	Section	User Action	Guidance
44. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter additional information about the Solicitation. — O **Place of Performance:** Enter the address in which the service is performed or supplies delivered. — O	USAID is not currently using the **Attachments** field.
40.	FedBizOpps	When the Synopsis is complete and approved by the CO, click the **Submit** button to submit the information to FedBizOpps. GLAAS will prompt you to enter a FedBizOpps user ID and password (not shown). After entering a user ID and password, click the **Transmit** button to send the Synopsis to FedBizOpps (not shown).	The CO must review the Synopsis prior to posting on FedBizOpps. Your FedBizOpps user ID and password will be different from your GLAAS user ID and password. After submitting the Synopsis, GLAAS will display a **Submit Date** (not shown).
41.	Synopsis	Click the **Package** link on the left-hand menu (not shown).	

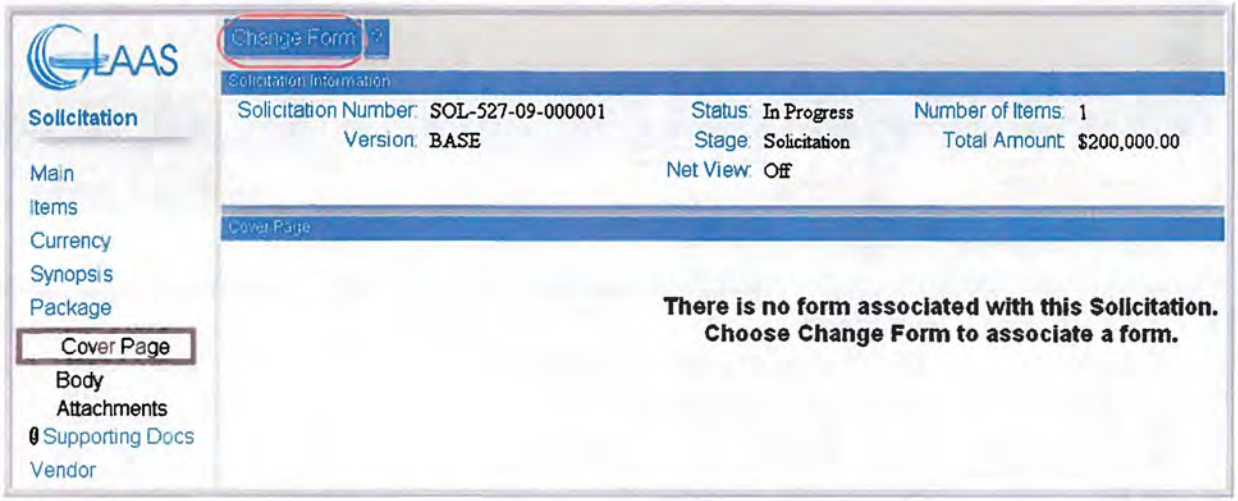


Figure 28: Package / Cover Page Screen

Steps	Section	User Action	Guidance
42.	Package / Cover Page	Click the **Change Form** toolbar button.	

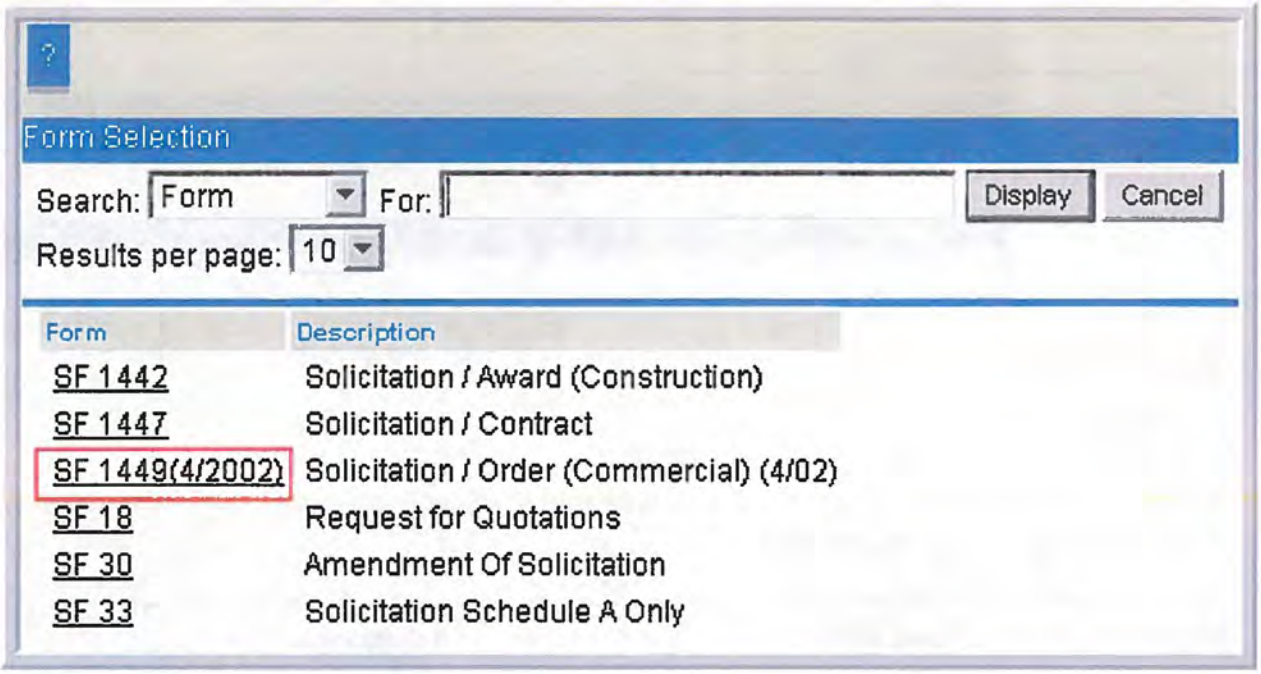


Figure 29: Form Selection Screen

Steps	Section	User Action	Guidance
43.	Form Selection	Click the **Form** link to select a Cover Page.	

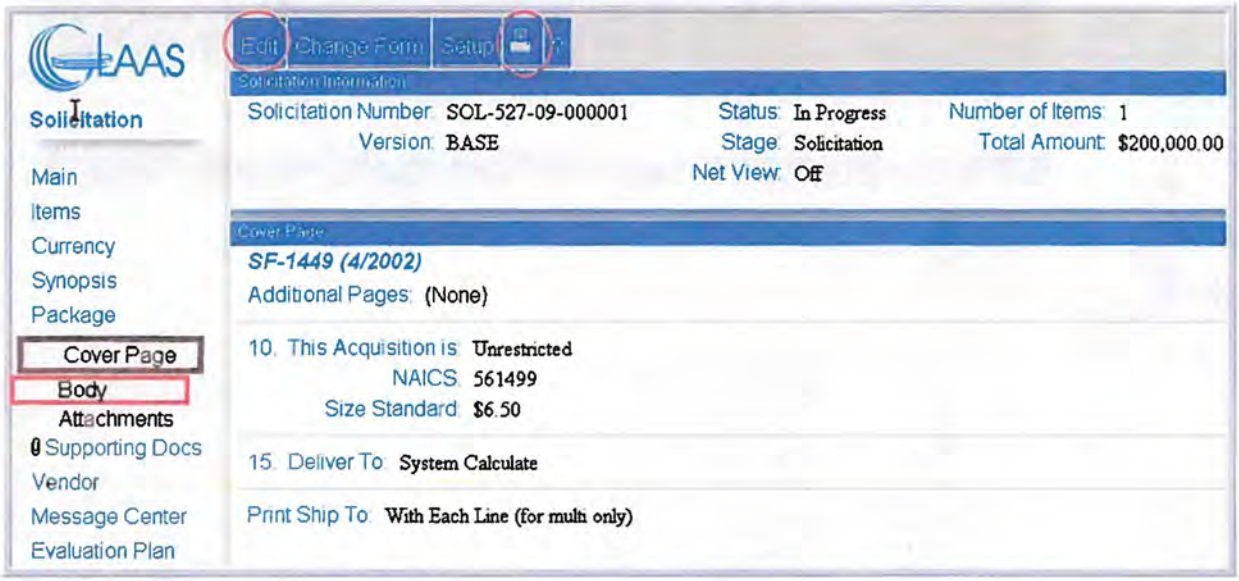


Figure 30: Package / Cover Page Screen

Steps	Section	User Action	Guidance
44.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the Solicitation Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
45.	Package / Cover Page	Click the **Body** link on the left-hand menu to review the clauses in the Solicitation.	

Figure 31: Package / Body Screen

Steps	Section	User Action	Guidance
46.	Package / Body	GLAAS shows the clause sections that will be included in the Solicitation from the Clause Template. You can add, change, or remove clauses if necessary. Click on the **Section Title** of a section to drill down into the clauses for each section (not shown).	The *Working with Clauses* user guide shows you how to add, change, and remove clauses from a GLAAS Solicitation or Award. You must add FAR clauses first, and then add AIDAR clauses. AIDAR templates always display "AIDAR" in the template name. You can add another Clause Template by clicking the **Load Template** toolbar button (not shown).
47.	Package / Body	Click the **Generate** toolbar button when the clauses are complete.	GLAAS generates a modifiable Rich Text Format (.rtf) document that includes all of the clauses for your Solicitation (not shown).

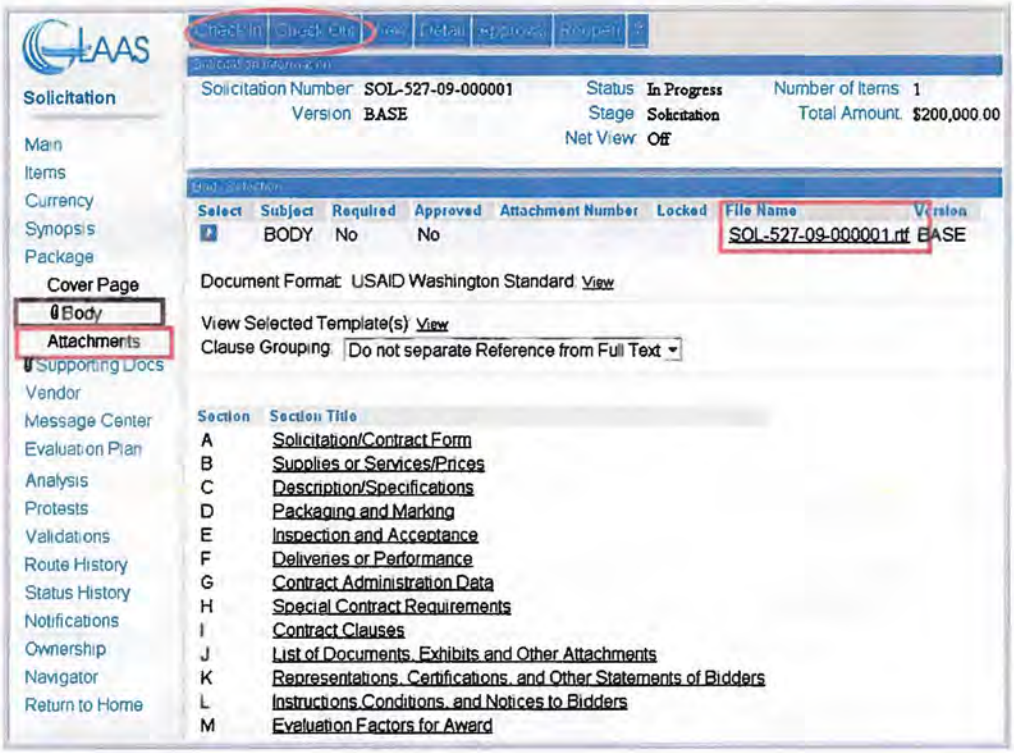


Figure 32: Package / Body Screen

Steps	Section	User Action	Guidance
48.	Package / Body	Modify the Solicitation document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Checking documents in and out of GLAAS prevents multiple people from editing the same document at the same time. When checking a document back in, the file name must be the same as when it was checked out. You can click the ".rtf" link under **File Name** to view the Solicitation document, but any changes you make will not be saved in GLAAS. You must **Check Out** and **Check In** to make edits to the document. The *Working with Clauses* user guide shows you how to **Check Out** and **Check In** documents.
49.	Package / Body	Click the **Attachments** link on the left-hand menu.	

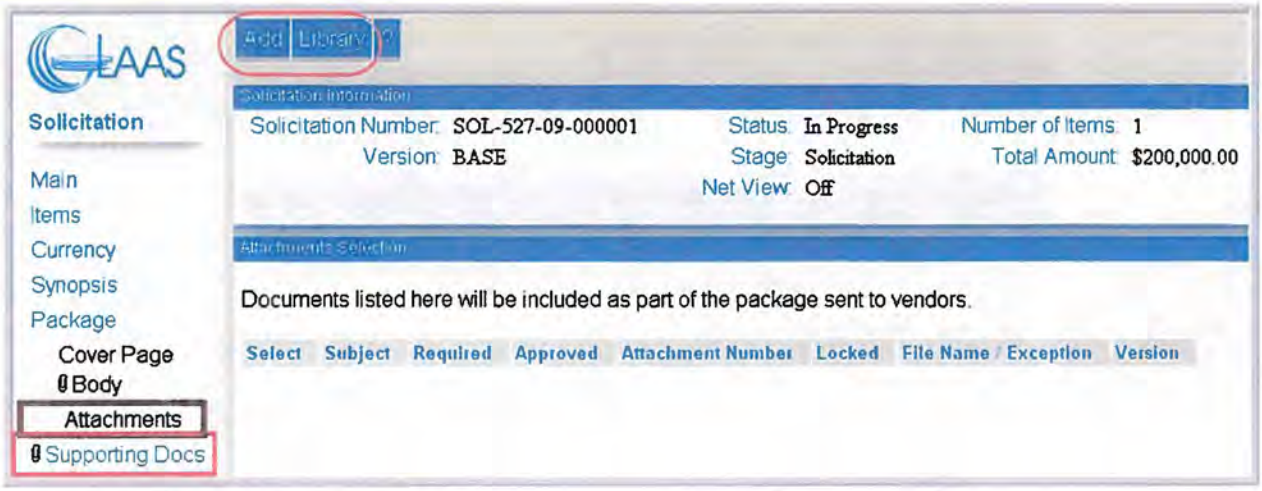


Figure 33: Package / Attachments Screen

Steps	Section	User Action	Guidance
50.			
51.	Package / Attachments	Click the **Add** or **Library** toolbar button to add an attachment to the Solicitation package (not shown). Modify an existing attachment by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any attachments from the Requisition will be pulled into the Solicitation. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Once a document is added here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
52.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	

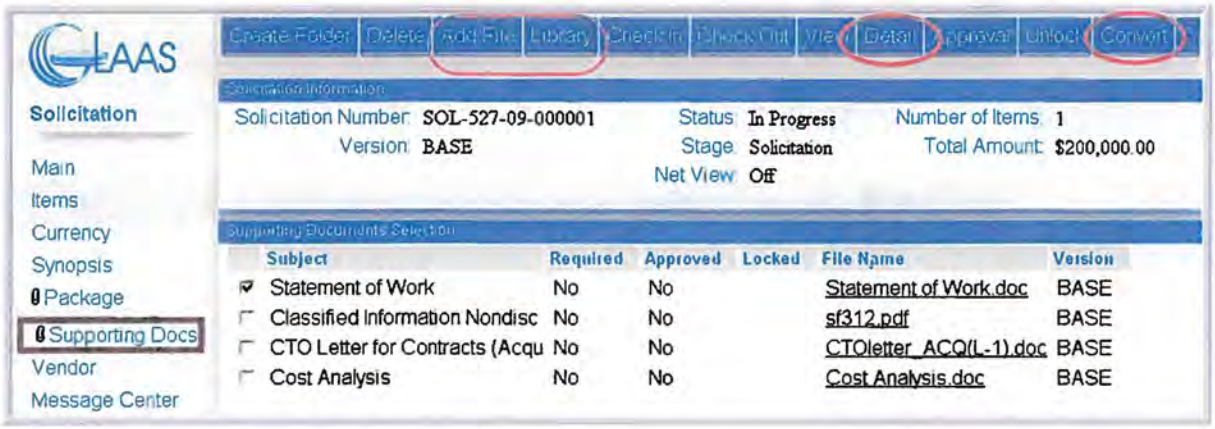


Figure 34: Package / Supporting Docs Screen

Steps	Section	User Action	Guidance
53.	Package / Supporting Docs	Click the **Add File** or **Library** toolbar button to add a supporting document to the Solicitation package. Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any supporting documents from the Requisition will be pulled into the Solicitation. The **Supporting Docs** screen contains documents for internal use that will not be sent to the vendor. Example: "Cost Analysis." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. To allow only users with "Full Access" to view supporting documents, click the **Detail** toolbar button and then check the **Confidential** box (not shown). Once a document is added here, you can use the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments**.

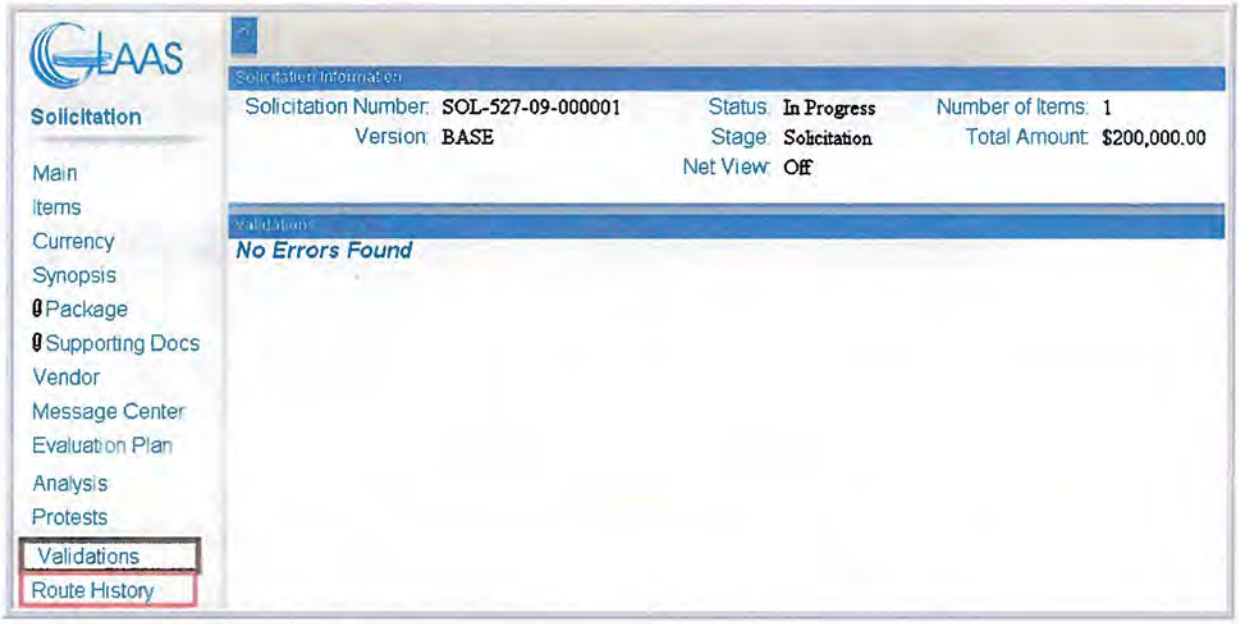


Figure 35: Validations Screen

Steps	Section	User Action	Guidance
54.	Package / Supporting Docs	Click the **Validations** link on the left-hand menu (not shown).	Refer to the *Creating a Vendor List and Vendor Responses* user guide for more information on how to use the **Vendor** link. USAID is not currently using the following links: • **Evaluation Plan** • **Analysis** Evaluations of Solicitations will continue to be handled outside of GLAAS and the results will be uploaded to GLAAS as a supporting document.
55.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Solicitation (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
56.	Validations	Click the **Route History** link on the left-hand menu.	

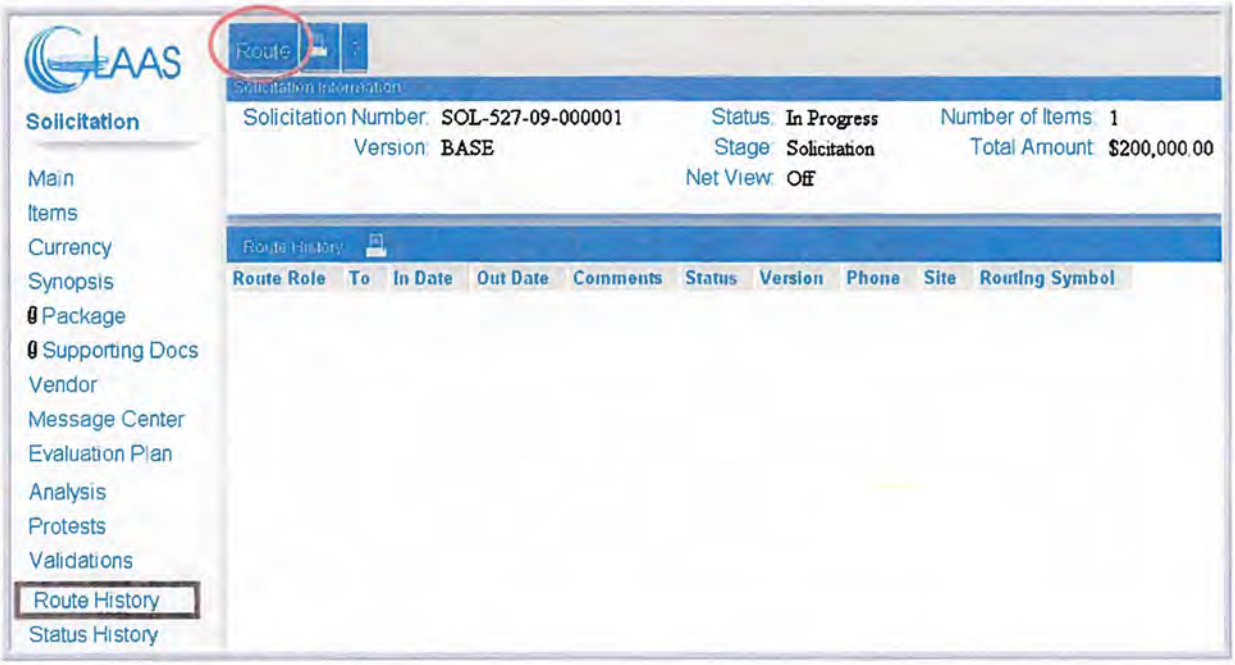


Figure 36: Route History Screen

Steps	Section	User Action	Guidance
57.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
58.	Route History	The Solicitation has been routed for review and approval.	Once the Solicitation is approved and released in GLAAS by the CO, the A&A Specialist needs to log into FedBizOpps and post it.
59.	Route History	Click the **Return To Home** link on the left-hand menu (not shown).	

GLAAS 102 USER GUIDE:

AMENDING A SOLICITATION

PURPOSE:

This user guide will show you how to amend a Solicitation and will define all required fields.

BEFORE STARTING:

1. In order to amend a Solicitation, you must be a Contracting Officer.
2. You should have a Solicitation with the status of "Released."

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Open** link on the **Access Panel** to search for a Solicitation, and then go to **Step 3**. OR Click a Document link under **Recent Documents**, and then go to **Step 4**.	

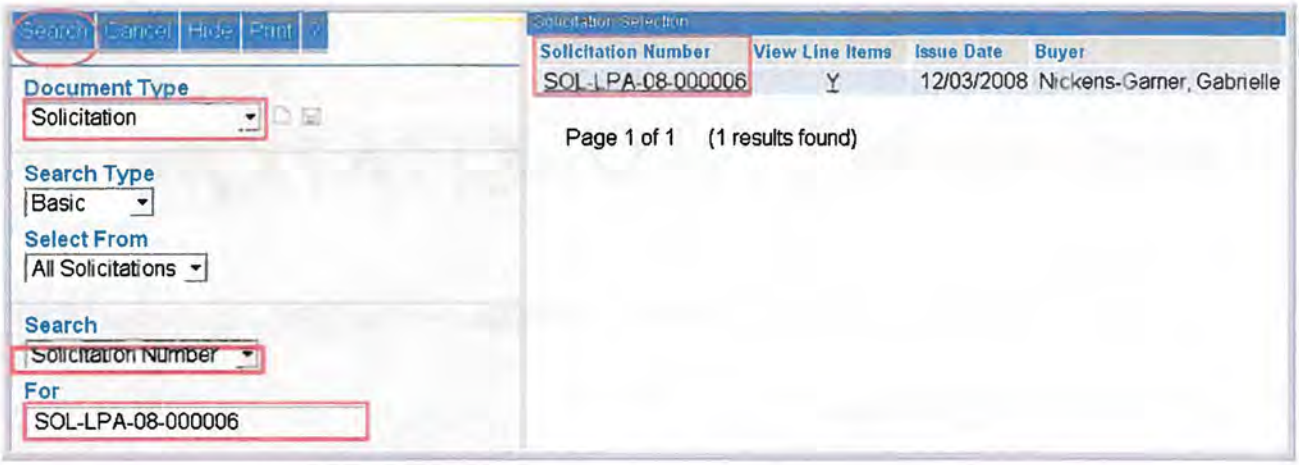


Figure 2: Document Selection Screen

Steps	Section	User Action	Guidance
3.	Document Selection	Complete the following fields: • **Document Type:** Select "Solicitation." • **Select From:** Select "All Solicitations." • **Search:** Defaults to "Solicitation Number." • **For:** Enter the Solicitation number.	**Select From** will default to "My Solicitations." Change this to "All Solicitations" when searching for solicitations created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user (not shown).
4.	Document Selection	Click the **Search** toolbar button.	
5.	Document Selection	Click the **Solicitation Number** link.	

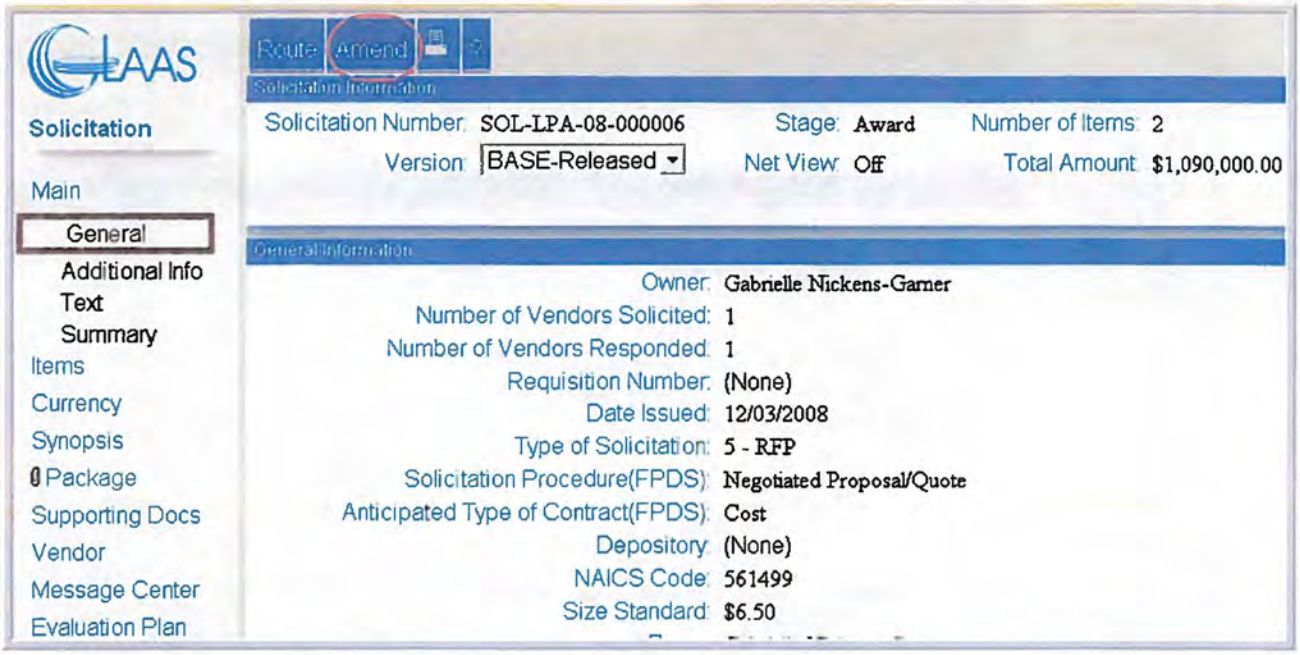


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Select the **Amend** toolbar button.	The Solicitation must be in a "Released" status in order for the **Amend** button to appear.

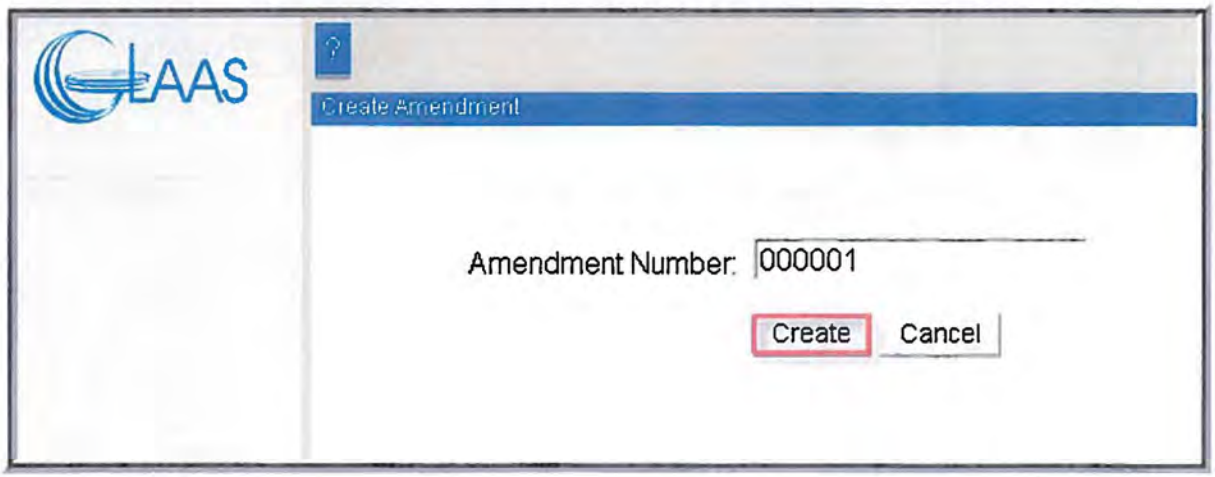


Figure 4: Create Amendment Screen

Steps	Section	User Action	Guidance
7.	Create Amendment	Click the **Create** button.	The **Amendment Number** is automatically generated. Do not modify.

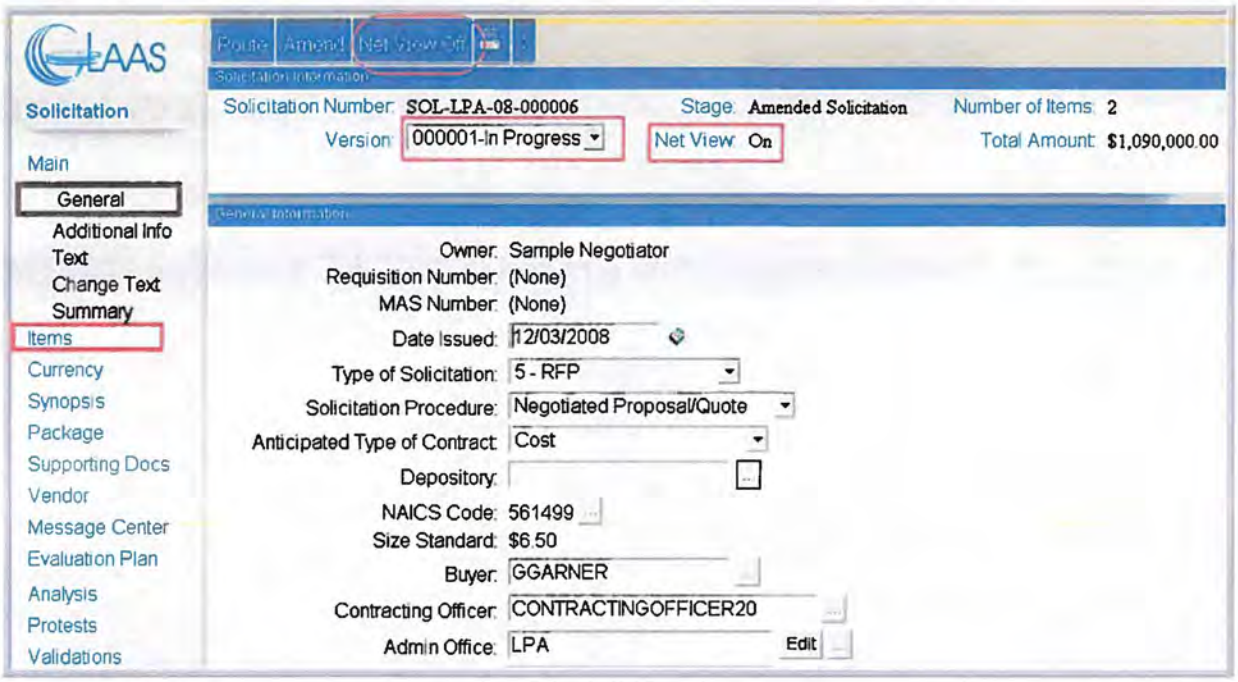


Figure 5: Main / General Screen

Steps	Section	User Action	Guidance
8.	Main / General	All **Main** level fields are now editable and can be updated.	The **Version** dropdown list on the top of the **Main / General** screen allows you to toggle between the "Released" and amended "In Progress" versions of the document. Use the left-hand menu to navigate through the document.
9.	Main / General	Click the **Items** link on the left-hand menu.	

Figure 6: Items Screen

Steps	Section	User Action	Guidance
10.	Items	Click the **Item** number link to update an existing item on an Amended Solicitation, or to add a new item, simply select the **Add** toolbar button.	Refer to the *Creating a Solicitation* user guide for additional detailed steps.

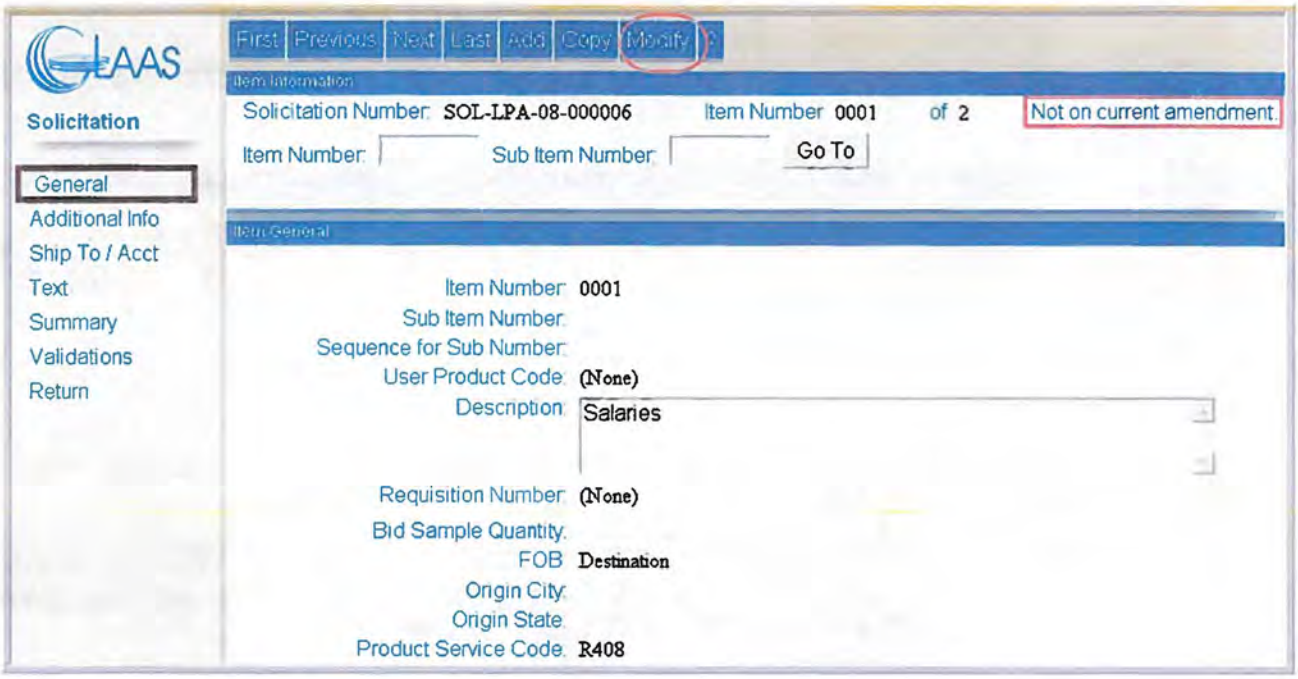


Figure 7: Items / General Screen

Steps	Section	User Action	Guidance
11.	Items / General	Click the **Modify** toolbar button to amend the line item.	When you first open an existing line item, you are viewing a Read-Only version of the line item. The **Not on current amendment** statement indicates that the existing line item is not yet in the Amended Solicitation.

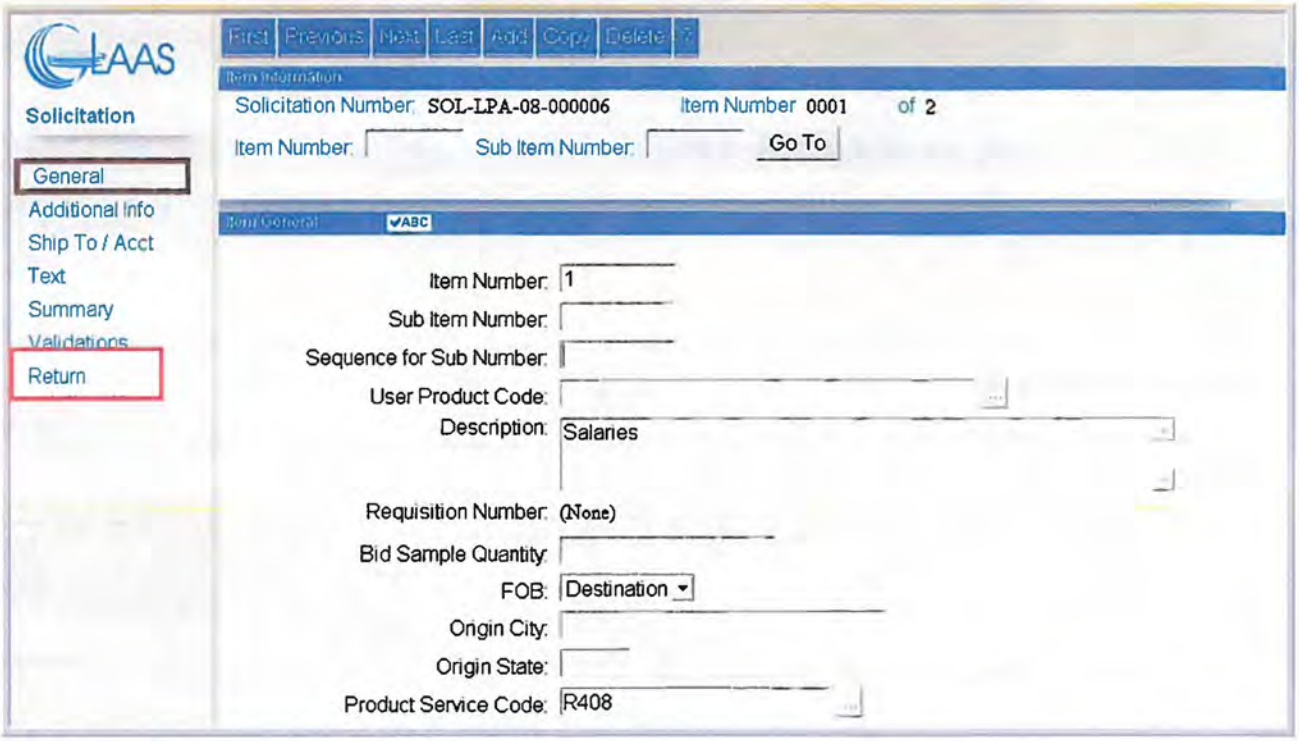


Figure 8: Items / General Screen

Steps	Section	User Action	Guidance
12.	Items / General	Update the fields that need to be changed.	All fields are now editable and can be updated on this item. If you are going to increase or decrease the amount, make sure to enter the new total amount on the **Items / General**, **Items / Ship To** and **Items / Accounting** screens (not shown).
13.	Items / General	Click the **Return** link on the left-hand menu.	

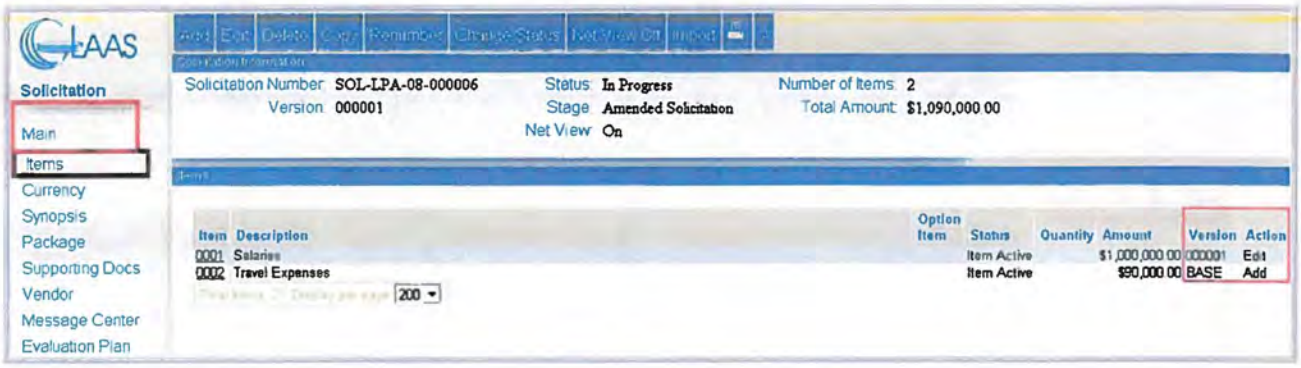


Figure 9: Items Screen

Steps	Section	User Action	Guidance
14.	Items	Click the **Main** link on the left-hand menu.	Having returned to the **Items** screen, you can review which items were edited and on which version of the document.

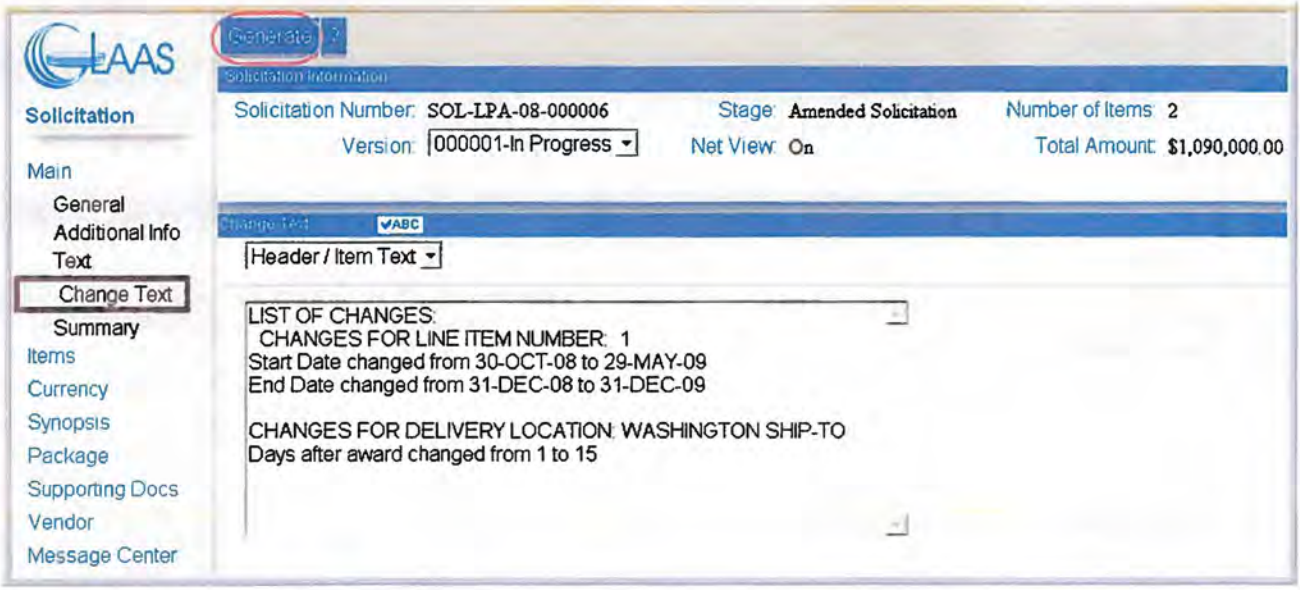


Figure 10: Main / Change Text Screen

Steps	Section	User Action	Guidance
15.	Main / General	Click the **Change Text** link on the left-hand menu to display the **Main / Change Text** screen.	**Change Text** is only available on Amended Solicitations.
16.	Main / Change Text	Click the **Generate** toolbar button. If you have changed the clauses in the **Package/Body**, select the **Header / Item Text** dropdown list and select "Clause Text."	GLAAS tracks all the changes made in the amended version. The text that is generated can be edited. It will print on the schedule of the Solicitation.
17.	Main / Change Text	Click the **Validations** link on the left-hand menu to validate this Solicitation (not shown).	

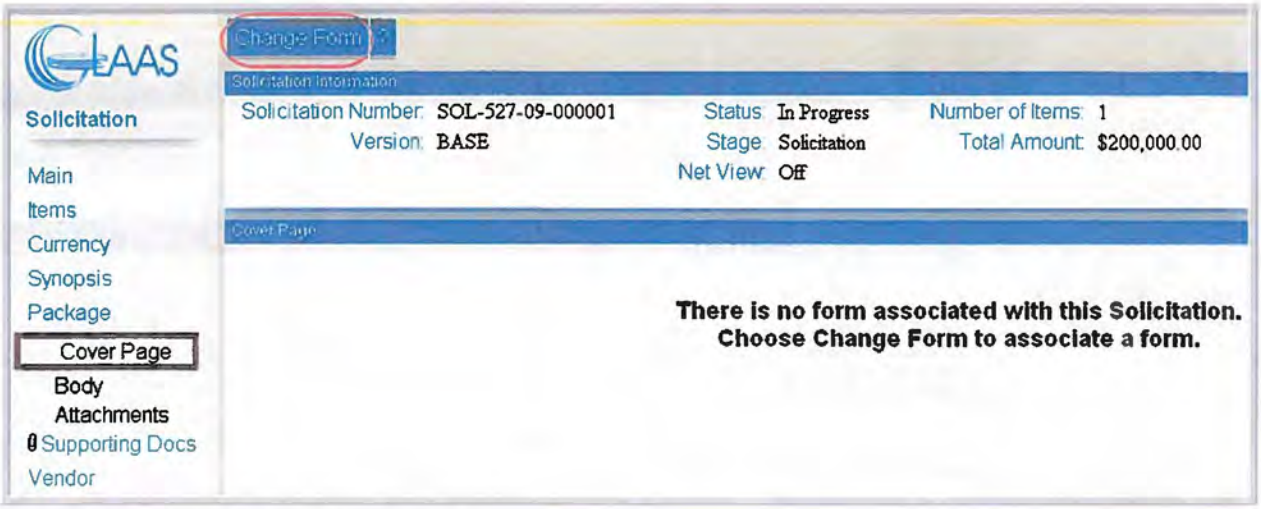


Figure 11: Package / Cover Page Screen

Steps	Section	User Action	Guidance
18.	Package / Cover Page	Click the **Change Form** toolbar button.	

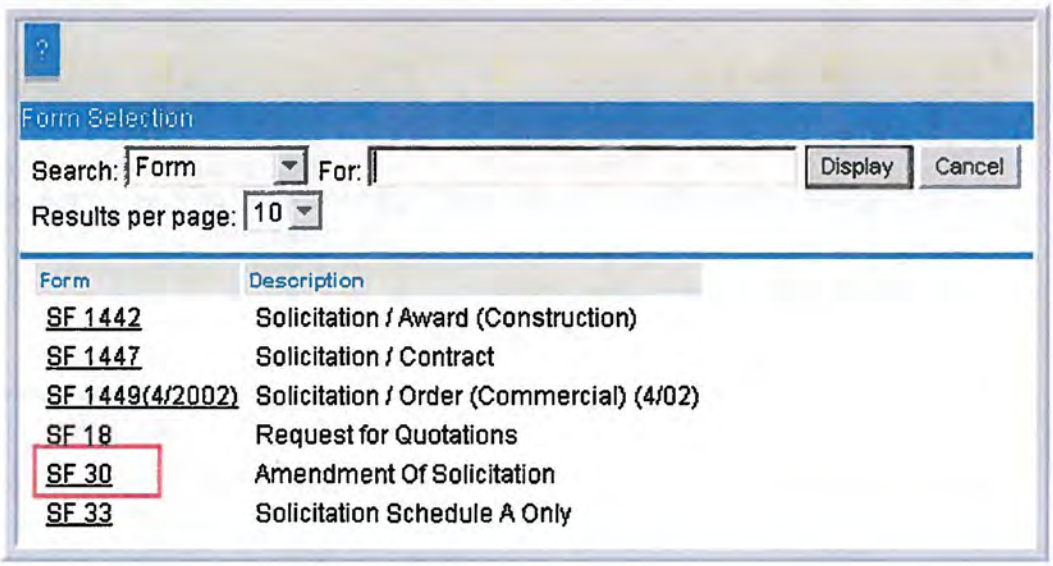


Figure 12: Form Selection Screen

Steps	Section	User Action	Guidance
19.	Package / Cover Page	Click the **Form** link to select a Cover Page.	

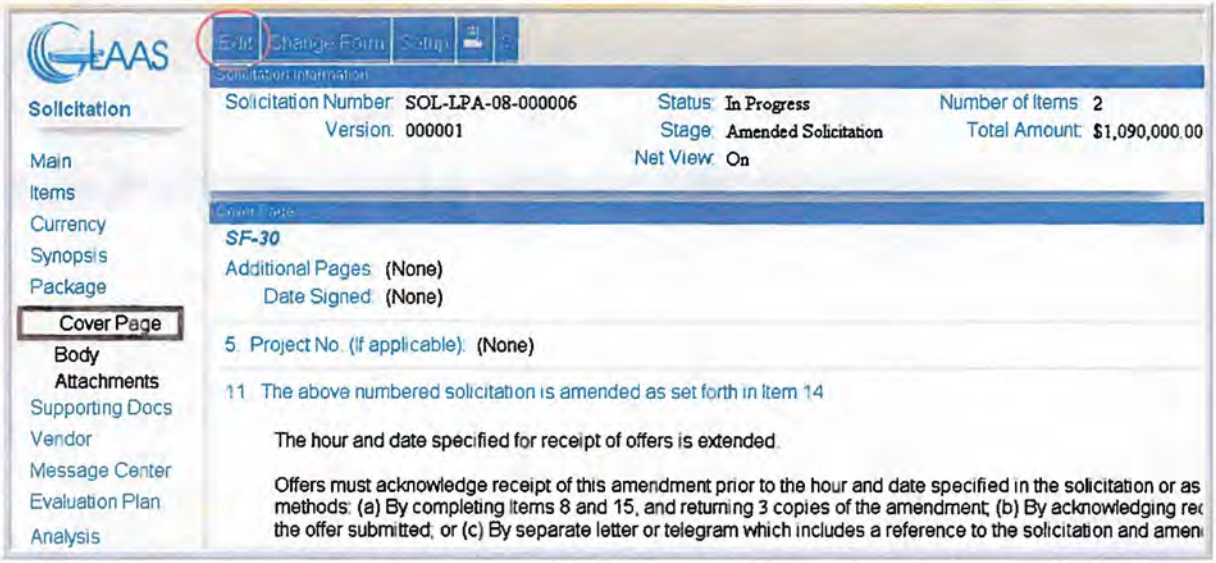


Figure 13: Package / Cover Page Screen

Steps	Section	User Action	Guidance
20.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the amended Solicitation Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS. If you selected the "SF-30" for this amended Solicitation and changed the **Response Due Date** on the **Main / General** screen, you will have to **Edit** this form to reflect that change in Block 11.
21.	Package / Cover Page	Click the **Validations** link on the left-hand menu (not shown).	

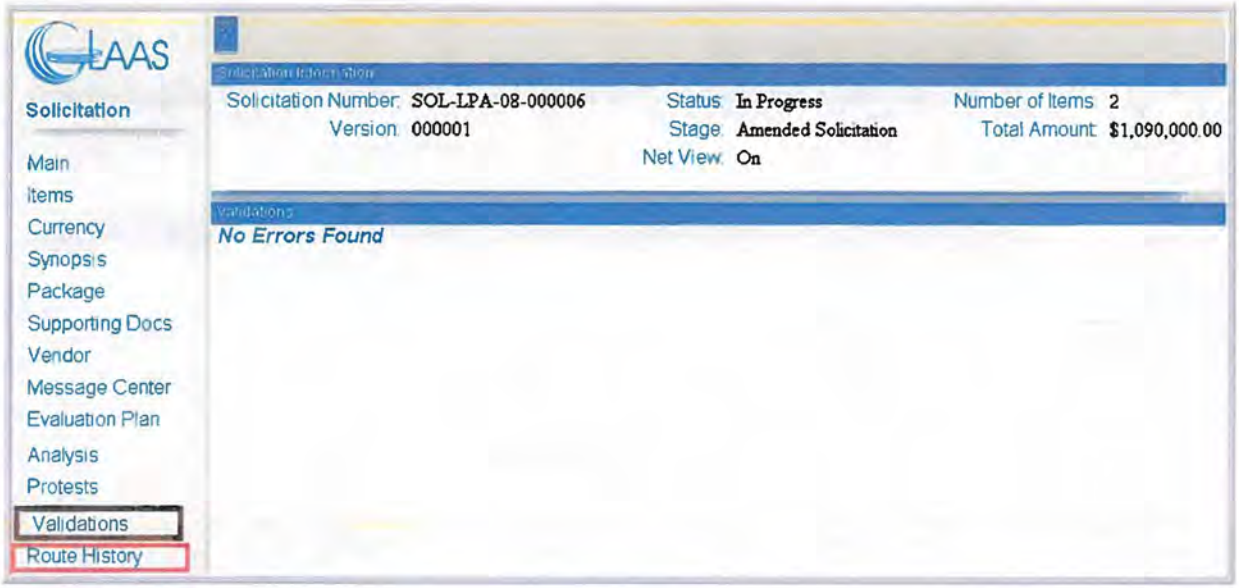


Figure 14: Validations Screen

Steps	Section	User Action	Guidance
22.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Solicitation (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it. If you did not fill in the Phoenix funding information in the **Accounting Information** sections you will receive error messages about these missing values. If there are no GLAAS error messages, the system will prompt you to validate in Phoenix. If you are not approving the document and committing funds, click the **No** button (not shown).
23.	Validations	Click the **Route History** link on the left-hand menu.	

Figure 15: Route History Screen

Steps	Section	User Action	Guidance
24.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
25.	Route History	Click the **Return to Home** link on the left-hand menu (not shown).	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Creating a Solicitation

November 2009

Creating a Solicitation Objectives

- At the end of this topic, you will know how to:
  - Create a Solicitation from a Requisition
  - Add contract clauses and solicitation package documentation
  - Post the Solicitation to FedBizOpps
  - Route the Solicitation
  - Amend a released Solicitation

Creating a Solicitation Process

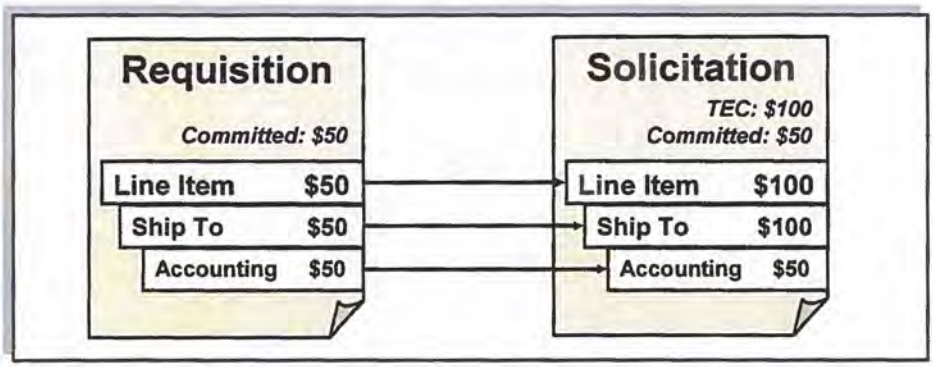
- A Solicitation is created from a Requisition
- The A&A Specialist routes the document to the Contracting Officer for review
- The Contracting Officer will be able to open the Solicitation to edit, approve, and release in GLAAS
- The A&A Specialist will post the released Solicitation to FedBizOpps

Creating Solicitations Roles & Responsibilities

- The A&A Specialist –
  - Creates a Solicitation
  - Sends the synopsis to FedBizOpps
  - Generates contract documentation
  - Enters vendor bids
  - Posts the Solicitation on FedBizOpps after CO approval
- The Contracting Officer –
  - Approves and releases the Solicitation in GLAAS
- The Technical Panel –
  - Evaluates the bids

Total Estimated Cost vs. Commitment Amount

- You will have to upward adjust the line item and Ship To amounts based on the CLIN Estimated Amount



Approving Solicitations

- All Solicitations require a Contracting Officer to be the last reviewer on the route list
- For Solicitations more than $100,000, but less than $10 million, an OSDBU Advisor and a CO are required to approve the document (AID/W only)
- For Solicitations more than $10 million, the Contract Review Board, the OSDBU Advisor and CO are all required to approve the document
- Missions may establish additional policies for routing and approving Solicitations
- Solicitations must be released in GLAAS and posted separately to FedBizOpps

GLAAS 102 USER GUIDE:

CREATING A SOLICITATION FROM A REQUISITION

PURPOSE:

This user guide will show you the steps you must complete in order to create a Solicitation from a Requisition.

BEFORE STARTING:

1. In order to create a Solicitation from a Requisition, you must be an A&A Specialist or Contracting Officer.
2. A Requisition must have been created, approved and released.
3. You should have created a Milestone Plan and associated it to the Requisition for this action.

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel.**	

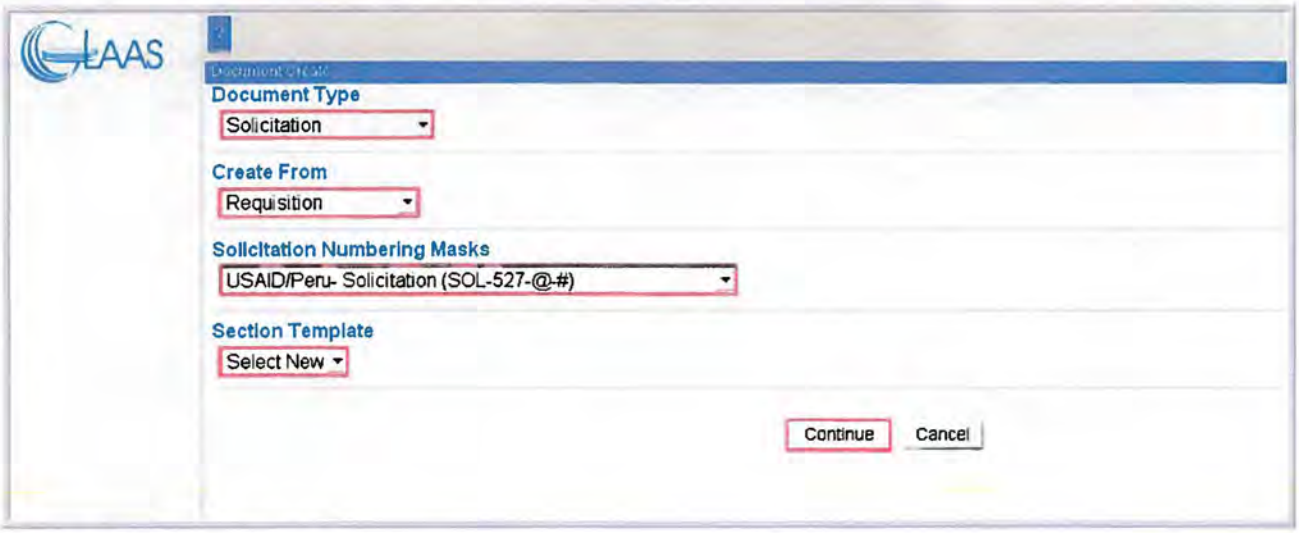


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Solicitation." • **Create From:** Select "Requisition." • **Solicitation Numbering Masks:** Select a Numbering Mask. • **Section Template:** Choose "Select New" to load a clause template now or select "None" to add a template later.	You will create a Solicitation from a Requisition. Choosing "Select New" in the **Section Template** field tells GLAAS to show you a list of Clause Templates. You pick and choose Clause Templates to create the Body of the Solicitation. You will not be prompted here to pick a Clause Template if you choose "None." Clause templates can be selected at any time in the Package Body.
4.	Document Create	Click the **Continue** button.	

Figure 3: Create Solicitations from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Solicitations from Requisition	Search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor. Clear the **Site** field when searching for a document or a user.

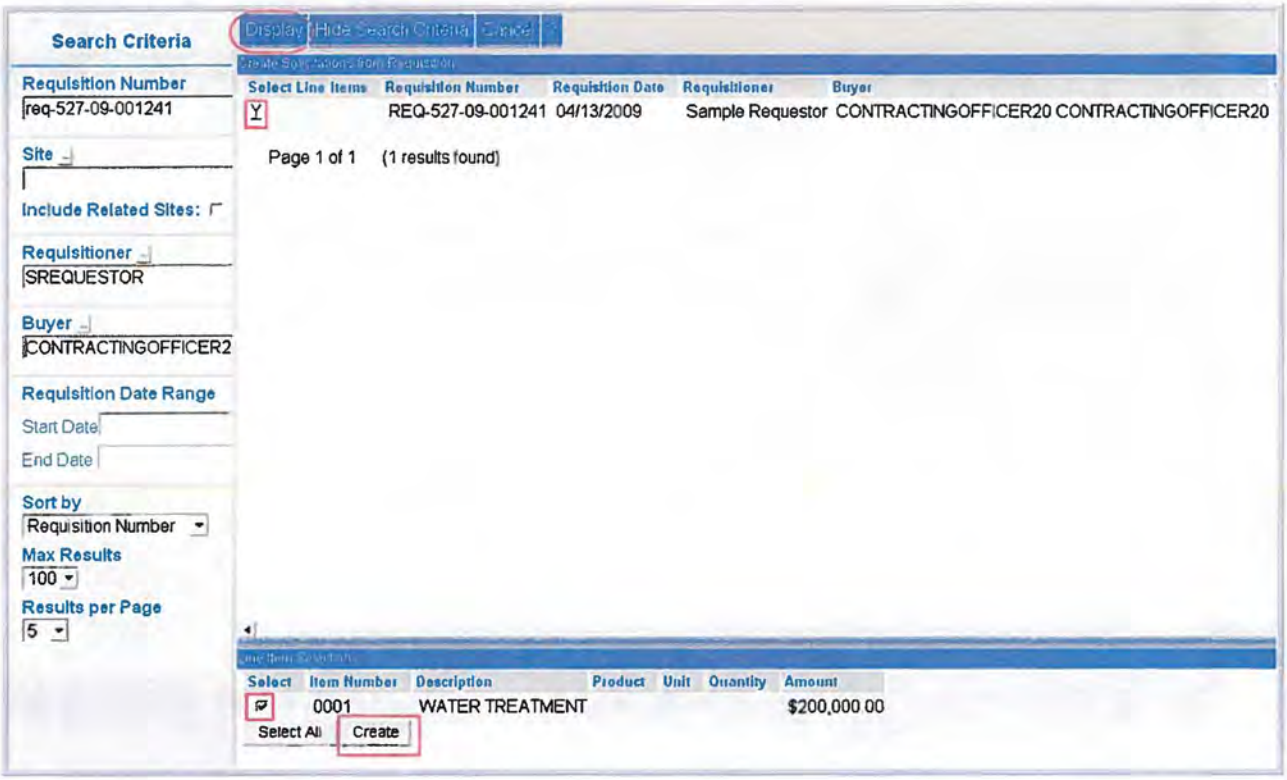


Figure 4: Create Solicitations from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Solicitations from Requisition	Click the **Y** in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
7.	Create Solicitations from Requisition	Check the box in the **Select** column for each line item you want to pull into the Contract from the Requisition. Click the **Create** button.	

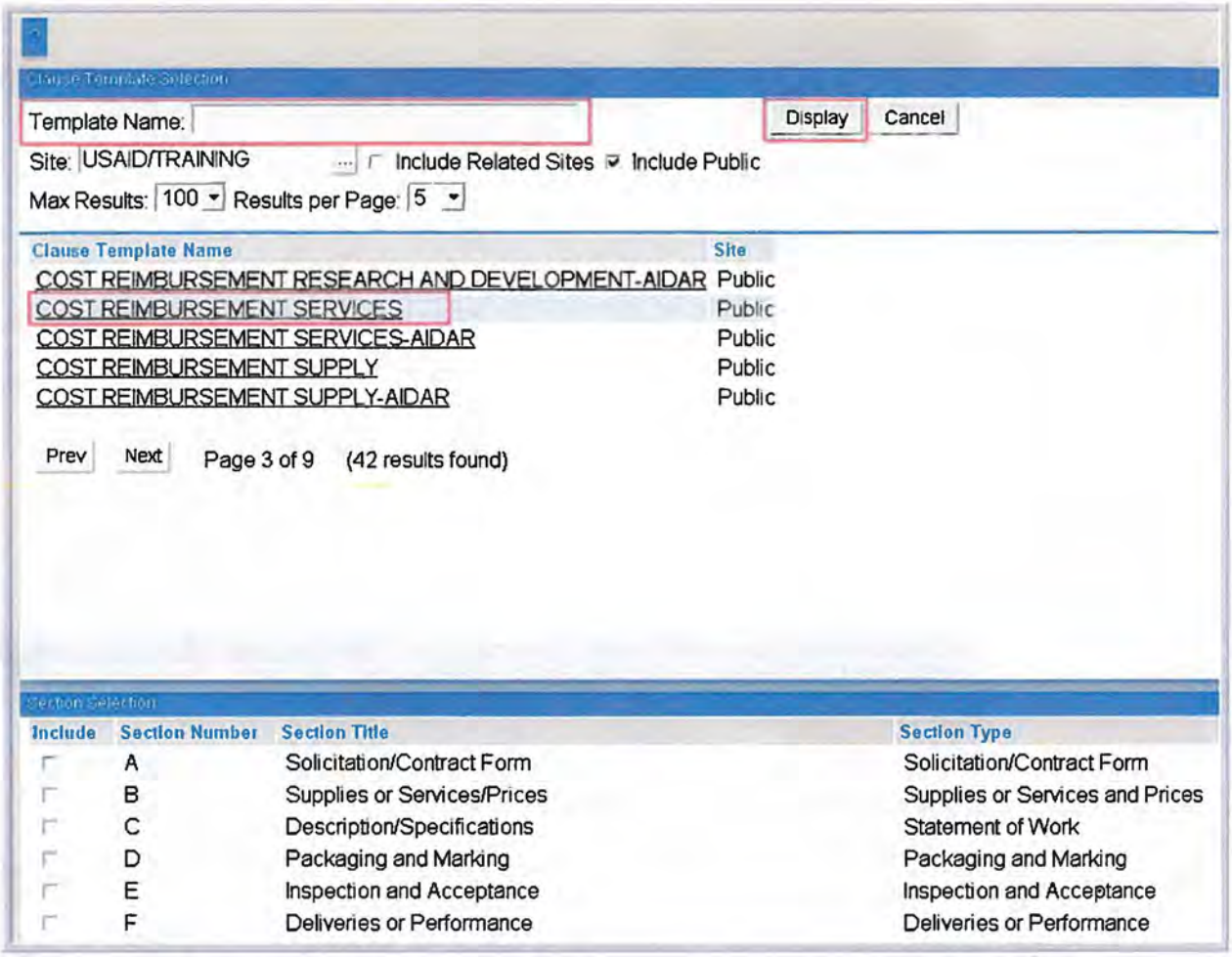


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Search for a Clause Template by **Template Name.** Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause Templates include the basic FAR and AIDAR clauses you need for a Contract. You must add the FAR clauses first; you will add the AIDAR clauses later.

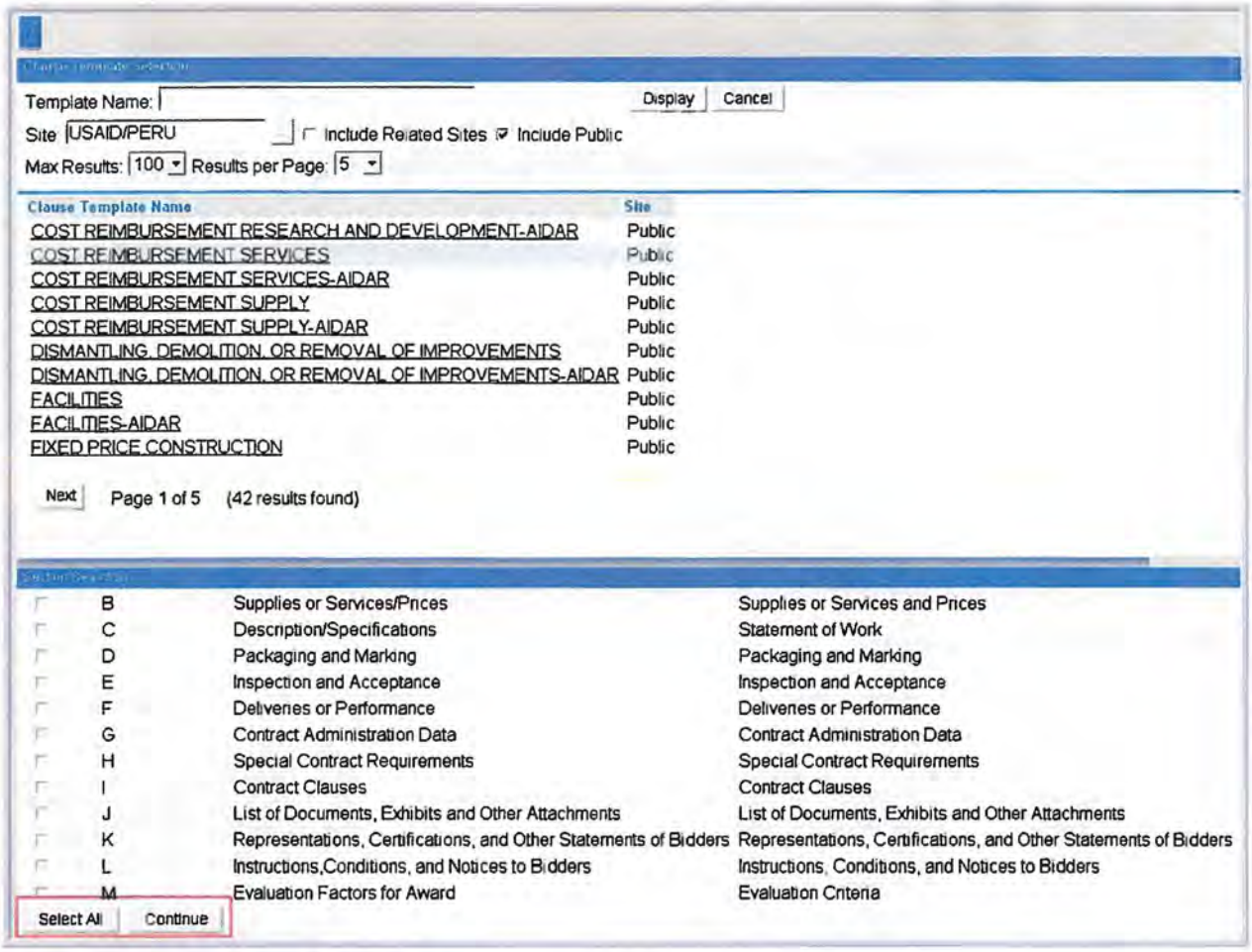


Figure 6: Clause Template Selection Screen

Steps	Section	User Action	Guidance
9.	Clause Template Selection	Click the **Select All** button to include all of the clause sections in your Solicitation. OR Check or uncheck the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS Solicitation or Award. .
10.	Clause Template Selection	Click the **Continue** button to pull the clauses into your Solicitation.	

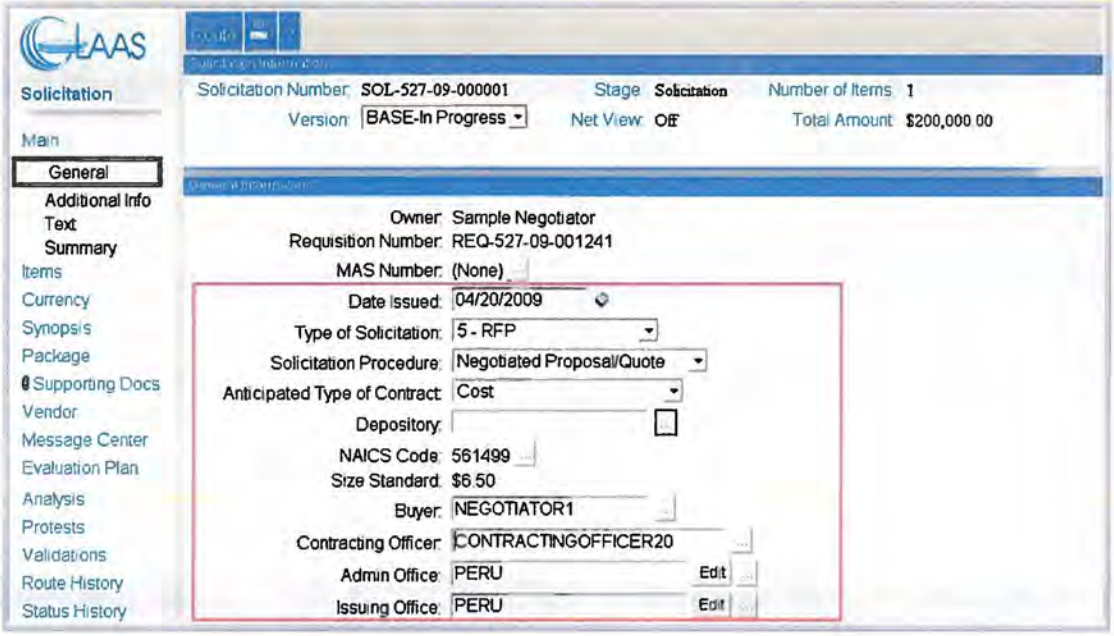


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Date Issued:** Enter the date the Solicitation will be issued. — R **Type of Solicitation:** Select the type of Solicitation being created. — R **Solicitation Procedure:** Select the submission procedure for the Solicitation. — R **Anticipated Type of Contract:** Select the type of contract to be awarded. — R **NAICS Code:** Click the lookup button (...) to select the appropriate code. — R **Buyer:** Select the User ID of the appropriate A&A Specialist. — R **Contracting Officer:** Select the User ID of the Contracting Officer. — R **Admin Office:** Select the code for the COTR's office. — R **Issuing Office:** Select the code for the contracting office. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. USAID is not currently using the **Depository** field.

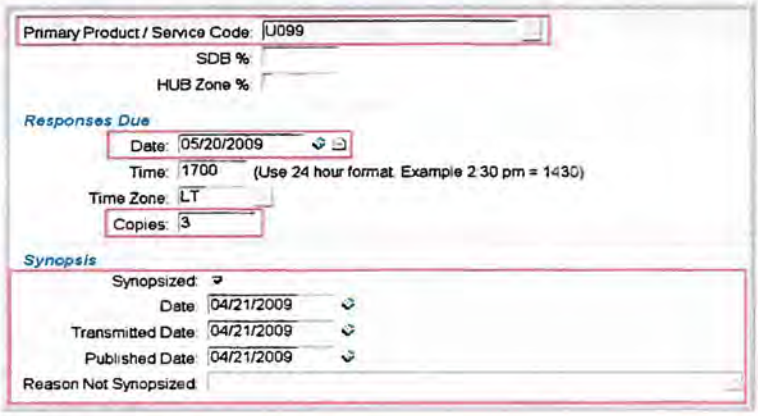


Figure 8: Main / General Screen

Steps	Section	User Action	Guidance
12.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Primary Product/Service Code:** Select an appropriate code from the list. — R **SDB %:** Type a whole number 1-100 representing a preference calculation for SDB. — O **HUB Zone %:** Type a whole number 1-100 representing a preference calculation for HUB Zone. — O **Date:** Enter the date the vendors must submit their Bids/Responses. — R **Copies:** Enter the number of Bid/Response copies to be received. — R **Synopsized:** Check this box if you plan to synopsize. — R/O **Date:** Enter the date on which the contract action was synopsized. — R/O **Transmitted Date:** Enter the date the action was sent to FBO to be published. — R/O **Published Date:** Enter the date the action was published by FBO. — R/O **Reason Not Synopsized:** Enter a reason if you do not synopsize the Solicitation. — R/O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If this Solicitation does not need to be synopsized on FedBizOpps (FBO): • Leave the **Synopsized** checkbox unchecked. • **Reason Not Synopsized** is required if you do not synopsize the Solicitation.
13.	Main / General	Click **Additional Info** link on the left-hand menu (not shown).	

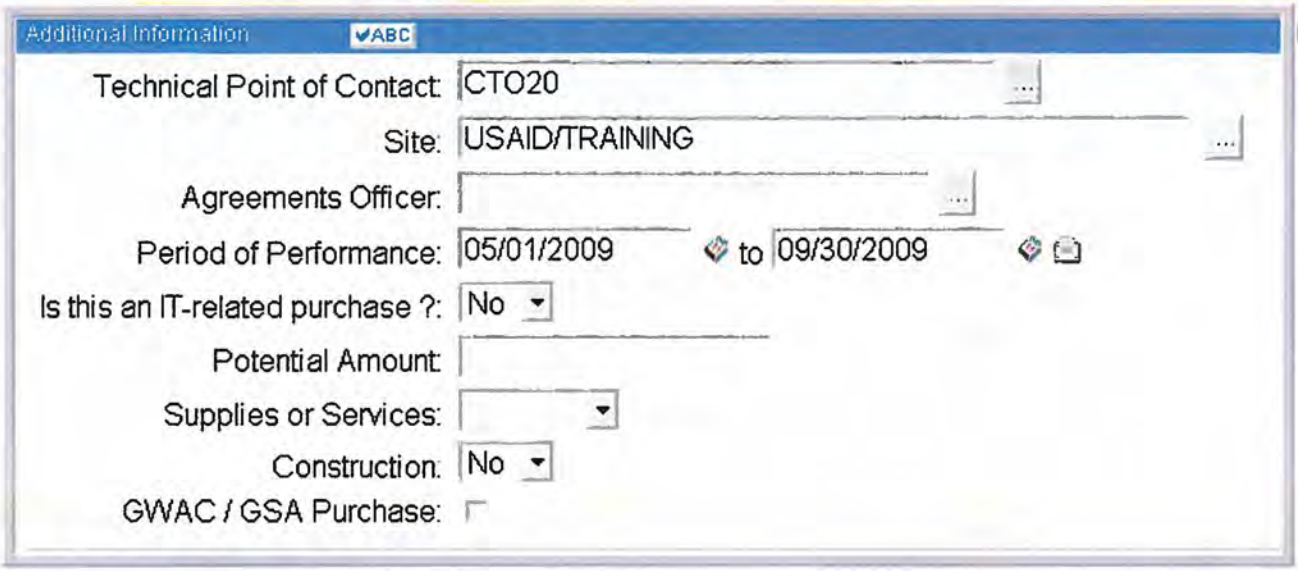


Figure 9: Main / Additional Info Screen

Steps	Section	User Action		Guidance
14.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		USAID is not currently using these fields: • **Potential Amount** • **Supplies or Services:** Leave field blank. • **Construction** **GWAC/GSA Services:** Leave field unchecked.
		Technical Point of Contact: Add or change the point of contact if necessary.	O	
		Agreements Officer: Leave this field blank.	N/A	
		Period of Performance: Add or change the effective and completion dates if necessary.	O	
		Is this an IT-related purchase?: Select "Yes" if this is IT related.	O	

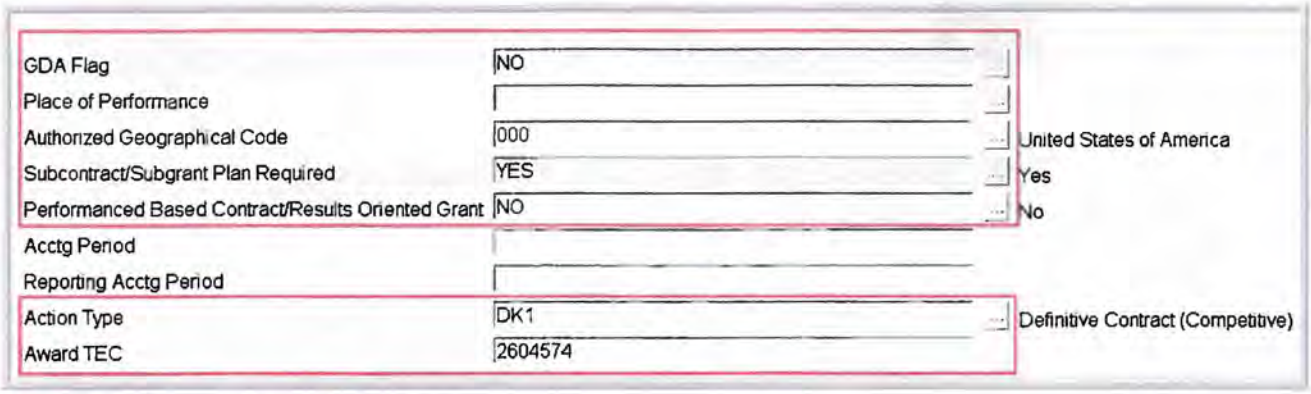


Figure 10: Main / Additional Info Screen

Steps	Section	User Action	Guidance
14. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **GDA Flag:** Select "YES" if the Solicitation is a Global Development Alliance action. — R **Place of Performance:** Enter the three-digit code indicating the country where the work will be performed. — R **Authorized Geographical Code:** Enter the three-digit code indicating the country that is authorizing the work to be done. — R **Subcontract/Subgrant Plan Required:** Select "YES" if a subcontracting plan is required. — R **Performance Based Contract/Results Oriented Grant:** Select "YES" if this will be a performance-based contract. — R **Action Type:** Enter the code that identifies the type of procurement action. — R **Award TEC:** The total estimated cost of the award is copied forward from the Requisition. — R	The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters. If the award is incrementally funded, the **Award TEC** amount will be greater than the committed amount. This is the Requestor's way to specify the award TEC and an indicator for you to upward adjust the amount on the Solicitation.
15.	Additional Info	Click the **Text** link on the left-hand menu (not shown).	

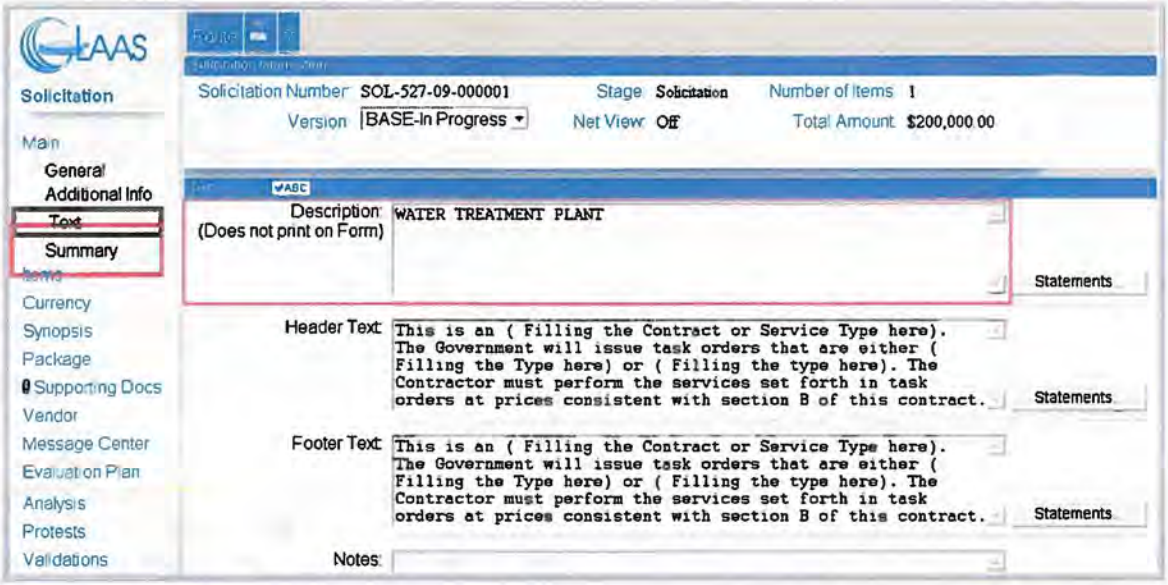


Figure 11: Main / Text Screen

Steps	Section	User Action	Guidance
16.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be advertised with this Solicitation. The information will not print on the Solicitation form. — R **Header Text:** Enter header text or click the **Statements** button to the right of the field and select header text. The information will appear immediately above the line item information on the Solicitation form. — O **Footer Text:** Enter footer text or click the **Statements** button to the right of the field and select footer text. The information will appear immediately below the line item information on the Solicitation form. — O **Notes:** Enter notes or click the **Statements** button to the right of the field and select notes. The information will not appear on the Solicitation form. — O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Use the **Main / Text** screen to enter text that applies to all line items in the Solicitation. You can also cut and paste text information into these fields. Each field will hold up to seven typed pages. The **Statements** button contains standard language and can be edited once loaded in the field.
17.	Main / Text	Click the **Summary** link on the left-hand menu.	

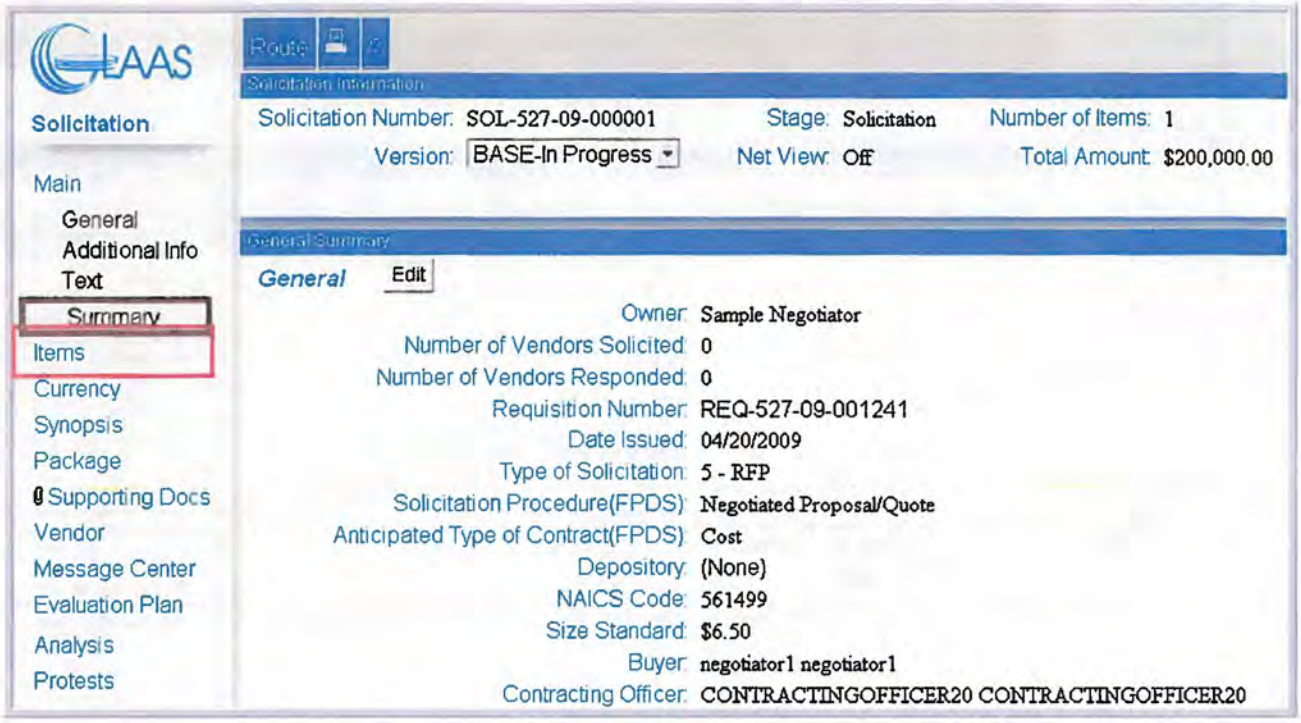


Figure 12: Main / Summary Screen

Steps	Section	User Action	Guidance
18.	Main / Summary	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your document thus far. Click the various **Edit** buttons (Edit) to make any changes.
19.	Main / Summary	Click the **Items** link on the left-hand menu.	

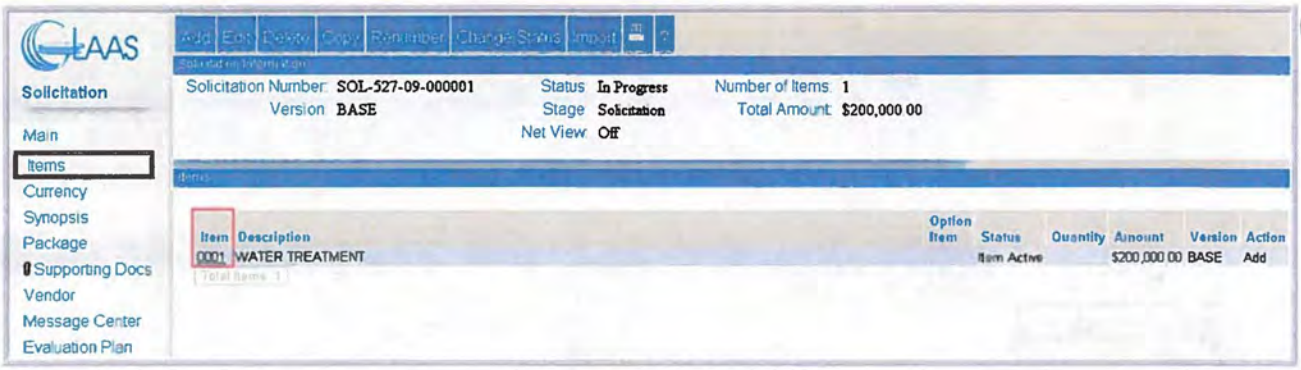


Figure 13: Items Screen

Steps	Section	User Action	Guidance
20.	Items	Click an **Item** number link to view Item Details.	

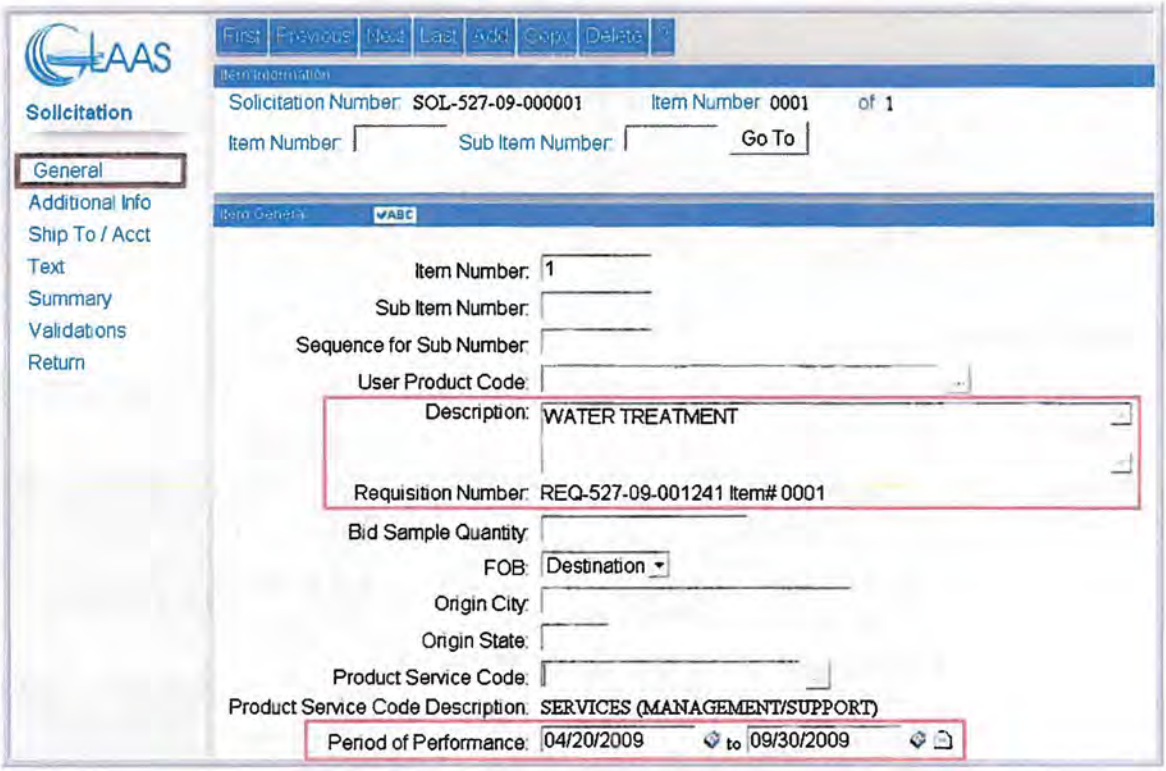


Figure 14: Items / General Screen

Steps	Section	User Action	Guidance
21.	Items / General	Complete the following Required (R) and/or Optional (O) fields:	USAID is not currently using these fields: • **Sub Item Number** • **Sequence for Sub Number** • **User Product Code**

Description: Enter a description for the item.	R
Requisition Number: The system will display the linked Requisition information.	R
Bid Sample Quantity: If ordering Supplies, enter the sample amount you would like to receive with the bid.	O
FOB: GLAAS defaults to "Destination" for shipping responsibility. If "Origin" is selected, then the **Origin City** and **Origin State** fields must be entered.	O
Product / Service Code: Enter the code to identify the product or service being ordered.	O
Period of Performance: Enter the effective and completion dates for the item.	R

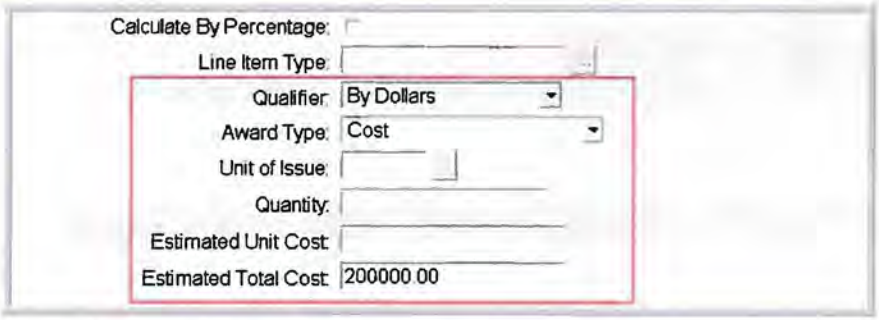


Figure 15: Items / General Screen

Steps	Section	User Action	Guidance
21. cont.	Items / General	Complete the following Required (R) and/or Optional (O) fields: **Line Item Type:** Select an appropriate type if applicable. — O **Qualifier**: Do not change the entry, which defaults from the Requisition. — R **Award Type:** Select the Award Type. Based upon this selection some additional fields may appear or will be labeled differently. — R **Unit of Issue/Quantity/Est. Unit Cost:** If "By Quantity" was selected on the Requisition as the **Qualifier**, these are required fields. — R/O **Estimated Total Cost**: Enter the total estimated cost for this item. If "By Dollars" was selected on the Requisition as the **Qualifier**, this field is read/write. If "By Quantity" was selected on the Requisition as the **Qualifier**, the amount in this field will auto-populate. — R	Based on the **Award Type**, this screen may have additional fields. The **Estimated Total Cost** is the committed amount from the Requisition. If the **Award Type** is "Fixed Price", the committed amount would populate the **Amount** field (not shown). If the award will be incrementally funded, adjust the Solicitation line item amounts to reflect the total estimated cost for the award, which will be greater than the committed amount. This value can be found on the **Award TEC** field on the **Main / Additional Info** screen. If adjusting the dollar amounts from the Requisition, you will need to do it in two places for each line item: • Adjust the line item **Estimated Total Cost** on the **Items / General** screen. • Adjust the **Ship To Amount** on the **Items / Ship To** screen (not shown). USAID is not currently using the **Calculate By Percentage** field.
22.	Items / General	Click the **Additional Info** link on the left-hand menu (not shown).	

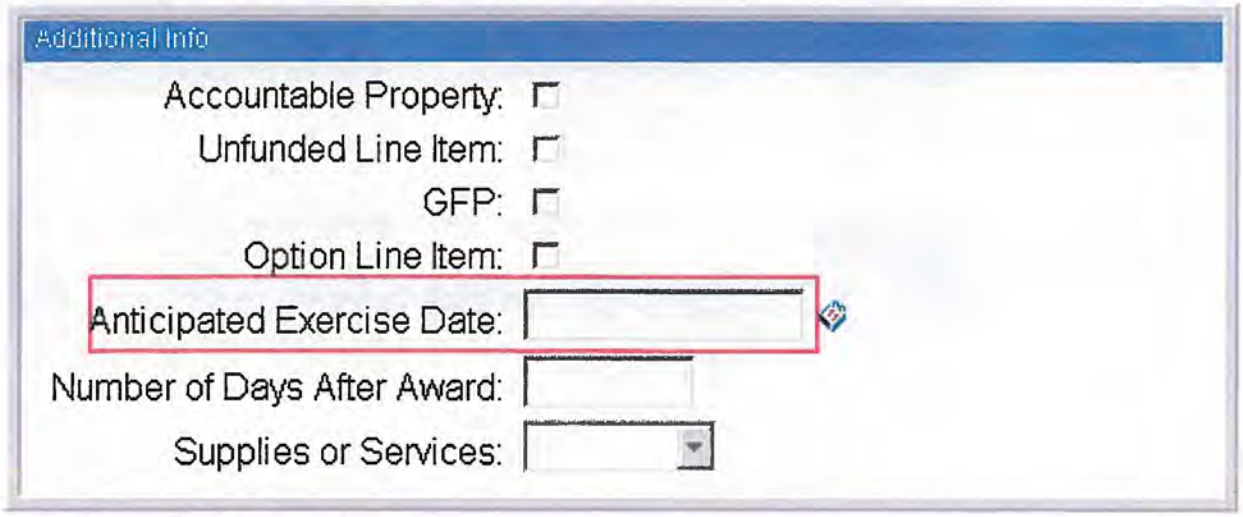


Figure 16: Items / Additional Info Screen

Steps	Section	User Action	Guidance
23.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Unfunded Line Item:** Check this box if this line item will not have any funding associated with it and to zero out the committed value of the item. — O **GFP:** Check this box if the item is Government Furnished Property and to zero out the value of this item. — O **Option Line Item:** Select this checkbox if this is an option line item and to zero out the committed value of the item. — O **Anticipated Exercise Date:** If the Option Line Item is selected, you are required to enter the date you think you will exercise this option. Or enter the **Number of Days After Award** you expect to exercise this option. — R/O	USAID is not currently using these fields: • **Accountable Property** • **Supplies or Services**
24.	Additional Info	Click the **Ship To / Acct** link on the left-hand menu (not shown).	

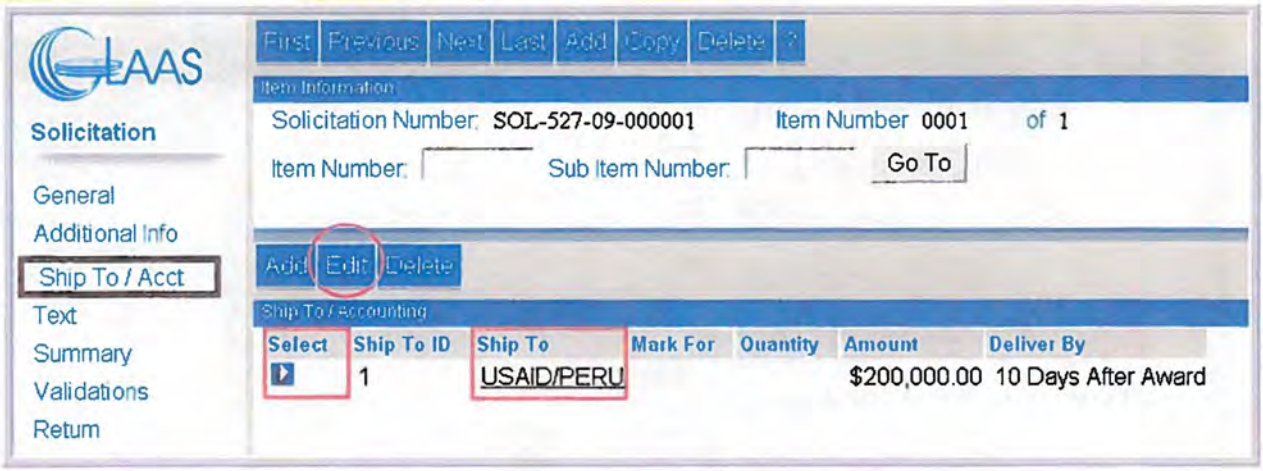


Figure 17: Items / Ship To / Acct Screen

Steps	Section	User Action	Guidance
25.	Items / Ship To / Acct	To change the **Ship To Amount**: Select a Ship To and click the **Edit** toolbar button OR Click the **Ship To** link.	The **Ship To Amount** will be the committed amount from the Requisition.

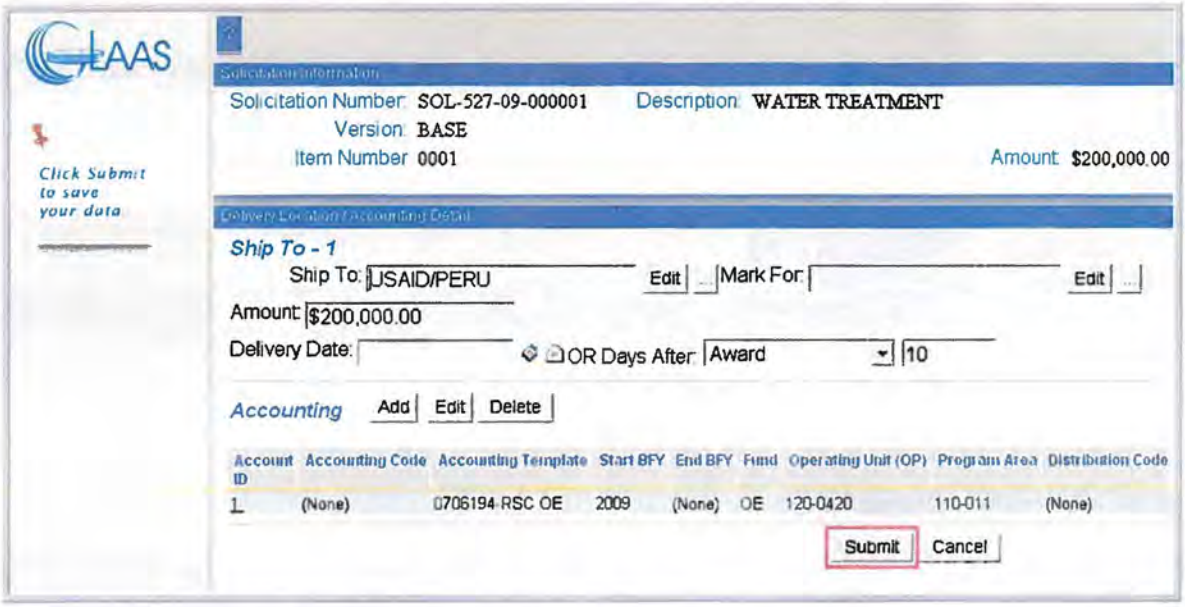


Figure 18: Delivery Location / Accounting Detail Screen

Steps	Section	User Action	Guidance
26.	Delivery Location / Accounting Detail	Edit the **Delivery Date / OR Days After** if necessary.	The **Ship To Amount** will be the committed amount from the Requisition. The Accounting information is copied from the Requisition. This represents the committed amount for this Solicitation line item. Do not change the Accounting information in a Solicitation. **WARNING!** Changing the funding information in a Solicitation will prevent you from processing your GLAAS Award and will cause problems with reconciliation.
27.	Delivery Location / Accounting Detail	Click the **Submit** button to save your changes.	

Figure 19: Ship To / Accounting Screen

Steps	Section	User Action	Guidance
28.	Ship To / Acct	Click the **Text** link on the left-hand menu.	The **Ship To / Acct** screen should reflect any changes you made on the **Delivery Location / Accounting Detail** screen.

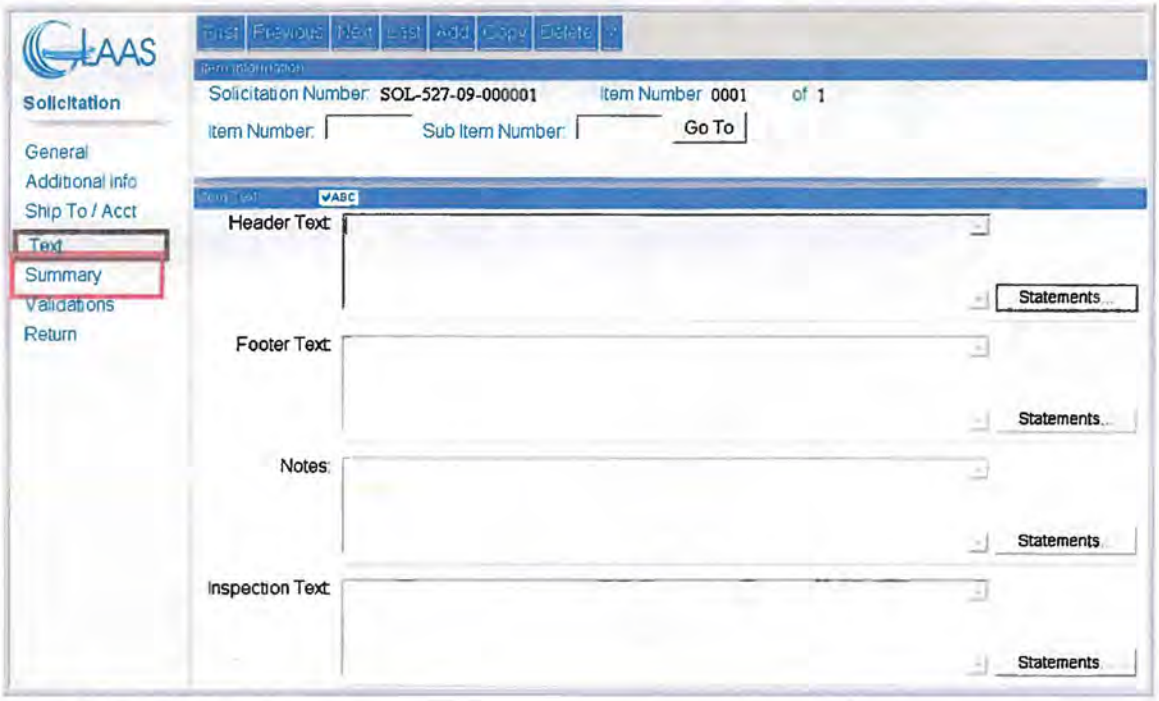


Figure 20: Items / Text Screen

Steps	Section	User Action	Guidance
29.	Item Text	Complete the following Required (R) and/or Optional (O) fields: **Header Text:** Enter header text or click the **Statements** button to the right of the field and select header text. The information will appear immediately above the line item information on the Solicitation form. — O **Footer Text:** Enter footer text or click the **Statements** button to the right of the field and select footer text. The information will appear immediately below the line item information on the Solicitation form. — O **Notes:** Enter notes or click the **Statements** button to the right of the field and select notes. The information will not appear on the Solicitation form. — O	Use the **Items / Text** screen to enter text that only applies to this particular line item. **WARNING!** Delete text that should not be viewed by external audiences such as CLIN Total Estimated Amounts. You can cut and paste text from other documents into the GLAAS text fields. Each field will hold up to seven typed pages. The **Statements** button contains standard language and can be edited once loaded in the field. Both the **Header Text** and the **Footer Text** will carry forward to the Award. USAID is not currently using the **Inspection Text** field.
30.	Item Text	Click the **Summary** link on the left-hand menu.	

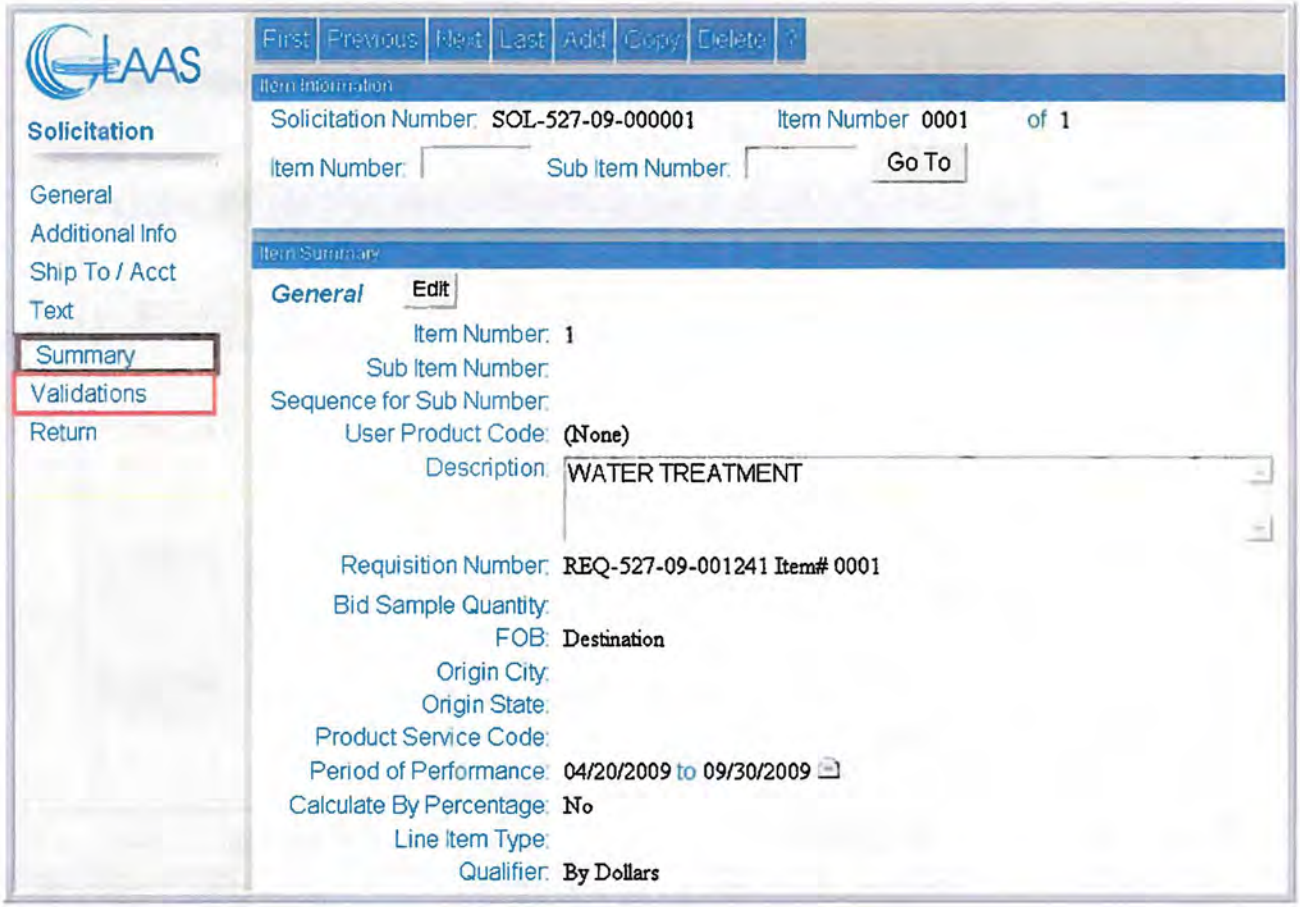


Figure 21: Items / Summary Screen

Steps	Section	User Action	Guidance
31.	Item Summary	Review the **Item Summary** screen to verify that all information is accurate.	The **Summary** screen displays information that has been entered so far Click the **Edit** button (Edit) on this screen if something needs to be changed.
32.	Item Summary	Click the **Validations** link on the left-hand menu.	

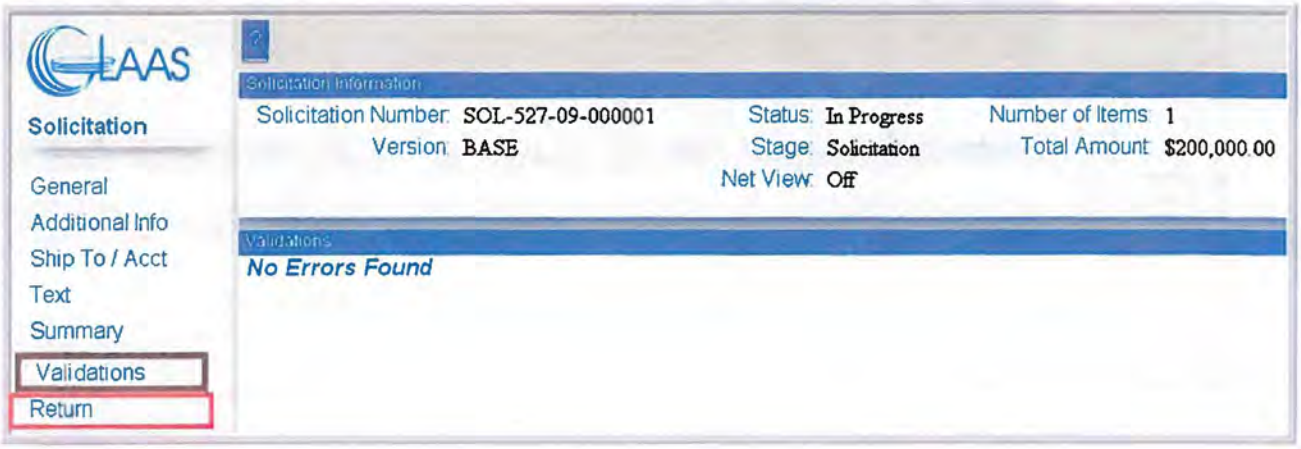


Figure 22: Items / Validations Screen

Steps	Section	User Action	Guidance
33.	Items / Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item.	The **Validations** screen appears with a list of **Error Messages** and/or a list of **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
34.	Items / Validations	Click the **Return** link on the left-hand menu.	

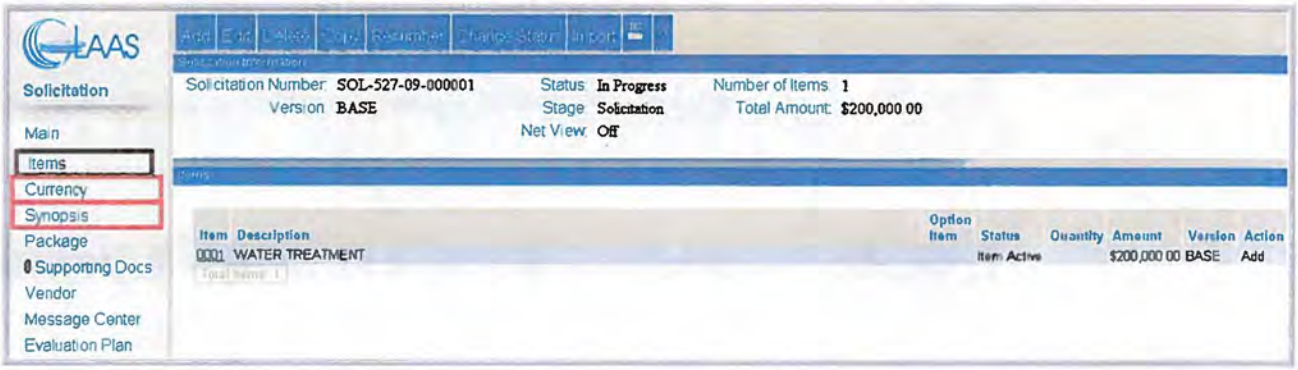


Figure 23: Items Screen

Steps	Section	User Action	Guidance
35.	Items	Repeat **Steps 20-34** if you need to Edit/Review additional items.	
36.	Items	Click the **Currency** link on the left-hand menu.	Refer to the userguide *Creating a Contract from a Requisition* for instructions on adding a foreign print currency.
37.	Currency	Click the **Synopsis** link on the left-hand menu to synopsize this Solicitation for FedBizOpps (not	

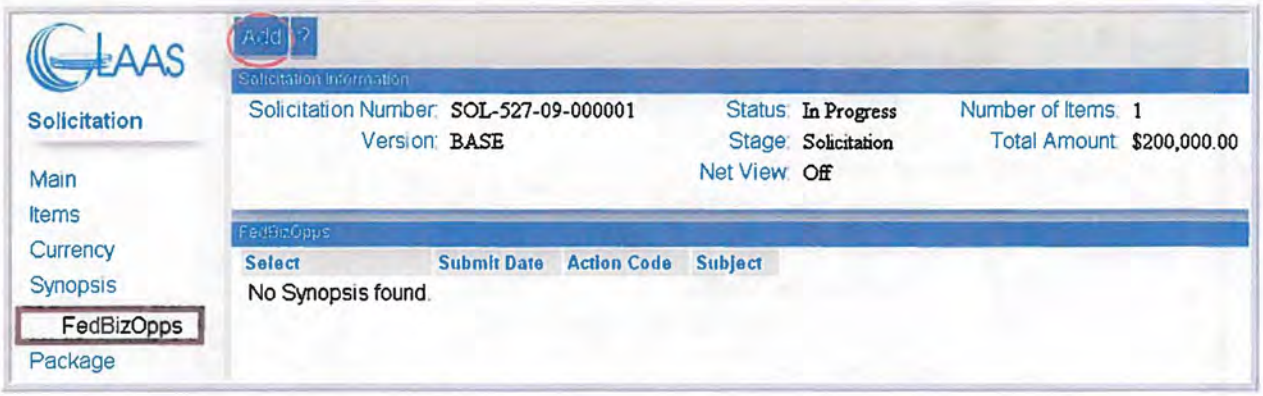


Figure 24: Synopsis / FedBizOpps Screen

Steps	Section	User Action	Guidance
38.	Synopsis / FedBizOpps	Click the **Add** toolbar button.	A Synopsis is required in order to post the Solicitation to the FedBizOpps website. If you entered a **Reason not Synopsized** on the **Main / General** screen, you do not need to synopsize the Solicitation.

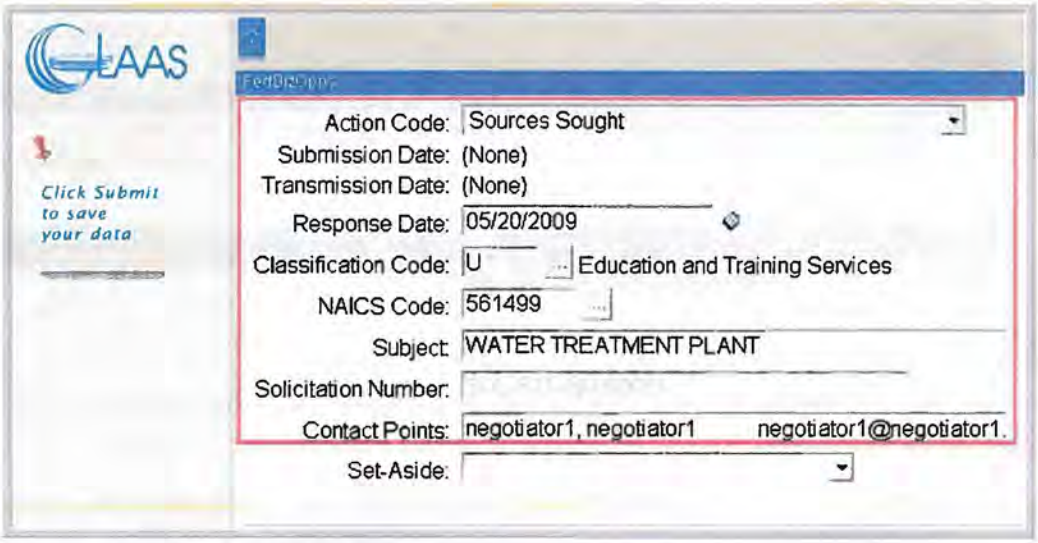


Figure 25: FedBizOpps Screen

Steps	Section	User Action		Guidance
39.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:		GLAAS displays the information needed to post a Synopsis of this Solicitation on FedBizOpps. Most of the information in the Synopsis is pulled from the Solicitation itself. You can change these fields if necessary. You must have a FedBizOpps user ID and password in order to post a Synopsis to FedBizOpps directly from GLAAS.
		Action Code: Select the type of action for this Synopsis.	R	
		Submission/Transmission Date: These dates will auto-populate when the Synopsis is submitted for transmission.	R	
		Response Date: This date will auto-populate if the **Responses Due Date** was entered on the **Main / General** screen.	R	
		Classification Code: Select the appropriate alphanumeric code to categorize the goods or services ordered.	R	
		NAICS Code: This code will auto-populate if entered on the **Main / General** screen.	R	
		Subject: This field will auto-populate from the **Header Text** field on the **Main / Text** screen. Verify the text is appropriate for external audiences.	R	
		Contact Points: This field will auto-populate the Buyer's name from the **Main / General** screen.	R	
		Set-Aside: Select an appropriate value from the dropdown list if applicable.	O	

FedBizOpps

Contracting Office Address

Name: USAID Peru

Address Region: Current Region - US

Address1 00001

Address2

Address3

Address4

City

State

Zip

Country

Web Link

URL: www.usaid.gov/index.html

Description: Office of the Assistant Adminstrator

Email

Address: negotiator1@usaid.gov

Description: negotiator1, negotiator1

Figure 26: FedBizOpps Screen

Steps	Section	User Action	Guidance
44. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields:	

Contracting Office Address: This field will auto-populate the address that was selected as the **Issuing Office** on the **Main / General** screen.	R
Web Link: Enter the **URL** and **Description** of the web link that gives additional information about this Solicitation. Both of these fields must be entered or they may both be left blank.	R/O
Email: This field will auto-populate the email address for the Contracting Officer if it was entered in the system.	O

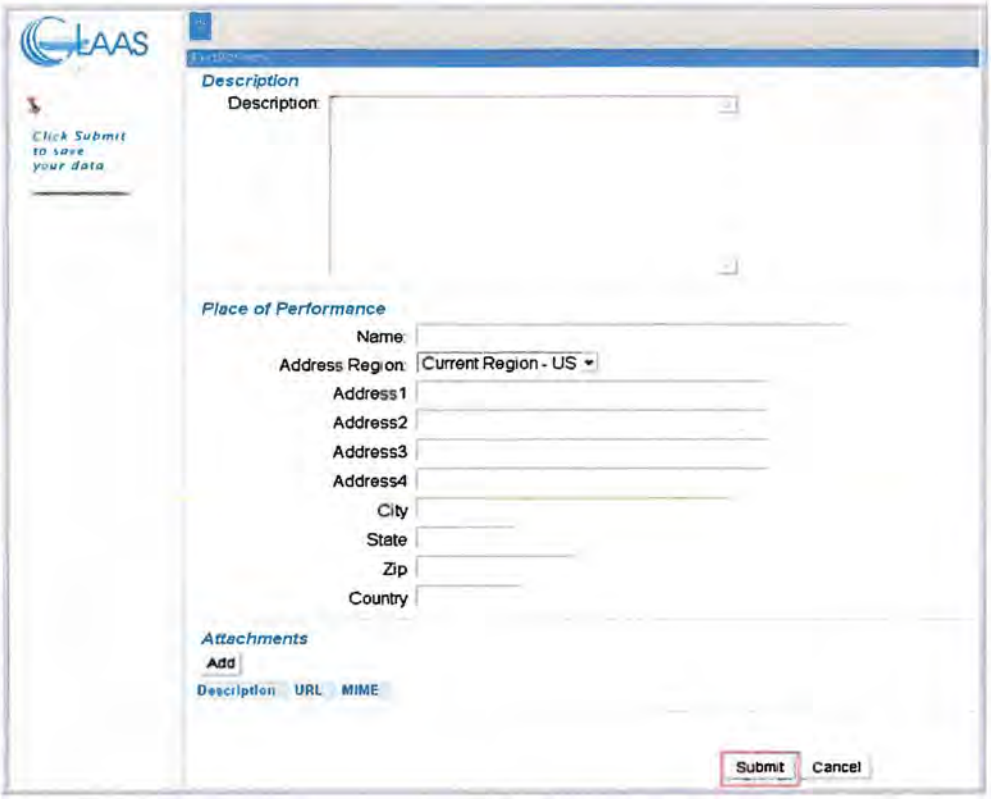


Figure 27: FedBizOpps Screen

Steps	Section	User Action	Guidance
44. cont.	FedBizOpps	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter additional information about the Solicitation. — O **Place of Performance:** Enter the address in which the service is performed or supplies delivered. — O	USAID is not currently using the **Attachments** field.
40.	FedBizOpps	When the Synopsis is complete and approved by the CO, click the **Submit** button to submit the information to FedBizOpps. GLAAS will prompt you to enter a FedBizOpps user ID and password (not shown). After entering a user ID and password, click the **Transmit** button to send the Synopsis to FedBizOpps (not shown).	The CO must review the Synopsis prior to posting on FedBizOpps. Your FedBizOpps user ID and password will be different from your GLAAS user ID and password. After submitting the Synopsis, GLAAS will display a **Submit Date** (not shown).
41.	Synopsis	Click the **Package** link on the left-hand menu (not shown).	

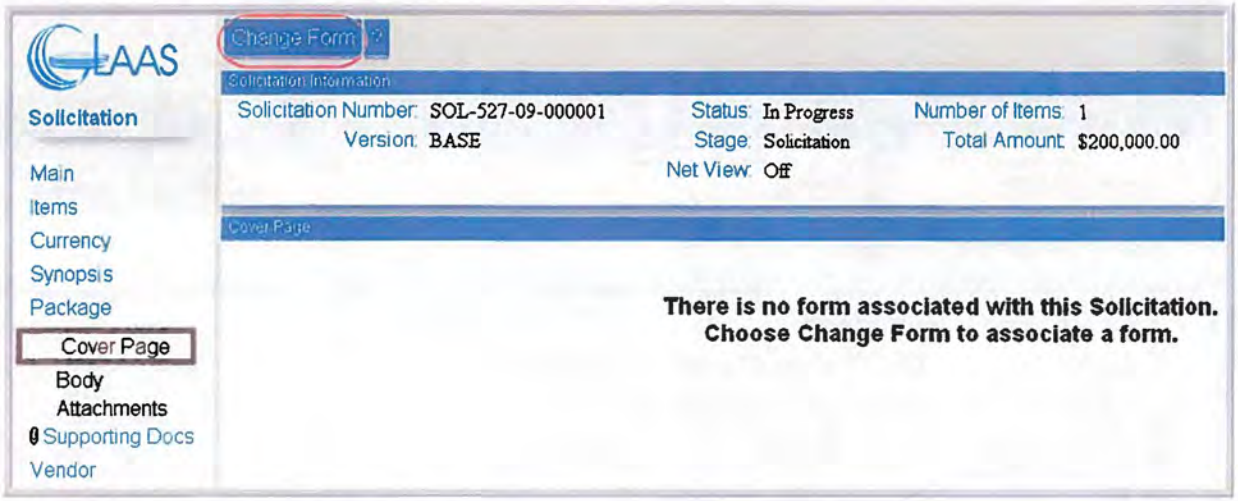


Figure 28: Package / Cover Page Screen

Steps	Section	User Action	Guidance
42.	Package / Cover Page	Click the **Change Form** toolbar button.	

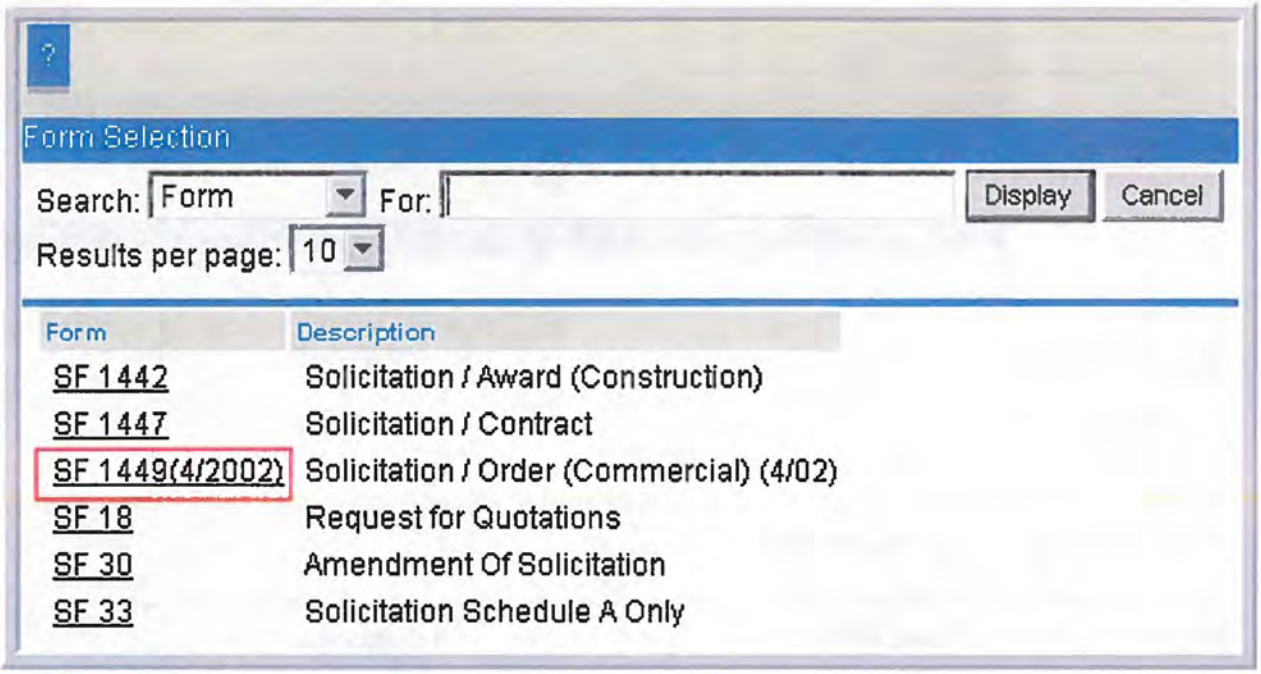


Figure 29: Form Selection Screen

Steps	Section	User Action	Guidance
43.	Form Selection	Click the **Form** link to select a Cover Page.	

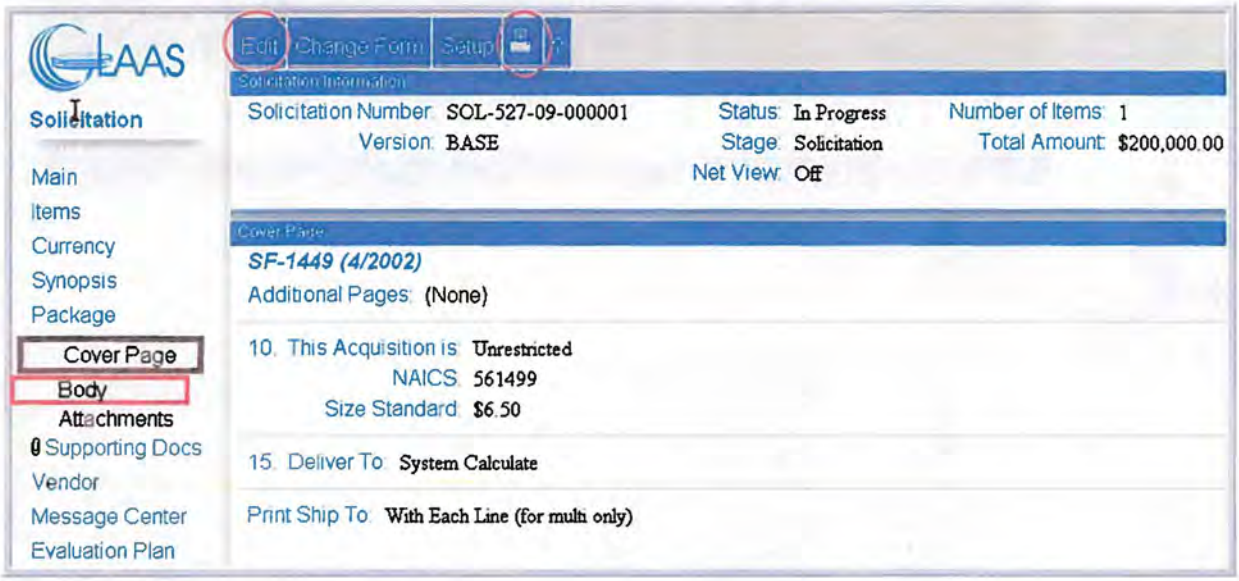


Figure 30: Package / Cover Page Screen

Steps	Section	User Action	Guidance
44.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the Solicitation Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
45.	Package / Cover Page	Click the **Body** link on the left-hand menu to review the clauses in the Solicitation.	

Figure 31: Package / Body Screen

Steps	Section	User Action	Guidance
46.	Package / Body	GLAAS shows the clause sections that will be included in the Solicitation from the Clause Template. You can add, change, or remove clauses if necessary. Click on the **Section Title** of a section to drill down into the clauses for each section (not shown).	The *Working with Clauses* user guide shows you how to add, change, and remove clauses from a GLAAS Solicitation or Award. You must add FAR clauses first, and then add AIDAR clauses. AIDAR templates always display "AIDAR" in the template name. You can add another Clause Template by clicking the **Load Template** toolbar button (not shown).
47.	Package / Body	Click the **Generate** toolbar button when the clauses are complete.	GLAAS generates a modifiable Rich Text Format (.rtf) document that includes all of the clauses for your Solicitation (not shown).

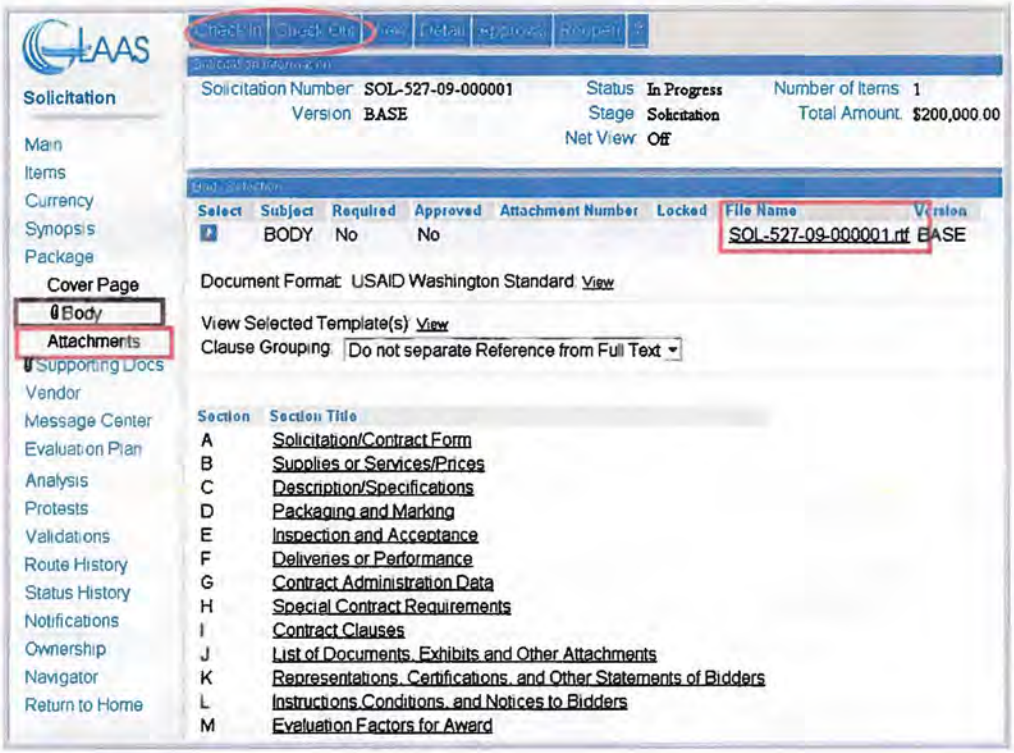


Figure 32: Package / Body Screen

Steps	Section	User Action	Guidance
48.	Package / Body	Modify the Solicitation document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Checking documents in and out of GLAAS prevents multiple people from editing the same document at the same time. When checking a document back in, the file name must be the same as when it was checked out. You can click the ".rtf" link under **File Name** to view the Solicitation document, but any changes you make will not be saved in GLAAS. You must **Check Out** and **Check In** to make edits to the document. The *Working with Clauses* user guide shows you how to **Check Out** and **Check In** documents.
49.	Package / Body	Click the **Attachments** link on the left-hand menu.	

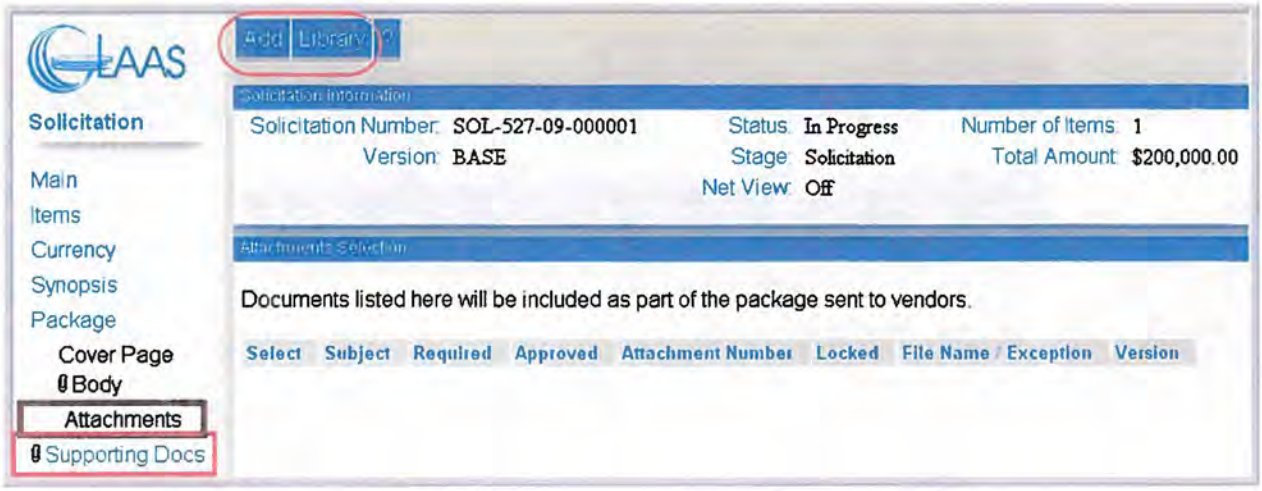


Figure 33: Package / Attachments Screen

Steps	Section	User Action	Guidance
50.			
51.	Package / Attachments	Click the **Add** or **Library** toolbar button to add an attachment to the Solicitation package (not shown). Modify an existing attachment by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any attachments from the Requisition will be pulled into the Solicitation. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Once a document is added here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
52.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	

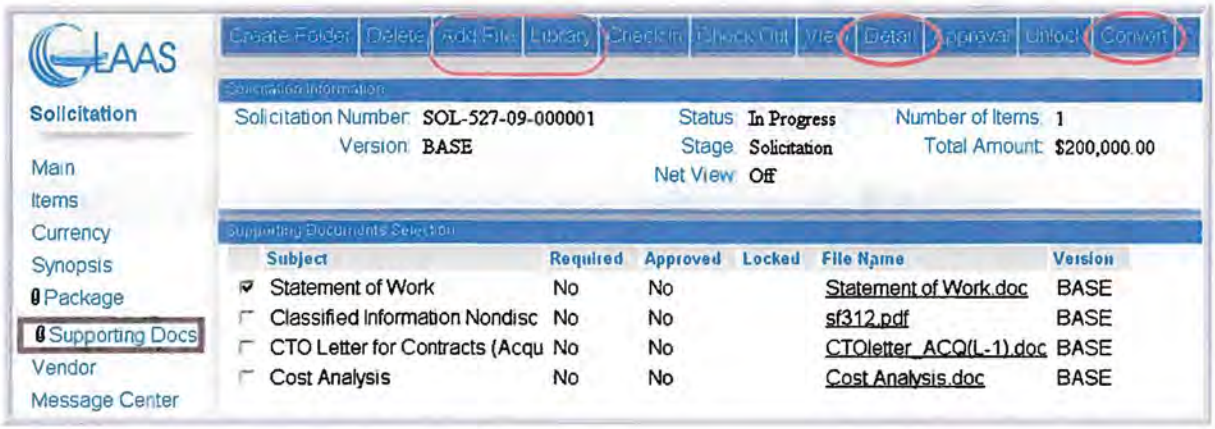


Figure 34: Package / Supporting Docs Screen

Steps	Section	User Action	Guidance
53.	Package / Supporting Docs	Click the **Add File** or **Library** toolbar button to add a supporting document to the Solicitation package. Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any supporting documents from the Requisition will be pulled into the Solicitation. The **Supporting Docs** screen contains documents for internal use that will not be sent to the vendor. Example: "Cost Analysis." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. To allow only users with "Full Access" to view supporting documents, click the **Detail** toolbar button and then check the **Confidential** box (not shown). Once a document is added here, you can use the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments**.

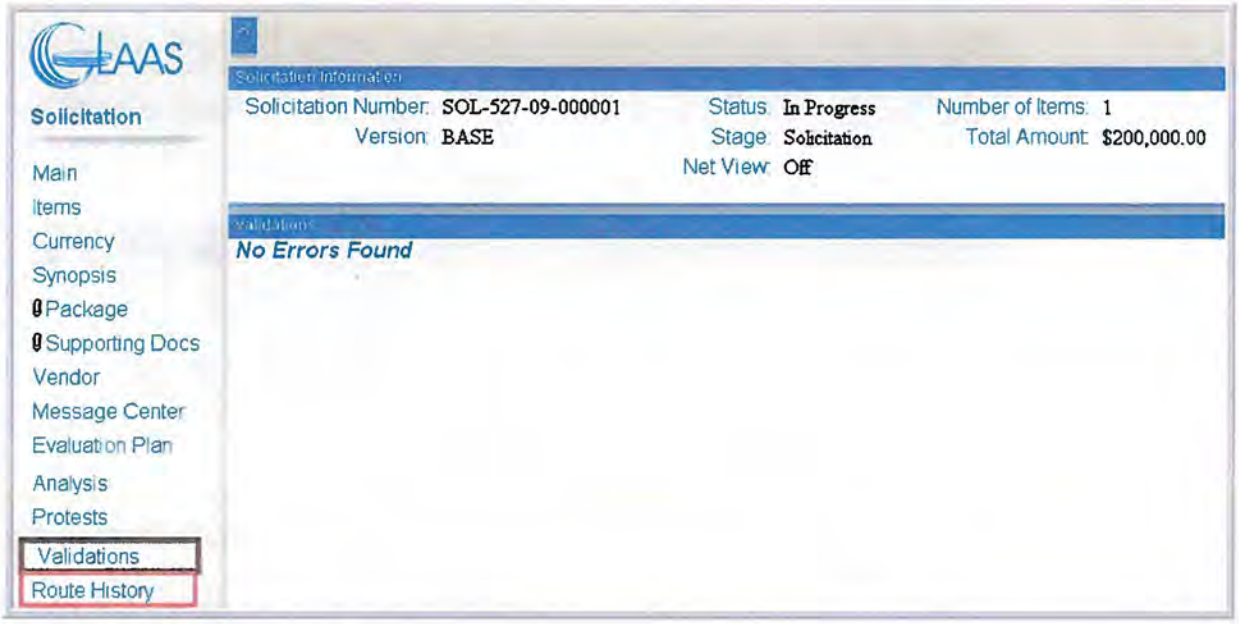


Figure 35: Validations Screen

Steps	Section	User Action	Guidance
54.	Package / Supporting Docs	Click the **Validations** link on the left-hand menu (not shown).	Refer to the *Creating a Vendor List and Vendor Responses* user guide for more information on how to use the **Vendor** link. USAID is not currently using the following links: • **Evaluation Plan** • **Analysis** Evaluations of Solicitations will continue to be handled outside of GLAAS and the results will be uploaded to GLAAS as a supporting document.
55.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Solicitation (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
56.	Validations	Click the **Route History** link on the left-hand menu.	

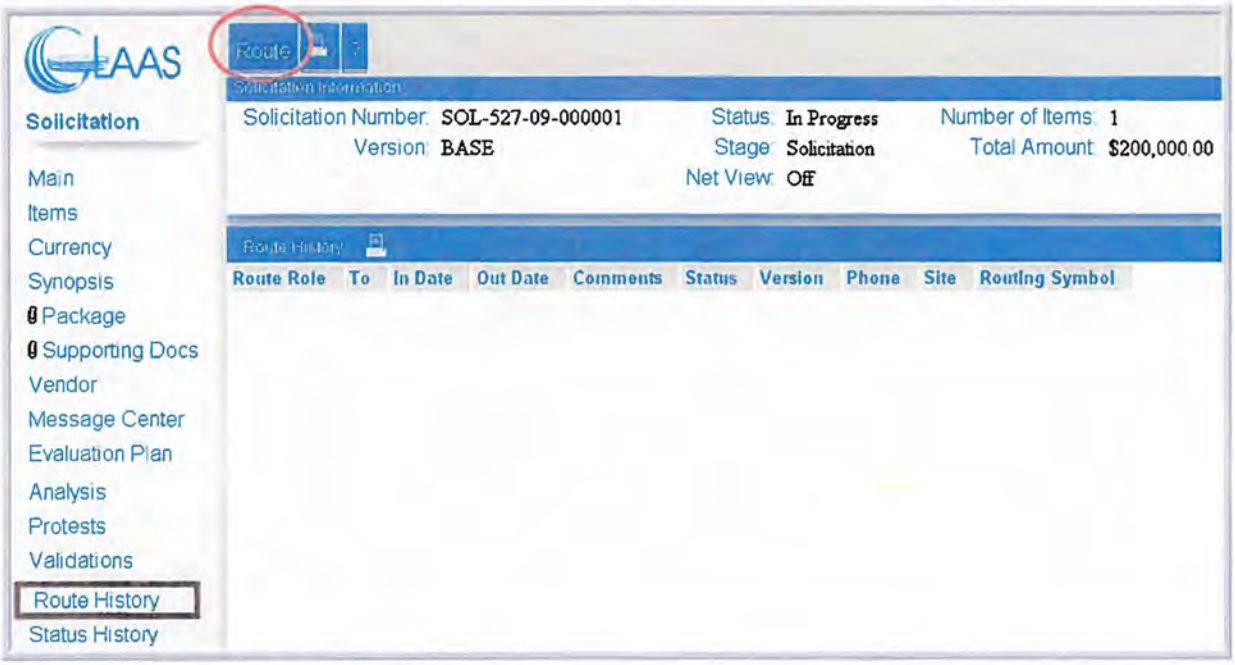


Figure 36: Route History Screen

Steps	Section	User Action	Guidance
57.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
58.	Route History	The Solicitation has been routed for review and approval.	Once the Solicitation is approved and released in GLAAS by the CO, the A&A Specialist needs to log into FedBizOpps and post it.
59.	Route History	Click the **Return To Home** link on the left-hand menu (not shown).	

GLAAS 102 USER GUIDE:

AMENDING A SOLICITATION

PURPOSE:

This user guide will show you how to amend a Solicitation and will define all required fields.

BEFORE STARTING:

1. In order to amend a Solicitation, you must be a Contracting Officer.
2. You should have a Solicitation with the status of "Released."

STEPS:

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Open** link on the **Access Panel** to search for a Solicitation, and then go to **Step 3**. OR Click a Document link under **Recent Documents**, and then go to **Step 4**.	

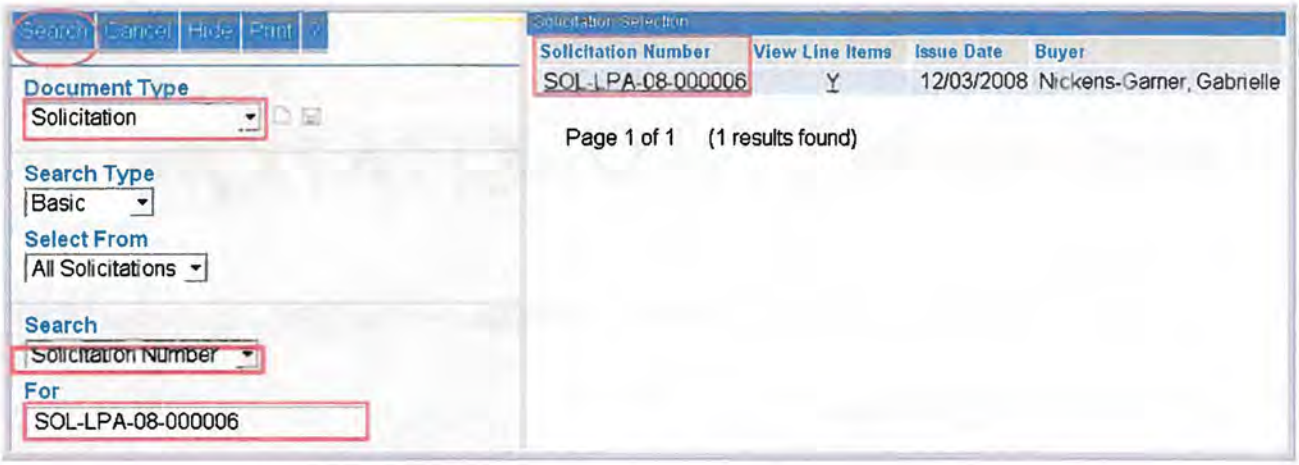


Figure 2: Document Selection Screen

Steps	Section	User Action	Guidance
3.	Document Selection	Complete the following fields: • **Document Type:** Select "Solicitation." • **Select From:** Select "All Solicitations." • **Search:** Defaults to "Solicitation Number." • **For:** Enter the Solicitation number.	**Select From** will default to "My Solicitations." Change this to "All Solicitations" when searching for solicitations created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user (not shown).
4.	Document Selection	Click the **Search** toolbar button.	
5.	Document Selection	Click the **Solicitation Number** link.	

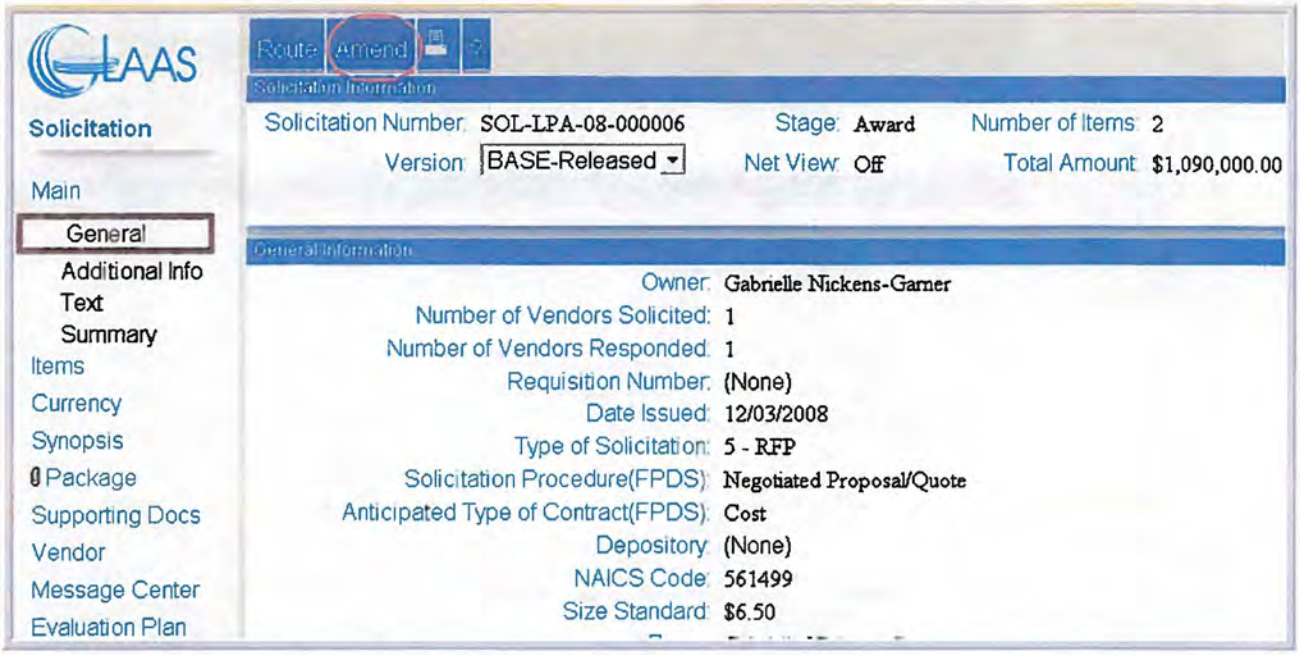


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Select the **Amend** toolbar button.	The Solicitation must be in a "Released" status in order for the **Amend** button to appear.

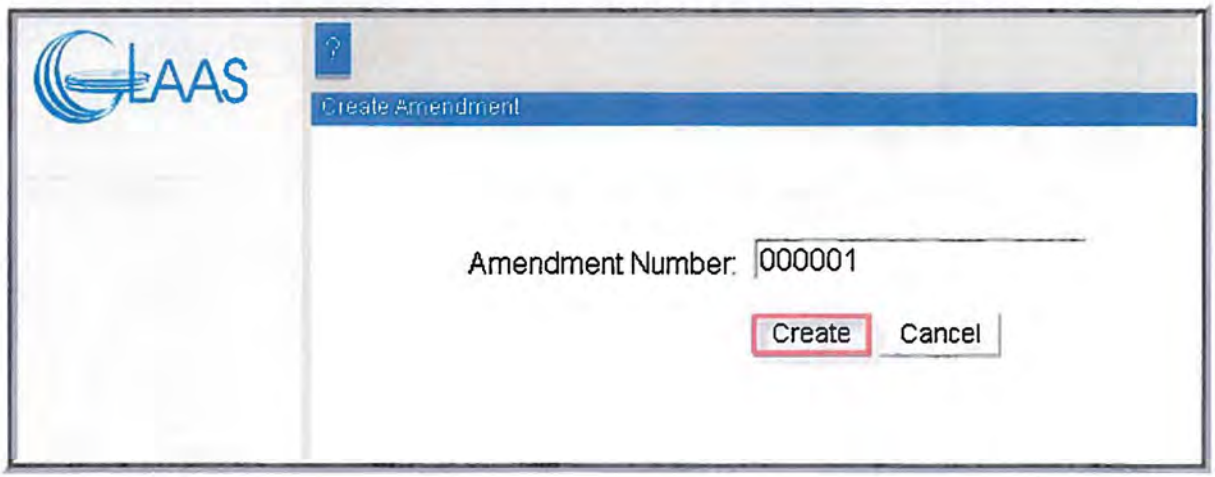


Figure 4: Create Amendment Screen

Steps	Section	User Action	Guidance
7.	Create Amendment	Click the **Create** button.	The **Amendment Number** is automatically generated. Do not modify.

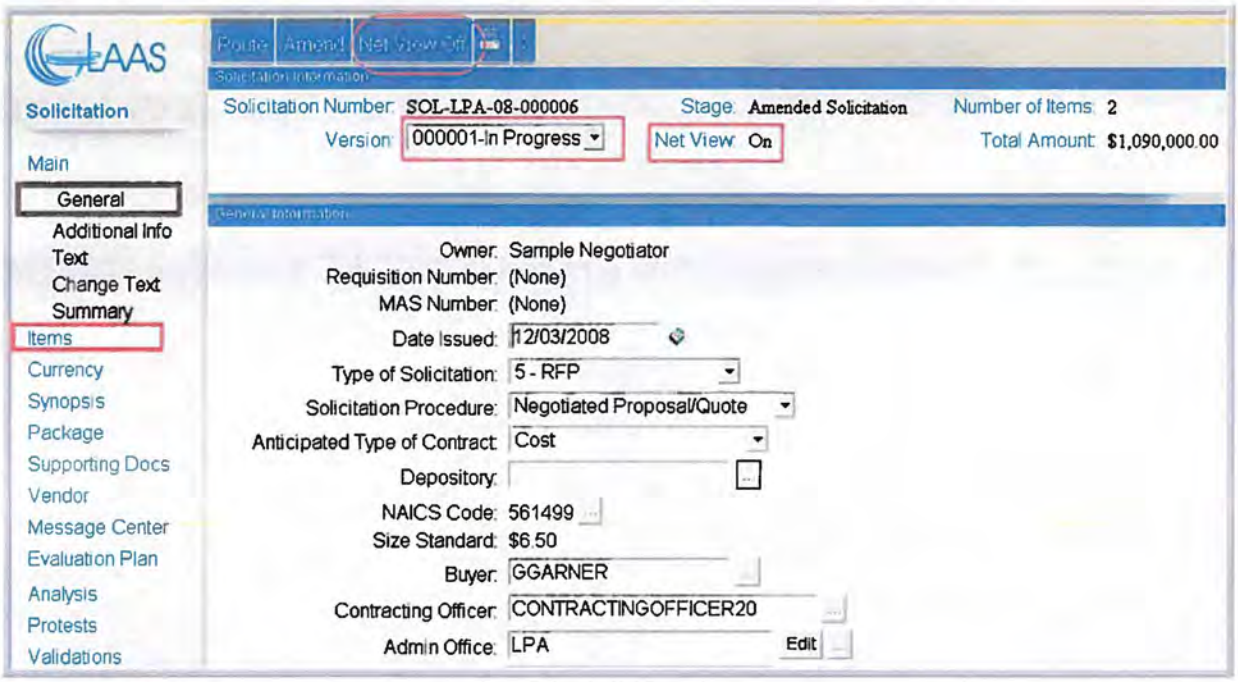


Figure 5: Main / General Screen

Steps	Section	User Action	Guidance
8.	Main / General	All **Main** level fields are now editable and can be updated.	The **Version** dropdown list on the top of the **Main / General** screen allows you to toggle between the "Released" and amended "In Progress" versions of the document. Use the left-hand menu to navigate through the document.
9.	Main / General	Click the **Items** link on the left-hand menu.	

Figure 6: Items Screen

Steps	Section	User Action	Guidance
10.	Items	Click the **Item** number link to update an existing item on an Amended Solicitation, or to add a new item, simply select the **Add** toolbar button.	Refer to the *Creating a Solicitation* user guide for additional detailed steps.

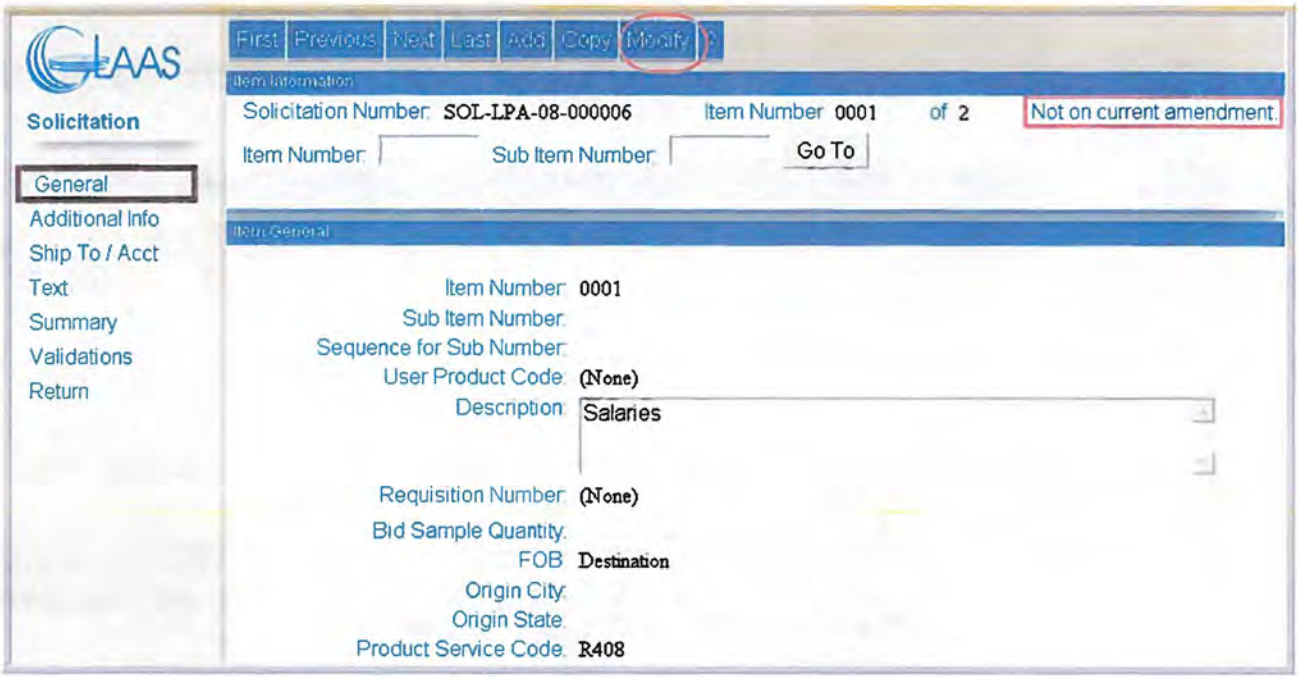


Figure 7: Items / General Screen

Steps	Section	User Action	Guidance
11.	Items / General	Click the **Modify** toolbar button to amend the line item.	When you first open an existing line item, you are viewing a Read-Only version of the line item. The **Not on current amendment** statement indicates that the existing line item is not yet in the Amended Solicitation.

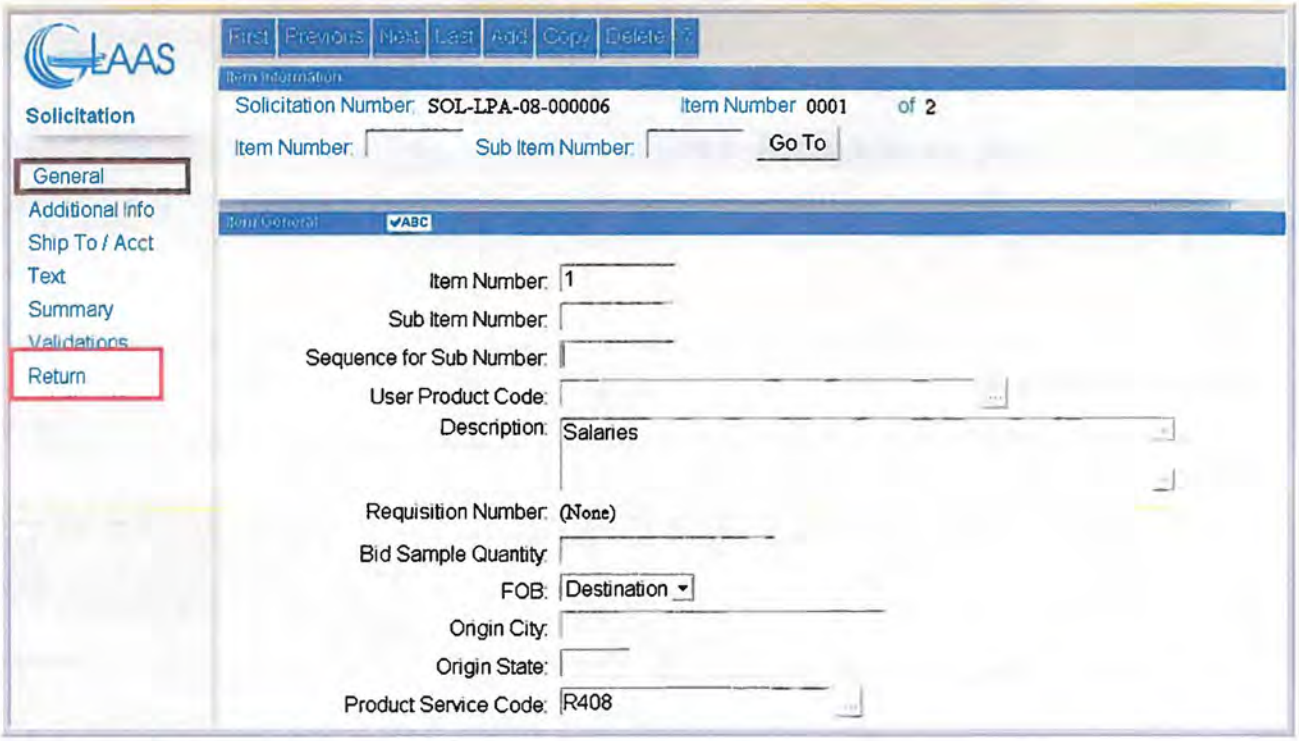


Figure 8: Items / General Screen

Steps	Section	User Action	Guidance
12.	Items / General	Update the fields that need to be changed.	All fields are now editable and can be updated on this item. If you are going to increase or decrease the amount, make sure to enter the new total amount on the **Items / General**, **Items / Ship To** and **Items / Accounting** screens (not shown).
13.	Items / General	Click the **Return** link on the left-hand menu.	

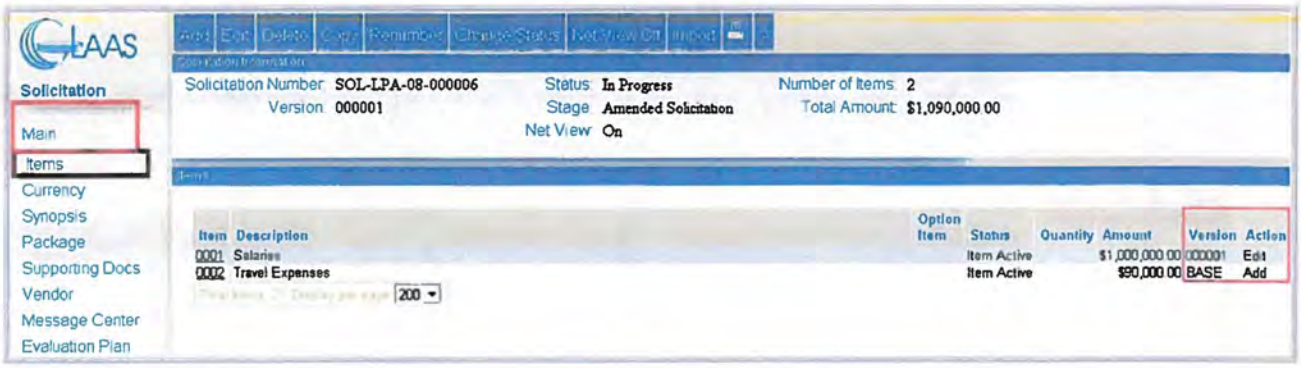


Figure 9: Items Screen

Steps	Section	User Action	Guidance
14.	Items	Click the **Main** link on the left-hand menu.	Having returned to the **Items** screen, you can review which items were edited and on which version of the document.

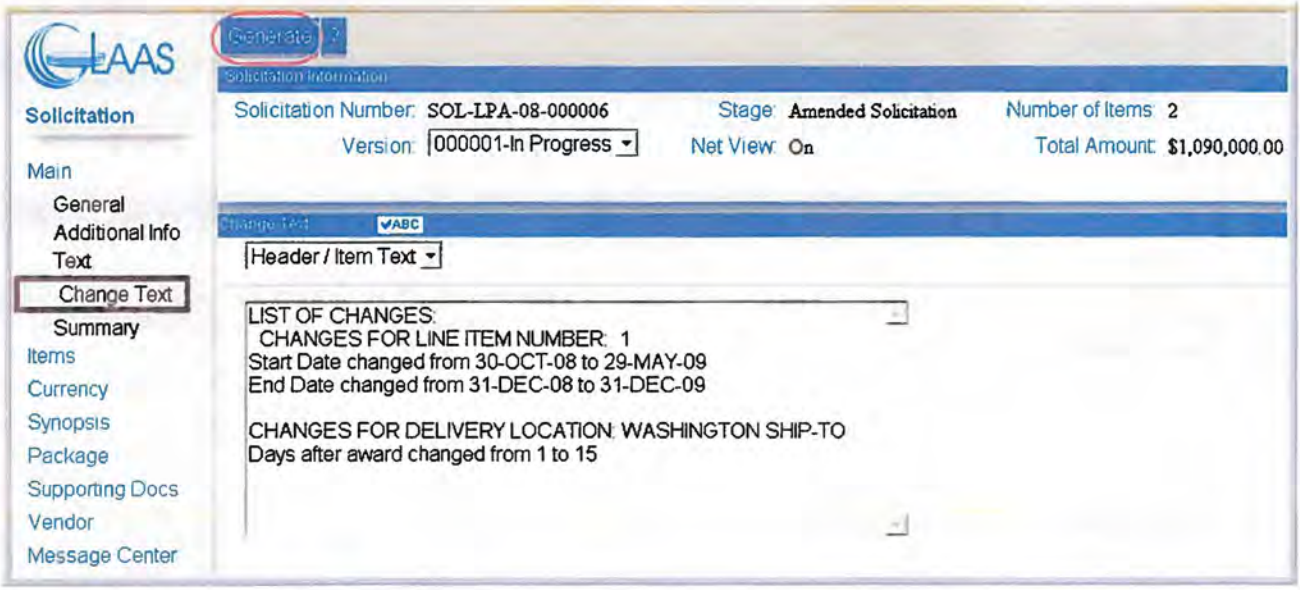


Figure 10: Main / Change Text Screen

Steps	Section	User Action	Guidance
15.	Main / General	Click the **Change Text** link on the left-hand menu to display the **Main / Change Text** screen.	**Change Text** is only available on Amended Solicitations.
16.	Main / Change Text	Click the **Generate** toolbar button. If you have changed the clauses in the **Package/Body**, select the **Header / Item Text** dropdown list and select "Clause Text."	GLAAS tracks all the changes made in the amended version. The text that is generated can be edited. It will print on the schedule of the Solicitation.
17.	Main / Change Text	Click the **Validations** link on the left-hand menu to validate this Solicitation (not shown).	

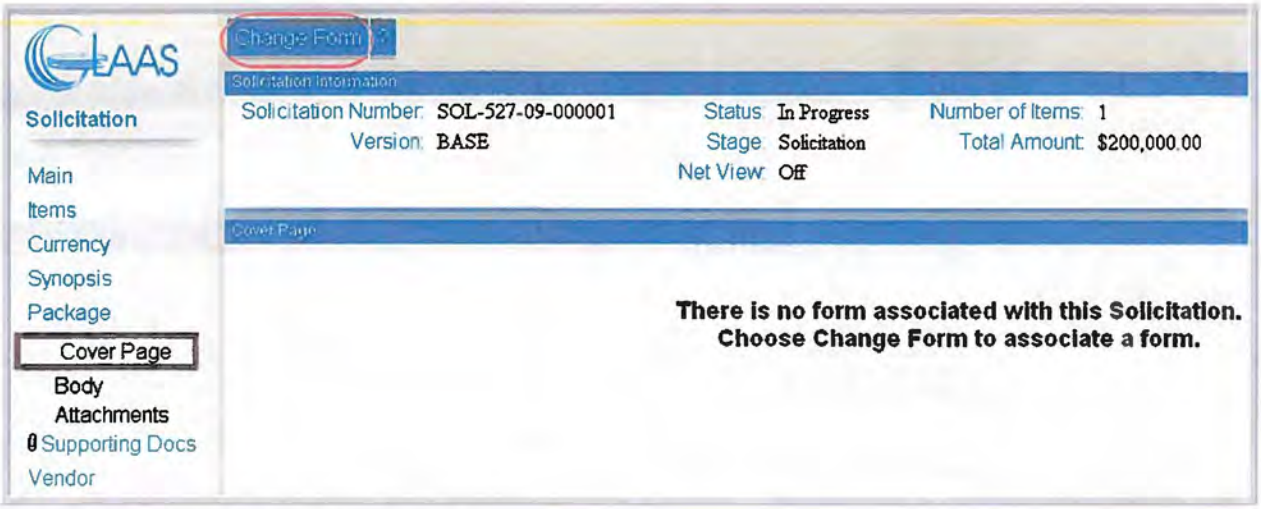


Figure 11: Package / Cover Page Screen

Steps	Section	User Action	Guidance
18.	Package / Cover Page	Click the **Change Form** toolbar button.	

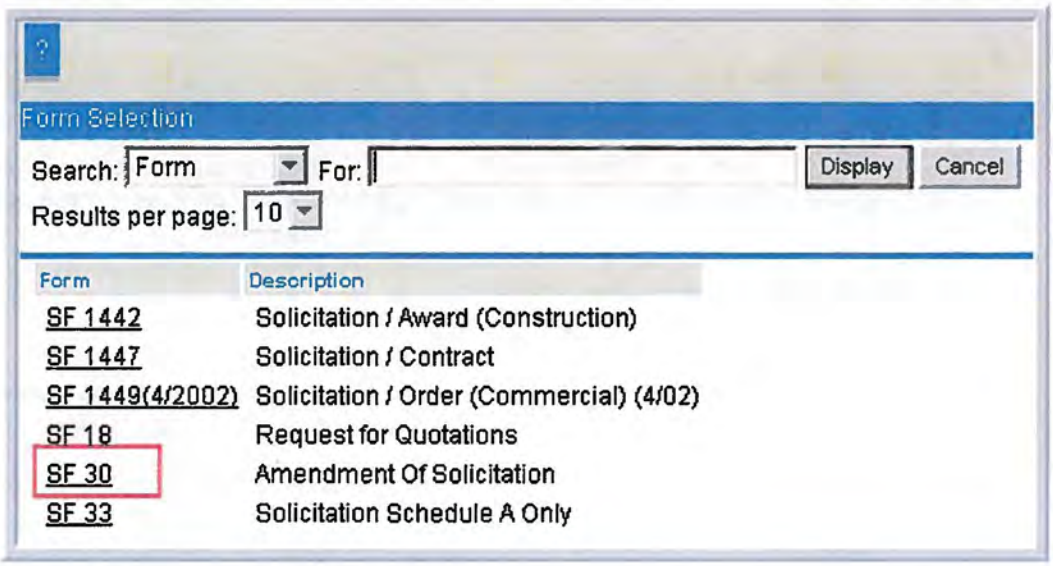


Figure 12: Form Selection Screen

Steps	Section	User Action	Guidance
19.	Package / Cover Page	Click the **Form** link to select a Cover Page.	

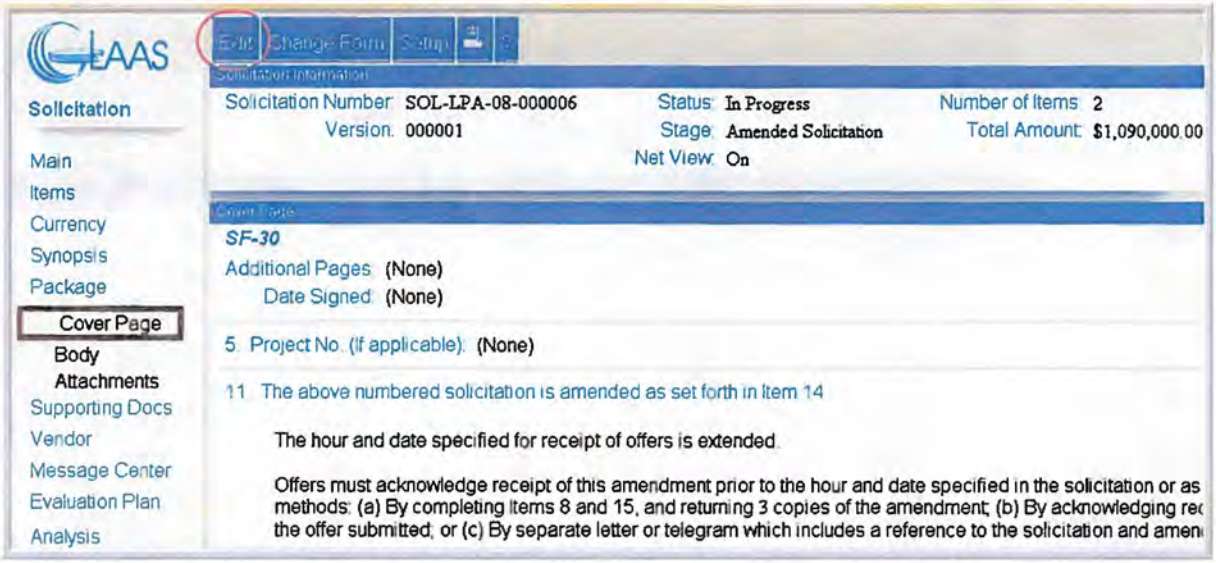


Figure 13: Package / Cover Page Screen

Steps	Section	User Action	Guidance
20.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the amended Solicitation Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS. If you selected the "SF-30" for this amended Solicitation and changed the **Response Due Date** on the **Main / General** screen, you will have to **Edit** this form to reflect that change in Block 11.
21.	Package / Cover Page	Click the **Validations** link on the left-hand menu (not shown).	

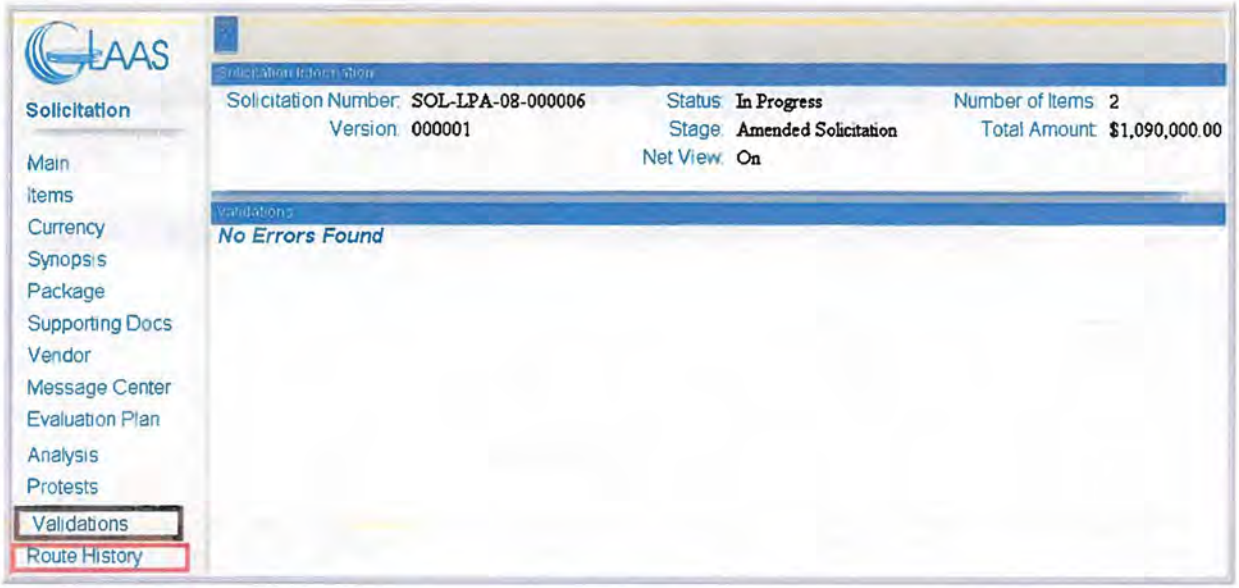


Figure 14: Validations Screen

Steps	Section	User Action	Guidance
22.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Solicitation (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it. If you did not fill in the Phoenix funding information in the **Accounting Information** sections you will receive error messages about these missing values. If there are no GLAAS error messages, the system will prompt you to validate in Phoenix. If you are not approving the document and committing funds, click the **No** button (not shown).
23.	Validations	Click the **Route History** link on the left-hand menu.	

Figure 15: Route History Screen

Steps	Section	User Action	Guidance
24.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
25.	Route History	Click the **Return to Home** link on the left-hand menu (not shown).	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Creating a Funding Opportunity

November 2009

Creating a Funding Opportunity Objectives

- At the end of this topic, you will know how to:
  - Create a Funding Opportunity from a Requisition
  - Add standard provisions and supporting documentation
  - Create the Funding Opportunity Synopsis in Grants.gov
  - Route the Funding Opportunity

Creating a Funding Opportunity Roles & Responsibilities

- The A&A Specialist
  - Creates a Funding Opportunity
  - Sends the synopsis to Grants.gov
  - Generates the standard provisions and supporting documentation
  - Posts the Funding Opportunity on Grants.gov after AO approval
- The Agreement Officer
  - Approves and releases the Funding Opportunity
- The Technical Panel
  - Evaluates the responses outside of GLAAS
  - Ensures that the TEC Memo is uploaded to the Funding Opportunity as a Supporting Document

GLAAS 102 USER GUIDE:

CREATING A FUNDING OPPORTUNITY

PURPOSE:

This user guide will show you how to create a Funding Opportunity from a Requisition in GLAAS. A Funding Opportunity is used to create a Request for Application (RFA) or Annual Program Statement (APS) for a planned assistance award (grant or cooperative agreement).

BEFORE STARTING:

1. In order to create a Funding Opportunity, you must be an A&A Specialist or an Agreements Officer.
2. A Requisition has been assigned to you in your Buyer Workload with the status of "Released."
3. A Milestone Plan has been created and linked to the Requisition.
4. In order to approve a Funding Opportunity, you must be an Agreements Officer.

STEPS:

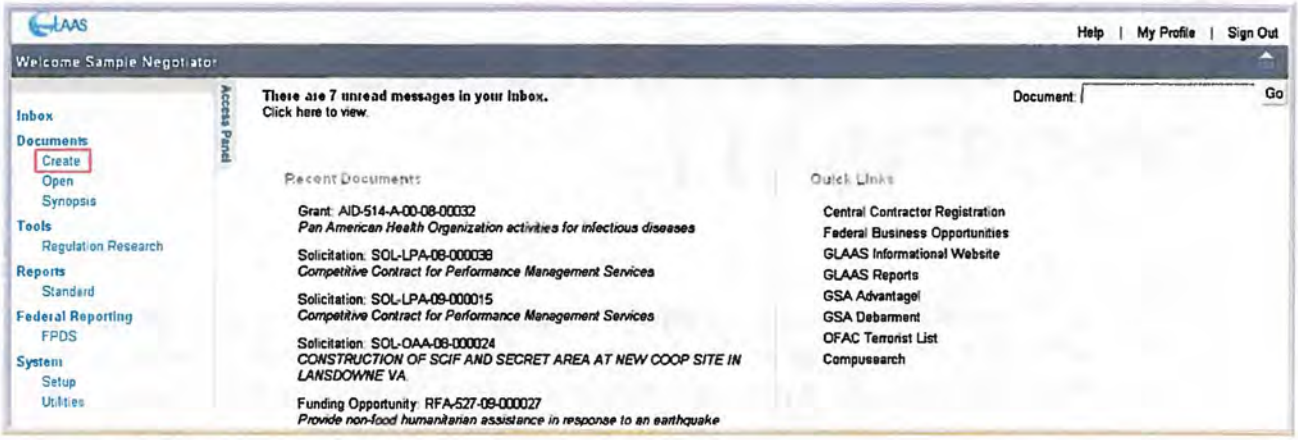


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

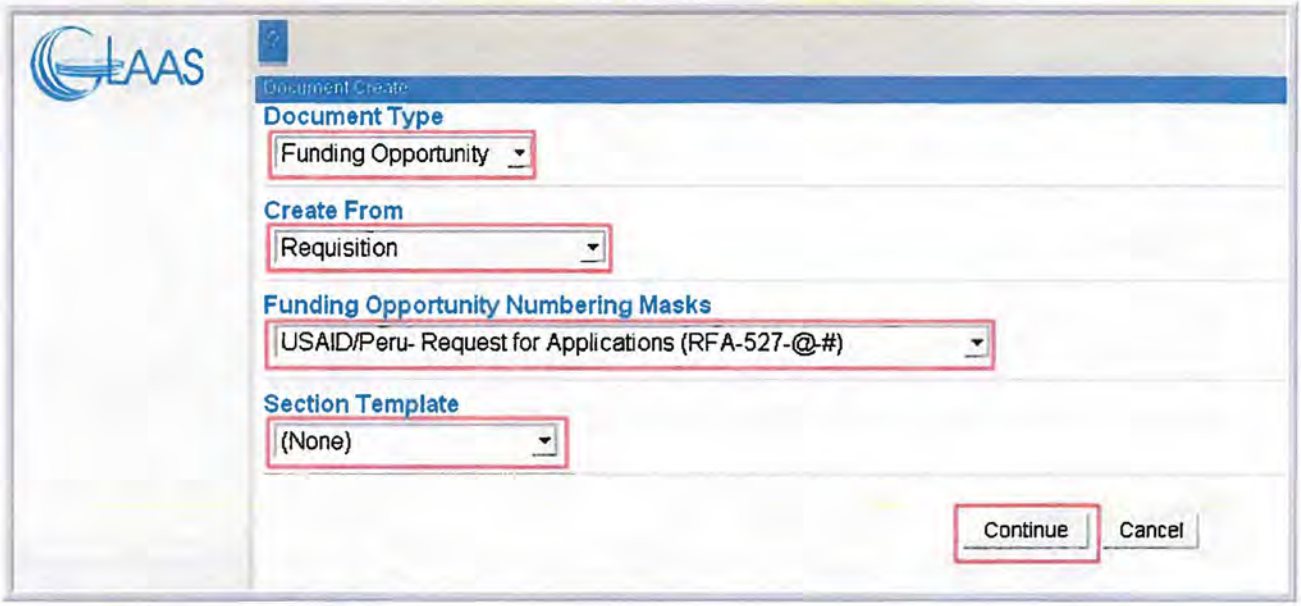


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Funding Opportunity." • **Create From:** Select "Requisition." • **Funding Opportunity Numbering Masks:** Select an appropriate Funding Opportunity mask for your site. • **Section Template:** There are three options to choose from: – **(None):** No clause template is loaded. – **Select PPT:** USAID is not currently using this option. – **Select Clause Template:** Select and load a new clause template.	There are two Funding Opportunity Numbering Masks: • RFA (Request for Applications) • APS (Annual Program Statement) This user guide steps you through selecting a **Section Template** later in the document process. If you wish to load a **Section Template** right away, choose "Select Clause Template" (not shown).
4.	Document Create	Click the **Continue** button.	

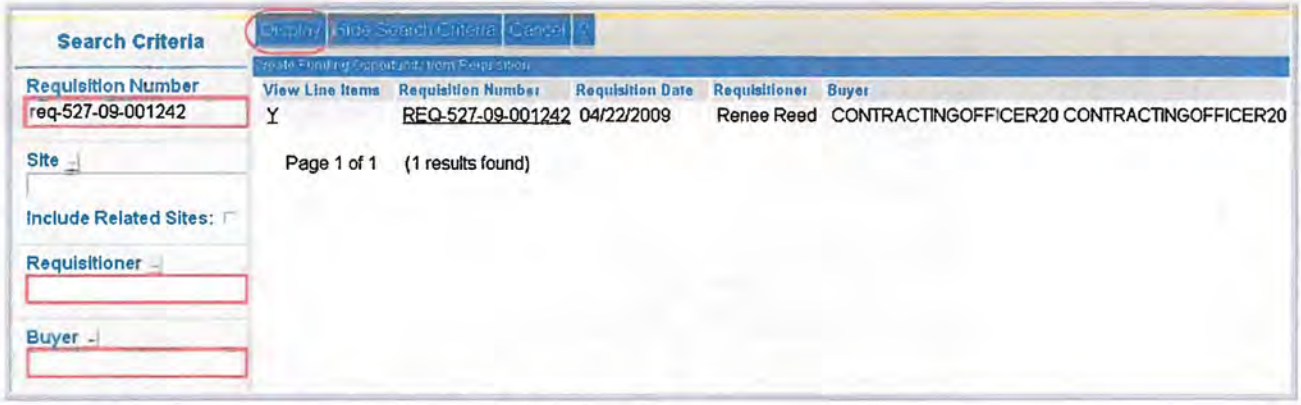


Figure 3: Create Funding Opportunity from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Funding Opportunity from Requisition	Search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (**%**) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor. Clear the **Site** field when searching for a document or a user.

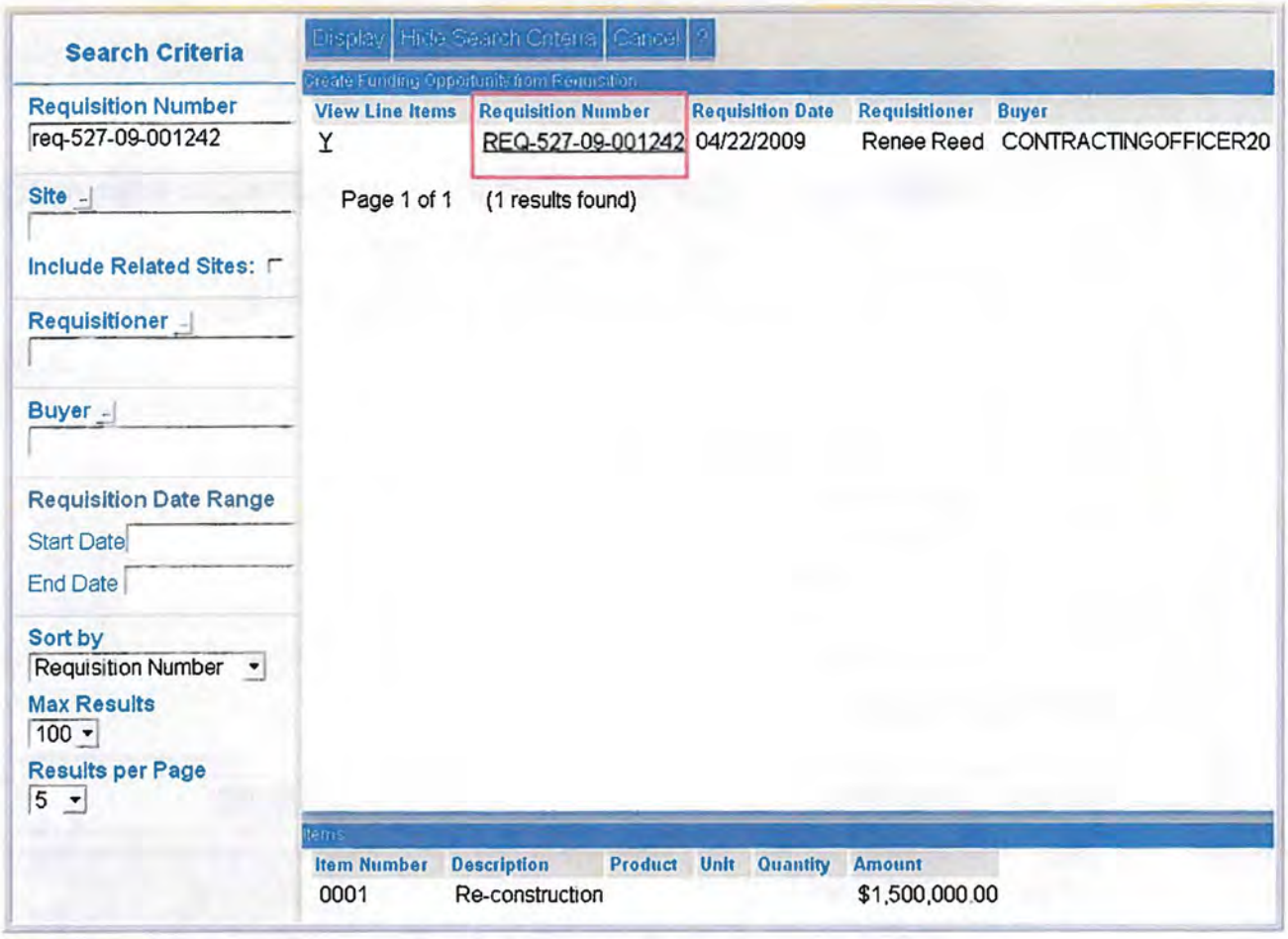


Figure 4: Create Funding Opportunity from Requisition Screen

Steps	Section	User Action	Guidance
6.	Create Funding Opportunity from Requisition	Click the **Requisition Number** of the document you are searching for.	Only "Released" Requisitions will appear in this search screen.

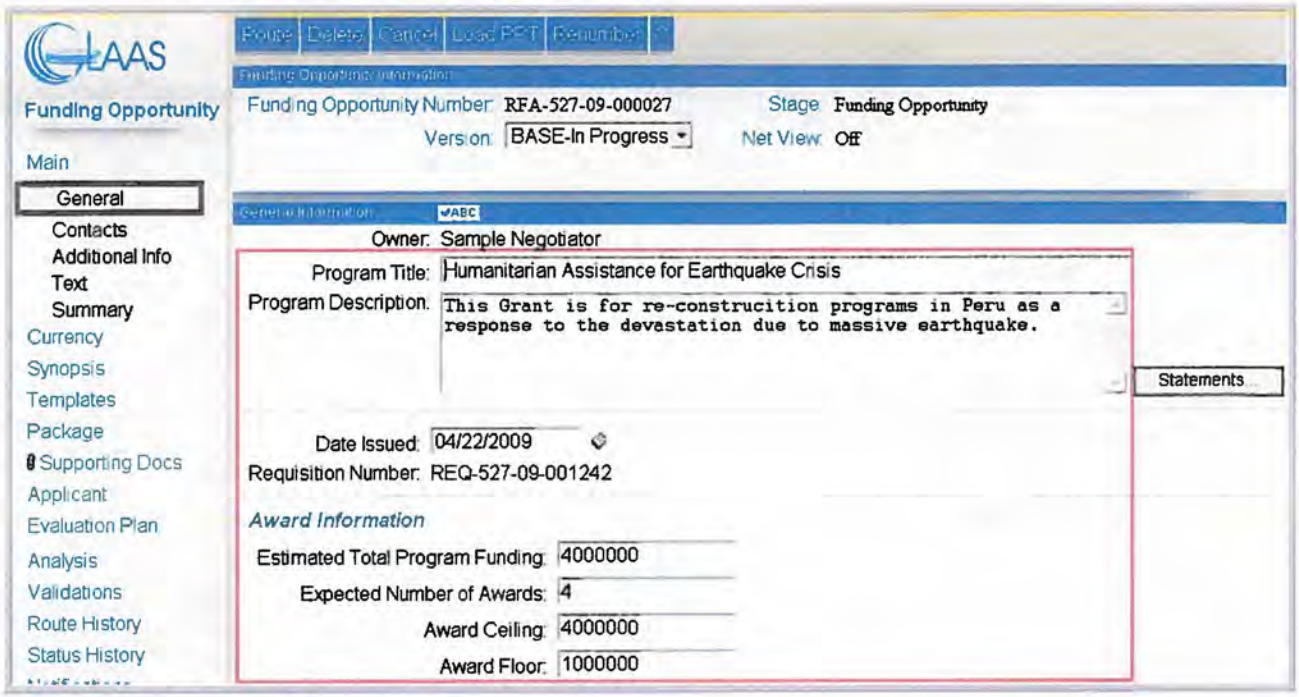


Figure 5: Main / General Screen

Steps	Section	User Action		Guidance
7.	Main / General	Complete the following Required (R) and/or Optional (O) fields:		GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Much of this information will be used to populate the Grants.gov Synopsis.
		Program Title: Enter the Title for this Funding Opportunity Program.	R	
		Program Description: Enter a description for the Funding Opportunity.	R	
		Date Issued: Enter the date the Funding Opportunity was issued.	R	
		Estimated Total Program Funding: Enter the total amount of funding you expect to make available for awards under your Funding Opportunity.	R	
		Expected Number of Awards: Enter the expected total number of awards.	R	
		Award Ceiling: Enter the maximum dollar amount available for an individual award under your Funding Opportunity.	R	
		Award Floor: Enter the minimum dollar amount available for an individual award under your Funding Opportunity.	R	

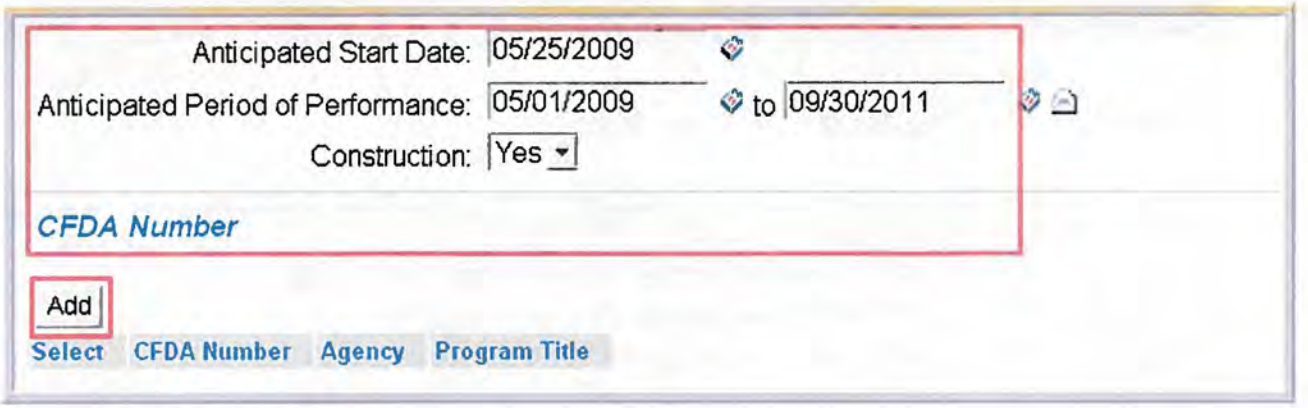


Figure 6: Main / General Screen

Steps	Section	User Action	Guidance
7. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Anticipated Start Date:** Enter or select the Funding Opportunity Start Date. — R **Anticipated Period of Performance:** Enter or select the beginning and ending dates for the Period of Performance associated with your Funding Opportunity. — R **Construction:** Select "Yes" if your Funding Opportunity is for a construction project. Select "No" if your Funding Opportunity is not for a construction project. — R **CFDA No.:** Assign a Catalog of Federal Domestic Assistance (CFDA) number. — R	
8.	Main / General	Click the **Add** button below the **CFDA Number**.	

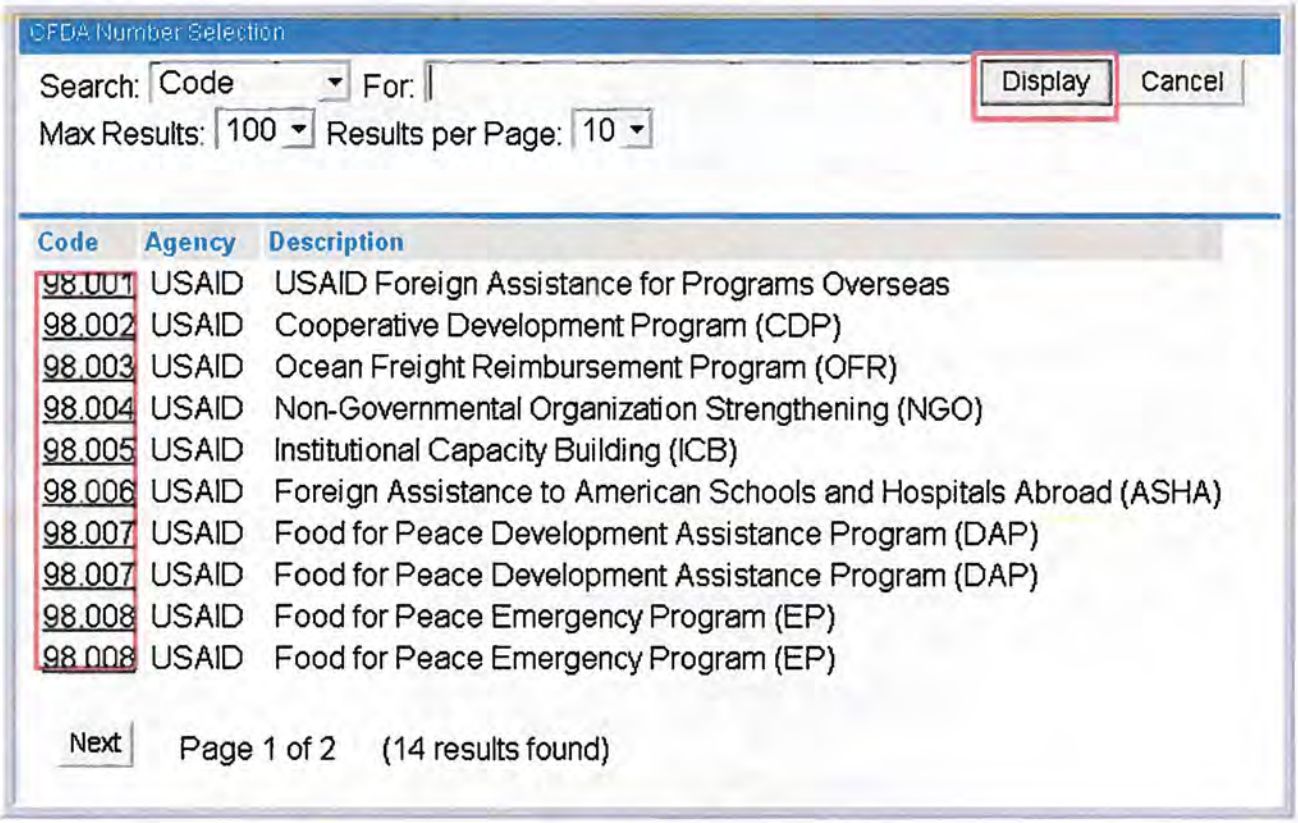


Figure 7: CFDA Number Screen

Steps	Section	User Action	Guidance
9.	CFDA Number Selection	Search for the appropriate CFDA Number. Click the **Display** button. Click the link to select the correct CFDA Number under **Code.**	
10.	Main / General	Click the **Contacts** link on the left-hand menu (not shown).	

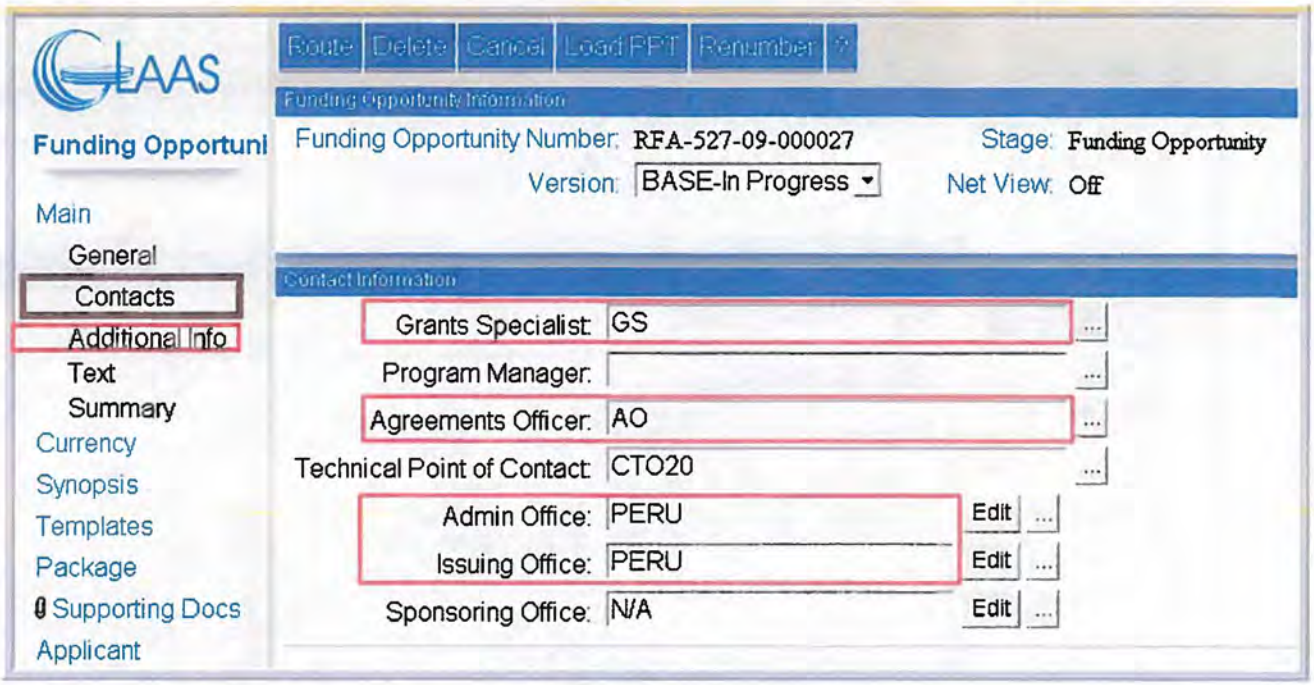


Figure 8: Main / Contacts Screen

Steps	Section	User Action	Guidance
11.	Main / Contacts	Complete the following Required (R) and/or Optional (O) fields: **Grants Specialist:** Enter the name of the Grants Specialist. — R **Agreements Officer:** Enter the name of the Agreements Officer assigned to approve this document. — R **Technical POC:** Select a name of Technical Point of Contact. — O **Admin Office:** Verify the code that represents the AOTR's office. — R **Issuing Office:** Verify the code which represents the contracting office. — R **Sponsoring Office:** Select "N/A." — R	The **Program Manager** field can be left blank.
12.	Main / Contacts	Click the **Additional Info** link on the left-hand menu.	

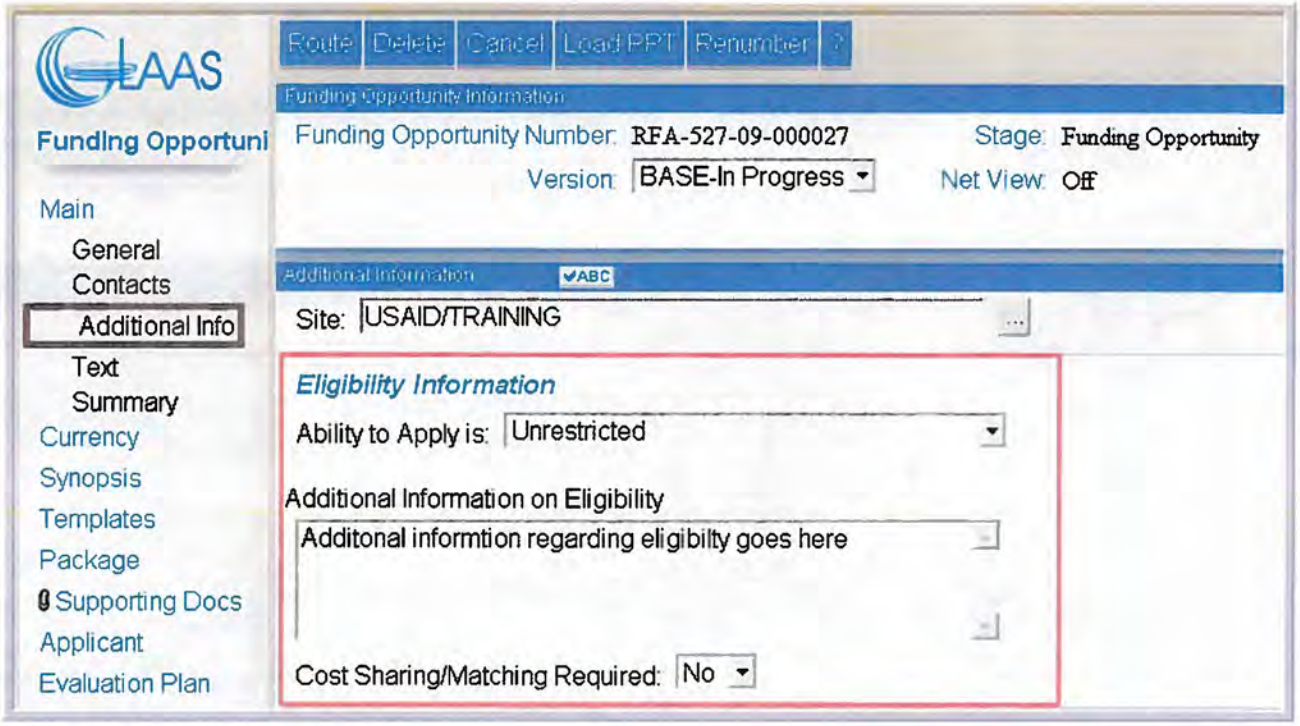


Figure 9: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		
		Ability to Apply is: Select "Restricted" or "Unrestricted," as applicable.	R	
		Eligible Applicants: If "Restricted" is selected above, select one or more **Government Codes** and/or **Non-Government Organizations** (not shown).	R/O	
		Additional Information on Eligibility: Enter additional information to explain recipient qualifications.	R/O	
		Cost Sharing/Matching Required: Select "Yes" if grants awarded under this program require funds from other sources. Select "No" if your Funding Opportunity can proceed without cost sharing or cost matching.	R	

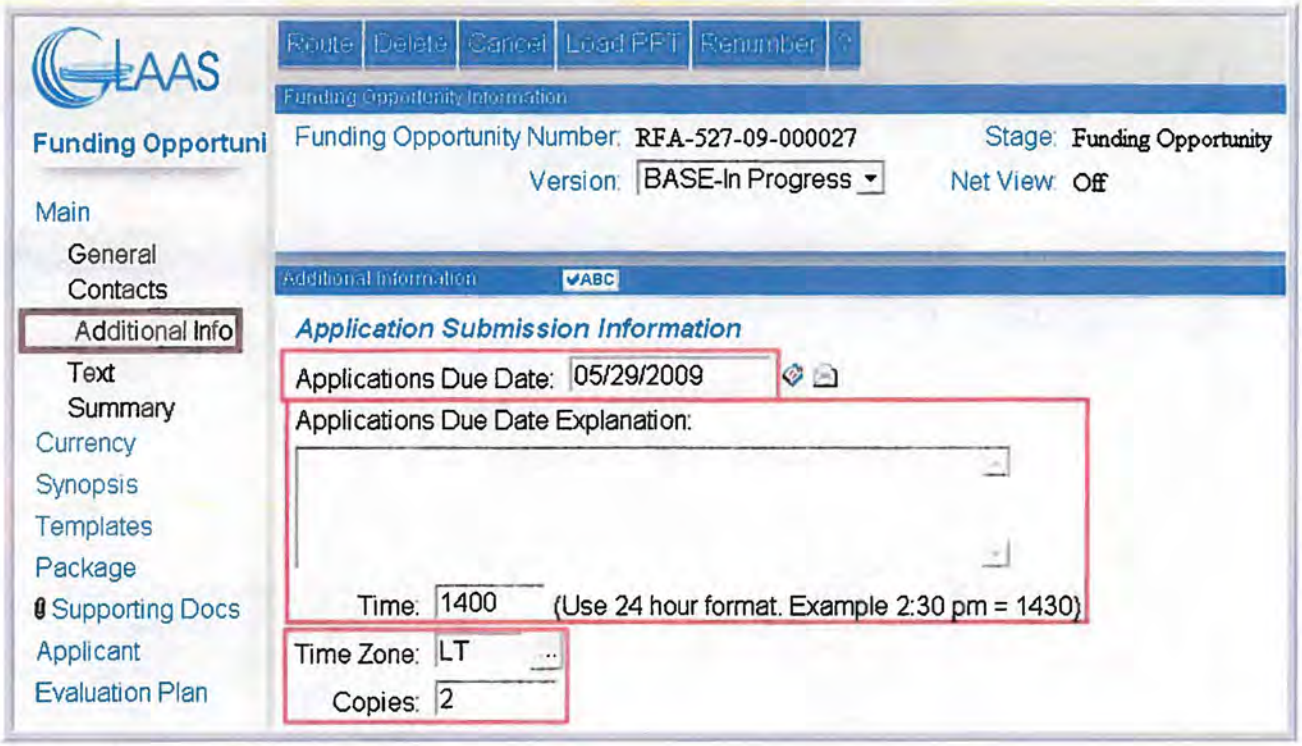


Figure 10: Main Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Applications Due Date:** Choose a deadline by which applicants must submit their responses. — R **Applications Due Date Explanation:** Enter any additional information regarding the due date or to provide an explanation, if you do not specify a due date. Type the text exactly as you want it to display in the synopsis on the Grants.gov web site. — R/O **Time:** Enter time in a 24 hour format (2:30 pm = 1430). — R/O **Time Zone:** Enter or select the time zone of the time of due date. — R **Copies:** Enter the number of copies the applicant must submit when they apply for the Funding Opportunity. — R	For **Time Zone**, enter or select "LT" to indicate Local Time.

Figure 11: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Funding Instrument Type:** Select the appropriate Funding Instrument Type. — R **Funding Activity Category:** Select the appropriate activity categories for this Funding Opportunity. — R	If **Cooperative Agreement** is chosen as a Funding Instrument Type, then a description of substantial involvement must be entered. If **Other** is selected as a Funding Activity Category, please enter an explanation in the field that displays.

GDA Flag	NO	
Place of Performance	527	Republic of Peru
Authorized Geographical Code	000	United States of America
Subcontract/Subgrant Plan Required	NO	No
Performanced Based Contract/Results Oriented Grant	NO	No
Acctg Period		
Reporting Acctg Period		

Figure 12: Main / Additional Info Screen

Steps	Section	User Action		Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.
		GDA Flag: Select "YES" if this action is for a Global Development Alliance initiative.	R	
		Place of Performance: Select a three-digit code indicating the country where the work will be performed.	R	
		Authorized Geographical Code: Select the three-digit code indicating the country that is authorizing the work to be done.	R	
		Subcontract/Subgrant Plan Required: Select "YES" if a sub-grant plan is required.	R	
		Performance Based Contract/Results Oriented Grant: Select "YES" if this will be a results-oriented award.	R	
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	

Action Type	GR1	Grant (Competitive)
Award TEC	4000000	
AIDAR Agency Exemptions to Competition	0	Not Applicable
Competition (Yes/No)	YES	YES
Earmark/Directive/Other	DIRECTIVE	Directive
Earmark/Directive/Other Description	Disaster Relief	

Figure 13: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and as needed, Optional (O) fields: **Action Type:** Select a code identifying the type of acquisition or assistance action. — R **Action TEC:** The total estimated cost of the award is copied forward from the Requisition. If the award is to be incrementally funded, this amount will be greater than the committed amount. — R **AIDAR/Agency Exemptions to Competition**: Select a code to identify the type of exemption. — R **Competition (Yes/No):** Enter "YES" or "NO" if this action will be competed or not. — R **Earmark/Directive/Other:** Select a value to indicate if this award action is based on a Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — R	
14.	Main / Additional Info	Click the **Text** link on the left-hand menu (not shown).	

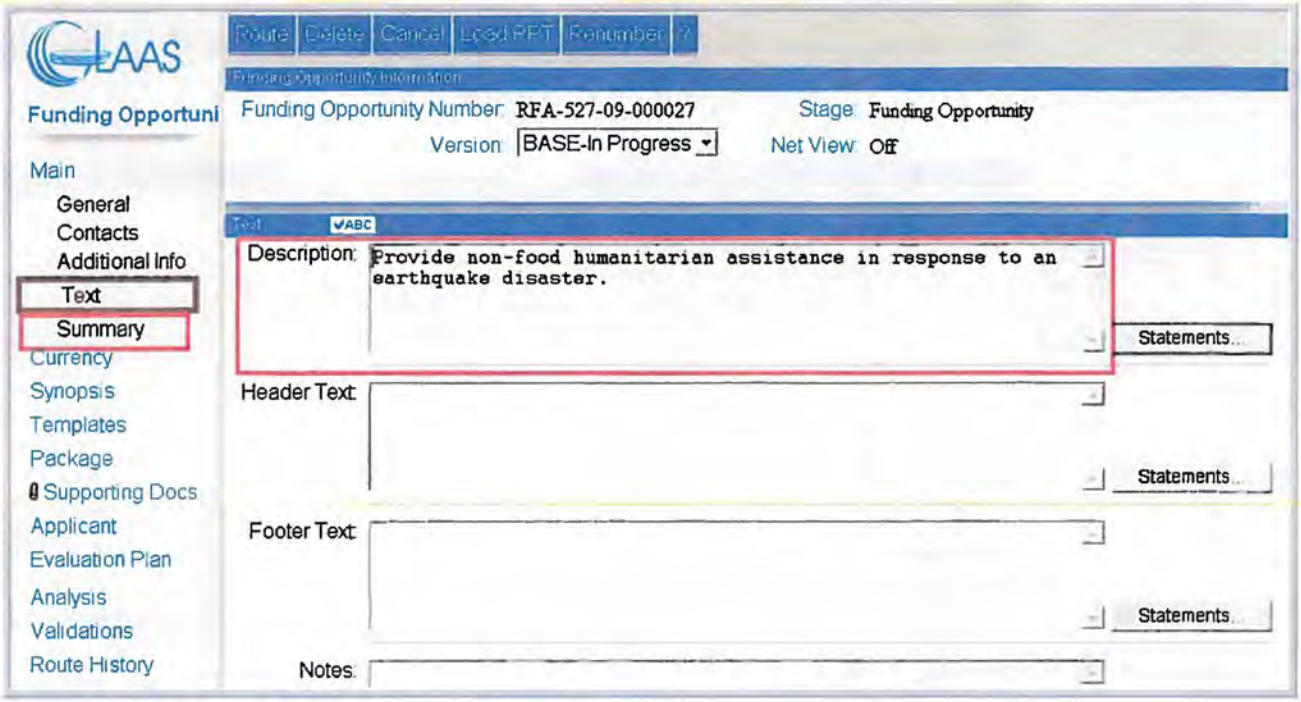


Figure 14: Main / Text Screen

Steps	Section	User Action	Guidance
15.	Main / Text	Complete the following Required (R) and as needed, Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be advertised with this Funding Opportunity. It will carry over to the Award. — R **Header Text:** Enter header text or click the **Statements** button to the right of the field and select header text. — O **Footer Text:** Enter footer text or click the **Statements** button to the right of the field and select footer text. — O **Notes:** Enter notes or click the **Statements** button to the right of the field and select notes. — O	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Each field will hold up to seven typed pages. The **Statements** button contains standard language and can be edited once loaded in the field.
16.	Main / Additional Info	Click the **Summary** link on the left-hand menu.	

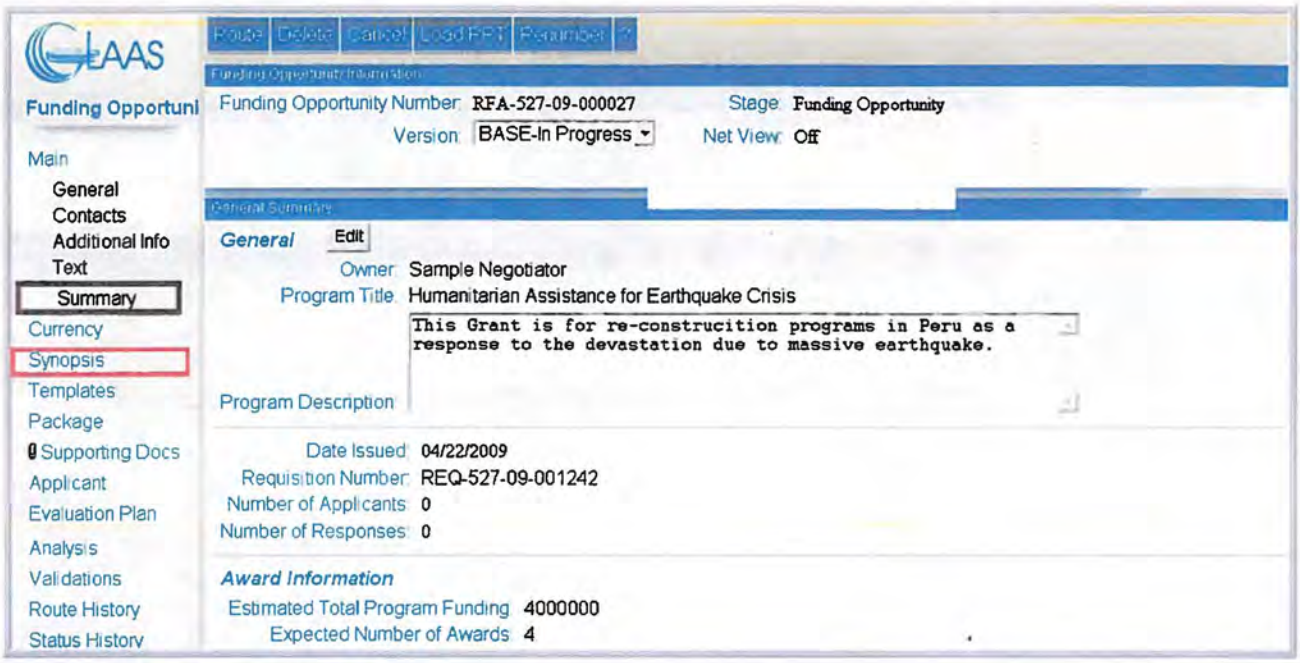


Figure 15: Main / Summary Screen

Steps	Section	User Action	Guidance
17.	Main / Summary	Review the screen to verify that all information is accurate.	The **Summary** screen displays information that has been entered thus far. You can click the various **Edit** buttons (Edit) on this screen if something needs to be changed.
18.	Main / Summary	Click the **Synopsis** link on the left-hand menu.	

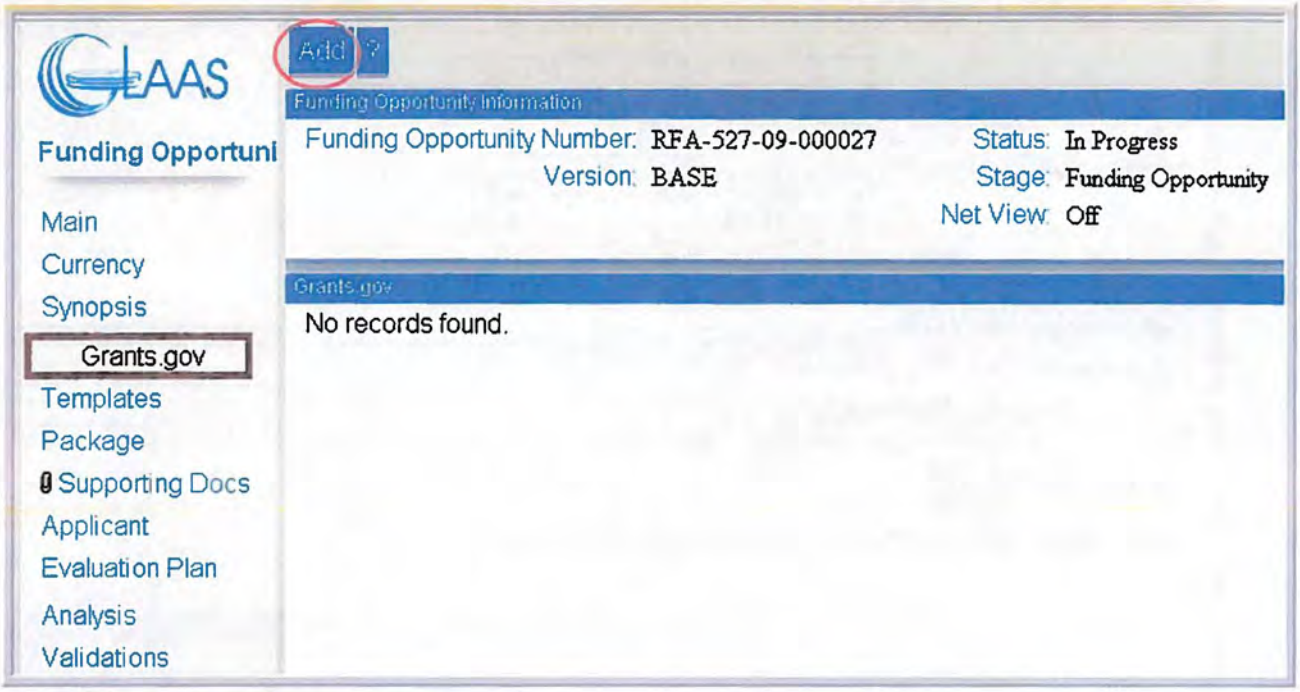


Figure 16: Synopsis / Grants.gov Screen

Steps	Section	User Action	Guidance
19.	Synopsis / Grants.gov	Click the **Add** toolbar button.	

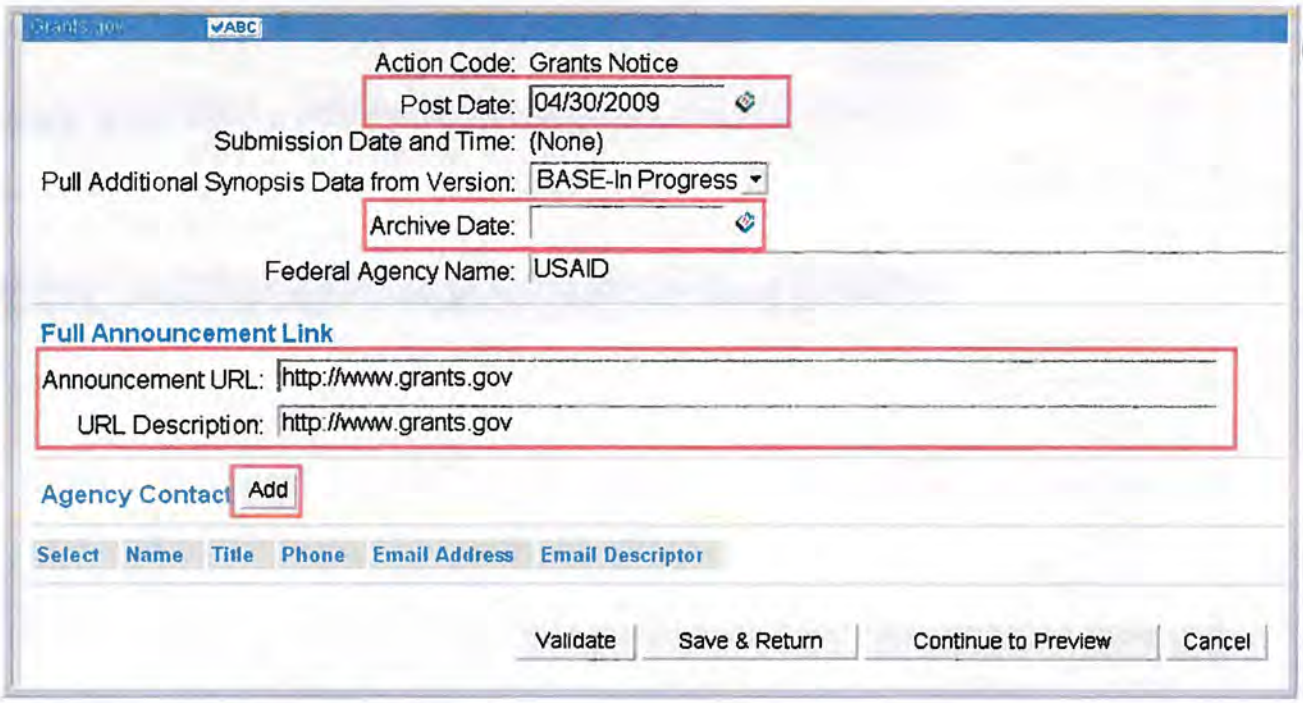


Figure 17: Synopsis / Grants.gov Screen

Steps	Section	User Action	Guidance
20.	Synopsis / Grants.gov	Complete the following Required (R) and/or Optional (O) fields: **Post Date:** Enter the date the Funding Opportunity would be posted on Grants.gov. — R **Archive Date:** Enter the date to be archived. — R/O **Announcement URL:** Enter the URL for Grants.gov. — R	**Archive Date** is only required when the **Applications Due Date** is not provided on the **Main / Additional Info** screen. Any **Announcement URL** web address must begin with "http://." The **URL Description** automatically populates when the **Announcement URL** is typed in. You may modify this field.
21.	Synopsis / Grants.gov	Click the **Add** button next to Agency Contact.	**Agency Contact** information should be populated.

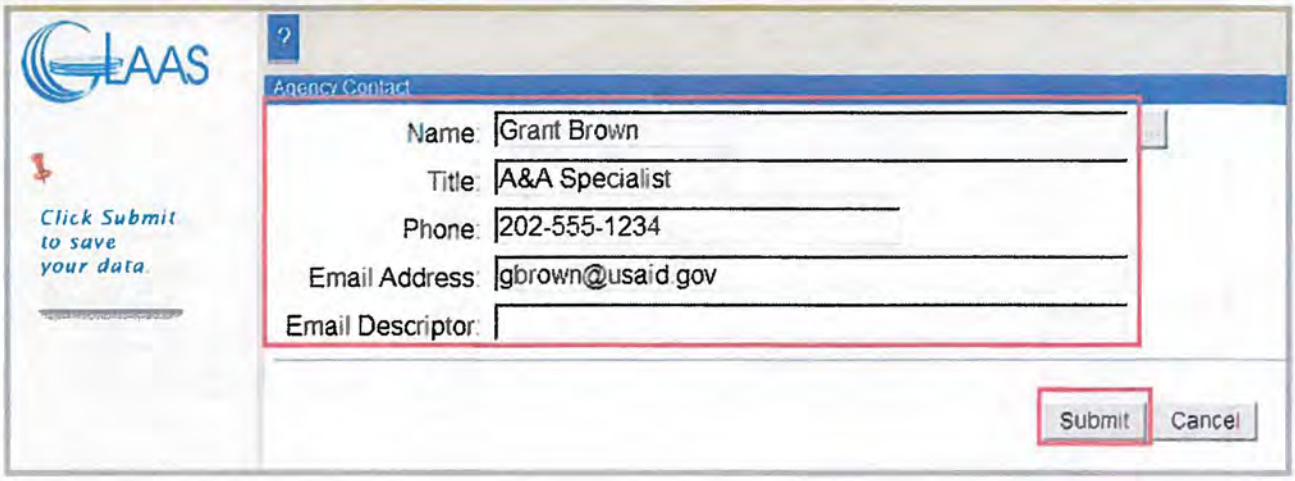


Figure 18: Agency Contact Screen

Steps	Section	User Action	Guidance
22.	Agency Contact	Complete the following Required (R) and/or Optional (O) fields: **Name:** Enter the Agency contact name. — R **Title:** Enter the Agency contact title. — R/O **Phone:** Enter the Agency contact's phone number. — R/O **Email Address:** Enter the Agency contact's email address. — R/O **Email Descriptor:** Enter a brief description of the Agency contact's email address. — O	
23.	Agency Contact	Click the **Submit** button.	

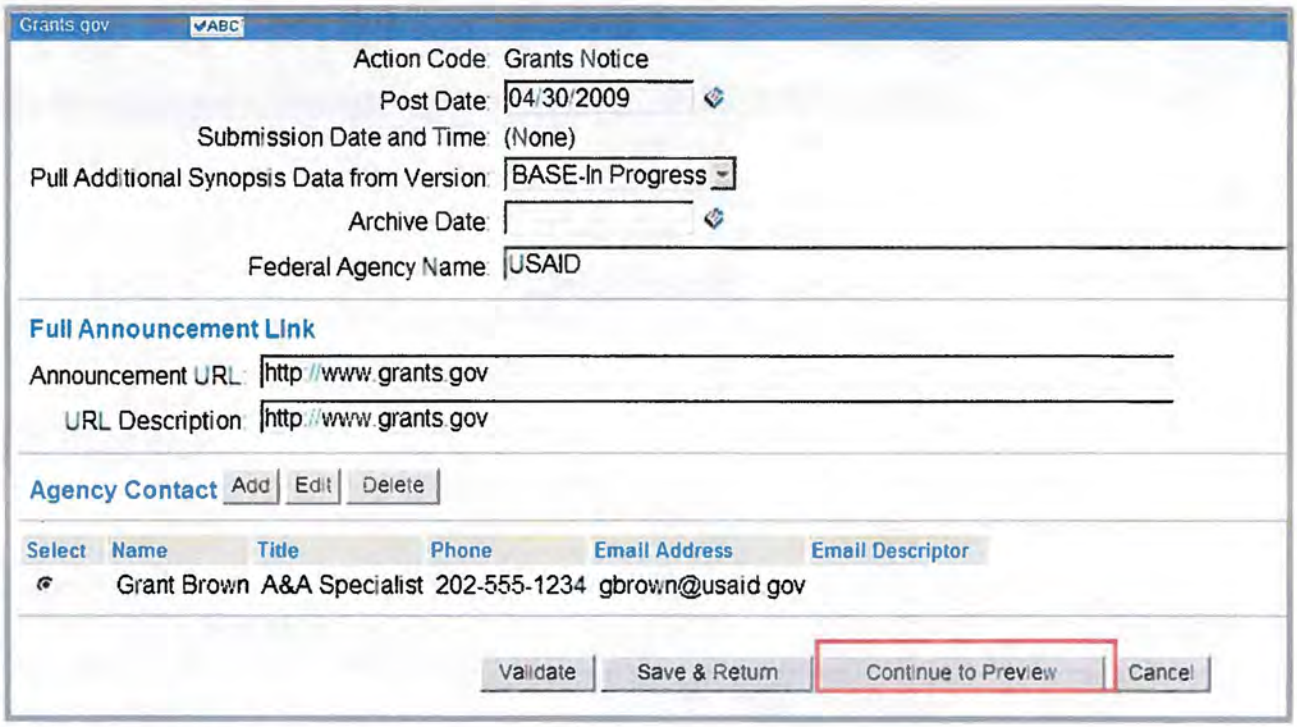


Figure 19: Synopsis / Grants.gov Screen

Steps	Section	User Action	Guidance
24.	Synopsis/ Grants.gov	Click the **Continue to Preview** button.	

Grants.gov

Submission Date and Time: (None)
Funding Opportunity Number: RFA-OAA-09-000003

Edit

Action Code: Grants Notice
Post Date: 04/30/2009
Archive Date: (None)
Announcement URL: http://www.grants.gov
URL Description: http://www.grants.gov

Agency Contact

Name	Title	Phone	Email Address	Email Descriptor
Grant Brown	A&A Specialist	202-555-1234	gbrown@usaid.gov	

Figure 20: Synopsis / Grants.gov Screen

Steps	Section	User Action	Guidance
25.	Synopsis/ Grants.gov	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your Synopsis thus far. Click the various **Edit** links to make any changes.

Non-Government organizations:

11 - Native American tribal organizations (other than Federally recognized tribal governments)	No	12 - Nonprofits having a 501(c)(3) status with the IRS, other than institutions of higher education
13 - Nonprofits that do not have a 501(c)(3) status with the IRS, other than institutions of higher education	No	20 - Private institutions of higher education
21 - Individuals	No	22 - For-profit organizations other than small businesses
23 - Small businesses	No	25 - Others (see text field entitled "Additional Information

Additional Information on Eligibility: Additonal informtion regarding eligibilty goes here

Return to Synopsis List | Return | Continue

Figure 21: Synopsis / Grants.gov Screen

Steps	Section	User Action	Guidance
26.	Synopsis / Grants.gov	Click the **Continue** button. Click the **YES** button to submit the Synopsis (not shown).	

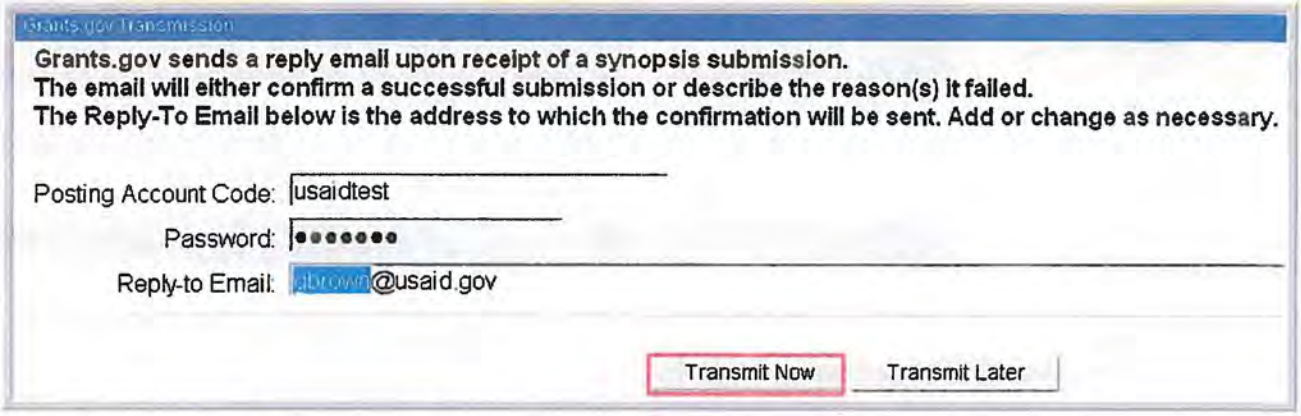


Figure 22: Grants.gov Transmission Screen

Steps	Section	User Action	Guidance
27.	Grants.gov Transmission	Enter the **Posting Account Code** and your **Password**. Enter the **Reply-to Email**. Click the **Transmit Now** button.	The **Posting Account Code** and **Password** should auto-populate. The **Reply-to Email** may auto-populate; if not, enter the appropriate email address. You must have a Grants.gov user ID and password in order to post a Synopsis to Grants.gov directly from GLAAS.
28.	Synopsis	Click the **Package** link on the left-hand menu (not shown).	

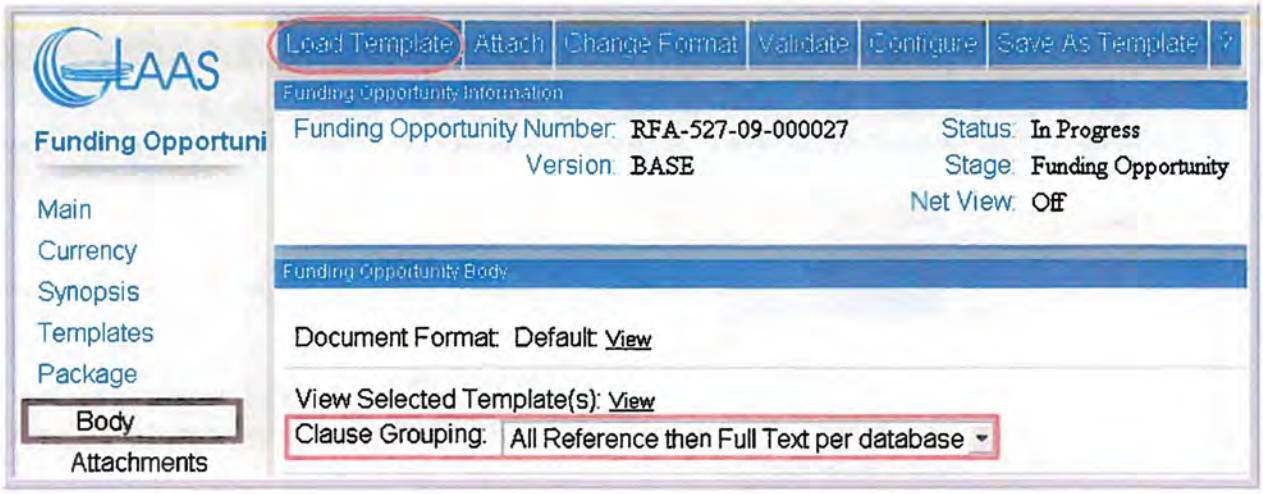


Figure 23: Package / Body Screen

Steps	Section	User Action	Guidance
29.	Package / Body	Select "All Reference then Full Text per database" from the **Clause Grouping** dropdown list. Click the **Load Template** toolbar button.	The *Working with Clauses* user guide explains how to work with GLAAS Clause Templates in more detail.

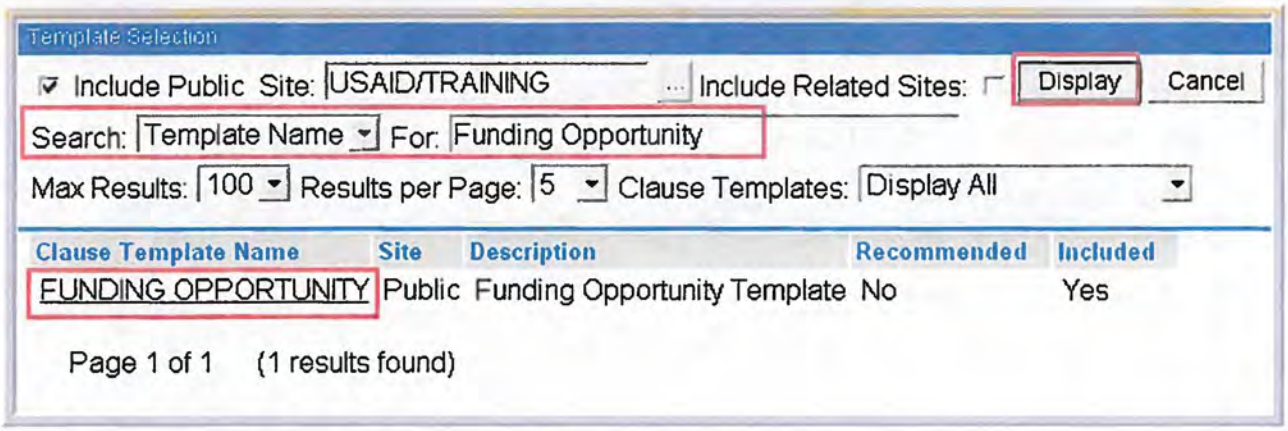


Figure 24: Template Selection Screen

Steps	Section	User Action	Guidance
30.	Template Selection	Search for the appropriate **Template Name**. Click the **Display button.** Click the **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	

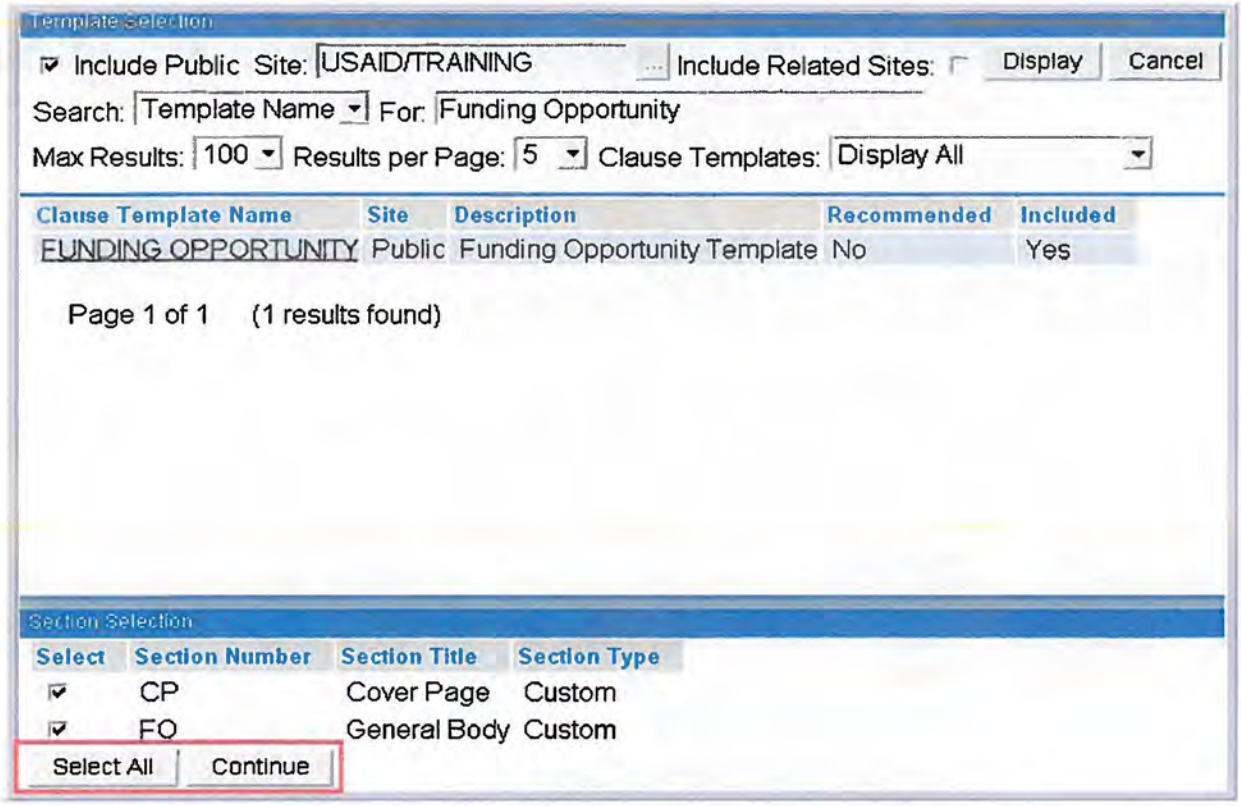


Figure 25: Template Selection Screen

Steps	Section	User Action	Guidance
31.	Template Selection	Click the **Select All** button to include all of the clauses in your Funding Opportunity. OR Check or uncheck the boxes to select clause sections one at a time.	GLAAS displays the clause sections that will be included in the Award from the Clause Template.
32.	Template Selection	Click the **Continue** button.	

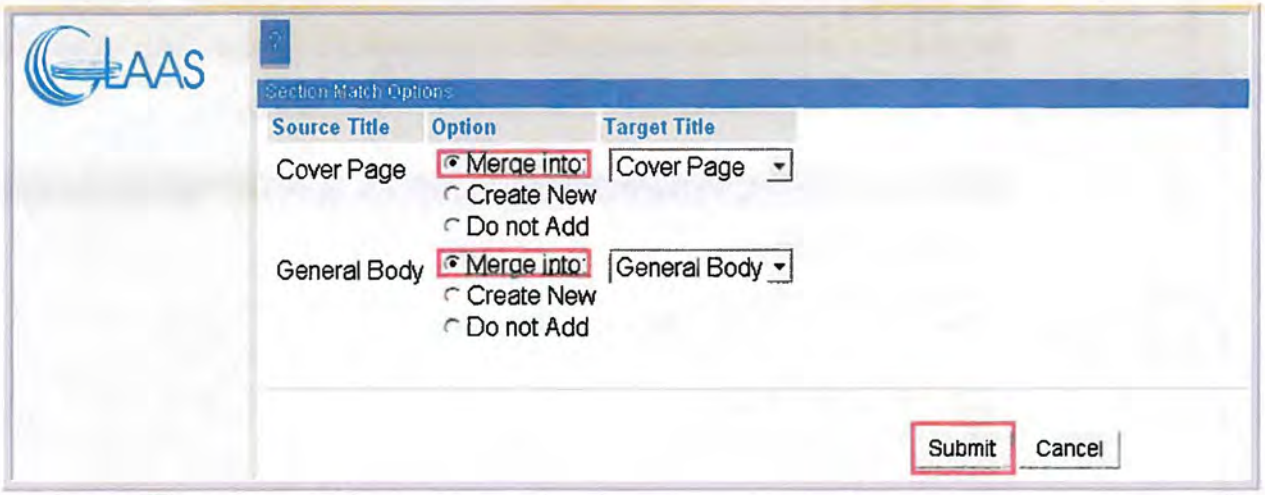


Figure 26: Section Match Options Screen

Steps	Section	User Action	Guidance
33.	Section Match Options	Confirm that the **Option** fields are set to **Merge into** and then click the **Submit** button.	

Figure 27: Package / Body Screen

Steps	Section	User Action	Guidance
34.	Package / Body	Click the **Generate** toolbar button.	GLAAS generates a modifiable Rich Text Format (.rtf) document that includes all of the clauses for your Funding Opportunity (not shown).
35.	Package / Body	Modify the Funding Opportunity document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Checking documents in and out of GLAAS prevents multiple people from editing the same document at the same time. When checking a document back in, the file name must be the same as when it was checked out. You can click the ".rtf" link under **File Name** to view the Funding Opportunity document, but any changes you make will not be saved in GLAAS. You must **Check Out** and **Check In** to make edits to the document. The *Working with Clauses* user guide shows you how to **Check Out** and **Check In** documents.
36.	Package / Body	Click the **Attachments** link on the left-hand menu.	

Figure 28: Package / Attachments Screen

Steps	Section	User Action	Guidance
37.	Package / Attachments	Click the **Add** or **Library** toolbar button to add an attachment to the Funding Opportunity package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any attachments from the Requisition will be pulled into the Funding Opportunity. The **Attachments** screen contains documents for external use that may be sent to the applicant. Example: "Statement of Work." When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Any attachments from the Requisition will be pulled into the Award. Once a document is added here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
38.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	

Figure 29: Supporting Documents Screen

Steps	Section	User Action	Guidance
39.	Package / Supporting Docs	Click the **Add File** or **Library** toolbar button to add a supporting document to the Funding Opportunity package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	Any supporting documents from the Requisition will be pulled into the Funding Opportunity. The **Supporting Docs** screen contains documents for internal use that will not be sent to the applicant. For example, the TEC Memo documenting the recommendation of the Evaluation Committee. When checking a document back in, the file name must be the same as when it was checked out. The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. To allow only users with "Full Access" to view supporting documents, click the **Detail** toolbar button and then check the **Confidential** box (not shown). Once a document is added here, you can use the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments**.
40.	Package / Supporting Docs	Click the **Applicant** link on the left-hand menu.	

Figure 30: Applicant / Applicants List Screen

Steps	Section	User Action	Guidance
41.	Applicant / Applicants List	Click the **Add Applicant (Select Type)** toolbar button. Select "Add Permanent" from the dropdown list (not shown).	"Add Permanent" refers to applicants that already exist in the financial system, Phoenix, and can be used on Awards. "Add Temporary" refers to applicants in GLAAS that must also be created in Phoenix before they can be used on awards. "Add Suggested" refers to vendors that come over from a Requisition and can be either permanent or temporary vendors.

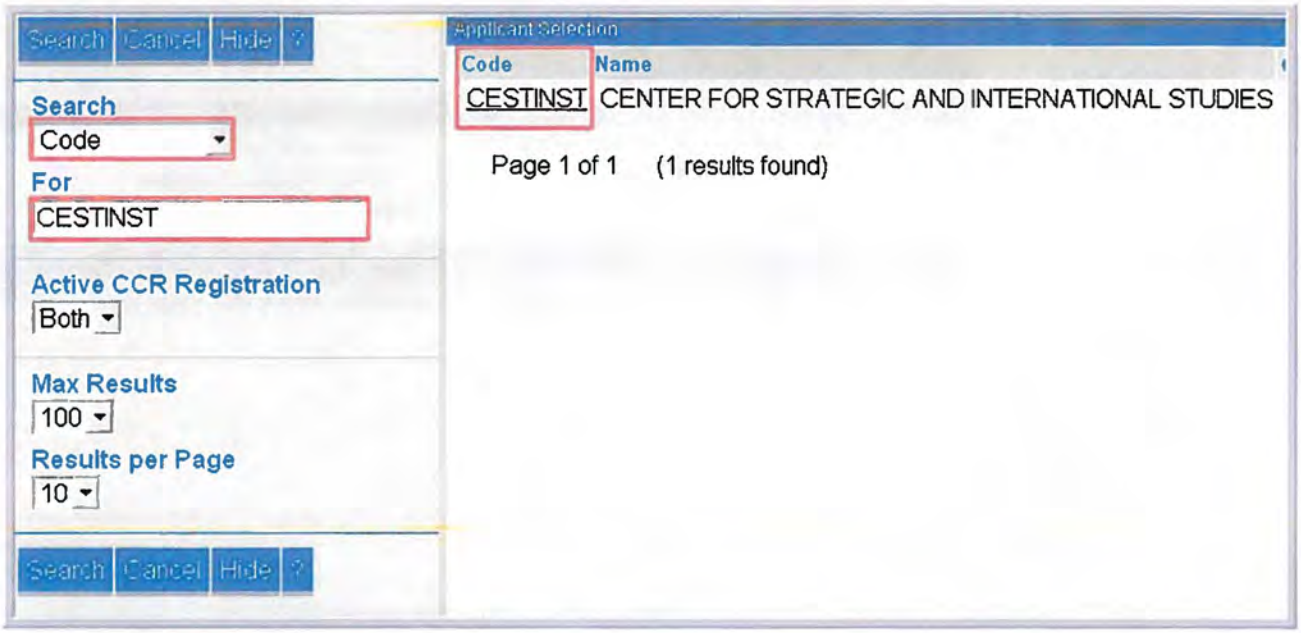


Figure 31: Applicant Selection Screen

Steps	Section	User Action	Guidance
42.	Applicant Selection Screen	Search for the Applicant from the **Applicant Selection** screen. Click the Applicant **Code** link.	

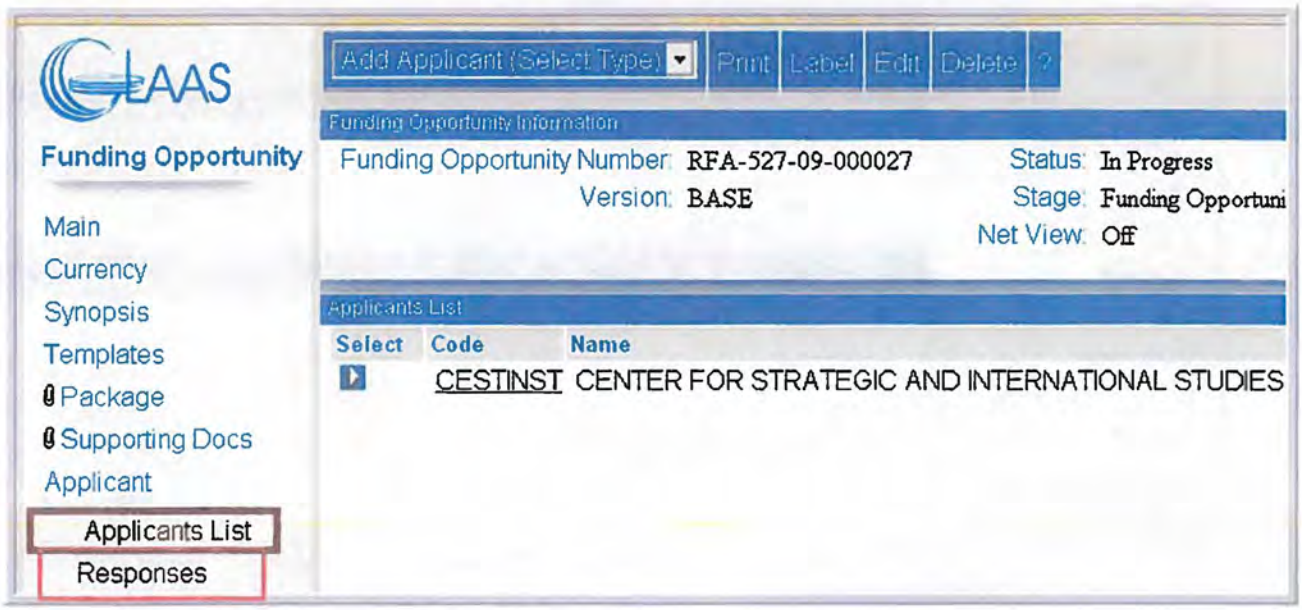


Figure 32: Applicant / Applicants List Screen

Steps	Section	User Action	Guidance
43.	Applicant / Applicants List	Click the **Responses** link on the left-hand menu.	GLAAS will periodically download any responses that applicants have submitted through Grants.gov.

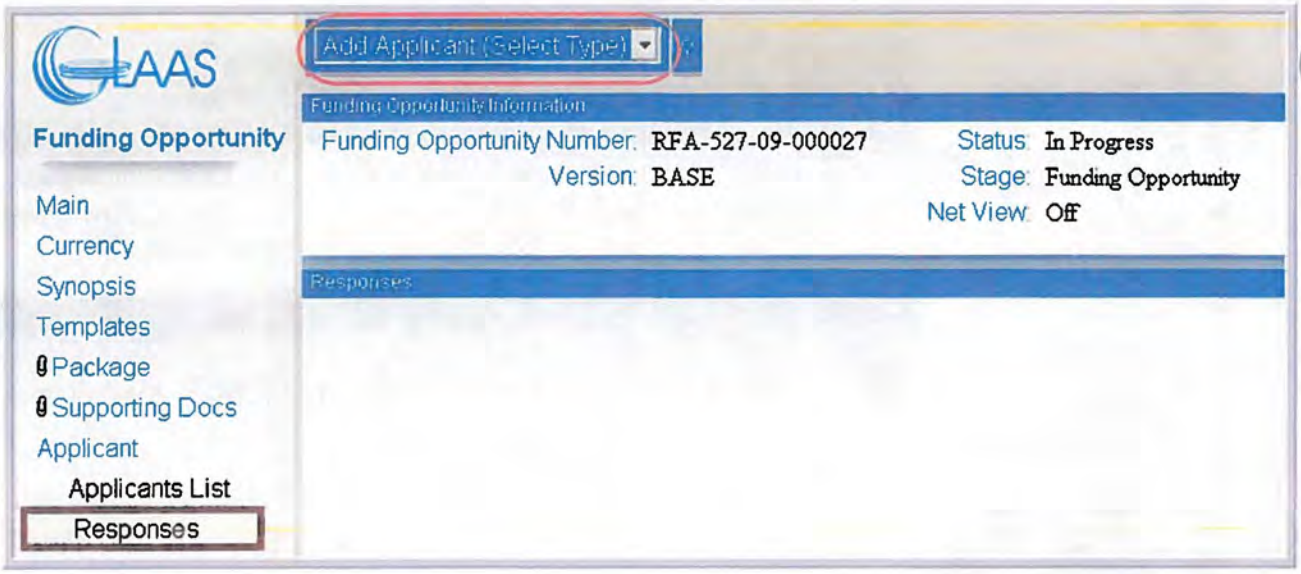


Figure 33: Applicant / Responses Screen

Steps	Section	User Action	Guidance
44.	Applicant / Responses	Click the **Add Applicant (Select Type)** toolbar button. Select "Add Permanent" from the dropdown list (not shown).	

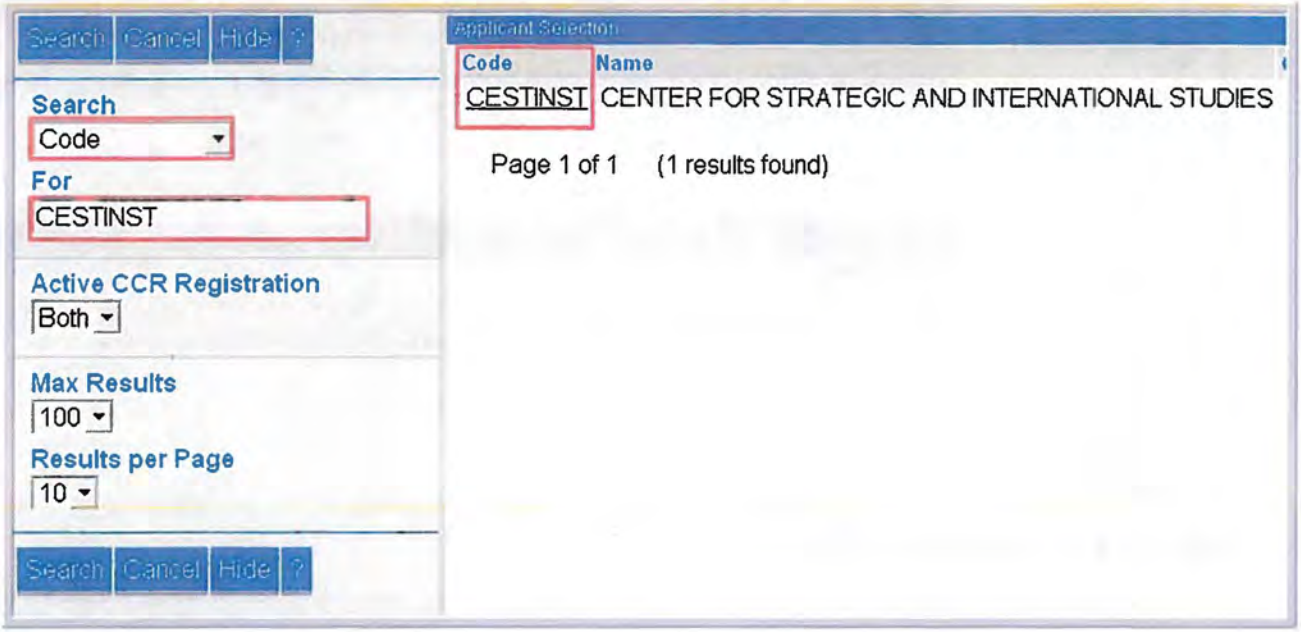


Figure 34: Applicant Selection Screen

Steps	Section	User Action	Guidance
45.	Applicant Selection Screen	Search for the Applicant from the **Applicant Selection** screen. Click the Applicant **Code** link.	

Figure 35: Applicant / Responses Screen

Steps	Section	User Action	Guidance
46.	Applicant / Responses	Click the **Validations** link on the left-hand menu (not shown).	Use the appropriate toolbar button to **Eliminate** or **Un-eliminate** Applicant Responses from this list (not shown).

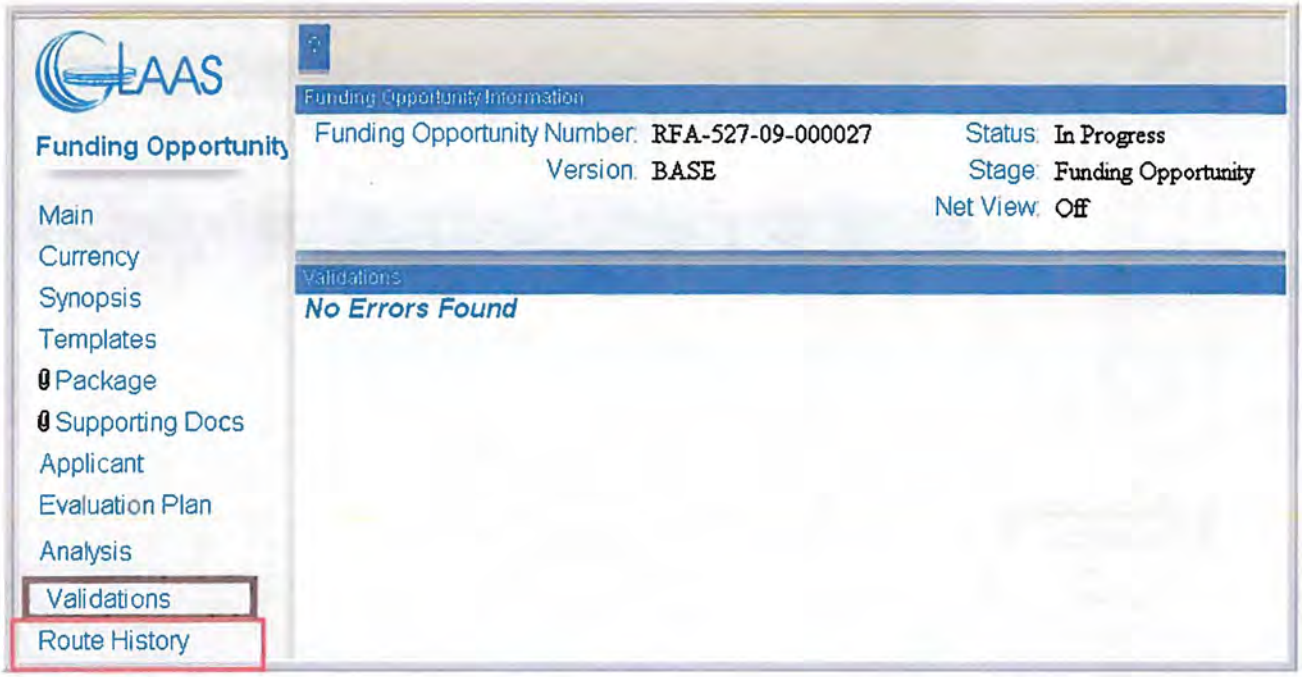


Figure 36: Validations Screen

Steps	Section	User Action	Guidance
47.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Funding Opportunity (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
48.	Validations	Click the **Route History** link on the left-hand menu.	

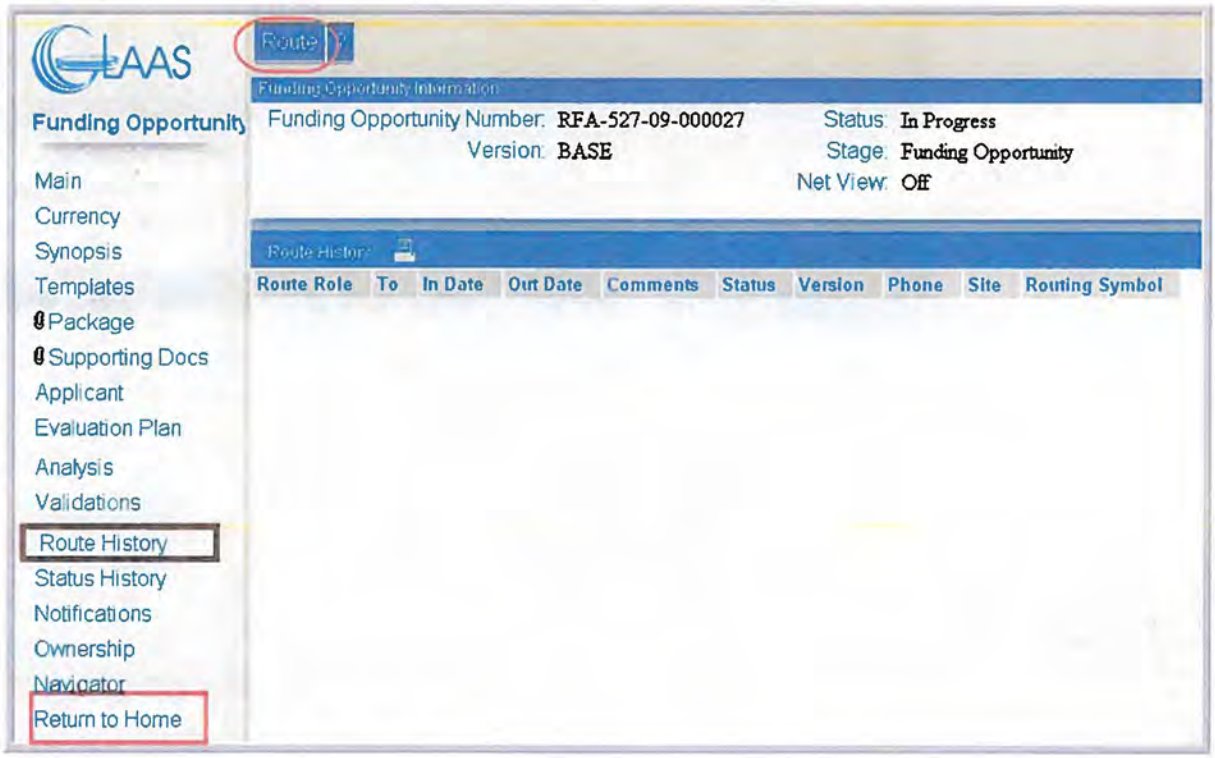


Figure 37: Route History Screen

Steps	Section	User Action	Guidance
49.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for **Approval** to the Agreements Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
50.	Route History	Click the **Return To Home** link on the left-hand menu.	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Creating an Assistance Award

December 2009

Creating an Assistance Award Objectives

- At the end of this topic, you will know how to:
  - Create an Assistance Award from a Requisition
  - Generate a cover letter and standard provisions
  - Create the FAADS Report
  - Route the Assistance Award for review

Creating an Assistance Award Process

1. An APP is created to plan the procurement
2. The Requisition is created from the APP
3. The Requisition is released and funds are committed in Phoenix
4. The Milestone Plan is created and linked to a Requisition
5. The Funding Opportunity is created from the Requisition
6. The Assistance Award is created from the Requisition

Creating an Assistance Award Roles & Responsibilities

- The A&A Specialist –
  - Creates an Assistance Award from a Requisition
  - Generates the Award package
  - Posts the Funding Opportunity to Grants.gov after AO approval
  - Creates the FAADS Report
- The Agreement Officer –
  - Reviews and approves the Funding Opportunity
  - Reviews and approves the Assistance Award to initiate the obligation in Phoenix

GLAAS 102 USER GUIDE:

CREATING AN ASSISTANCE AWARD

PURPOSE:

This user guide will show you how to create an Assistance Award in GLAAS, which includes all types of grants and cooperative agreements.

BEFORE STARTING:

1. In order to create the Assistance Award, you must be an A&A Specialist or an Agreement Officer.
2. In order to approve an Assistance Award, you must be an Agreement Officer, Assistant Administrator or Mission Director.
3. A Requisition has been created, approved and released.
4. A Milestone Plan has been created and linked to the Requisition.

STEPS:

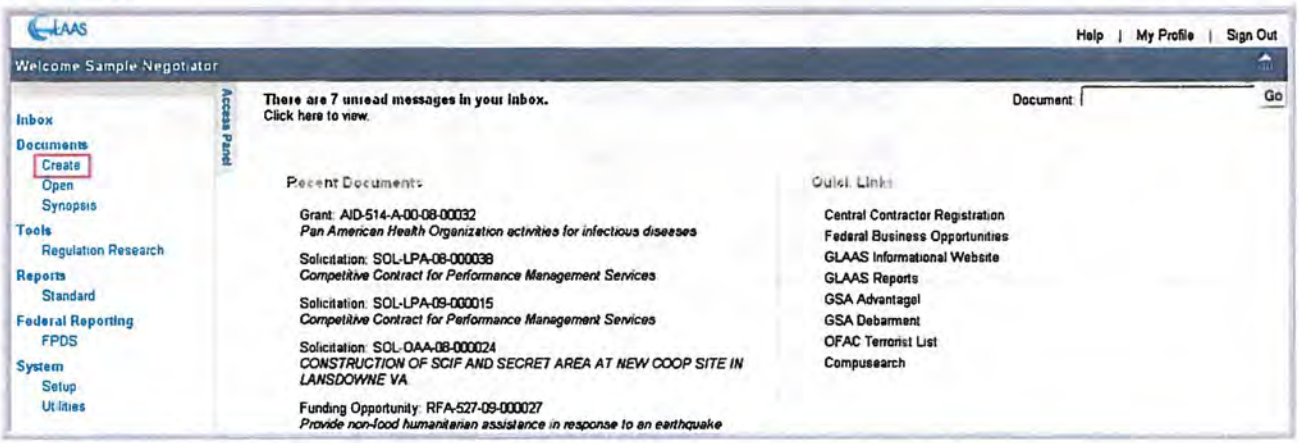


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

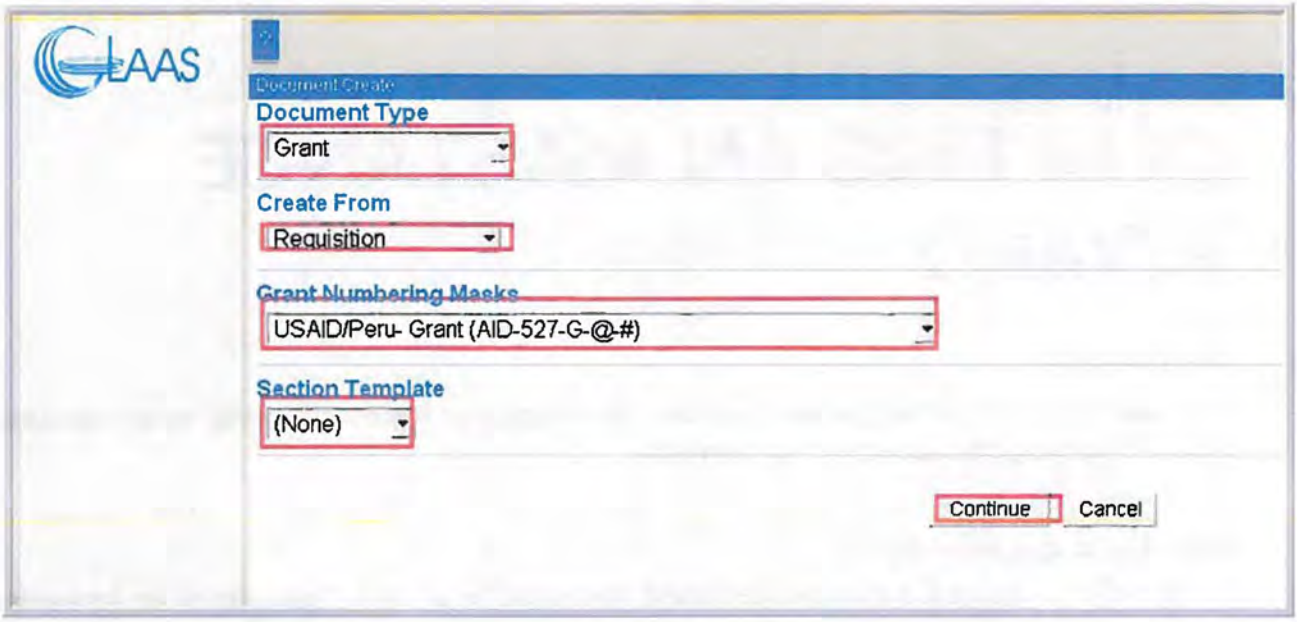


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Grant." • **Create From:** Select "Requisition." • **Grant Numbering Masks:** Select a numbering mask. • **Section Template:** Select "(None)." Click the **Continue** button.	GLAAS uses different instrument codes for different types of Assistance Awards: • "A" = Cooperative Agreement • "G" = Grant • "LA" = Associate Award • "L" = Leader Award

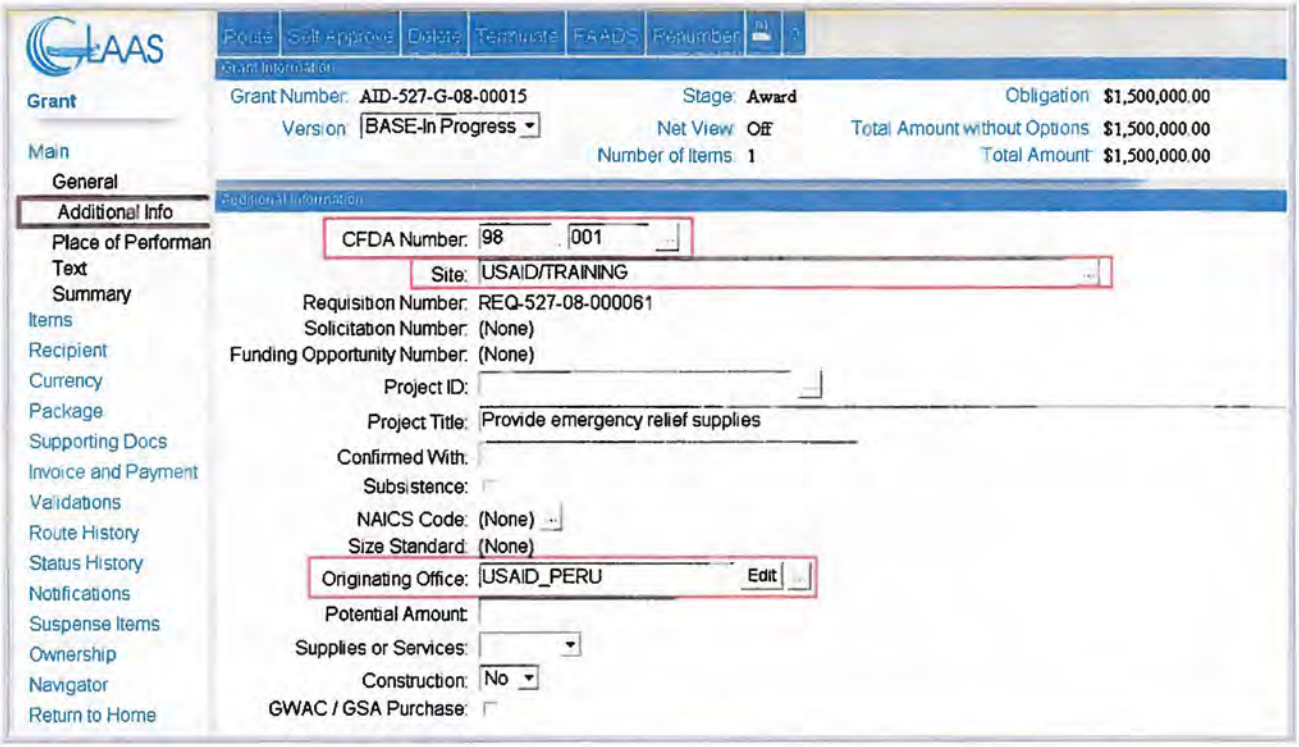


Figure 7: Main / Additional Info Screen

Steps	Section	User Action	Guidance
9.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **CFDA Number:** Enter or select the Catalog of Federal Domestic Assistance (CFDA) number. — R **Site:** This defaults to the site of the requisition. — R **Project Title:** This populates from the Funding Opportunity. — O **Originating Office:** This defaults to the requesting office. — R **Construction**: Select "Yes" or "No." — O	The CFDA numbers assigned to USAID can be located by searching for all numbers beginning with "98." The following fields are not used on Assistance Awards: • **Project ID** • **Confirmed With** • **Subsistence** • **NAICS Code** • **Size Standard** • **Potential Amount** • **Supplies and Services** • **GWAC/GSA Purchase**

Additional Information

GWAC / GSA Purchase:

Technical Officer

Name:

Mail Stop:

Phone:

Email Address:

Recipient Congressional District No.:

Recipient City Code:

Recipient City Name: (None)

Recipient County Code: (None)

Recipient County Name: (None)

Recipient State Code: (None)

Recipient State Name: (None)

Figure 8: Main / Additional Info Screen

Steps	Section	User Action		Guidance
9. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		A link to the list of U.S. Congressional Districts can be found on the GLAAS **Welcome** screen.
		Technical Officer: Enter the appropriate contact information for the AOTR: • **Name** • **Mail Stop** • **Phone** • **Email Address**	O	
		Recipient Congressional District No.: Enter the appropriate district number.	R	
		Recipient City Code: Select the city code.	R	

Additional Information	
GDA Flag:	NO
Payment method:	LOC
Environmental Determination Document Name:	N/A
Place of Performance:	527
Authorized Geographical Code:	000
22 CFR 216 Compliance Status:	EXEMPT - ODAF
Benefiting Country Code:	527
Subcontract/Subgrant Plan Required:	NO

Figure 9: Main / Additional Info Screen

Steps	Section	User Action		Guidance
9. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.
		GDA Flag: Select "YES" if this action is for a Global Development Alliance initiative.	R	
		Payment Method: Select from the list how the award will be paid.	R	
		Environmental Determination Document Name: Enter a document title (if applicable), otherwise enter "N/A."	R	
		Place of Performance: Select the three-digit code indicating the country where the work will be performed.	R	
		Authorized Geographical Code: Select the three-digit code indicating the country that is authorizing the work to be done.	R	
		22 CFR 216 Compliance Status: Select an environmental compliance status code.	R	
		Benefiting Country Code: Select the code of the country that will benefit from this action.	R	
		SubContract/Subgrant Plan Required: Select "YES" if a Subgrant plan is required.	R	

Additional Information	
Performanced Based Contract/Results Oriented Grant:	NO
Name of Subcontractor/Subgrantee:	
Grants Under Contract/Contracts Under Grant:	
COTR/AOTR Assigned Date:	04/19/2009
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?	YES

Figure 10: Main / Additional Info Screen

Steps	Section	User Action		Guidance
9. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		
		Performance Based Contract /Results Oriented Grant: Select "YES" if this will be a performance-based award.	R	
		Name of Subcontractor/ Subgrantee: Enter the name of the subgrantee if applicable.	O	
		Grants Under Contracts /Contracts Under Grant: Select "YES" if contracts can be issued under this Grant.	O	
		COTR/AOTR Assigned Date: Enter the date that the AOTR was assigned to this award.	R	
		Has the COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties? Select "YES" or "N/A."	R	
		Has a hard copy been placed in the OAA contract award file? Select "YES" or "N/A."	R	

Acctg Period:	
Reporting Acctg Period:	
Action Type:	GR1
Award TEC:	2500000
NMS Award Fee Amount:	
NMS Award Other Amount:	
Award/Order Number:	
AIDAR/Agency Exemptions to Competition:	0
Competition (Yes/No):	YES

Figure 11: Main / Additional Info Screen

Steps	Section	User Action		Guidance
9. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:		**NMS Award Fee Amount** and **NMS Award Other Amount** are populated from NMS on Migrated Awards (not shown).
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Action Type: Select a code identifying the type of award action.	R	
		Award TEC: Enter the Total Estimated Cost of the Award.	R	
		AIDAR/Agency Exemptions to Competition: Select a code to identify the type of exemption, or select "0" if the award is competitive.	R	
		Competition (Yes/No): Select "YES" or "NO" to indicate if this action will be competed or not.	R	

Earmark/Directive/Other:	DIRECTIVE
Earmark/Directive/Other Description:	07 Emergency Relief
Leader Award Number:	0
Letter of Credit Number:	
Requisition Number (for mods only):	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

Figure 12: Main / Additional Info Screen

Steps	Section	User Action	Guidance
9. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Earmark/Directive/Other:** Select a value to indicate if this award action is based on Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — O **Leader Award Number**: If this award is an Associate Award, select its Leader Award number. If it is not an Associate Award, select "0" for not applicable. — R **Letter of Credit (LOC) Number:** Enter the LOC number when the recipient form of payment is by Letter of Credit. — O **Requisition Number (for mods only):** If this is a modification, select the Requisition number. If this is a new award, select "0" for not applicable. — R **Send notification to Requestor(s) of unused funds on the Requisition?:** Select "YES" to send a notification to Requestor(s), advising them of unobligated funds. Select "NO" to not notify the Requestor(s) of unobligated funds. — R	If the **Payment Method** is "Letter of Credit (LOC)," enter the **Letter of Credit Number**.
10.	Main / Additional Info	Click the **Text** link on the left-hand menu (not shown).	

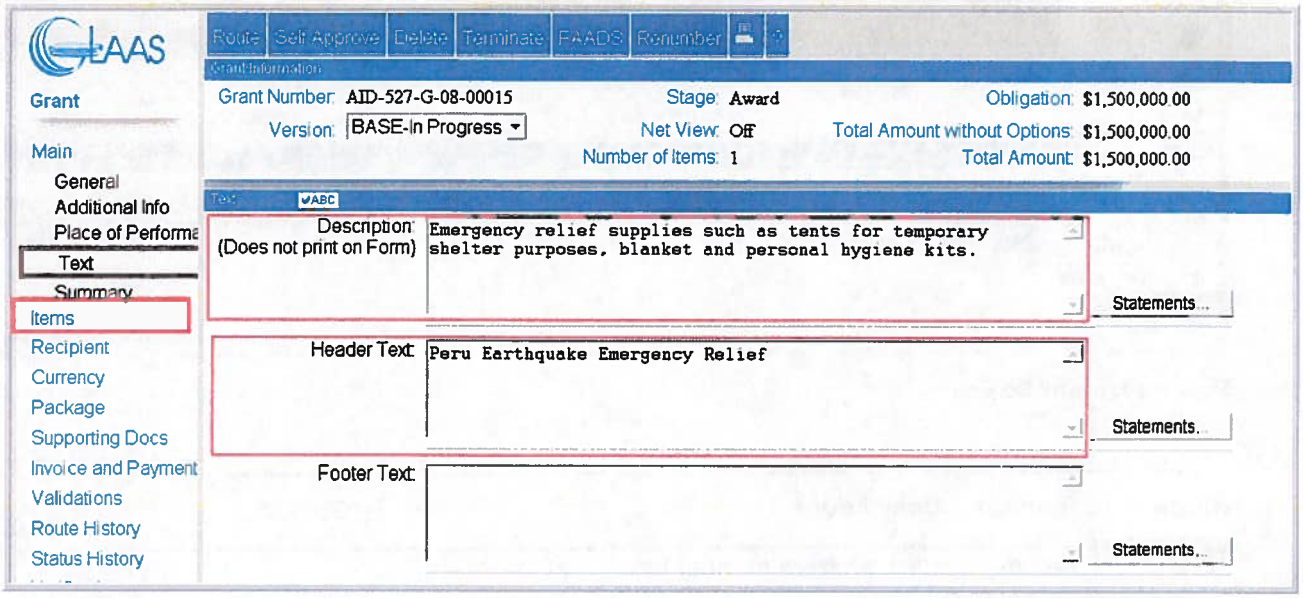


Figure 13: Main / Text Screen

Steps	Section	User Action	Guidance
11.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be purchased with this action. This will not print on the award. — R **Header Text:** Enter a short (50 characters or less) description of the award. This will print out once at the top of the schedule on the award. — R **Footer Text:** Will print once at the bottom of the schedule on the award. — O **Notes:** Enter any additional text for the award (not shown). This will not print on the award. — O	**WARNING!** Do not enter sensitive procurement information in the **Description** field. Each text field will hold up to seven typed pages. The first 255 characters of the **Description** carry over to the Description field in Phoenix. The first 50 characters of the **Header Text** carry over to the Title field in Phoenix. The **Statements** button contains standard language and can be edited once loaded in the field.
12.	Main / Text	Click the **Items** link on the left-hand menu.	

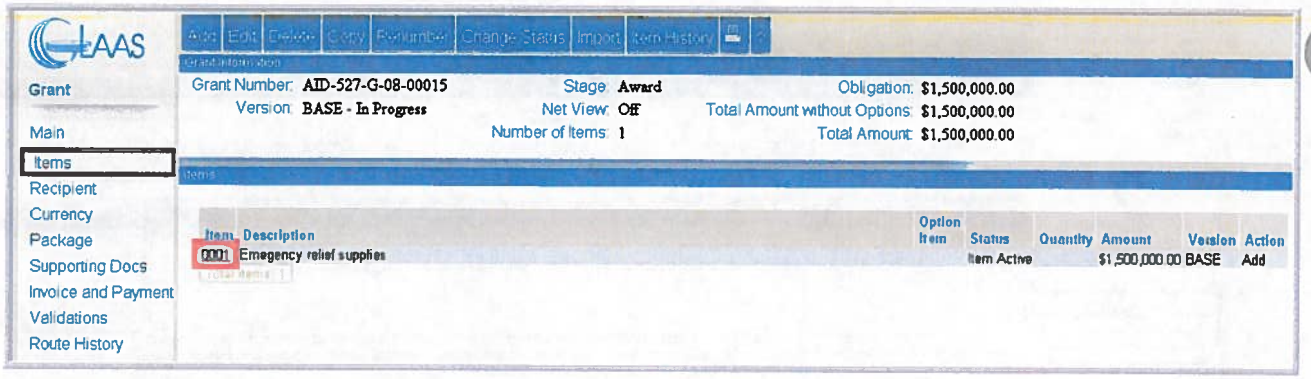


Figure 14: Items Screen

Steps	Section	User Action	Guidance
13.	Items	Click an **Item** number link.	

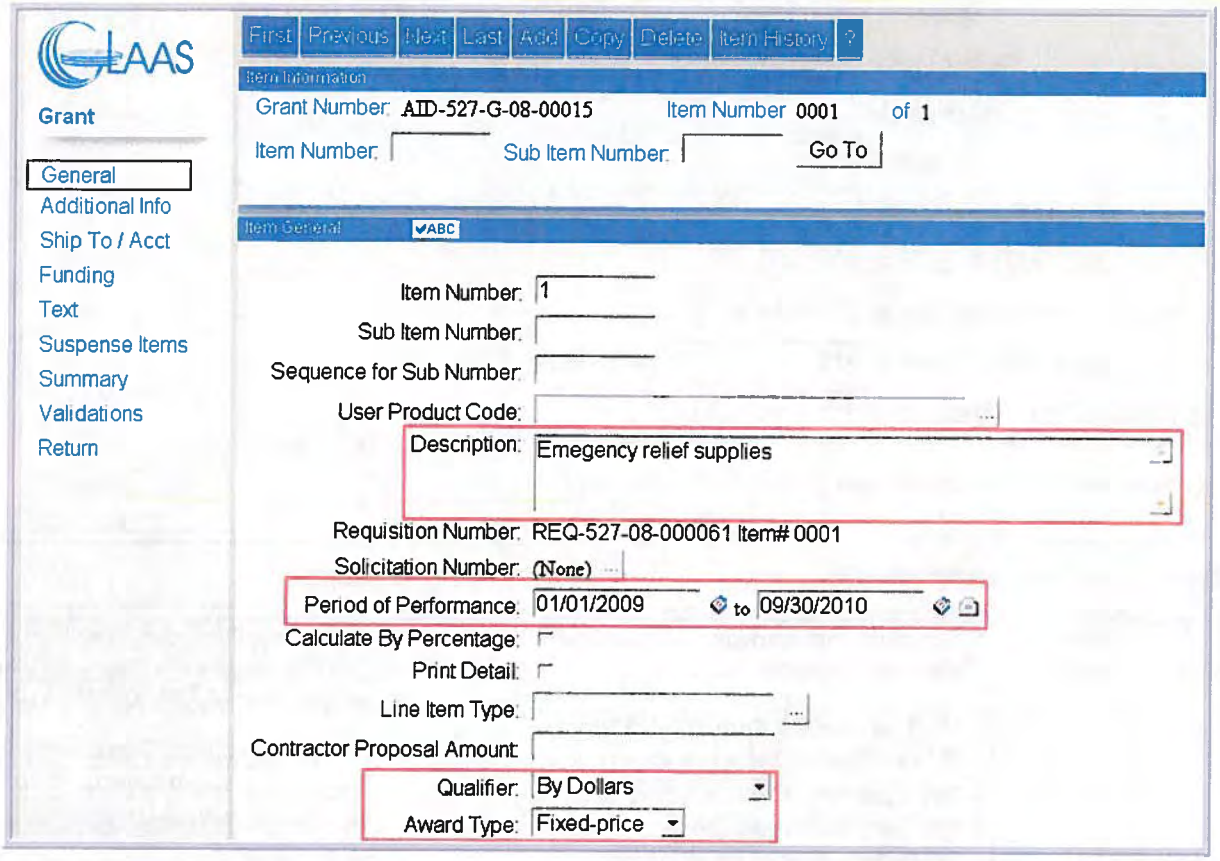


Figure 15: Items / General Screen

Steps	Section	User Action	Guidance
14.	Items / General	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a description for the item. — R **Period of Performance:** Enter the effective and completion dates for the item. — R **Line Item Type:** Select the appropriate type if applicable. — O **Qualifier**: This defaults from the Requisition, usually "By Dollars." — R **Award Type**: Select the appropriate value. — R	The **Contractor Proposal Amount** field is not currently used on Assistance Awards. USAID is not currently using these fields: • **Sub Item Number** • **Sequence for Sub Number** • **User Product Code** • **Calculate By Percent** • **Print Detail**

Qualifier:	By Dollars
Award Type:	Cost-sharing
Unit of Issue:	
Quantity:	
Estimated Unit Cost:	
Total Estimated Cost:	2000000.00
Type of Government Share:	By Percent
Government Share is:	75 percentage of cost
Estimated Government Cost:	1500000.00

Figure 16: Items / General Screen

Steps	Section	User Action	Guidance
14. cont.	Items / General	Complete the following Required (R) or Optional (O) fields: **Unit of Issue / Quantity / Unit Price (Estimated Unit Cost):** If "By Quantity" was selected on the Requisition as the **Qualifier**, these are required fields. — R/O **Amount / Estimated Total Cost / Estimated Government Cost:** The label for this field changes based on the Award Type selected. — R/O	The following fields are required, and will only be displayed, if you select "Cost-Sharing" as the **Award Type**: • **Total Estimated Cost:** Enter the total value of the award, inclusive of the recipient and government share. • **Type of Government Share:** Choose "By Percent" or "By Amount." • **Government Share is:** Enter the percent of the government share, if you chose "By Percent" for **Type of Government Share**. • **Estimated Government Cost:** Enter the amount of the government share (i.e., the amount you wish to obligate), if you chose "By Amount" for **Type of Government Share**.
15.	Items / General	Click the **Additional Info** link on the left-hand menu (not shown).	

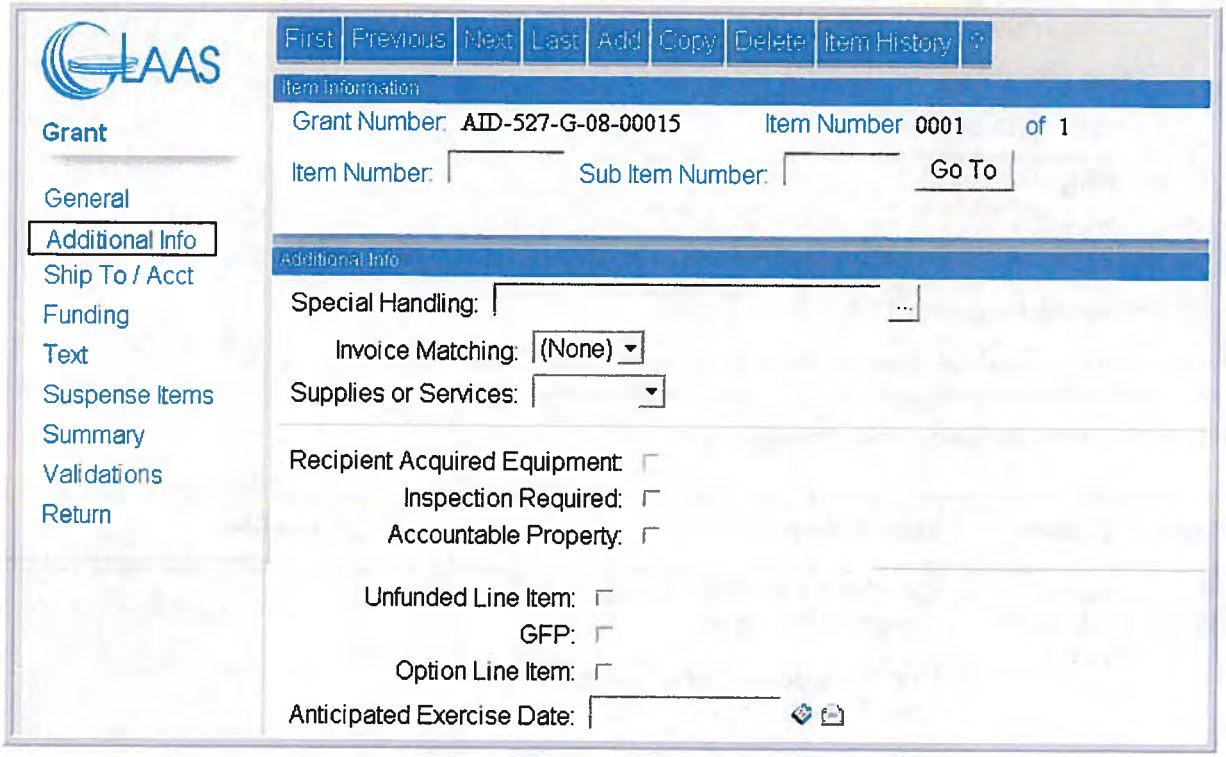


Figure 17: Items / Additional Info Screen

Steps	Section	User Action	Guidance
16.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Recipient Acquired Equipment:** Check this box if equipment was acquired by recipient. — O **Inspection Required:** Check this box if inspection of supplies is required. — O **Accountable Property:** Check the box if property qualifies. — O **Unfunded Line Item:** Check the box if this item is subject to availability of unknown accounting funds. — O **GFP:** Check the box if this item is Government Furnished Property. — O **Option Line Item:** Select this checkbox if this is an option line item. — O **Anticipated Exercise Date:** If the Option Line Item is checked, enter the estimated date the option will be exercised. — R/O	USAID is not currently using these fields: • **Special Handling** • **Invoice Matching** • **Supplies or Services** Selecting any of the following checkboxes will zero out the obligation of the line item: • **Unfunded Line Item** • **GFP** • **Option Line Item**

Days After Award:

Option Exercise Date:

FOB: Destination

Origin City:

Origin State:

CLIN Estimated Amount: 1500000

Figure 18: Items / Additional Info Screen

Steps	Section	User Action	Guidance
16. cont.	Items / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **FOB**: Select an option if this item has Free On Board (FOB) shipping. — O **Origin City / State:** Enter the City & State if Origin is selected for FOB. — R/O **CLIN Estimated Amount**: Review the estimated amount of the line item that was copied forward from the Requisition. — R	
17.	Items / Additional Info	Click the **Funding** link on the left-hand menu (not shown).	

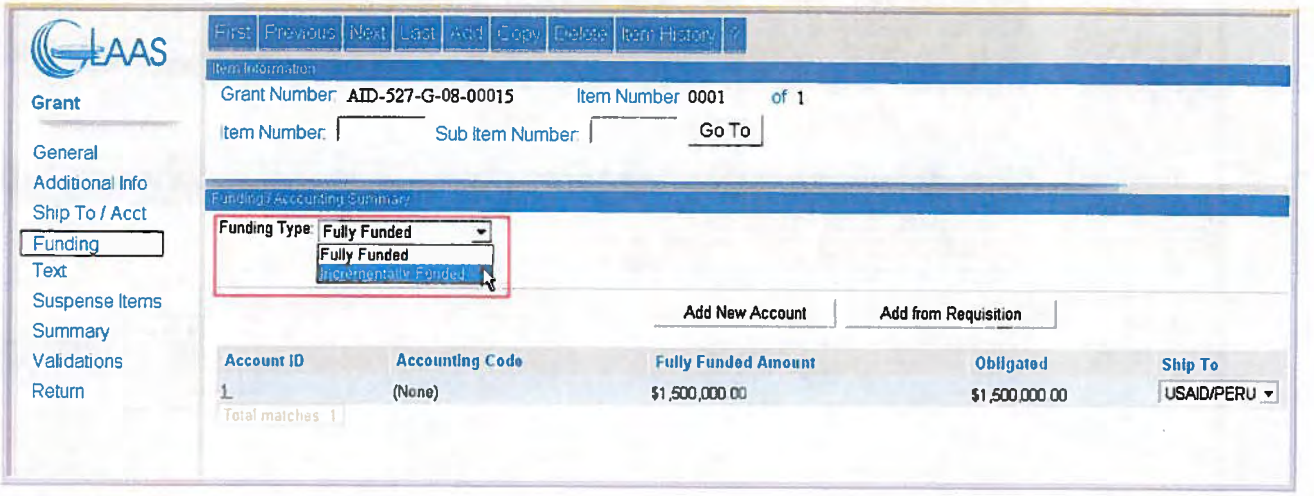


Figure 19: Items / Funding Screen

Steps	Section	User Action	Guidance
18.	Items / Funding	Select "Incrementally Funded" from the **Funding Type** dropdown list if the award is incrementally funded. OR Select "Fully Funded" from the **Funding Type** dropdown list if the award is fully funded.	Selecting "Incrementally Funded" will change the obligation amount to zero in the **Obligated** column. If the sum of the accounting lines is less than the line item amount, it is considered an incrementally funded action.

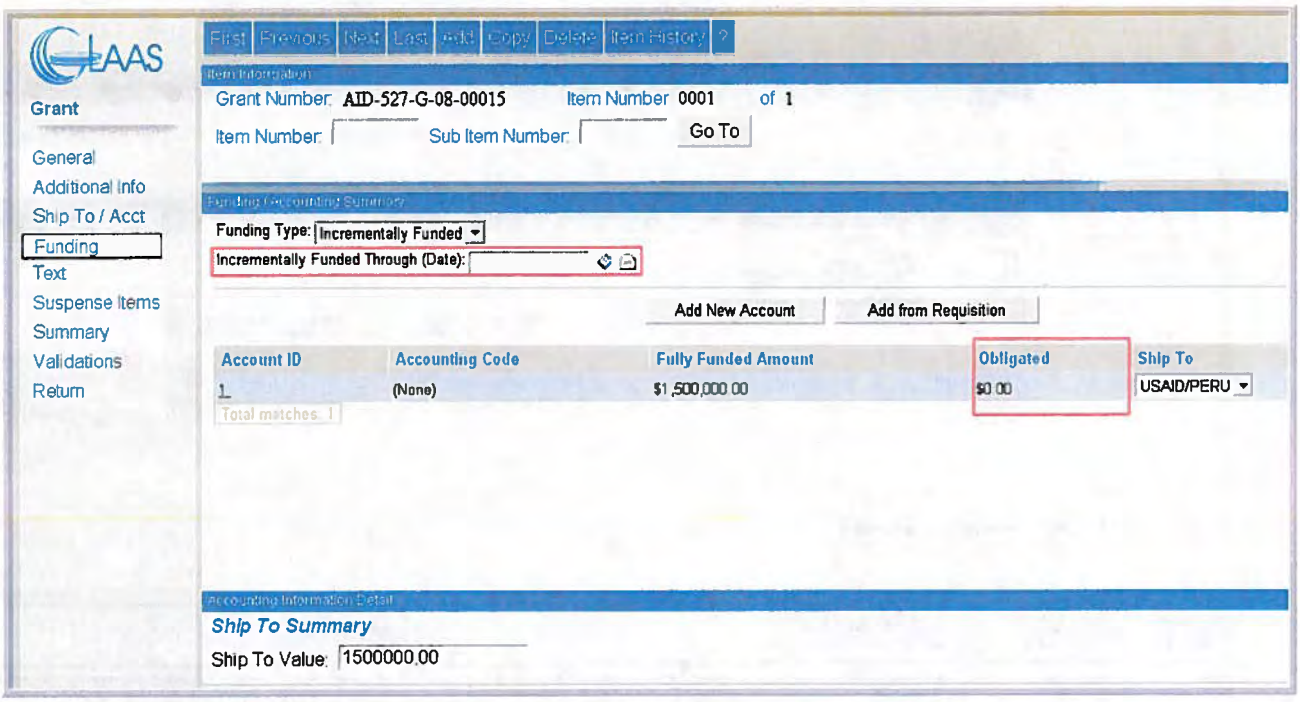


Figure 20: Items / Funding Screen

Steps	Section	User Action	Guidance
18. cont.	Items / Funding	**Incrementally Funded Through (Date):** Enter the date through which this line item is being incrementally funded with this action.	The **Obligated** amount has been changed to zero. You will update the correct obligated amount in the **Incrementally Funded Amount** field.

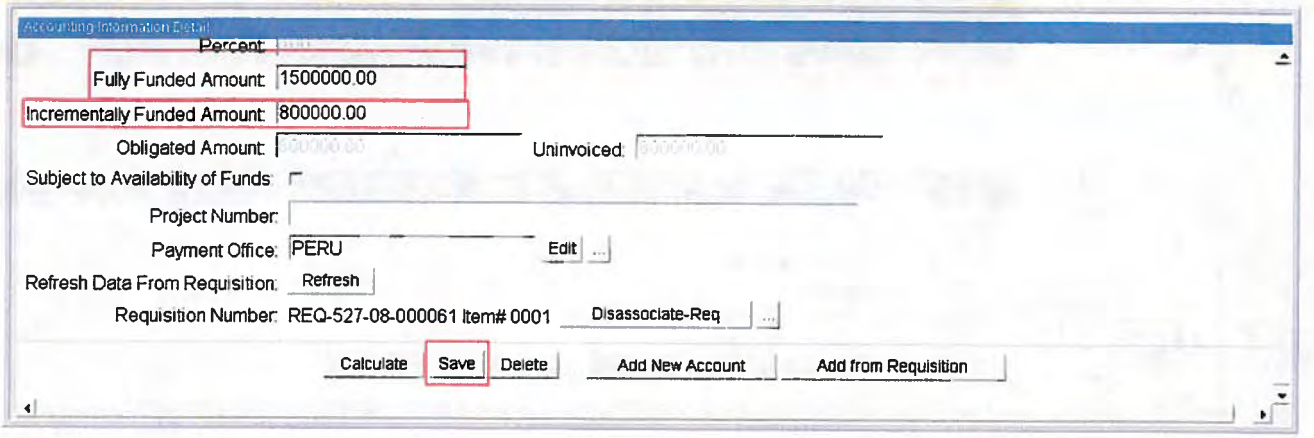


Figure 21: Items / Funding Screen

Steps	Section	User Action	Guidance
18. cont.	Items / Funding	Complete the following Required (R) and/or Optional (O) fields: **Ship To Value:** Enter the total estimated cost of the item (not shown). — R **Fully Funded Amount**: If the item is fully funded, enter the amount of funding against this accounting line item. — R/O **Incrementally Funded Amount**: If the award is incrementally funded, enter the amount of incremental funding against this accounting line for this action. — R/O	
19.	Items / Funding	Click the **Save** button. Verify the **Obligated** amount matches the **Incrementally Funded Amount**.	
20.	Items / Funding	Repeat **Steps 13-19** to edit other line items as necessary.	
21.	Items / Funding	Click the **Summary** link on the left-hand menu (not shown).	USAID is not currently using **Suspense Items**.

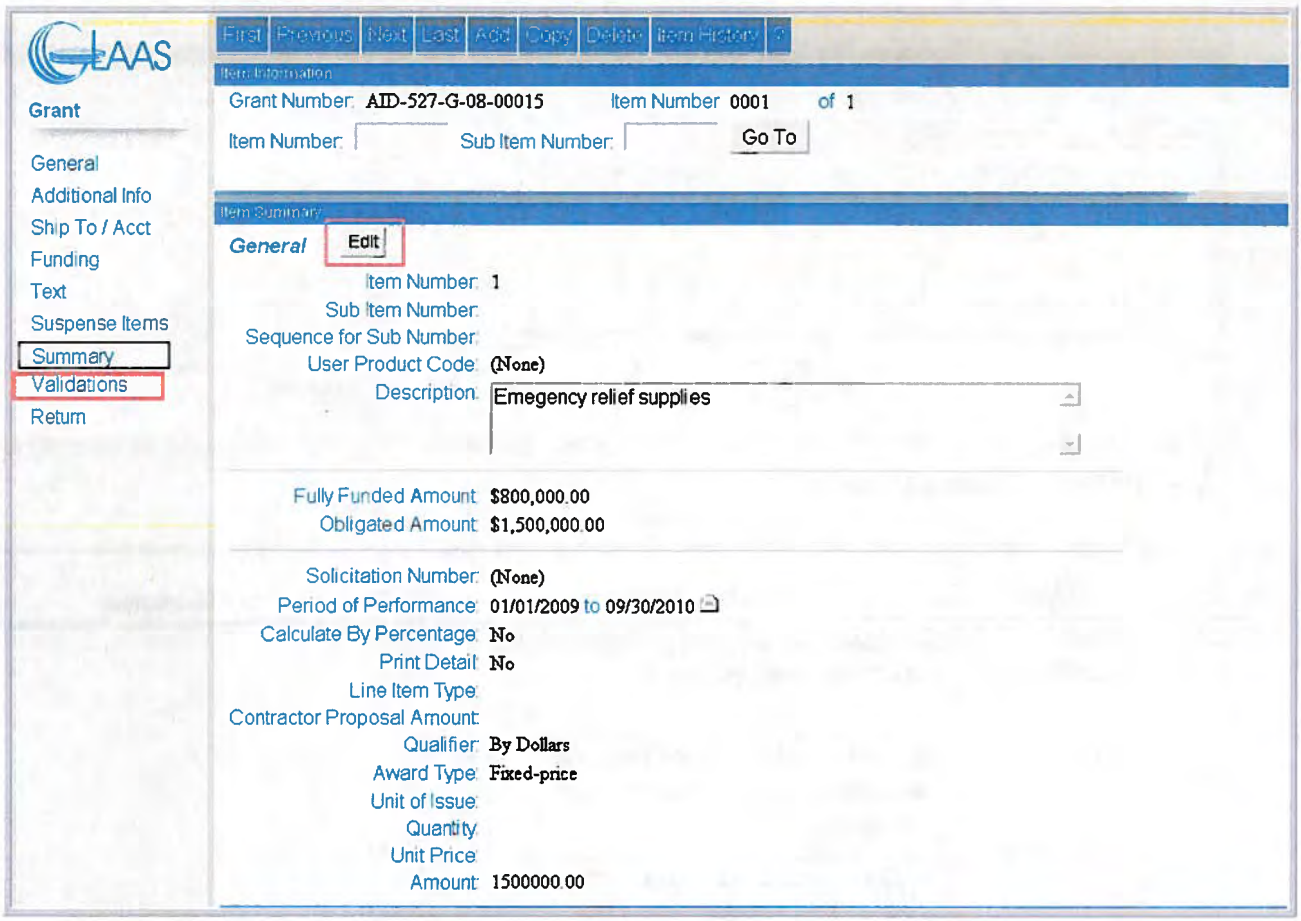


Figure 22: Items / Summary Screen

Steps	Section	User Action	Guidance
22.	Items / Summary	Review this screen to verify that all information on this line item is accurate.	The **Items / Summary** screen shows the basic information that applies to the current item, but you are not required to enter any information here. You can click the **Edit** button (Edit) on this screen if something needs to be changed.
23.	Items / Summary	Click the **Validations** link on the left-hand menu.	

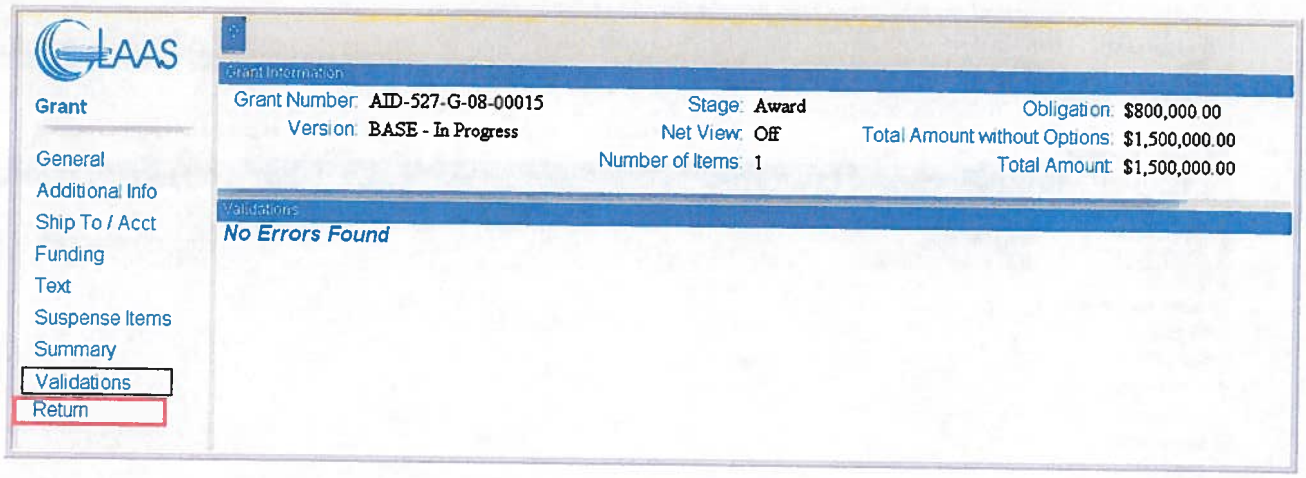


Figure 23: Items / Validations Screen

Steps	Section	User Action	Guidance
24.	Items / Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item.	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
25.	Items / Validations	Click the **Return** link on the left-hand menu.	

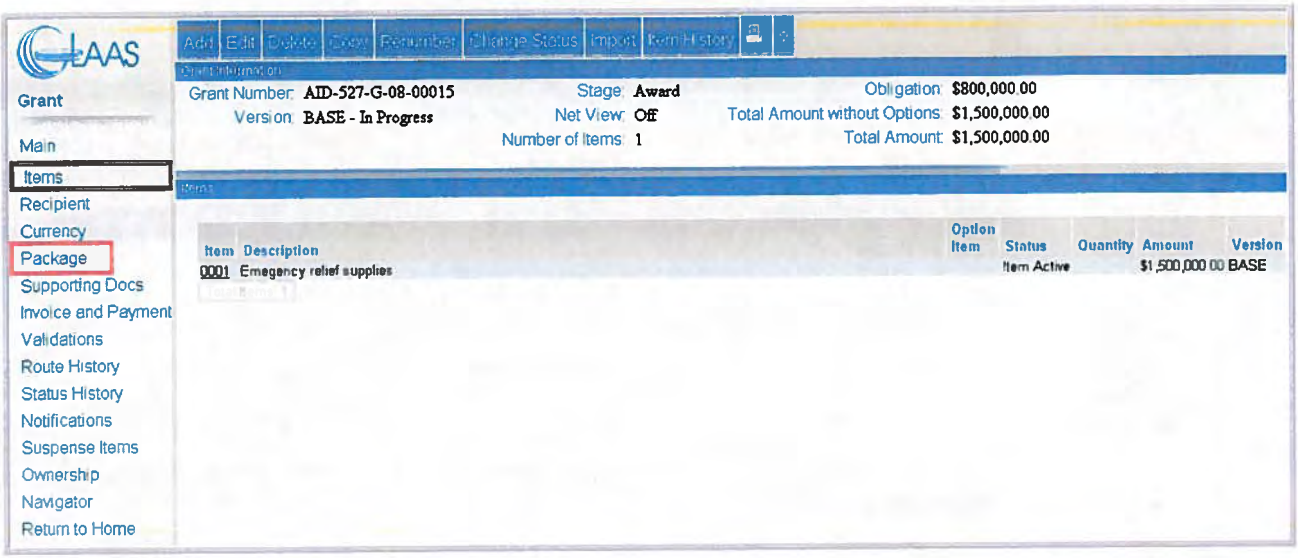


Figure 24: Items Screen

Steps	Section	User Action	Guidance
26.	Items	Click the **Package** link on the left-hand menu.	

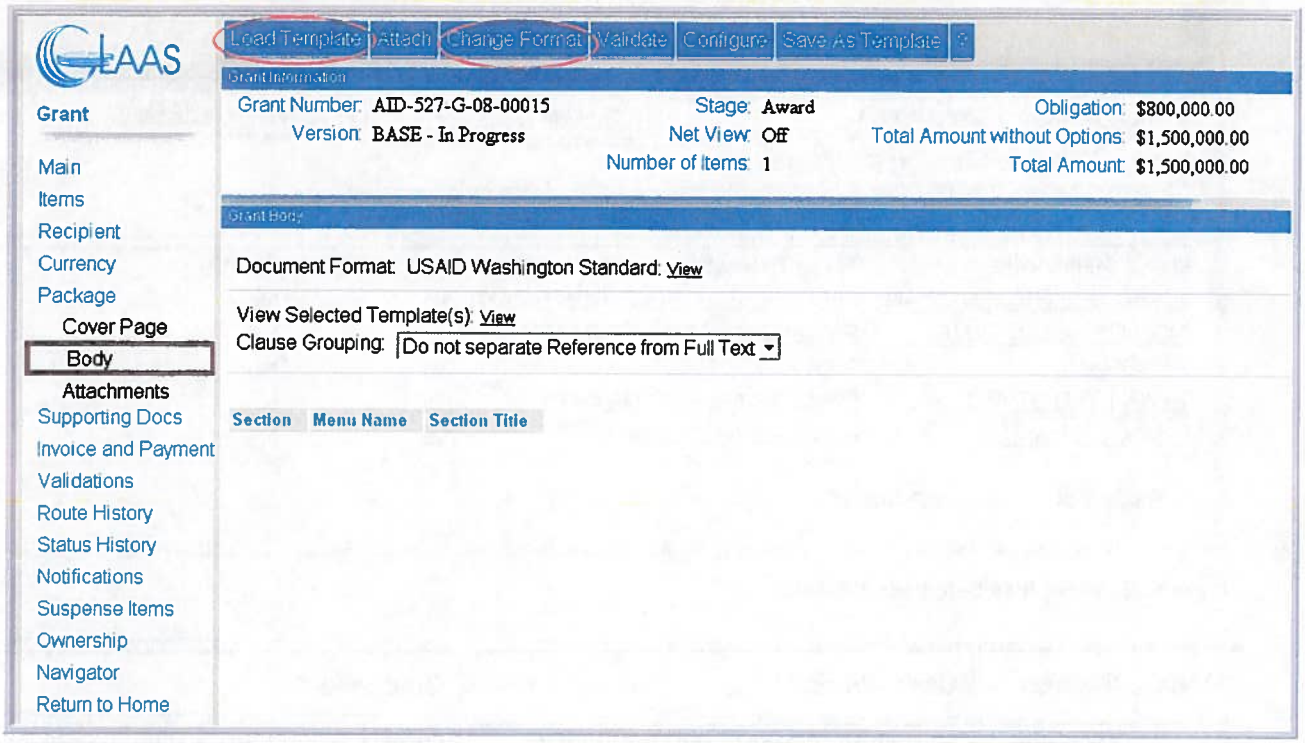


Figure 25: Package / Body Screen

Steps	Section	User Action	Guidance
27.	Package / Cover Page	Click the **Body** link on the left-hand menu (not shown).	The **Cover Page** link on the left-hand menu is not currently used on Assistance Awards. The agreement letters are included in the clause templates loaded below.
28.	Package / Body	Click the **Change Format** toolbar button.	
29.	Document Format Selection	Click the **USAID Assistance** link (not shown).	
30.	Package / Body	Click the **Load Template** toolbar button.	

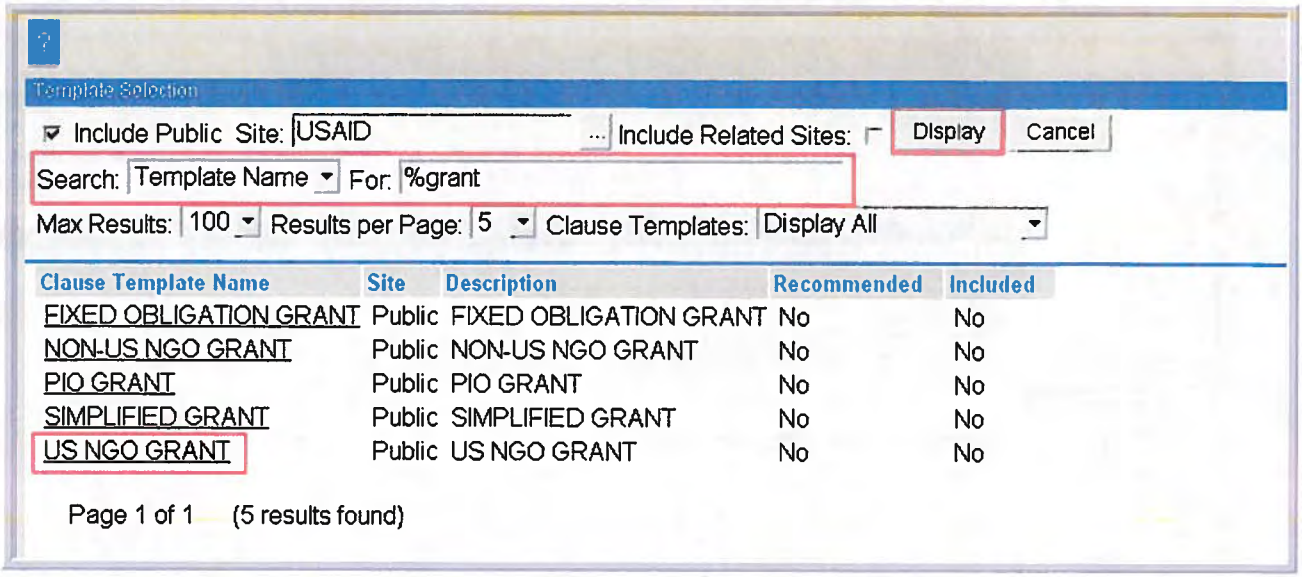


Figure 26: Template Selection Screen

Steps	Section	User Action	Guidance
31.	Template Selection	Search for the appropriate template. Click the **Display** button. Click the **Clause Template Name** link to select the correct sections.	GLAAS is configured with the following Assistance Award templates: • U.S. NGO Grants • Non-U.S. NGO Grants • U.S. NGO Cooperative Agreements • Non-U.S. NGO Cooperative Agreements • Public International Organization (PIO) Grants • Fixed Obligation Grants • Simplified Grants • U.S. Endowment • Non-U.S. Endowment

Template Selection

☑ Include Public Site: USAID ... Include Related Sites: ☐ Display Cancel

Search: Template Name For: %grant

Max Results: 100 Results per Page: 5 Clause Templates: Display All

Clause Template Name	Site	Description	Recommended	Included
FIXED OBLIGATION GRANT	Public	FIXED OBLIGATION GRANT	No	No
NON-US NGO GRANT	Public	NON-US NGO GRANT	No	No
PIO GRANT	Public	PIO GRANT	No	No
SIMPLIFIED GRANT	Public	SIMPLIFIED GRANT	No	No
US NGO GRANT	Public	US NGO GRANT	No	No

Page 1 of 1 (5 results found)

Section Selection

Select	Section Number	Section Title	Section Type
☐	CP	Cover Page	Custom
☐	Att A	Attachment A -Schedule	Custom
☐	Att B	Attachment B - Program Description	Custom
☐	Att C	Attachment C - Standard Provisions	Custom

Select All Continue

Figure 27: Template Selection Screen

Steps	Section	User Action	Guidance
31. cont.	Template Selection	Click the **Select All** button. Click the **Continue** button.	

Grant Body

Document Format: USAID Assistance: View

View Selected Template(s): View

Clause Grouping: Do not separate Reference from Full Text

Section	Menu Name	Section Title
CP	Cover Page	Cover Page
Att A	Attachment A	Attachment A -Schedule
Att B	Attachment B	Attachment B - Program Description
Att C	Attachment C	Attachment C - Standard Provisions

Figure 28: Package / Body Screen

Steps	Section	User Action	Guidance
32.	Package / Body	Select the **Cover Page** link under the **Section Title** column.	

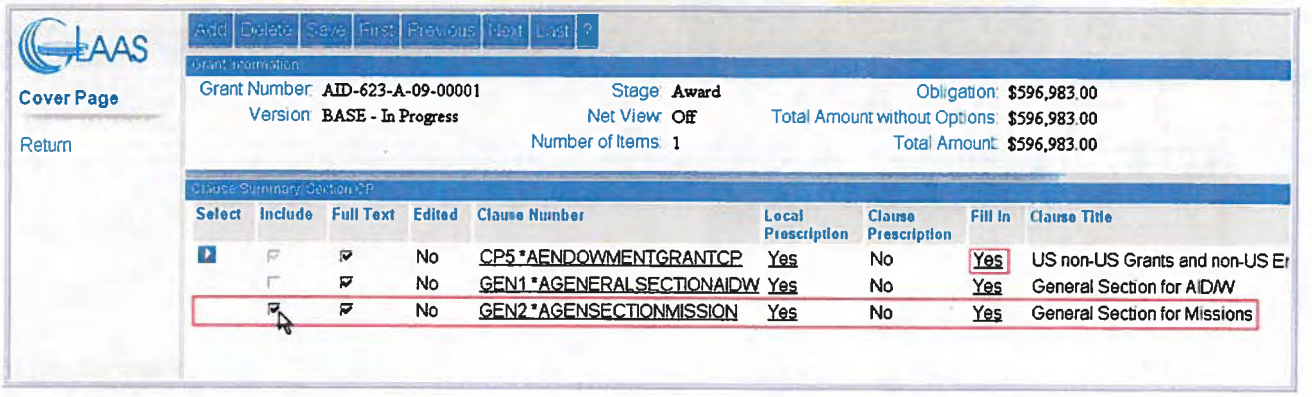


Figure 29: Cover Page Screen

Steps	Section	User Action	Guidance
33.	Cover Page	Check the box in the **Include** column to the left of the appropriate "General Section," either "AID/W" or "Missions." Scroll over to the **Fill In** column and click the **Yes** link.	

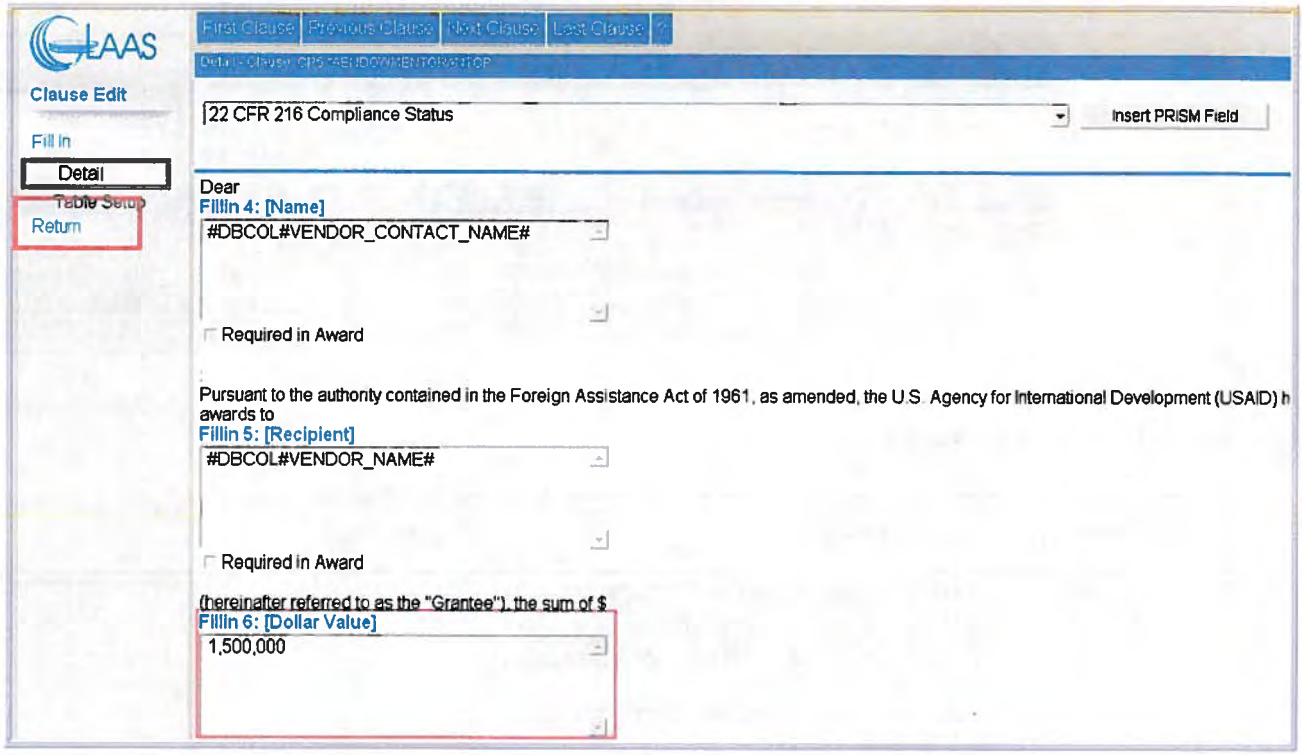


Figure 30: Clause Edit Screen

Steps	Section	User Action	Guidance
34.	Clause Edit	Complete all **Fillin** fields. Click the **Return** link on the left-hand menu.	**Fillin** fields containing "#DBCOL#(Description)#" will be auto-populated with information from GLAAS when you generate your document. If you prefer, you can erase it and manually enter text. Completing this screen will save time once you have generated your award document.
35.	Cover Page	Click the **Return** link on the left-hand menu.	

Grant Body

Document Format: USAID Assistance: View

View Selected Template(s): View

Clause Grouping: Do not separate Reference from Full Text

Section	Menu Name	Section Title
CP	Cover Page	Cover Page
Att A	Attachment A	Attachment A -Schedule
Att B	Attachment B	Attachment B - Program Description
Att C	Attachment C	Attachment C - Standard Provisions

Figure 31: Package Body Screen

Steps	Section	User Action	Guidance
36.	Package / Body	Click the **Attachment C – Standard Provisions** link under the **Section Title** column.	You do not need to open **Attachment B – Program Description** in GLAAS. You will paste the Program Description into the ".rtf" (rich text format) file generated by GLAAS later on.

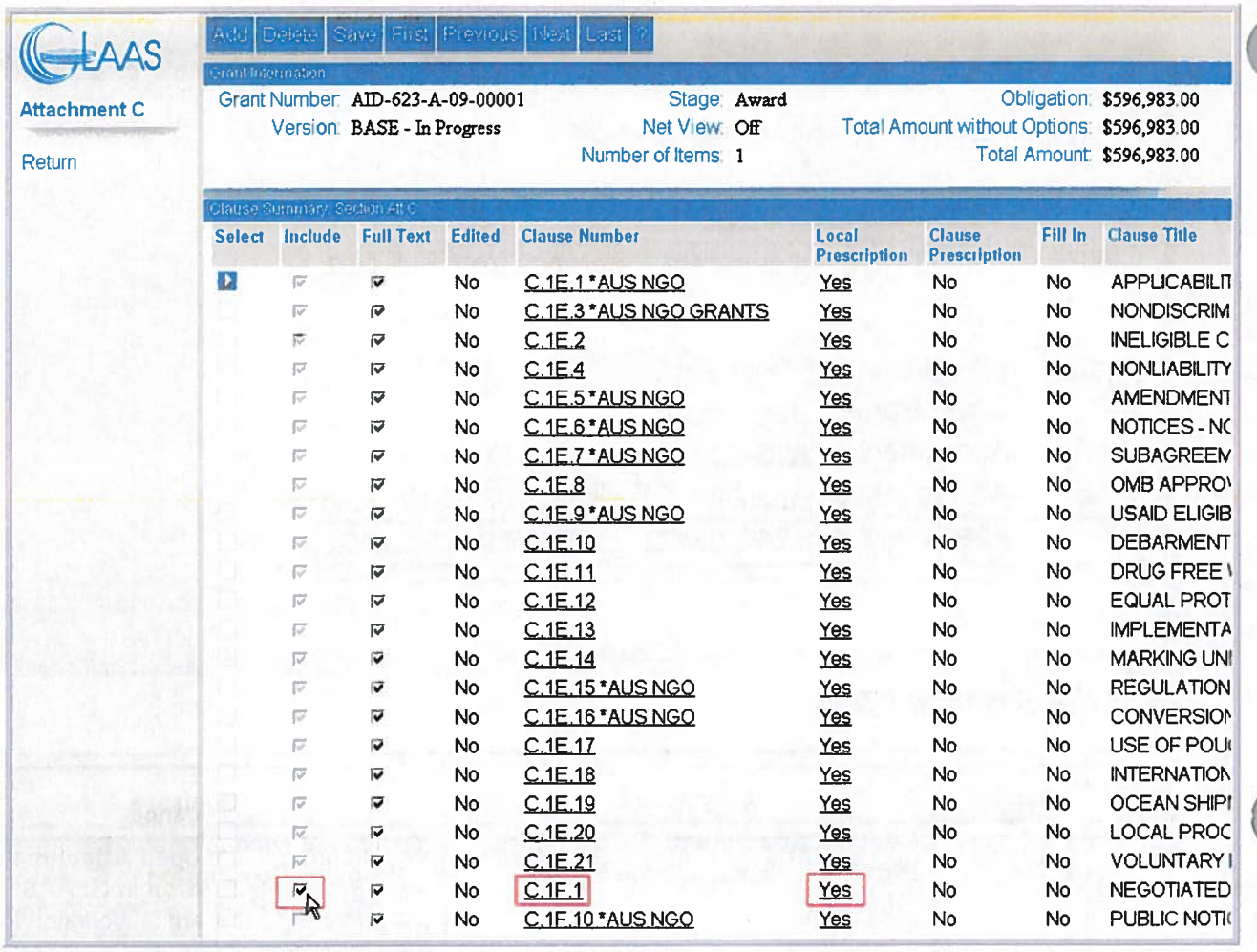


Figure 32: Attachment C Screen

Steps	Section	User Action	Guidance
37.	Attachment C	Check the **Include** column to include the appropriate provisions.	If you are unsure which provision you should include, click the **Yes** link under **Local Prescription** for guidance. The text of the provision can be viewed by clicking the links in the **Clause Number** column.
38.	Attachment C	Click the **Return** link on the left-hand menu (not shown).	
39.	Package / Body	Click the **Return** link on the left-hand menu (not shown).	
40.	Package / Body	Repeat **Steps 33-36** for the **Attachment A** section, making sure to complete all of the **Fill In** fields.	

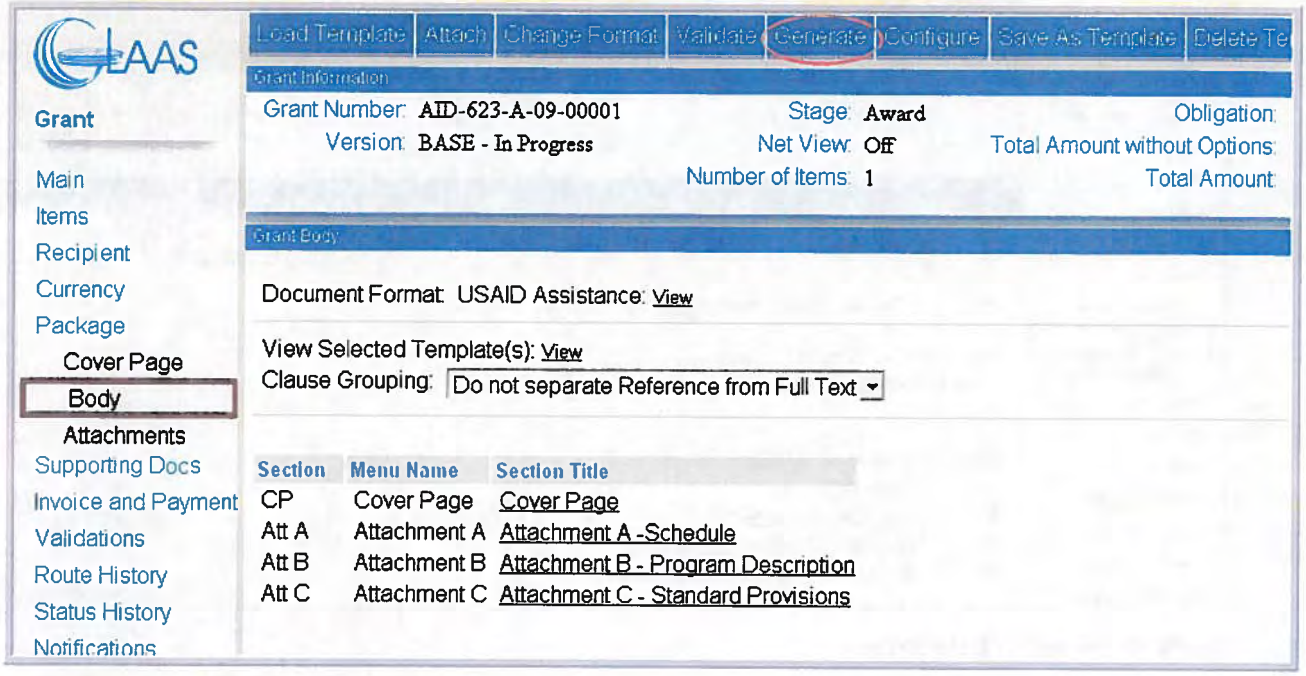


Figure 33: Package / Body Screen

Steps	Section	User Action	Guidance
41.	Package / Body	Click the **Generate** toolbar button.	Do not send ".rtf" documents to people outside of USAID. Convert the ".rtf" to a non-editable Adobe Acrobat file before sending it to a vendor or other outside party.

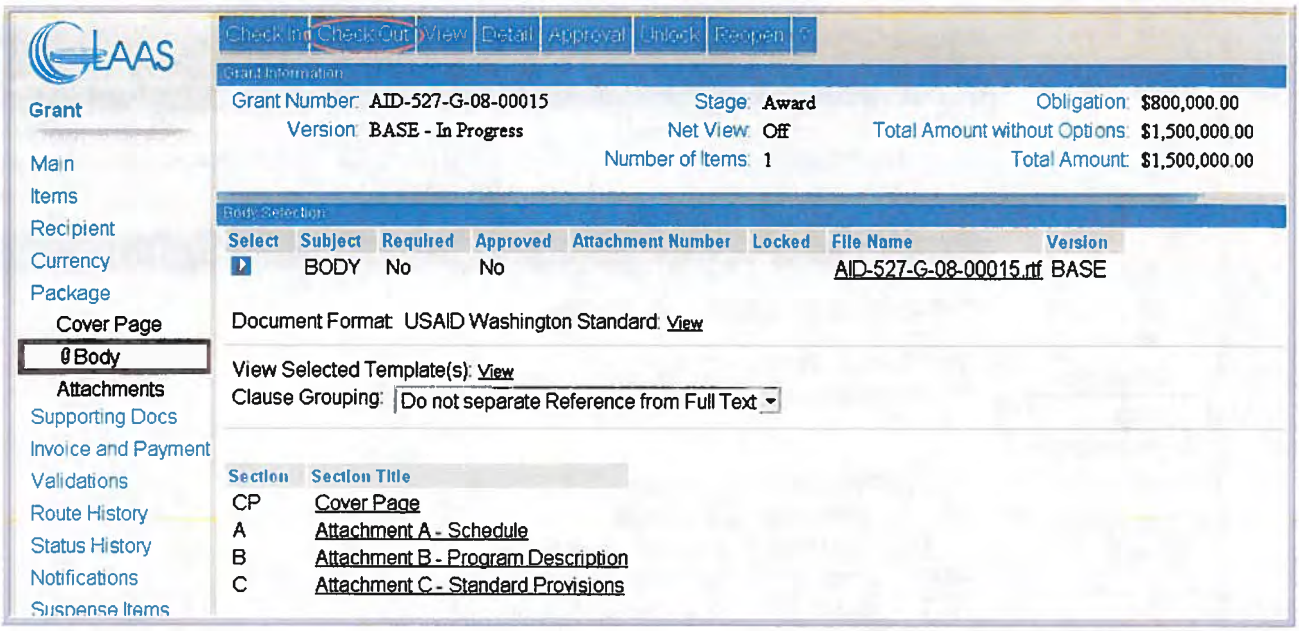


Figure 34: Package / Body Screen

Steps	Section	User Action	Guidance
42.	Package / Body	Click the **Check Out** toolbar button.	The award document in ".rtf" format has appeared under **File Name**.

Figure 35: Check Out Screen

Steps	Section	User Action	Guidance
43.	Check Out	Click the **Click here to Check Out AID.... .rtf** link.	

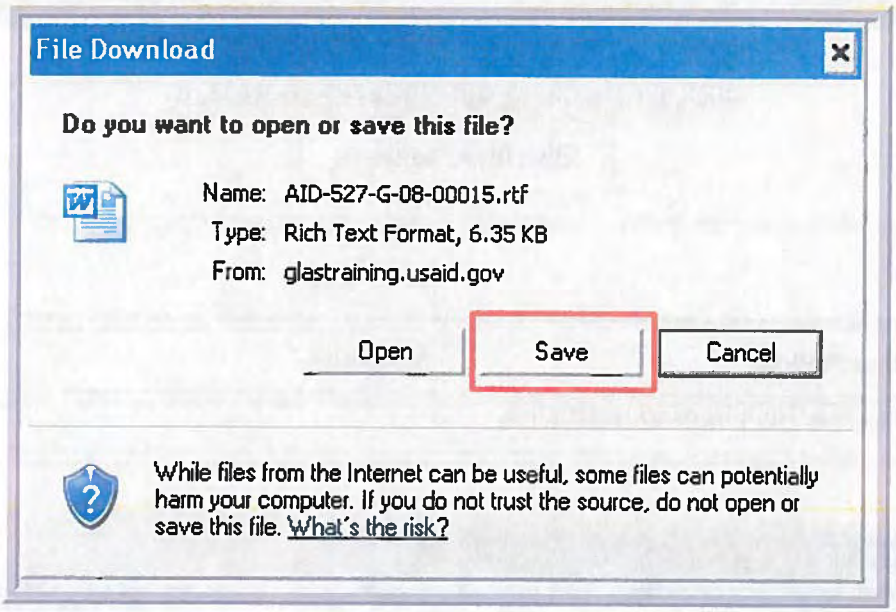


Figure 36: File Download Screen

Steps	Section	User Action	Guidance
44.	File Download	Always click the **Save** button to select where on your computer you would like to save this file.	If you click the **Open** button, the system will automatically save a copy to the temp file on your computer where you may not be able to retrieve it. To check the document back into the system, you must know the location of the saved document. The ".rtf" file name will match the document number. You must preserve that name in order to check the document back in.
45.	Microsoft Word	Open the GLAAS-generated ".rtf" file from the folder you saved it to. Make any necessary changes and formatting updates to the award document. Paste the Program Description under the **Attachment B** section.	

Figure 37: Check Out Screen

Steps	Section	User Action	Guidance
46.	Check Out	Click the **Click here to return** link.	

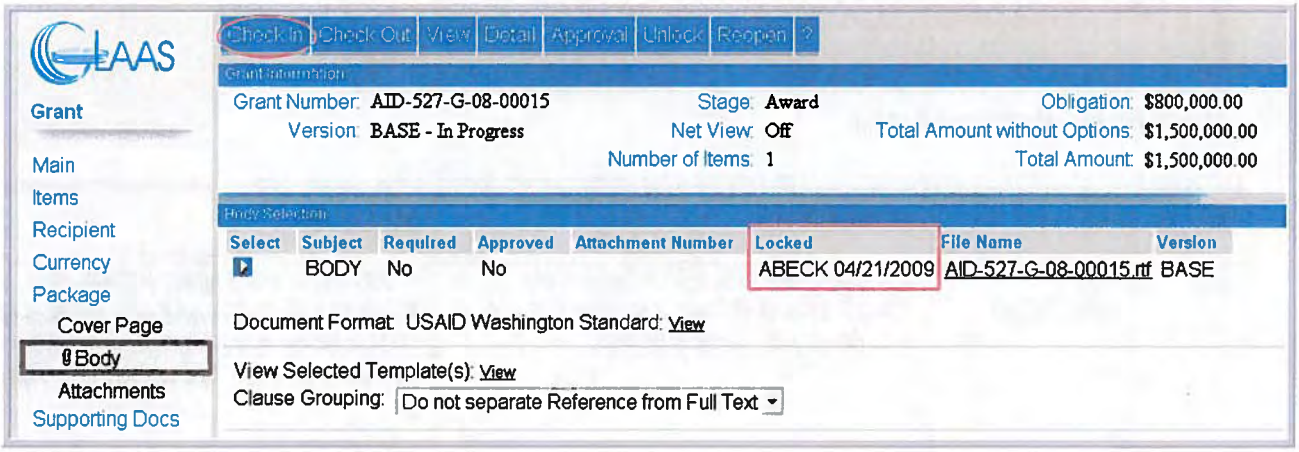


Figure 38: Package / Body Screen

Steps	Section	User Action	Guidance
47.	Package / Body	Click the **Check In** toolbar button.	The **Locked** column will show the user ID of the person who has the document Checked Out.

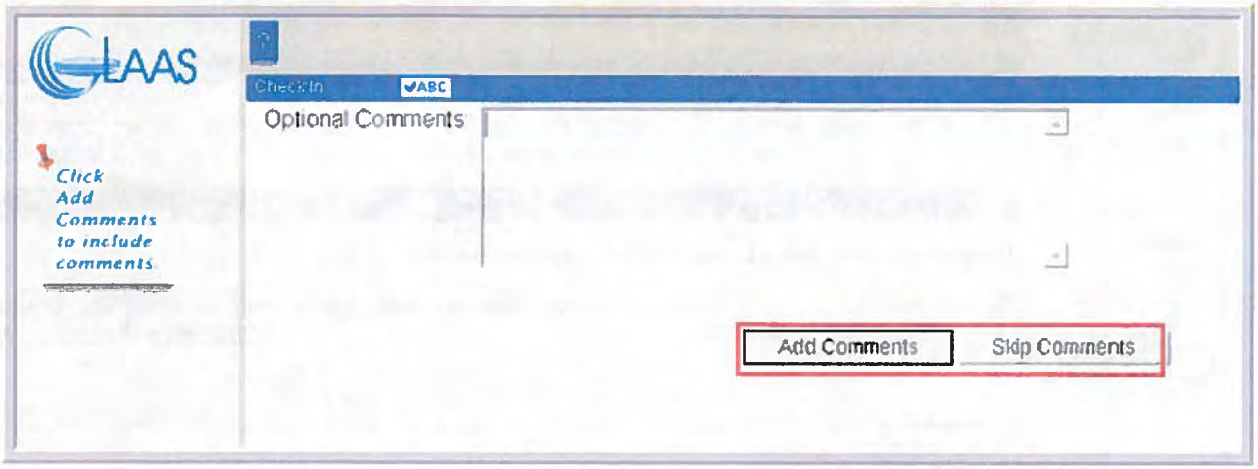


Figure 39: Check In Screen

Steps	Section	User Action	Guidance
48.	Check In	If you wish, enter any comments and click the **Add Comments** button. OR Click the **Skip Comments** button.	

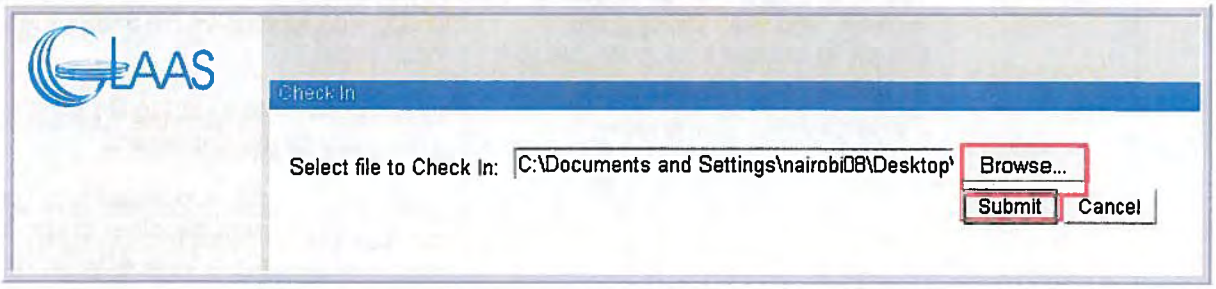


Figure 40: Check In Screen

Steps	Section	User Action	Guidance
49.	Check In	Click the **Browse** button to search for and locate the updated ".rtf" file on your computer. Click the **Submit** button.	

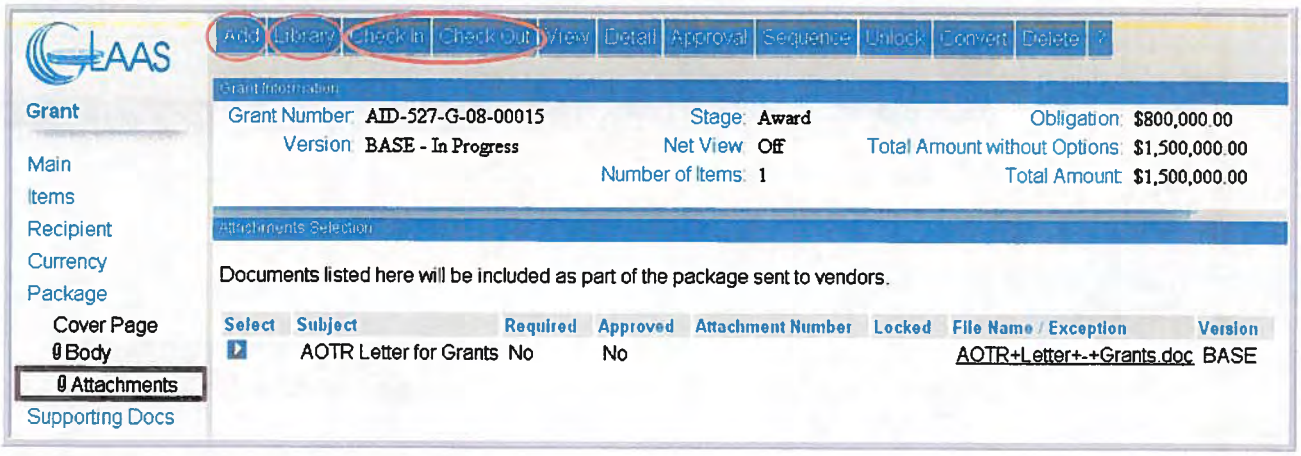


Figure 41: Package / Attachments Screen

Steps	Section	User Action	Guidance
50.	Package / Body	Click the **Attachments** link on the left-hand menu.	
51.	Package / Attachments	Click the **Add** or **Library** toolbar button to add an attachment to the Award package (not shown). Modify an existing document by clicking the **Check Out** toolbar button to check the document out of GLAAS, and then clicking the **Check In** toolbar button to upload it back into GLAAS after you have made changes (not shown).	The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." The *Adding Attachments and Supporting Documentation* user guide explains how to add files to your GLAAS documents in more detail. Any attachments from the Requisition will be pulled into the Award. Once a document is loaded here, you can use the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs**.
52.	Package / Attachments	Click the **Validations** link on the left-hand menu (not shown).	

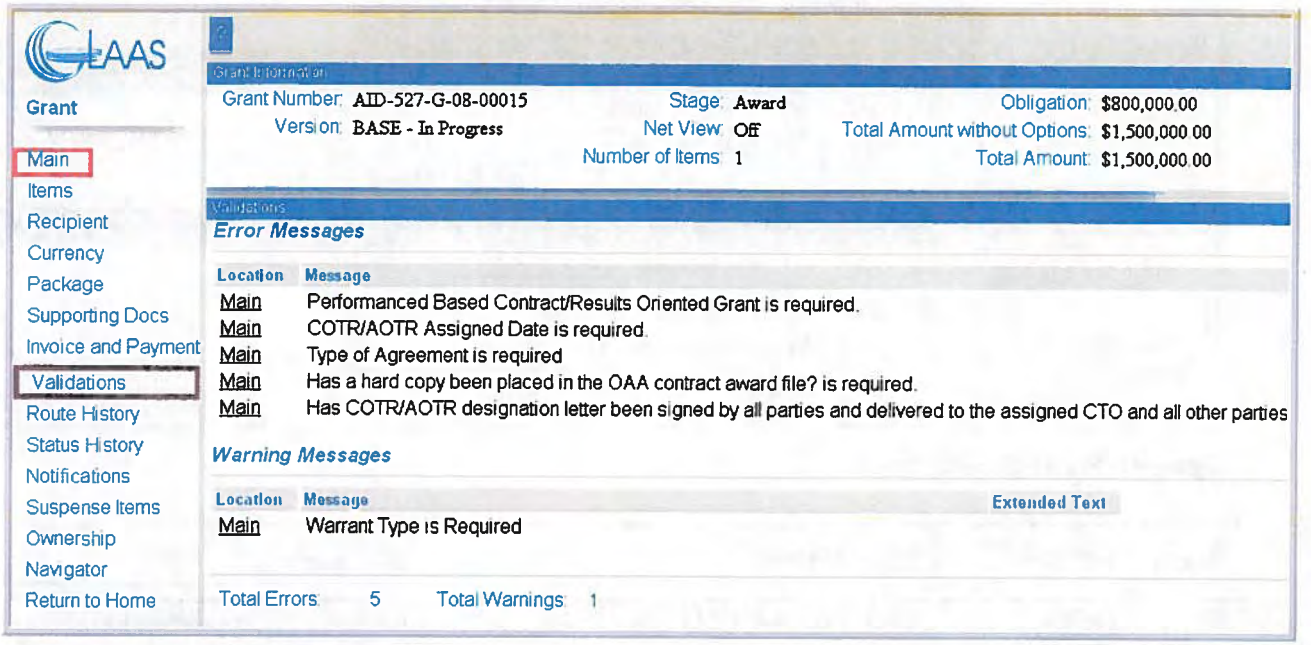


Figure 42: Award Validations Screen

Steps	Section	User Action	Guidance
53.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the line item (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
54.	Validations	Click the **Main** link on the left-hand menu.	

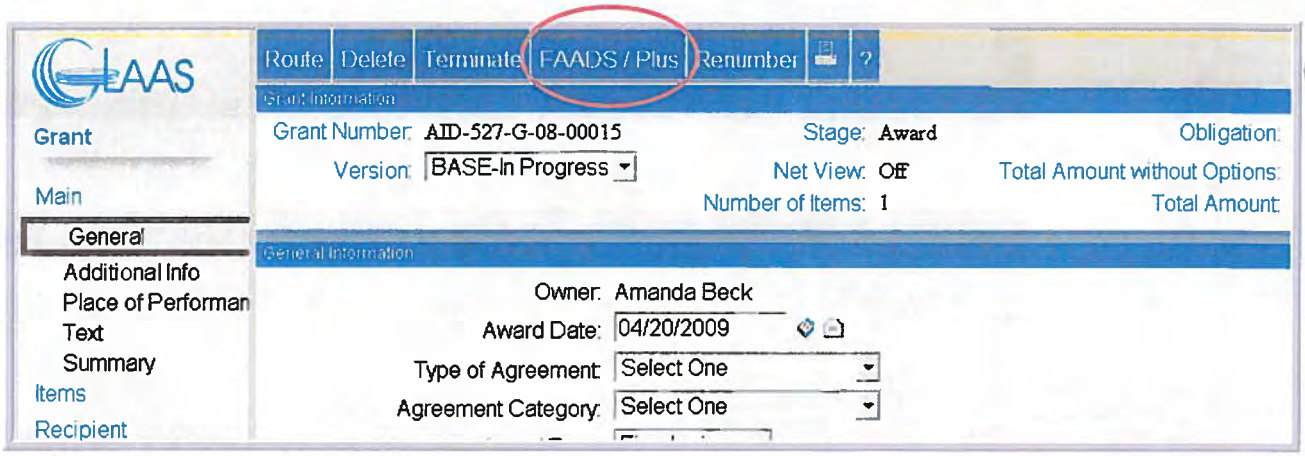


Figure 43: Main / General Screen

Steps	Section	User Action	Guidance
55.	Main / General	Click the **FAADS / Plus** toolbar button.	All Assistance Awards to U.S. recipients must be reported to the Federal Assistance Award Data System (FAADS).

Figure 44: FAADS Screen

Steps	Section	User Action	Guidance
56.	FAADS	Select "2006" from the **Form Version** dropdown list. Click the **Submit** button.	

Form Version: 2006

1. CFDA Program Number:	98 . 001
2. State Application Identifier (SAI Number):	SAI NOT APPLICABLE
3. Recipient Name:	INTERNATIONAL RELIEF AND DEVELOPME
DUNS Number (FAADS Plus):	047802223
+4 (FAADS Plus):	
Dun & Bradstreet Confidence Code (FAADS Plus):	
Address 1 (FAADS Plus):	1621 N KENT ST 4TH FLR
Address 2 (FAADS Plus):	
Address 3 (FAADS Plus):	
4. Recipient City Code:	
5. Recipient City Name:	(None)
6. Recipient County Code:	(None)
7. Recipient County Name:	(None)
8. Recipient State Code:	(None)
9. Recipient Zip Code:	22209-213
10. Type of Recipient:	12- Other Nonprofit
11. Type of Action:	A- New Assistance Action
12. Recipient Congressional District:	8

Figure 45: FAADS Screen

Steps	Section	User Action		Guidance
57.	FAADS	Complete the following Required (R) and/or Optional (O) fields:		A link to the list of U.S. Congressional Districts can be found on the GLAAS **Welcome** screen. The system will auto populate the **Recipient Name** and other fields in group 3 of the form and **Recipient Zip Code**.
		1. CFDA Program Number: Select the Catalog of Federal Domestic Assistance (CFDA) program number that applies to your award.	R	
		2. State Application Identifier (SAI Number): Type the SAI number assigned to your award recipient. If no number is assigned, enter "SAI NOT APPLICABLE."	R	
		10. Type of Recipient: Select the recipient code that best applies to the recipient of this award action.	R	
		11. Type of Action: Select the category that describes this action.	R	
		12. Recipient Congressional District: Enter the recipient's congressional district.	R	

13. Federal Agency/Organizational Unit Code:	7200
14. Federal Award Identification Number:	
a. Core Number:	AID527G0800014
b. Modification Number:	(None)
15. Federal Funding Sign:	Obligation
16. Federal Funding Amount (USD):	800000
17. Non-Federal Funding Sign:	Obligation
18. Non-Federal Funding Amount (USD):	0
19. Total Funding Sign:	Obligation
20. Total Funding Amount (USD):	800000
21. Obligation / Action Date (YYYYMMDD):	20090420
22. Starting Date (YYYYMMDD):	20090101
23. Ending Date (YYYYMMDD):	20100930
24. Type of Assistance Transaction:	04- Project Grant (B)
25. Record Type:	2- Action-by-Action Reporting
26. Correction / Late Indicator:	L- Late
27. Fiscal Year and Quarter Correction:	(None)
28. Principal Place of Performance Code:	
Project Location:	Foreign Country

Figure 46: FAADS Screen

Steps	Section	User Action	Guidance
57. cont.	FAADS	Complete the following Required (R) and/or Optional (O) fields: **13. Federal Agency/ Organizational Unit Code:** The code for USAID is "7200." — R **24. Type of Assistance Action:** Select the type that best describes this action. — R **28. Principal Place of Performance – Project Location:** Select the appropriate location. — R	The rest of the information has populated from GLAAS. Do not edit those fields.
58.	FAADS	Click the **Validate** button and correct any errors that appear (not shown). If no errors are found, click the **Return** link on the left-hand menu (not shown).	
59.	FAADS	Click the **Submit** button (not shown).	

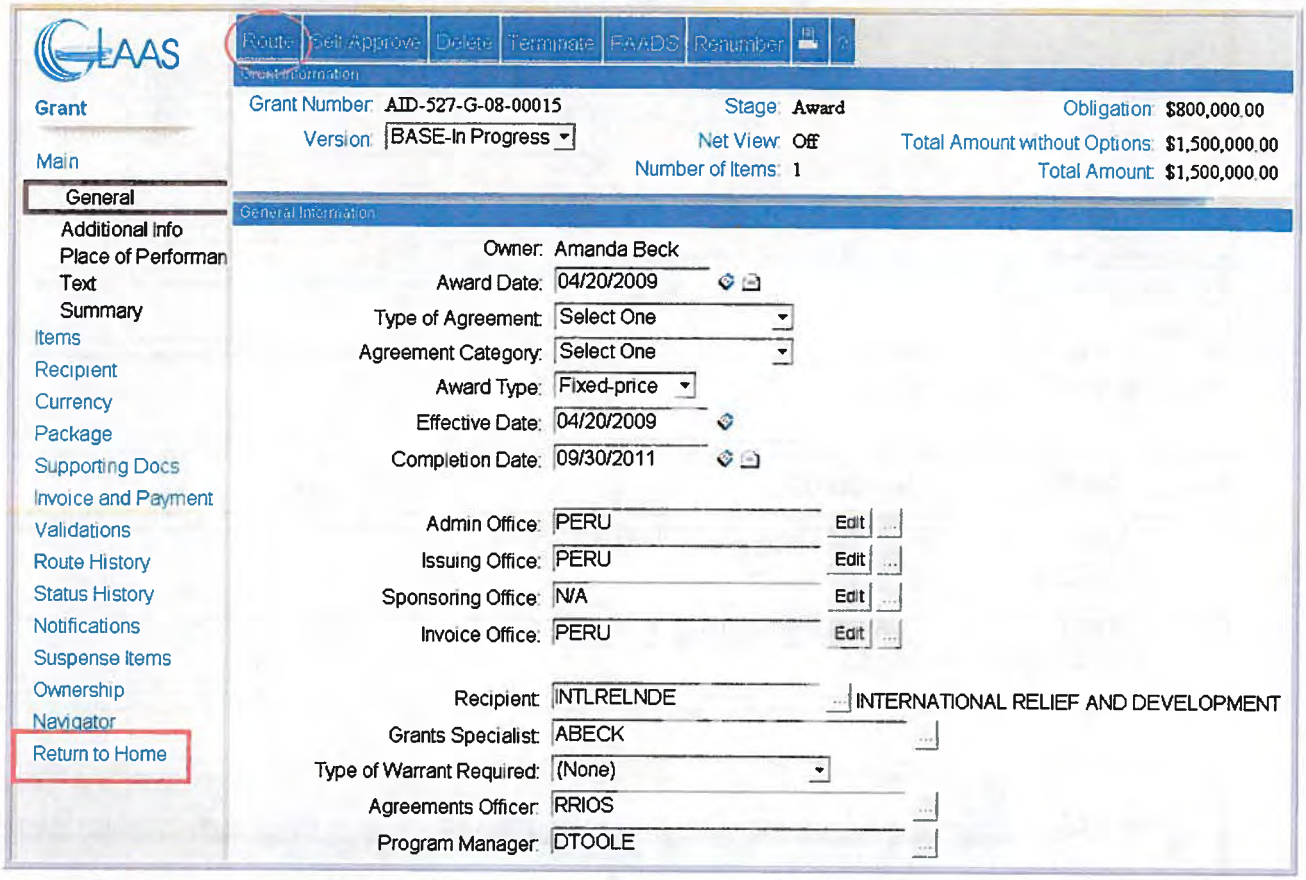


Figure 47: Main / General Screen

Steps	Section	User Action	Guidance
60.	Main / General	Click the **Route** toolbar button. Refer to the *Routing a Document* user guide for further instructions.	The **Route** button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for **Approval** to the Agreement Officer.
61.	Main / General	Click the **Return To Home** link.	

After the Award has been approved and released by the AO, open the Award and complete these steps giving the Admin Office access to the award.

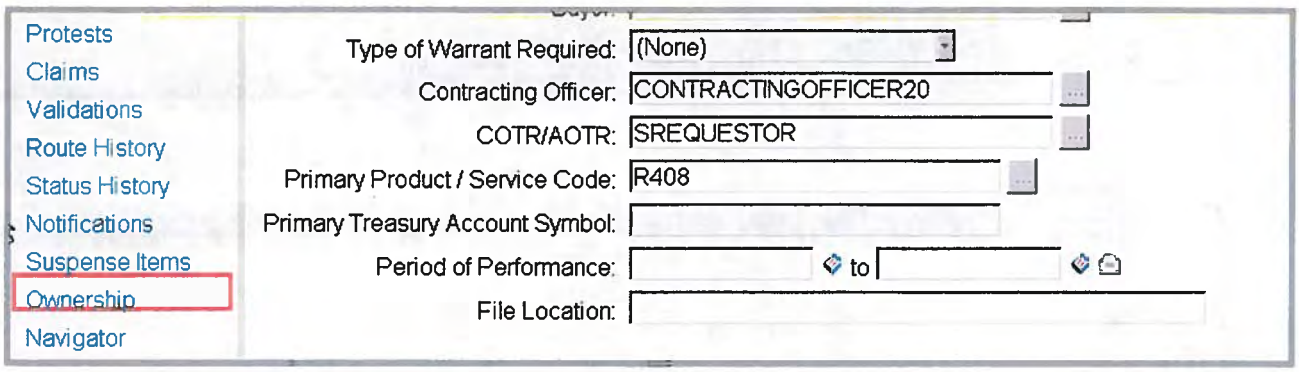


Figure 48: Main / General Screen

Steps	Section	User Action	Guidance
62.	Main / General	Click the **Ownership** link on the left-hand menu.	
63.	Share Document	Click the **Edit** toolbar button (not shown).	

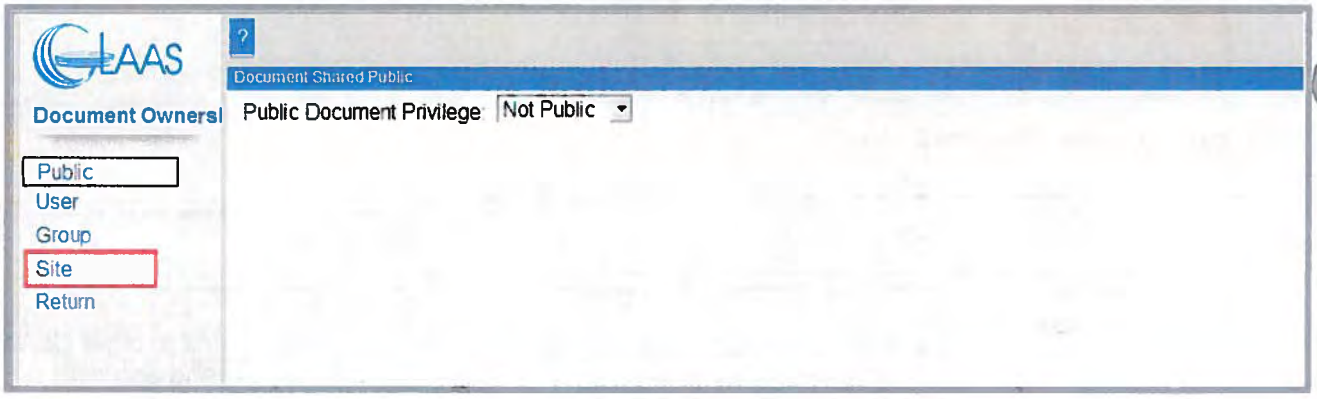


Figure 49: Document Shared Public Screen

Steps	Section	User Action	Guidance
64.	Document Shared Public	Click the **Site** link on the left-hand menu	
65.	Document Shared Site	Click the **Add** toolbar button (not shown).	

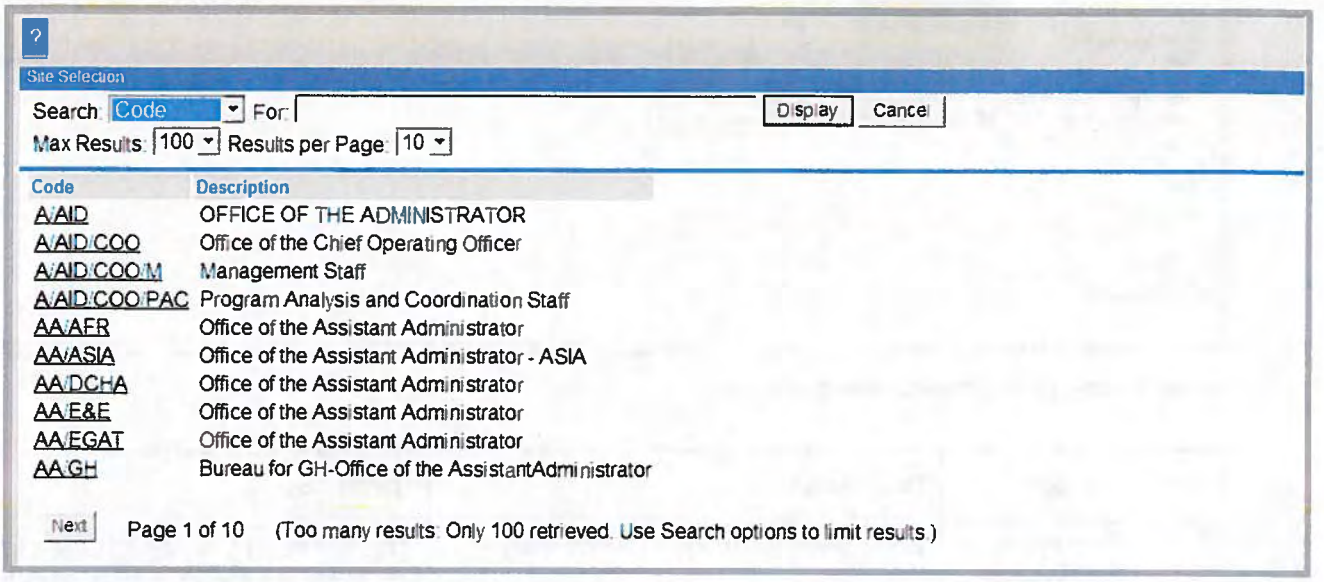


Figure 50: Site Selection Screen

Steps	Section	User Action	Guidance
66.	Site Selection	Search for and select the AOTR's site.	This is the same as the **Admin Office** on the Main / General screen.

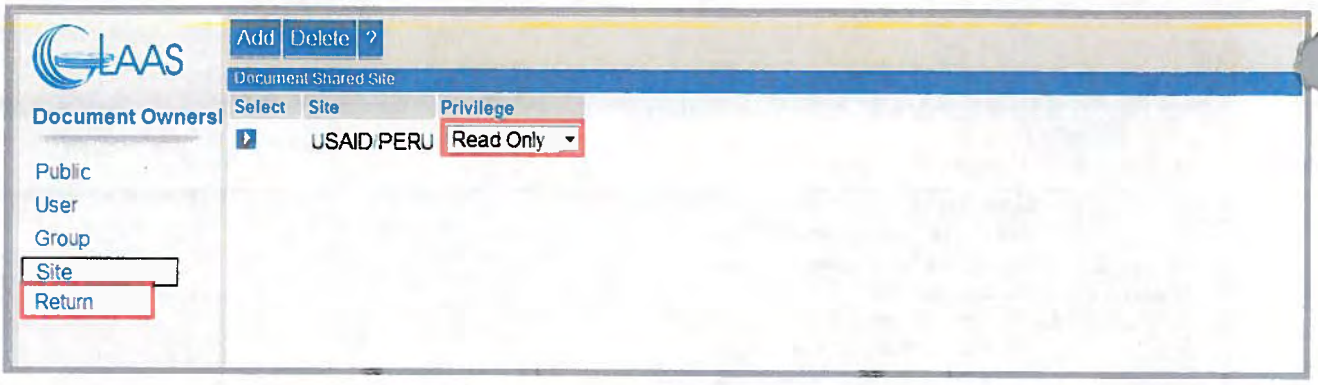


Figure 51: Document Shared Site Screen

Steps	Section	User Action	Guidance
67.	Document Shared Site	Ensure the **Privilege** is Read Only.	This will allow the Admin Office to view the released award, and access it.
68.	Document Shared Site	Click the **Return** link on the left-hand menu.	
69.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

USAID
FROM THE AMERICAN PEOPLE

GLAAS 102: Working with Migrated Awards

November 2009

Migrated Awards Objectives

- At the end of this topic, you will know how to:
  - Work with migrated awards
  - Modify a migrated award to de-obligate funds
  - Modify a migrated award to add funding

GLAAS Data Migration

- GLAAS contains historical data from NMS/A&A and the Missions
- The following data will be migrated to GLAAS:

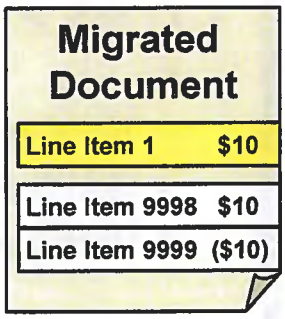
USAID/W
- **NMS/A&A data for all open awards and orders**
- **NMS/A&A data for awards and orders closed within the past three years**

Missions
- **A combination of mission-supplied and Phoenix data for all open awards and orders**

- Migrated actions will be linked to Phoenix documents

Award Line Items

- The award line items:
  - Add up to the Award TEC
  - Are marked as "Unfunded Line Items"
  - Will have no Ship To or Accounting information
- There may be multiple award line items
  - Missions have one line item
  - USAID/W has one or more



Informational Line Items

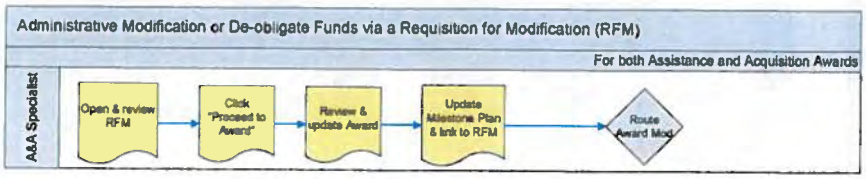
- The 9998 Line Item is:
  - The total migrated obligated amount for the award
  - Where the migrated accounting information is located
- The 9999 Line Item is:
  - The negative total migrated obligated amount for the award
  - Marked as an Unfunded Line Item
- The 9998 and 9999 amounts must always cancel each other out
- A migrated GLAAS award can be linked to multiple Phoenix records

Migrated Award

Line Item 1	$10
Line Item 9998	$10
Line Item 9999	($10)

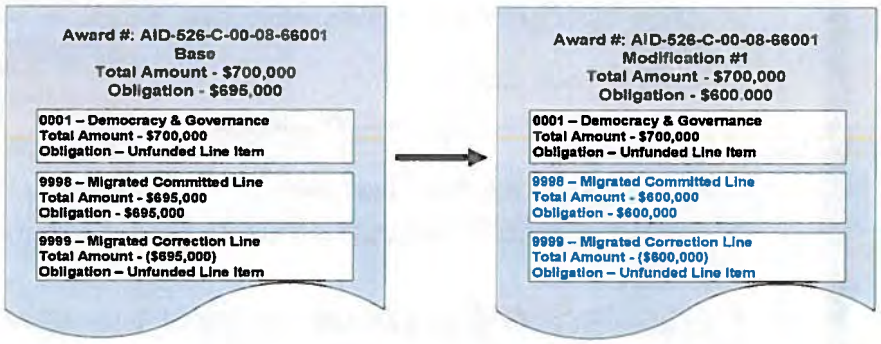
De-obligating Migrated Awards

- The Requestor:
  - Initiates the modification process via a Requisition for Modification
- The A&A Specialist:
  - Modifies the award to de-obligate funding
  - Updates the Milestone Plan
  - Routes the modification for review and approval
- The Contracting/Agreement Officer:
  - Reviews and approves the award



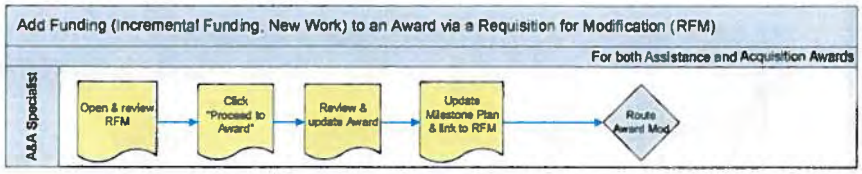
De-obligating a Migrated Award

- When de-obligating a migrated award you will only edit the 9998 and 9999 line items to reduce the original migrated obligation



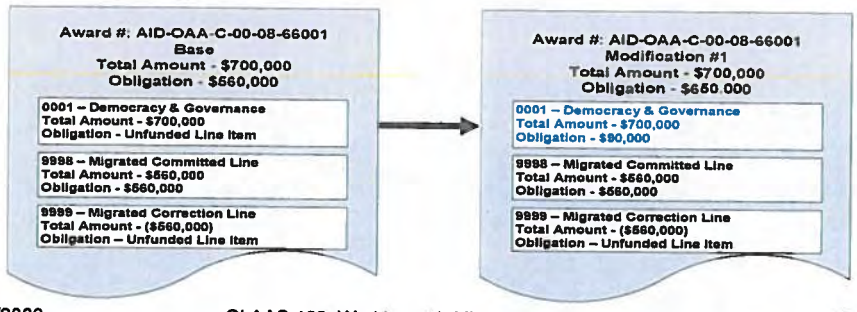
Add Funding to a Migrated Award

- The Requestor:
  - Initiates the modification process via a Requisition for Modification
  - Updates or adds additional funding
- The A&A Specialist:
  - Modifies the award to add funding
  - Updates the Milestone Plan
  - Routes the modification for review and approval
- The Contracting/Agreement Officer:
  - Reviews and approves the award



Add Funding to a Migrated Award

- When you increase funding on a migrated award, you edit the award line item(s) to:
  - Remove the "Unfunded Line Item" label
  - Add funding from the requisition and refresh the accounting data
- You do not edit the informational line items



GLAAS 102 USER GUIDE:

PROCESSING A DE-OBLIGATION OR ADMINISTRATIVE MODIFICATION ON A MIGRATED AWARD

PURPOSE:

This user guide will show you how to modify a migrated Award to de-obligate funds or to process an administrative modification.

BEFORE STARTING:

1. In order to process a modification for an Order or Award, you must be an A&A Specialist or a Contracting/Agreement Officer.
2. A Requisition for Modification must has been created, approved and released in GLAAS.
3. A Milestone Plan for the modification has been created, linked to the Requisition for Modification, and baselined.

NOTE:

The screenshots in this user guide apply to Contracts, but the process for modifying Assistance Awards is the same.

STEPS:

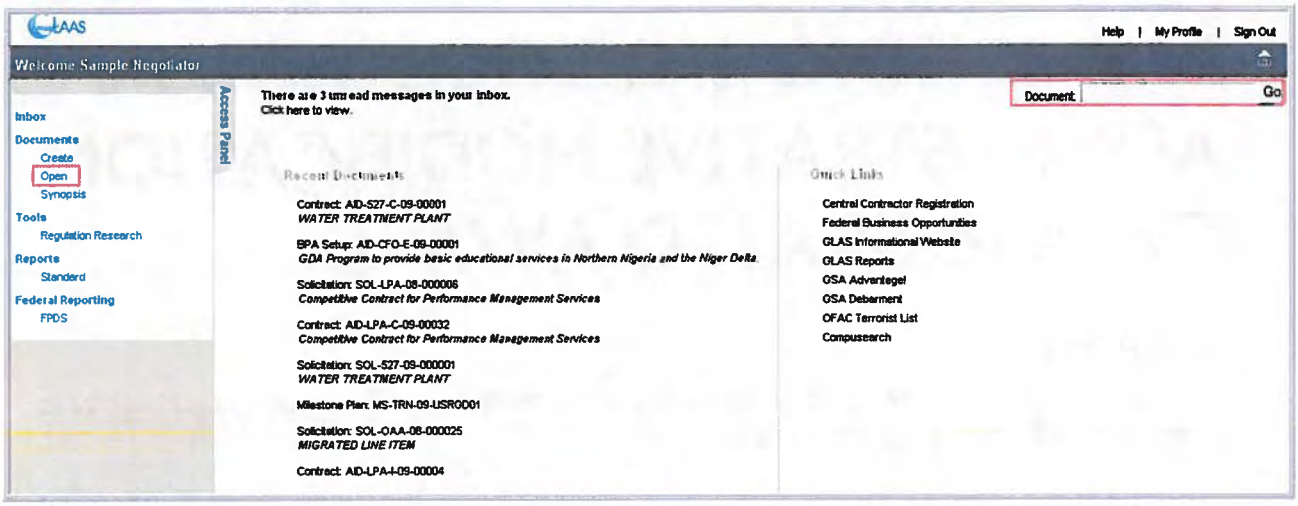


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	Welcome	Log on to GLAAS (not shown).	
2.	Document Selection	Click the **Open** link on the **Access Panel**. OR Type in the Requisition for Modification Number in the **Document** search field, click the **Go** button, and then skip to **Step 6**.	

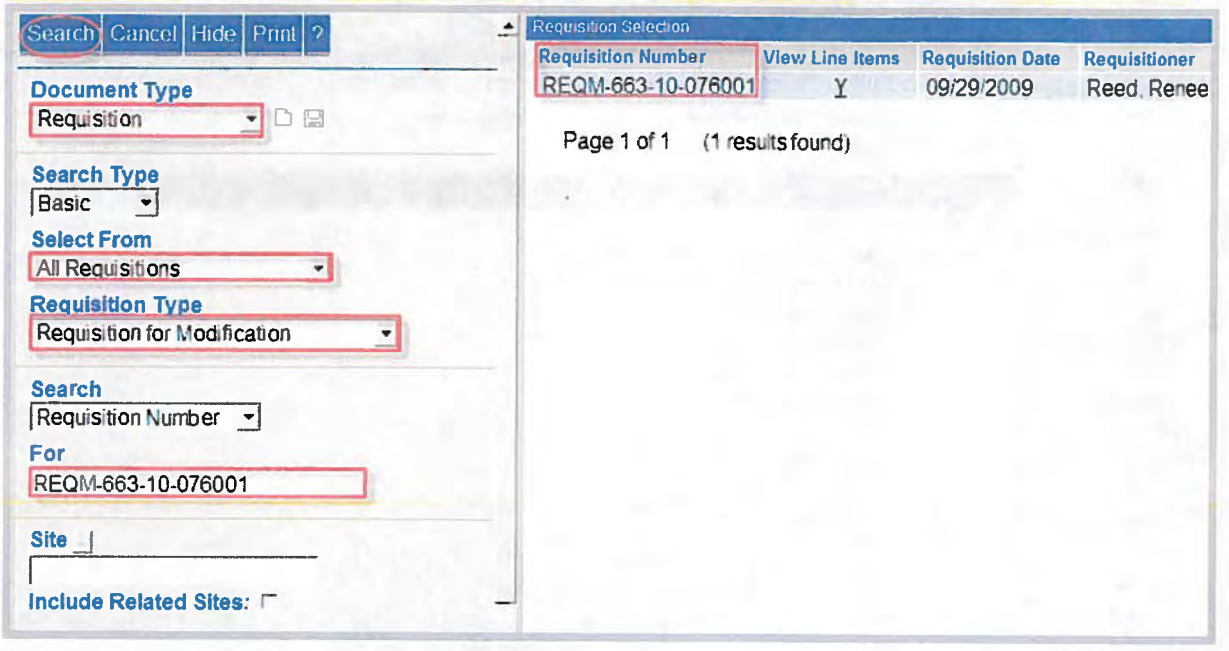


Figure 2: Document Selection Screen

Steps	Section	User Action	Guidance
3.	Document Selection	Complete the following fields: • **Document Type:** Select "Requisition." • **Select From:** Select "All Requisitions." • **Search:** Defaults to "Requisition Number." • **For:** Enter the Requisition for Modification number.	**Select From** will default to "My Requisitions." Change this to "All Requisitions" when searching for requisitions created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
4.	Document Selection	Click the **Search** toolbar button.	
5.	Document Selection	Click the **Requisition Number** link.	

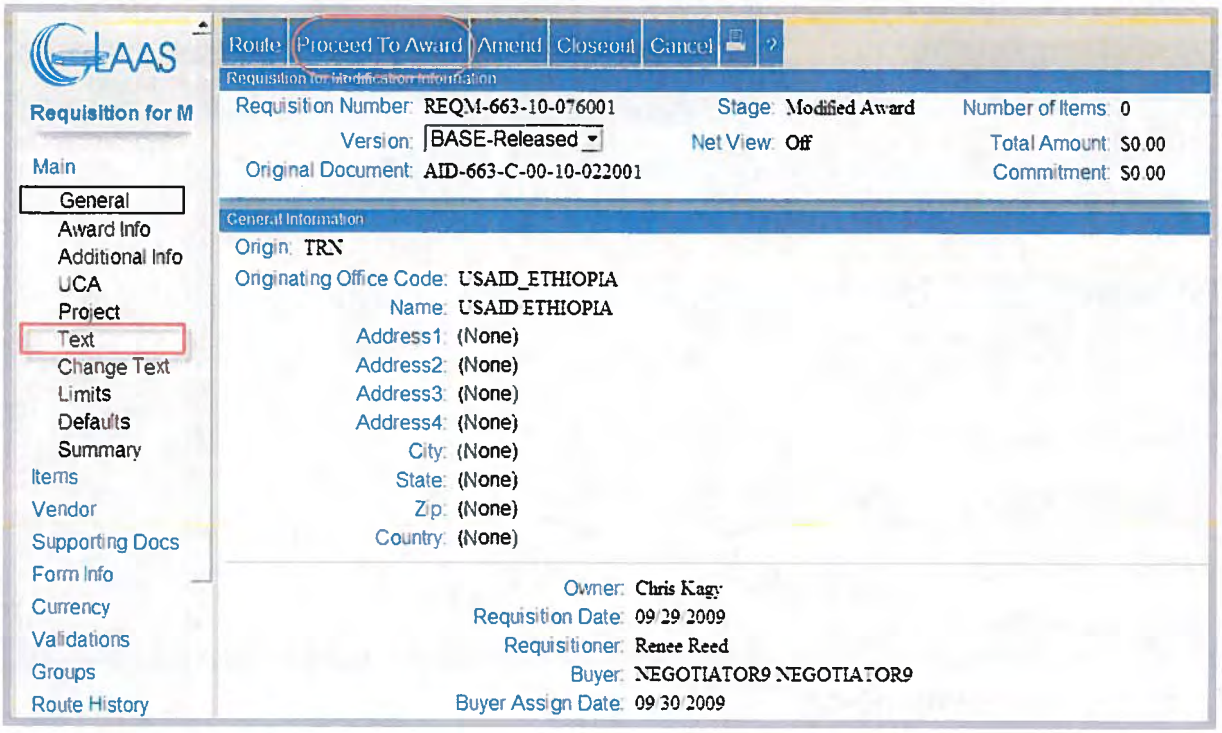


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
6.	Main / General	Review the information for accuracy.	In creating the Requisition for Modification, the Requestor has already entered much of the necessary information. You are reviewing for accuracy.
7.	Main / General	Click the **Text** link on the left-hand menu.	
8.	Main / Text	Review the **Description** and **Header Text** fields (not shown).	**Description** and **Header Text** will contain information concerning the changes to be made in this modification.
9.	Main / Text	Click the **Proceed to Award** toolbar button.	

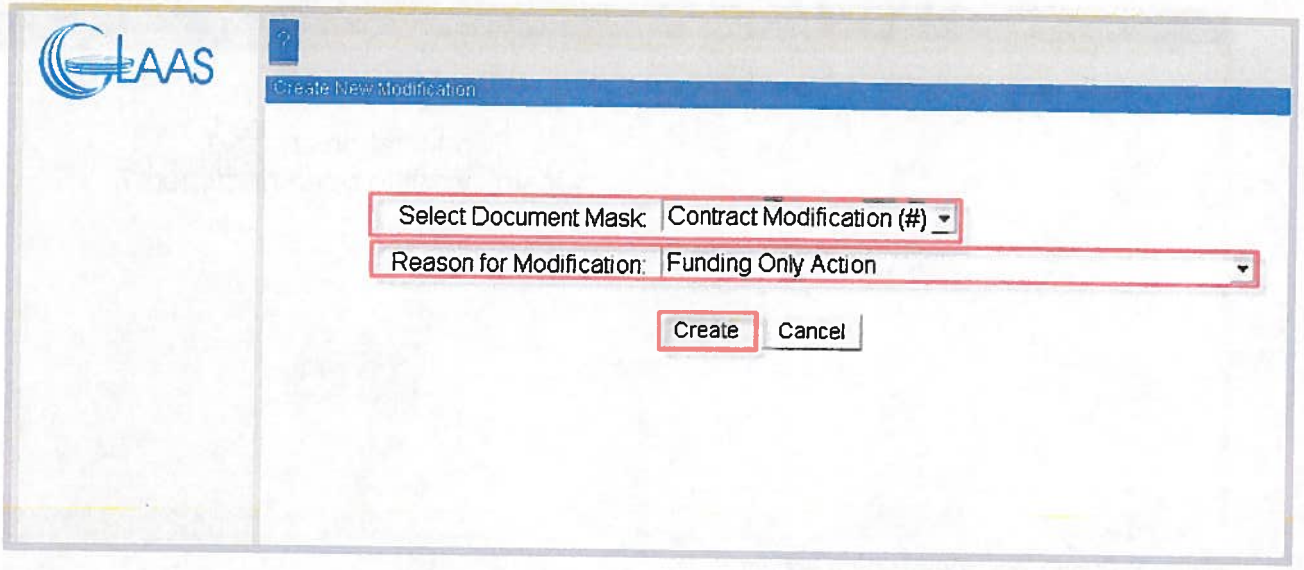


Figure 4: Create New Modification Screen

Steps	Section	User Action	Guidance
10.	Create New Modification	Select the "Contract (or Grant) Modification (#)" **Document Mask**. Select the appropriate **Reason for Modification**.	The **Reason for Modification** selection is transmitted to FPDS-NG for Acquisition Awards. This field does not appear for Assistance Awards.
11.	Create New Modification	Click the **Create** button.	GLAAS processes this Requisition for Modification into an Award modification.

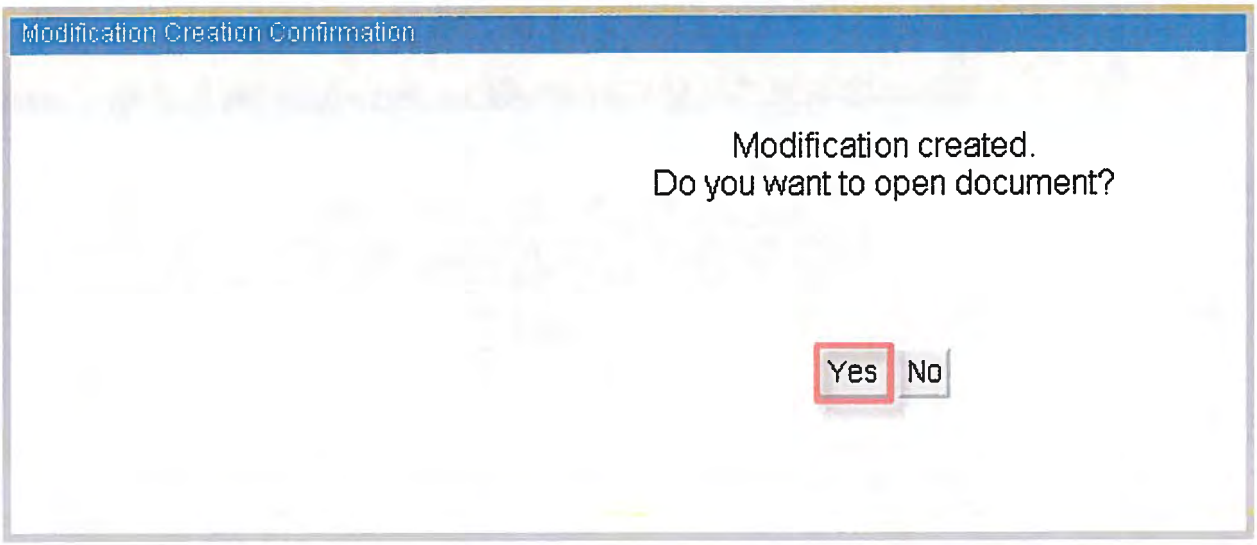


Figure 5: Create New Modification Screen

Steps	Section	User Action	Guidance
12.	Create New Modification	Click the **Yes** button to continue.	

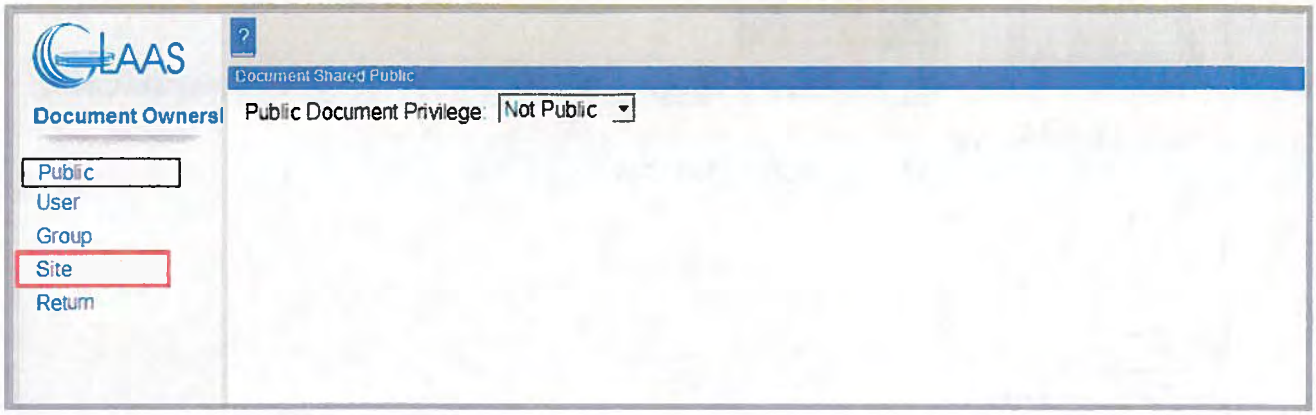


Figure 6: Document Shared Public Screen

Steps	Section	User Action	Guidance
13.	Main / General	Click the **Ownership** link on the left-hand menu (not shown).	While the modification is in process, you must un-share the document with the Admin Office.
14.	Document Shared Public	Click the **Edit** toolbar button (not shown).	
15.	Document Shared Public	Click the **Site** link on the left-hand menu.	

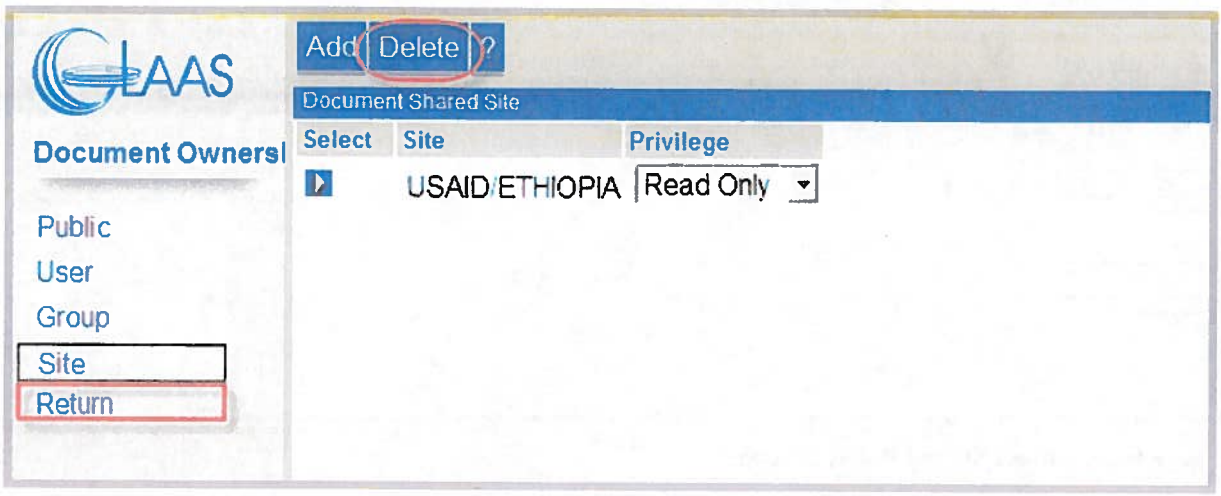


Figure 7: Document Shared Public Screen

Steps	Section	User Action	Guidance
16.	Document Shared Site	Click the **Delete** toolbar button. Click **OK** when asked if you wish to delete the site (not shown).	
17.	Document Shared Site	Click the **Return** link on the left-hand menu.	
18.	Main / Ownership	Click the **Items** link on the left-hand menu (not shown).	

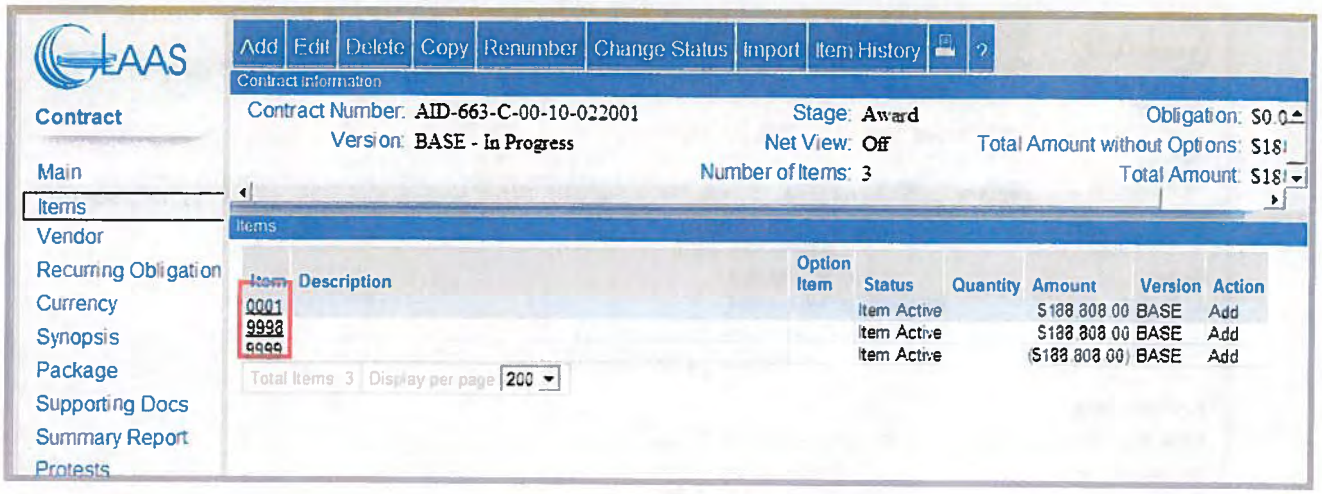


Figure 8: Items Screen

Steps	Section	User Action	Guidance
19.	Items	If this modification is only to reduce the obligation amount and not change the Award TEC and CLIN Estimated Amount, click "9998" under the **Item** column and proceed to **Step 21**. OR Click the **Item** number link of the Award line item in which you want to change the CLIN Estimated Amount.	The "9998" Information Line Item holds the migrated obligated value of the Award. When you need to de-obligate a migrated Award, you must reduce the values on both the "9998" and the "9999" line items. If you do not see any line items, verify that the Award header reads **Net View On**.

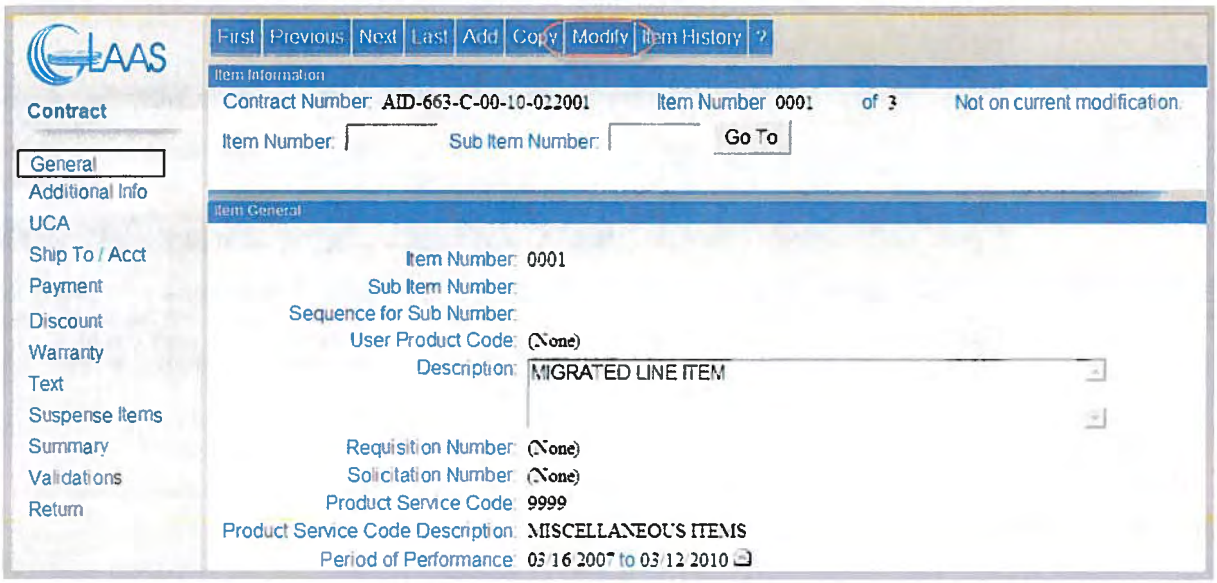


Figure 9: Items / General Screen

Steps	Section	User Action	Guidance
20.	Items / General	Click the **Modify** toolbar button.	

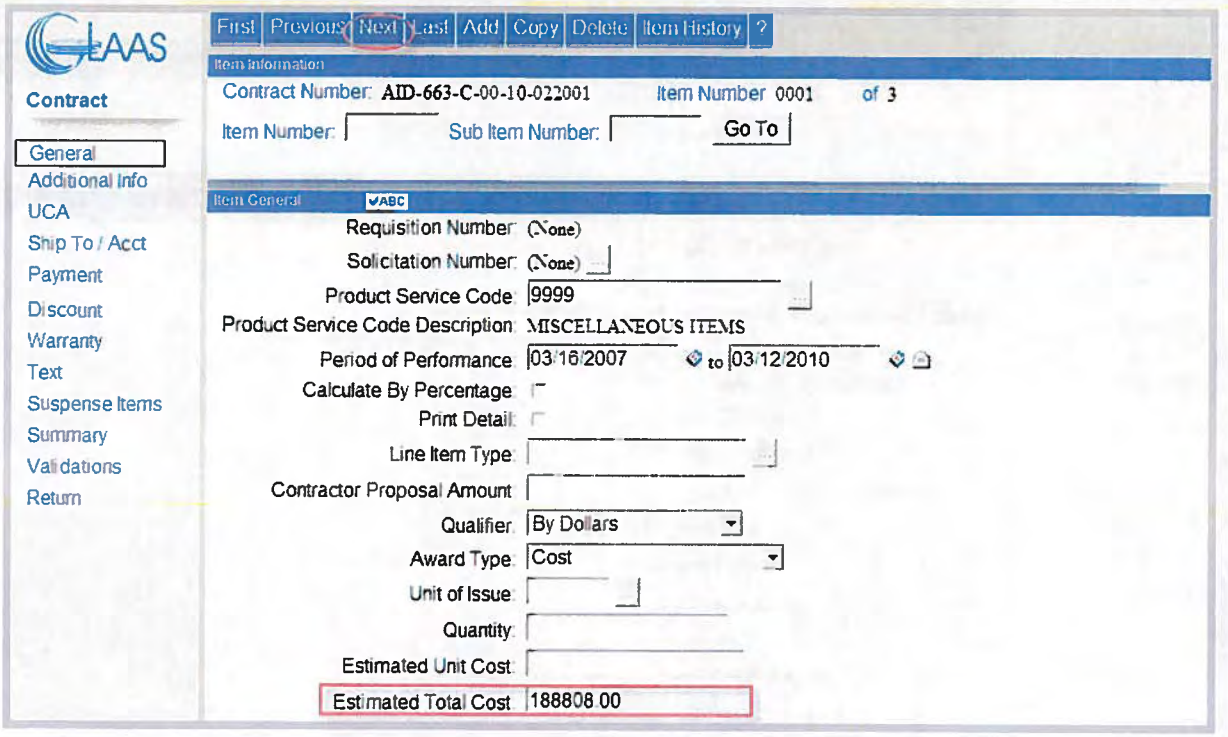


Figure 10: Items / General Screen

Steps	Section	User Action	Guidance
21.	Items / General	If you are changing the CLIN Estimated Amount of an item, the new amount should be entered on the **Items / General** screen.	The field name for the amount may be different based upon the **Award Type** selected here (e.g. **Estimated Total Cost**, **Total Amount**).
22.	Items / General	Click the **Next** toolbar button.	

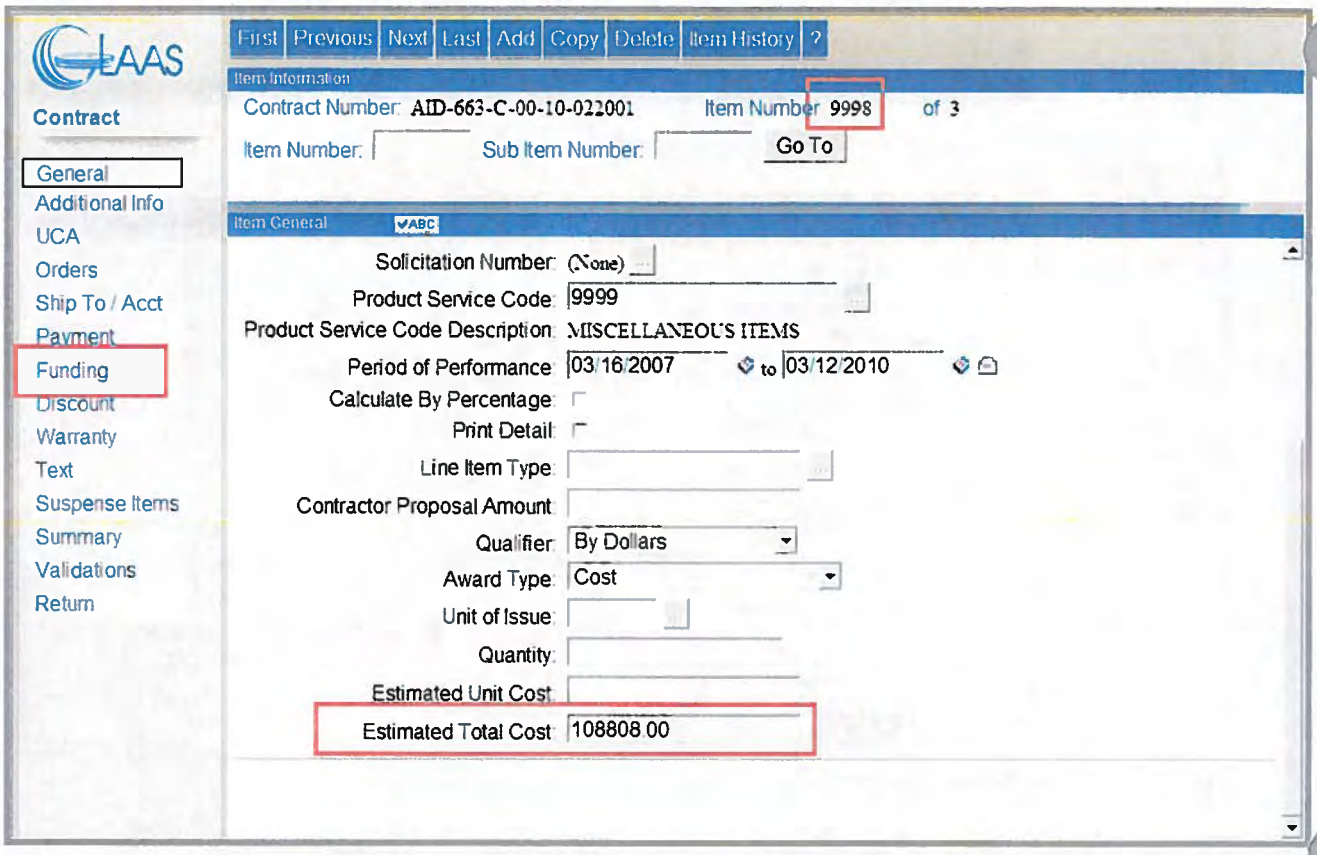


Figure 11: Items / General Screen

Steps	Section	User Action	Guidance
23.	Items / General	Click the **Modify** toolbar button (not shown).	You are now modifying the migrated line item "9998."
24.	Items / General	Enter the new obligation amount (the previously obligated amount minus the amount you need to de-obligate) in the **Estimated Total Cost** field.	The field name for the amount may be different based upon the **Award Type** selected here (e.g. **Estimated Total Cost, Total Amount**).
25.	Items / General	Click the **Funding** link on the left-hand menu.	

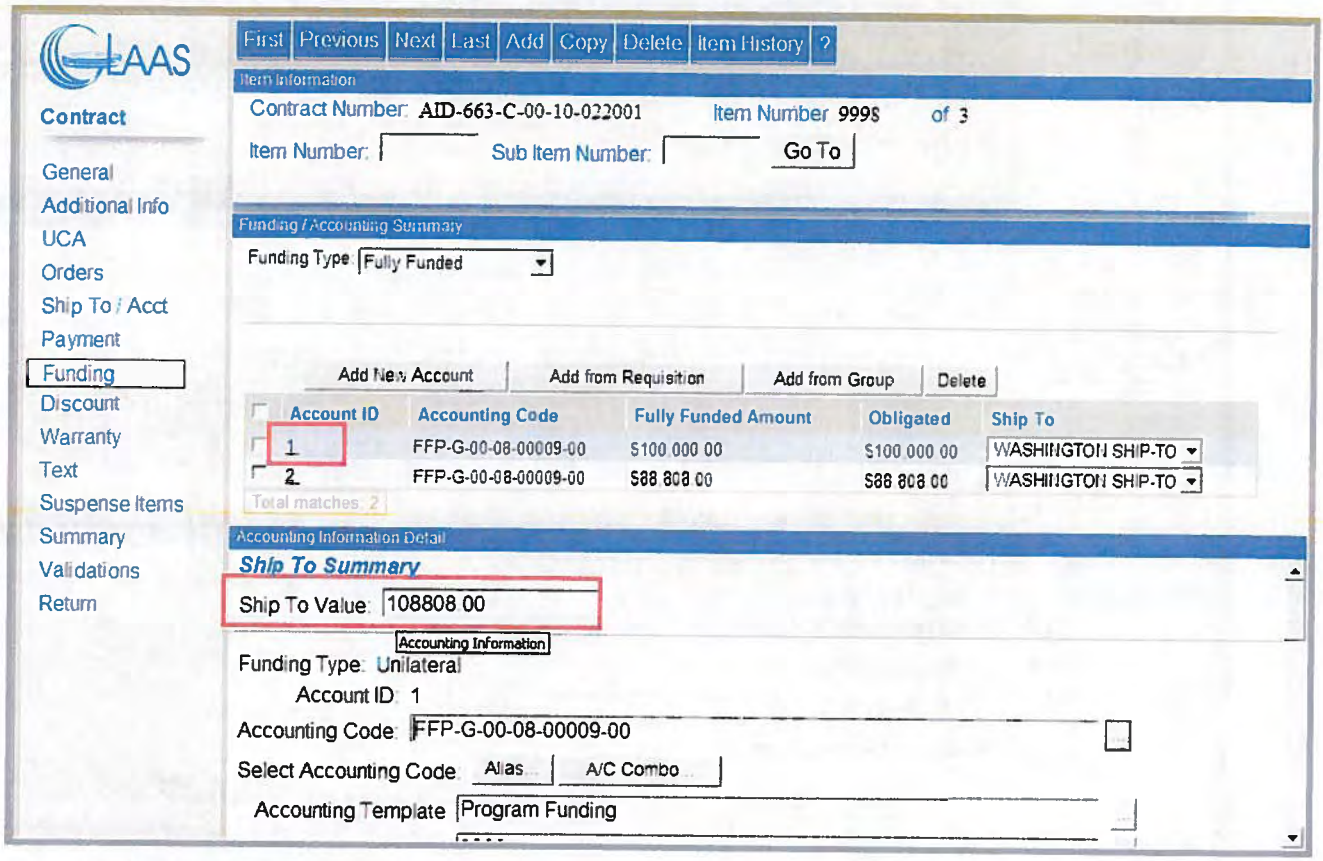


Figure 12: Items / Funding Screen

Steps	Section	User Action	Guidance
26.	Items / Funding	Select the **Account ID** that you want to de-obligate.	
27.	Items / Funding	Enter the new obligation amount (the previously obligated amount minus the amount you need to de-obligate) in the **Ship To Value** field.	This value will be the same as the value you entered on the **Items / General** screen.

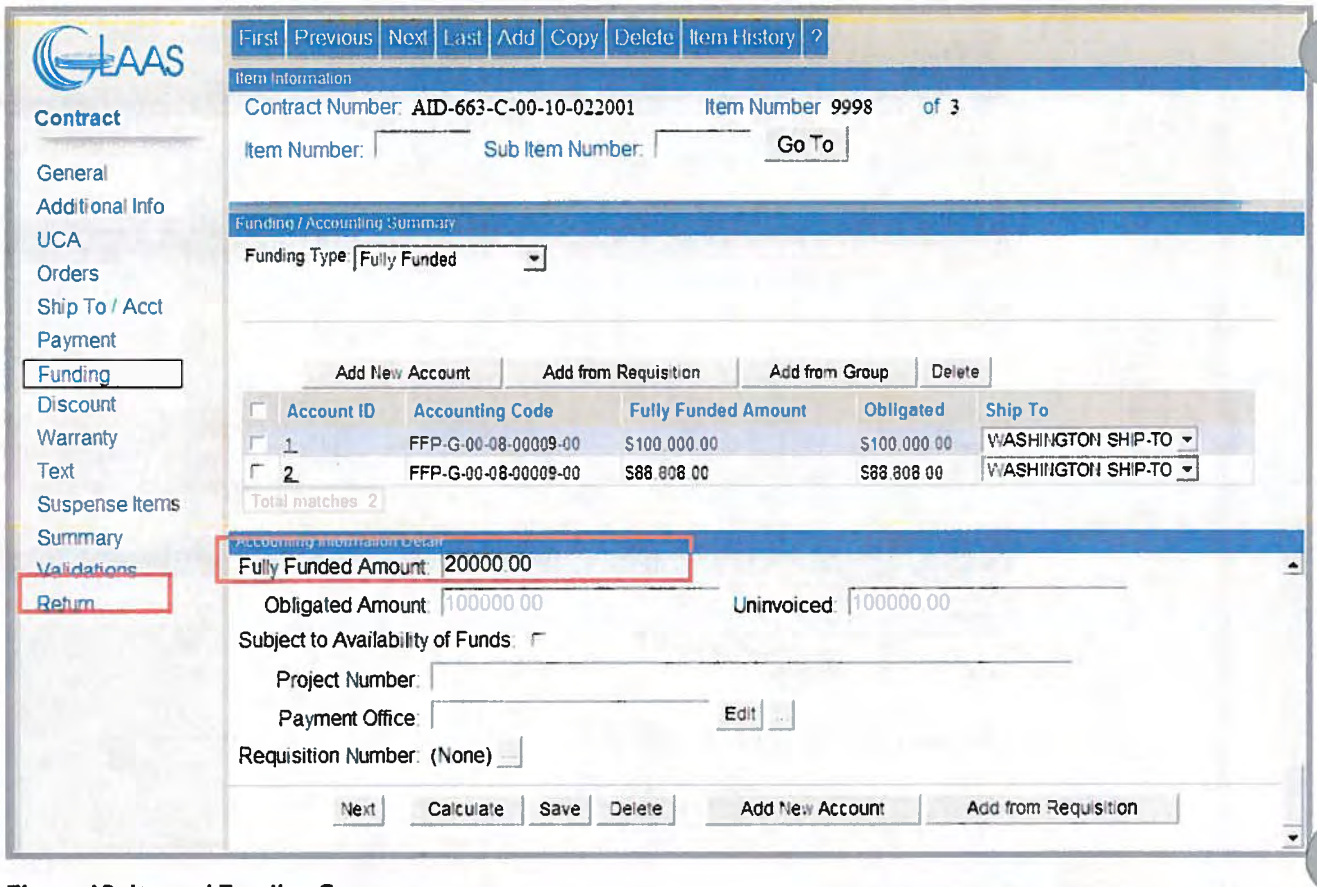


Figure 13: Items / Funding Screen

Steps	Section	User Action	Guidance
28.	Items / Funding	Reduce the **Fully Funded Amount** by the amount you wish to de-obligate on this **Account ID**.	
29.	Items / Funding	Click the **Return** link on the left-hand menu.	
30.	Item	Click the **Item** number "9999" link (not shown).	

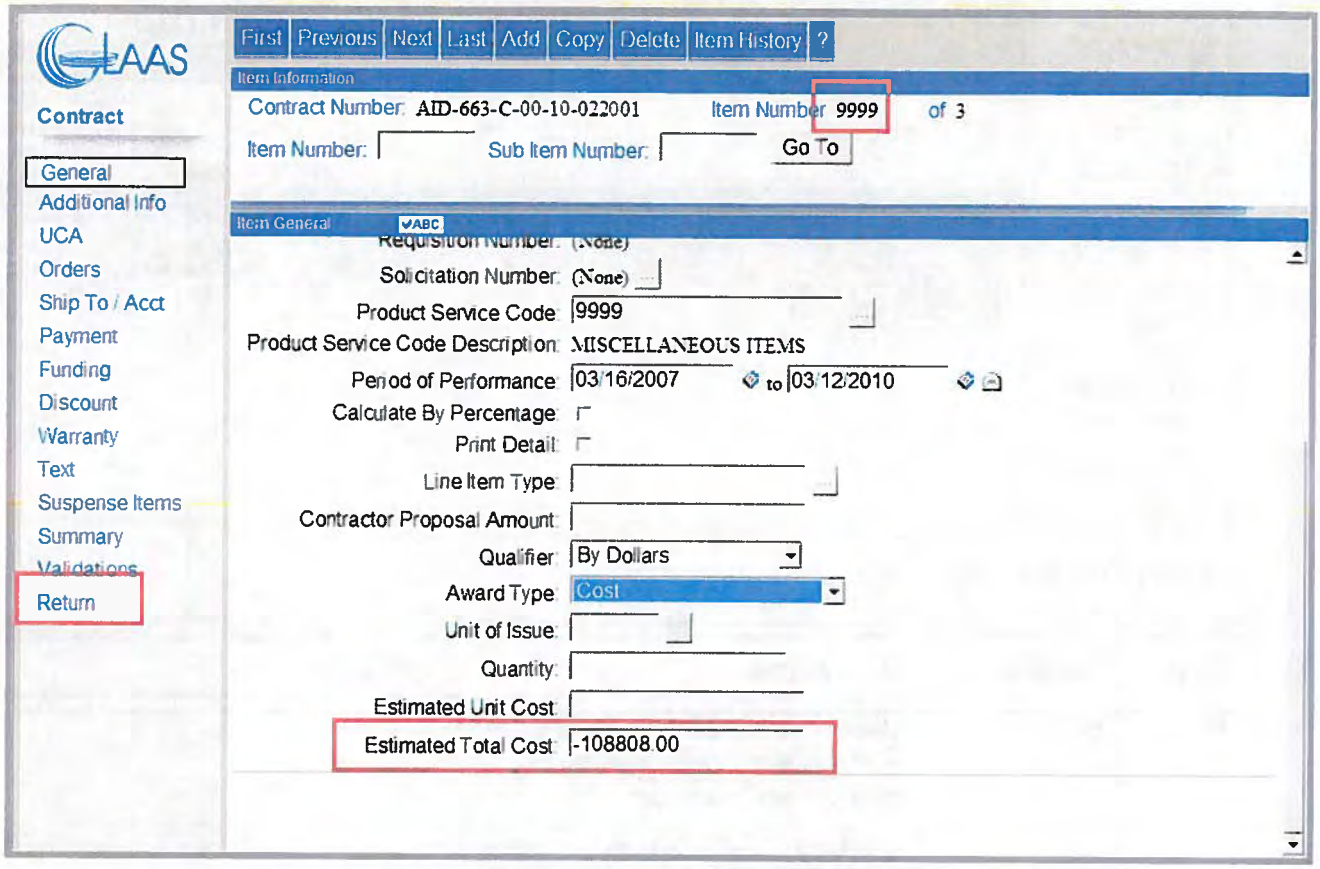


Figure 14: Items / General Screen

Steps	Section	User Action	Guidance
31.	Items / General	Click the **Modify** toolbar button (not shown).	You are now modifying migrated line item "9999."
32.	Items / General	Enter the negative value of the value you entered in the **Ship To Value** field of **Step 25** into the **Estimated Total Cost** field.	The field name for the amount may be different based upon the **Award Type** selected here (e.g. **Estimated Total Cost**, **Total Amount**).
33.	Items / General	Click the **Return** link on the left-hand menu.	

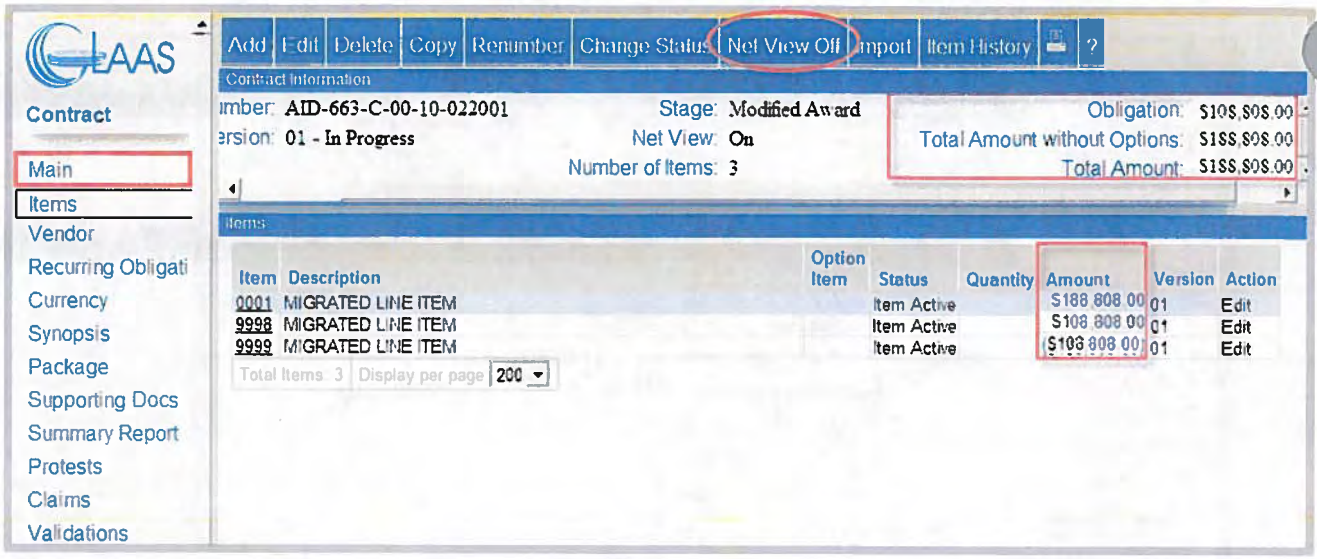


Figure 15: Items Screen

Steps	Section	User Action	Guidance
34.	Items	Verify that the **Obligation** amount in the award header reflects the new obligated amount. Verify that the **Amounts** for "9998" and "9999" are the inverse of one another. To view what has been de-obligated on just this modification, click the **Net View Off** toolbar button.	
35.	Items	Click the **Main** link on the left-hand menu.	
36.	Main / General	Click the **Change Text** link on the left-hand menu (not shown).	

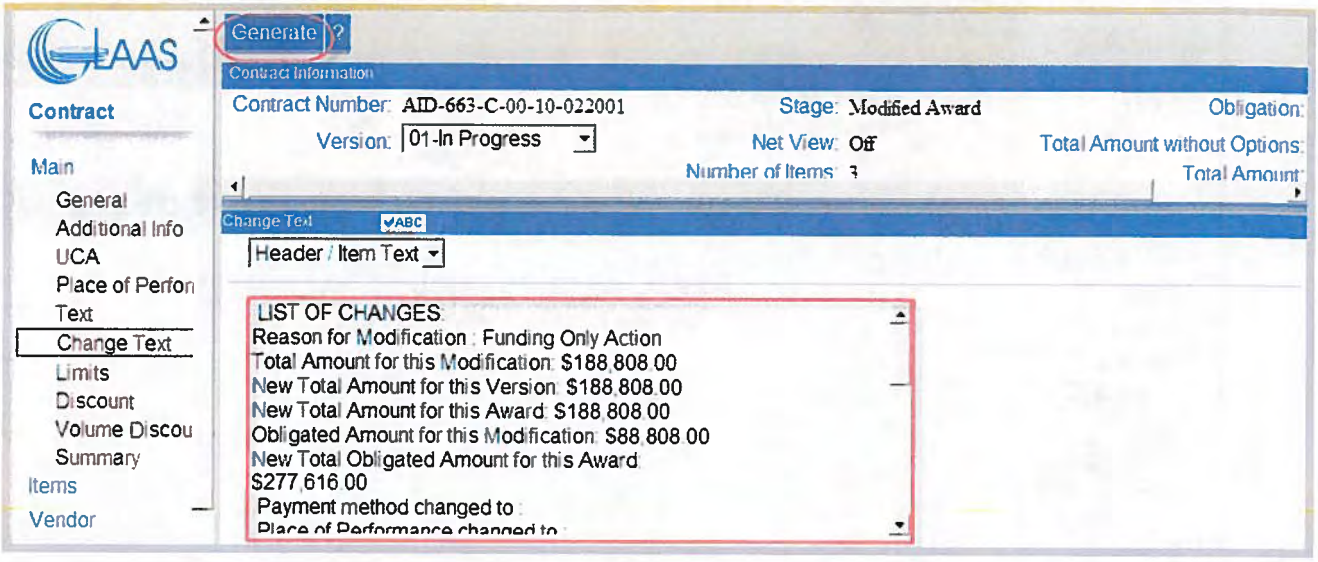


Figure 16: Change Text Screen

Steps	Section	User Action	Guidance
37.	Main / Change Text	Click the **Generate** toolbar button. OR Manually enter the purpose of this modification.	Clicking the **Generate** toolbar button will produce a system-generated list of all the fields that have changed on this modification. You can use the **Generate** toolbar button, manually enter your own text, or edit the system-generated text.
38.	Main / Change Text	Verify that the changes that will be made to this Award appear in the text field.	Any text in this box will display on your Standard Form for this modification. Delete any text that you do not want on your form.
39.	Main / Change Text	Click the **Package** link on the left-hand menu (not shown).	

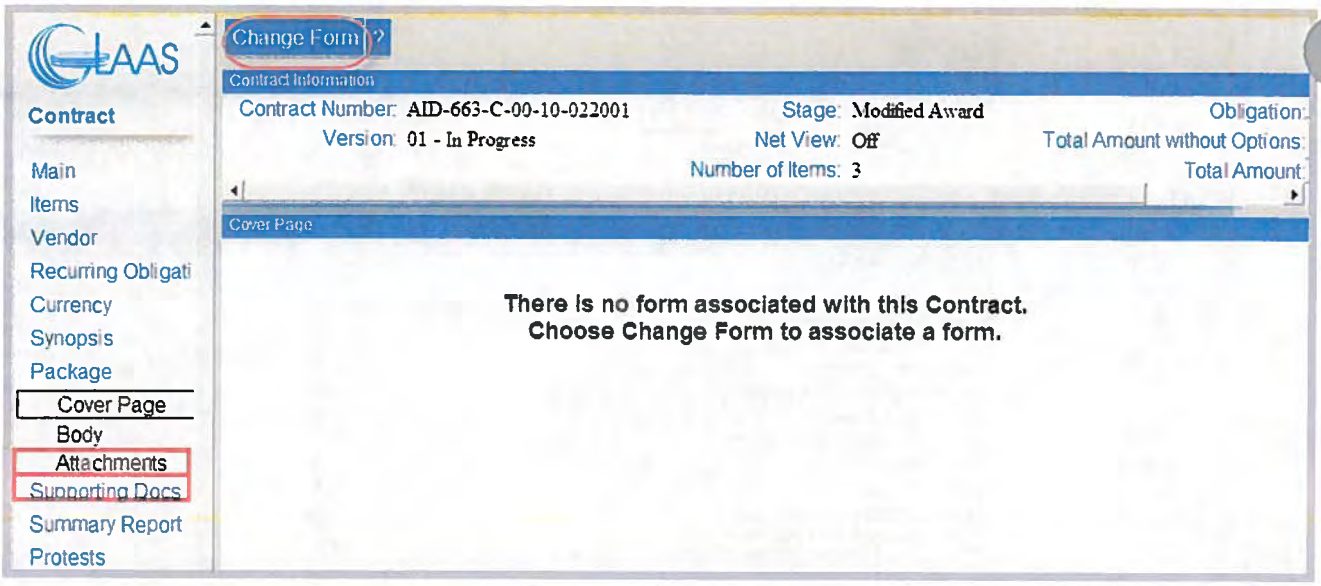


Figure 17: Package / Cover Page Screen

Steps	Section	User Action	Guidance
40.	Package / Cover Page	If you are working on a Contract modification, click the **Change Form** toolbar button. OR If you are modifying an Assistance Award, do not use the GLAAS Cover Page. Instead, click the **Attachments** link on the left-hand menu, add the Assistance modification form located in the GLAAS Library (not shown) and skip to **Step 41**.	Upload any documentation relating to the modification under the **Attachments** or **Supporting Docs** screens. Refer to the *Adding Attachments and Supporting Documentation* user guide for more information.
41.	Package / Cover Page	Select the "SF 30 – Modification of Contract" form (not shown).	

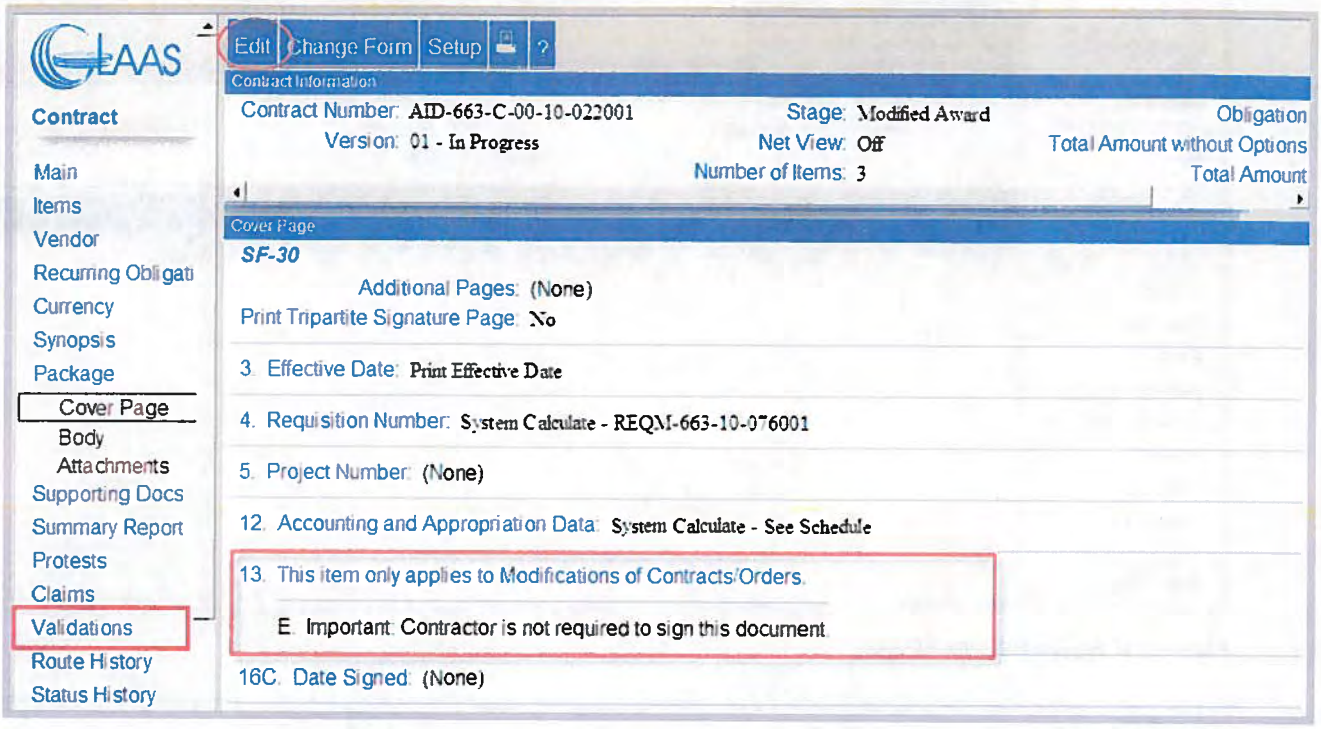


Figure 18: Package / Cover Page Screen

Steps	Section	User Action	Guidance
42.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the **Cover Page**. If you do not edit block 13 you will receive an **Error Message** when you validate this Award in GLAAS. Click the **Submit** button (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
43.	Package / Cover Page	Click the **Validations** link on the left-hand menu. Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages** for this particular line item (not shown). **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
44.	Validations	Click the **Main** link on the left-hand menu (not shown).	

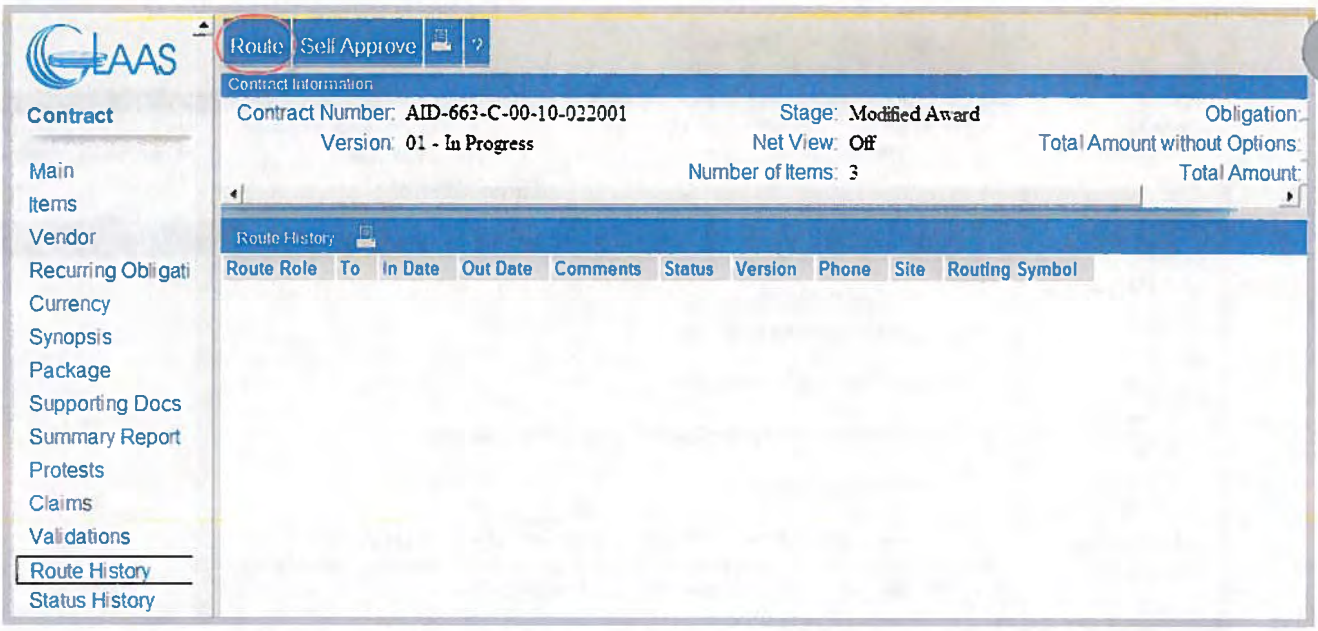


Figure 19: Route History Screen

Steps	Section	User Action	Guidance
45.	Main / General	Click the **FPDS** (Acquisition) or **FAADS** (Assistance) toolbar button (not shown). Update the FPDS-NG or FAADS record prior to routing and approving the Award modification (not shown).	Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for more information.
46.	Main / General	Click the **Route History** link on the left-hand menu (not shown).	
47.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for "Approval" to the Contracting/Agreement Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
48.	Route History	Click the **Return to Home** link on the left-hand menu (not shown).	

After the Modification has been approved and released by the CO/AO, open the Award and complete the following steps giving the Admin Office access to the Award.

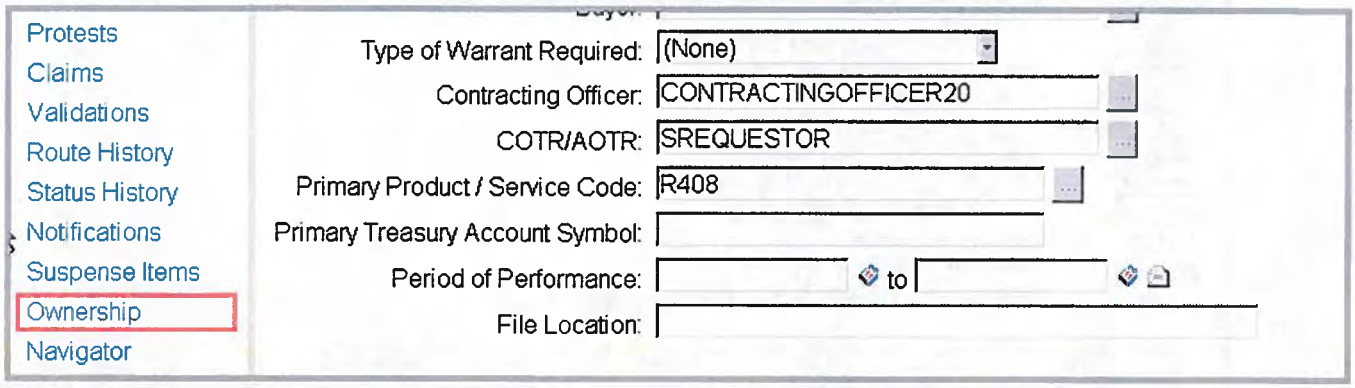


Figure 20: Main / General Screen

Steps	Section	User Action	Guidance
49.	Main / General	Click the **Ownership** link on the left-hand menu.	
50.	Share Document	Click the **Edit** toolbar button (not shown).	

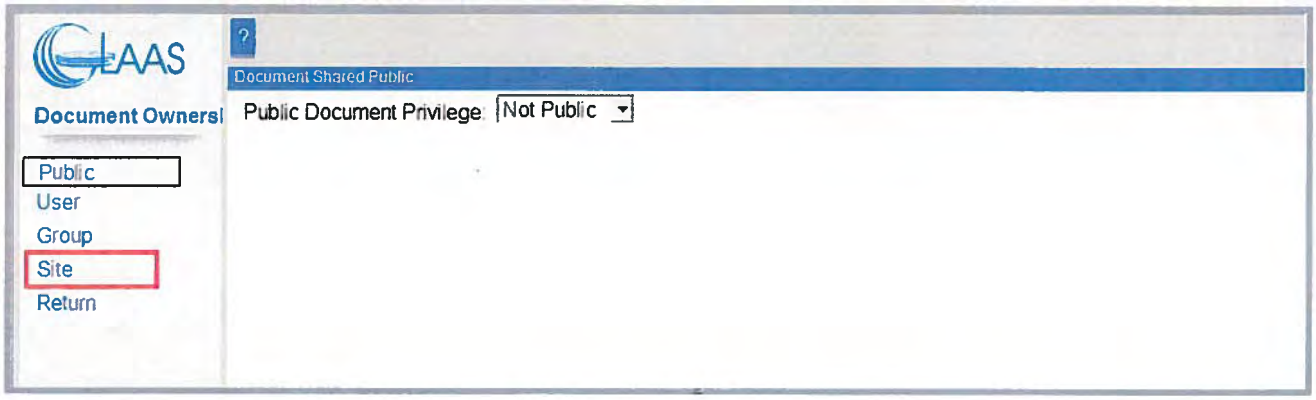


Figure 21: Document Shared Public Screen

Steps	Section	User Action	Guidance
51.	Document Shared Public	Click the **Site** link on the left-hand menu	
52.	Document Shared Site	Click the **Add** toolbar button (not shown).	

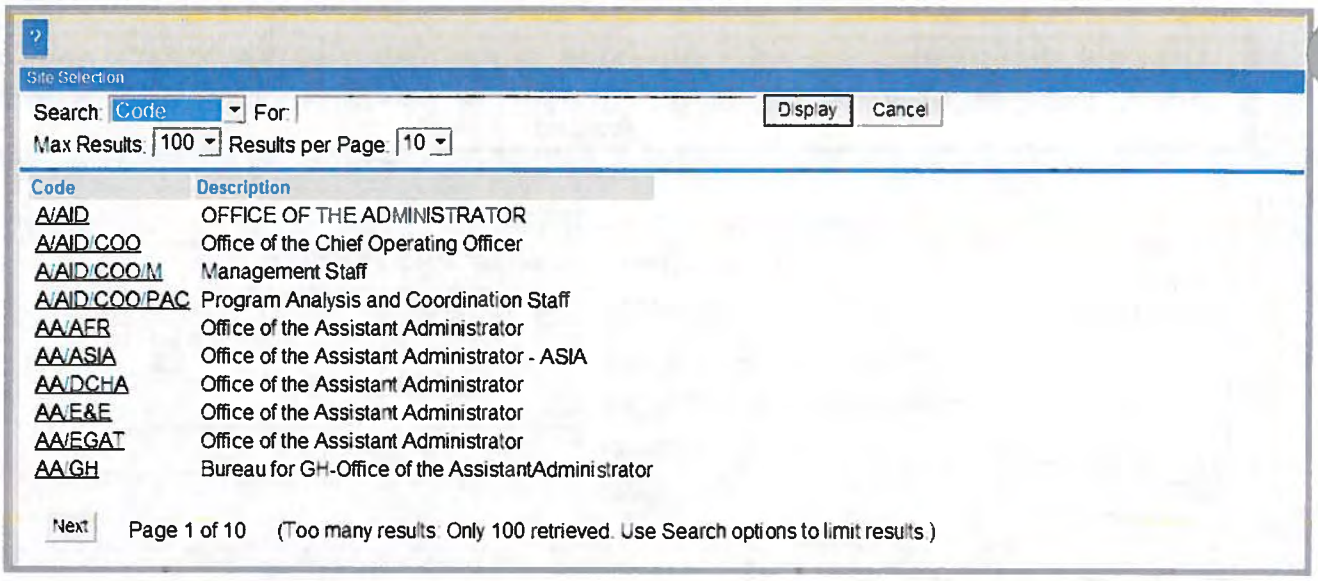


Figure 22: Site Selection Screen

Steps	Section	User Action	Guidance
53.	Site Selection	Search for and select the site of the COTR or AOTR.	This is the same as the **Admin Office** on the **Main / General** screen.

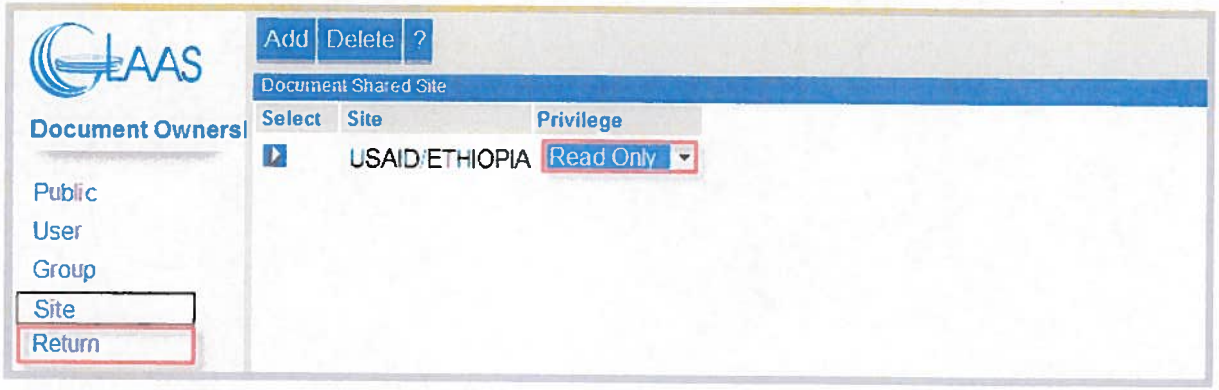


Figure 23: Document Shared Site Screen

Steps	Section	User Action	Guidance
54.	Document Shared Site	Ensure the **Privilege** is Read Only.	This will allow the Admin Office to view the released award, and access it to create modifications and BPA Calls.
55.	Document Shared Site	Click the **Return** link on the left-hand menu.	
56.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

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GLAAS 102: Additional Award Types

November 2009

Additional Award Types Objectives

- At the end of this topic, you will know how to create:
  - Inter-Agency Agreements (IAA)
  - Single-award Indefinite Quantity Contracts (IQC)
  - Delivery/Task Orders against a single-award IQC
  - Blanket Purchase Agreements
  - Associate Awards

Award Instrument Types

Code	Instrument Type	Document Type
B	Basic Ordering Agreement	Contract
C	Contract	Contract
D	Definitive Quantity Agreement	Contract
I	Indefinite Quantity Agreement	Contract
S	Personal Services Contract	Contract
Q	Requirements Contract	Contract
Z	Ribbon Contract (Buy-In)	Contract
BC	Blanket Purchase Agreement Call	BPA Call
E	Blanket Purchase Agreement Setup	BPA Setup
W	DO Against USAID IQC	Delivery Order
M	GSA Schedule Order	Delivery Order
N	Other Federal Schedule Order	Delivery Order

Award Instrument Types (cont)

Code	Instrument Type	Document Type
T	Participating Agency Program	IAA
P	Participating Agency Service Program	IAA
R	Resource Support Services	IAA
X	Ribbon PASA	IAA
V	Purchase Card Order	Purchase Card Order/Purchase Order
O	Purchase Order	Purchase Order
A	Cooperative Agreement	Grant
G	Grant	Grant
LA	Leader with Associate Award	Grant
L	Associate Award	Grant

Creating an Inter-Agency Agreement (IAA)

- Creating an Inter-Agency Agreement (PAPA, PASA or RASA) is like creating a regular GLAAS Contract, except you:
  - Use the GLAAS Document Type: "IAA"
  - Select a numbering mask based on the instrument type
  - Select an Agency instead of a Vendor
  - Upload the agreement document instead of using GLAAS to build the IAA language

IAA

AID-623-P-07-00001

USDA

Creating a Indefinite Quantity Contract (IQC)

- Creating an IQC is like creating a regular Contract, except you:
  - Use a different numbering mask
  - Can create an overall and per-order limit

IQC

AID-IRM-I-07-00001

GovConnection Inc

Special Instructions for IQCs

- Never check the Report to FPDS as a Stand-alone Contract box

Report to FPDS as a Stand-alone Contract: ☐

- If you do, GLAAS will not allow you to create Delivery and Task Orders against this IQC

Special Instructions for IQCs

- You must set up each IQC line item to accept Delivery and Task Orders
- On the Orders screen, select:
  - Allow Delivery/Task Orders - Yes
  - Delivery/Task Order Obligates

Allow Delivery / Task Orders? ◉ Yes ○ No

◉ Delivery / Task Order Obligates ○ Contract Obligates

- You can define minimum/maximum amounts per order, if applicable

Creating a DO/TO for an IQC

- When creating a Delivery / Task Order (DO/TO), you will:
  - Reference the IQC when you create a DO/TO
  - Copy the clause language from the IQC
  - Create a non-competitive IQC from a Requisition for DO/TO
  - Create a competitive IQC from a Requisition

Creating a Blanket Purchase Agreement (BPA)

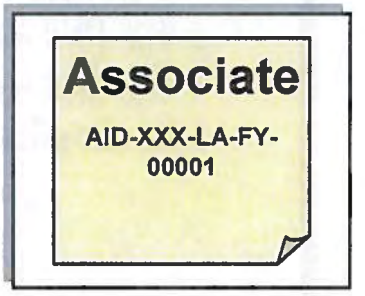
- Creating a Blanket Purchase Agreement is like creating a regular Contract, except:
  - The initial BPA (the "BPA Setup") is created from an unfunded Requisition
  - The BPA Setup has no line items
  - The BPA has overall and per-order limits
  - All obligations are done with BPA Calls

Creating a Blanket Purchase Agreement Call

- Creating a BPA Call is similar to creating a Delivery or Task Order, except:
  - You reference the BPA when you create a BPA Call
  - You copy the clause language from the BPA
  - Unlike a Delivery/Task Order, you can vary your line items between BPA Calls
    - Delivery/Task Order lines are copied from the IQC
    - BPA Call lines are copied from the Requisition

Creating an Associate Award

- Creating an Associate Award is like creating any other assistance award, except you:
  - Select the Numbering Mask applicable to an Associate Award
  - Identify the Leader Award Number in the USAID flex field



GLAAS 102 USER GUIDE:

CREATING A COMPETITIVE INDEFINITE QUANTITY CONTRACT (IQC)

PURPOSE:

This user guide will show you how to create an Indefinite Quantity Contract (IQC) in GLAAS. When creating an IQC in GLAAS it is critical to not select "Yes" for **Report to FPDS as a Stand-Alone Contract**. If you select this option the system will not allow you to issue Delivery / Task Orders against the Contract.

BEFORE STARTING:

1. To create an IQC, you must be an A&A Specialist or a Contracting/Agreement Officer.
2. To approve or release an IQC, you must be a Contracting/Agreement Officer.
3. A Milestone Plan has been created and linked to the Requisition for the IQC.
4. A "Released" Solicitation exists in GLAAS.

NOTES:

The process for creating an IQC in GLAAS is largely the same as the process used to create a Contract. This user guide will only highlight the differences between creating an IQC and creating a Contract. The *Creating a Contract from a Requisition* user guide contains a full walkthrough on how to create a Contract in GLAAS. The example screen shots in this user guide will show creating an IQC from a Solicitation.

STEPS:

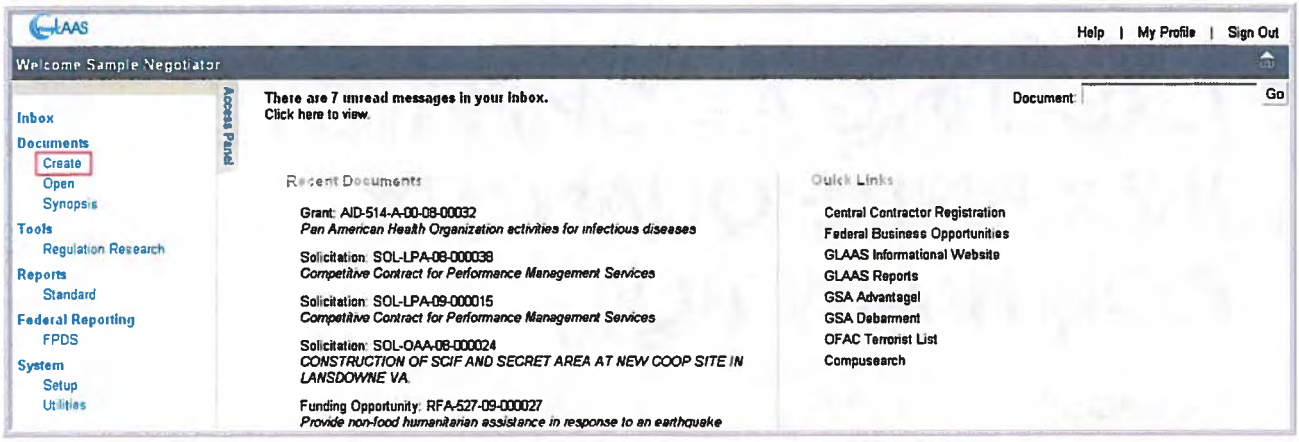


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

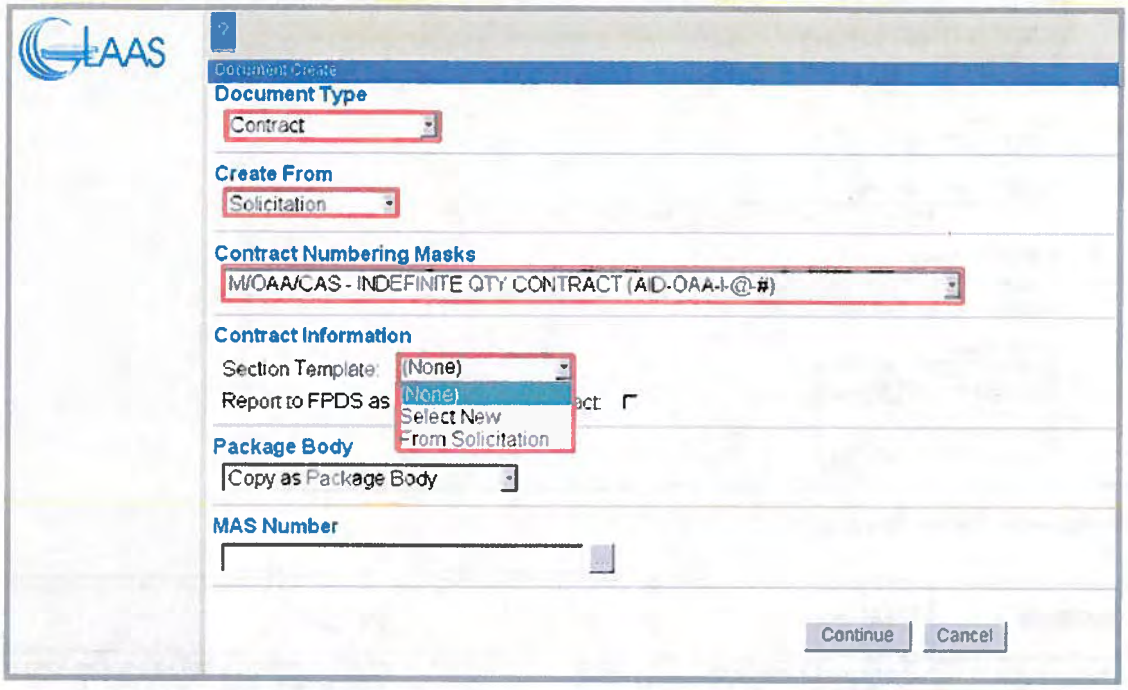


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "Contract." • **Create From:** Select "Solicitation." • **Contract Numbering Mask:** Select "Indefinitive QTY Contract" (AID-Site-I-@-#). • **Section Template:** Select "Select New" to load a clause template now or select "None" to add a template later. • **Report to FPDS as a Stand-alone Contract:** Never check this box when you are creating an IQC. If you do, you will be unable to issue Delivery/Task Orders against this Contract.	Refer to the *Creating a Contract from a Requisition* user guide if you are creating an ICQ from a Requisition without a Solicitation. If you want the Contract to use the same clauses as the Solicitation, but include updated versions, select "From Solicitation" for **Section Template.** All awards over $3,000 will be reported to FPDS-NG (but not as Stand-Alone Contracts).

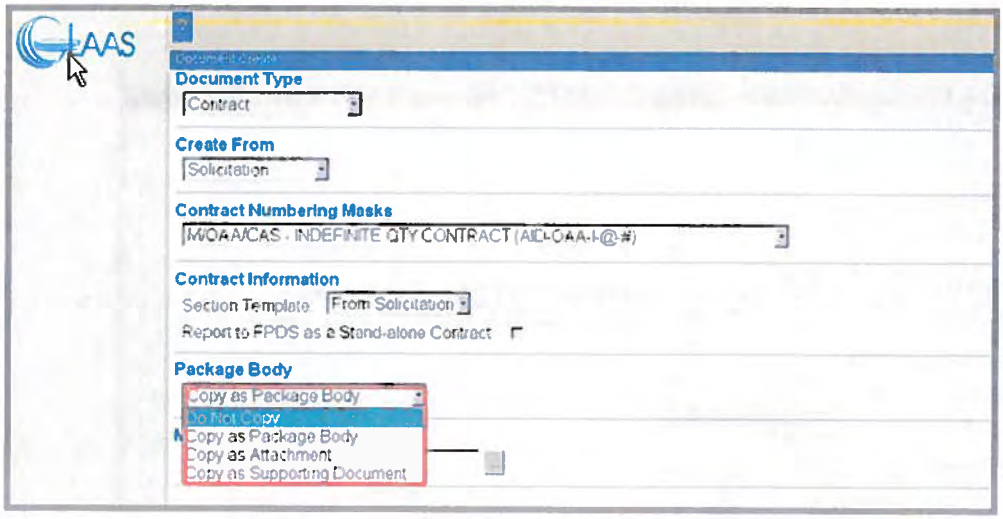
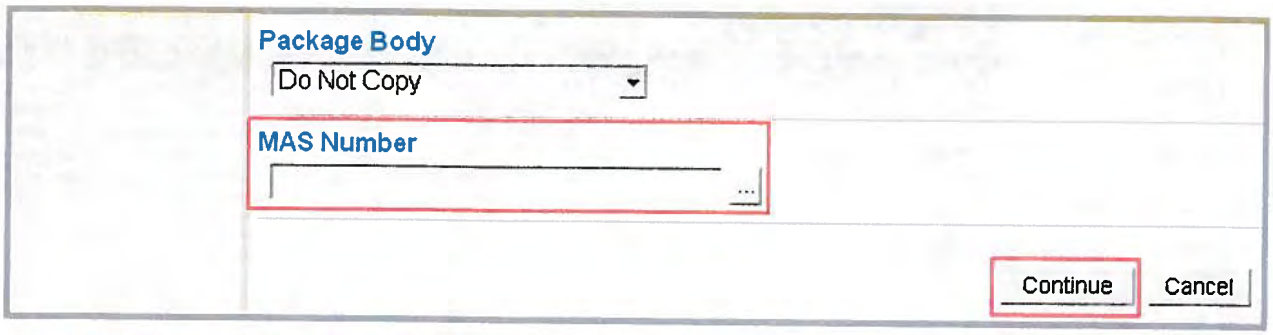


Figure 3: Document Create Screen

Steps	Section	User Action	Guidance
3. cont.	Document Create	Complete the following field: • **Package Body:** Select the appropriate option based upon the need for this IQC.	There are four **Package Body** options to choose from: • "Do Not Copy" – The package from the Solicitation is not copied. • "Copy as Package Body" – The package from the Solicitation is copied over as the Contract body. • "Copy as Attachment" – The package from the Solicitation is copied over as an Attachment. • "Copy as Supporting Document" – The package from the Solicitation is copied over as a Supporting document. If you want the clauses to match exactly as they were in the Solicitation, select "None" for **Section Template** and then select "Copy as Package Body" for **Package Body**.



Steps	Section	User Action	Guidance
3. cont.	Document Create	Complete the following field: • **MAS Number:** Select the appropriate MAS number if this IQC is under a Shared Ceiling.	IQC's under a Shared Ceiling must be linked to the **MAS Number** and line item. This is the only page that you can link a Contract to a MAS document. If you fail to link the document here, you will have to delete the current award and start over.
4.	Document Create	Click the **Continue** button.	

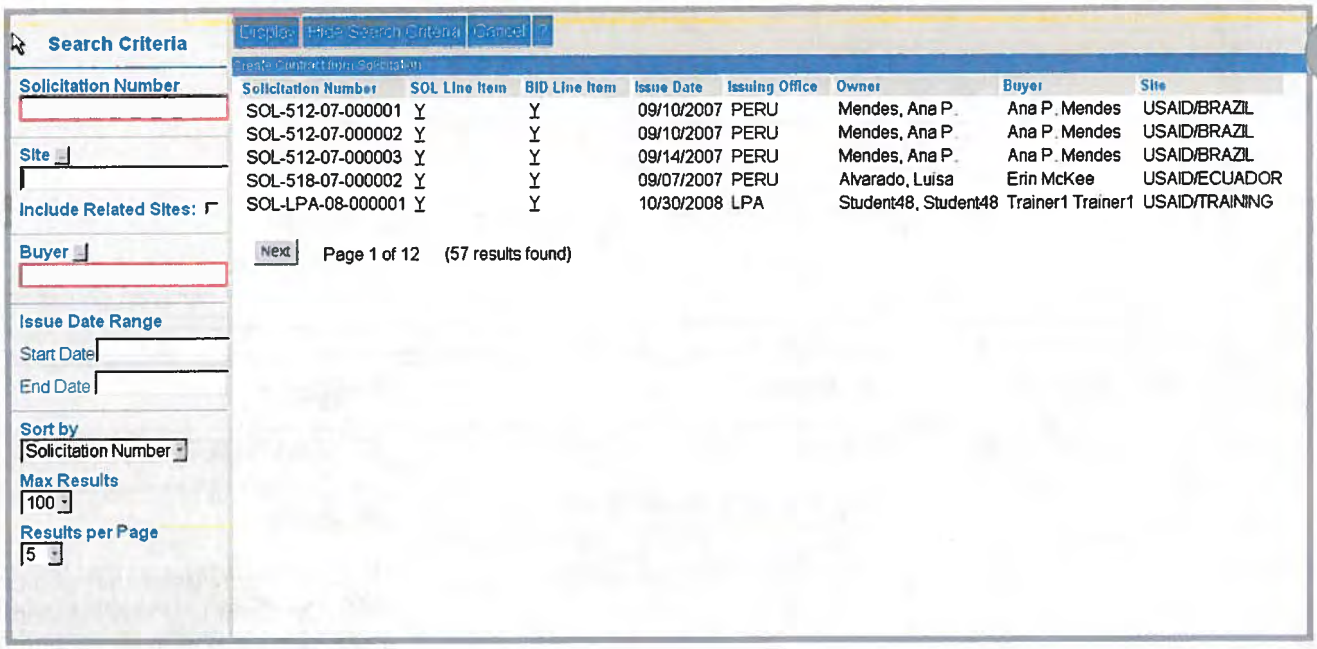


Figure 4: Create Contract from Solicitation Screen

Steps	Section	User Action	Guidance
5.	Create Contract from Solicitation	Search for a Solicitation using one or more of the following fields: • **Solicitation Number** • **Buyer** Click the **Display** toolbar button.	Only Solicitations with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (**%**) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.

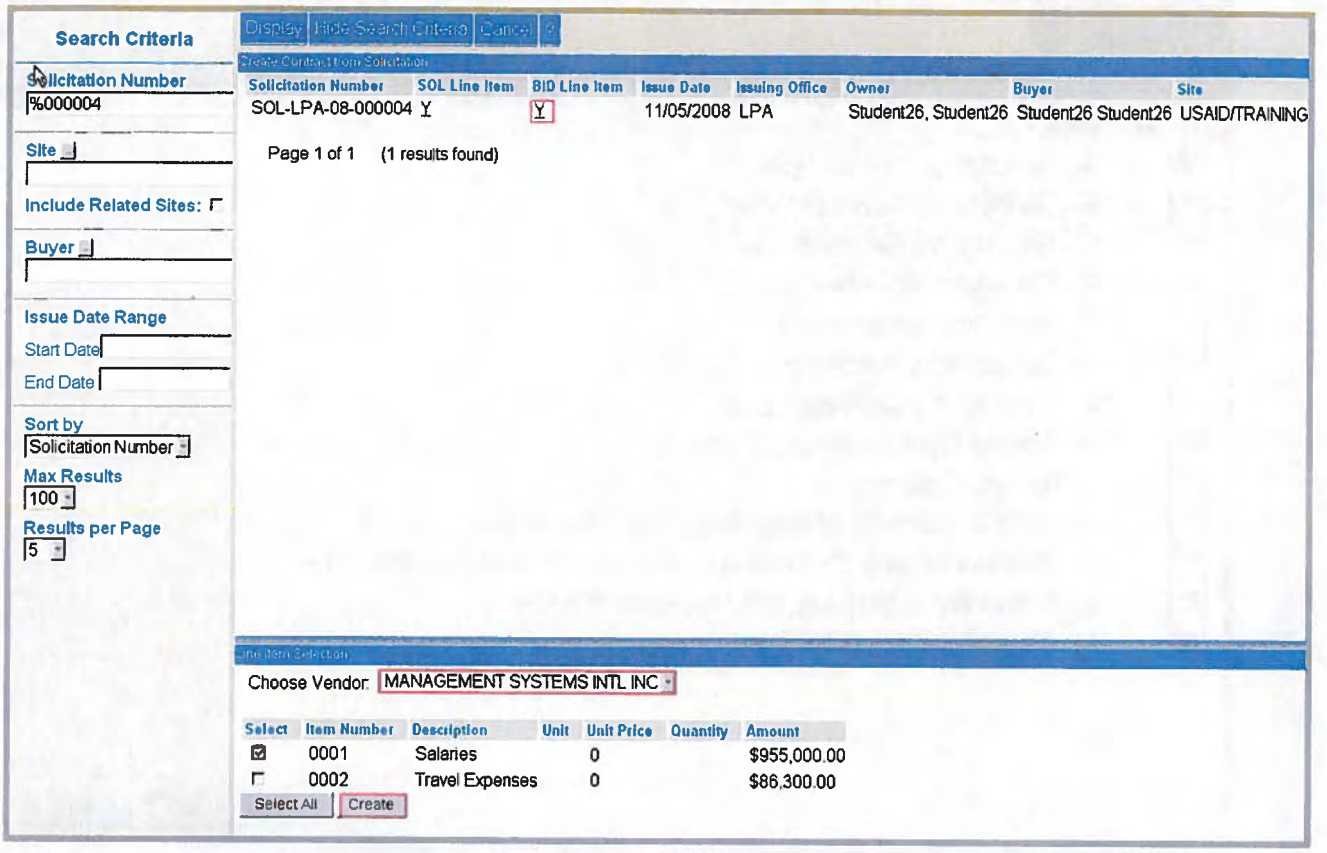


Figure 5: Create Contract from Solicitation Screen

Steps	Section	User Action	Guidance
6.	Create Contract from Solicitation	Click the **Y** link in the **BID Line Items** column to select a Bidder from the Solicitation. Select the winning **Bidder**. Select one or more line items to pull forward from the Solicitation into the Contract.	A list of **Bidders** will appear at the bottom of the screen. If you select **BID Line Items**, and then choose the **Bidder**, the bid amounts from that Vendor's Responses will appear for selection (shown). OR If you select **SOL Line Items**, and then select the appropriate line items at the bottom of the page, the system will only carry forward the estimated line items from the Solicitation (not shown). Choosing **SOL Line Items** will require you to enter Vendor information on the award.
7.	Create Contract from Solicitation	Click the **Create** button.	

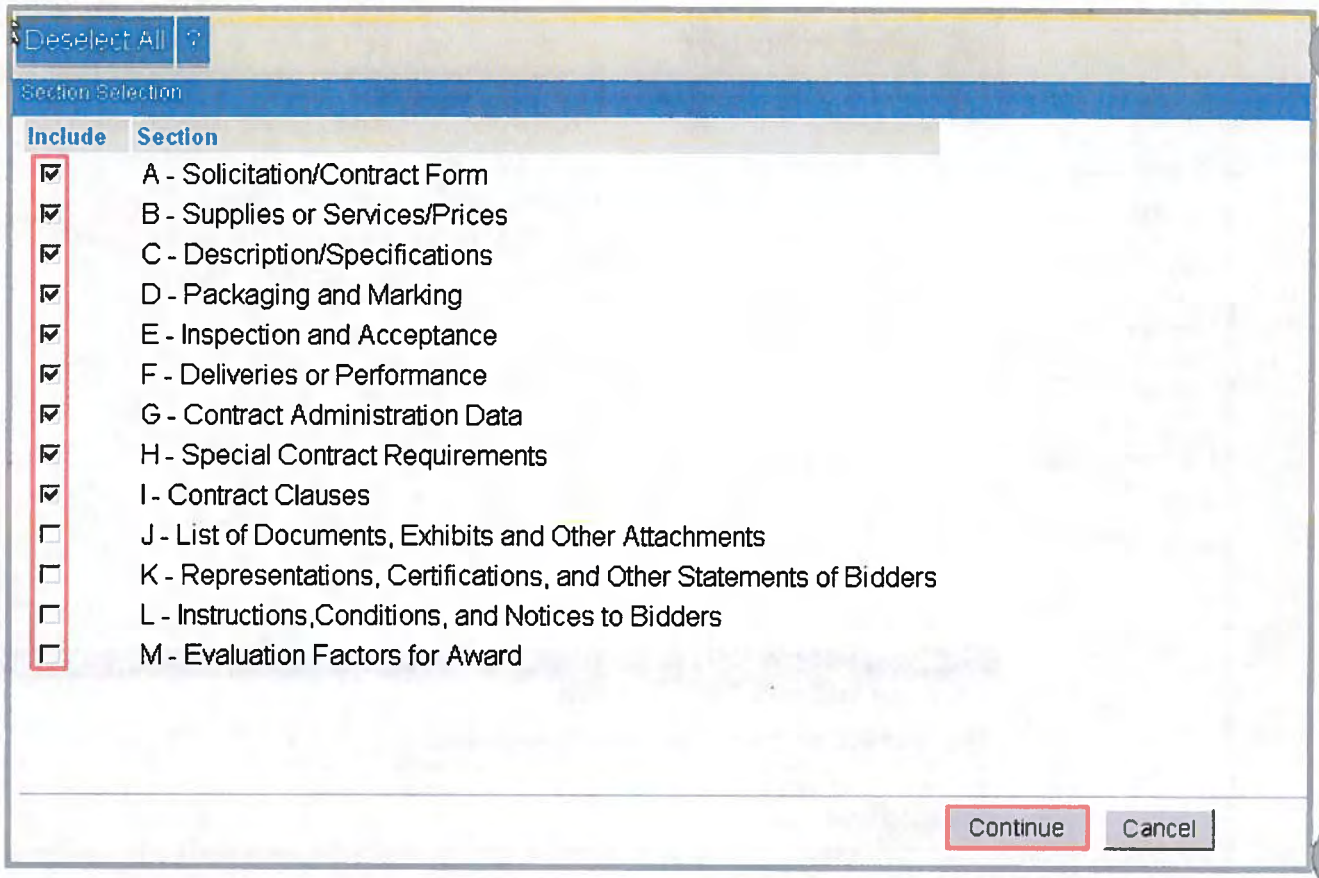


Figure 6: Section Selection Screen

Steps	Section	User Action	Guidance
8.	Section Selection	Check or uncheck the boxes to select clause sections you want to carry forward to the award.	By selecting the **Section**, you will copy all the clauses and **Fill In** values used in the Solicitation. The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS document.
9.	Section Selection	Click the **Continue** button.	

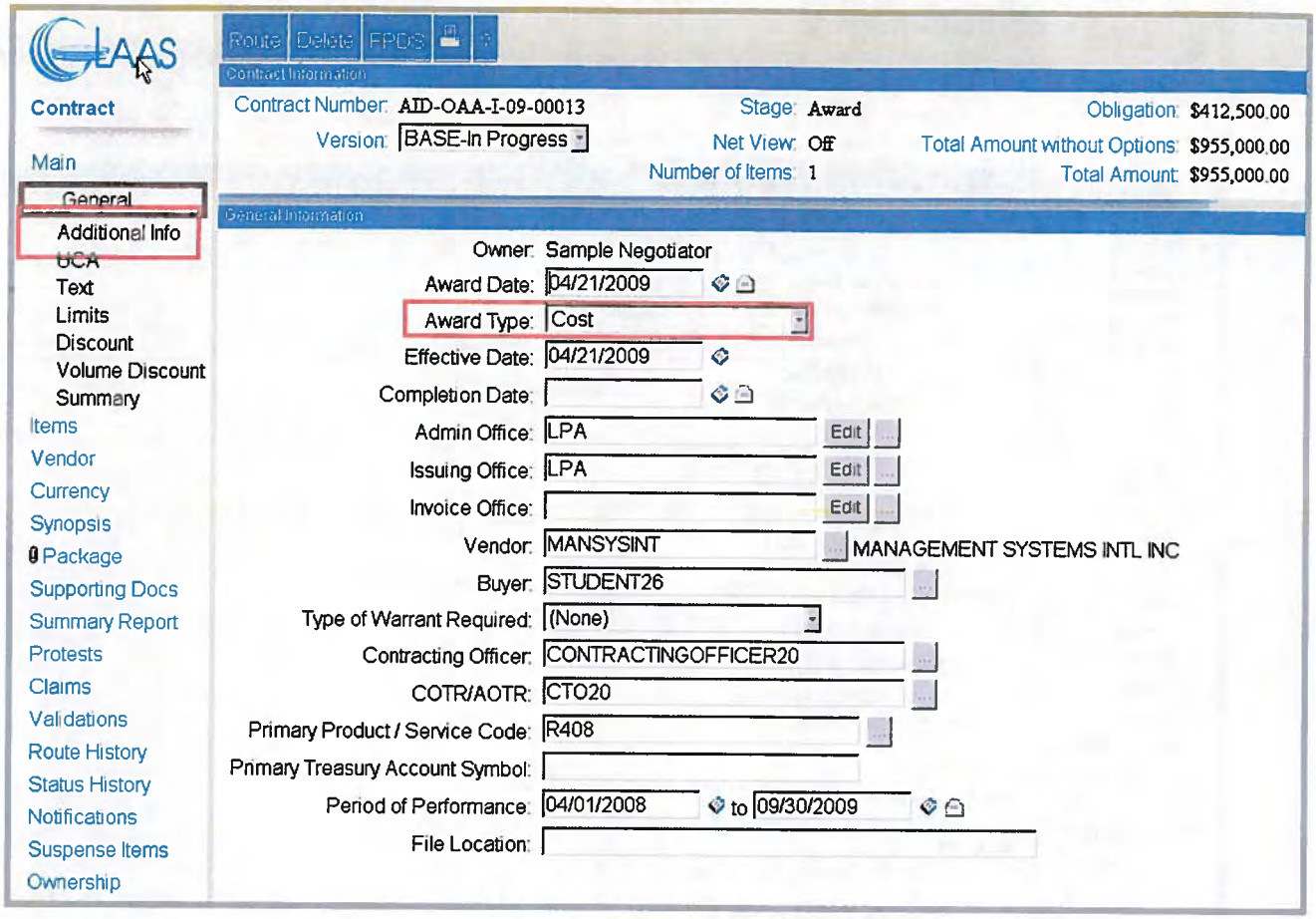


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
10.	Main / General	Select "Indefinite Quantity" as the **Award Type**. Complete the remaining fields on the **Main/ General** screen as you would for a regular Contract.	Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out the fields on this screen.
11.	Main / General	Click the **Additional Info** link on the left-menu.	

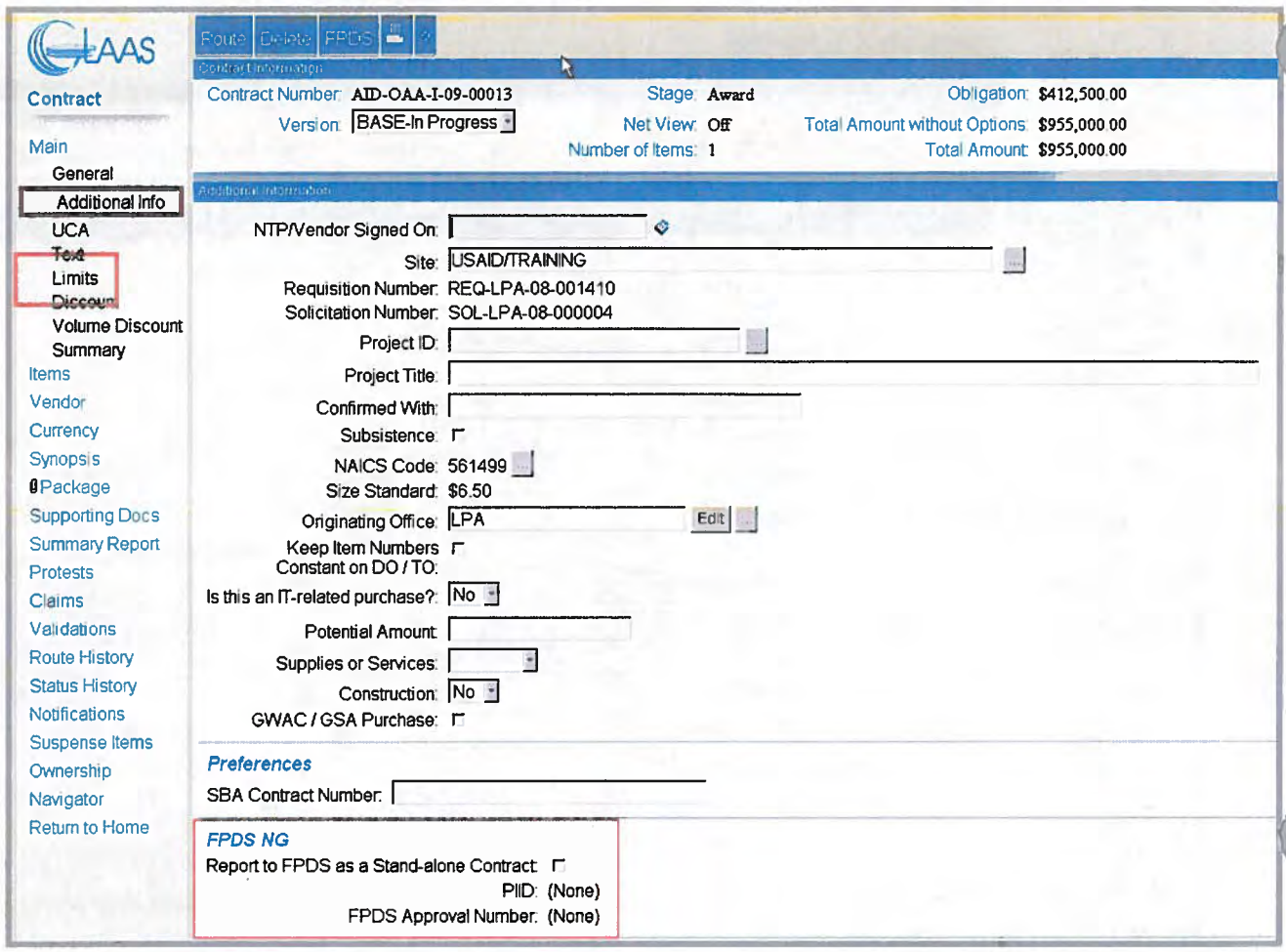


Figure 8: Main / Additional Info Screen

Steps	Section	User Action	Guidance
12.	Main / Additional Info	Complete the fields on the **Main / Additional Info** screen as you would for a regular Contract.	Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out the fields on this screen.
13.	Main / Additional Info	Make sure that you do not check the **Report to FPDS as a Stand-alone Contract** checkbox.	USAID is not currently using the **Keep Item Numbers Constant on DO/TO** field. **WARNING!** If you select the **Report to FPDS as a Stand-alone Contract** checkbox, you will not be able to create a Delivery / Task Order from this IQC.
14.	Main / Additional Info	Click the **Limits** link on the left-hand menu.	

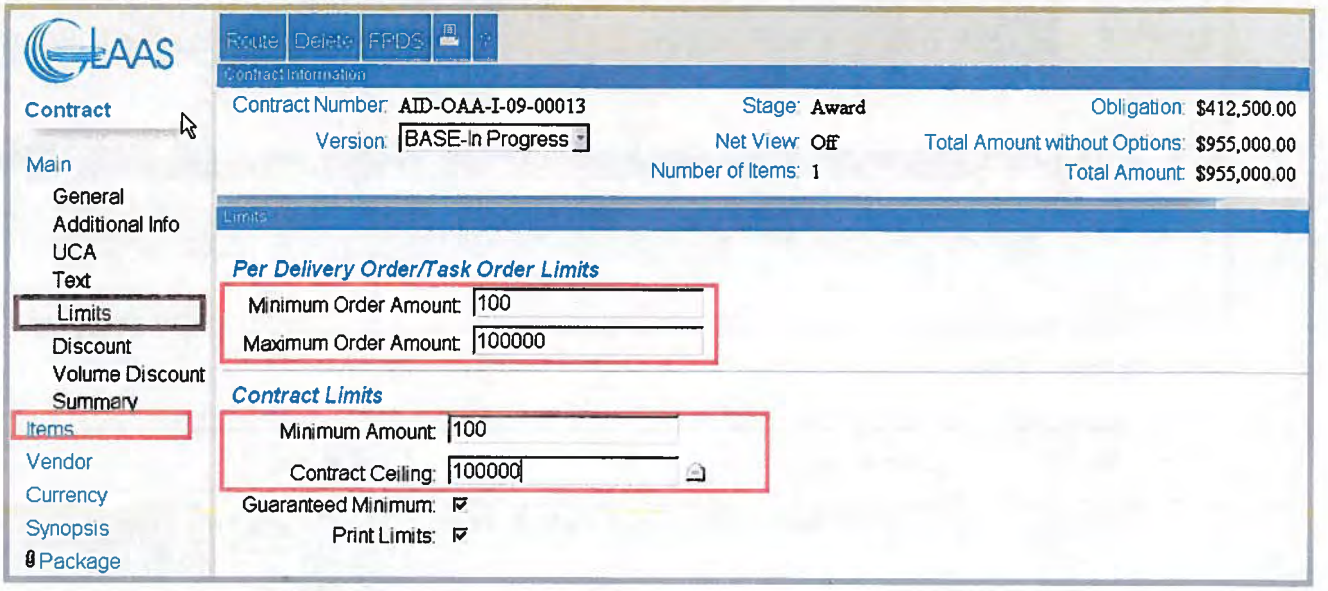


Figure 9: Main / Limits Screen

Steps	Section	User Action	Guidance
15.	Main / Limits	Complete the following Required (R) and/or Optional (O) fields: **Minimum Order Amount:** Type the minimum order amount allowed per delivery / task order. — R/O **Maximum Order Amount:** Type the maximum order amount allowed per delivery / task order. — R/O **Minimum Amount:** Type the overall minimum order amount allowed for the contract. — R/O **Contract Ceiling:** Type the contract ceiling price beyond which the contractor should not be paid. The amount entered here should match the Award TEC in **Step 18**. — R/O **Guaranteed Minimum:** Check the box if there is a minimum guarantee for an IQC contract. — O **Print Limits:** Check the box if you want the above limits to print on the contract. — O	You do not need to complete the **Limits** section if the IQC is under a Shared Ceiling. These fields are required when the IQC is not under a Shared Ceiling. Use the notifications button ( ) to create a Notification for the **Contract Ceiling** field.
16.	Main / Limits	Click the **Items** link on the left-hand menu.	

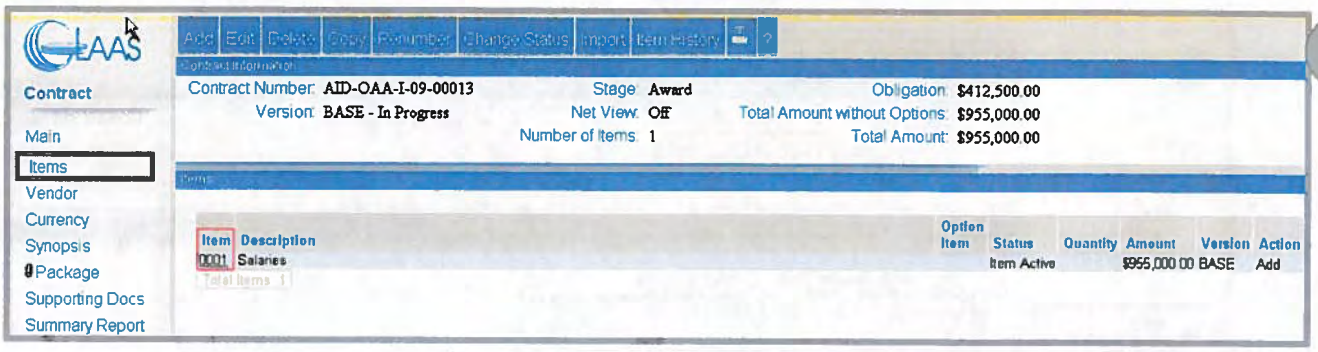


Figure 10: Items Screen

Steps	Section	User Action	Guidance
17.	Items	Click the **Item** number link to edit an item.	The Contract line items are pulled into the IQC from the referenced Solicitation.

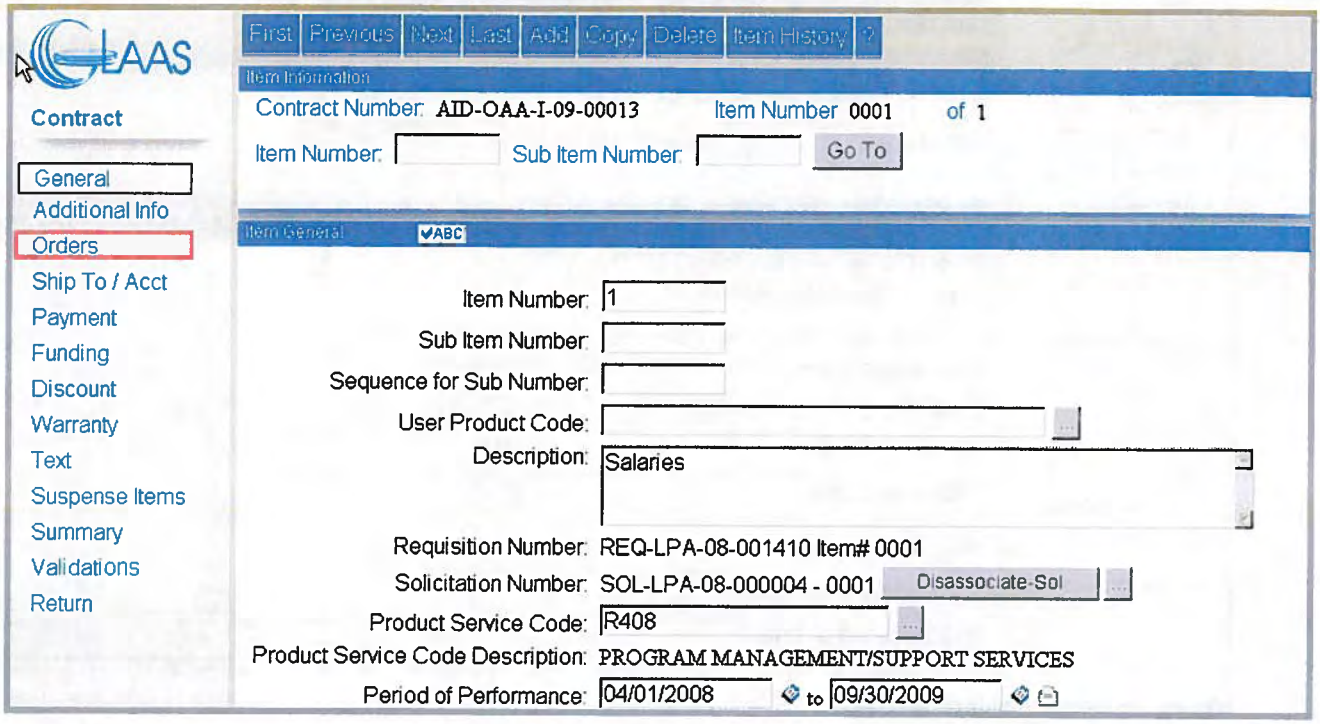


Figure 11: Items / General Screen

Steps	Section	User Action	Guidance
18.	Items / General	Select "Indefinite Quantity" as the **Award Type** (not shown). Check the **Minimum Guarantee** box (not shown). Complete the remaining fields on the **Items / General** and **Items / Additional Info** screens as you would for a regular Contract.	Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out the fields on these screens. If this is a Shared Ceiling IQC, set the Minimum Guaranteed Amount (MGA) for the line item. If this is a non-competitive IQC, then the line item should reflect the MGA as well as the total amount for the line item. On a non-competitive IQC, the IQC total amount assures the DO/TO does not exceed the IQC amount.
19.	Items / General	Click the **Orders** link on the left-hand menu.	

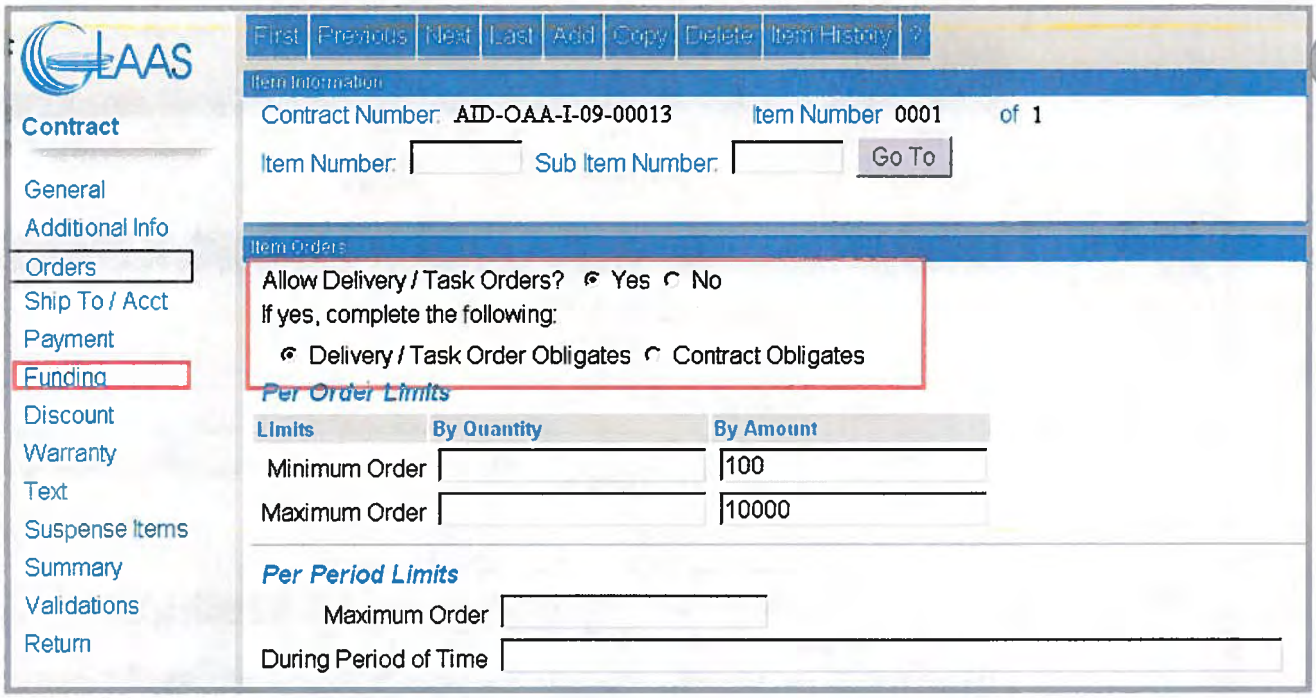


Figure 12: Items / Orders Screen

Steps	Section	User Action	Guidance
20.	Items / Orders	Complete the following Required (R) and/or Optional (O) fields: **Allow Delivery/ Task Orders?:** Select the **YES** radio buton to allow DO/TOs against this line item. — R **If yes, complete the following:** If you allow DO/TOs, select the **Delivery/Task Order Obligates** radio button. — R **Per Order Limits:** Enter **Minimum Order** and **Maximum Order** limits if you allow orders **By Quantity** or **By Amount**. — R/O	The **Orders** screen will not appear if you selected **Report to FPDS as a Stand-alone Contract**. **Per Order Limits** are required when the award instrument type is an Indefinite Quantity Contract and the award is not under a Shared Ceiling. If you selected "Indefinite Quantity" as the **Award Type** on the **Items / General** screen, GLAAS will pre-populate the **Items / Orders** screen to allow and obligate Delivery/Task Orders. USAID is not currently using the **Per Period Limits** field.
21.	Items / Orders	Click the **Funding** link on the left-hand menu.	Go to the **Funding** screen if this line item has a guaranteed minimum, and you want to obligate that amount on the Contract Line Item.

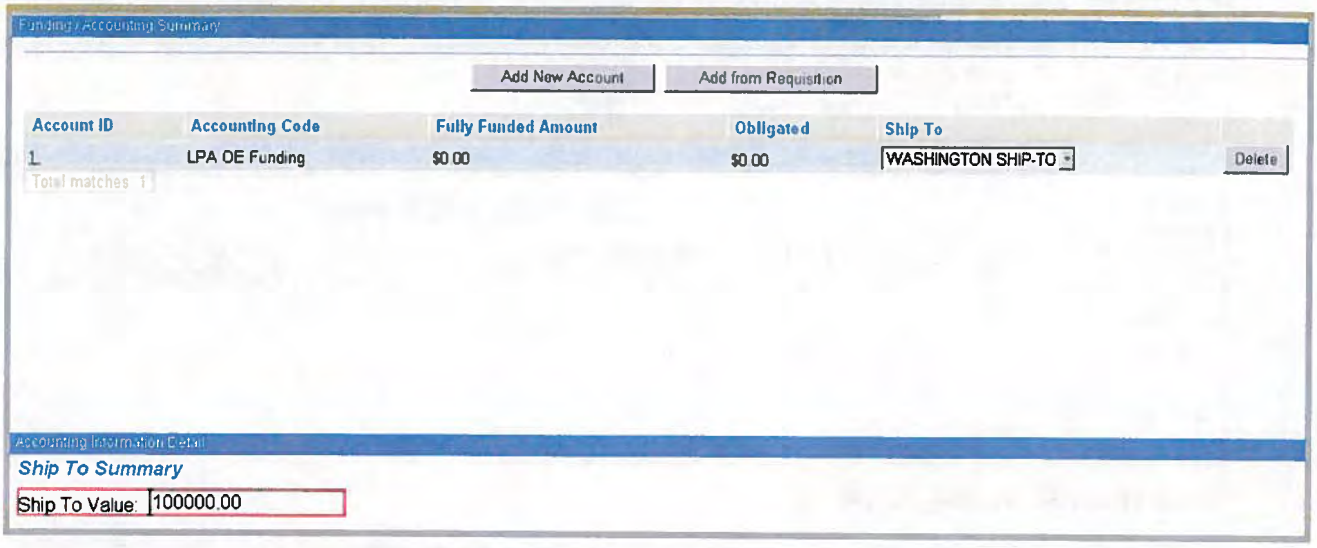


Figure 13: Items / Funding Screen

Steps	Section	User Action	Guidance
22.	Items / Funding	Update the **Ship To Value** to reflect the Maximum Amount for this line item.	The **Ship To Value** should match the total amount of this item to obligate the guaranteed minimum on the Contract Line Item.

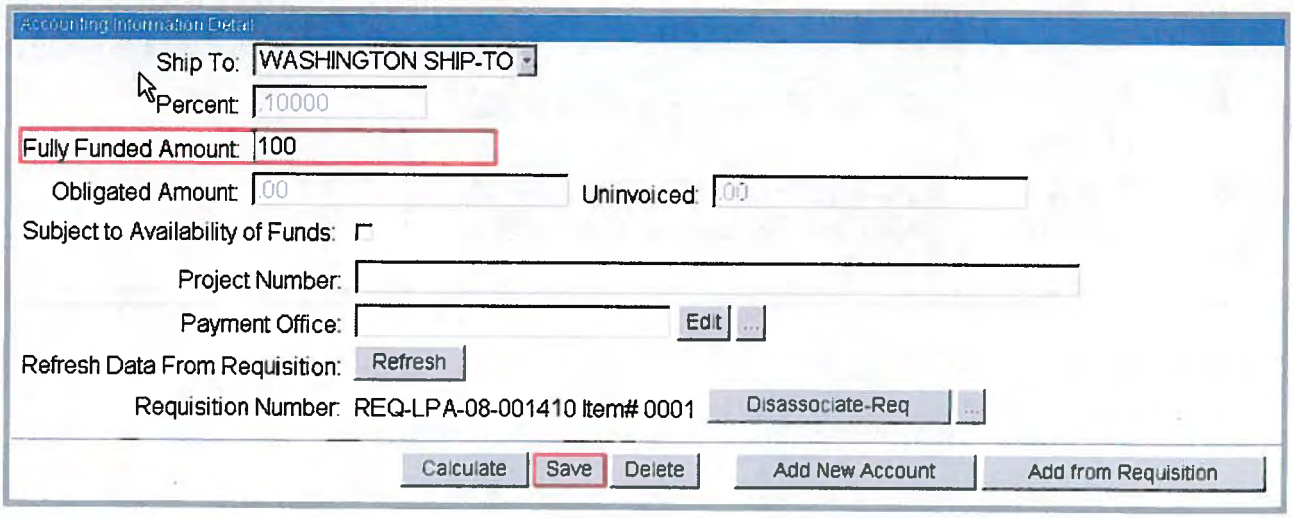


Figure 14: Items / Funding Screen

Steps	Section	User Action	Guidance
23.	Items / Funding	Enter the **Fully Funded Amount**.	The **Fully Funded Amount** should be the total obligated amount to date.
24.	Items / Funding	Click the **Save** button.	

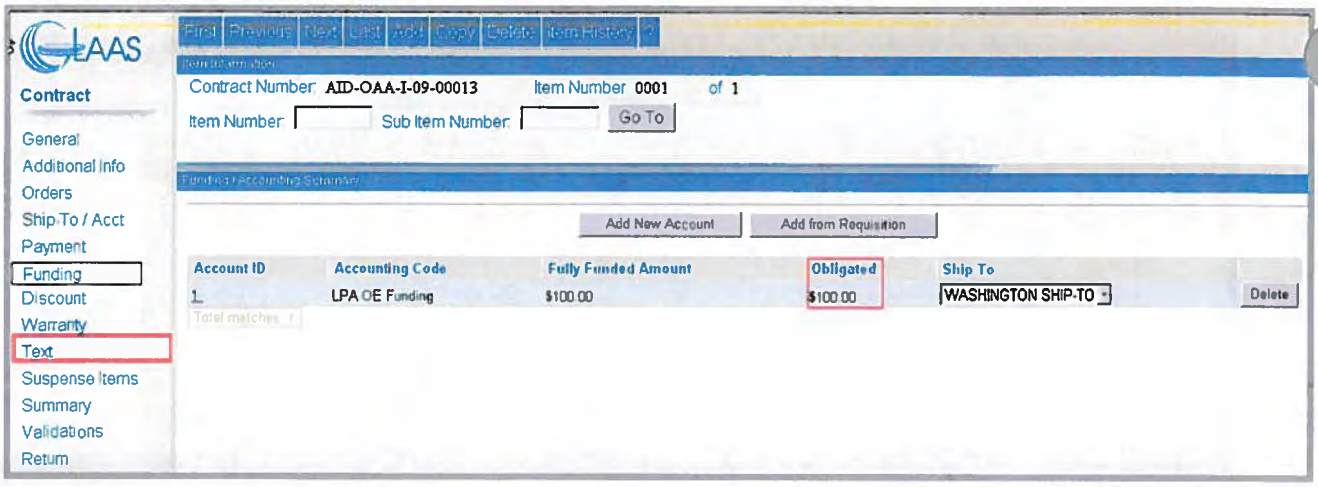


Figure 15: Items / Funding Screen

Steps	Section	User Action	Guidance
25.	Items / Funding	Review the **Obligated** amount, which should reflect the guaranteed minimum.	If you do obligate the Minimum Guaranteed amount on the line item, and also set the system to allow/obligate with DO/TOs, the system will give you the following warning: "Funds are obligated for an item where Delivery Order is set to Obligate." You can ignore this warning when Approving/Releasing your award.
26.	Items / Funding	Click the **Text** link on the left-hand menu.	
27.	Items / Funding	Refer to the *Creating a Contract from a Requisition* user guide to finish creating this IQC.	

GLAAS 102 USER GUIDE:

CREATING A DELIVERY/TASK ORDER

PURPOSE:

This user guide will show you how to create a Delivery/Task Order.

BEFORE STARTING:

1. In order to create a Delivery/Task Order, you must be an A&A Specialist or a Contracting Officer.
2. In order to approve or release a Delivery/Task Order, you must be a Contracting Officer.

NOTES:

When creating a Delivery/Task Order for a multiple-award IQC, you must create the document from a Requisition. Only Delivery/Task Orders for a single-award IQC can be created from a Requisition for DO/TO. This user guide will display screen shots of a Delivery/Task Order being created from a Requisition.

The process for creating a Delivery/Task Order is largely the same as the process used to create a Contract. This user guide will only highlight the differences between creating a Delivery/Task Order and creating a Contract. The *Creating a Contract from a Requisition* user guide contains a walkthrough on how to create a Contract.

STEPS:

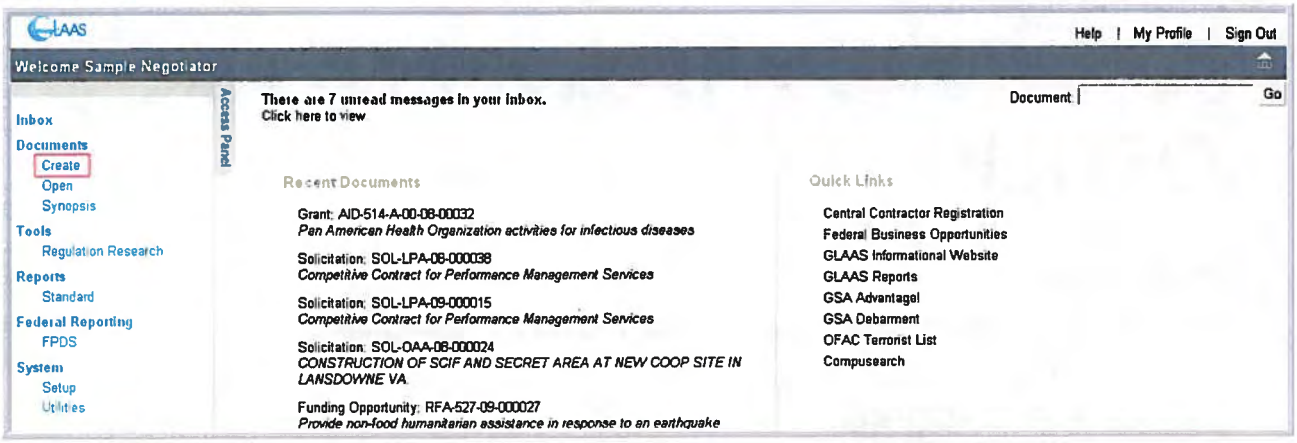


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

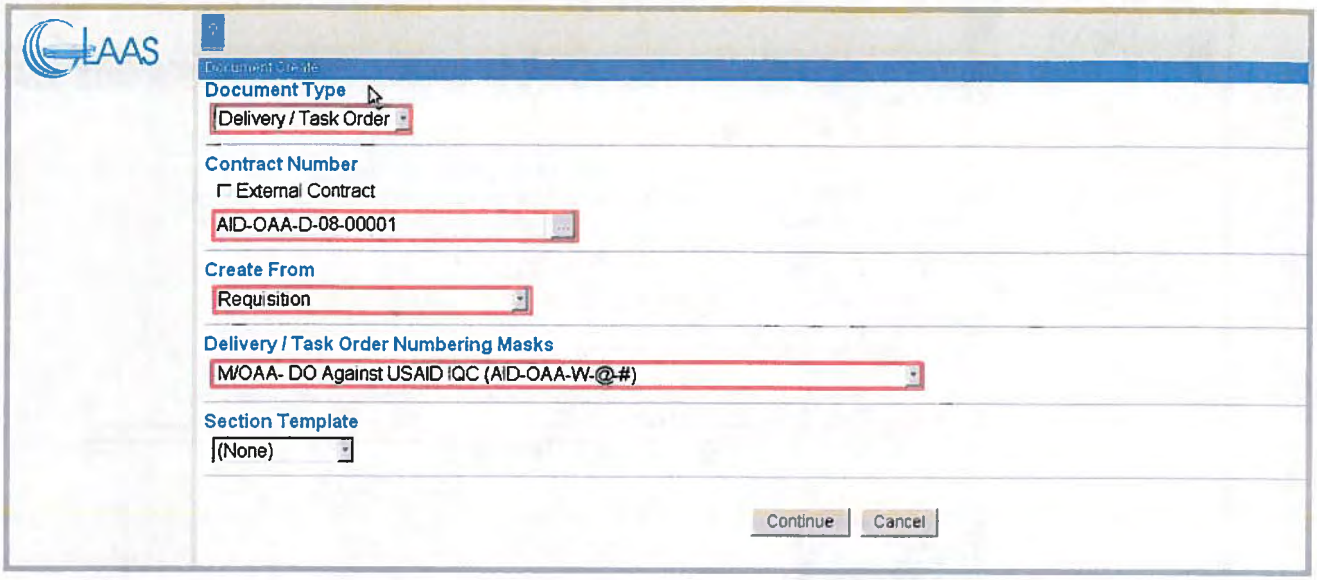


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** "Delivery/Task Order." • **Contract Number:** Select "External Contract" if this is against a GSA or other Federal Schedule contract. Then manually enter the Contract Number. OR Click the lookup button (...) to search for and select the base internal GLAAS IQC. • **Create From:** Select "Requisition." • **Delivery/Task Order Numbering Masks:** Select a numbering mask that fits the type of order you are creating.	If you are creating a Delivery/Task Order that uses bilateral funding, you must **Create From** a full requisition. GLAAS uses different instrument codes for different types of delivery/task orders: • "TO" = DO Against a USAID IQC (Internal GLAAS IQC) • "M" = GSA Schedule Order (External Contract) • "N" = Other Federal Order/Contract (External Contract)

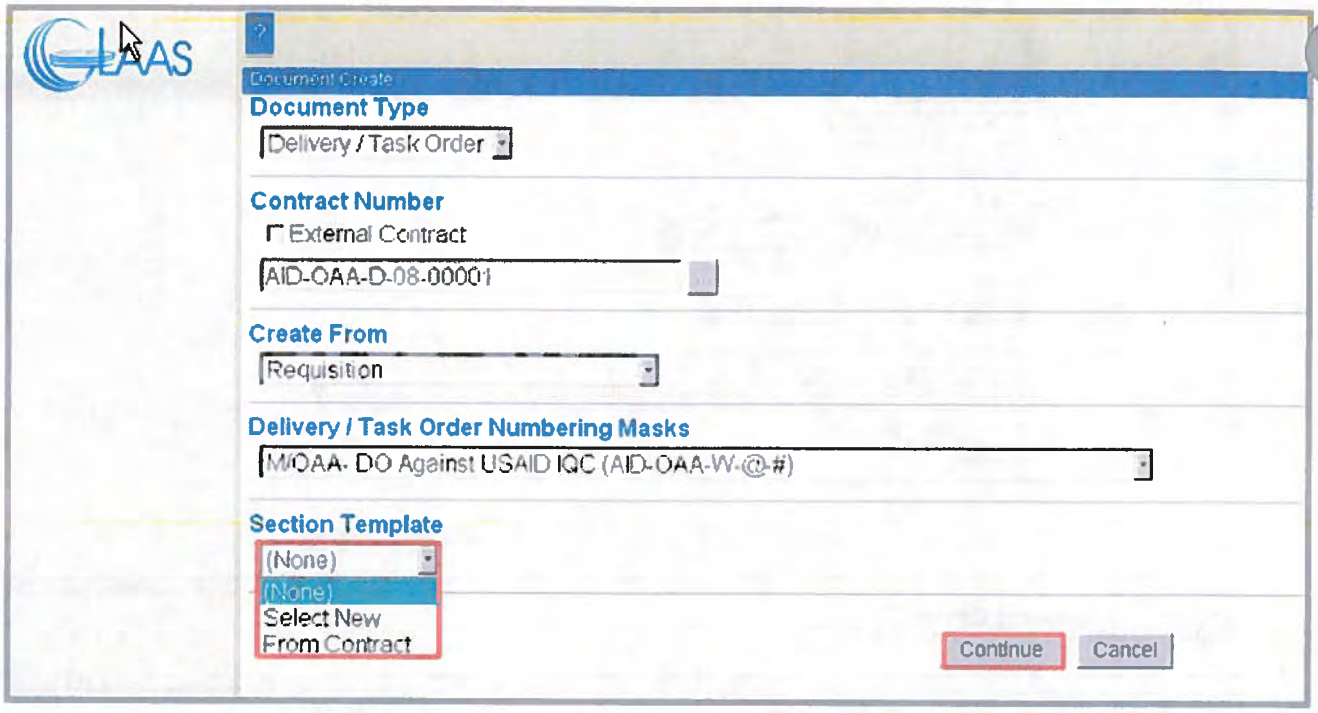


Figure 3: Document Create Screen

Steps	Section	User Action	Guidance
3. cont.	Document Create	Complete the following field: • **Section Template:** Select a section template based upon the need for this Delivery/Task Order.	There are three **Section Template** options to choose from: • "(None)" – No clause template is loaded. • "Select New" – Load a new clause template. • "From Contract" – Load the clause template from the Requisition.
4.	Document Create	Click the **Continue** button.	

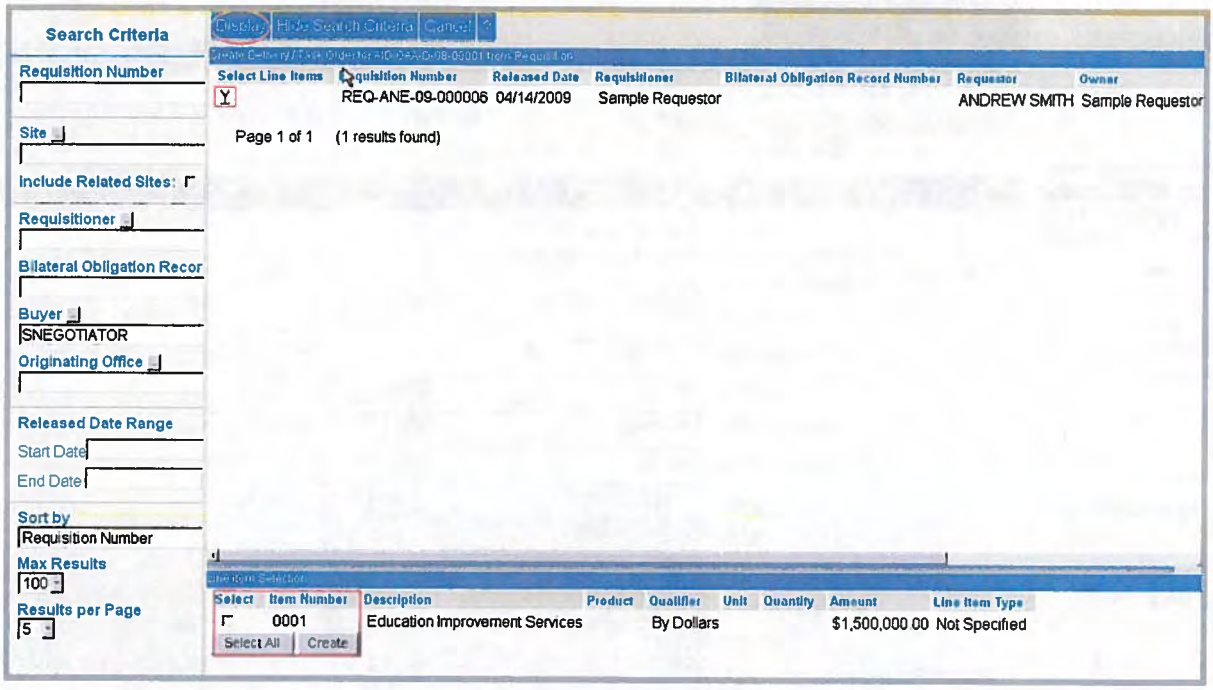


Figure 4: Create Delivery / Task Order from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create Delivery / Task Order from Requisition	Search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
6.	Create Delivery / Task Order from Requisition	Click the **Y** link in the **Select Line Items** column to view a requisition's line items at the bottom of the screen. **Select** one or more line items to pull forward from the requisition into the award.	If creating from a Requisition for DO/TO, you have the following options instead of **Select Line Items**: • **All Line Items:** Selects all the items from the requisition. • **Individual Line Items**: Allows you to select individual line items. • **No Line Items**: No line items are pulled into the award.
7.	Create Delivery / Task Order from Requisition	Click the **Create** button.	

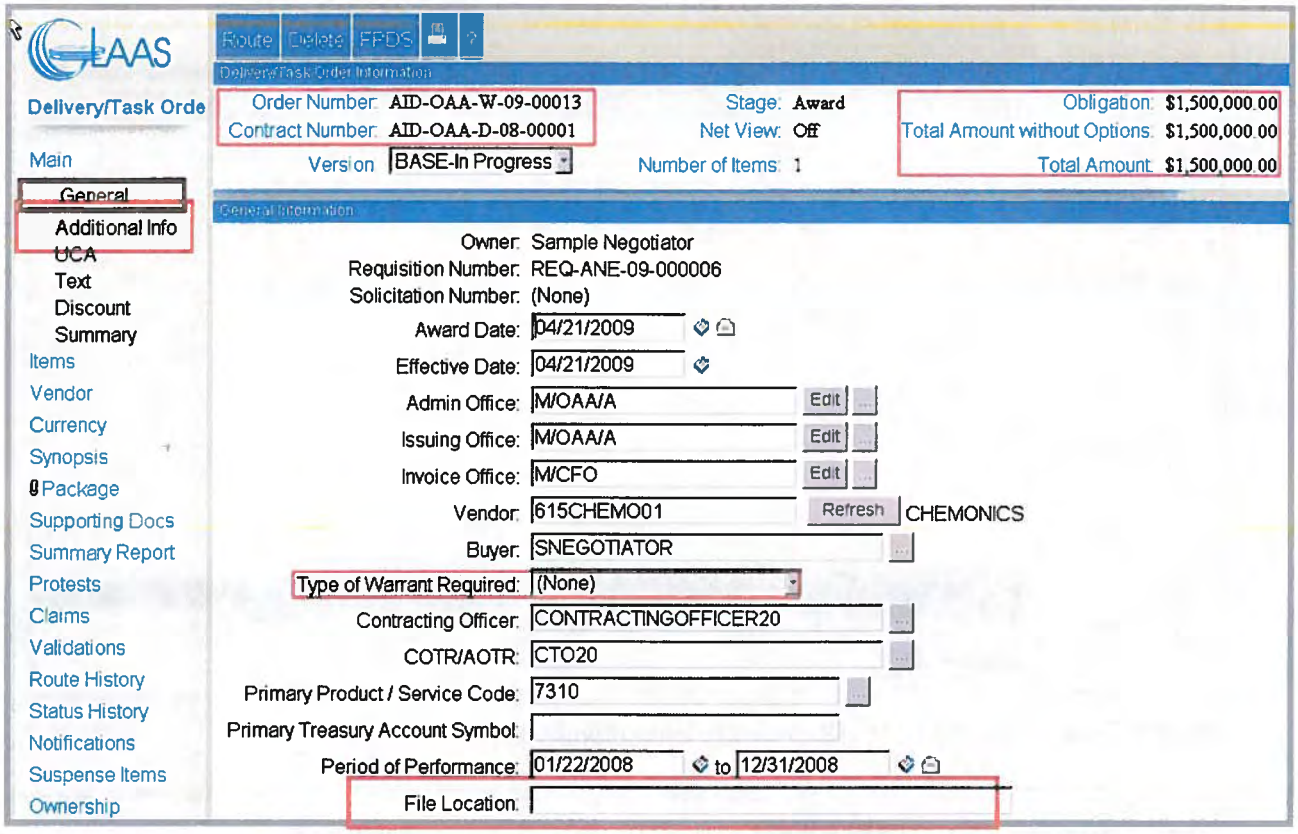


Figure 5: Main / General Screen

Steps	Section	User Action	Guidance
8.	Main / General	Note that GLAAS displays the **Obligation** and **Total Amount** from the Requisition. **Type of Warrant Required:** Select the warrant type that the Contracting Officer needs to approve and release this Delivery/Task Order. **Period of Performance (POP):** Update the POP to reflect the start and end date of the DO/TO.	GLAAS displays both the **Order Number** for this particular action and the **Contract Number** for the base IQC. The warrant level validates against the total estimated cost, versus the amount being obligated on this action. Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out the fields on the **Main / General** screen. The start date of the DO/TO POP must be within the POP of the IQC.
9.	Main / General	Click the **Additional Info** link on the left-hand menu.	

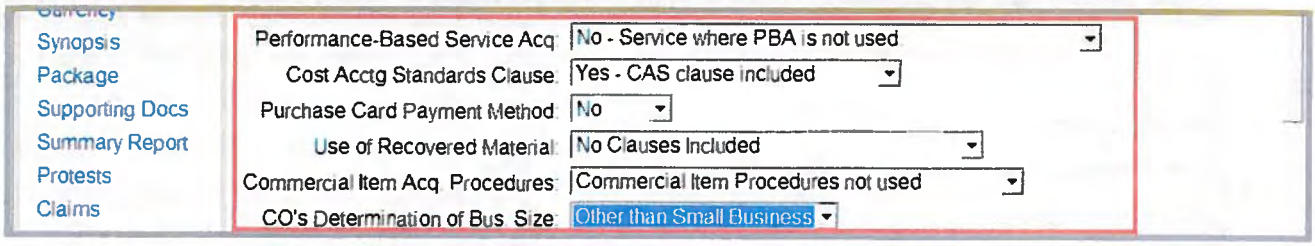


Figure 6: Main / Additional Info Screen

Steps	Section	User Action	Guidance
10.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Performance Based Services Acq:** Select the appropriate value from the dropdown menu. — R **Cost Acctg Standards Clause:** Select the appropriate value from the dropdown menu. — R **Purchase Card Payment Method:** Select "Yes" if a purchase card was used. — R **Use of Recovered Material:** Select the appropriate value from the dropdown menu. — R **Commercial Item Acq. Procedures:** Select the appropriate value from the dropdown menu. — R **CO's Determination of Bus. Size:** Select the appropriate value from the dropdown menu. — R	

Additional Information

GDA Flag:	NO
Payment method:	
Environmental Determination Document Name:	N/A
Place of Performance:	000
Authorized Geographical Code:	000
22 CFR 216 Compliance Status:	EXEMPT - OE EXPENSE

Figure 7: Main / Additional Info Screen

Steps	Section	User Action	Guidance
10 cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **GDA Flag:** Select "YES" if this action is for the Global Development Alliance. — R **Payment Method:** Select from the list how the award will be paid. — R **Environmental Determination Document Name:** Enter a document title (if applicable), otherwise enter "N/A." — R **Place of Performance Code:** Select the three-digit code indicating the country where the work will be performed. — R **Authorized Geographical Code:** Select a three-digit code indicating the country that is authorizing the work to be done. — R **22 CFR 216 Compliance Status:** Select an environmental compliance status code from the dropdown list. — R	The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.

Benefiting Country Code:	663
Subcontract/Subgrant Plan Required:	NO
Performanced Based Contract/Results Oriented Grant:	NO
Name of Subcontractor/Subgrantee:	
Vessel Flag Priority:	
Leveraging:	
Grants Under Contract/Contracts Under Grant:	NO

Figure 8: Main / Additional Info Screen

Steps	Section	User Action	Guidance
10. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields:	

Benefiting Country Code: Select the code of the one country, or region (if applicable), that will benefit most from this action.	R
Subcontract/Subgrant Plan Required: Select "YES" or "NO."	R
Performance-Based Contract/Results Oriented Grant: Select "YES" or "NO."	R
Name of Subcontractor/Subgrantee: Enter the name of the subcontractor if applicable.	O
Vessel Flag Priority: Enter the flag priority if applicable.	O
Leveraging: Enter if this award was leveraged.	O
Grants Under Contract/Contracts Under Grant: Select "Yes" if it is a grant.	O

COTR/AOTR Assigned Date:	04/21/2009
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned CTO and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?:	YES
Acctg Period:	
Reporting Acctg Period:	
Action Type:	DK1
Award TEC:	1090000
NMS Award Fee Amount:	
NMS Award Other Amount:	
AIDAR/Agency Exemptions to Competition:	
Requisition Number (for mods only):	

Figure 9: Main / Additional Info Screen

Steps	Section	User Action	Guidance
10. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **COTR/AOTR Assigned Date:** Enter the date the COTR/AOTR was assigned to this action. — R **Has the COTR/AOTR designation letter been signed by all parties and delivered to the assigned CTO and all other parties?** Select "Yes" or "No." — R **Has a hard copy been placed in the OAA contract award file?** Select "Yes" or "No." — R **Acctg Period** — O **Reporting Acctg Period** — O **Action Type:** Select a code identifying the type of procurement action. — R **Award TEC:** Enter the Total Estimated Cost of the Award. — R **AIDAR/Agency Exemptions to Competition** — R	If the **Acctg Period** is blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format. If the **Reporting Acctg Period** is blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.
11.	Main / Additional Info	Click the **Limits** link on the left-hand menu (not shown).	

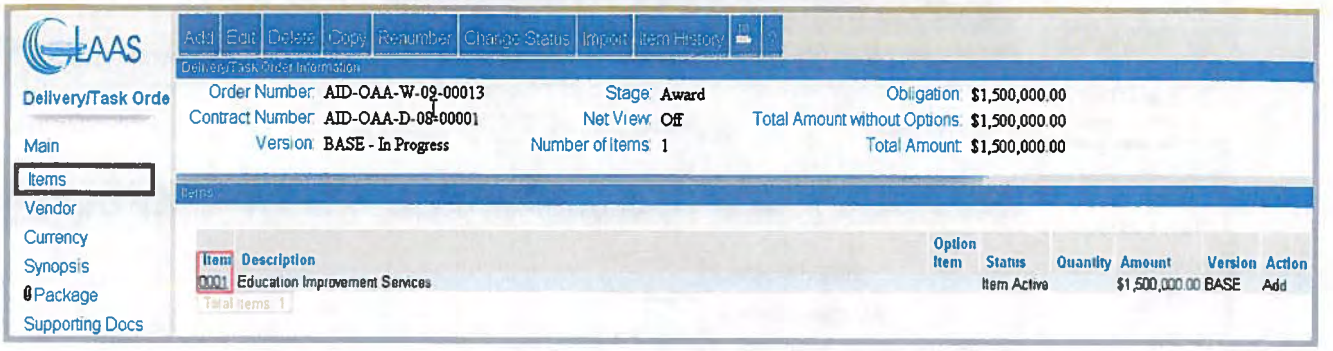


Figure 10: Items Screen

Steps	Section	User Action	Guidance
12.	Items	To edit an item, click a link in the **Item** column.	The Contract Line Items are pulled into the DO/TO from the referenced Requisition.

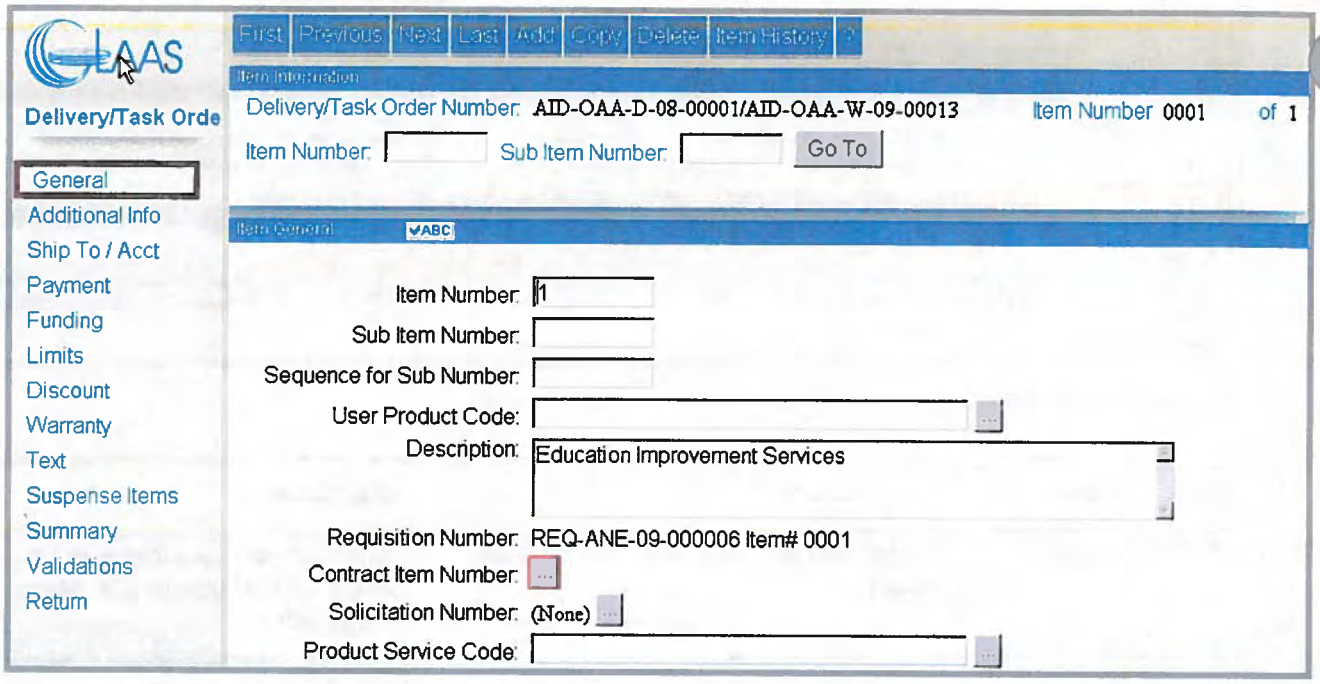


Figure 11: Item / General Screen

Steps	Section	User Action	Guidance
13.	Item / General	Fill out the **Item / General** screen just like a regular contract. Click the lookup button (...) next to **Contract Item Number** to link the DO/TO line item to the Contract line item.	If you fail to link the DO/TO line item to the **Contract Line Item**, the system will give you an error message. If the DO/TO was created from a Requisition for DO/TO, the system will have already linked the line item to the **Contract Line Item**. Skip to **Step 17**. Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out the fields on this screen.

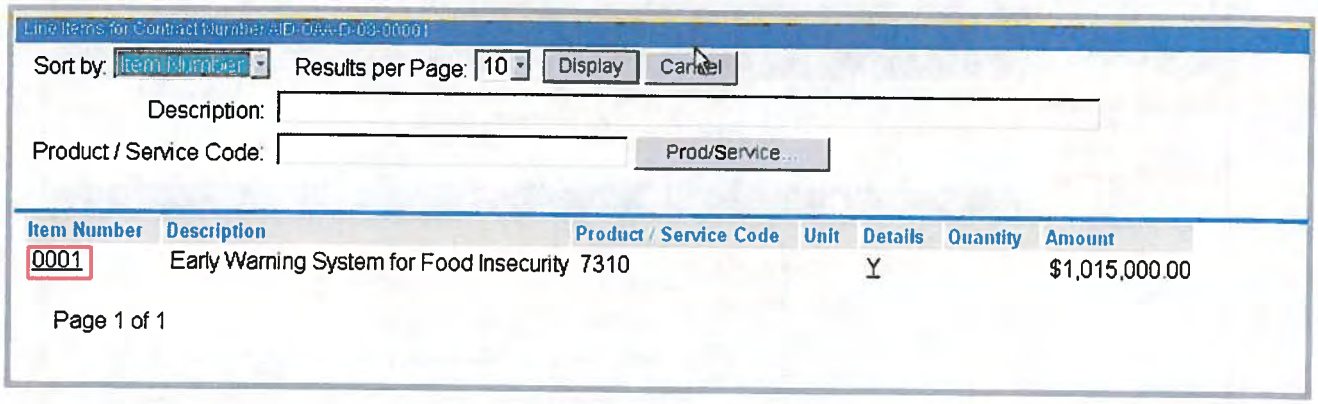


Figure 12: Line Item for Contract Number Screen

Steps	Section	User Action	Guidance
14.	Line Items for Contract Number	Click the **Item Number** link to associate the DO/TO line item to the Contract line item.	The system will only display line items from the IQC that allow DO/TOs to be made against them.

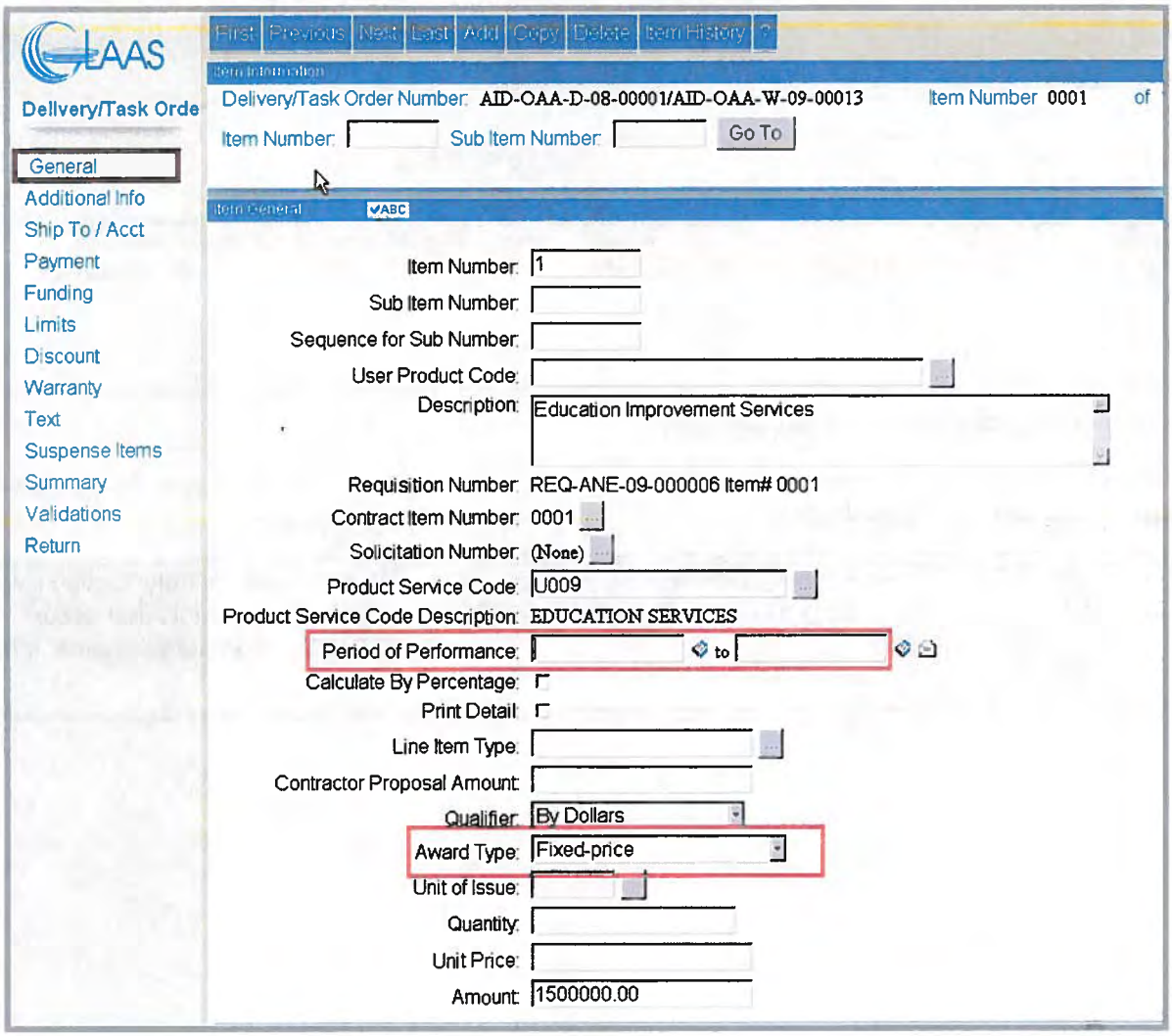


Figure 13: Item / General Screen

Steps	Section	User Action	Guidance
15.	Item / General	Enter the Line Item **Period of Performance**. Edit the **Award Type**, if necessary.	The item **Period of Performance** should fall within the DO/TO's overall **Period of Performance**. Unexercised option line items can begin and end after the overall DO/TO **Period of Performance** The **Award Type** defaults to "Fixed-Price" for all Delivery/Task Orders but the value can be changed.
16.	Item / General	Click the **Return** link on the left-hand menu (not shown).	Refer to the *Creating a Contract from a Requisition* user guide for detail on filling out the fields for each line item.

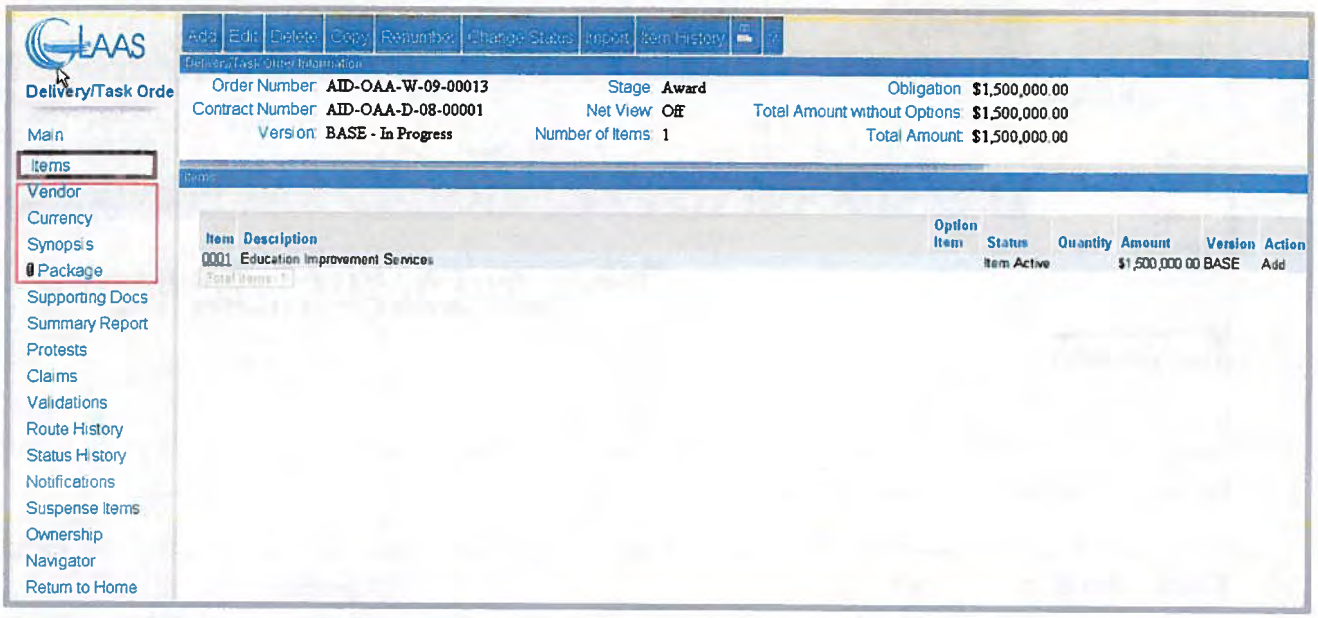


Figure 14: Items Screen

Steps	Section	User Action	Guidance
17.	Vendor	Click the **Vendor** link to check the vendor address just like a regular Contract (not shown).	Refer to the *Creating a Contract from a Requisition* user guide for more detail on how to fill out these four sections.
18.	Currency	Click the **Currency** link to check the print currency codes and validate the rate of exchange, just like a regular Contract (not shown).	
19.	Synopsis	Click the **Synopsis** link to synopsize this Delivery/Task Order for FedBizOpps just like a regular Contract (not shown).	
20.	Package	Click the **Package** link on the left-hand menu.	

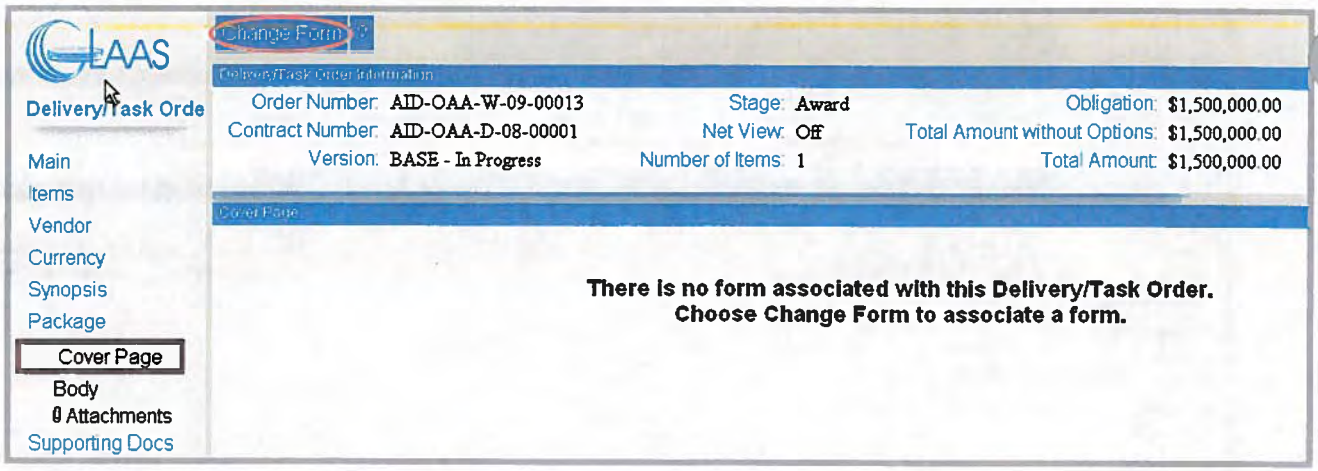


Figure 15: Package / Cover Page Screen

Steps	Section	User Action	Guidance
21.	Package / Cover Page	Click the **Change Form** toolbar button.	

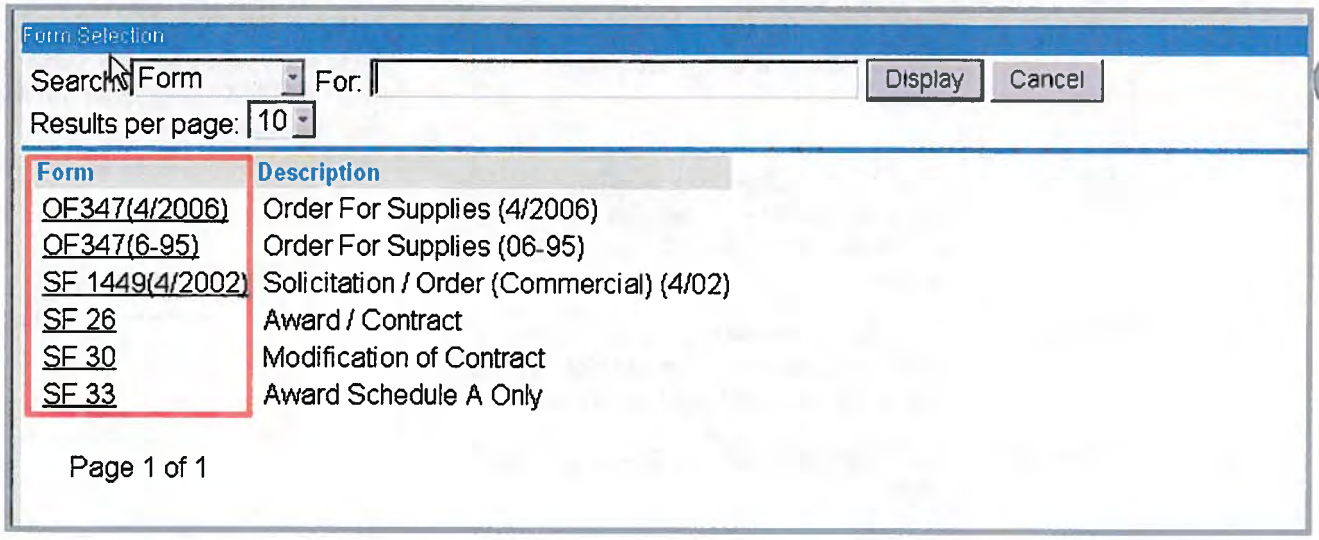


Figure 16: Form Selection Screen

Steps	Section	User Action	Guidance
22.	Form Selection	Click the **Form** link to select a Cover Page.	

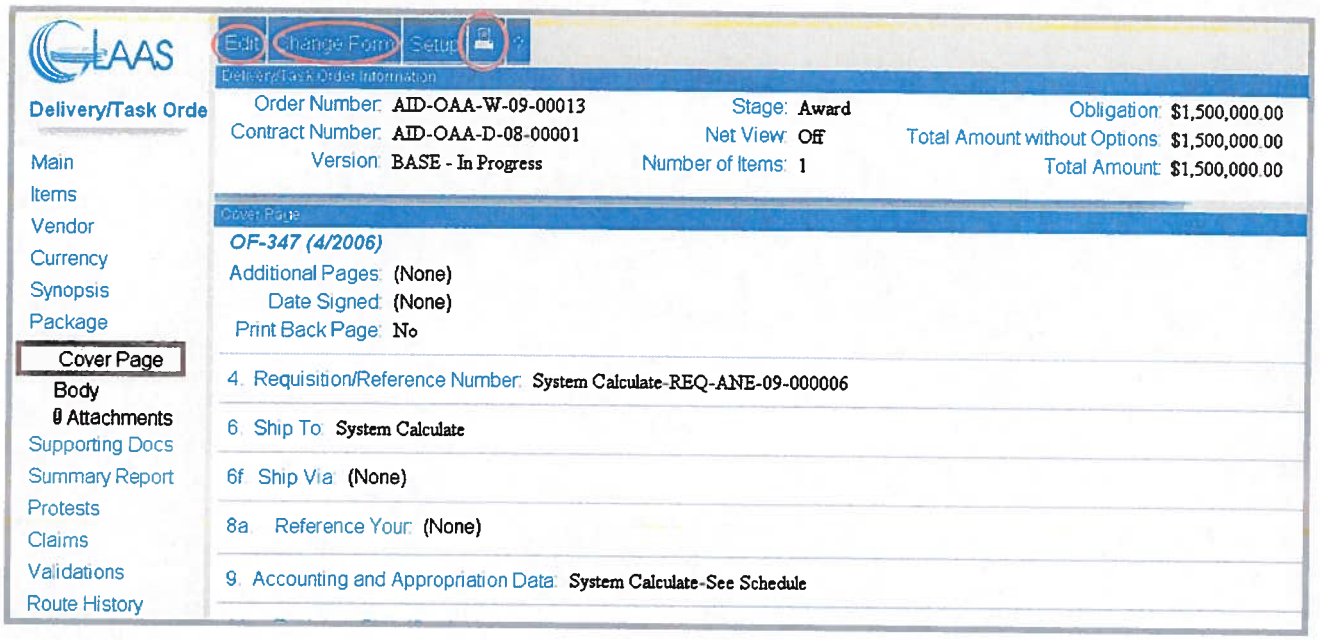


Figure 17: Package / Cover Page Screen

Steps	Section	User Action	Guidance
23.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the sections/blocks of the Cover Page. Click the printer toolbar button ( ) to open a new browser window and view the DO/TO Cover Page as a PDF (not shown).	GLAAS displays the sections/blocks from the **Cover Page** that may be edited. You may select a different cover page by clicking the **Change Form** toolbar button. Refer to the *Filling Out a Form* user guide for more information on how to work with Cover Pages in GLAAS.
24.	Package / Cover Page	From this point on, continue creating your Delivery/Task Order just like a Contract.	Refer to the *Creating a Contract from a Requisition* user guide to complete the DO/TO.

GLAAS 102 USER GUIDE:

CREATING AN INTER-AGENCY AGREEMENT (IAA)

PURPOSE:

This user guide will show you how to create an Inter-Agency Agreement (IAA).

BEFORE STARTING:

1. In order to create an IAA, you must be either an A&A Specialist or a Contracting Officer.
2. In order to approve or release an IAA, you must be a Contracting Officer or Assistant Administrator.
3. You must have an approved and released Requisition in GLAAS in order to create an IAA.

NOTES:

The process for creating an Inter-Agency Agreement is largely the same as the process used to create a Purchase Order. This user guide will only highlight the differences between creating an Inter-Agency Agreement and creating a regular Purchase Order. The Creating a Purchase Order user guide contains a full walkthrough on how to create a Purchase Order.

STEPS:

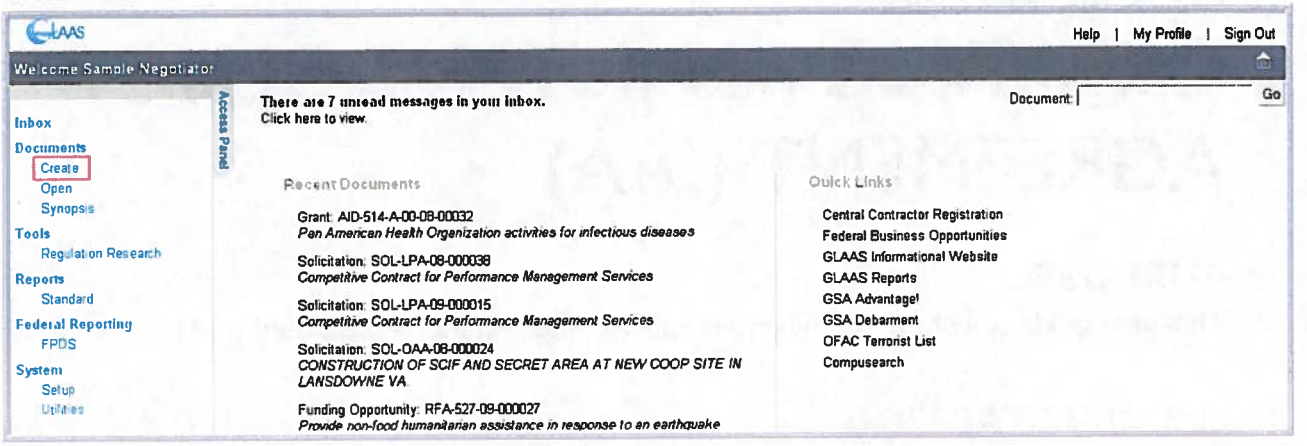


Figure 1: GLAAS Welcome Screen

Steps	Screen	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

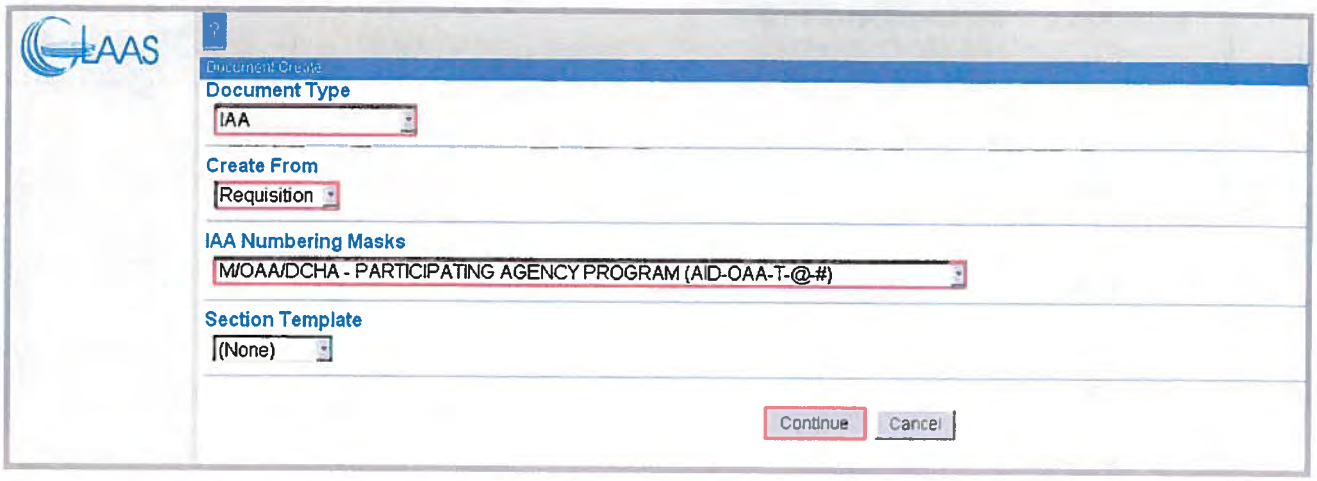


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	**Document Type:** Select "IAA." **Create From:** Select "Requisition." **IAA Numbering Masks:** Select a numbering mask to fit the type of IAA you are creating.	IAAs are created from Requisitions. GLAAS uses different instrument codes for different types of IAAs: – "P" = Participating Agency Service Agreement (PASA) – "R" = Resource Support Services Agreement (RSSA) – "T" = Participating Agency Program Agreement (PAPA) – "X" = Ribbon PASA **Section Template** is not used for Inter-Agency Agreements.
4.	Document Create	Click the **Continue** button.	

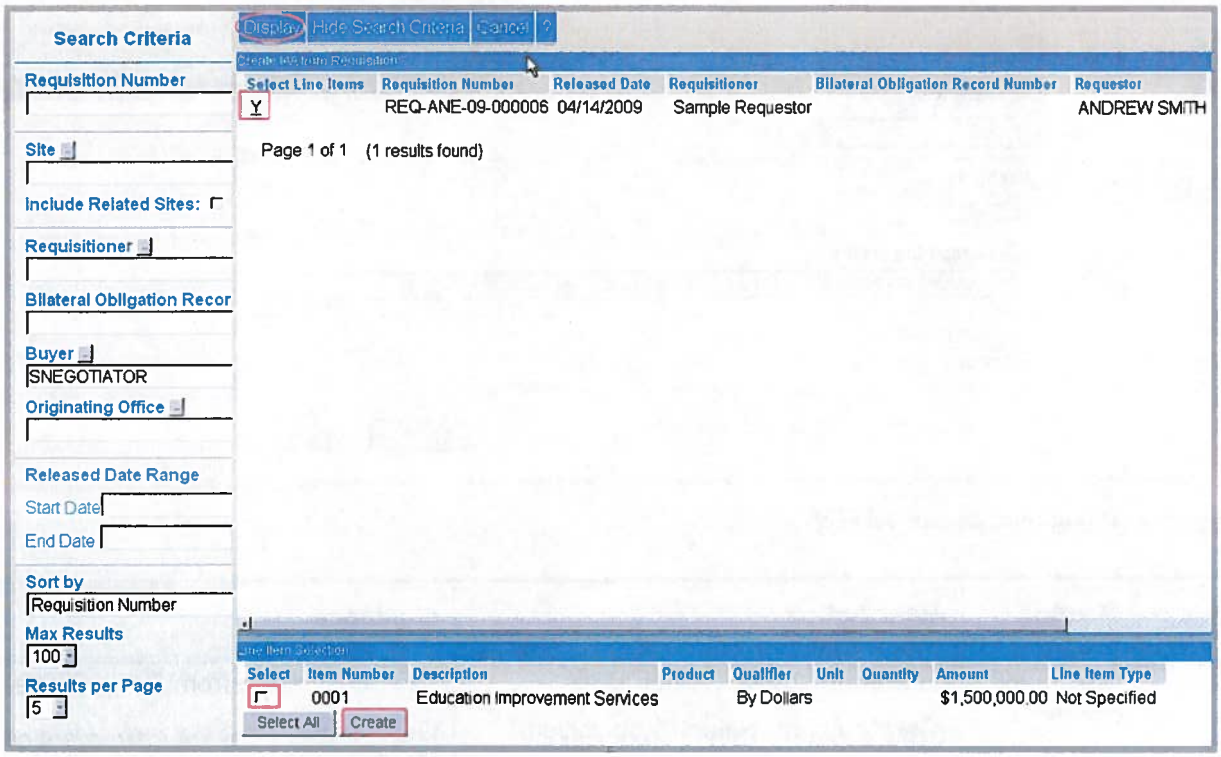


Figure 3: Create IAA from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create IAA from Requisition	**Search Criteria:** GLAAS allows you to search by **Requisition Number**, **Requisitioner** (Requestor) or **Buyer**. Click the **Display** button to view the available requisitions.	GLAAS displays a list of all "Released" requisitions that your security rights allow you to process into a Contract. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
6.	Create IAA from Requisition	Click the **Y** link in the **Select Line Items** column to view a requisition's line items at the bottom of the screen. **Select** one or more line items to pull them forward from the requisition into the award.	
7.	Create IAA from Requisition	Click the **Create** button.	
8.	Main / General	Click the **Agency** link on the left-hand menu to select the partner agency for this IAA (not shown).	Unlike other Awards, you select an **Agency** instead of a Vendor.

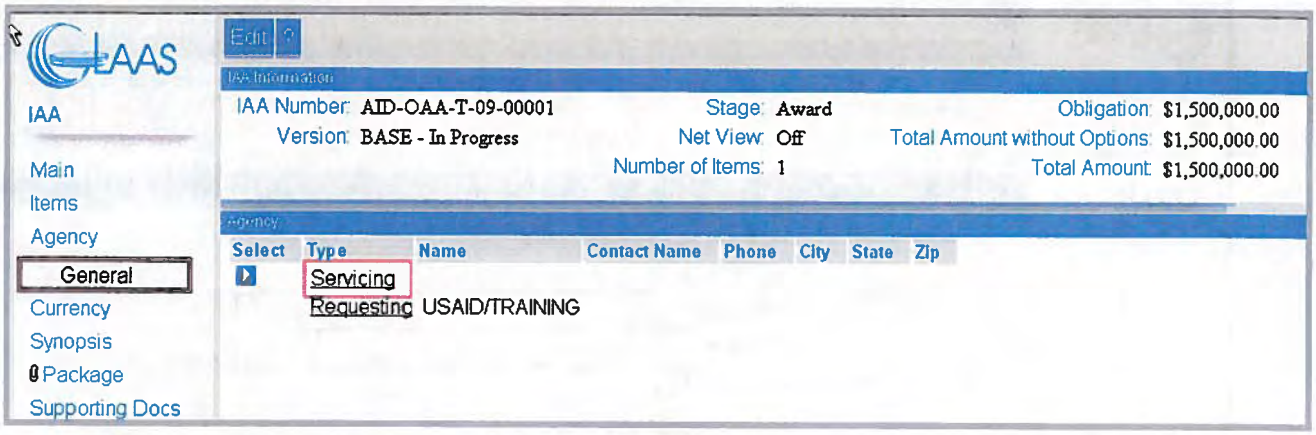


Figure 4: Agency / General Screen

Steps	Section	User Action	Guidance
9.	Agency / General	Click the **Servicing** link to select the agency that will provide the goods or services in this IAA.	The **Agency / General** screen shows the Servicing and Requesting agencies for this IAA. The **Requesting** Agency will default to your USAID site or mission, but can be changed if necessary.

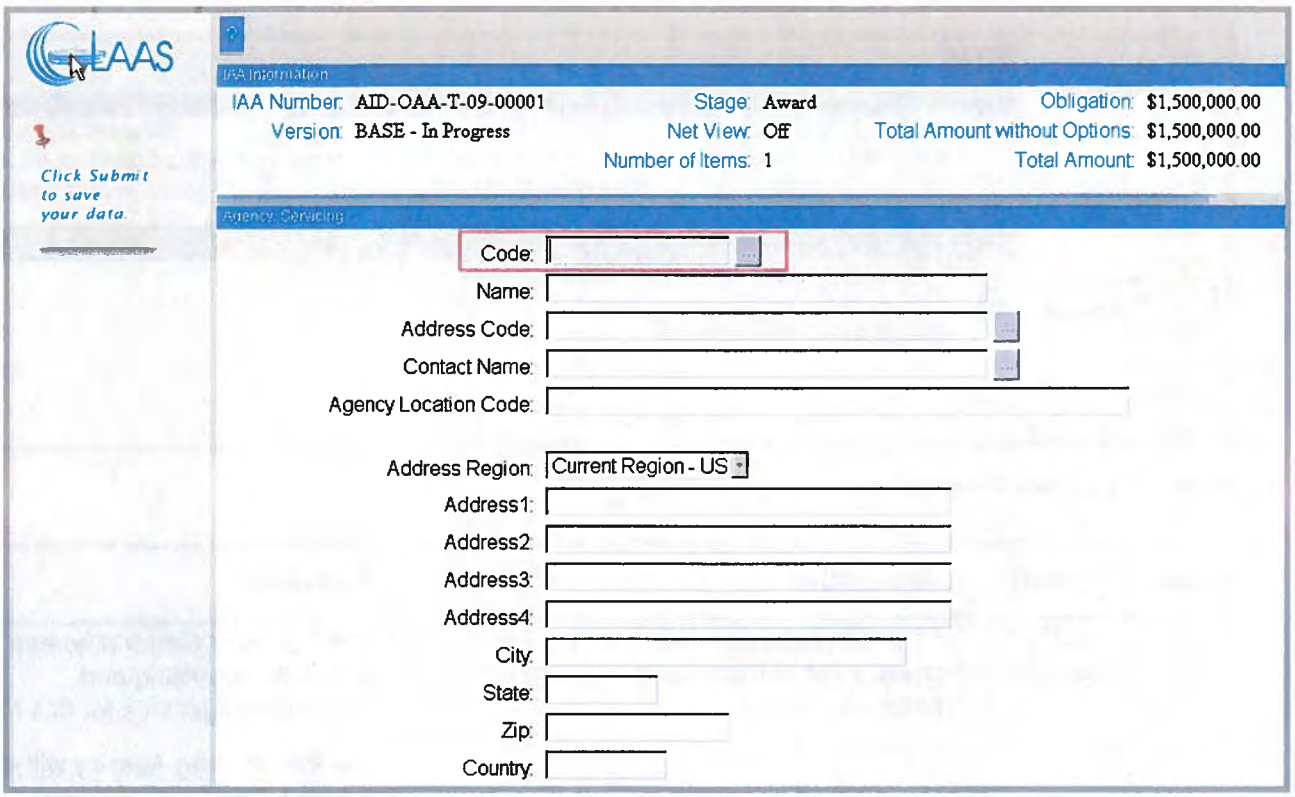


Figure 5: Agency Servicing Screen

Steps	Section	User Action	Guidance
10.	Agency: Servicing	Click the lookup button (...) next to **Code** to search for the servicing agency.	Use the **Agency: Servicing** screen to select the agency partner for this IAA. While GLAAS allows you to type in an agency name and address, you must select an agency in the **Code** field. The agencies in the **Code** field are pulled from Phoenix. If you do not select a **Code**, you will not be able to obligate funds for this IAA in Phoenix.

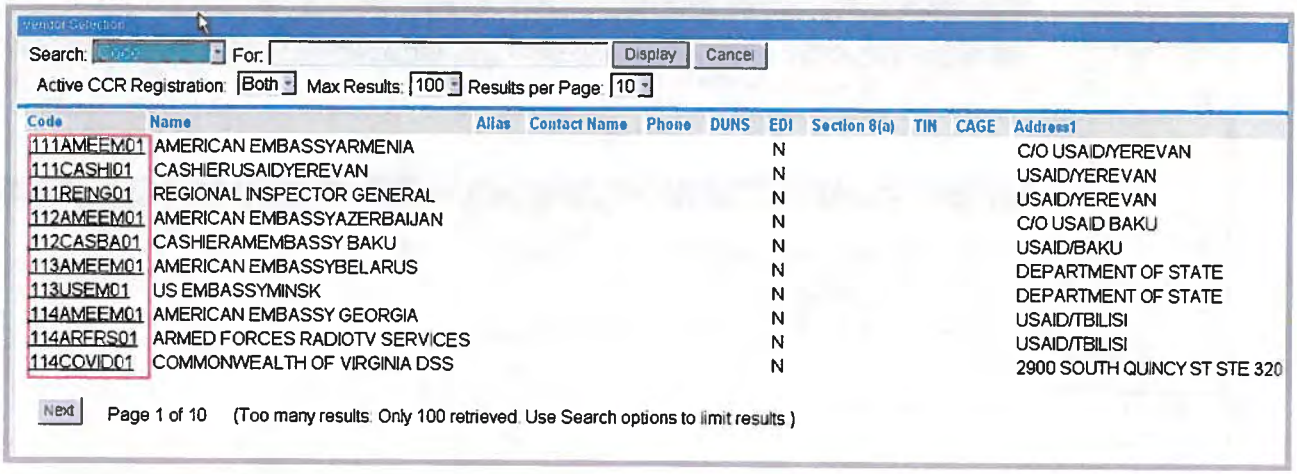


Figure 6: Vendor Selection Screen

Steps	Section	User Action	Guidance
11.	Vendor Selection	Search for the Servicing Agency and select the **Code** link.	Although this is an Inter-Agency Agreement, the agency lookup menu still says **Vendor Selection**.
12.	Agency Servicing	Click the **Submit** button to select that agency (not shown).	Refer to the *Creating a Purchase Order* user guide for more detail on how to fill out the fields on an IAA.

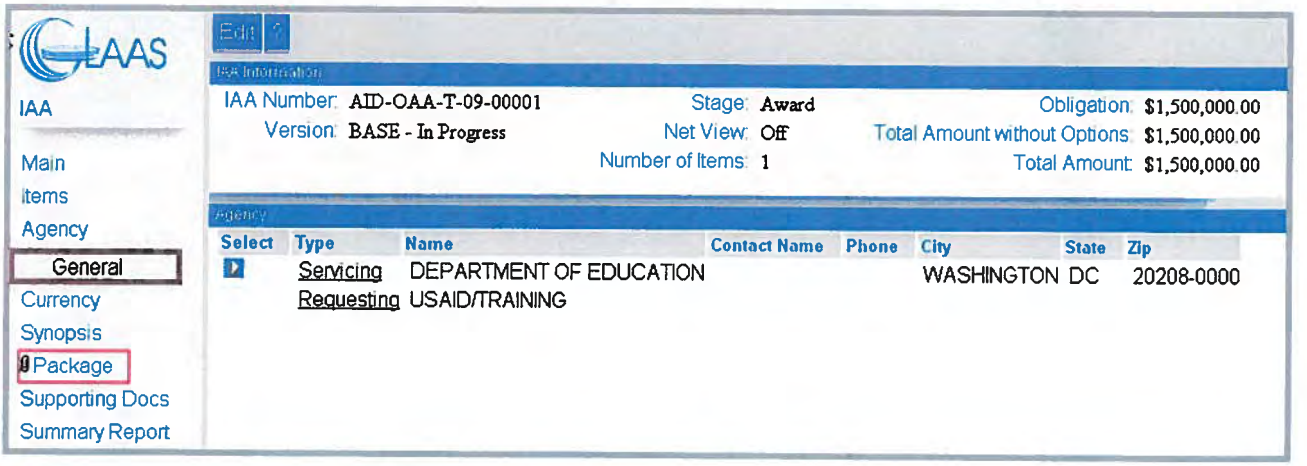


Figure 7: Agency / General Screen

Steps	Section	User Action	Guidance
13.	Agency / General	Click the **Package** link on the left-hand menu.	Refer to the *Filling out a Form* user guide for more detail on how select and edit the Cover Page.
14.	Package / Cover Page	Click the **Body** link on the left-hand menu (not shown).	

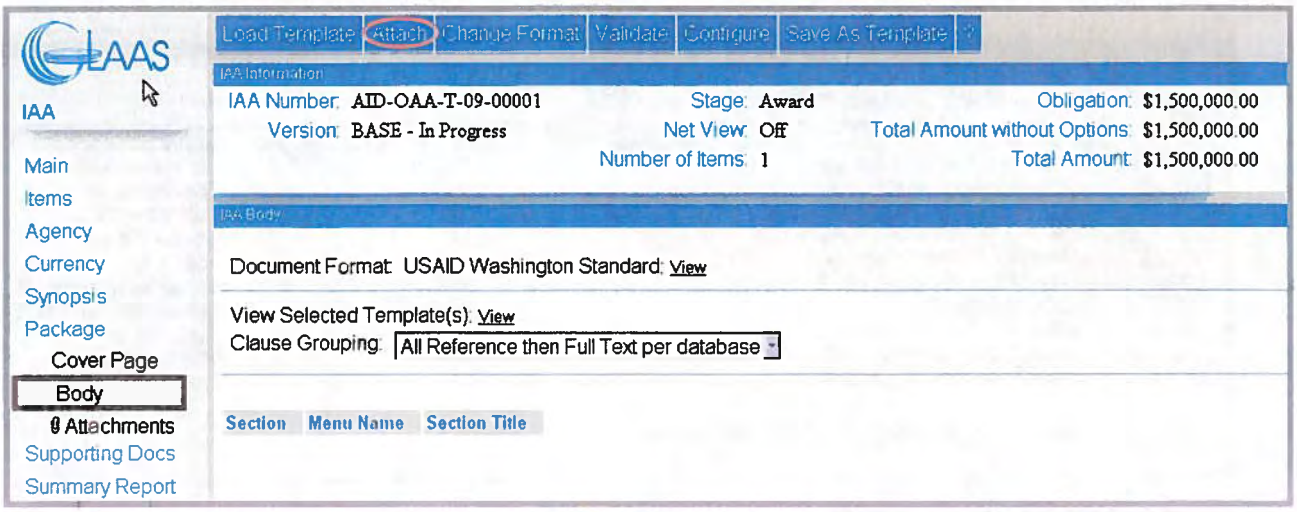


Figure 8: Package / Body Screen

Steps	Section	User Action	Guidance
15.	Package / Body	Click the **Attach** toolbar button to upload the IAA agreement document from your local hard-drive.	Do not use GLAAS to build your clauses and provisions for an IAA. The IAA agreement will be created outside the system and attached as the Body.

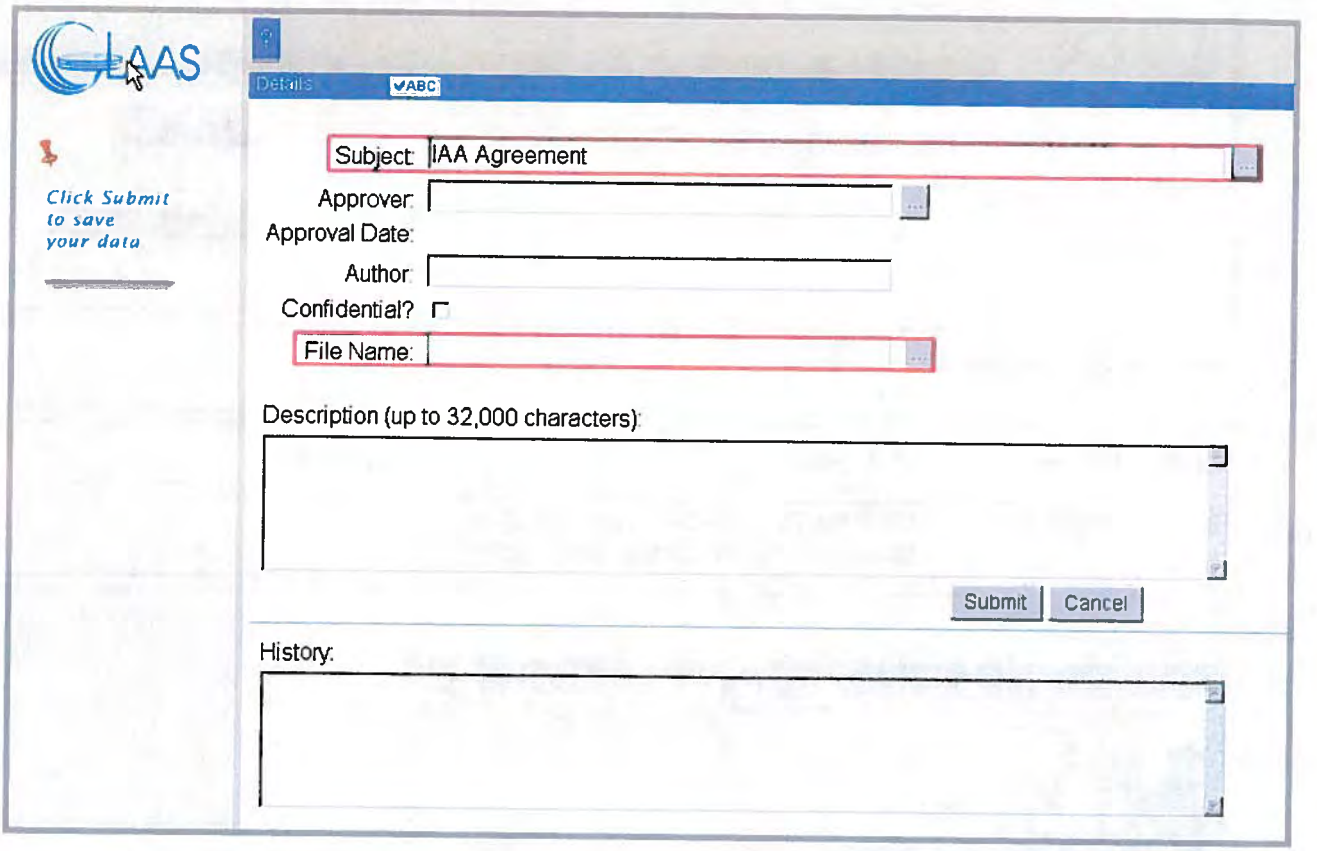


Figure 9: Details Screen

Steps	Section	User Action	Guidance
16.	Details	Complete the following Required (R) and/or Optional (O) fields: **Subject:** Enter a brief title for the attachment. — R **Approver:** Enter the User ID of the approver for this document. — O **Author:** Enter the document author's name. — O **Confidential:** Select this box if you want to limit the users who can view this attachment. — O **Description:** Enter a more detailed description of the attachment. — O	The system will auto-populate the **History** field with the history of the attachment.
17.	Details	Click the lookup button (...) next to **File Name** to search for the IAA agreement from your computer.	

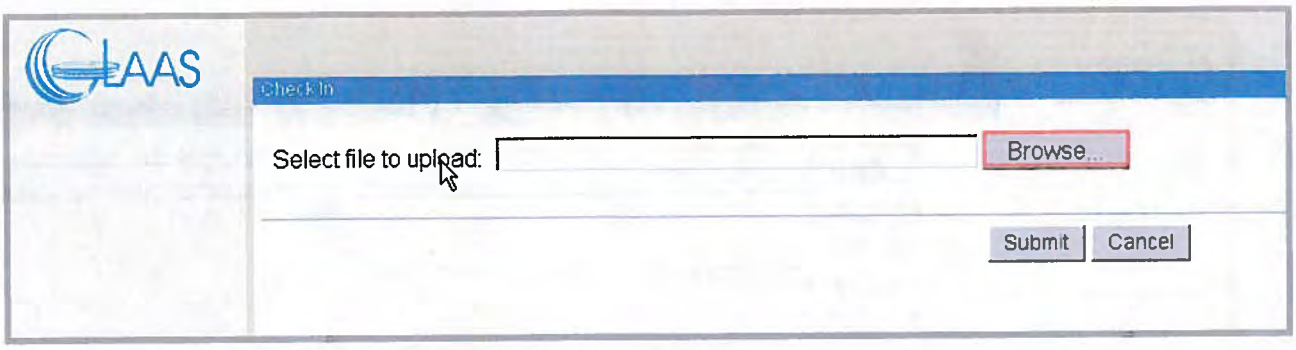


Figure 10: Check In Screen

Steps	Screen	User Action	Guidance
18.	Check In	Click the **Browse** button to search your hard drive for the correct file to upload.	

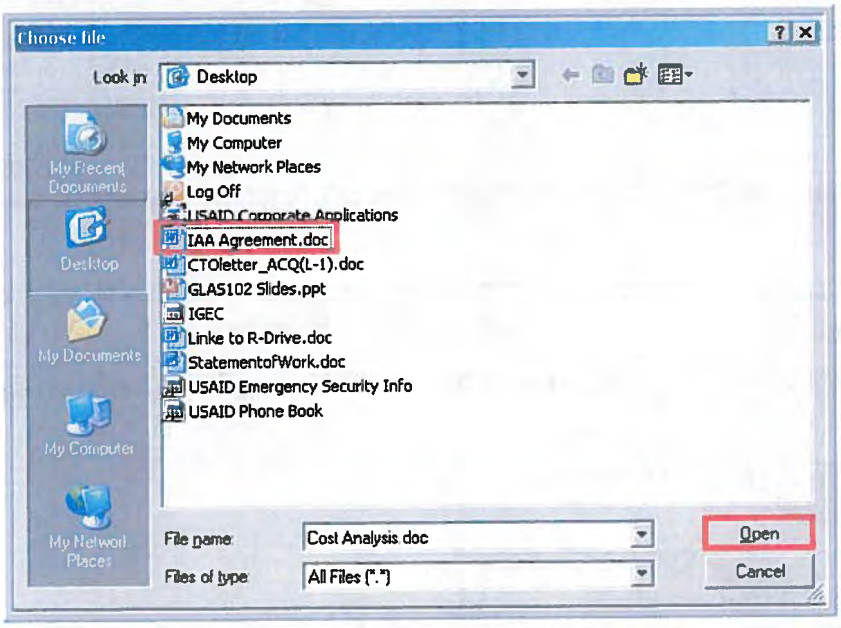


Figure 11: Choose File Screen

Steps	Screen	User Action	Guidance
19.	Choose File	Browse through your PC or network folders to find the file you want to attach to this GLAAS document. When you find the document, select it and click the **Open** button.	

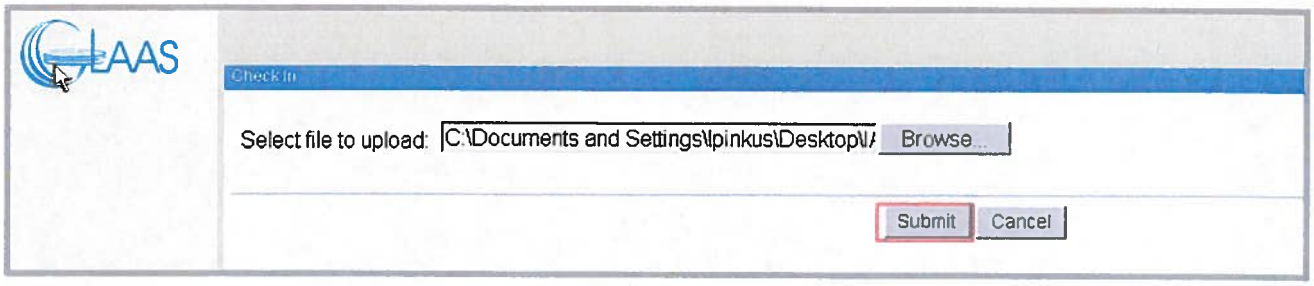


Figure 12: Check In Screen

Steps	Screen	User Action	Guidance
20.	Check In	Click the **Submit** button.	The network path of your attachment appears in the **Select file to upload** field.

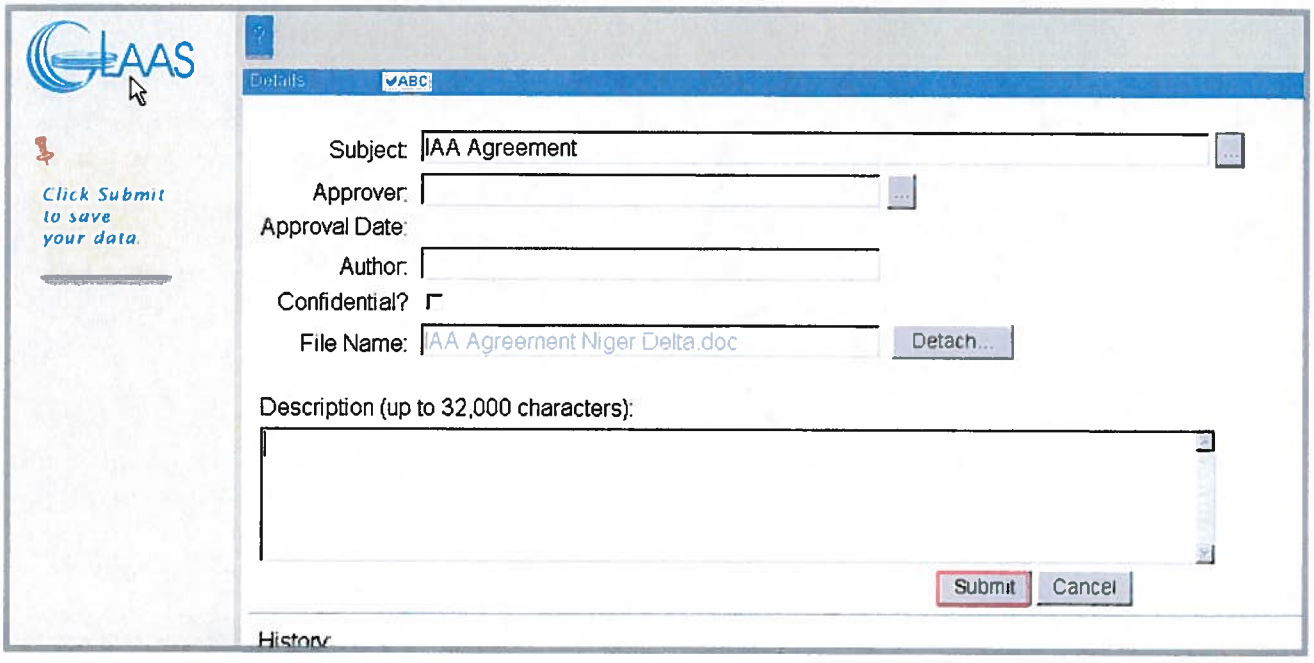


Figure 13: Details Screen

Steps	Screen	User Action	Guidance
21.	Details	Click the **Submit** button.	
22.	Package / Body	**Refer to the *Creating a Purchase Order* user guide to finish creating your IAA.**	

GLAAS 102 USER GUIDE:

CREATING A BLANKET PURCHASE AGREEMENT (BPA)

PURPOSE:

This user guide will show you how to create a Blanket Purchase Agreement (BPA) in GLAAS. Creating a BPA is like creating a regular Contract, except:

1. The initial BPA (the "BPA Setup") is created from an unfunded Requisition.
2. The BPA Setup has no line items.
3. The BPA has overall and per-order limits.
4. All obligations are done with BPA Calls.

BEFORE STARTING:

1. In order to create a BPA, you must be an A&A Specialist or Contracting Officer.
2. In order to approve or release a BPA, you must be a Contracting Officer.
3. You must have an approved and released Requisition in GLAAS in order to create a BPA.

STEPS:

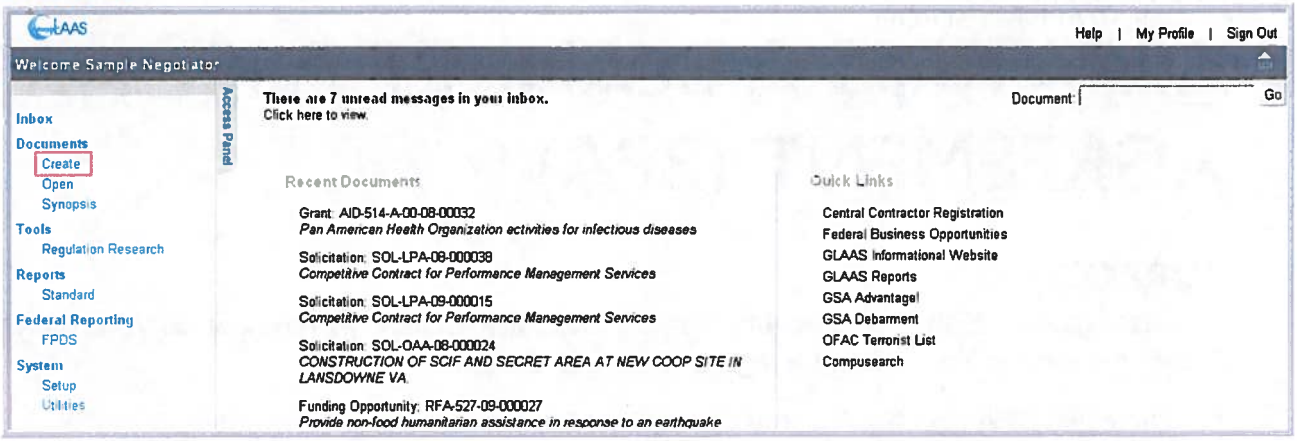


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel.**	

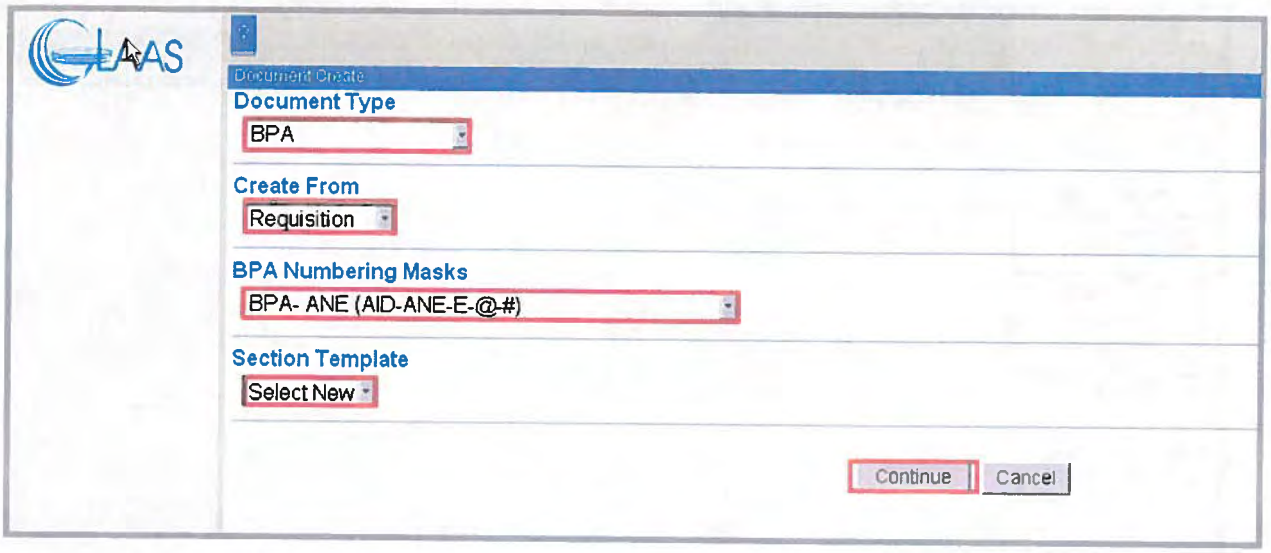


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "BPA." • **Create From:** Select "Requisition." • **BPA Numbering Masks:** Select a numbering mask that matches your site. • **Section Template:** Choose "Select New" to load a clause template. Selecting "None" will force the user to select a template later.	You must create a BPA from a Requisition and not a Solicitation. GLAAS will pull all of the general information and attachments forward from the Requisition into the BPA.
4.	Document Create	Click the **Continue** button.	

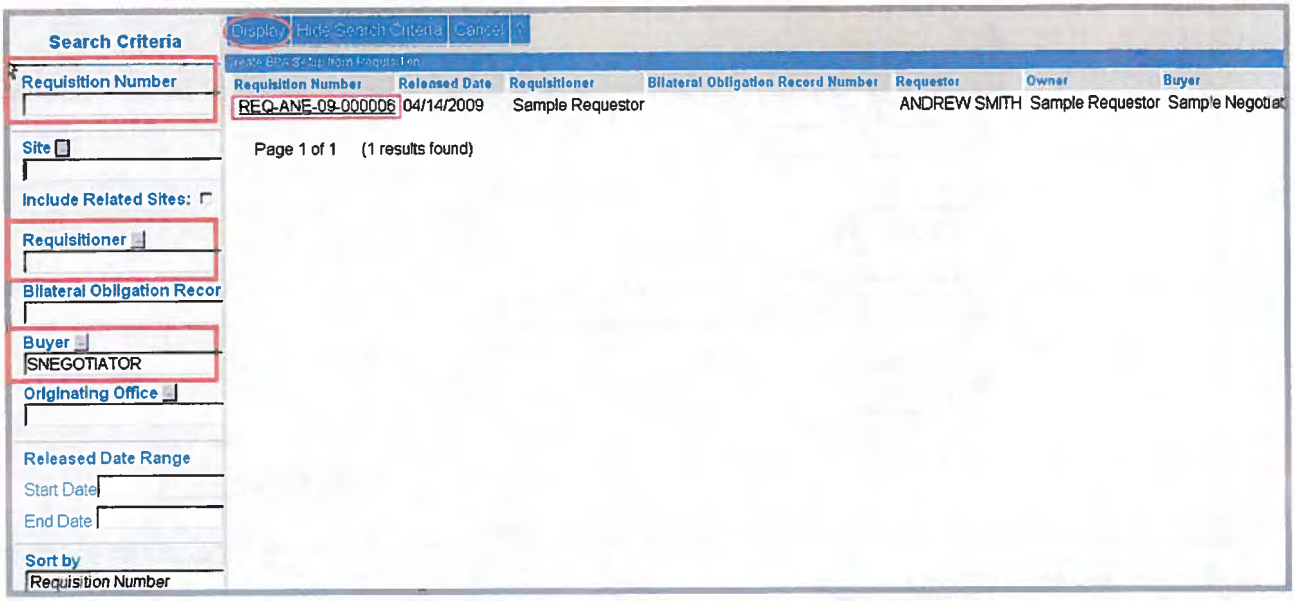


Figure 3: Create BPA Setup from Requisition Screen

Steps	Section	User Action	Guidance
5.	Create BPA Setup From Requisition	Clear the **Site** field and search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor.
6.	Create BPA Setup From Requisition	Click the correct **Requisition Number** link.	BPAs and the requisitions used to create them do not have line items.

Clause Template Selection

Template Name: SIM% Display Cancel

Site: USAID/TRAINING ☐ Include Related Sites ☑ Include Public

Max Results: 100 Results per Page: 5

Clause Template Name	Site
SIMPLIFIED ACQUISITION PROCEDURES	Public
SIMPLIFIED ACQUISITION PROCEDURES-AIDAR	Public

Page 1 of 1 (2 results found)

Section Selection

Include	Section Number	Section Title	Section Type
☐	A	Solicitation/Contract Form	Solicitation/Contract Form
☐	B	Supplies or Services/Prices	Supplies or Services and Prices
☐	C	Description/Specifications	Statement of Work
☐	D	Packaging and Marking	Packaging and Marking
☐	E	Inspection and Acceptance	Inspection and Acceptance
☐	F	Deliveries or Performance	Deliveries or Performance
☐	G	Contract Administration Data	Contract Administration Data
☐	H	Special Contract Requirements	Special Contract Requirements

Figure 4: Clause Template Selection Screen

Steps	Section	User Action	Guidance
7.	Clause Template Selection	Search for a Clause Template by **Template Name**. Click the **Display** button. Select a **Clause Template Name** link to display a list of clause sections in the lower section of the screen.	Clause Templates include the basic FAR and AIDAR clauses for a BPA. You must add the FAR clauses first; you will add the AIDAR clauses later. AIDAR templates always display "AIDAR" in the template name.

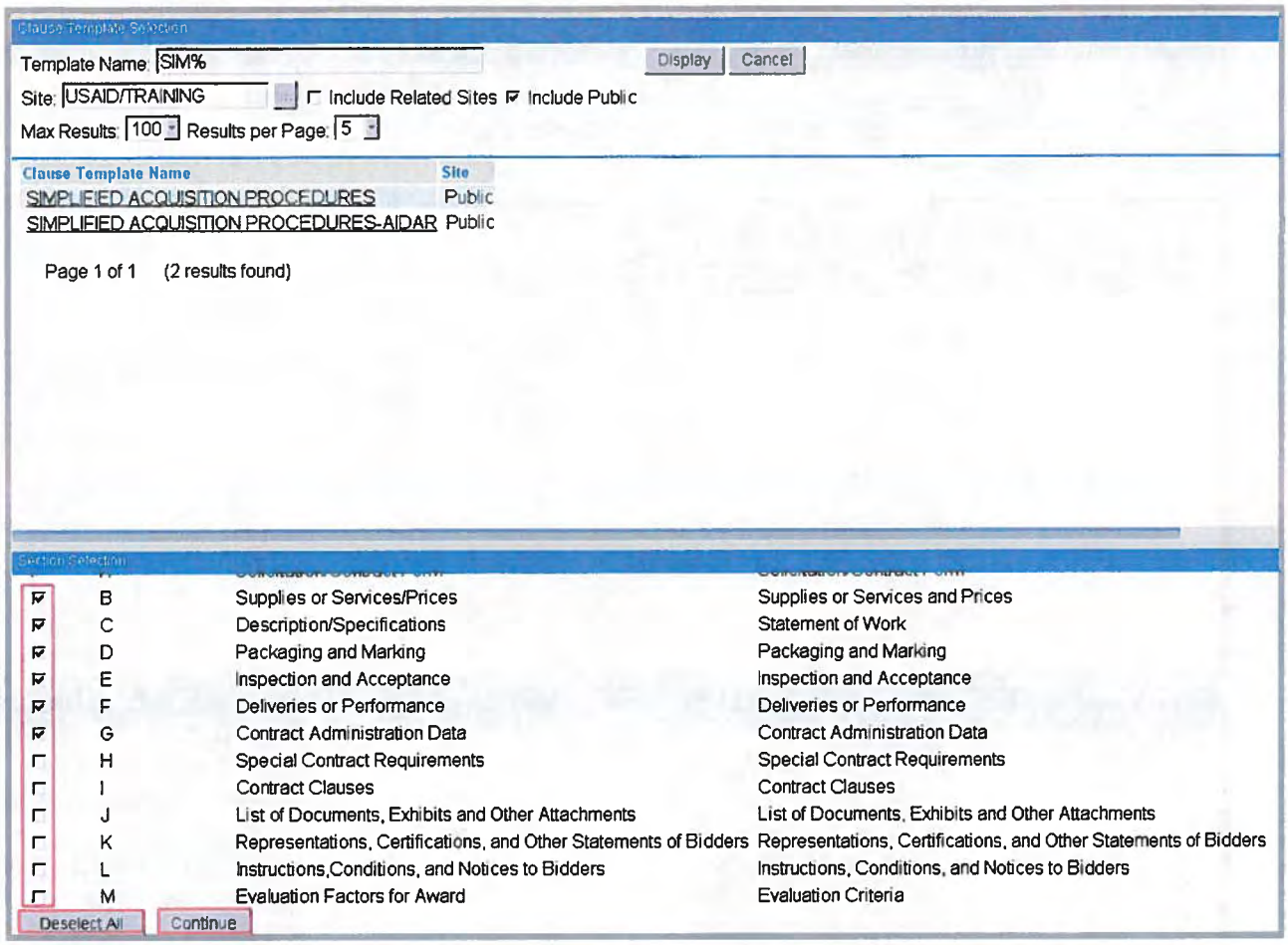


Figure 5: Clause Template Selection Screen

Steps	Section	User Action	Guidance
8.	Clause Template Selection	Review the clause sections available in the template by viewing the bottom **Section Selection** window. Click the **Select All** button to include all of the clause sections in your BPA. OR Check or uncheck the boxes to select clause sections one at a time.	The *Working with Clauses* user guide shows you how to add, change and remove clauses from a GLAAS document. If this is a Uniform Contract Format (UCF) template (Sections A – M), all the sections will be loaded into your document regardless if you actually selected the section. There will be an opportunity to load or delete clause templates later in the BPA Package / Body.
9.	Clause Template Selection	Click the **Continue** button to pull the clauses into your BPA.	

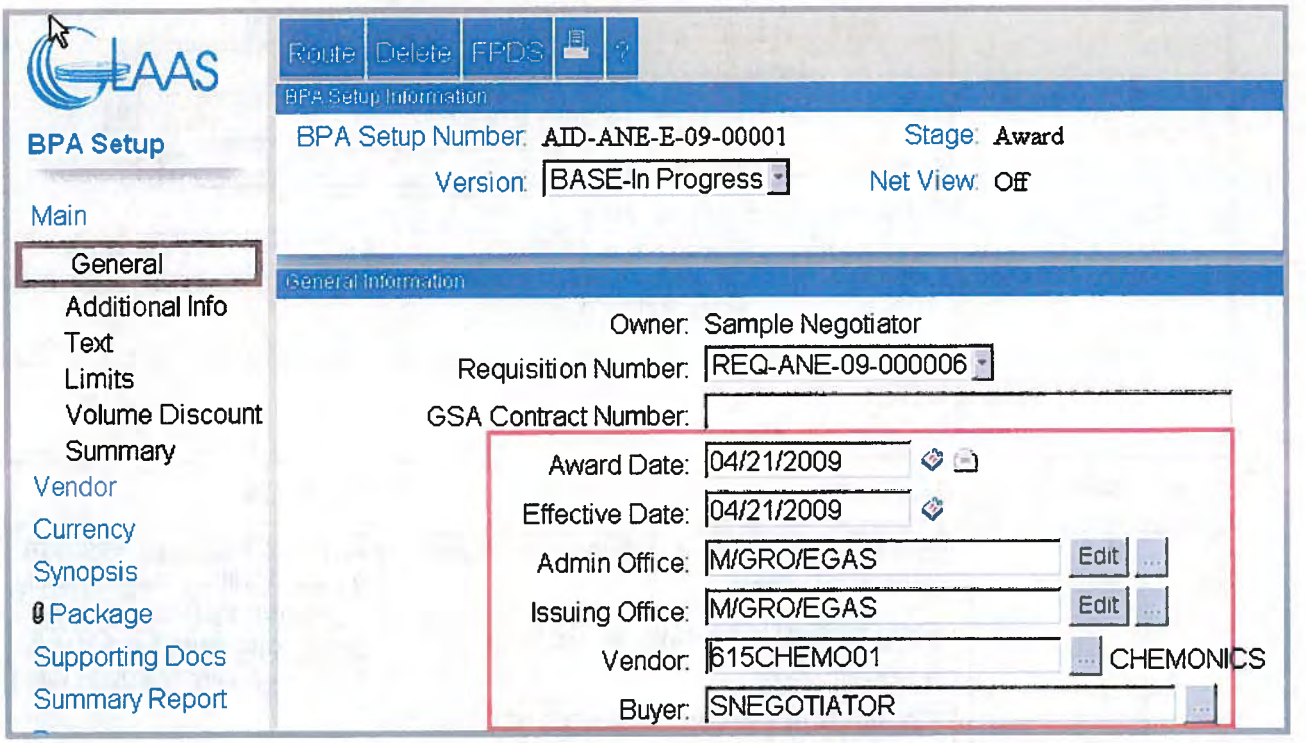


Figure 6: Main / General Screen

Steps	Section	User Action	Guidance
10.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **GSA Contract Number:** Enter the GSA Contract Number if this BPA is registered with GSA. — O **Award Date:** Enter the date the award is signed. — R **Effective Date:** Enter the date the award (or current modification) will become effective. — R **Admin Office:** Select the code for the COTR's office. — R **Issuing Office:** Select the code for the contracting office. — R **Vendor:** Select the Vendor code for this award. — R **Buyer:** Select the A&A Specialist for this award. — R	GLAAS will auto-populate various fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Use the **Edit** button (Edit) to modify how office addresses will appear on forms. Vendors assigned one of three special DUNS numbers in Phoenix will have their Vendor Name obscured in FPDS-NG: • For a sensitive domestic contractor, assign DUNS 790238638 • For a sensitive foreign contractor, assign DUNS 790238851 • For a miscellaneous foreign contractor, assign DUNS 123456787

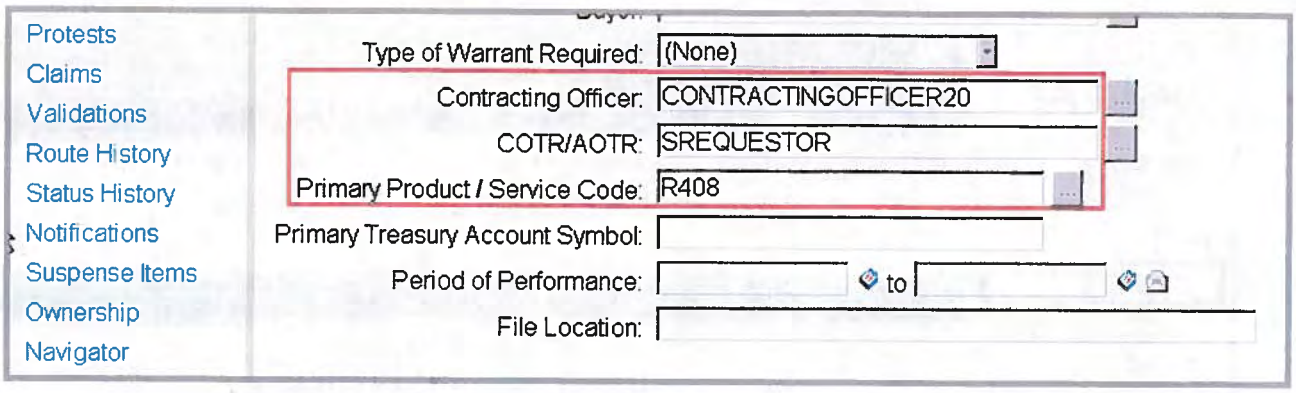


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
10. cont.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Type of Warrant Required:** Select a warrant level. — O **Contracting Officer:** Select the CO for this award. — R **COTR/AOTR:** Select the **COTR** for this award. — R **Primary Product/Service Code:** Select the code for the goods or services on the award used to report to the Federal Procurement Data System-Next Generation (FPDS-NG). — R **Period of Performance:** Enter the effective and completion dates. — O **File Location:** Enter a short description of the location of the paper or electronic file. — O	**Primary Treasury Account Symbol** will be automatically populated by Phoenix once validations have been done. (Do NOT manually populate this field.)
11.	Main / General	Click the **Additional Info** link on the left-hand menu (not shown).	

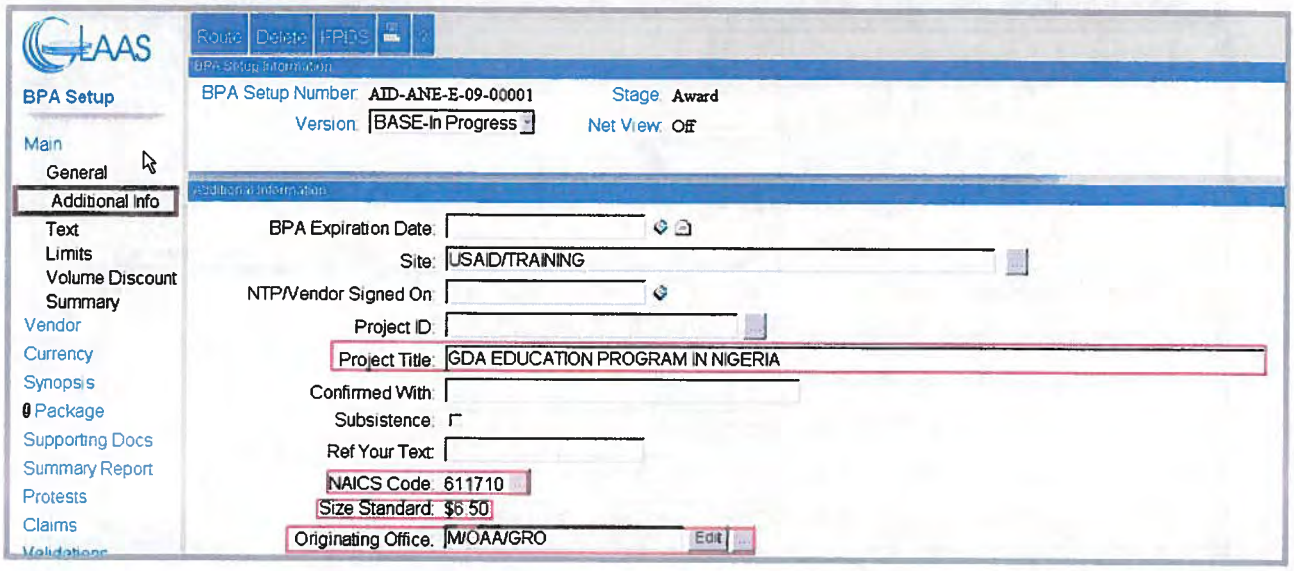


Figure 8: Main / Additional Info Screen

Steps	Section	User Action	Guidance
12.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **NTP/Vendor Signed On:** Enter the date the "Notice to Proceed" was issued or the date the vendor acknowledged the order. — O **Project Title:** The Project Title will populate from the Requisition if it was associated to an APP. If not, please fill in the Project Title. — R Use this field if you want the system to print on the award: "Do not duplicate, confirm order with _____." — O **Subsistence:** Check the box if the award is for food or shelter. — O **Ref to Text:** Type the vendor's quote number or another indicator that might help the vendor locate the information in the future. — O **NAICS Code:** Select the appropriate code from the list. — R **Originating Office:** Select the code for the requesting office. — R	USAID is not currently using these fields: • **Project ID** • **BPA Expiration Date** **Site** defaults to the office/site of the user who made the request. **Size Standard** will auto-populate when the **NAICS Code** is selected. Use the **Edit** button (Edit) to modify how the office address will appear on the award.

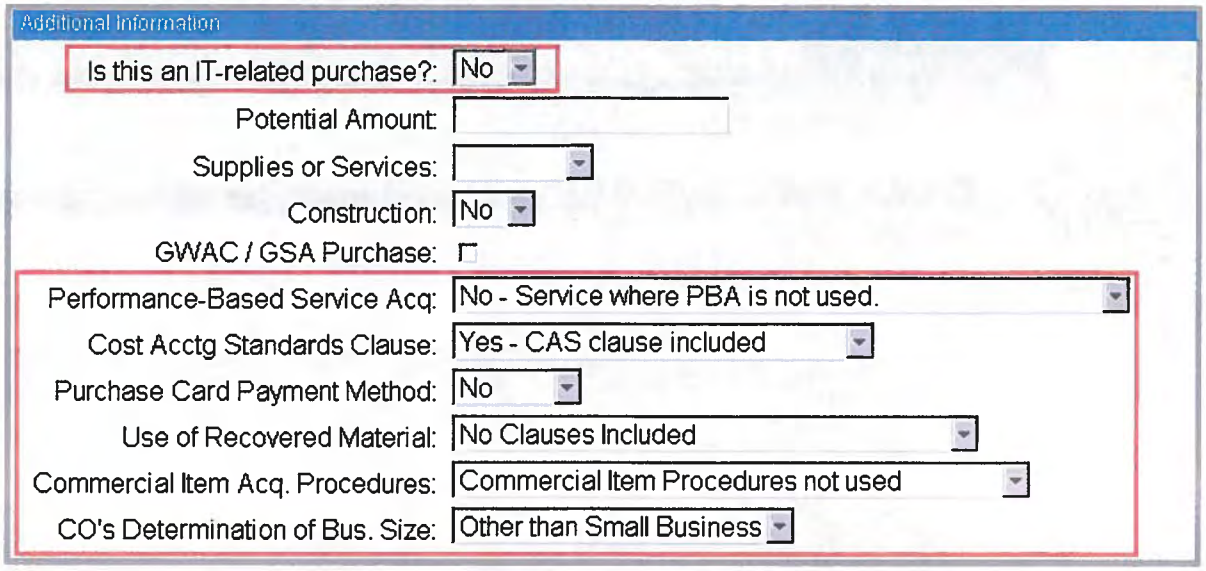


Figure 9: Main / Additional Info Screen

Steps	Section	User Action	Guidance
12. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Is this an IT-related purchase?:** Select "Yes" if this is related to an IT purchase. — R **Performance-Based Services Acq:** Select the appropriate value from the dropdown list. — R **Cost Acctg Standards Clause:** Select the appropriate value from the dropdown list. — R **Purchase Card Payment Method:** Select "Yes" if a purchase card was used. — R **Use of Recovered Material:** Select the appropriate value from the dropdown list. — R **Commercial Item Acq. Procedures:** Select the appropriate value from the dropdown list. — R **CO's Determination of Bus. Size:** Select the appropriate value from the dropdown list. — R	USAID is not currently using these fields (not shown): • **Potential Amount** • **Supplies or Services** • **Construction** • **GWAC / GSA Purchase**

Additional Information

Preferences

SBA Contract Number:

FPDS NG

Report to FPDS as a Stand-alone Contract: ☑

PIID	Reference PIID	FPDS Approval Number	Date Finalized
(None)			

Figure 10: Main / Additional Info Screen

Steps	Section	User Action	Guidance
13. cont.	Main / Additional Info	Complete the following Required (R) and/or Optional (O) fields: **SBA Contract Number:** Type the SBA contract number, if applicable. — R/O **Report to FPDS as a Stand-alone Contract:** Check the box if you do not wish to issue Delivery/Task Orders against this Contract. — R/O	Once the system interfaces with FPDS-NG, it will auto-populate the **PIID** and the **FPDS Approval Number**.

Additional Information	
GDA Flag:	YES
Payment method:	DIRECT
Environmental Determination Document Name:	DCN-EGAS-05-02
Place of Performance:	000
Authorized Geographical Code:	000
22 CFR 216 Compliance Status:	APPROVED BY BEO
Benefiting Country Code:	620
Subcontract/Subgrant Plan Required:	NO

Figure 11: Main / Additional Info Screen

Steps	Section	User Action		Guidance
12. cont.	Main/ Additional Info	Complete the following Required (R) and/or Optional (O) fields:		The lower portion of the **Additional Info** screen contains USAID-specific "flex fields." GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. If you are manually entering values instead of using the lookup button (...), you must type the value exactly as it appears in the system and in all uppercase letters.
		GDA Flag: Select "YES" if this action is for a Global Development Alliance initiative.	R	
		Payment Method: Select from the list how the award will be paid.	R	
		Environmental Determination Document Name: Enter a document title (if applicable), otherwise enter "N/A."	R	
		Place of Performance: Select the three-digit code indicating the country where the work will be performed.	R	
		Authorized Geographical Code: Select the three-digit code indicating the country that is authorizing the work to be done.	R	
		22 CFR 216 Compliance Status: Select an environmental compliance status code.	R	
		Benefiting Country Code: Select the code of the one country, or region (if applicable), that will benefit most from this action.	R	
		Subcontract/Subgrant Plan Required: Select "YES" if a subcontract/subgrant plan is required.	R	

Performanced Based Contract/Results Oriented Grant:	NO
Name of Subcontractor/Subgrantee:	
Vessel Flag Priority:	
Leveraging:	
Grants Under Contract/Contracts Under Grant:	
COTR/AOTR Assigned Date:	04/21/2009
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?:	YES

Figure 12: Main / Additional Info Screen

Steps	Section	User Action	Guidance
12. cont.	Main/ Additional Info	Complete the following Required (R) and/or Optional (O) fields:	

Performance Based Contract/Results Oriented Grant: Select "YES" if this will be a performance-based contract.	R
Name of Subcontractor/Subgrantee: Enter the name of the subcontractor if applicable.	O
Vessel Flag Priority: Enter the flag priority, if applicable.	O
Leveraging: Enter a value if this award was leveraged, if applicable.	O
Grants Under Contract/Contracts Under Grant: Select "YES" if Grants Under Contract (GUCs) is authorized.	O
COTR/AOTR Assigned Date: Enter the date that the COTR was assigned to this award.	R
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties? Select "YES" or "N/A."	R
Has a hard copy been placed in the OAA contract award file? Select "YES" or "N/A."	R

Acctg Period:	
Reporting Acctg Period:	
Action Type:	CA1
Award TEC:	2500000
AIDAR/Agency Exemptions to Competition:	0
Competition (Yes/No):	YES

Figure 13: Main / Additional Info Screen

Steps	Section	User Action		Guidance
12. cont.	Main/ Additional Info	Complete the following Required (R) and/or Optional (O) fields:		You must select "BPA" as the **Action Type** for all BPA Setups or you will receive an error message from Phoenix.
		Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Reporting Acctg Period: If blank, the financial interface will default to the current accounting period. If the Effective Date of the award is outside the current accounting period, enter the two-digit fiscal month and four-digit fiscal year in MM/YYYY format.	O	
		Action Type: Select "BPA" as the code identifying the type of award action.	R	
		Award TEC: Enter the Total Estimated Cost of the Award.	R	
		AIDAR/Agency Exemptions to Competition: Select a code to identify the type of exemption, or select "0" if the award is competitive.	R	
		Competition (Yes/No): Select "YES" or "NO" to indicate if this action will be competed or not.	R	

Earmark/Directive/Other:	N/A
Earmark/Directive/Other Description:	
Requisition Number (for mods only):	0

Figure 14: Main / Additional Info Screen

Steps	Section	User Action	Guidance
12. cont.	Main/ Additional Info	Complete the following Required (R) and/or Optional (O) fields: **Earmark/Directive/Other:** Select a value to indicate if this award action is based on Congressional Earmark, Presidential Directive, or other mandate. Select "N/A" if not applicable. — R **Earmark/Directive/Other Description:** Enter a short description of the Earmark, Directive or other mandate for the award when applicable. — R **Requisition Number (for mods only):** If this is a modification, select the Requisition number. If this is a new award, select "0" for "Not Applicable." — R	You must select "BPA" as the **Action Type** for all BPA Setups or you will receive an error message from Phoenix.
13.	Main/ Additional Info	Click the **Text** link on the left-hand menu (not shown).	

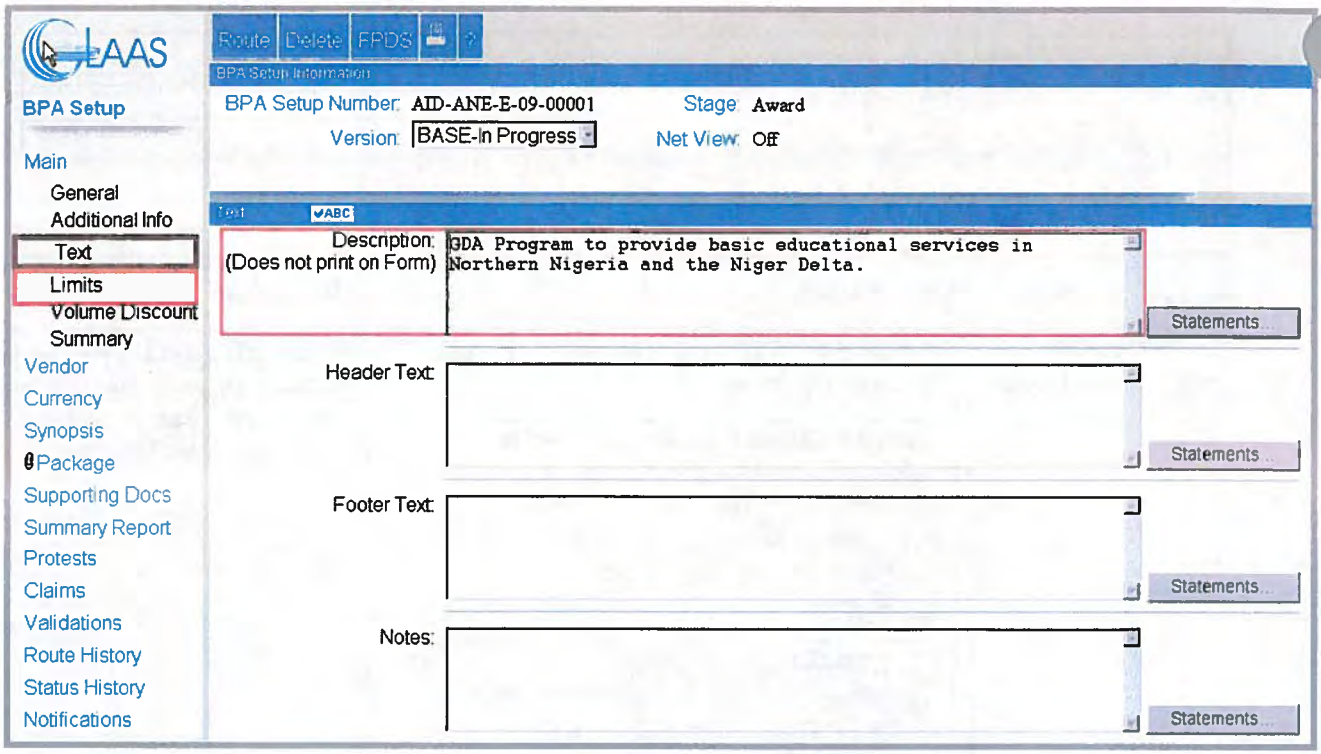


Figure 15: Main / Text Screen

Steps	Section	User Action	Guidance
14.	Main / Text	Complete the following Required (R) and/or Optional (O) fields: **Description:** Enter a short description of the item or services that are going to be purchased with this BPA. This will not print on the BPA. — R **Header Text:** Enter a short (50 characters or less) description of the BPA. This will print out once at the top of the schedule on the BPA. — O **Footer Text:** Will print out once at the bottom of the schedule on the BPA. — O **Notes:** Enter any additional text for the award. This will not print on the BPA. — O	**WARNING!** Do not enter sensitive procurement information in the **Description** field. Each text field will hold up to seven typed pages. The first 255 characters of the **Description** will carry over to the Description field in Phoenix. The first 50 characters of the **Header Text** will carry over to the Title field in Phoenix. The **Statements** button contains standard language and can be edited once loaded in the field.
15.	Main / Text	Click the **Limits** link on the left-hand menu.	

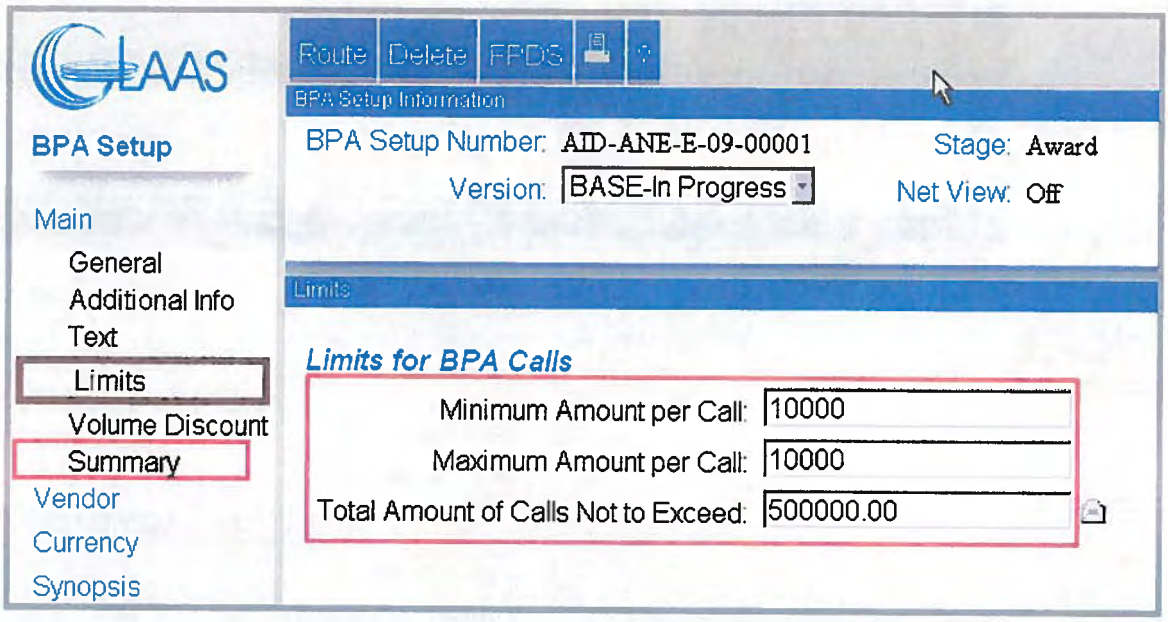


Figure 16: Main / Limits Screen

Steps	Section	User Action	Guidance
16.	Main / Limits	Complete the following Required (R) fields: **Minimum Amount per Call**: Enter the minimum amount you want to establish for each call. — R **Maximum Amount per Call**: Enter the maximum amount you want to establish for each call. — R **Total Amount of Calls Not to Exceed**: Enter the total ceiling for this BPA. — R	Use the notifications button ( ) to create a Notification for the **Total Amount of Calls Not to Exceed** field.
17.	Main / Limits	Click the **Summary** link on the left-hand menu (not shown).	

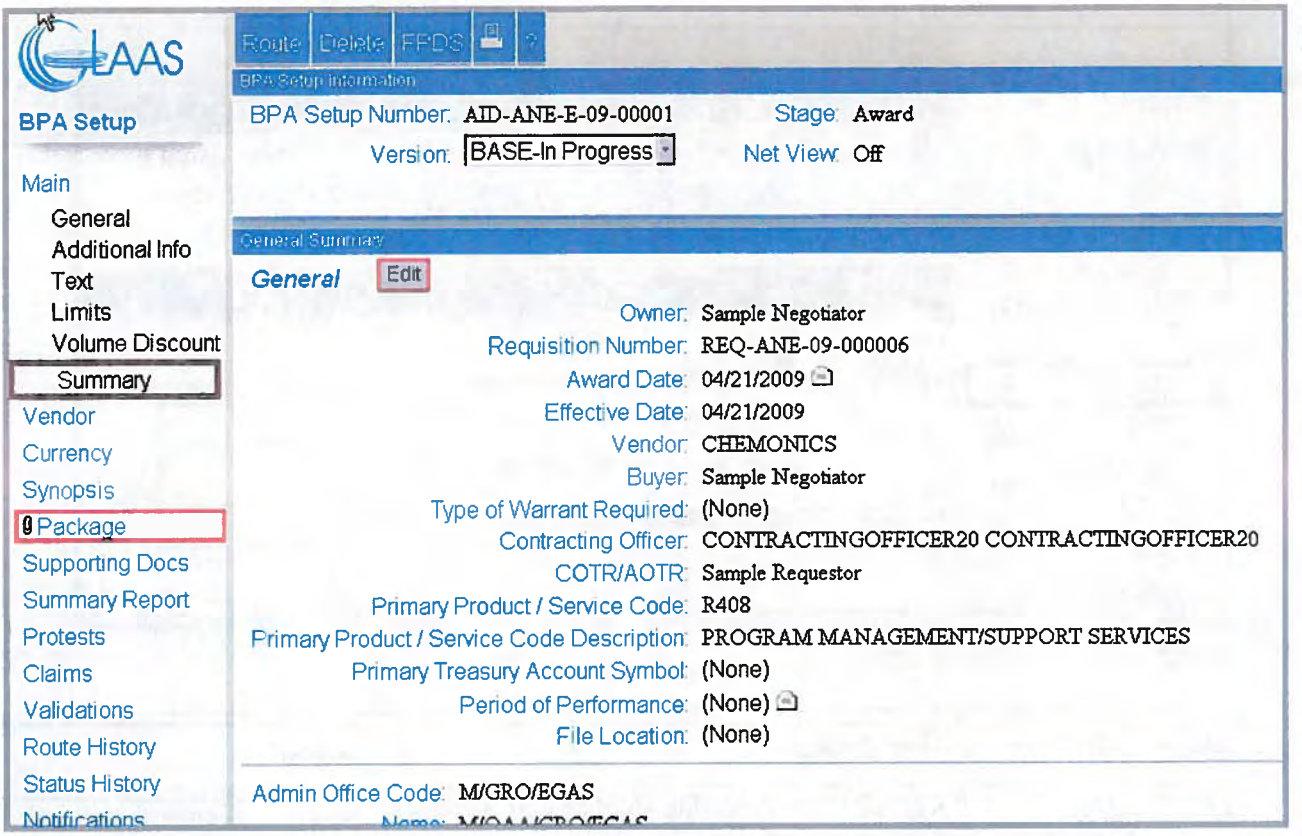


Figure 17: Main / Summary Screen

Steps	Section	User Action	Guidance
18.	Main / Summary	Review the information on this screen for accuracy.	At the **Summary** screen you are not required to enter any information. It is just a helpful checkpoint for you to review the information that you have entered on your document thus far. Click the various **Edit** buttons (Edit) to make any changes.
19.	Main/ Summary	Click the **Package** link on the left-hand menu.	The BPA does not have an **Items** screen. You enter the specific items you want to buy on each BPA call. Please refer to the *Creating a BPA Call* user guide for use of line items on BPAs. To fill out information under the **Vendor**, **Currency**, **Synopsis**, and **Supporting Docs** links, please refer to the *Creating a Contract from a Requisition* user guide.

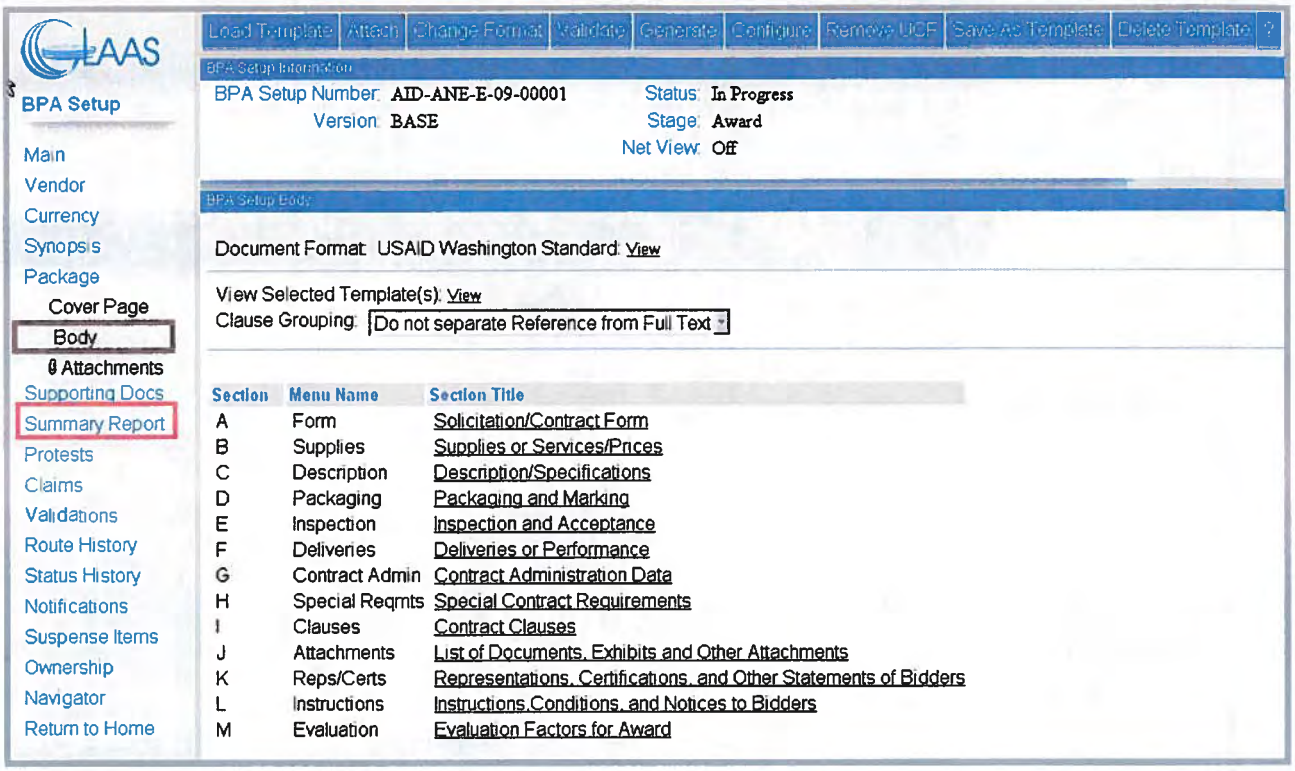


Figure 18: Package / Cover Page Screen

Steps	Section	User Action	Guidance
20.	Package / Cover Page	Click the **Body** link on the left-hand menu.	
21.	Package/ Body	Review the clause information and grouping on this screen for accuracy.	Use this screen to update, change or delete clauses for the BPA. The *Working with Clauses* user guide explains how to work with GLAAS Clause Templates in more detail.
22.	Package/ Body	Click the **Summary Report** link on the left-hand menu.	

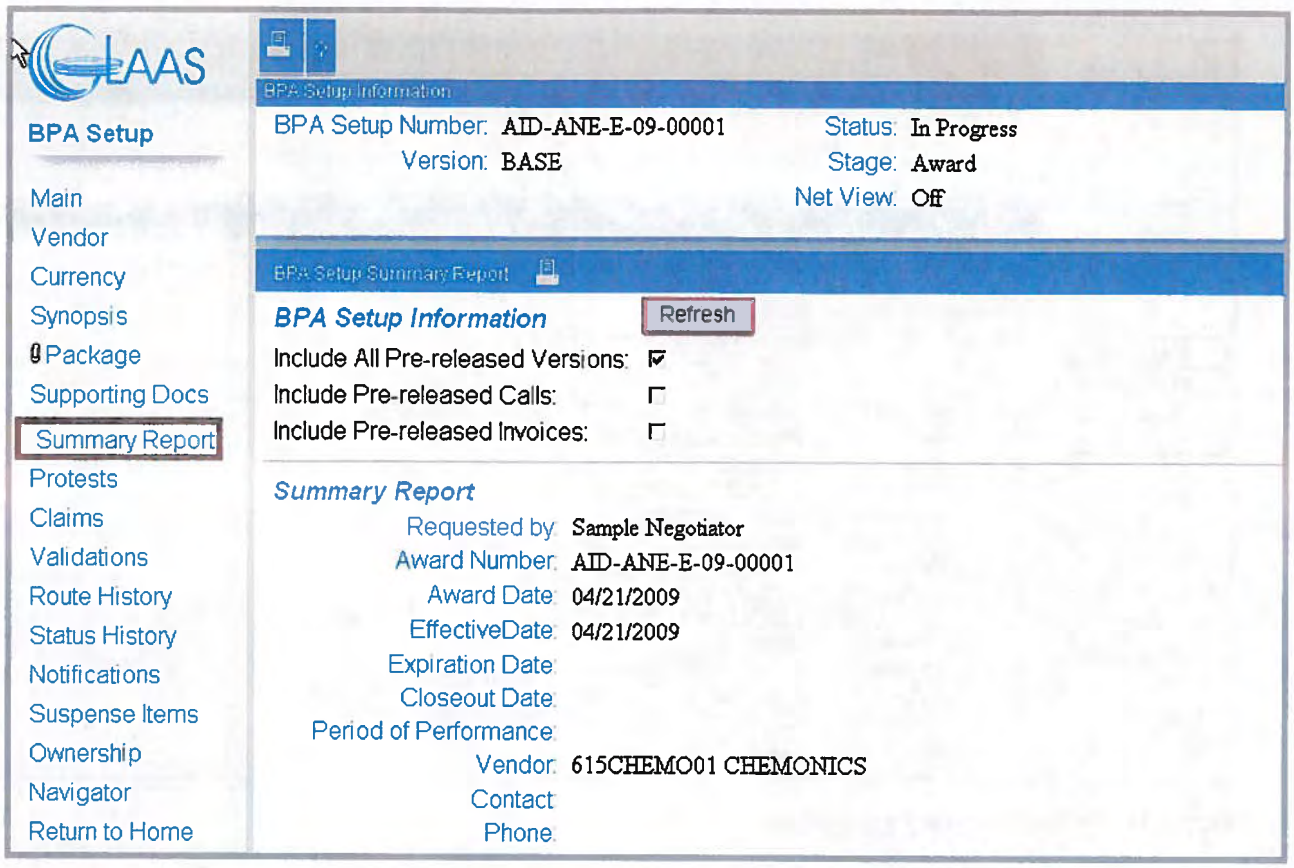


Figure 19: Summary Report Screen

Steps	Section	User Action	Guidance
23.	Summary Report	Review the BPA information for accuracy. Check the **Include All Pre-released Versions** box and then click the **Refresh** button to review Pre-released information.	The BPA Setup **Summary Report** screen shows a high-level summary of the BPA. If changes need to be made, use the left-hand menu to go to the section which needs to be corrected. **Include Pre-released Versions** will allow you to see how any unreleased modifications of the BPA will affect the summary report prior to release. USAID is not currently using the **Include Pre-released Invoices** field.

BPA Setup Summary Report

Include Pre-released Calls: ☐
Include Pre-released Invoices: ☐

Summary Report

Requested by: Sample Negotiator
Award Number: AID-ANE-E-09-00001
Award Date: 04/21/2009
EffectiveDate: 04/21/2009
Expiration Date:
Closeout Date:
Period of Performance:
Vendor: 615CHEMO01 CHEMONICS
Contact:
Phone:
Buyer: Sample Negotiator
Phone:
Contracting Officer: CONTRACTINGOFFICER20 CONTRACTINGOFFICER20
Phone:
Minimum Amount Per Call: $10,000.00
Maximum Amount Per Call: $10,000.00
Total Calls Not to Exceed: $500,000.00
Number of Modifications: 0
Last Modification Date:
Modification Number:
Invoiced Amount: $0.00

Call Summary
None

Figure 20: Summary Report Screen

Steps	Section	User Action	Guidance
24.	Summary Report	Review the **Call Summary** section.	The **Call Summary** section shows every BPA Call against this BPA (if created), and also contains the limits you set on your BPA Calls and any modifications on the BPA.
25.	Summary Report	Click the **Validations** link on the left-hand menu (not shown).	The **Protests** and **Claims** links on the left-hand menu will contain any protests or claims that were recorded. These can be reviewed, added to or updated (not shown).

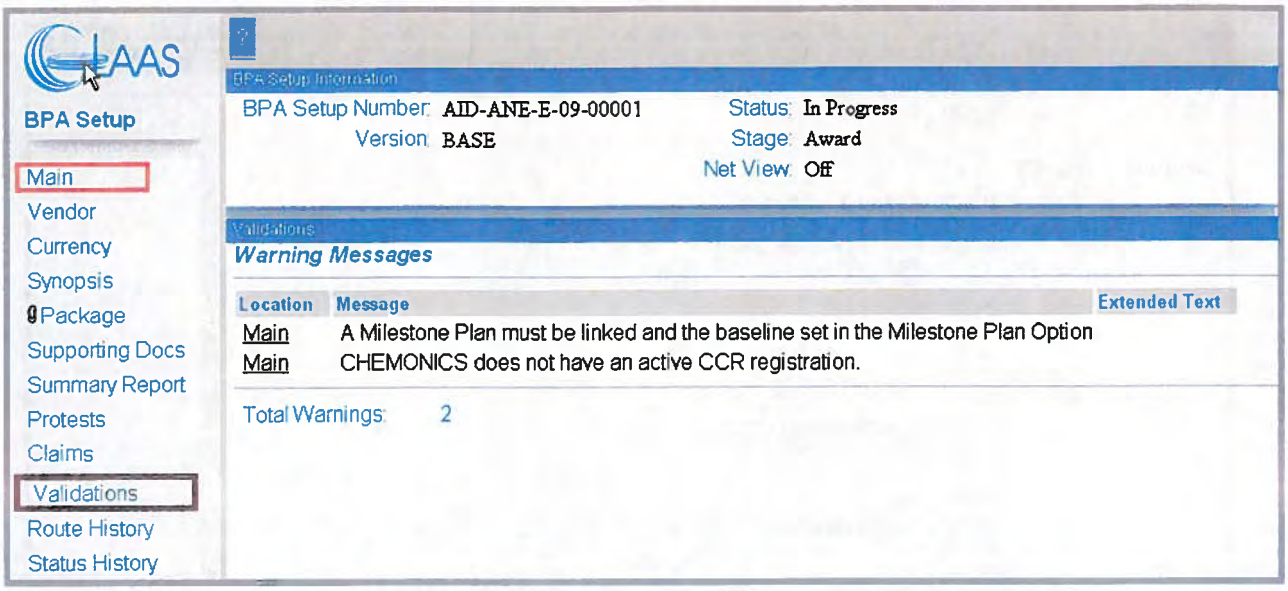


Figure 21: Validations Screen

Steps	Section	User Action	Guidance
26.	Validations	Correct the errors or warnings and then click the **Validations** link again to re-validate the Award (not shown).	The **Validations** screen appears with a list of **Error Messages** and/or **Warning Messages**. **Error Messages** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it.
27.	Validations	Click the **Main** link on the left-hand menu.	

Figure 22: Main / General Screen

Steps	Section	User Action	Guidance
28.	Main / General	Click the **FPDS** toolbar button to edit the FPDS-NG record (not shown). Click the **Validate** button at the top of the FPDS-NG record window (not shown). Complete the required fields (not shown). Click the **Save** button and close the browser window (not shown).	The A&A Specialist is responsible for populating the FPDS-NG record. The Contracting Officer is responsible for approving the FPDS-NG record. The Award cannot be approved and released without a valid FPDS-NG record. All awards over $3,000 must be reported to FPDS-NG. Refer to the *Creating FPDS-NG Records Through GLAAS* user guide for additional information about completing the FPDS-NG submission.
29.	Main / General	Click the **Route History** link on the left-hand menu (not shown).	

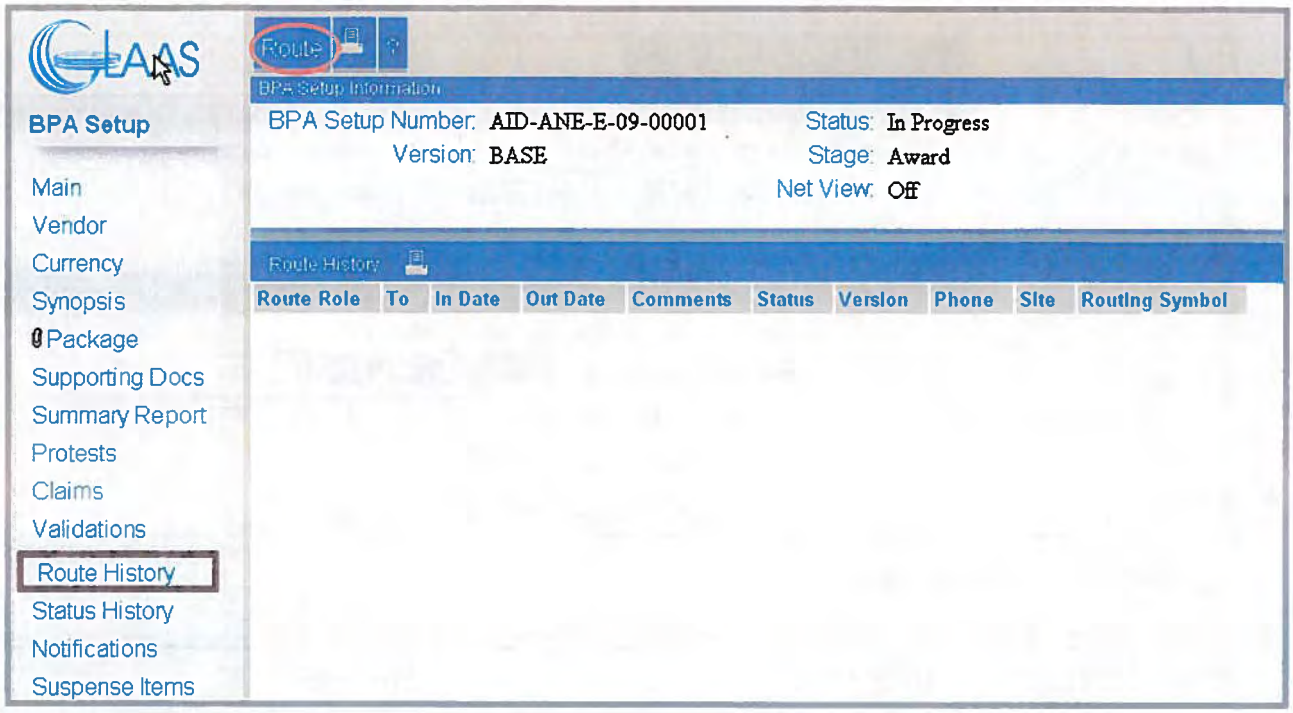


Figure 23: Route History Screen

Steps	Section	User Action	Guidance
30.	Route History	Click the **Route** toolbar button to begin the routing process (not shown).	The **Route** toolbar button allows the user to forward documents to other GLAAS users for review and approval. A&A Specialists must route all documents for **Approval** to the Contracting Officer. You can create routing list templates in **My Profile**. Refer to the *Routing a Document* user guide for further instructions.
31.	Route History	Click the **Return To Home** link on the left-hand menu (not shown).	

After the BPA Setup has been approved and released by the CO, open the BPA document and complete the following steps giving the Admin Office access to the BPA.

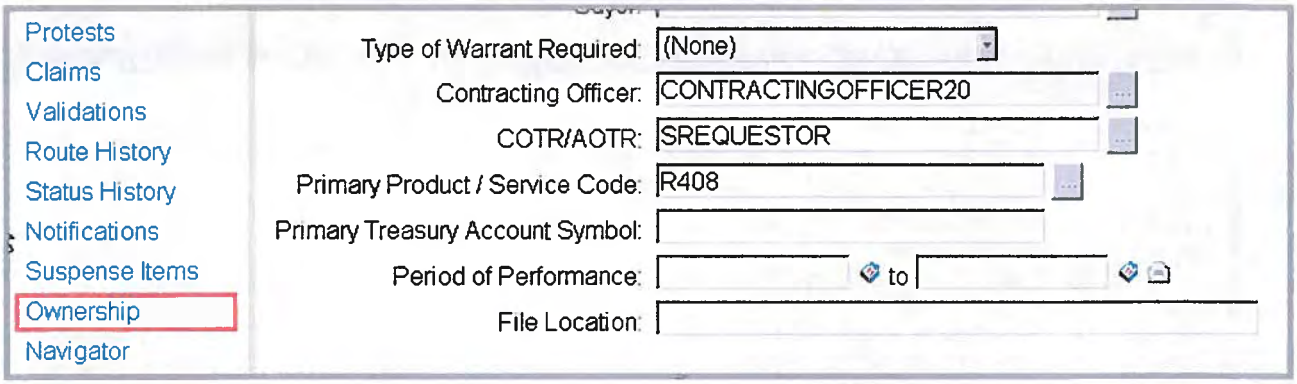


Figure 24: Main / General Screen

Steps	Section	User Action	Guidance
32.	Main / General	Click the **Ownership** link on the left-hand menu.	
33.	Share Document	Click the **Edit** toolbar button (not shown).	

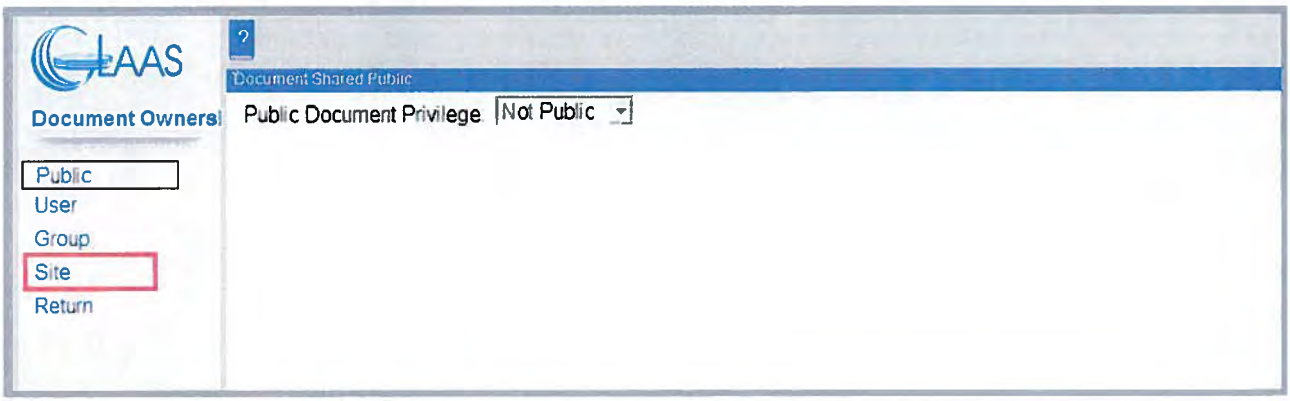


Figure 25: Document Shared Public Screen

Steps	Section	User Action	Guidance
34.	Document Shared Public	Click the **Site** link on the left-hand menu	
35.	Document Shared Site	Click the **Add** toolbar button (not shown).	

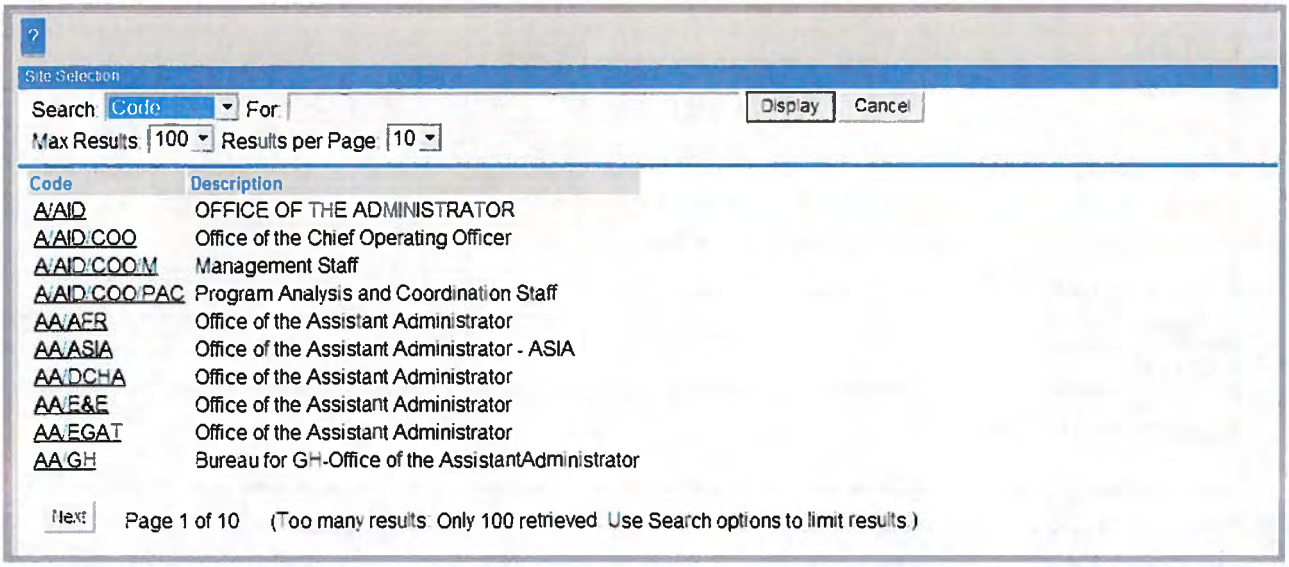


Figure 26: Site Selection Screen

Steps	Section	User Action	Guidance
36.	Site Selection	Search for and select the COTR's site.	This is the same as the **Admin Office** on the **Main / General** screen.

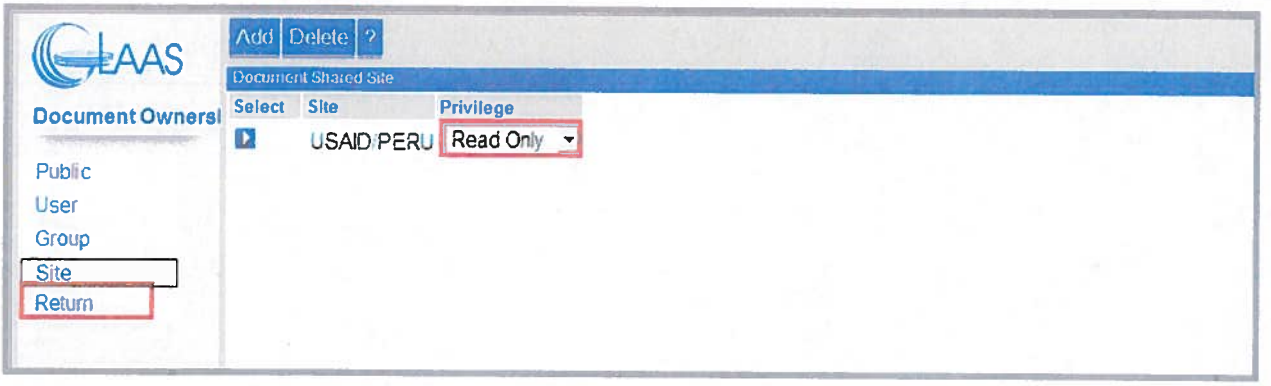


Figure 27: Document Shared Site Screen

Steps	Section	User Action	Guidance
37.	Document Shared Site	Ensure the **Privilege** is Read Only.	This will allow the **Admin Office** to view the released award, and access it to create modifications and BPA Calls.
38.	Document Shared Site	Click the **Return** link on the left-hand menu.	
39.	Ownership	Click the **Return to Home** link on the left-hand menu (not shown).	

GLAAS 102 USER GUIDE:

CREATING A BPA CALL

PURPOSE:

This user guide will show you how to create a Blanket Purchase Agreement (BPA) Call.

BEFORE STARTING:

1. In order to create a BPA Call, you must be an A&A Specialist or a Contracting/Agreement Officer.
2. In order to approve or release a BPA Call, you must be a Contracting/Agreement Officer.
3. You must have an approved and released Requisition in GLAAS in order to create a BPA Call.

NOTES:

The process for creating a BPA Call is similar to the process used to create a Purchase Order. This user guide will only highlight the differences between creating a BPA Call and a Purchase Order. The *Creating a Purchase Order* user guide contains a full walkthrough on how to create a Purchase Order.

STEPS:

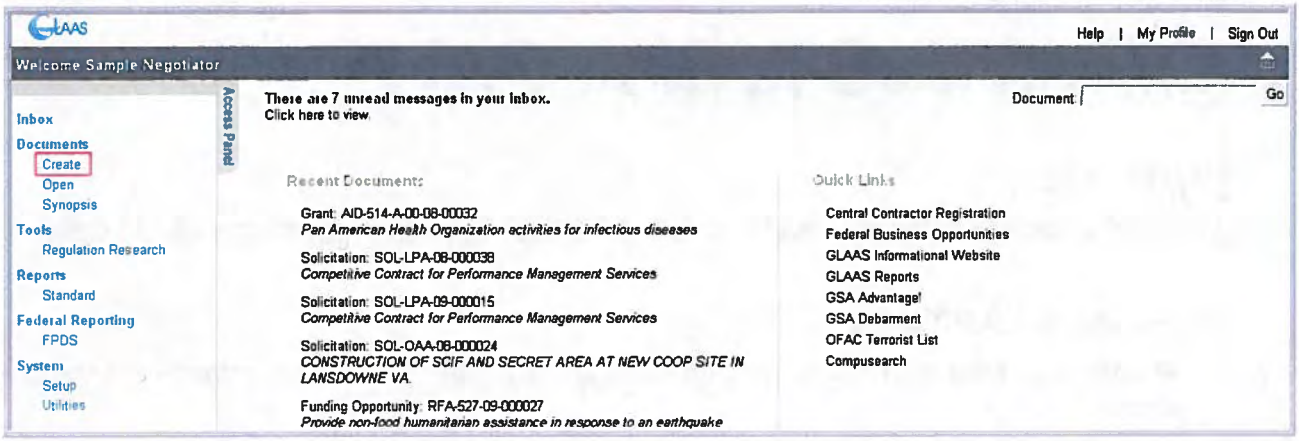


Figure 1: GLAAS Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

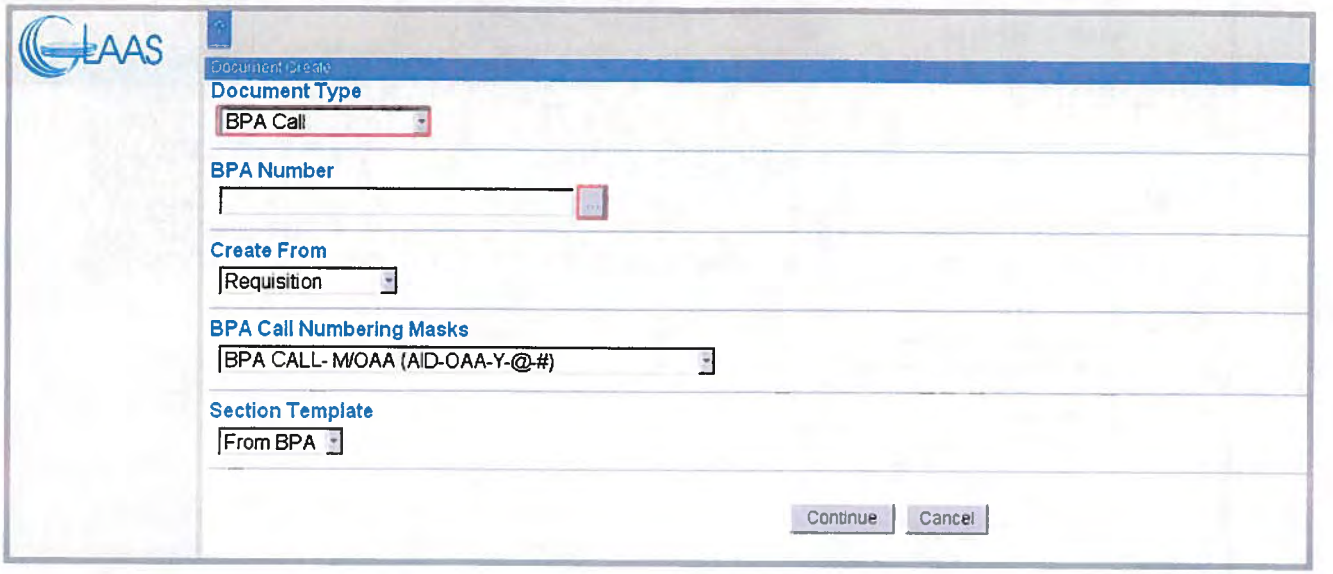


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select "BPA Call." • Click the lookup button (...) next to **BPA Number** to search for the BPA.	You must associate a BPA Call to a Blanket Purchase Agreement (BPA).

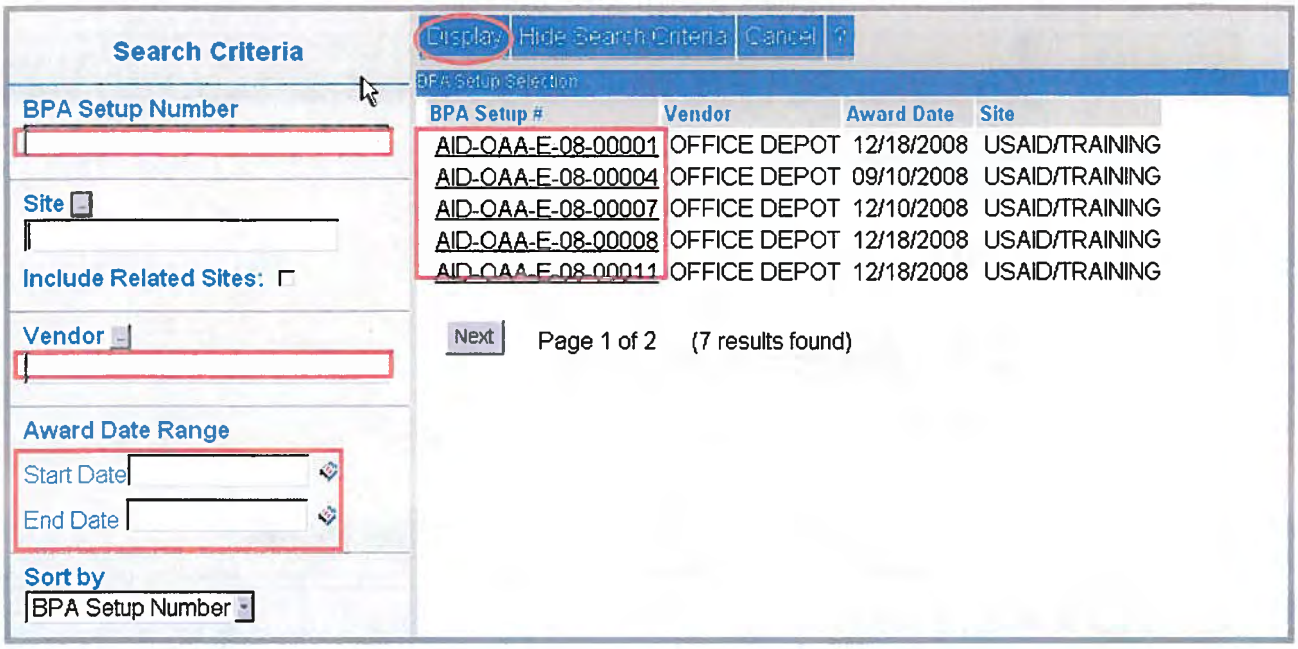


Figure 3: BPA Setup Selection Screen

Steps	Section	User Action	Guidance
4.	BPA Setup Selection	Clear the **Site** field and search for a BPA using one or more of the following fields: • **BPA Setup Number** • **Vendor** • **Award Date Range** Click the **Display** toolbar button.	When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Once you select a BPA, GLAAS will populate your BPA Call with information copied from the BPA Setup. GLAAS will pull all of the general information and attachments from the Requisition and BPA into the BPA Call.
5.	BPA Setup Selection	Click the **BPA Setup #** link.	

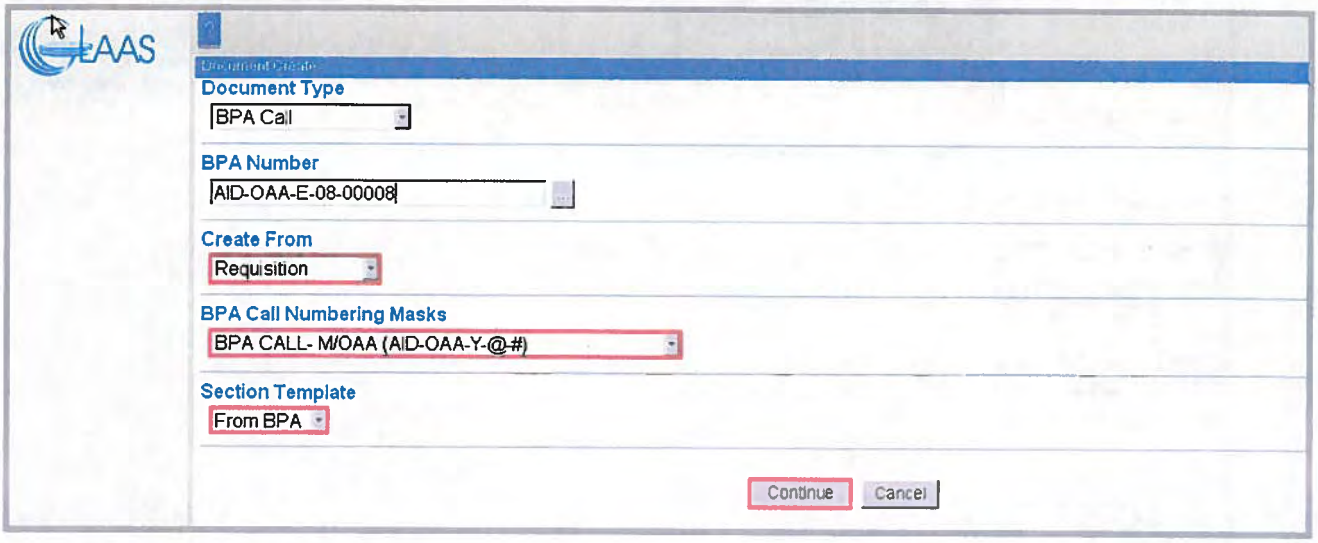


Figure 4: Document Create Screen

Steps	Section	User Action	Guidance
6.	Document Create	Complete the following fields: • **Create From**: Select "Requisition." • **BPA Call Numbering Masks**: Select a numbering mask that matches your site. • **Section Template:** Choose "From BPA." Click the **Continue** button.	When you choose "From BPA" in the **Section Template** field, GLAAS will pull the contract clauses from the BPA into the BPA Call. If you choose "Select New" in the **Section Template** field, GLAAS will prompt you to choose a Clause Template. If you choose "None" in the **Section Template** field, you can still pick a Clause Template from the **Package / Body** screen of your document.

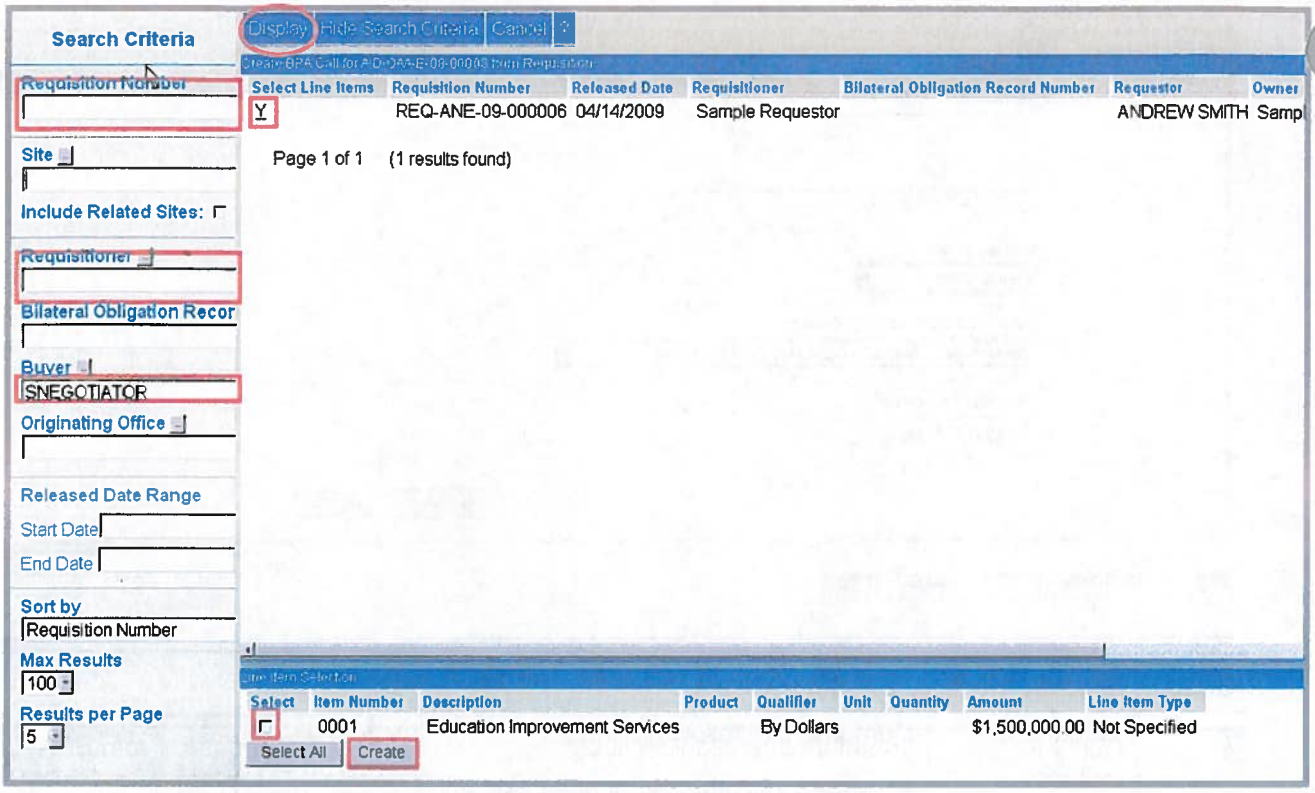


Figure 5: Create BPA Call from Requisition Screen

Steps	Section	User Action	Guidance
7.	Create BPA Call from Requisition	Clear the **Site** field and search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitioner** • **Buyer** Click the **Display** toolbar button.	Only Requisitions with a status of "Released" will appear in this search screen. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. The **Requisitioner** field refers to the Requestor.
8.	Create BPA Call from Requisition	Click the Y link in the **Select Line Items** column.	A list of Requisition line items will appear at the bottom of the screen.
9.	Create BPA Call from Requisition	Check the box in the **Select** column for each line item you want to pull into the BPA Call from the Requisition. Click the **Create** button.	

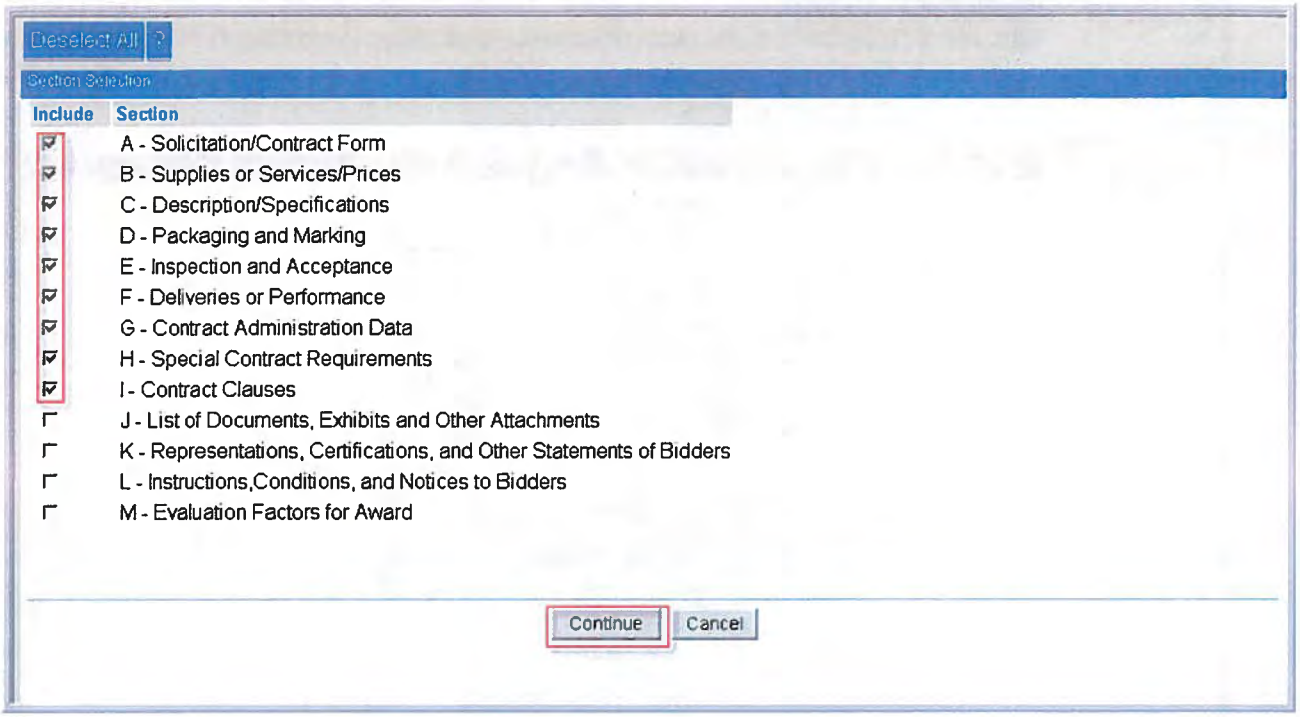


Figure 6: Section Selection Screen

Steps	Section	User Action	Guidance
10.	Section Selection	Check the appropriate box in the **Include** column for the Clause **Section(s)** you want to carry forward to the BPA Call.	The selected **Sections** to include in the BPA Call copies those clauses and the Fill-in values from the BPA.
11.	Section Selection	Click the **Continue** button.	

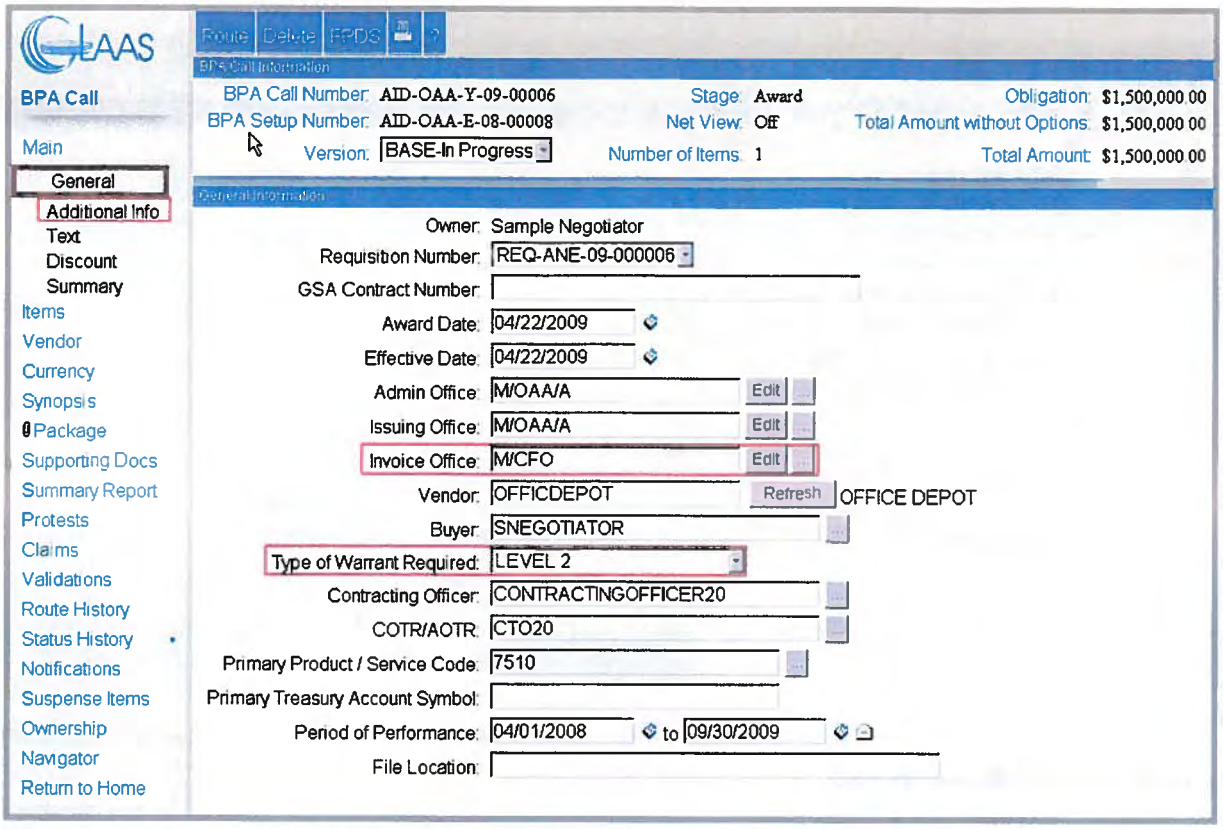


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
12.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Invoice Office**: Select the code for the Invoice Office. — R **Type of Warrant Required:** Select a warrant level. — R	GLAAS shows both the **BPA Call Number** and the overall **BPA Setup Number**. GLAAS will auto-populate various fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The warrant level validates against the total estimated cost, versus the amount being obligated on this action. Refer to the *Creating a Purchase Order* user guide to learn how to fill out the remaining fields on this screen.
13.	Main / General	Click the **Additional Info** link on the left-hand menu.	

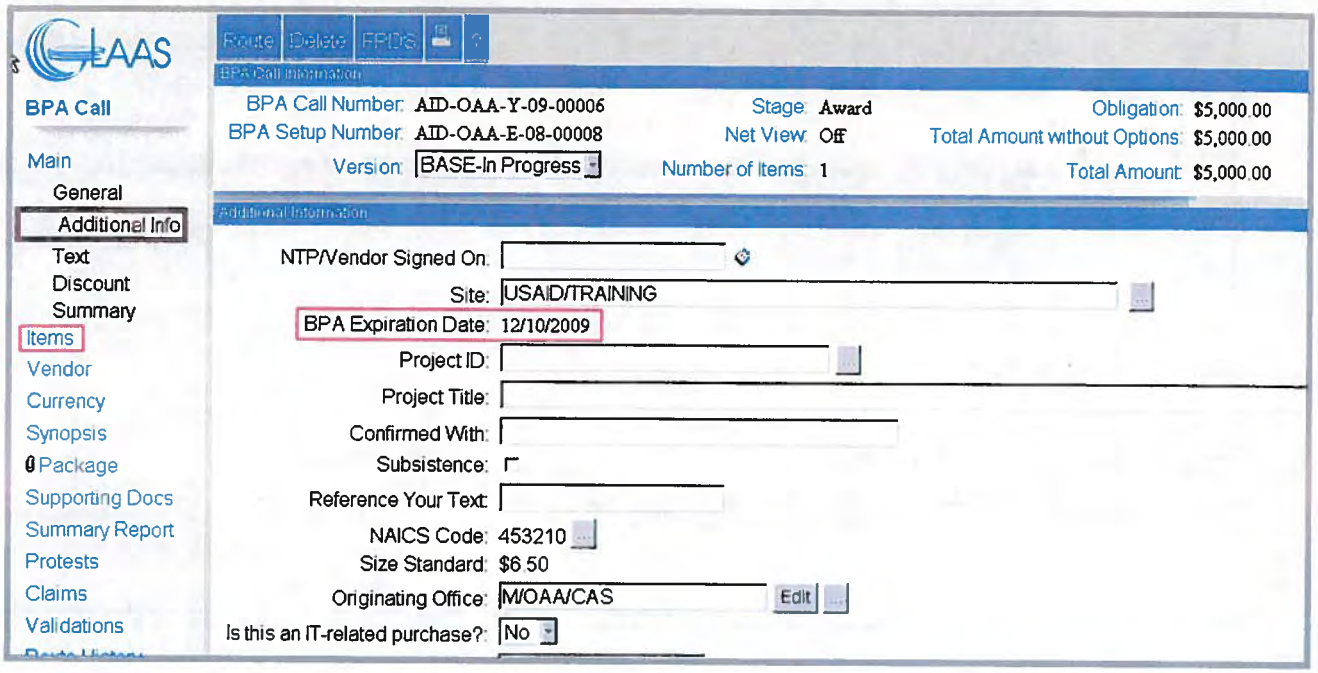


Figure 8: Main / Additional Info Screen

Steps	Section	User Action	Guidance
14.	Main / Additional Info	Fill out the fields on this screen like you would fill out the fields on a Purchase Order. Review the **BPA Expiration Date.**	The fields on the **Additional info** screen will be copied from the requisition and the BPA Setup. GLAAS will auto-populate various fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. Refer to the *Creating a Purchase Order* user guide to learn how to fill out the remaining fields on this screen.
15.	Main / Additional Info	Click the **Items** link on the left-hand menu.	

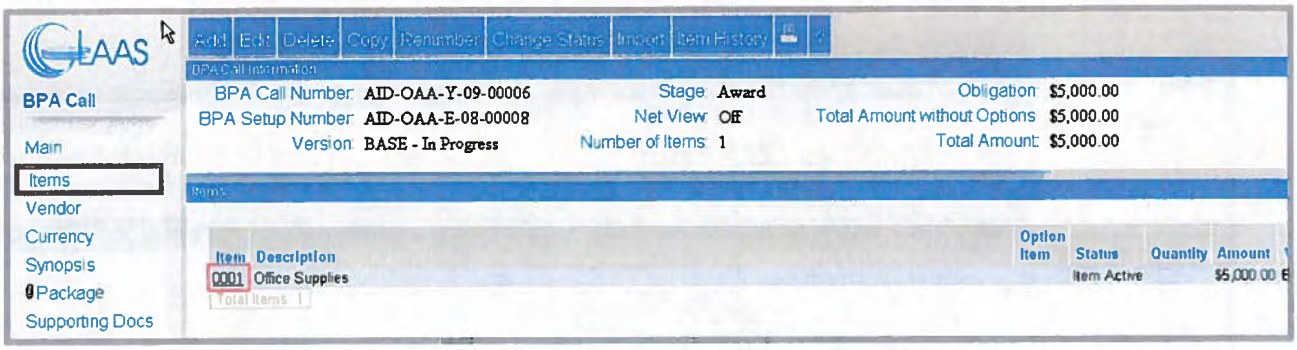


Figure 9: Items Screen

Steps	Section	User Action	Guidance
16.	Items	Click an **Item** number link.	The **Items** screen displays the line items pulled forward from the Requisition.

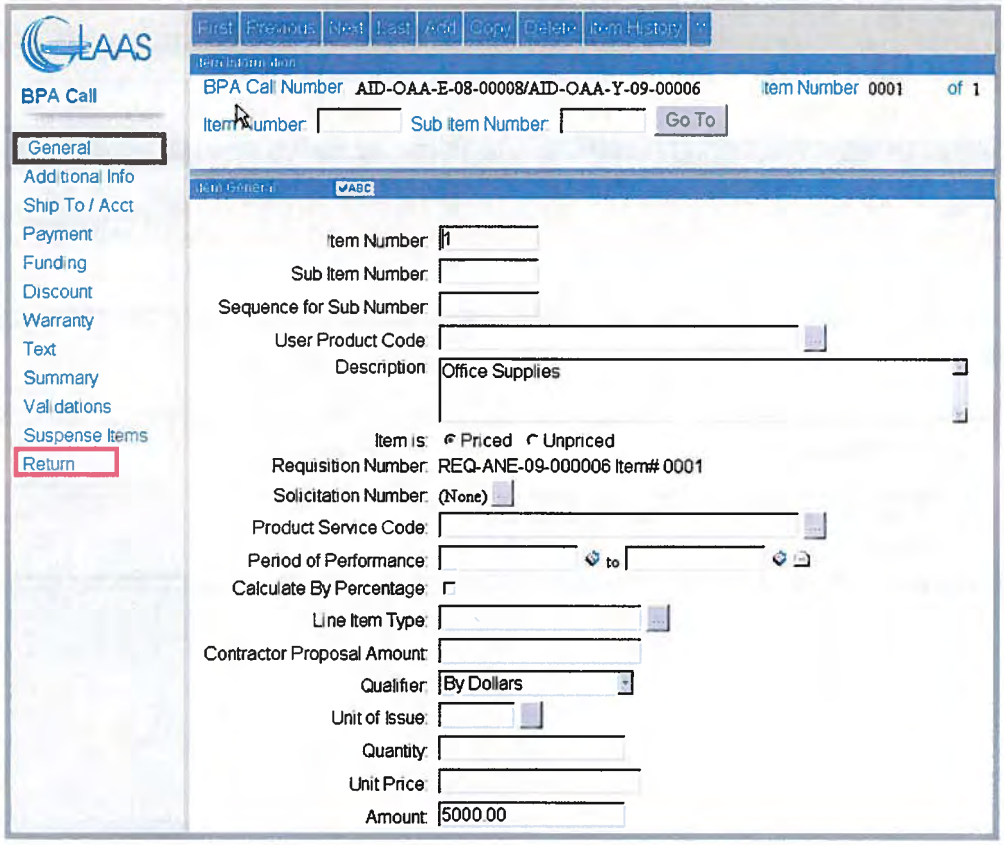


Figure 10: Item / General Screen

Steps	Section	User Action	Guidance
17.	Items	You can edit the line items fields, if necessary.	Fill out the **Items** screens the same as you would for a Purchase Order. Refer to the *Creating a Purchase Order* user guide to read about the **Items** screens in more detail.
18.	Items	Click the **Return** link on the left-hand menu.	

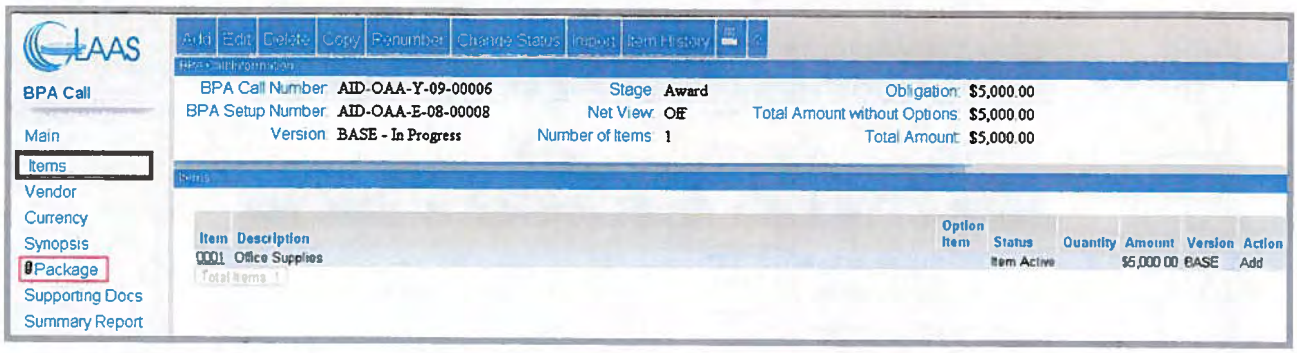


Figure 11: Items Screen

Steps	Section	User Action	Guidance
19.	Items	Click the **Package** link on the left-hand menu.	

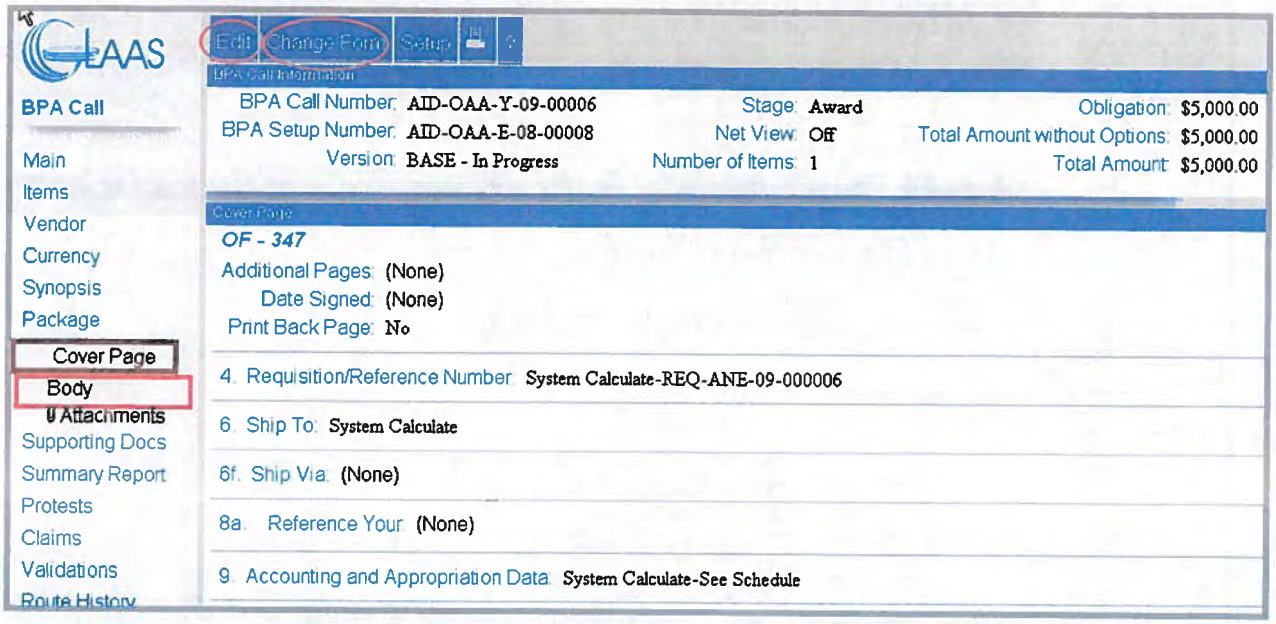


Figure 12: Package / Cover Page Screen

Steps	Section	User Action	Guidance
20.	Package / Cover Page	Click the **Edit** toolbar button to change the information on the Cover Page (not shown).	The Cover Page selected on the original BPA Setup document displays. Click the **Change Form** toolbar button to select a different cover page, if necessary (not shown). Refer to the *Filling Out a Form* user guide to complete a Cover Page in more detail.
21.	Package / Cover Page	Click the **Body** link on the left-hand menu.	

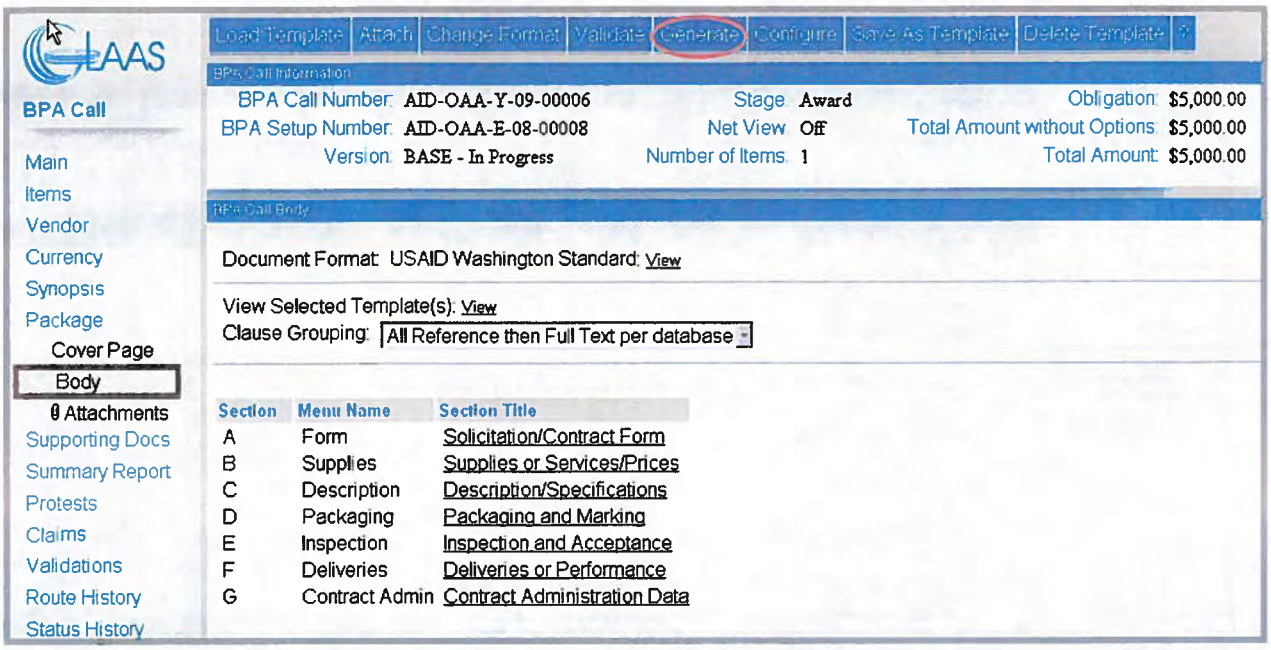


Figure 13: Package / Body Screen

Steps	Section	User Action	Guidance
22.	Package / Body	Review the clause information and grouping on this screen for accuracy.	GLAAS brings the contract sections, clauses and provisions from the BPA forward into the BPA Call. Use this screen to update, change or delete clauses for the BPA. The *Working with Clauses* user guide explains how to work with GLAAS Clause Templates in more detail.
23.	Package / Body	Refer to the *Creating a Purchase Order* user guide to finish creating your BPA Call.	

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GLAAS 102: Closing Out Awards

November 2009

Closing Out Awards Objectives

- At the end of this topic, you will know how to:
  - Load a closeout checklist
  - Close out an award in GLAAS

Closing Out an Award in GLAAS

- The GLAAS closeout process fully supports FAR closeout procedures
- Closeout checklists can be created based on site, document type, commodity or other factors
- The closeout function automatically validates that all delivery orders/task orders and modifications have been completed
- Closed out documents can be viewed and printed
- Documents associated with the award are automatically closed when the award is closed

Closing Out Awards Overview

- Must be a Contracting Officer/Agreement Officer
- Tracks the closeout process as tasks are completed
- Does not replace any existing USAID Closeout procedures
- The following criteria must be completed before closing out a document in GLAAS:
  - The final payment must have been made
  - All modifications and delivery orders must be closed
  - The periods of performance must be completed

GLAAS 102 USER GUIDE:

CLOSING OUT AN AWARD IN GLAAS

PURPOSE:

This user guide will show you how to closeout an Award in GLAAS. The GLAAS Closeout process does not replace any existing USAID Closeout procedures. For example, all final payments must be verified with the financial office. The following criteria must be completed before closing out a document in GLAAS: the final payment must have been made; all modifications and delivery orders must be closed; and any periods of performance, warranties, or suspense items cannot be open.

BEFORE STARTING:

1. In order to close out an Award, you must be an A&A Specialist or a Contracting/Agreement Officer.
2. You must have an Award ready for closeout in GLAAS.

STEPS:

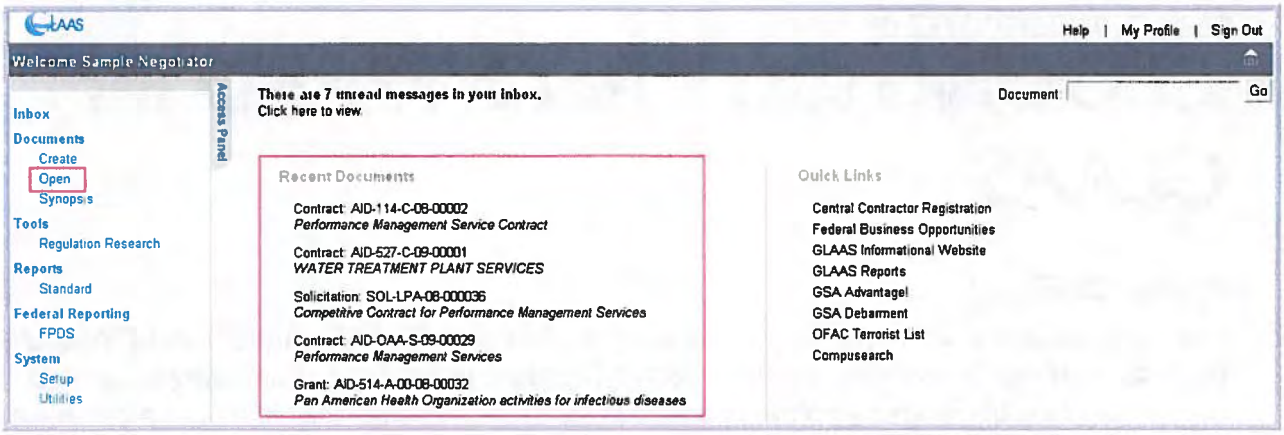

Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Open** link on the **Access Panel**, and then go to **Step 3**. OR Click a **Document** link under **Recent Documents**, and then go to **Step 5**.	

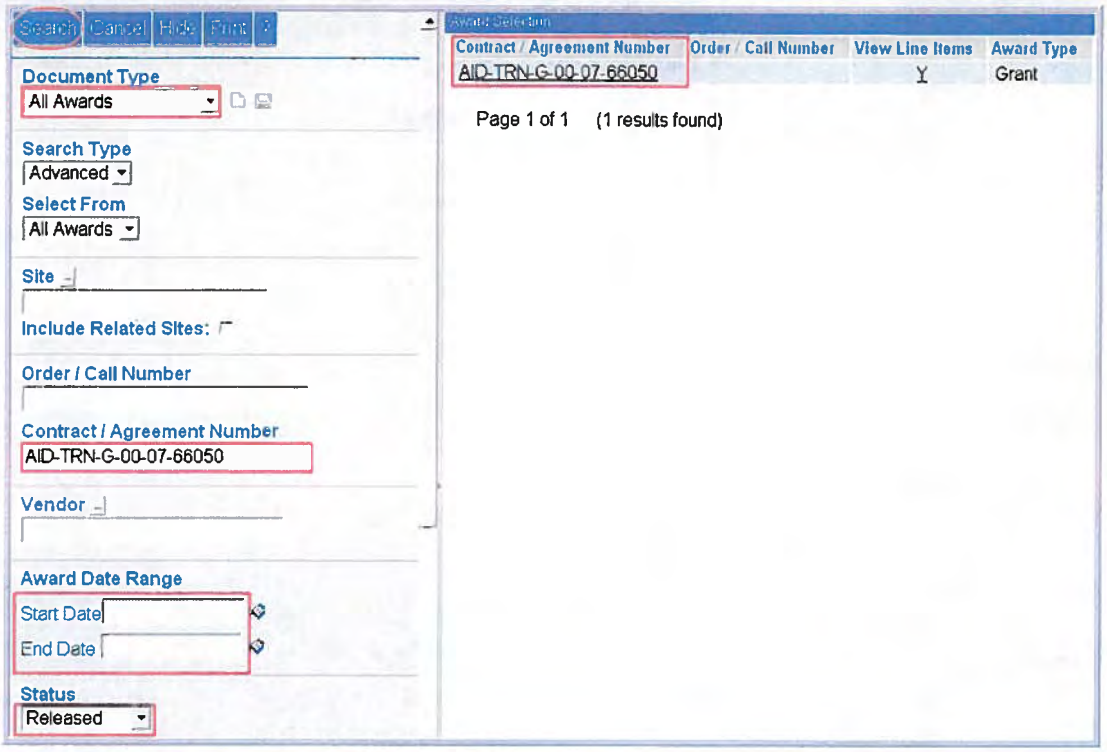

Figure 2: Award Selection Screen

Steps	Section	User Action	Guidance
3.	Award Selection	Use the selection window on the left of the screen to search for the Released Award document. Search for the Award you plan to Close Out. You can search by various fields such as: • **Document Type** • **Contract/Agreement Number** • **Award Date Range** • **Status** Click the **Search** toolbar button to display a list of Documents that meet your search criteria. If the Award number is known, enter it in the **Contract/Agreement Number** field, then click the **Search toolbar** button. The results will display, click the **Contract/Agreement Number** of the document you are searching for.	**Select From** will default to "My Documents." Change this to "All Documents" when searching for documents created by others. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user. Use the same process for closing out both Acquisition and Assistance Awards.

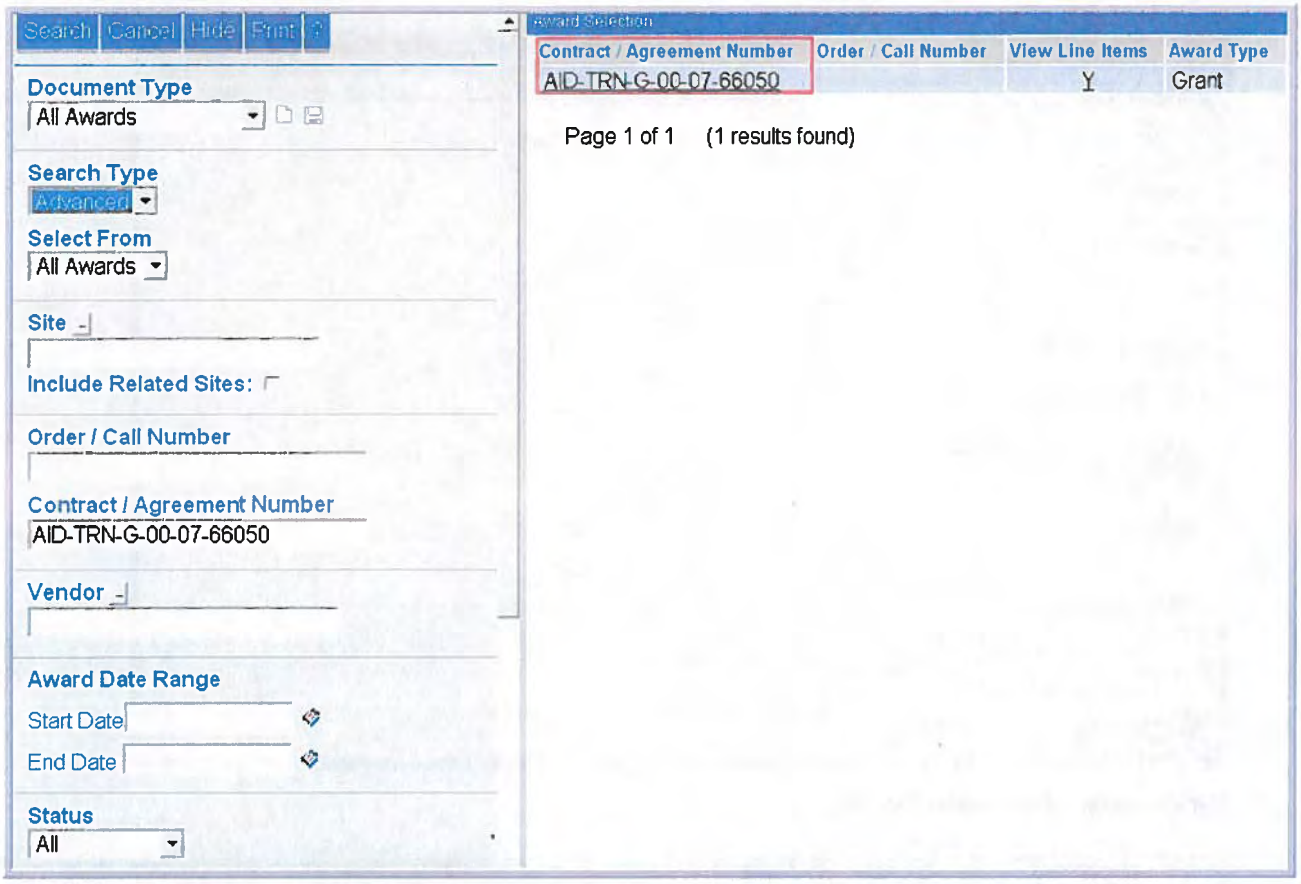

Figure 3: Award Selection Screen

Steps	Section	User Action	Guidance
4.	Award Selection	Click a **Contract/Agreement Number** link to select an Award to close out.	

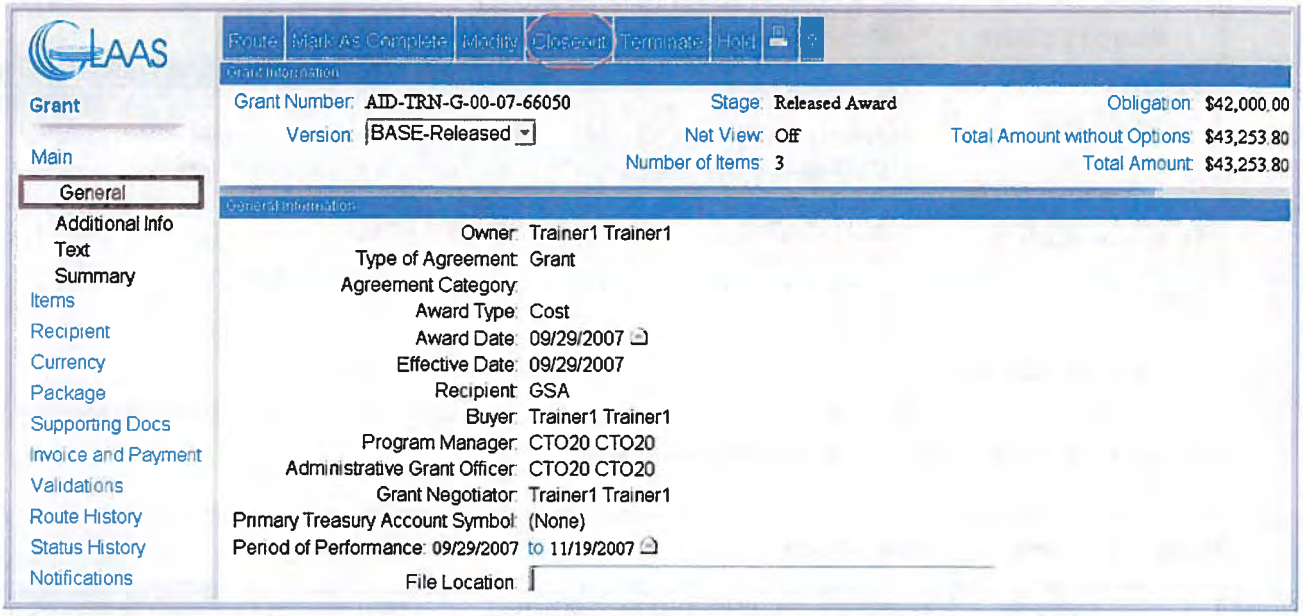

Figure 4: Main / General Screen

Steps	Section	User Action	Guidance
5.	Main / General	Click the **Closeout** toolbar button to begin closing out this award.	If there are remaining funds not yet obligated on the award, the funds must be de-obligated prior to closing the award. GLAAS will generate an error if there are funds remaining in the Award.

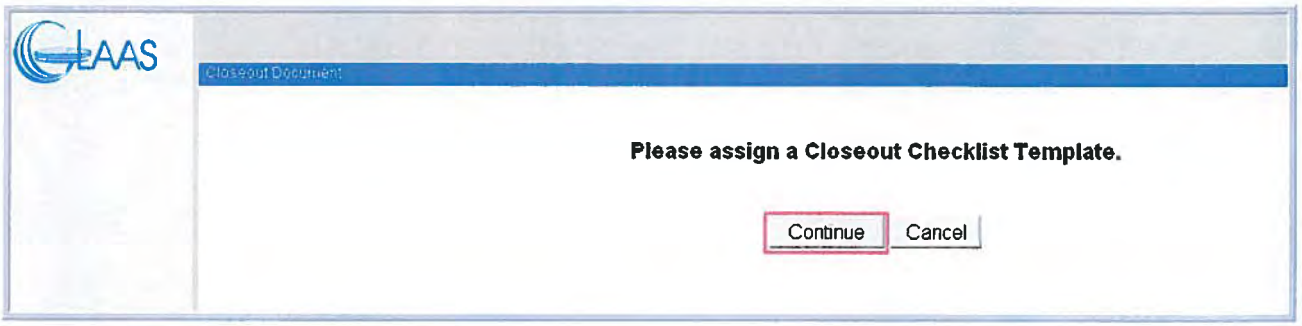

Figure 5: Closeout Document Screen

Steps	Section	User Action	Guidance
6.	Closeout Document	Click the **Continue** button.	GLAAS prompts you to assign a Closeout Checklist Template to this Award.

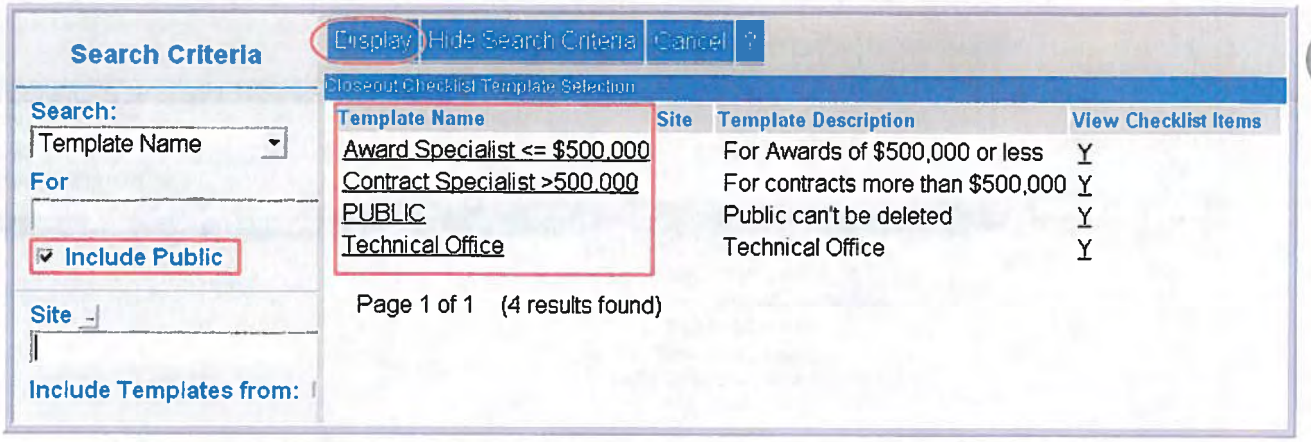

Figure 6: Closeout Checklist Template Selection Screen

Steps	Section	User Action	Guidance
7.	Closeout Checklist Template Selection	Select the **Include Public** checkbox. Click the **Display** toolbar button to search for the list of templates. Click the **Template Name** link to choose a Closeout Checklist Template.	Your Site Administrator can create new Closeout Checklist Templates and update existing ones.

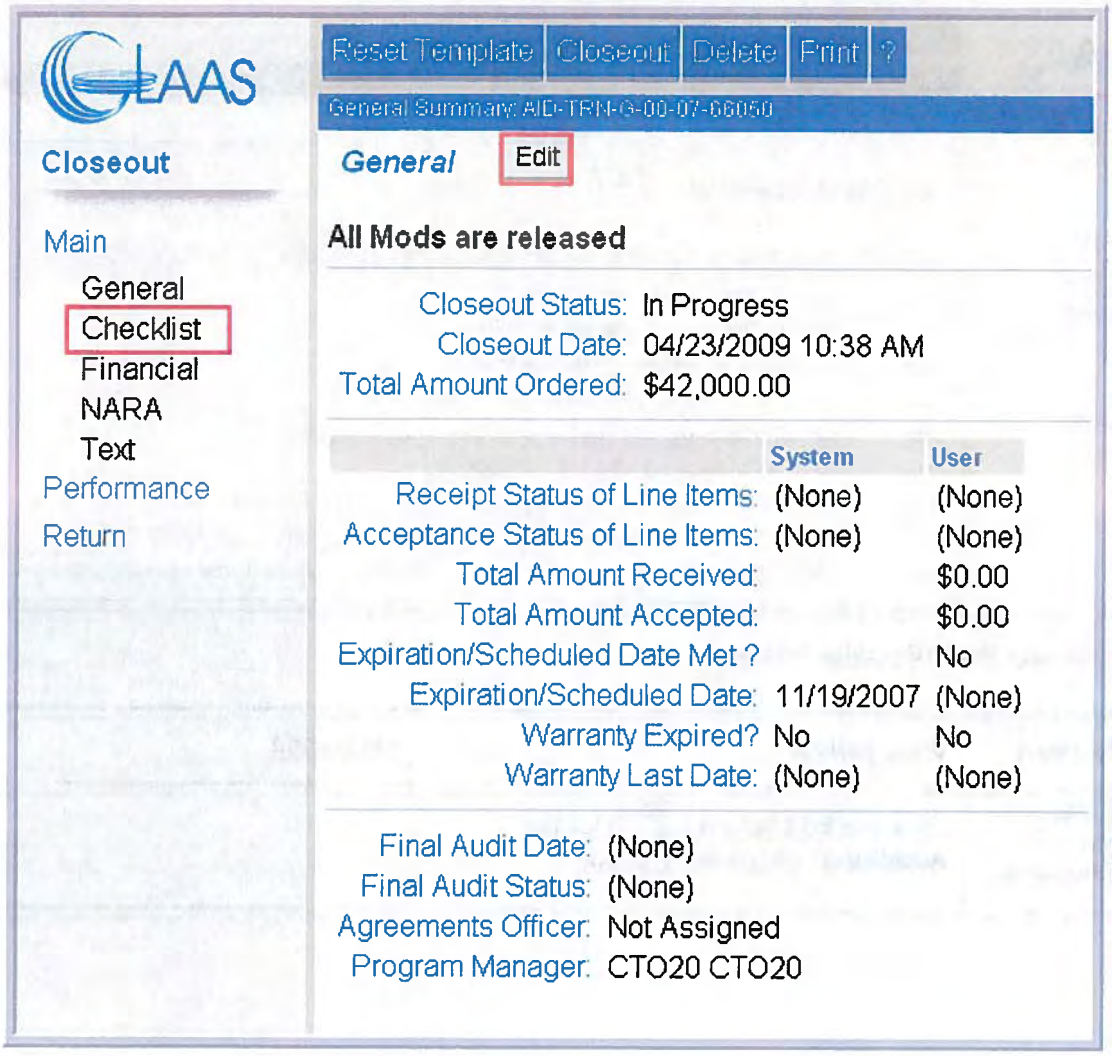

Figure 7: Closeout / Main / General Screen

Steps	Section	User Action	Guidance
8.	Closeout / Main / General	Click the **Edit** button (Edit) to modify the section's closeout measures. OR Click on the **Checklist** link on the left-hand menu.	You can navigate among the different sections by using the links on the left-hand menu.

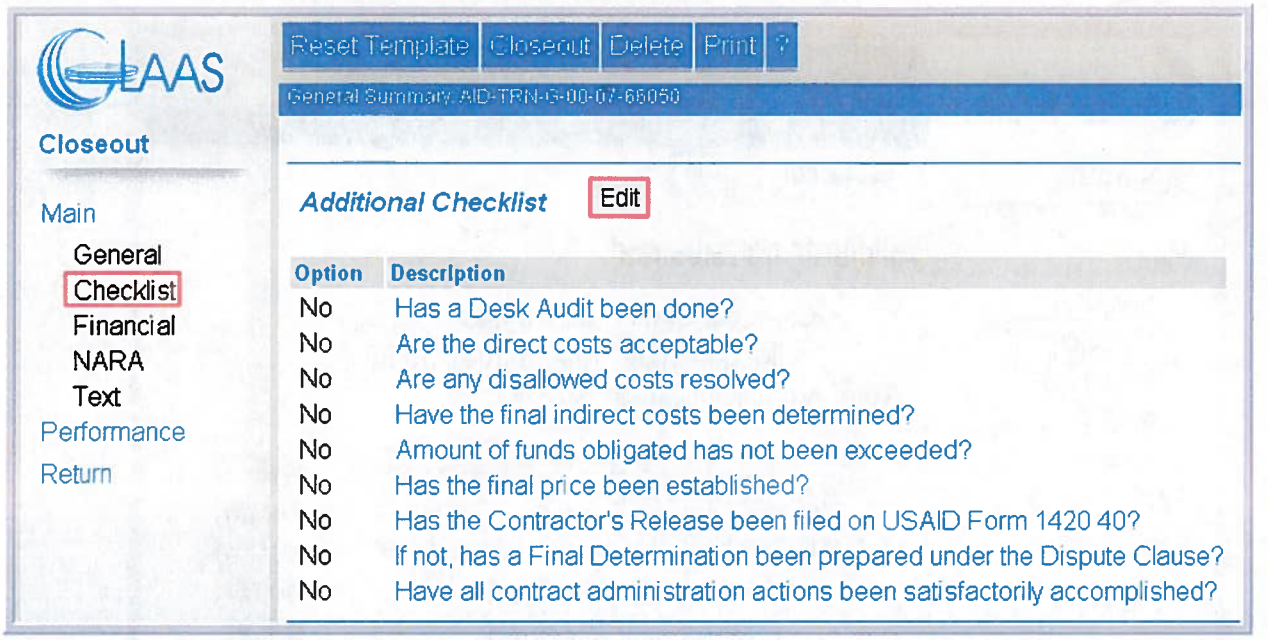

Figure 8: Closeout / Main / Checklist Screen

Steps	Section	User Action	Guidance
9.	Closeout / Main / Checklist	Click the **Edit** button (Edit) for the **Additional Checklist** section.	

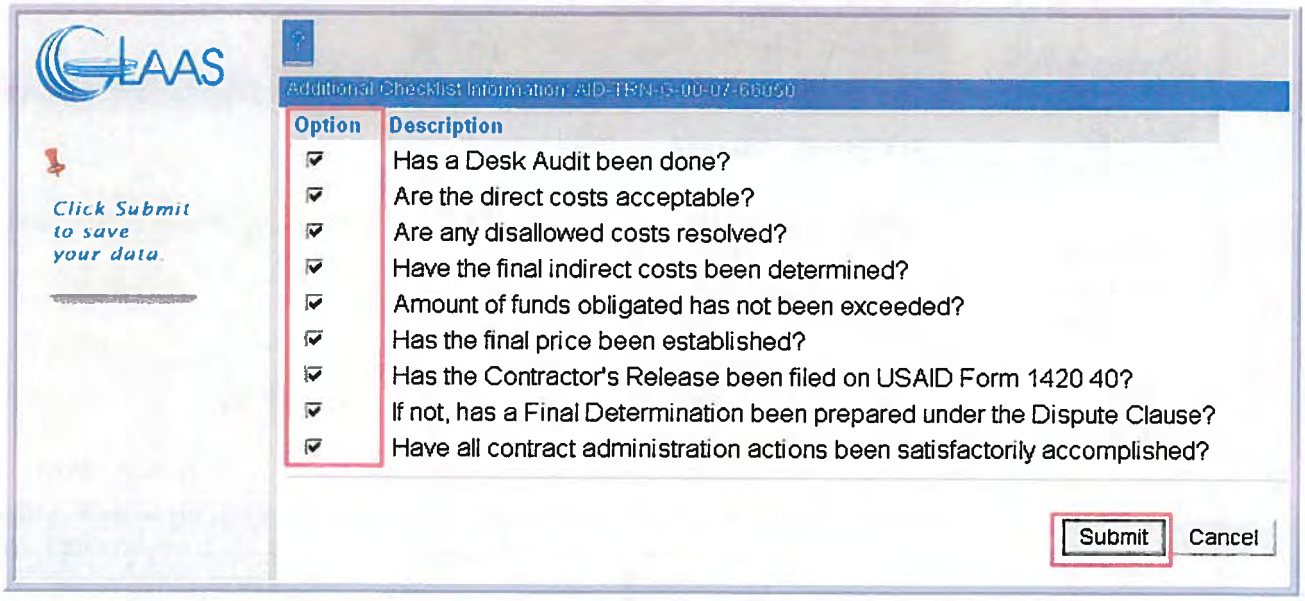

Figure 9: Additional Checklist Information Screen

Steps	Section	User Action	Guidance
10.	Additional Checklist Information	Check the boxes in the **Option** column to answer to each question. Click the **Submit** button.	

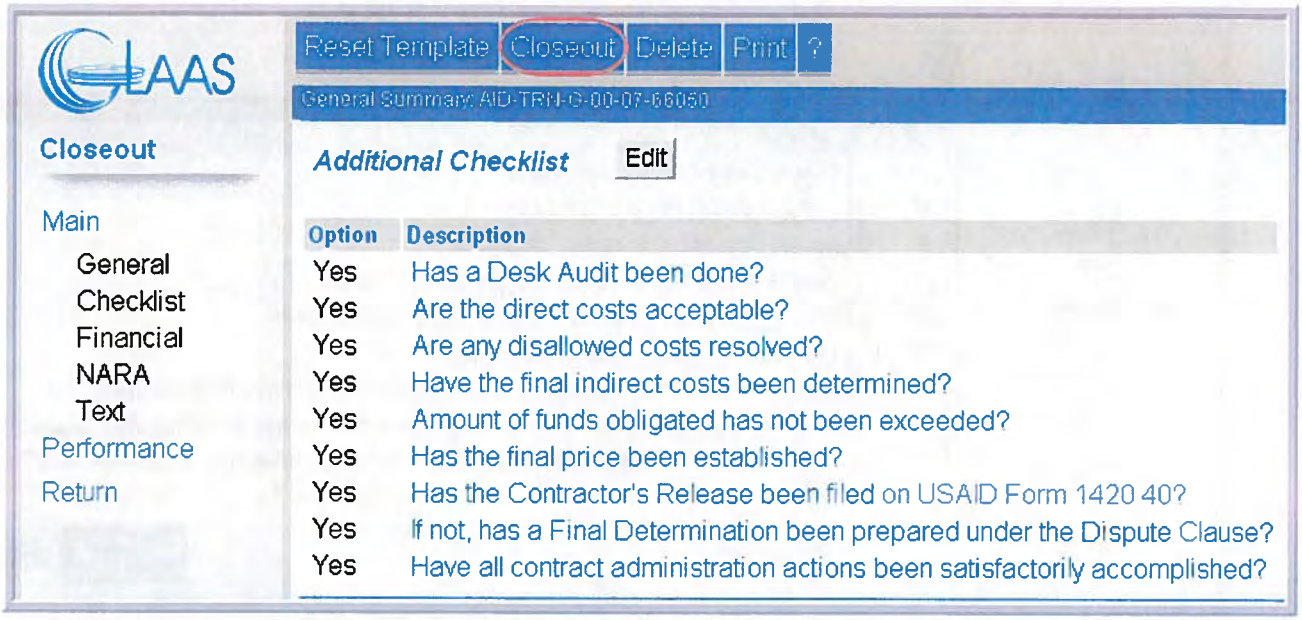

Figure 10: Closeout / Main / General Screen

Steps	Section	User Action	Guidance
11.	Closeout / Main / General	Click the **Closeout** toolbar button to close out this Award in GLAAS.	The entire closeout process may involve going into GLAAS several times to update the closeout checklists. You can continue to update the closeout items or you can leave the document, wait for more activities to wrap up, and then come back into GLAAS and update the closeout checklists again. GLAAS will not stop you from closing out an award if checklist items are unchecked. The Closeout Checklist Items are meant to be guidelines to help users through the closeout process. They do not generate errors that stop users from working in GLAAS.

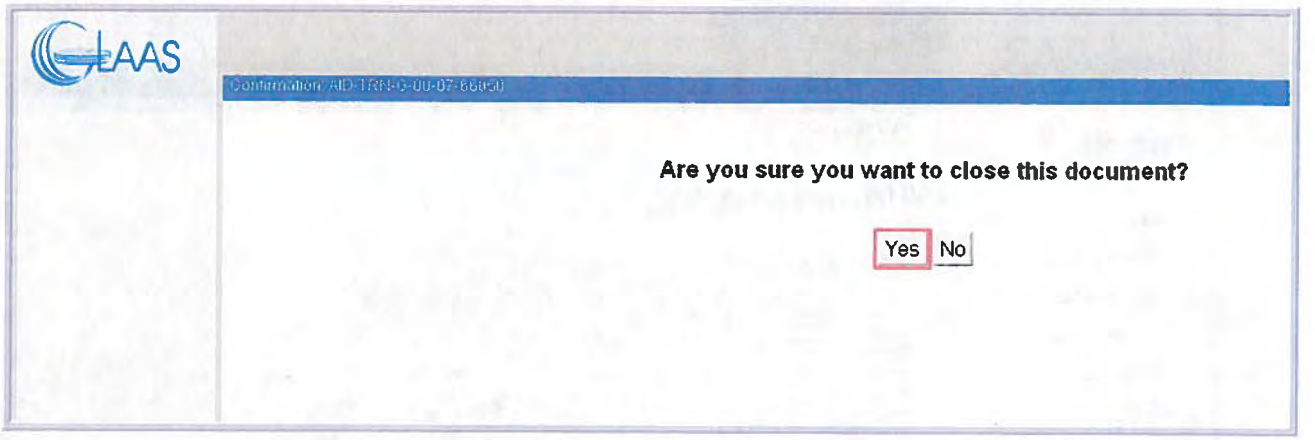

Figure 11: Confirmation Screen

Steps	Section	User Action	Guidance
12.	Confirmation	Click the **Yes** button.	Once you click the **Yes** button, any GLAAS documents linked to this Award that can be closed will also be closed and no additional work will be able to be performed on the Award. Award close outs in GLAAS do not integrate with the Phoenix financial system.

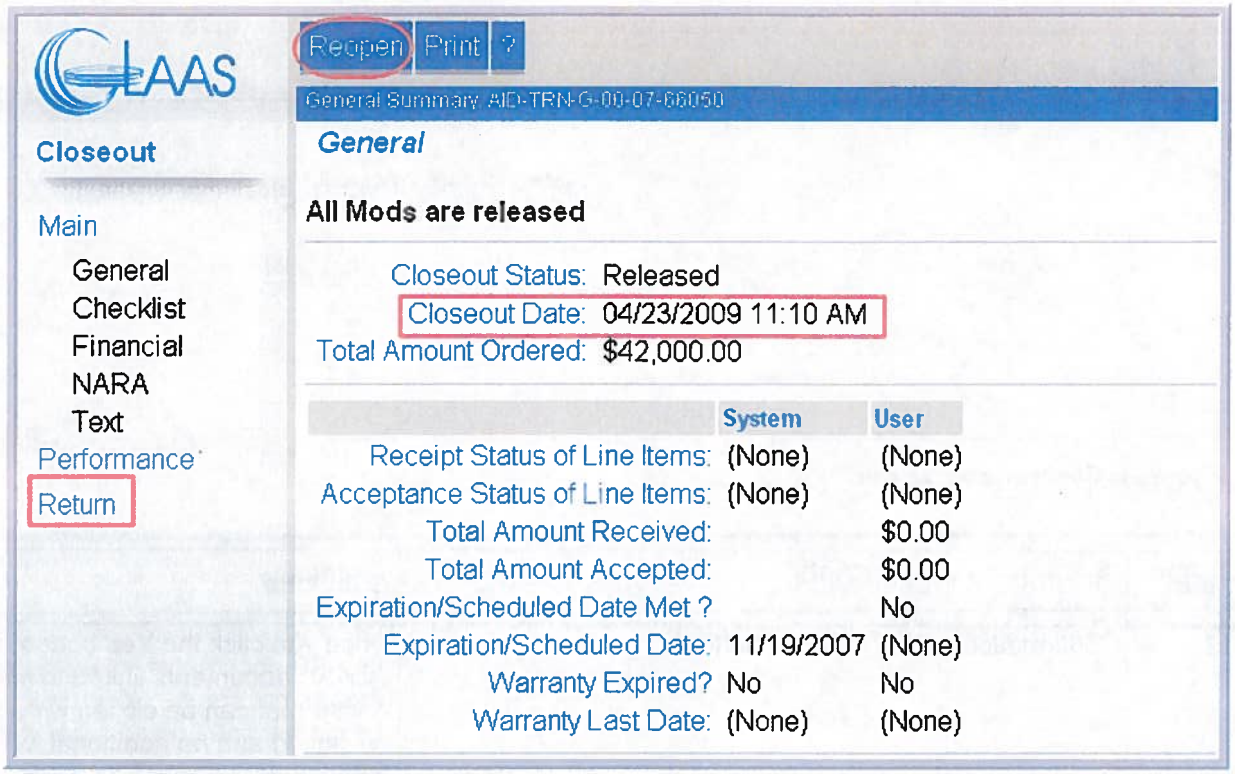

Figure 12: Closeout / Main / General Screen

Steps	Section	User Action	Guidance
13.	Closeout / Main / General	Verify the **Closeout Date**.	If you close out an award by mistake, you can click the **Reopen** button to re-open it. This will also re-open any documents (except Requisitions) attached to the Award.
14.	Closeout / Main / General	Click the **Return** link on the left-hand menu to return to the **Main / General** screen for this Award.	
15.	Main / General	Click the **Return** link on the left hand-menu to return to the **Welcome** screen (not shown).	

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GLAAS 102: Associating a Requisition Group to an Award

November 2009

Associating a Requisition Group to an Award Objectives

- At the end of this topic, you will know how to:
  - Create an award and award modification from a requisition group
  - Add funding to an award line item from a requisition group

Creating a Requisition Group

- The requisition group is created from either a requisition or requisition for modification
- This requisition is known as the lead requisition
  - A requisition is used for new awards
  - A requisition for modification is used for award modifications only
- Additional requisitions can be added to the group
- Once the group is finalized, the status is changed to "Closed"

Requisition Group on an Award

- The Buyer associated to the lead requisition is notified when the group status is "Closed"
- The new award is created from the lead requisition
- The Buyer selects the requisition group and associates the appropriate funding information

Requisition Group on an Award Modification

- The Buyer associated to the lead requisition for modification is notified when the group status is "Closed"
- The award modification is created from the lead requisition for modification
- The Buyer selects the requisition group and associates the appropriate funding information

Funding Information from a Requisition Group

- Accounting lines can be added to an award from multiple requisitions within a group
- Accounting line(s) can be added to an award in two places:
  - Ship To/Accounting
  - Funding

GLAAS 102 USER GUIDE:

ASSOCIATING A REQUISITION GROUP TO AN AWARD

PURPOSE:

This user guide will show you how to associate a requisition group to an award. Please refer to the *Creating a Contract from a Requisition* user guide for complete guidance on creating awards in GLAAS.

BEFORE YOU START:

1. You must be an A&A specialist or a Contracting/Agreement Officer.
2. A Requisition Group must be Closed.
3. A Milestone Plan for the modification has been created, linked to the requisition, and baselined.

NOTE:

The screenshots in this user guide apply to contracts, but the process for modifying assistance awards is the same.

STEPS:

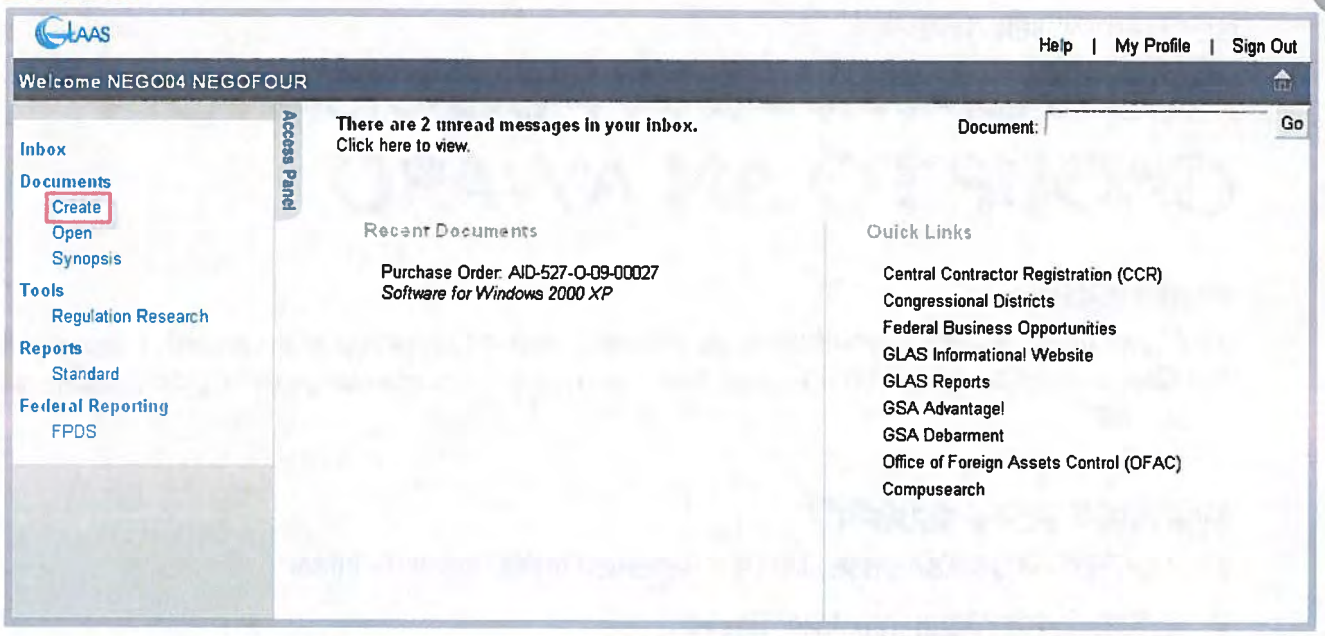


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log onto GLAAS (not shown).	
2.	Welcome	Click the **Create** link on the **Access Panel**.	

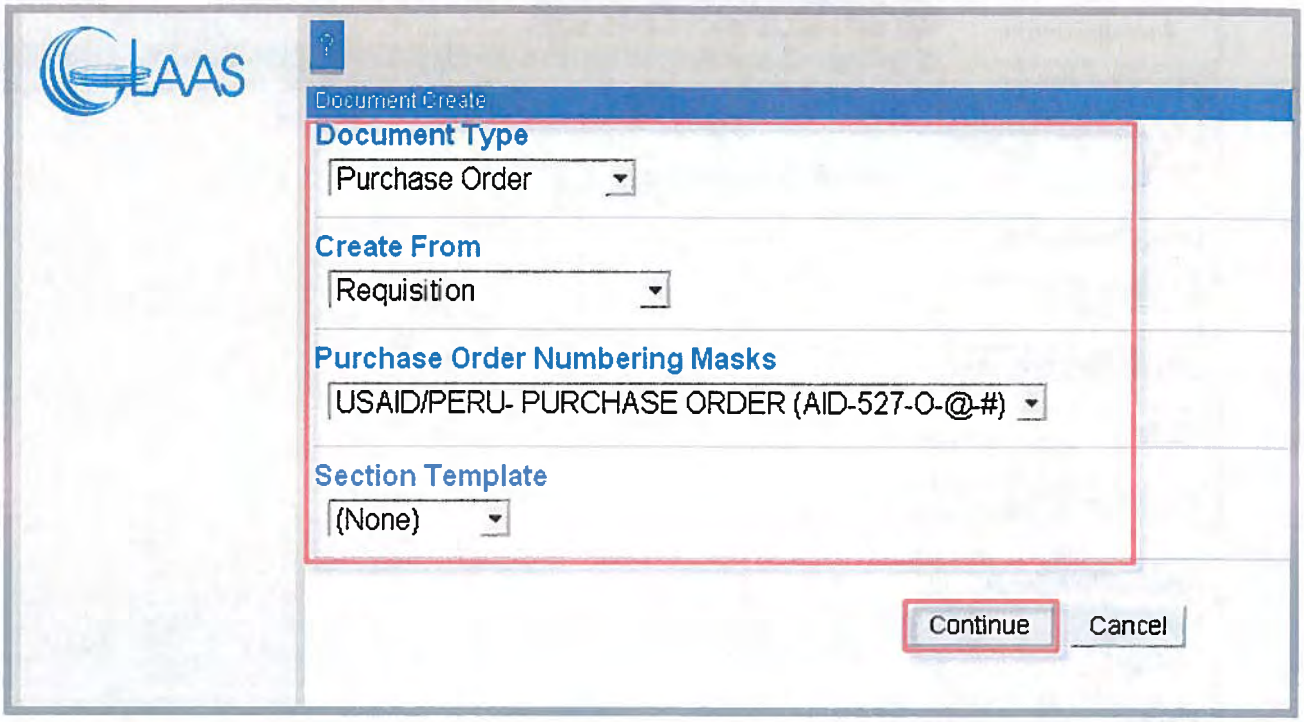


Figure 2: Document Create Screen

Steps	Section	User Action	Guidance
3.	Document Create	Complete the following fields: • **Document Type:** Select the appropriate document type. • **Create From:** Select "Requisition." • **Purchase Order Numbering Masks:** Select the number mask. • **Section Template:** Choose "Select New" to load a clause template now or "None" to add a template later.	Requisition groups can be used for all award types.
4.	Document Create	Click the **Continue** button.	

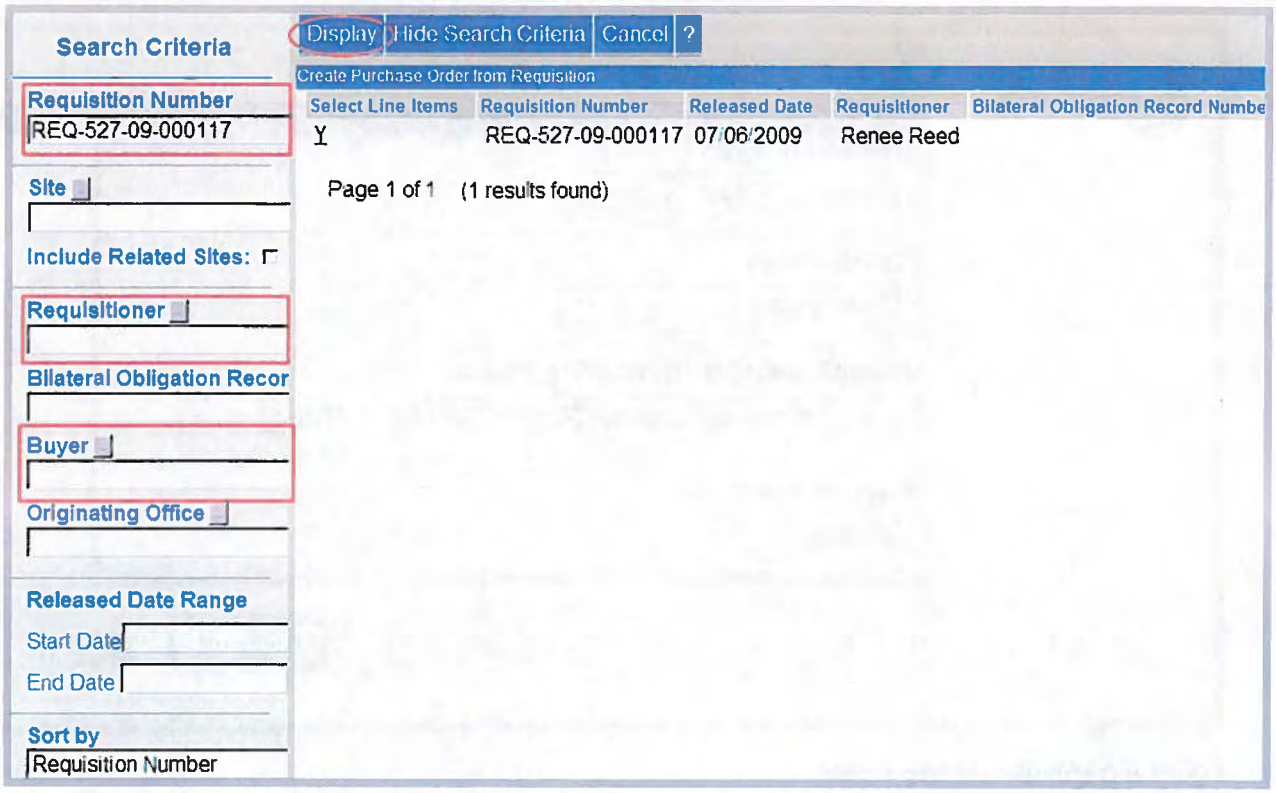


Figure 3: Search Criteria Screen

Steps	Section	User Action	Guidance
5.	Search Criteria	Clear the **Site** field and search for a Requisition using one or more of the following fields: • **Requisition Number** • **Requisitoner** • **Buyer**	Only Requisitions with a status of "Released' will appear in this search screen. Search for the Lead Requisition of the Req group. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name.
6.	Search Criteria	Click the **Display** toolbar button.	

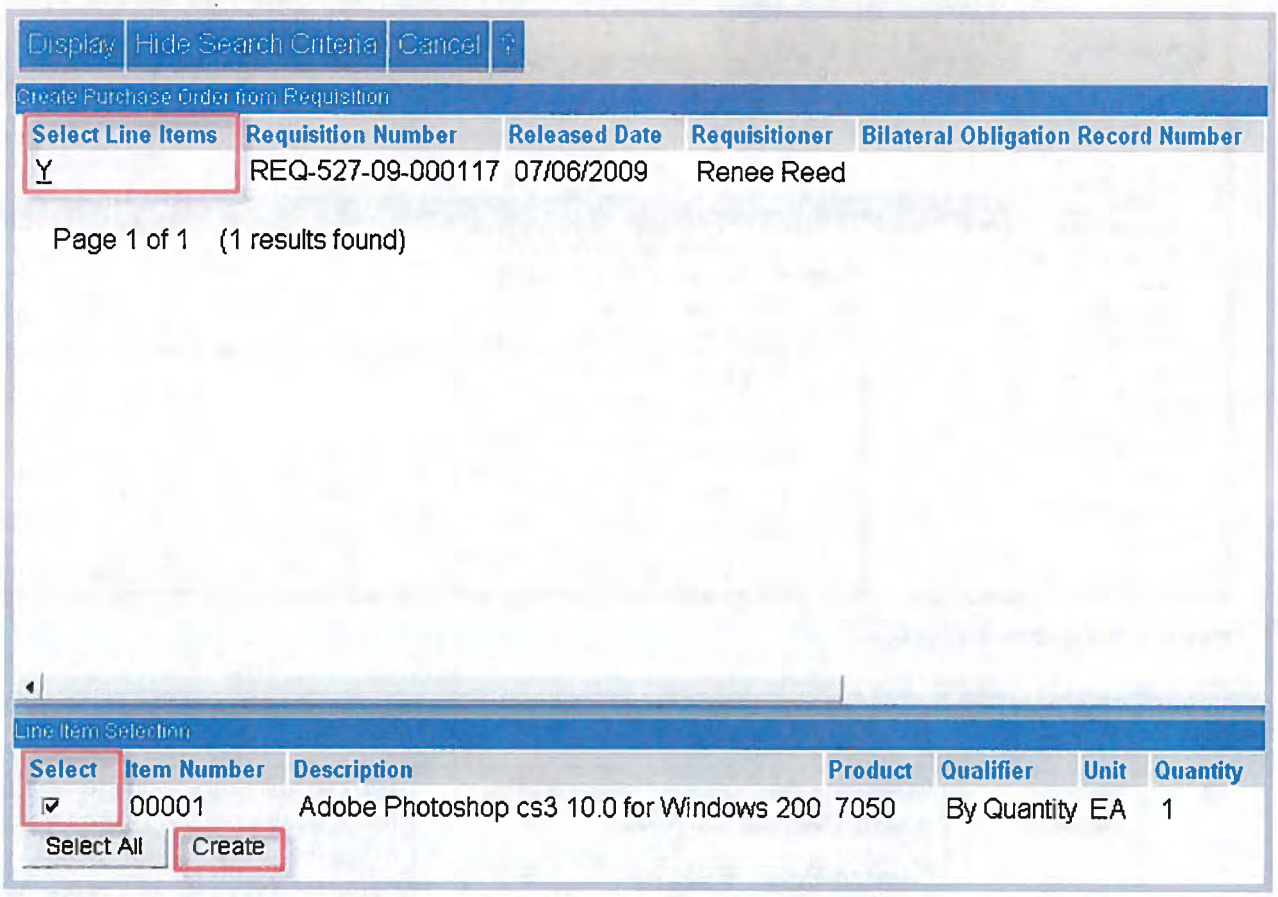


Figure 4: Create Purchase Order from Requisition Screen

Steps	Section	User Action	Guidance
7.	Create Purchase Order from Requisition	Click the **Y** link in the **Select Line Items** column to select a Requisition.	A list of Requisition line items will appear at the bottom of the screen.
8.	Create Purchase Order from Requisition	Click the box in the **Select** column for each line item you want to pull onto the Award from the Requisition	
9.	Create Purchase Order from Requisition	Click the **Create** button.	

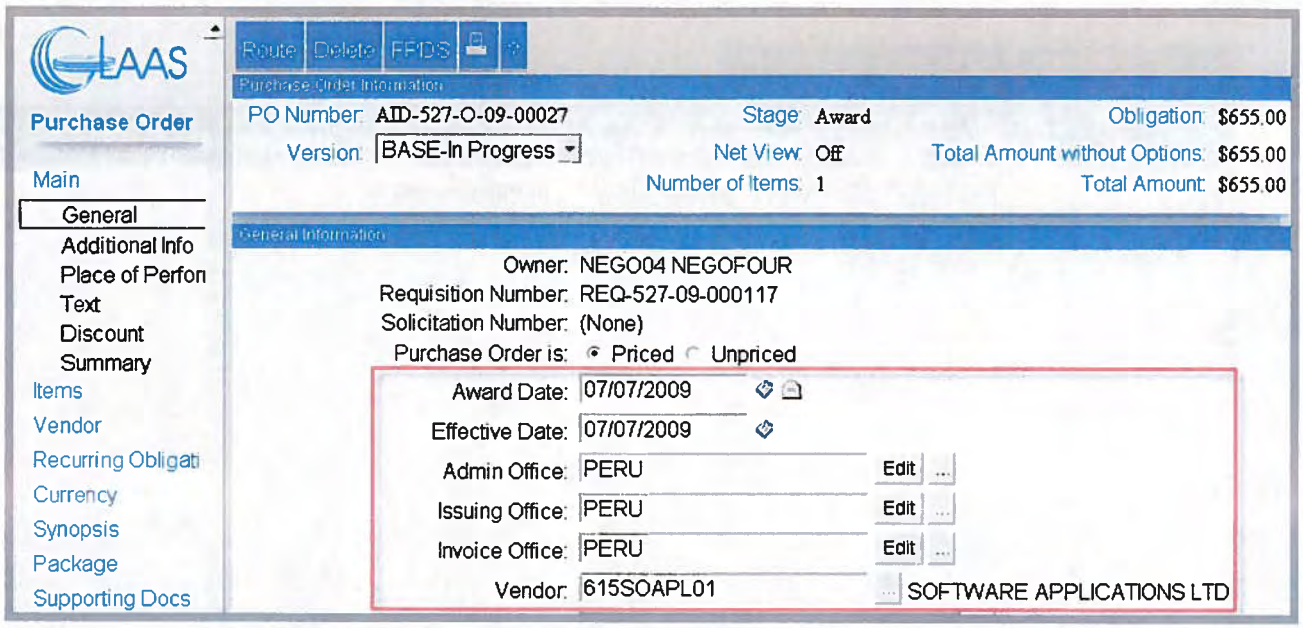


Figure 5: Main / General Screen

Steps	Section	User Action	Guidance
10.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Award Date:** Enter the date the award is signed. — R **Effective Date:** Enter the date the award (or current modification) will become effective. — R **Admin Office:** Select the code for the COTR's office. — R **Issuing Office:** Select the code for the contracting office. — R **Invoice Office:** Select the code for the office that receives the vendor invoices. — R **Vendor:** Select the Vendor code for this award. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. The **Award Type** selected here is reported to FPDS-NG.

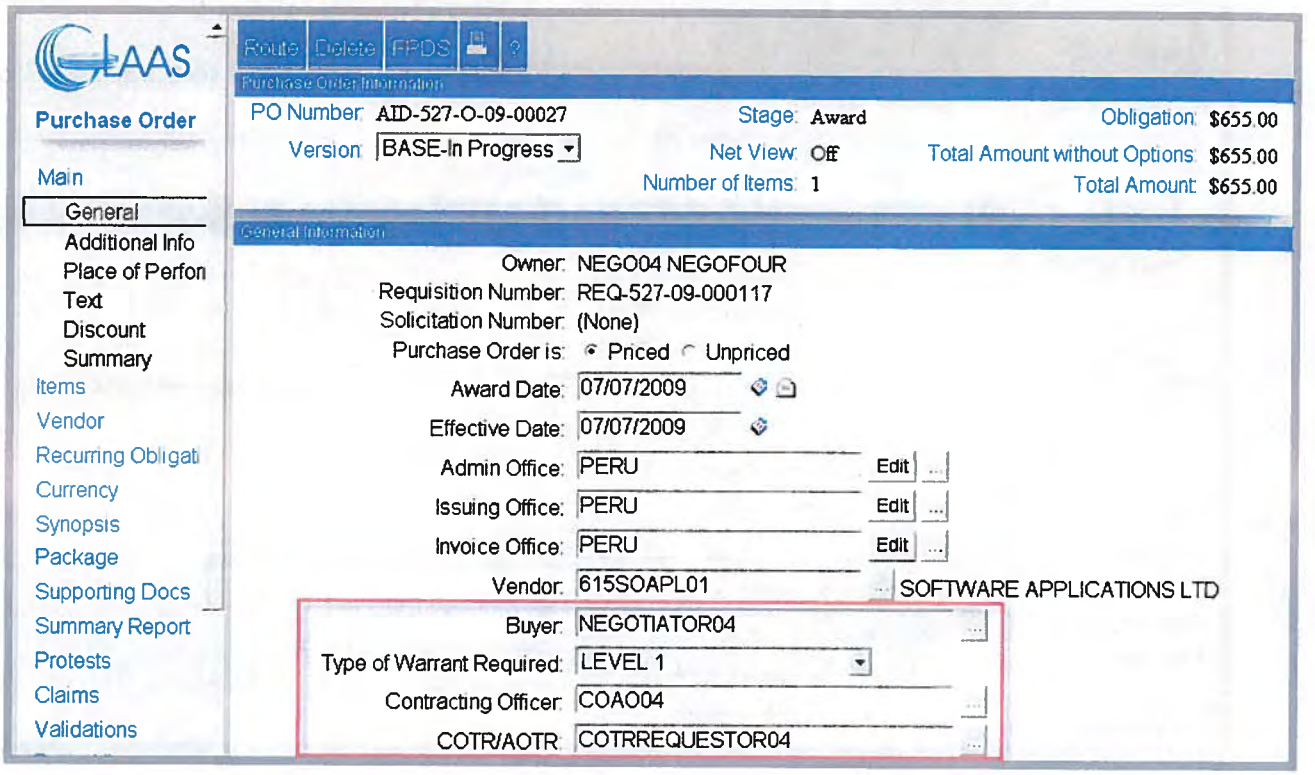


Figure 6: Main / General Screen

Steps	Section	User Action	Guidance
11.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Buyer:** Select the A&A Specialist for this award. — R **Type of Warrant Required:** Select a warrant level that corresponds to the award. — R **Contracting Officer:** Select the Contracting Officer for this award. — R **COTR/AOTR:** Select the COTR for this award. — R	GLAAS will auto-populate several fields based on information entered in the Requisition and system defaults. You may edit these fields as needed or required. Click the **Edit** button (Edit) to modify how office addresses will appear on forms. For base awards, the warrant is validated against the obligation amount. For modifications, it is validated against the total amount for that action, to allow for unlimited incremental funding authority.

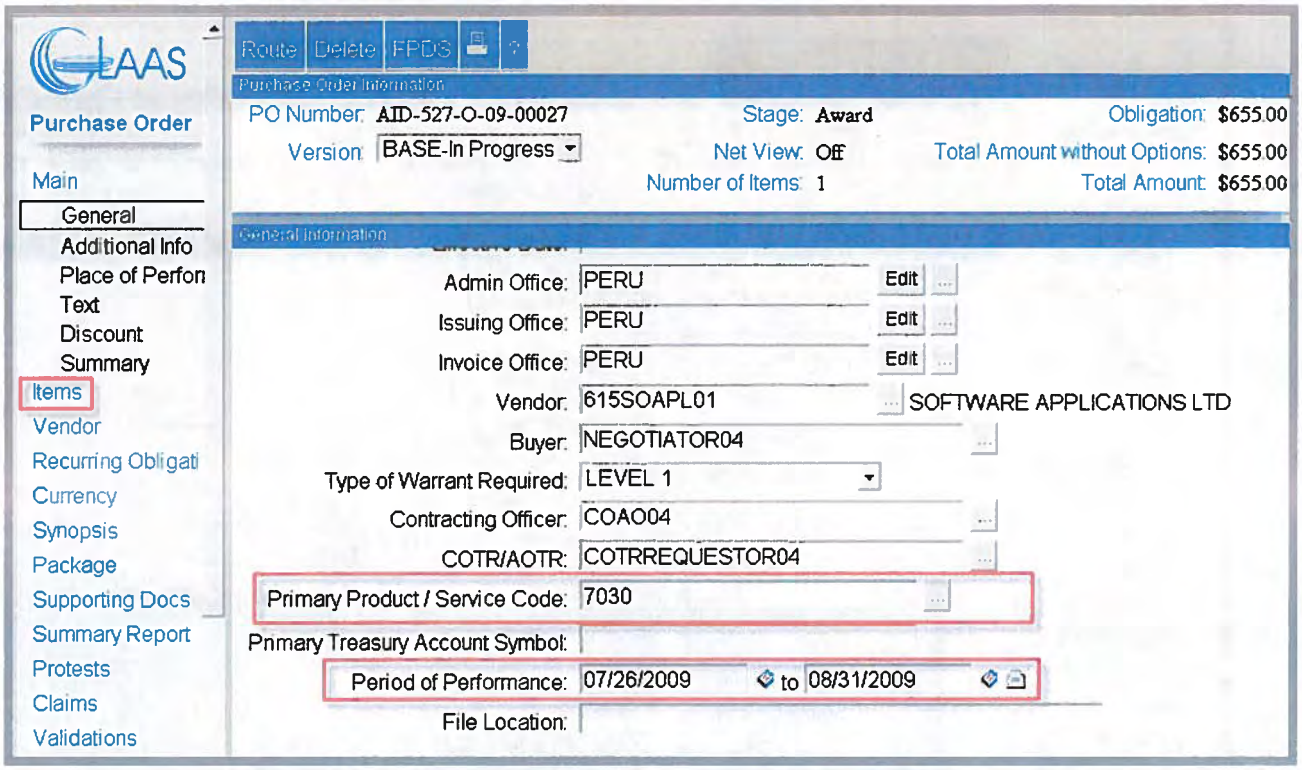


Figure 7: Main / General Screen

Steps	Section	User Action	Guidance
12.	Main / General	Complete the following Required (R) and/or Optional (O) fields: **Primary Product/Service Code:** Select the code for the goods or services on the award used to report to FPDS-NG. — R **Period of Performance:** Enter the current active period of the award. — R **File Location:** Enter the physical location of any related files. — O	**Primary Treasury Account Symbol** will be automatically populated by Phoenix once validations have been done. (Do NOT manually populate this field.)
13.	Main / General	Click the **Items** link on the left-hand menu.	

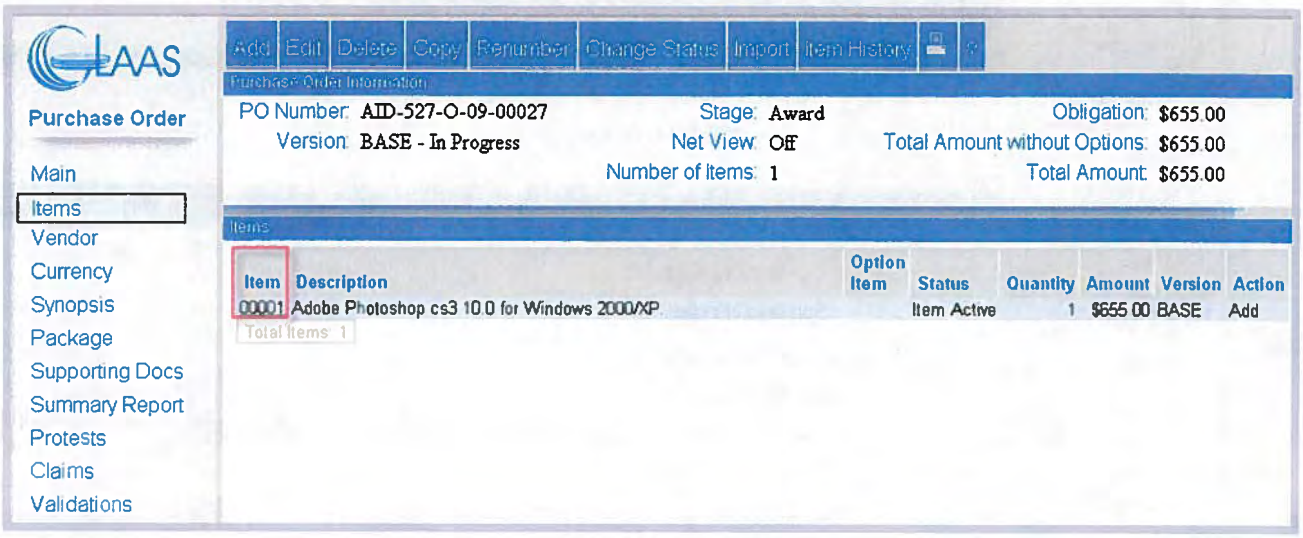


Figure 8: Main / Group Screen

Steps	Section	User Action	Guidance
14.	Main / Group	Click an **Item** number link.	

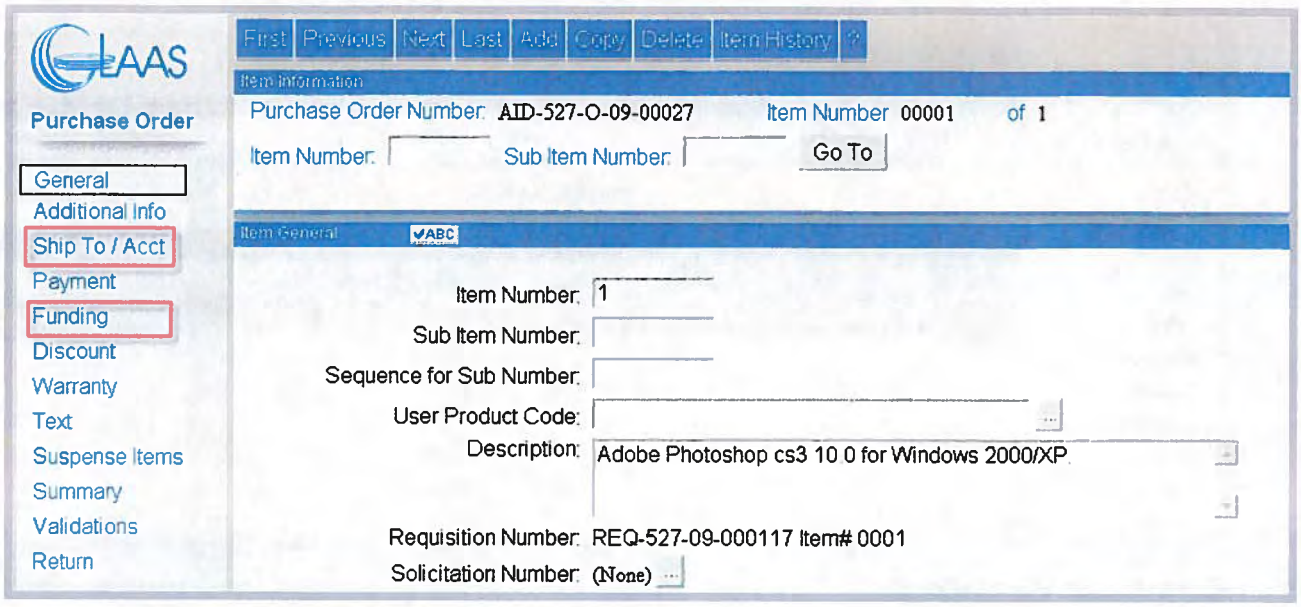


Figure 9: Items / General Screen

Steps	Section	User Action	Guidance
15.	Items / General	Click the **Funding** link on the left-hand menu.	This user guide assumes all required fields have been populated. Refer to the *Creating a Contract from a Requisition* user guide for additional information.

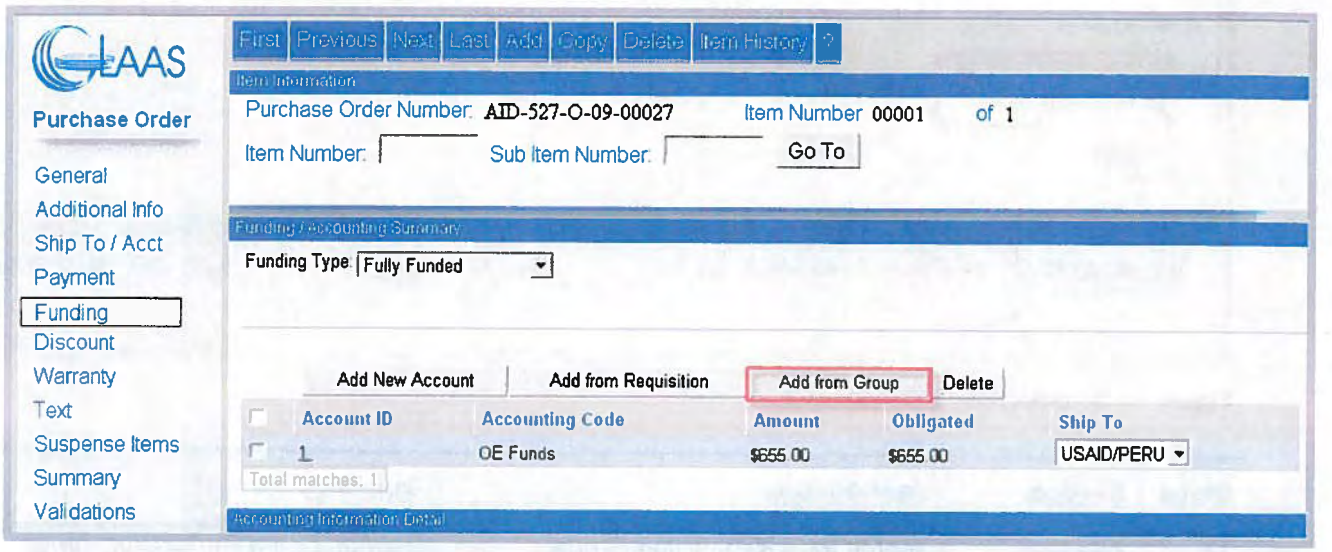


Figure 10: Funding / Accounting Summary Screen

Steps	Section	User Action	Guidance
16.	Funding / Accounting Summary	Click the **Add from Group** button.	**Accounting** and **Ship To** information will be pulled in from the Requisition(s).

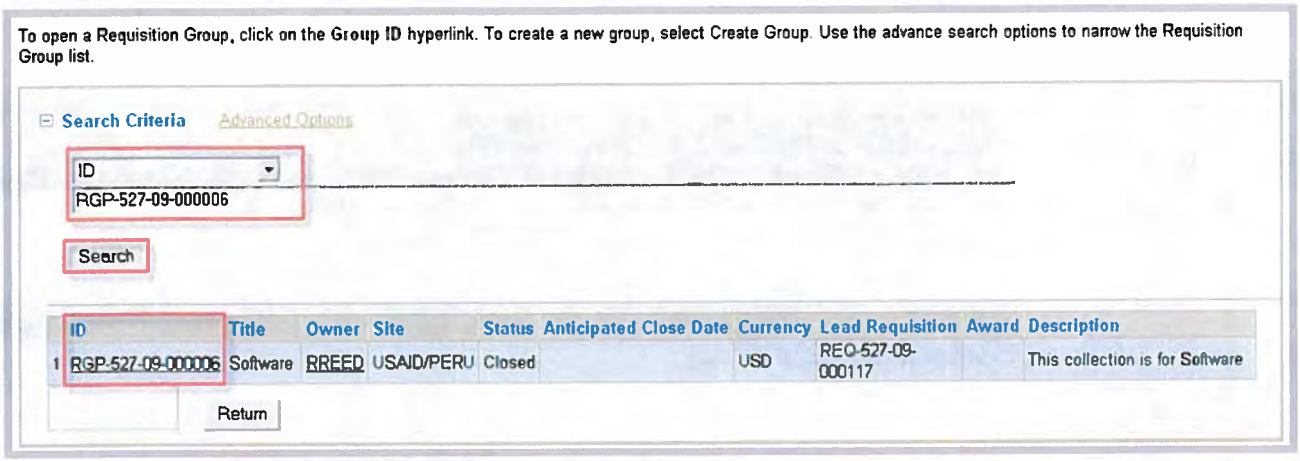


Figure 11: Search Criteria Screen

Steps	Section	User Action	Guidance
17.	Search Criteria	Search for a Requisition Group number using one of the following fields: • **ID** • **Title** • **Owner** • **Site** • **Anticipated Closed Date** • **Currency** • **Lead Requisition** • **Award Description**	Search for the Requisition Group based on information provided by the Requestor that created the Requisition Group.
18.	Search Criteria	Click the **ID** number link of the Requisition Group.	

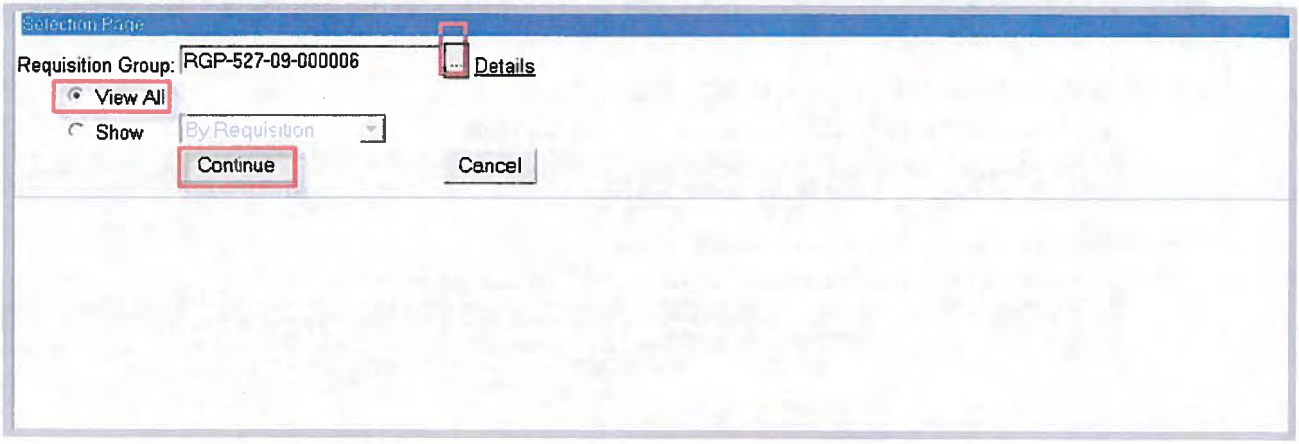


Figure 12: Selection Page Screen

Steps	Section	User Action	Guidance
19.	Selection Page	Verify the **Requisition Group** number. OR Click the **Lookup** button to search for Requisition Group number.	If the award was created from the Lead Requisition, the Requisition Group field will default to the Requisition Group Number. If the award was created from a Solicitation, use the Lookup button to search for the Requisition Group.
20.	Selection Page	Select the **View All** radio button.	You can view the accounting information in four different ways: by requisition, by item, by accounting lines and by unfunded.
21.	Selection Page	Click the **Continue** button.	

Confirmation

Award: AID-527-O-09-00027 Award Line: 1

REQ-527-09-000117 ; Originating Office: USAID_PERU ; Status: Released

1 ; Qty: 1 ; Amount: $655.00 ; Descr: Adobe Photoshop cs3 10.0 for Windows 2000/XP.

	Acct ID	Amount	Amount Remaining	Unawarded Amount	Start BFY	End BFY	Fund	Operating Unit (OP)	Program Area
	1	$655.00	$0.00	$655.00	2009		OE	PERU	

REQ-527-09-000118 ; Originating Office: USAID_PERU ; Status: Released

1 ; Qty: 1 ; Amount: $430.00 ; Descr: Macromedia Dreamwaver cs3 9.0 for Windows 2000/XP

	Acct ID	Amount	Amount Remaining	Unawarded Amount	Start BFY	End BFY	Fund	Operating Unit (OP)	Program Area
	2	$430.00	$430.00	$430.00	2009		OE	PERU	

Edit Selection | Update View | Add to Award | Cancel

Figure 13: Confirmation Screen

Steps	Section	User Action	Guidance
22.	Confirmation	Select the **Requisitions**, **Line Items**, and/or **Accounting Lines** you wish to add to the award.	
23.	Confirmation	Click the **Add to Award** button.	
24.	Funding / Accounting Summary	Verify the **Ship To** and the **Item General Amount** is correct (not shown).	
25.	Funding / Accounting Summary	Refer to the *Creating a Contract from a Requisition* user guide to continue creating this contract.	

USAID
FROM THE AMERICAN PEOPLE

GLAAS: Reports

November 2009

Customized Reports

- At the end of this topic, you will know:
  - The difference between:
    - GLAAS Standard reports
    - BOE Customized reports
  - Useful reports

GLAAS Reports

- All GLAAS users can run A&A reports
- There are two types of reports within GLAAS:
  - GLAAS Standard Reports
    - Standard reports that run against the production database
    - Show up-to-the-minute data
  - BOE Customized Reports
    - Reports developed by the GLAAS project to meet USAID's needs
    - Show data that is up to one day old

GLAAS Reports

- GLAAS Standard Reports:
  - Are part of the standard GLAAS functionality
  - Provide workload and basic A&A data
  - Use parameters that allow users to request specific report data
  - May be viewed and printed as PDF files
- BOE Customized Reports:
  - Created in Business Objects, a web-based reporting tool
  - Combine GLAAS, NMS and Phoenix data
  - Can be scheduled to run at different times
  - Can be exported to Excel and PDF

Useful Reports for COTR/AOTRs, Requestors, and PMs

- GLAAS Standard Reports
  - Awarded Actions for all Vendors
  - Requisition Status Reports
  - Un-awarded Actions Reports
  - Un-awarded Line Item Reports
- BOE Customized Reports
  - Approved Award Actions
  - Expired/Expiring Awards
  - Awards by Vendor Name/Country
- Phoenix Viewer is another useful source of financial reporting

Useful Reports for A&A Specialists and COs

- GLAAS Standard Reports
  - Award Summary Report for Released Awards
  - Awarded Actions Reports
  - Buyer Workload Report for all Buyers
  - Late Milestone Tasks Reports
  - Procurement Summary Report
  - Solicitation Close Date Reports
  - Un-awarded Action Reports
  - Un-awarded Line Item Reports
  - Upcoming Milestone Tasks Reports

Useful Reports for A&A Specialists and COs

- BOE Customized Reports
  - Approved Award Actions
  - Awarded Against Customer Service Standards
  - Expired/Expiring Awards
  - Workload Report
  - Awards with Weight
  - Acquisition, IAA and Assistance
  - Awards by Vendor Type/Category
  - Awards by Vendor Name/Country
  - Approved Awards by Instrument Type and Fiscal Year
  - Approved Awards by Action Type and Fiscal Year
  - Small Business Awards Performance

Useful Reports for Purchase Card Holders

- GLAAS Standard Reports
  - Award Summary Report for Released Awards
  - Awarded Actions Reports
  - Procurement Summary Report
- BOE Customized Reports
  - Approved Award Actions
  - Expired/Expiring Awards

GLAAS USER GUIDE:

FILLING OUT A FORM

PURPOSE:

This user guide will show you how to fill out and edit a form in a GLAAS document.

BEFORE STARTING:

In order to fill out a form you must have access to create or change a GLAAS document such as a Requisition, Award, etc.

STEPS:

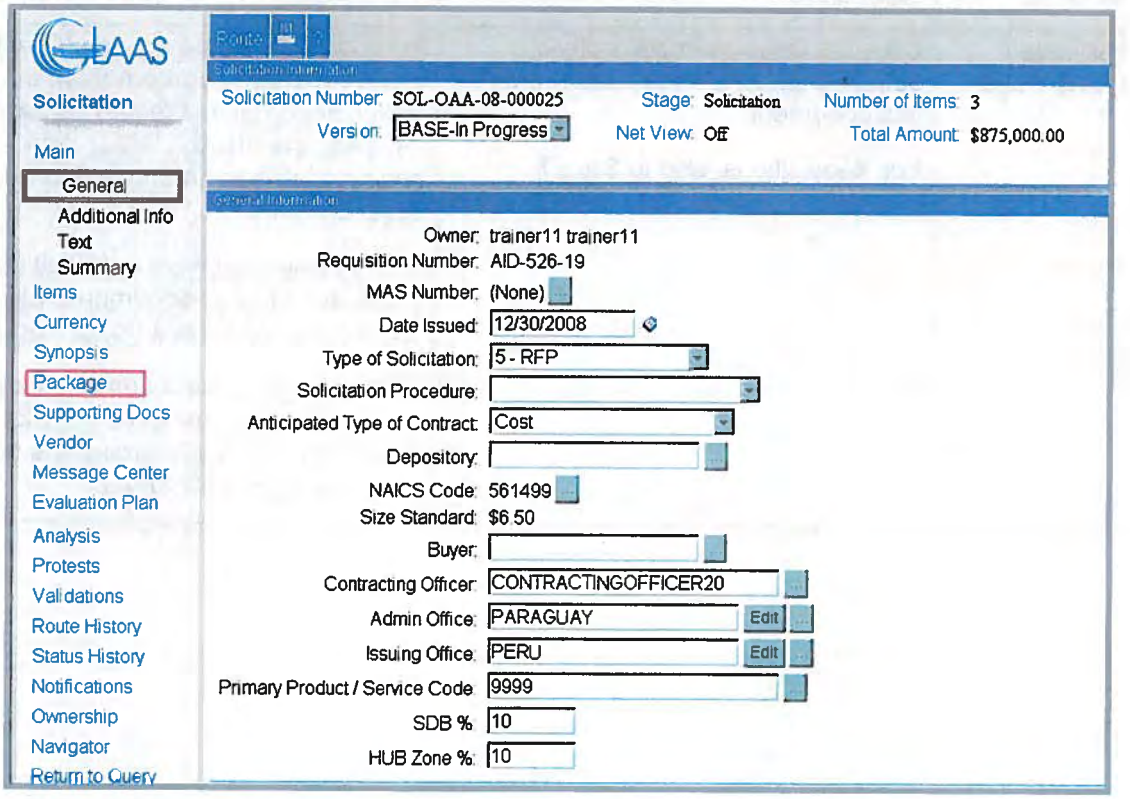


Figure 1: Main / General Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Open a GLAAS document (not shown).	
3.	Main / General	Click the **Package** link on the left-hand menu.	

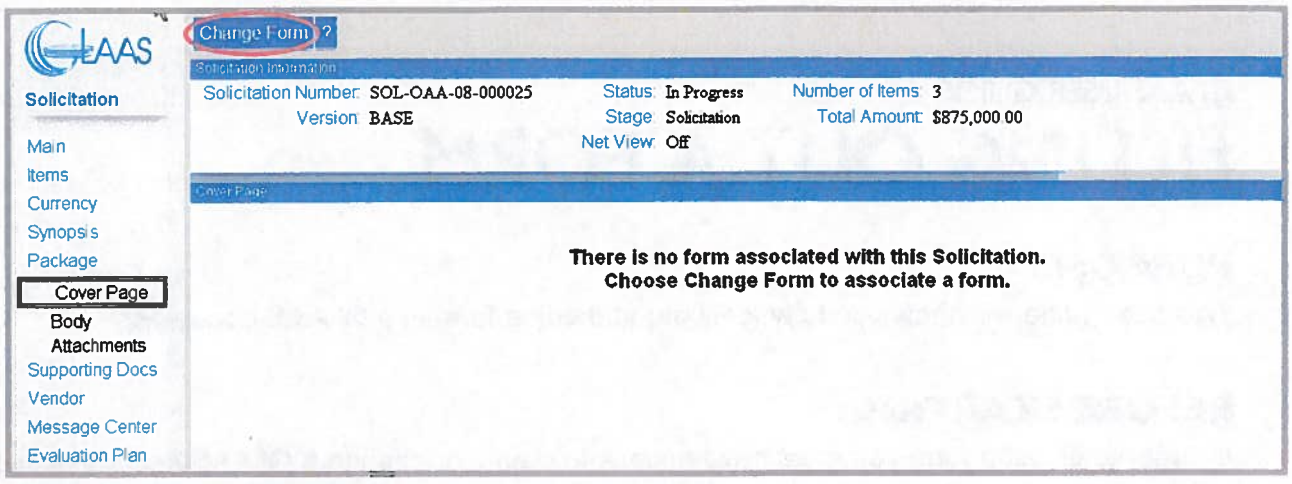


Figure 2: Package / Cover Page Screen

Steps	Section	User Action	Guidance
4.	Package / Cover Page	Click the **Change Form** toolbar button to select a Cover Page form for this document. For Requisitions, skip to **Step 7**.	For most assistance awards (Grants and Cooperative Agreements), the Cover Page will be created as part of the **Package / Body**, rather than having a left-hand menu option for a separate form. A Requisition will have a default Cover Page, but all other documents will require you to select a Cover Page. Although this walkthrough will show you how to fill out a cover page for a Solicitation, the basic process is the same for all GLAAS forms.

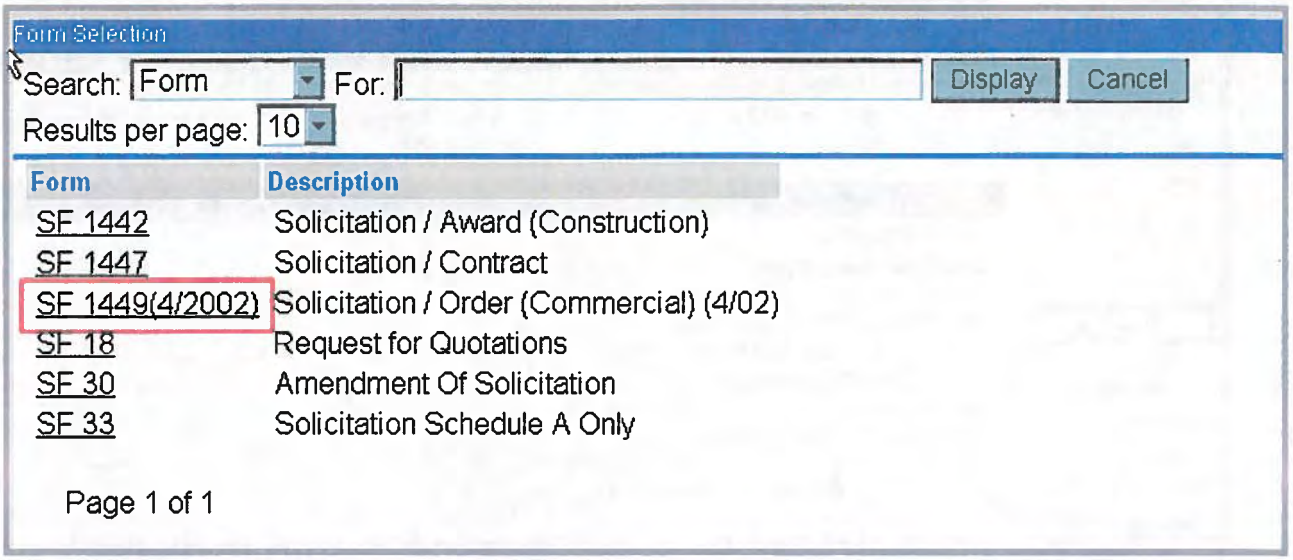


Figure 3: Form Selection Screen

Steps	Section	User Action	Guidance
5.	Form Selection	Click the **Form** link.	GLAAS displays a list of standard U.S. government documents.

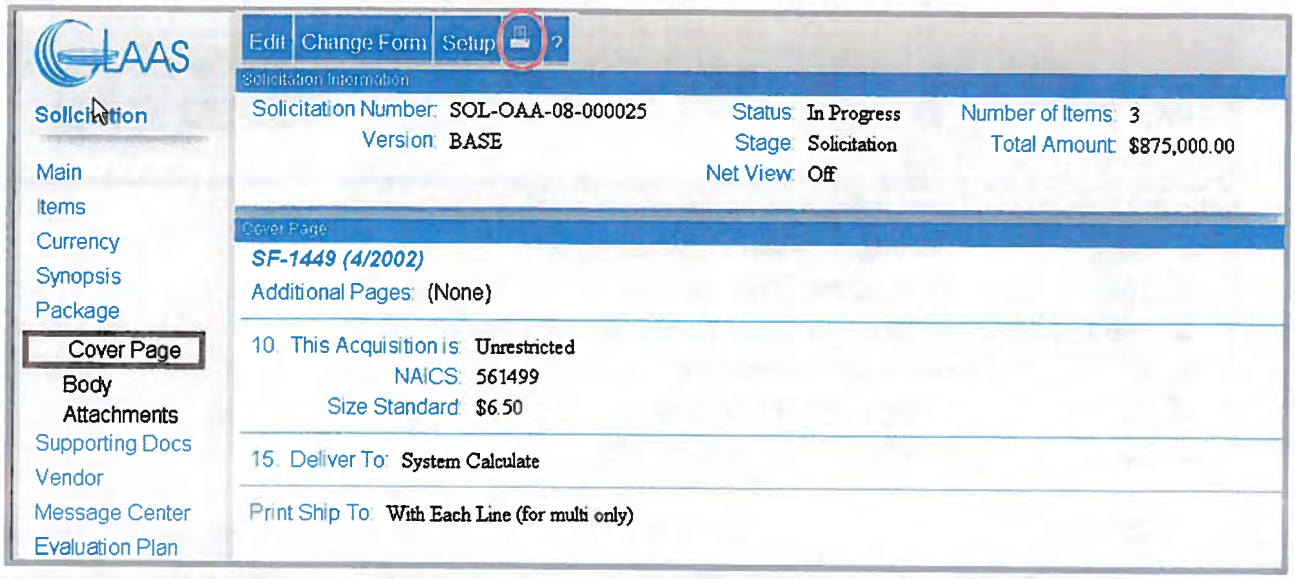


Figure 4: Package / Cover Page Screen

Steps	Section	User Action	Guidance
6.	Package / Cover Page	Review the **Cover Page** form number and information.	GLAAS displays the fields that can be edited on the Cover Page. If you have picked the wrong form, click the **Change Form** toolbar button to select a new form (see previous screen shot).
7.	Package / Cover Page	Click the printer toolbar button ( ) to preview this form.	GLAAS provides different choices of forms available for preview and printing based on the type of document. If working on a Requisition, skip to **Step 9.**

Figure 5: Forms Screen

Steps	Section	User Action	Guidance
8.	Forms	Click the **Form** link.	GLAAS displays a list of the forms that you can preview. This list will differ depending on the document. If you are working with a Solicitation, you may have the option to select a form addressed to a specific vendor.

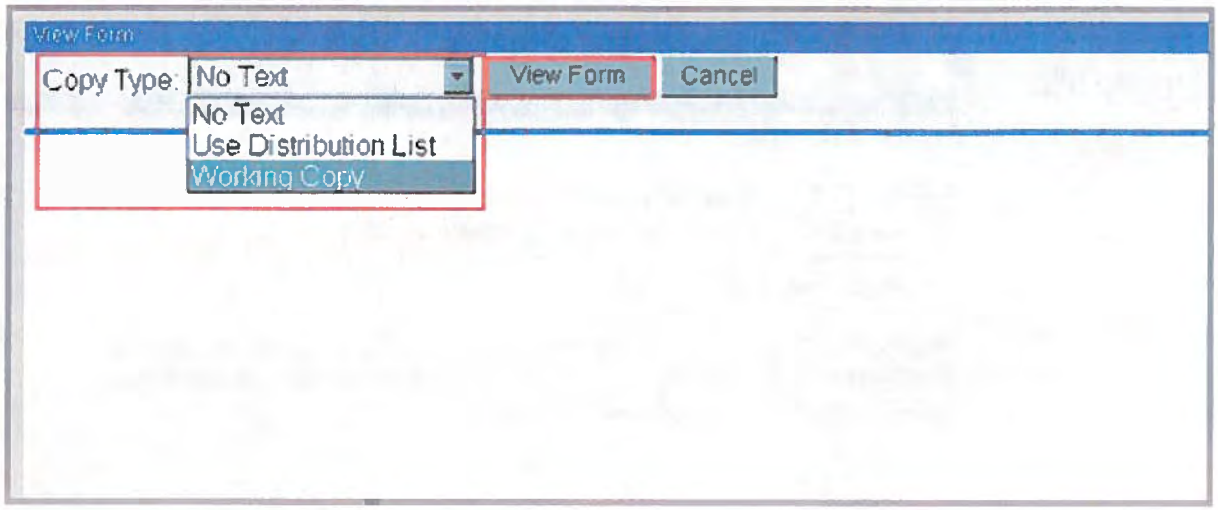


Figure 6: View Form Screen

Steps	Section	User Action	Guidance
9.	View Form	Select a **Copy Type** option.	The available **Copy Type** options are: • "No Text" – Do not include footer text in your preview copy. • "Use Distribution List" – Select a distribution list to print out in the footer text of your preview copy. • "Working Copy" – Select a cover page that says "Working Copy" in the footer text of the preview copy. Your **Copy Type** selection will only print once on the first page and should be used to signify a draft copy (see next page).
10.	View Form	Click the **View Form** button.	GLAAS will open a new browser window and display a PDF version of the Cover Page in Adobe Acrobat Reader.

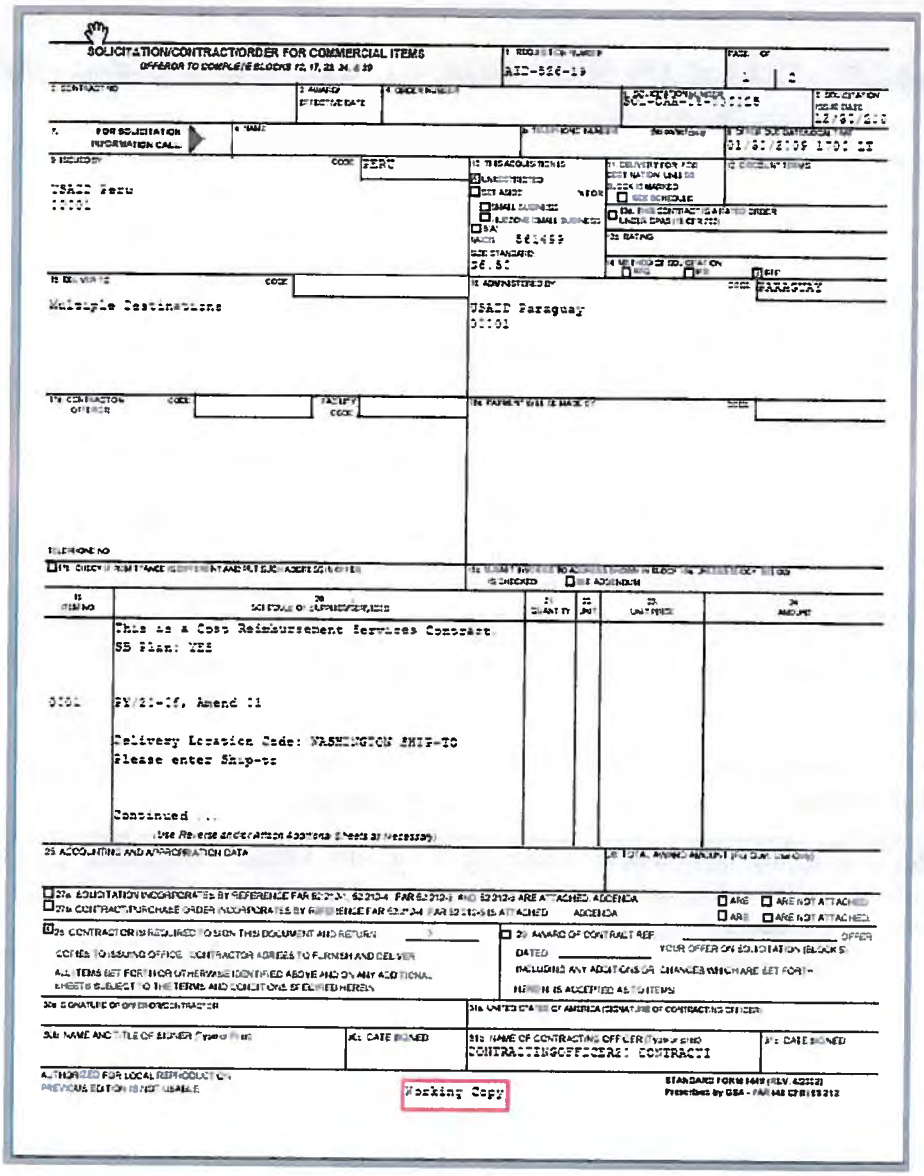


Figure 7: Adobe Acrobat Reader Screen

Steps	Section	User Action	Guidance
11.	Adobe Acrobat Reader	Review the form for accuracy. When you finish with the PDF document, close the Adobe Acrobat Reader window and return to GLAAS.	You can save, print and/or email this form like any other PDF document. If you do not see the form, make sure that you have Adobe Acrobat Reader installed on your computer.

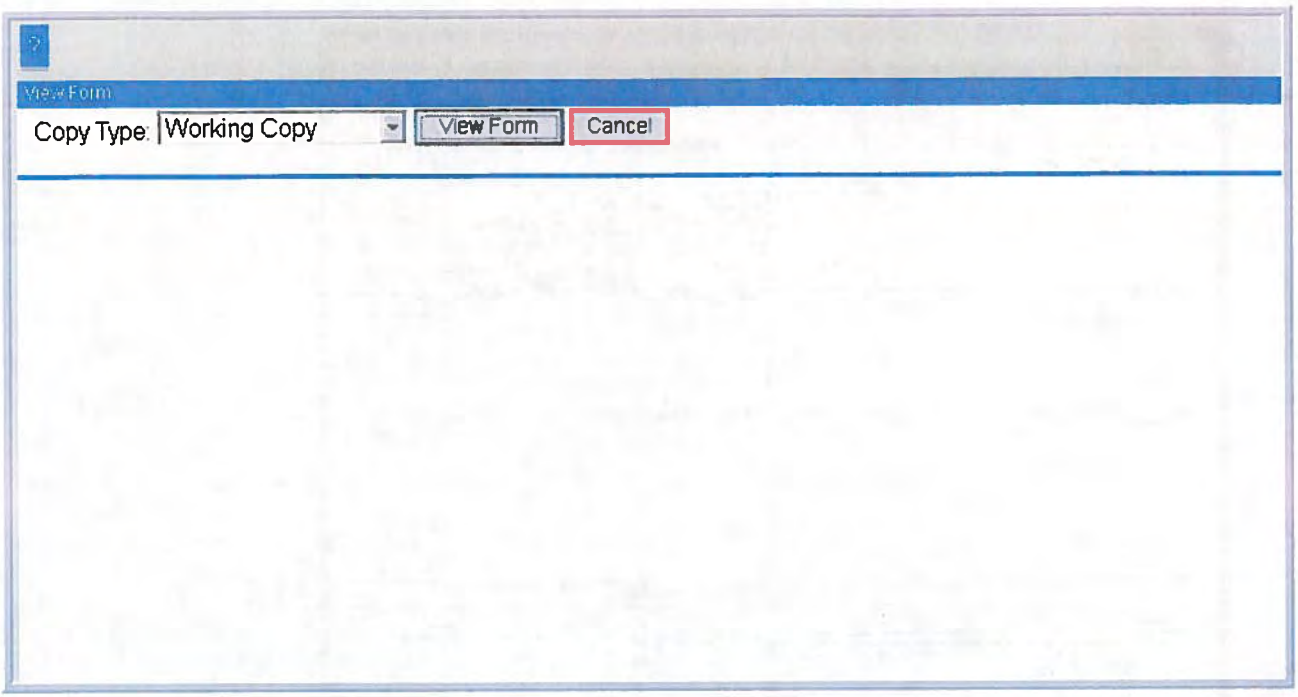


Figure 8: View Form Screen

Steps	Section	User Action	Guidance
12.	View Form	After you review the printable version of the form, click the **Cancel** button to return to the **Cover Page** screen.	The PDF version of the form will not close until that specific window is closed.

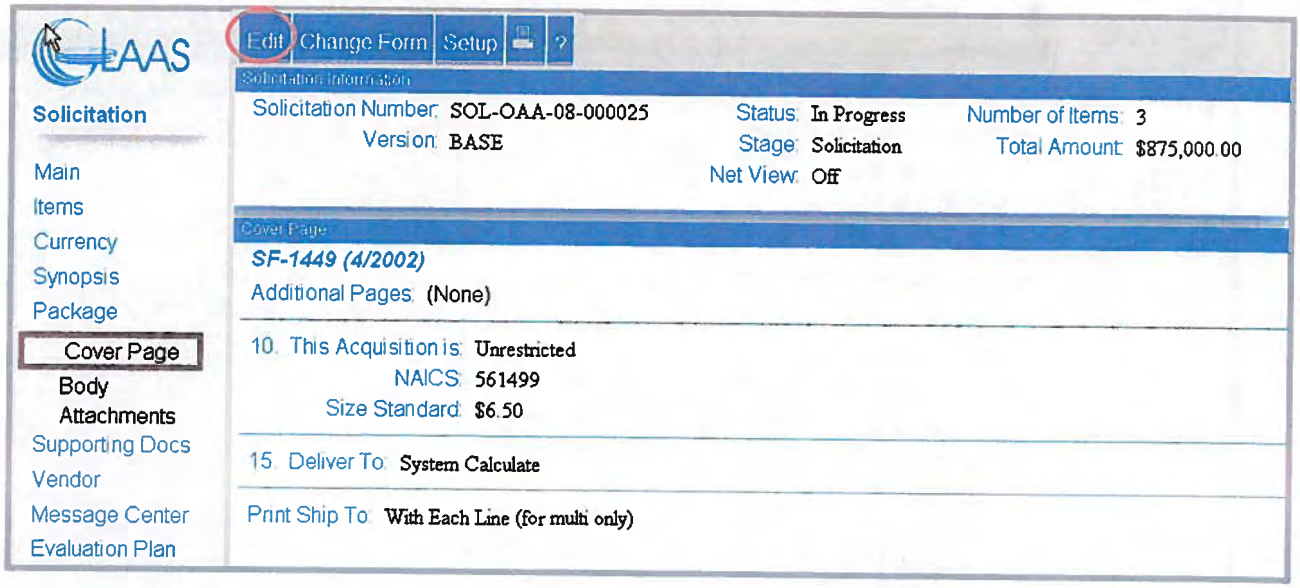


Figure 9: Package / Cover Page Screen

Steps	Section	User Action	Guidance
13.	Package / Cover Page	Click the **Edit** toolbar button to make changes to the cover page.	GLAAS displays the fields that can be edited on the Cover Page. GLAAS allows you to change the default fields that will be printed out on the Cover Page.

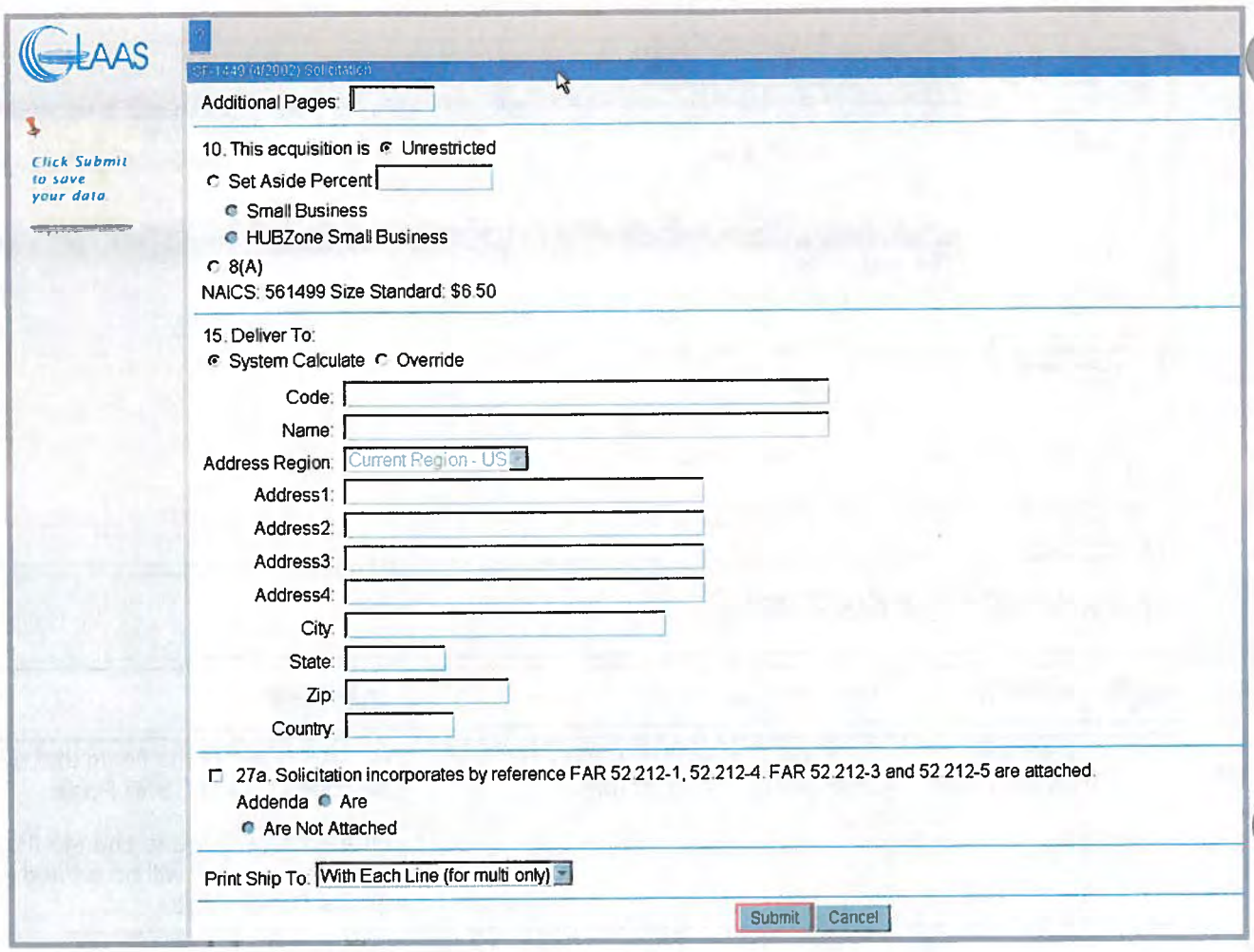


Figure 10: Form Title Screen

Steps	Section	User Action	Guidance
14.	Form Title	Review and update the Cover Page fields. When you have finished updating these values, click the **Submit** button to save your changes.	The fields on this screen will vary depending on the form and document you are using. Some fields require editing before a document can be "Released." Always check that your form has been filled out properly.

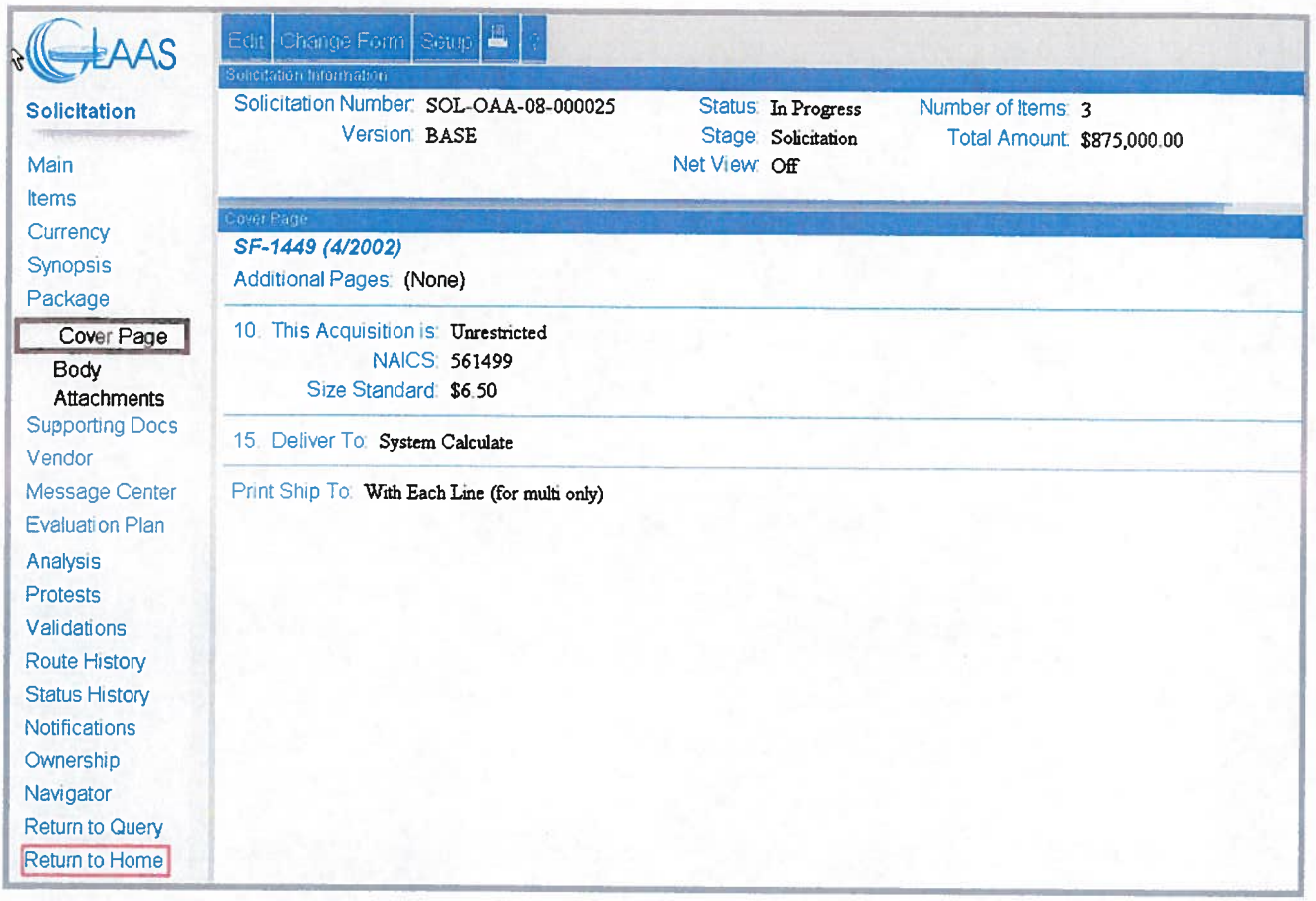


Figure 11: Package / Cover Page Screen

Steps	Section	User Action	Guidance
15.	Package / Cover Page	Check and review changes made to the Cover Page.	Changes made to the Cover Page will appear on the GLAAS **Cover Page** screen and on any printed form generated from GLAAS. Click the printer toolbar button ( ) to view the form again (**Steps 7-12**).
16.	Package / Cover Page	You have finished filling out this form. Continue working on your GLAAS document, or click the **Return to Home** link to return to the GLAAS **Welcome** screen.	The *Adding Attachments and Supporting Documents* user guide describes how to add and remove attachments and supporting documentation in more detail.

GLAAS 102 USER GUIDE:

WORKING WITH CLAUSES

PURPOSE:

This user guide will show you how to work with clauses on acquisition awards. If you are working on an assistance award, please refer to the *Creating an Assistance Award* user guide.

BEFORE STARTING:

1. You must open a Solicitation or an award document that is currently "In Progress."
2. A&A Specialists and Contracting/Agreement Officers can work with clauses to create award documents.

STEPS:

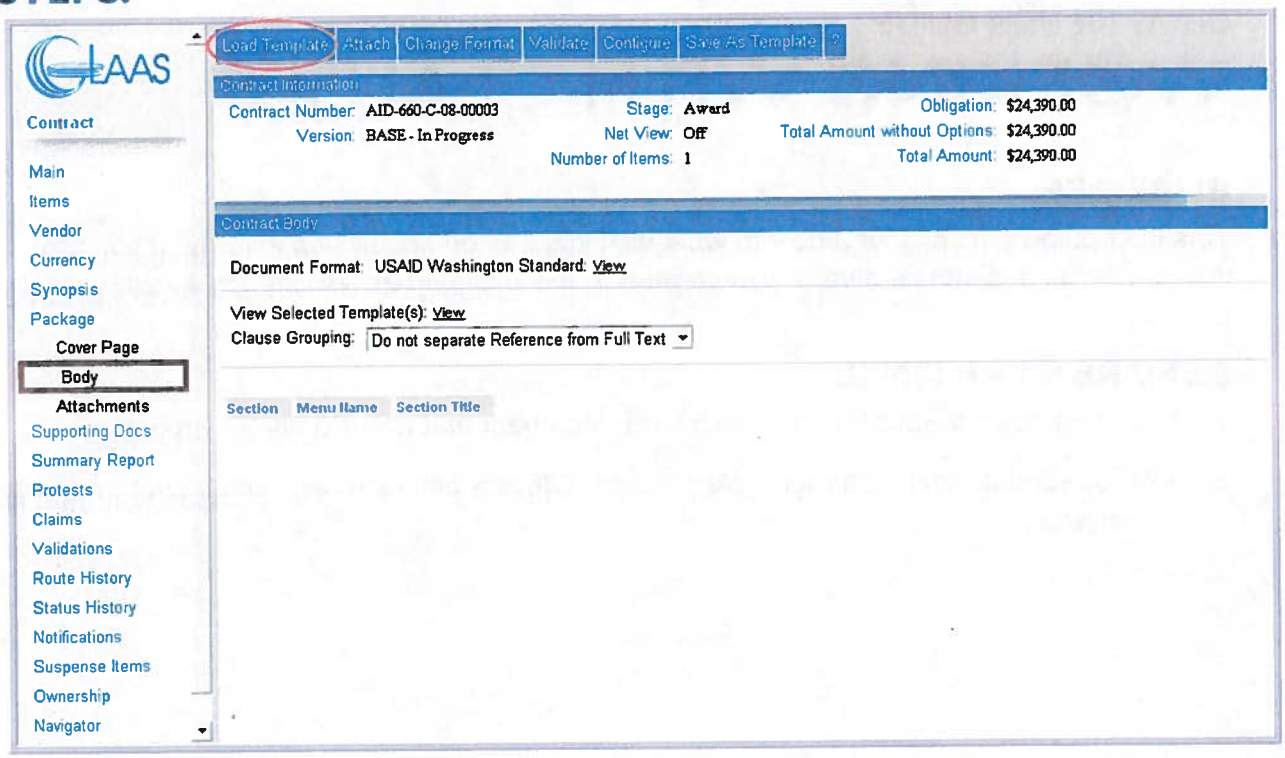


Figure 1: Package / Body Screen

Steps	Section	User Action	Guidance
1.	Main / General	Open the GLAAS award document you are working on (not shown). Click the **Package** link on the left-hand menu (not shown).	If you have already loaded a clause template, either from a solicitation or from the **Document Create** screen, skip to **Step 7**.
2.	Package / Cover Page	Click the **Body** link on the left-hand menu (not shown).	
3.	Package / Body	Click the **Load Template** toolbar button.	

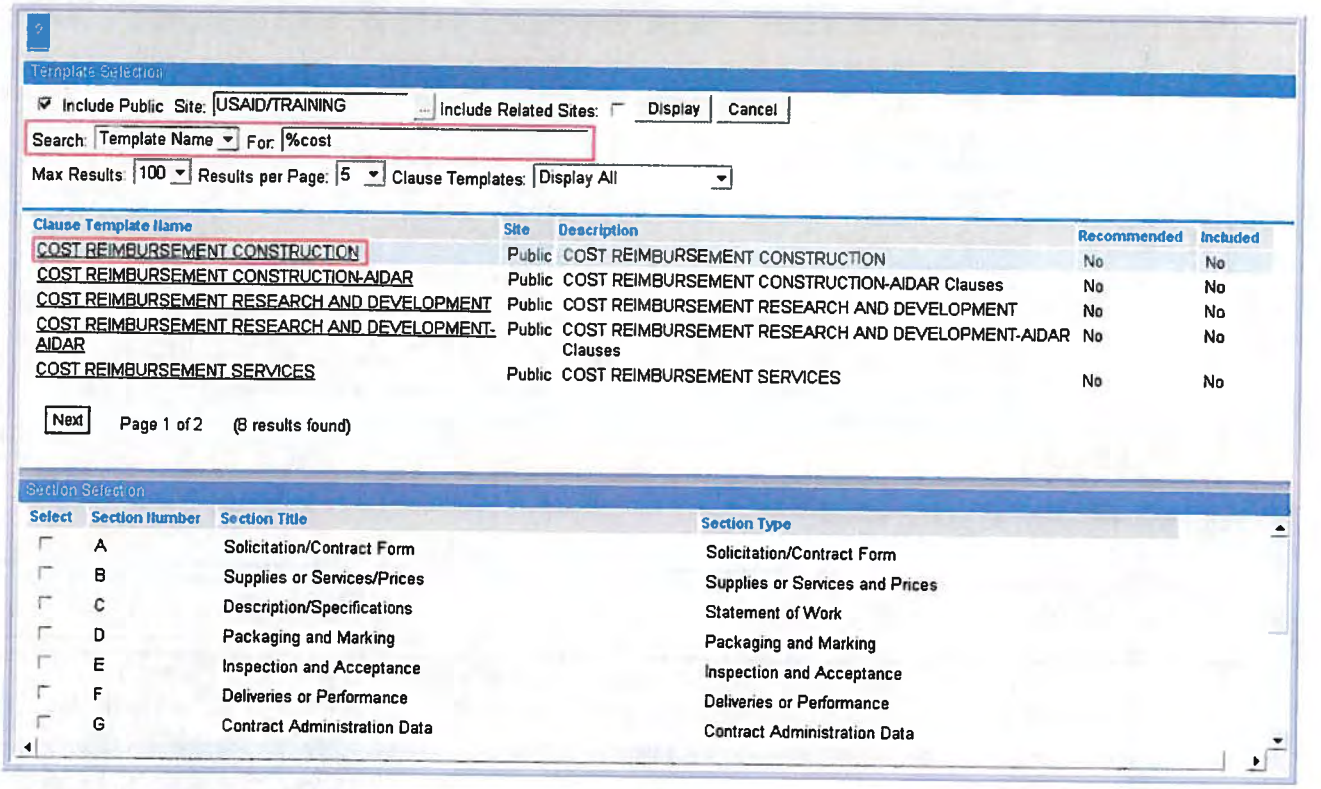


Figure 2: Template Selection Screen

Steps	Section	User Action	Guidance
4.	Template Selection	Search for the appropriate **Clause Template**. Click the **Clause Template Name** link to view the template sections.	Clause Templates are frequently grouped by FAR and AIDAR clauses. Templates ending with "AIDAR" contain the AIDAR clauses. All other templates contain the FAR clauses. If you are merging the FAR and AIDAR templates, always load the FAR clauses first.

Section Selection

Select	Section Number	Section Title	Section Type
☑	A	Solicitation/Contract Form	Solicitation/Contract Form
☑	B	Supplies or Services/Prices	Supplies or Services and Prices
☑	C	Description/Specifications	Statement of Work
☑	D	Packaging and Marking	Packaging and Marking
☑	E	Inspection and Acceptance	Inspection and Acceptance
☑	F	Deliveries or Performance	Deliveries or Performance
☑	G	Contract Administration Data	Contract Administration Data
☑	H	Special Contract Requirements	Special Contract Requirements
☑	I	Contract Clauses	Contract Clauses
☑	J	List of Documents, Exhibits and Other Attachments	List of Documents, Exhibits and Other Attachments
☐	K	Representations, Certifications, and Other Statements of Bidders	Representations, Certifications, and Other Statements of Bidders
☐	L	Instructions,Conditions, and Notices to Bidders	Instructions, Conditions, and Notices to Bidders
☐	M	Evaluation Factors for Award	Evaluation Criteria

Select All | Continue

Figure 3: Template Selection Screen

Steps	Section	User Action	Guidance
5.	Template Selection	Click the **Select All** button to include all of the clause sections in your document. OR Check or uncheck the boxes to select clause sections one at a time.	If you have loaded a UCF formatted template all the section titles will be loaded regardless if you ticked the box. You can use the **Configure** toolbar button later to delete extra sections.
6.	Template Selection	Click the **Continue** button.	

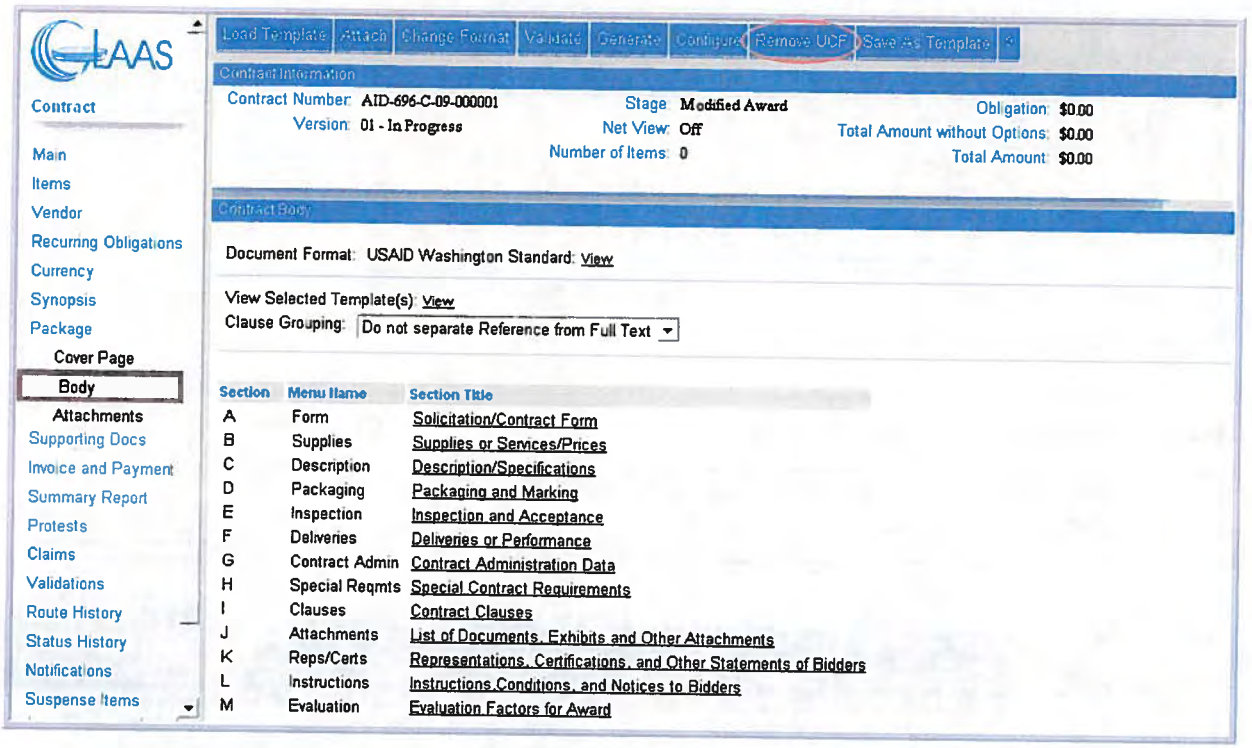


Figure 4: Package / Body Screen

Steps	Section	User Action	Guidance
7.	Package / Body	Click the **Remove UCF** toolbar button if you need to merge AIDAR clauses into the FAR clauses you have just loaded. If you do not need to merge the AIDAR clauses, proceed to **Step 11**.	The **Generate** toolbar button generates an .rtf file that contains the clauses and their sections. The **Configure** toolbar button allows you to edit how the section titles are printed on the body or to delete sections that are not needed.

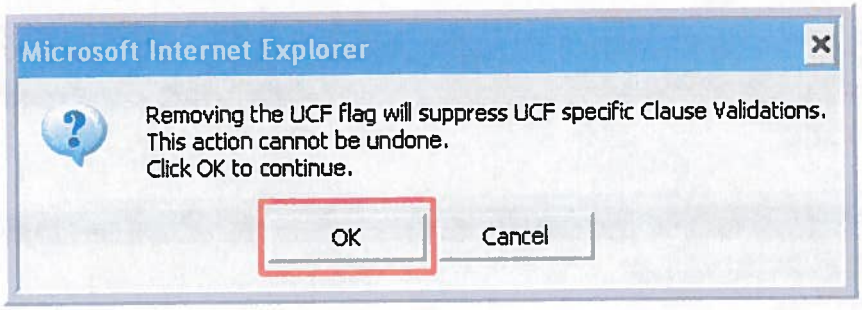


Figure 5: Package / Body Screen

Steps	Section	User Action	Guidance
8.	Package / Body	Click **OK** to confirm removing the UCF flag.	

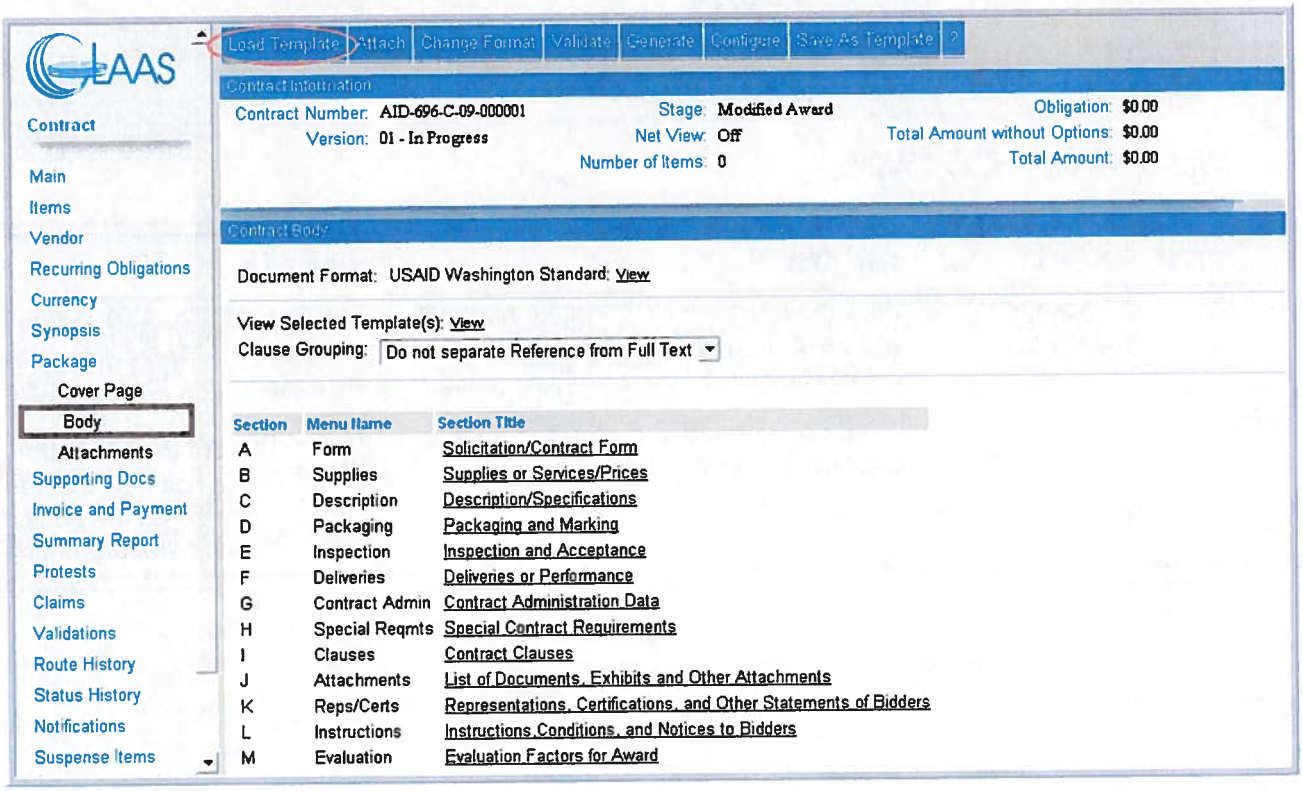


Figure 6: Package / Body Screen

Steps	Section	User Action	Guidance
9.	Package / Body	Click the **Load Template** toolbar button.	

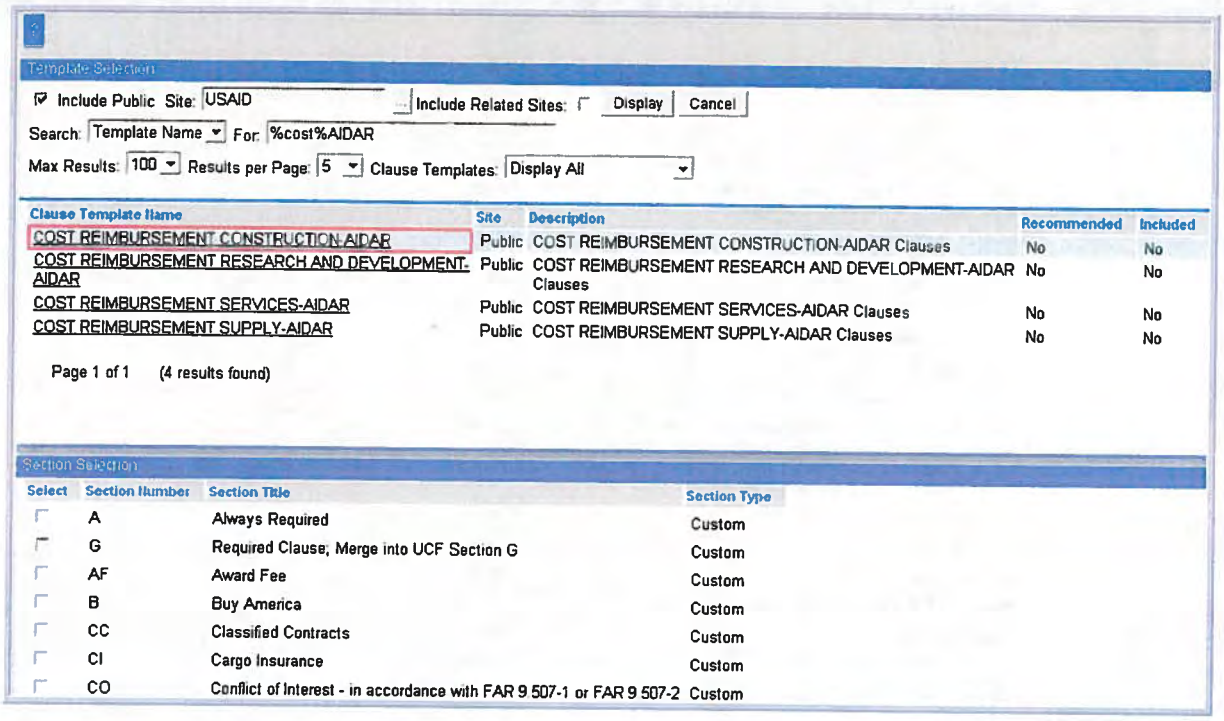


Figure 7: Template Selection Screen

Steps	Section	User Action	Guidance
10.	Template Selection	Search for the AIDAR template that you wish to include in your document. Select the template by clicking the **Clause Template Name.**	

Section Selection

☐	AF	Award Fee	Custom
☐	B	Buy America	Custom
☐	CC	Classified Contracts	Custom
☐	CI	Cargo Insurance	Custom
☐	CO	Conflict of Interest - in accordance with FAR 9.507-1 or FAR 9.507-2	Custom
☐	DBA	Worker's Compensation Insurance (Defense Base Act)	Custom
☐	F	Family Planning or Population Activities	Custom
☐	H	Research using Human Subjects	Custom
☐	HG	Host Government Employees	Custom
☐	LG	Letter of Credit Payment Type; Merge into UCF Section G	Custom
☐	M	Publications, Videos, or other Information Media Products	Custom
☐	O	Performance Overseas	Custom
☐	OD	Performance Overseas; Merge into UCF Section D	Custom
☐	OE	Performance Overseas and Educational Institution	Custom
☐	OS	Performance Overseas and Strategic Objective Agreement (SOAG)	Custom
☐	OT	Ocean Transportation Services	Custom
☐	PF	Program Funded	Custom
☐	PI	Public Interest	Custom
☐	T	Participant Training	Custom
☐	TE	Participant Training with an Educational Institution	Custom
☐	TO	Travel Overseas	Custom
☐	TP	Exceed Simple Acquisition Threshold and Performance Overseas	Custom
☐	U	USAID Small Business - when using FAR 19.708	Custom

Select All | Continue

Figure 8: Template Selection Screen

Steps	Section	User Action	Guidance
11.	Template Selection	Check the box next to each AIDAR section you wish to include in your award document. Click the **Continue** button.	

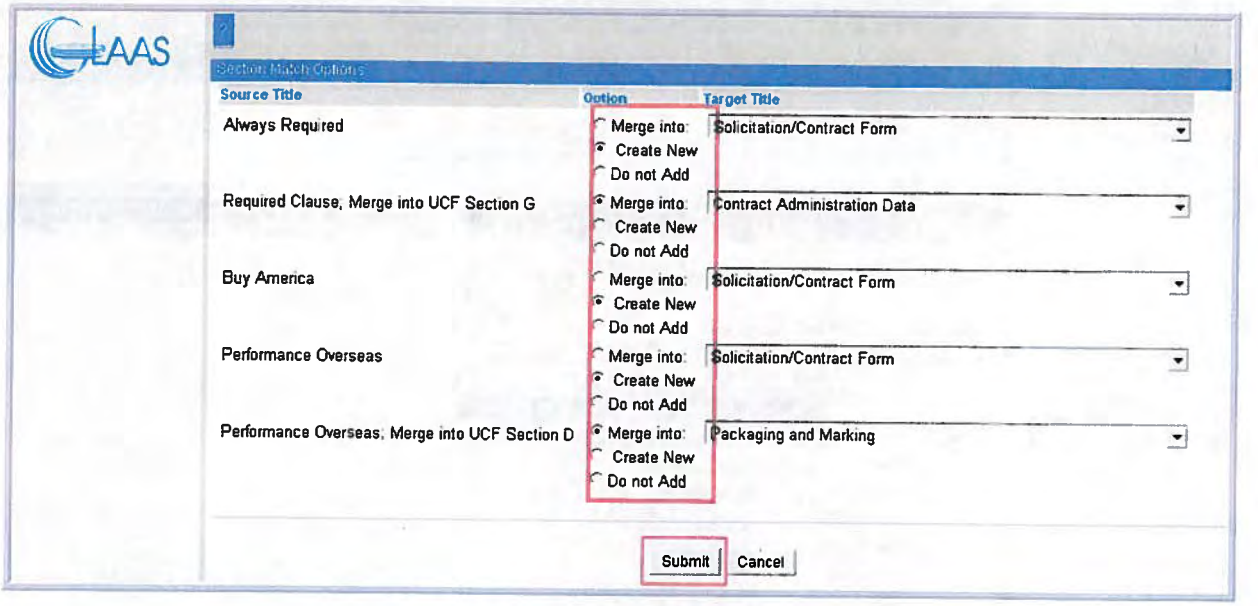


Figure 9: Section Match Options Screen

Steps	Section	User Action	Guidance
12.	Section Match Options	Select the **Merge Into** radio button and update the **Target Title** for all sections of the AIDAR that need to be merged into the FAR sections. Select the **Create New** radio button to create a new section for the AIDAR clauses. Select the **Do not Add** radio button if you no longer wish to add the AIDAR section to your award document. Click the **Submit** button.	

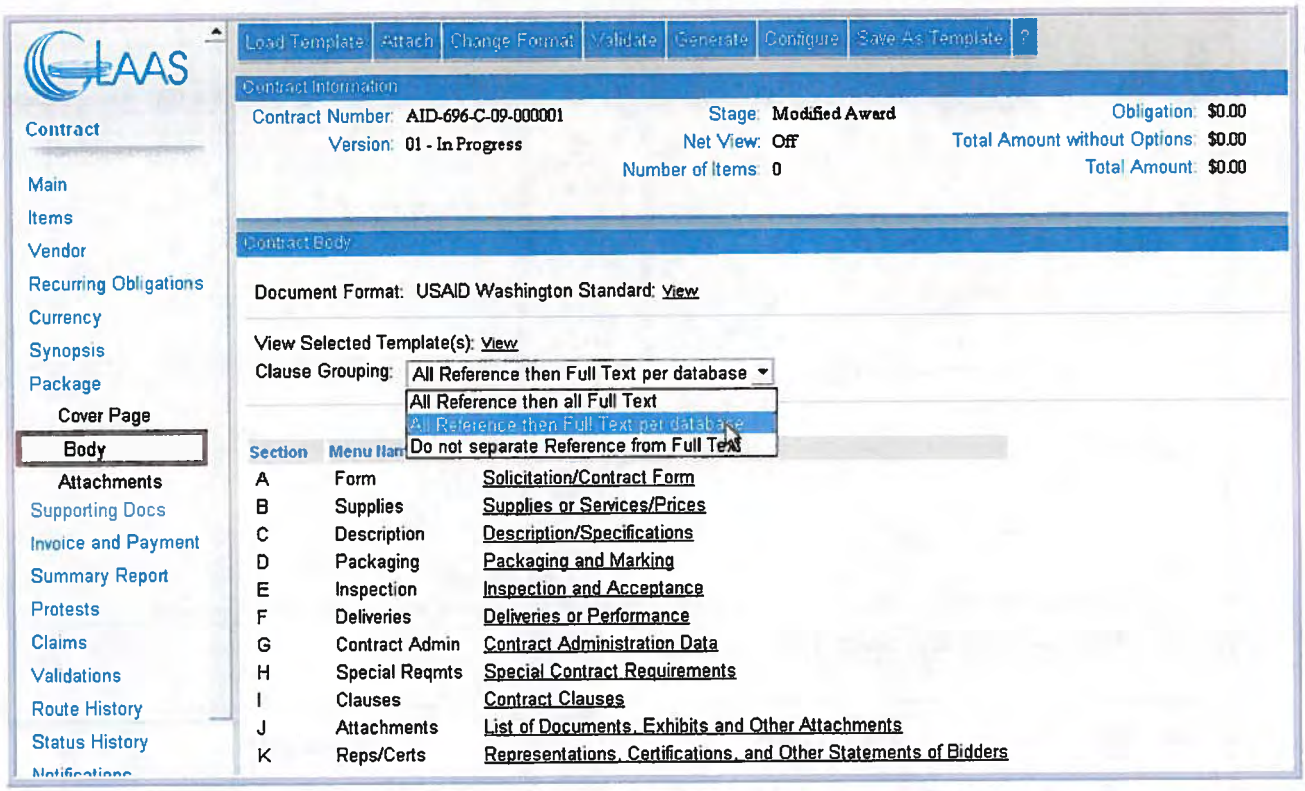


Figure 10: Package / Body Screen

Steps	Section	User Action	Guidance
13.	Package / Body	Select "All Reference then Full Text per database" for the **Clause Grouping**.	

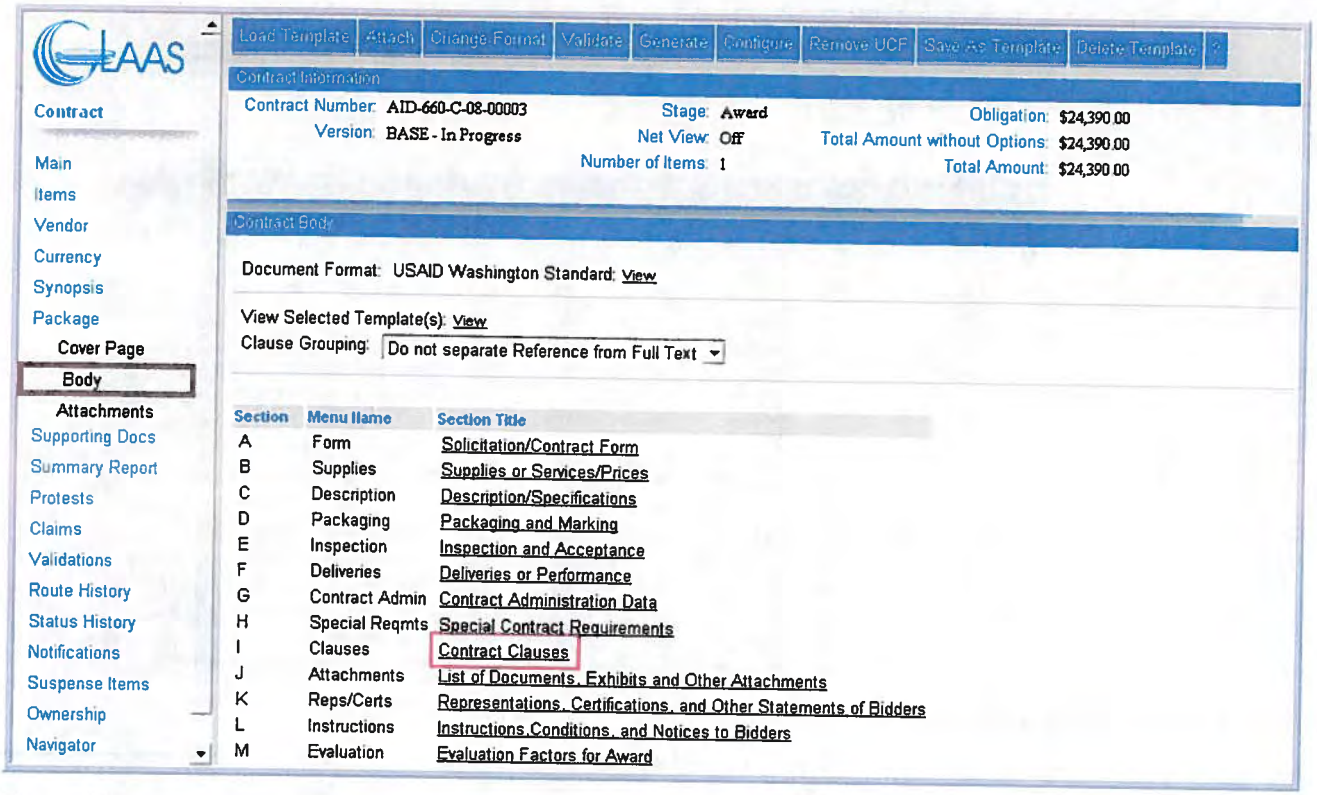


Figure 11: Package / Body Screen

Steps	Section	User Action	Guidance
14.	Package / Body	Click a **Section Title** link to view the clauses associated with that section and to add, remove, or edit clauses.	

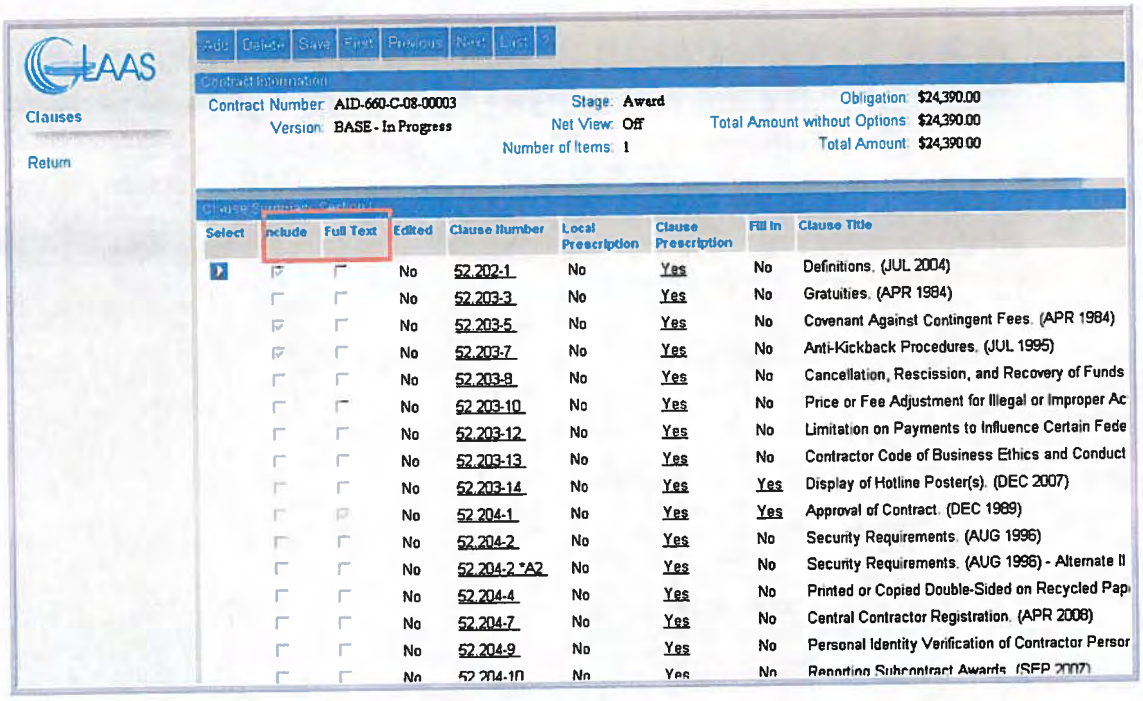


Figure 12: Clauses Screen

Steps	Section	User Action	Guidance
15.	Clauses	Check the box in the **Include** column next to any clauses you would like included in this section If the clauses you've checked need to have the full text included, check the box in the **Full Text** column. When you have finished selecting relevant clauses, click the **Return** link on the left-hand menu (not shown).	You will not be able to uncheck the box in the **Include** column if the template requires you to include specific clauses. You will not be able to uncheck the box in the **Full Text** column if the template requires you to include the full text of the clause. Click the **First**, **Previous**, **Next** or **Last** toolbar buttons to move through the various sections of the Clause Template (i.e., from Section A to Section B). The **Add** toolbar button allows you to add additional FAR clauses to the section if they were not included in the template. Click the **Yes** link under **Local Prescription** for instructions from USAID on how to use a clause. Click the **Yes** link under **Clause Prescription** for instructions from the FAR on how to use a clause.

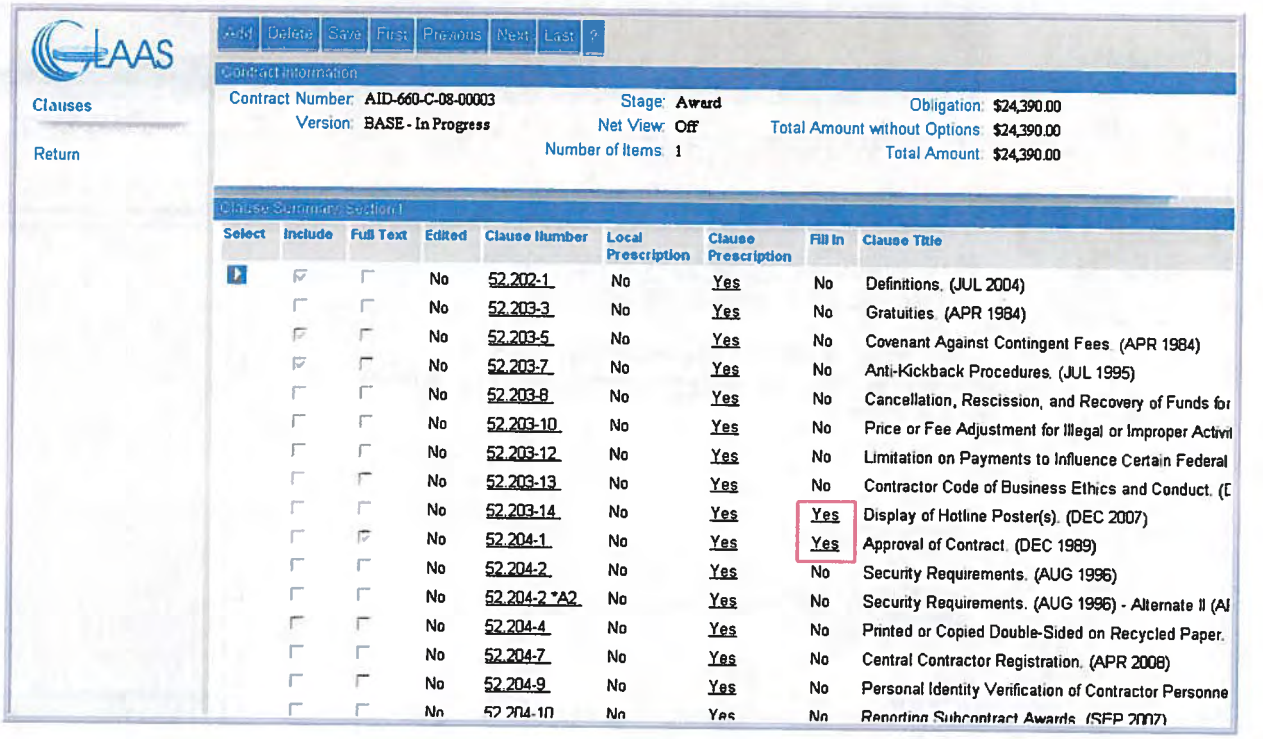


Figure 13: Clauses Screen

Steps	Section	User Action	Guidance
16.	Clauses	Click a **Yes** link in the **Fill In** column to fill in the blanks in a clause.	Some clauses have blanks that must be filled in.

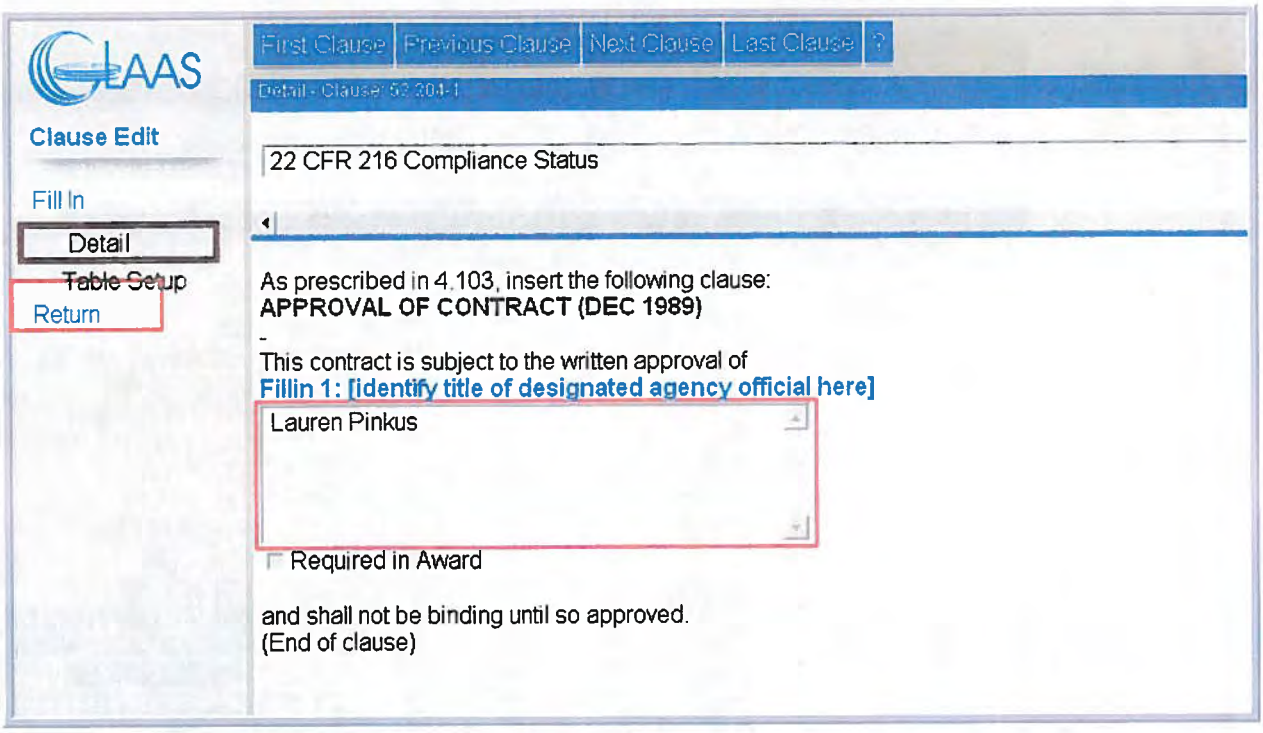


Figure 14: Fill in / Detail Screen

Steps	Section	User Action	Guidance
17.	Fill In / Detail	Enter the necessary text in the text box for each required fill-in. OR If the information needed in the fill-in blank is already stored in a GLAAS field, you can choose a field name from the drop-down list at the top of the screen. Then click the **Insert PRISM Field** button to fill in the text box with the information in that field (not shown). Click the **Return** link on the left-hand menu.	
18.	Clauses	Click the **Return** link on the left-hand menu (not shown).	

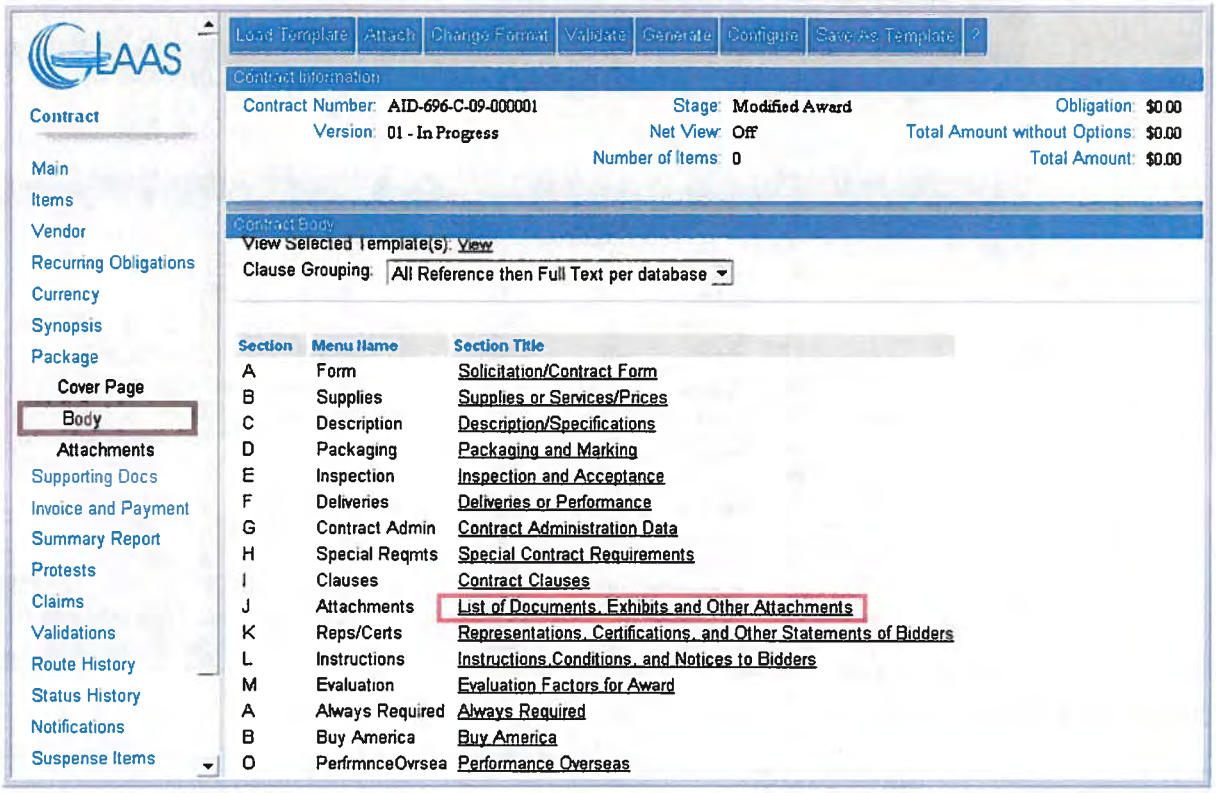


Figure 15: Package / Body Screen

Steps	Section	User Action	Guidance
19.	Package / Body	Click the **Return** link on the left-hand menu (not shown). Repeat **Steps 14-18** for any additional template sections you need to select clauses for. Skip to **Step 23** if you do not need to manually search for and add FAR or AIDAR clauses. Click on the **Section Title** of the section you would like to manually add clauses to.	

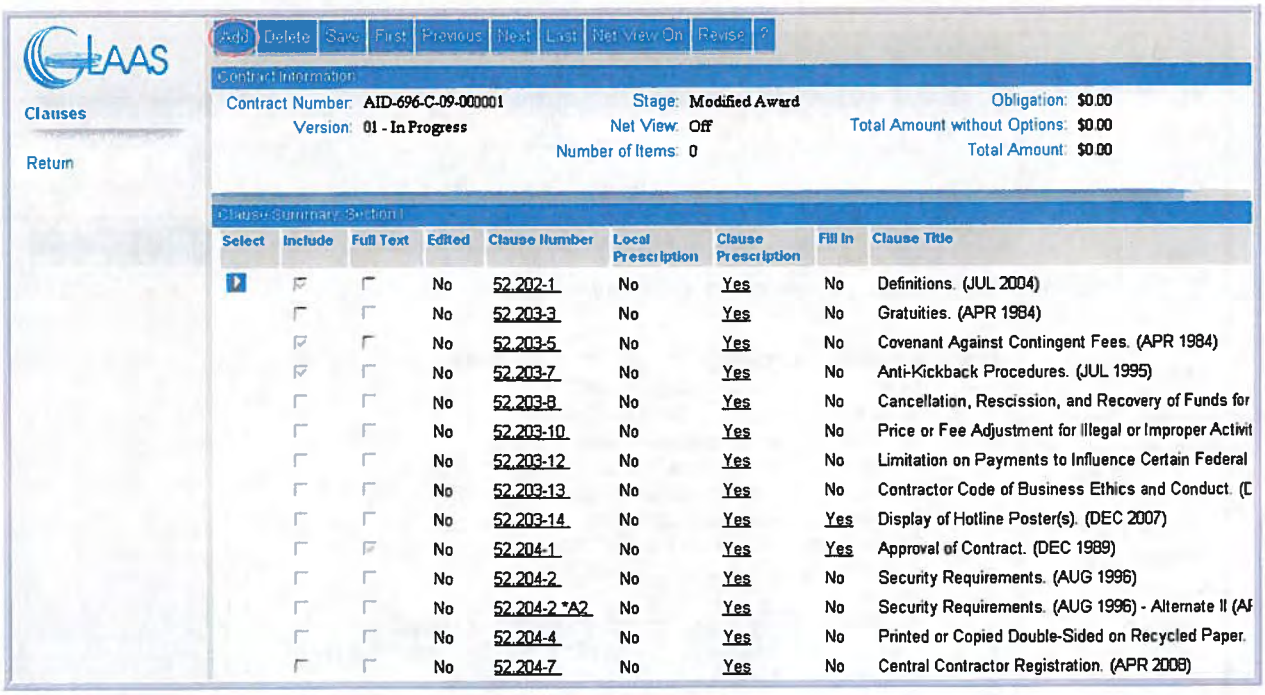
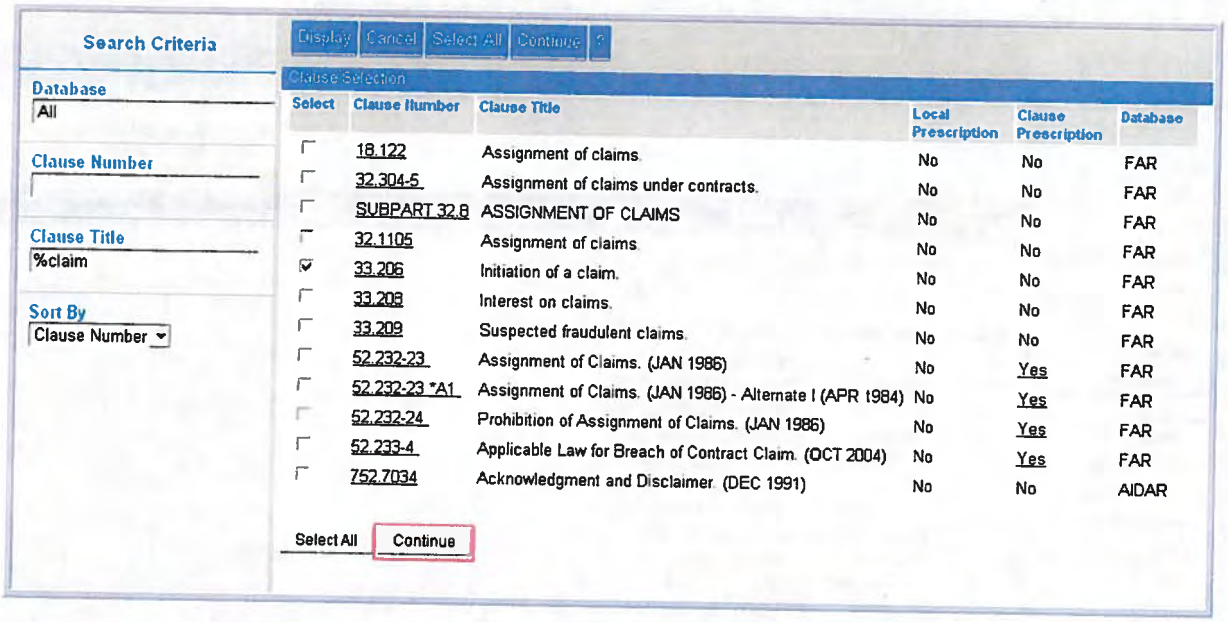


Figure 16: Clauses Screen

Steps	Section	User Action	Guidance
20.	Clauses	Click the **Add** toolbar button.	When searching for a clause you can use the wildcard (%) in either the **Clause Number** or **Clause Title** fields.



Search Criteria

Database: All

Clause Number:

Clause Title: %claim

Sort By: Clause Number

Display | Cancel | Select All | Continue | ?

Clause Selection

Select	Clause Number	Clause Title	Local Prescription	Clause Prescription	Database
☐	18.122	Assignment of claims.	No	No	FAR
☐	32.304-5	Assignment of claims under contracts.	No	No	FAR
☐	SUBPART 32.8	ASSIGNMENT OF CLAIMS	No	No	FAR
☐	32.1105	Assignment of claims.	No	No	FAR
☑	33.206	Initiation of a claim.	No	No	FAR
☐	33.208	Interest on claims.	No	No	FAR
☐	33.209	Suspected fraudulent claims.	No	No	FAR
☐	52.232-23	Assignment of Claims. (JAN 1986)	No	Yes	FAR
☐	52.232-23 *A1	Assignment of Claims. (JAN 1986) - Alternate I (APR 1984)	No	Yes	FAR
☐	52.232-24	Prohibition of Assignment of Claims. (JAN 1986)	No	Yes	FAR
☐	52.233-4	Applicable Law for Breach of Contract Claim. (OCT 2004)	No	Yes	FAR
☐	752.7034	Acknowledgment and Disclaimer. (DEC 1991)	No	No	AIDAR

Select All | Continue

Figure 17: Clause Selection Screen

Steps	Section	User Action	Guidance
21.	Clause Selection	Check the box next to the clause you would like to add to the current section. Click the **Continue** button.	
22.	Clause Inclusion	Check the box in the **Full Text** column if you wish to include the full text of the clause (not shown). Click the **Continue** button (not shown). Repeat **Steps 20-21** as needed, and then click the **Return** link on the left-hand menu (not shown).	

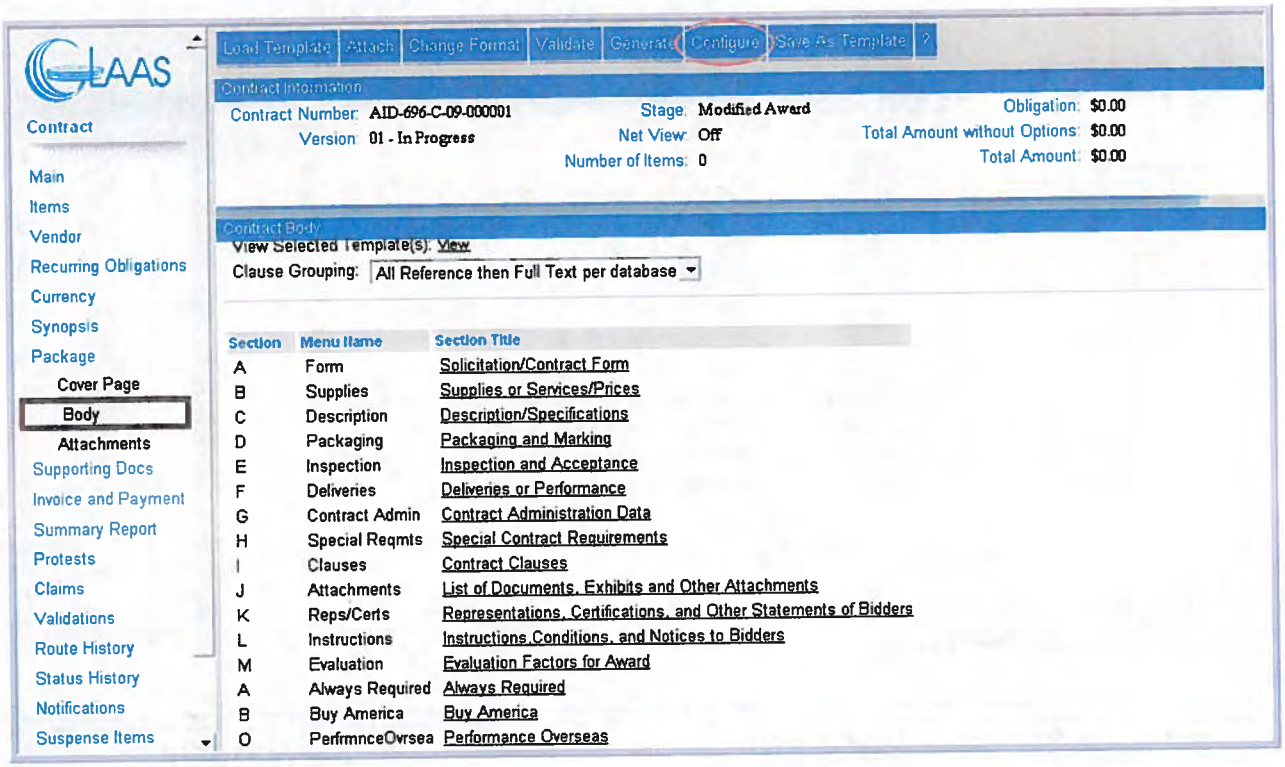


Figure 18: Package / Body Screen

Steps	Section	User Action	Guidance
23.	Package / Body	If you need to delete or rename template sections, click the **Configure** toolbar button. Otherwise, skip to **Step 25.**	

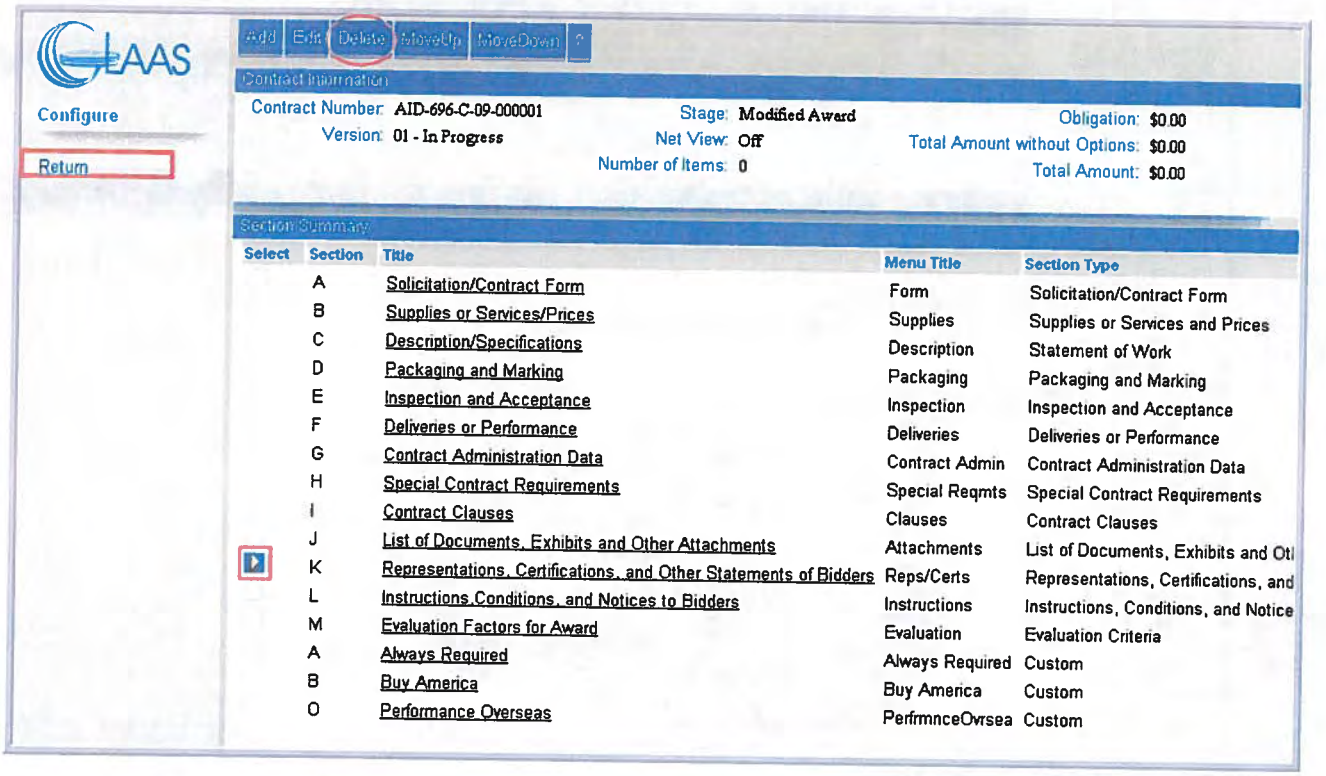


Figure 19: Configure Screen

Steps	Section	User Action	Guidance
24.	Configure	Click the box next to the section you want to delete. Click the **Delete** toolbar button to delete a section. Click **OK** to confirm the deletion when the Internet Explorer pop-up appears (not shown). Repeat this step for all sections you need to remove. Click the **Return** link on the left-hand menu.	

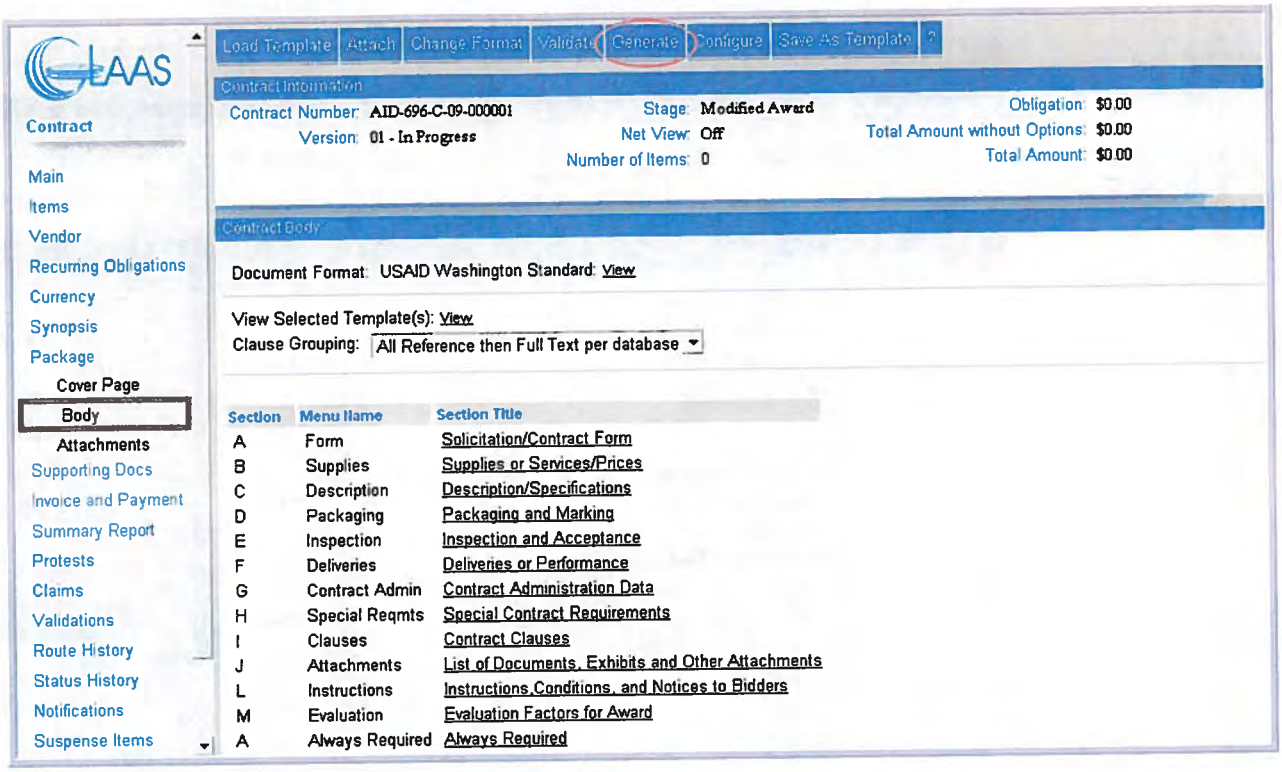


Figure 20: Package / Body Screen

Steps	Section	User Action	Guidance
25.	Package / Body	Click the **Generate** toolbar button.	You should only generate your body document when you have finished the preceding steps. If you need to make additional edits to the document inside of GLAAS, use the **Reopen** toolbar button to regain access to all of the clause sections.

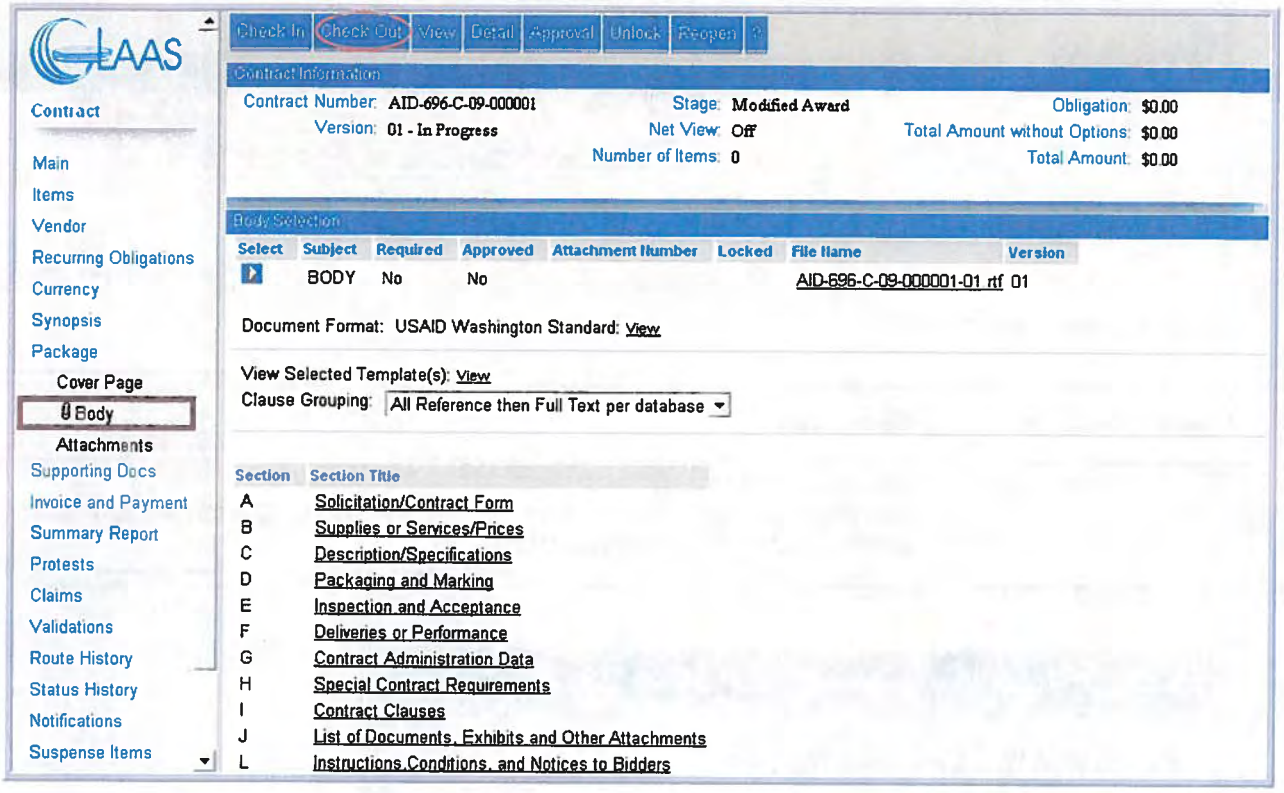


Figure 21: Package / Body Screen

Steps	Section	User Action	Guidance
26.	Package / Body	Click the **Check Out** toolbar button to view this document in Microsoft Word.	

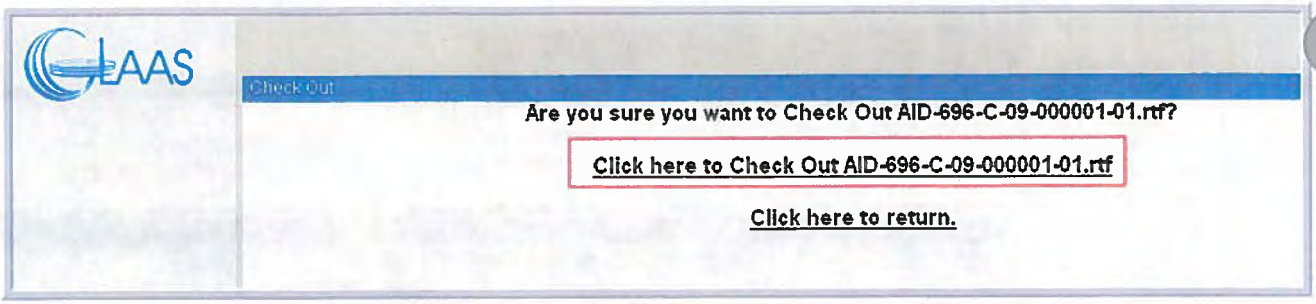


Figure 22: Check Out Screen

Steps	Section	User Action	Guidance
27.	Check Out	To confirm that you want to check the document out, click the link that reads: **Click here to Check Out...**	To cancel the check out, click the link that reads: **Click here to return.**

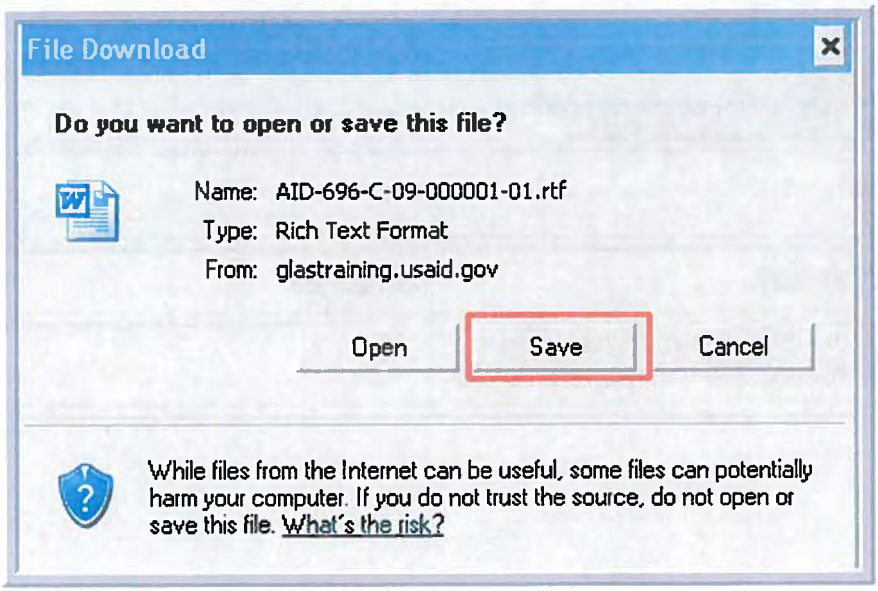


Figure 23: File Download Screen

Steps	Section	User Action	Guidance
28.	File Download	Click the **Save** button and save the document to the appropriate location on your hard drive.	To check the document back into the system, you must know the location of the saved document. The .rtf file name will match the document number. You must preserve that name in order to check the document back in.

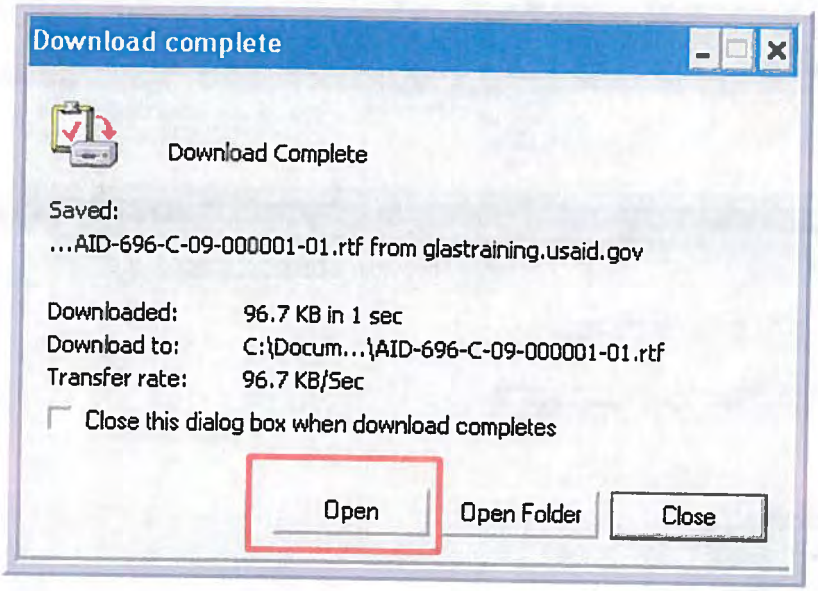


Figure 24: Check Out Screen

Steps	Section	User Action	Guidance
29.	Check Out	Click the **Open** button.	Microsoft Word will open the .rtf file and will allow you to make any edits. Make sure to save your changes and close down Microsoft Word.

Figure 25: Check Out Screen

Steps	Section	User Action	Guidance
30.	Check Out	Click the link: **Click here to return.**	

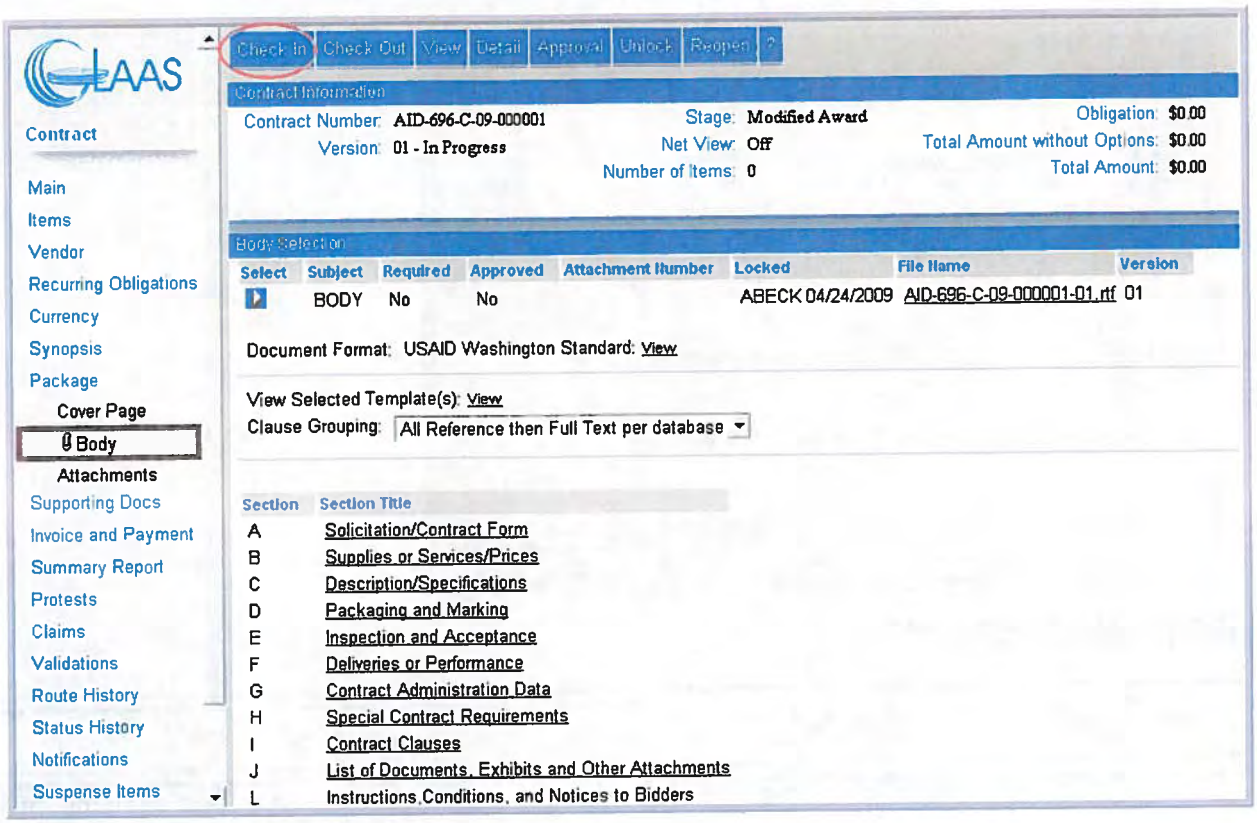


Figure 26: Package / Body Screen

Steps	Section	User Action	Guidance
31.	Package / Body	Click the **Check In** toolbar button.	Notice how the .rtf is **Locked** and displays your user id and the date it was checked out.

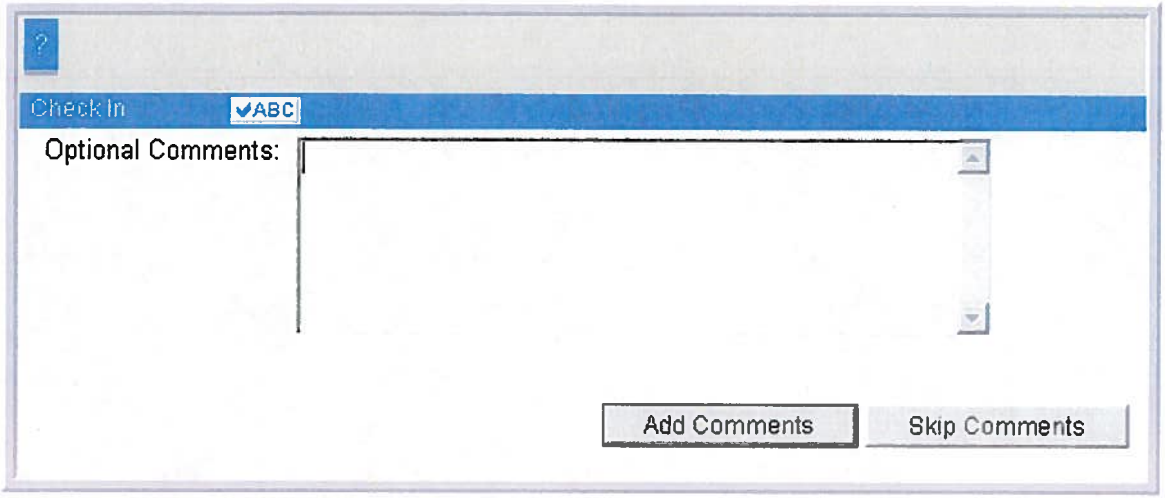


Figure 27: Check In Screen

Steps	Section	User Action	Guidance
32.	Check in	To enter remarks about the edits done to the body, enter them in and click the **Add Comments** button. OR Click the **Skip Comments** button.	

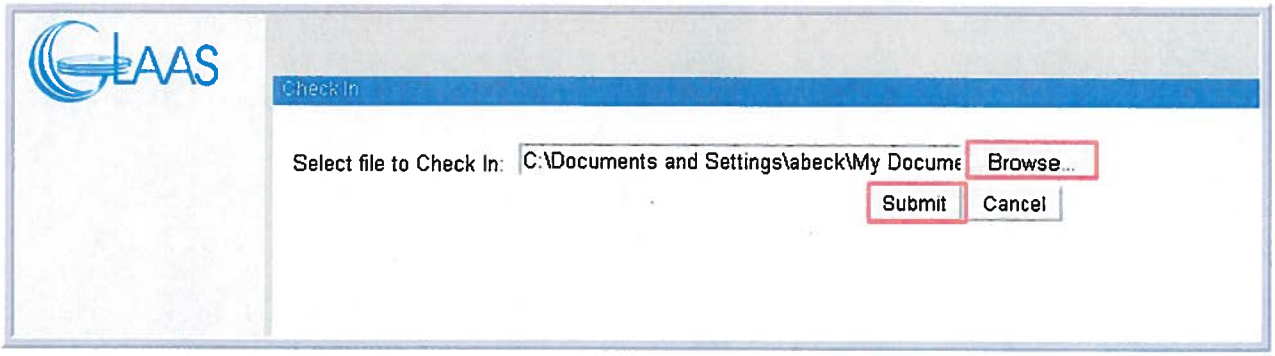


Figure 28: Check In Screen

Steps	Section	User Action	Guidance
33.	Check In	Click the **Browse** button to search for and locate the .rtf file on your computer. Click the **Submit** button once the path to the .rtf file is displayed in the **Select file to Check In** field.	You have completed generating the document body.

GLAAS USER GUIDE:

ADDING ATTACHMENTS AND SUPPORTING DOCUMENTATION

PURPOSE:

This user guide will show you how to add attachments and supporting documentation to a GLAAS document.

BEFORE STARTING:

In order to add attachments and supporting documentation you must have access to create or change a GLAAS document.

STEPS:

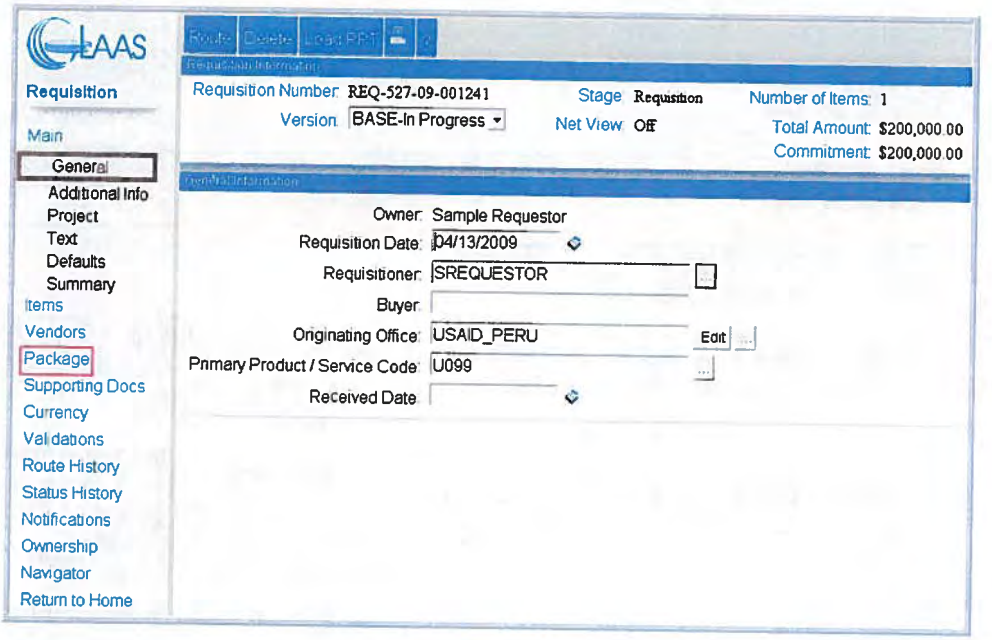


Figure 1: Main / General Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Open a GLAAS document (not shown).	
3.	Main / General	Click the **Package** link on the left-hand menu.	This user guide will display screen shots from a Requisition, but regardless of the document type, the function is the same.

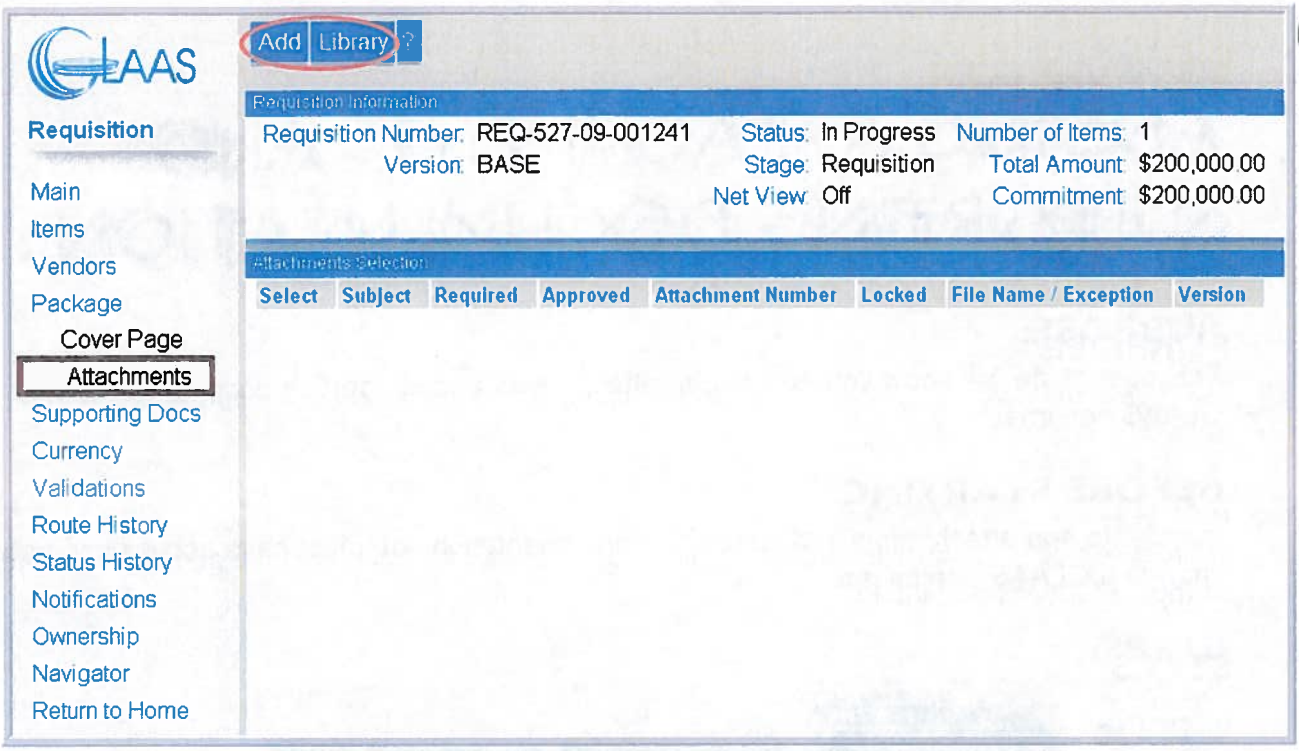


Figure 2: Package / Attachments Screen

Steps	Section	User Action	Guidance
4.	Package / Cover Page	Click the **Attachments** link on the left-hand menu (not shown).	
5.	Package / Attachments	Click the **Add** toolbar button to add a document from your PC or network. OR Click the **Library** toolbar button to add a document from the GLAAS Library (go to **Step 14**).	You can attach files to a GLAAS document as either **Attachments** or as **Supporting Docs**. The **Attachments** screen contains documents for external use that may be sent to the vendor. Example: "Statement of Work." The **Attachments** screen shows any attachments already in this document. You can add an Attachment from your PC or network, or from the GLAAS Library.

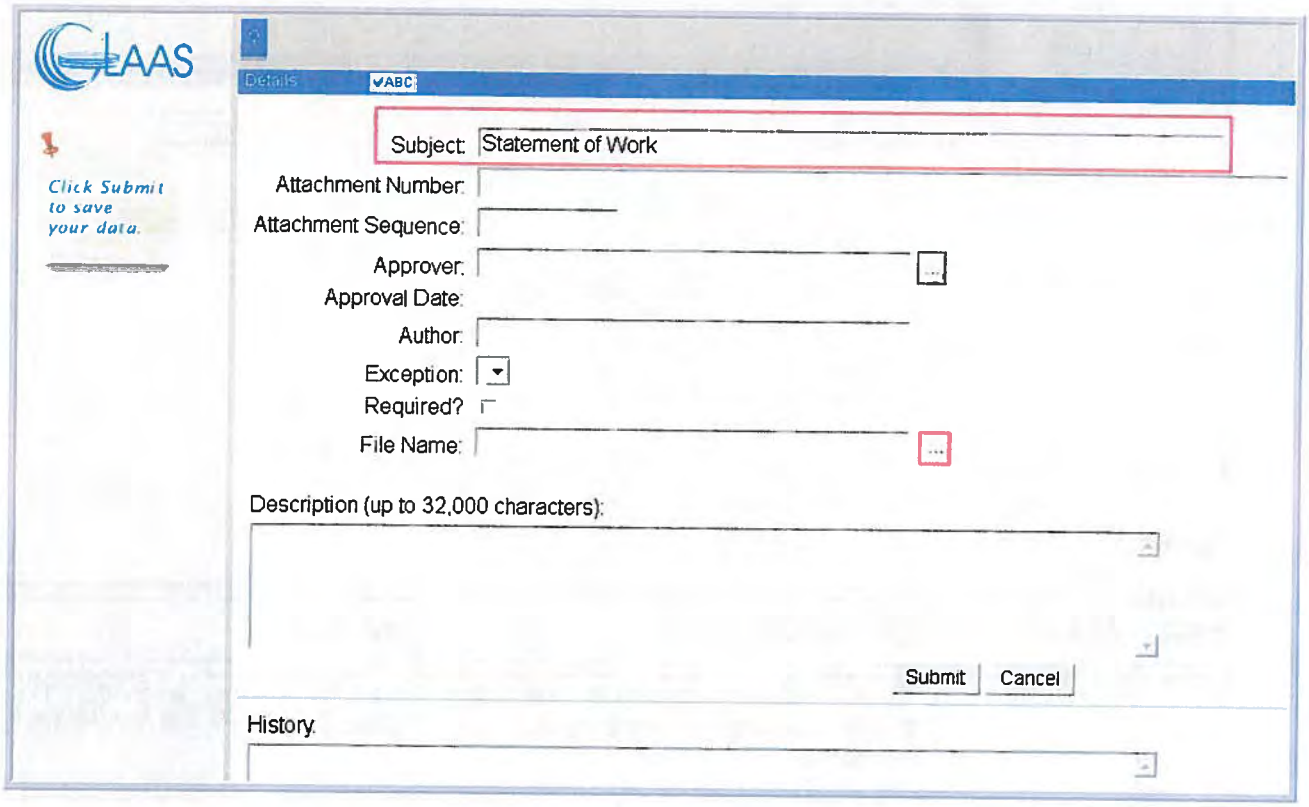


Figure 3: Details Screen

Steps	Section	User Action	Guidance
6.	Details	Complete the following Required (R) and/or Optional (O) fields: **Subject:** Enter a brief title for the attachment. — R **Attachment Number:** Enter an identification number, if applicable. — O **Attachment Sequence:** If you have several attachments, you can use this field to order them in the GLAAS document (e.g., "1" for first, "2" for second, and "3" for third). — O **Author:** Enter the document author's name. — O **Description:** Enter a more detailed description of the attachment. — O	USAID is not currently using the **Exception** field. GLAAS will auto-populate the **History** field.
7.	Details	Click the lookup button (...) next to **File Name** to search for a document from your computer.	

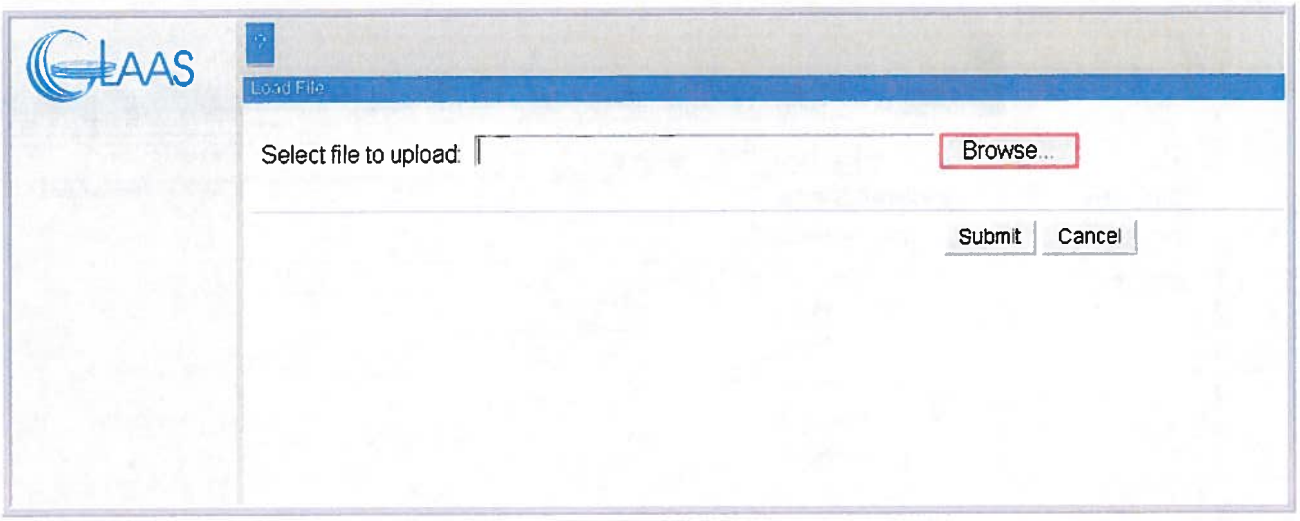


Figure 4: Load File Screen

Steps	Section	User Action	Guidance
8.	Load File	Click the **Browse** button to search for the file you want to upload to this document.	GLAAS will open a standard pop-up window allowing you to choose a file.

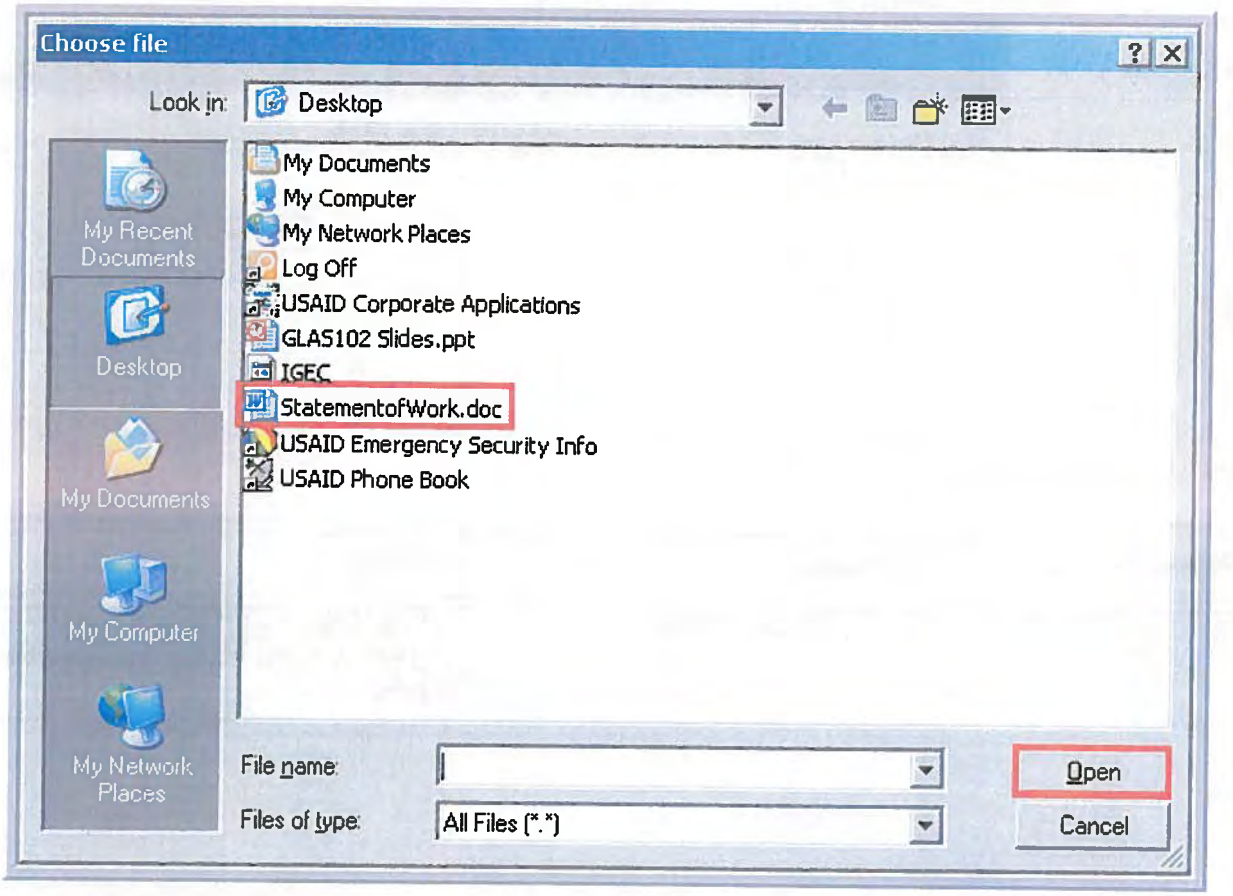


Figure 5: Choose File Screen

Steps	Section	User Action	Guidance
9.	Choose File	Browse through your PC or network folders to find the file you want to attach to this GLAAS document. When you find the document, select it and click the **Open** button.	

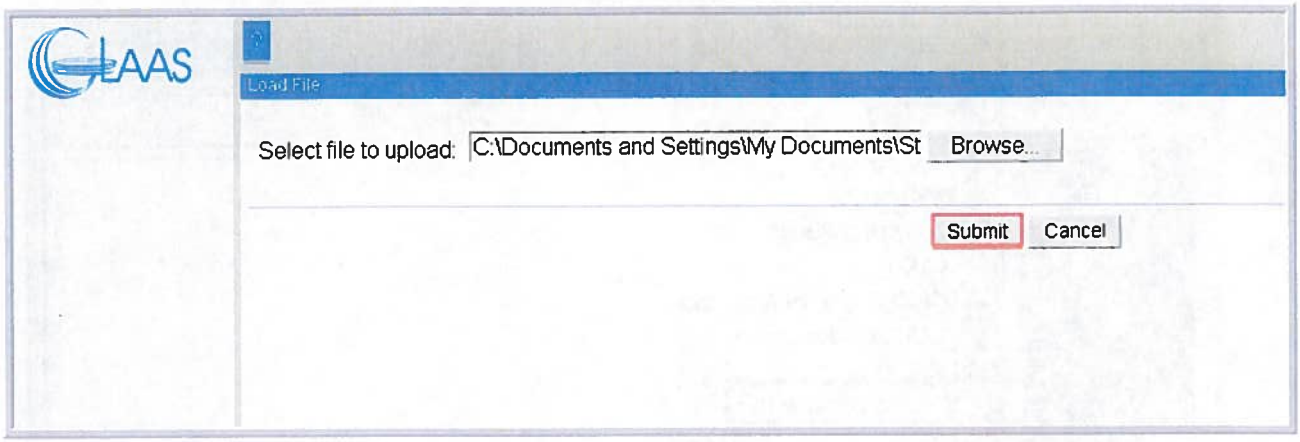


Figure 6: Load File Screen

Steps	Section	User Action	Guidance
10.	Load File	Click the **Submit** button.	The network path of your attachment appears in the **Select file to upload** field.

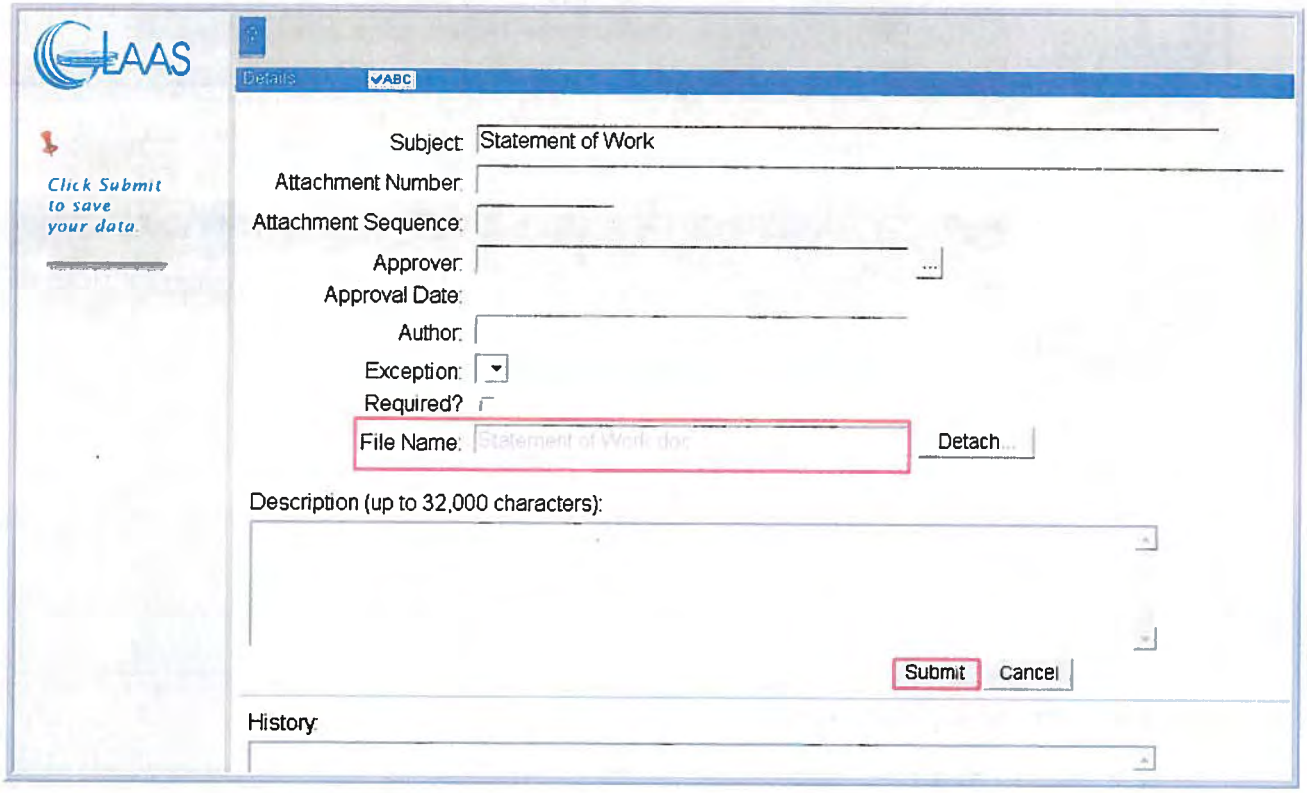


Figure 7: Details Screen

Steps	Section	User Action	Guidance
11.	Details	Click the **Submit** button.	The title of the document appears in the **File Name** field.

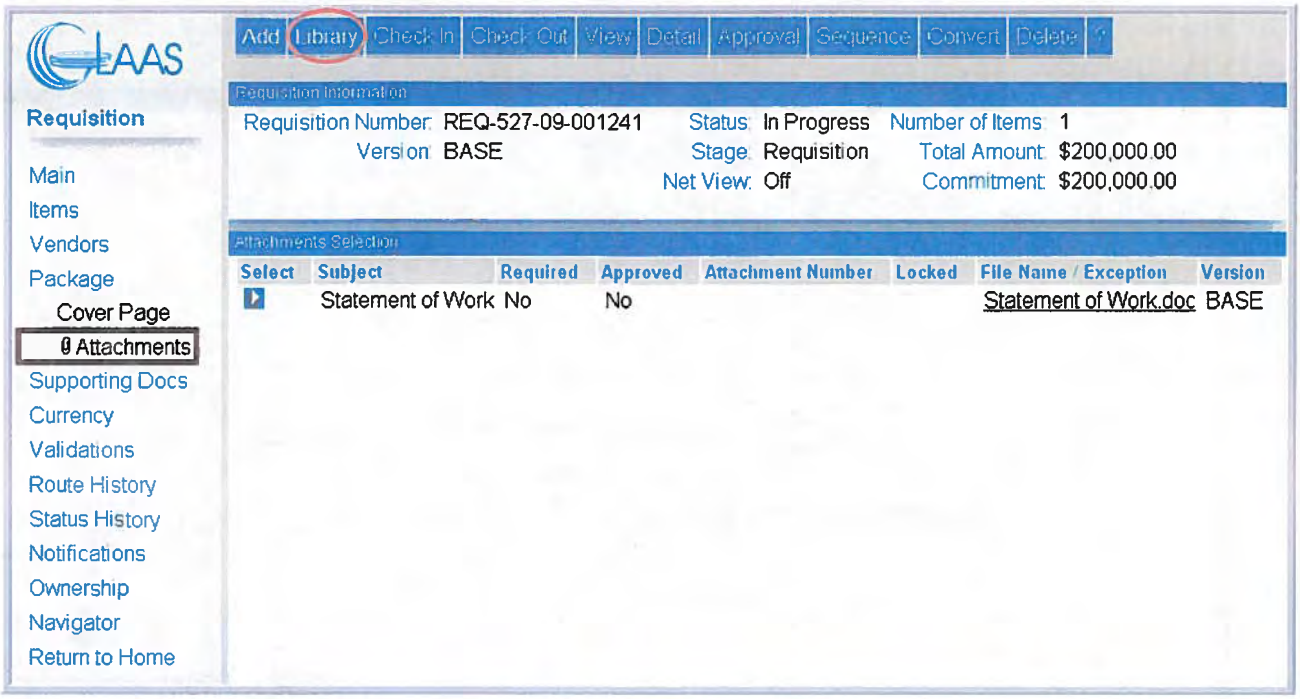


Figure 8: Package / Attachments Screen

Steps	Section	User Action	Guidance
12.	Package / Attachments	Click the **Library** toolbar button to add a document from the GLAAS Library.	The GLAAS Library contains commonly used procurement documents. Each site has a library that is maintained by its Site Administrator.

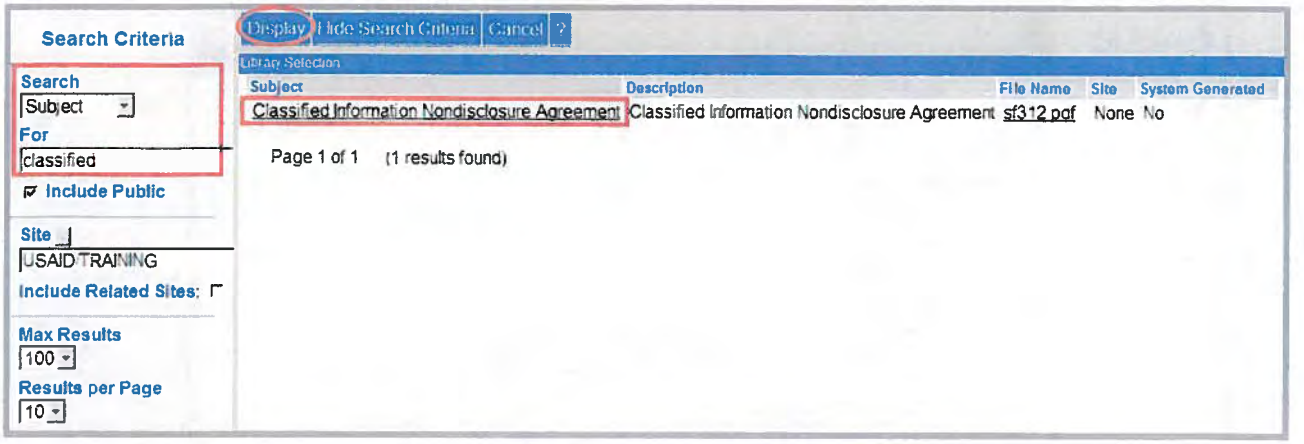


Figure 9: Library Selection Screen

Steps	Section	User Action	Guidance
13.	Library Selection	Complete the following fields: • **Search:** Defaults to "Subject." • **For:** Enter the document subject.	The **Library Selection** screen lists all of the documents in your site's GLAAS Library. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
14.	Library Selection	Click the **Display** toolbar button.	
15.	Library Selection	Click the **Subject** link.	

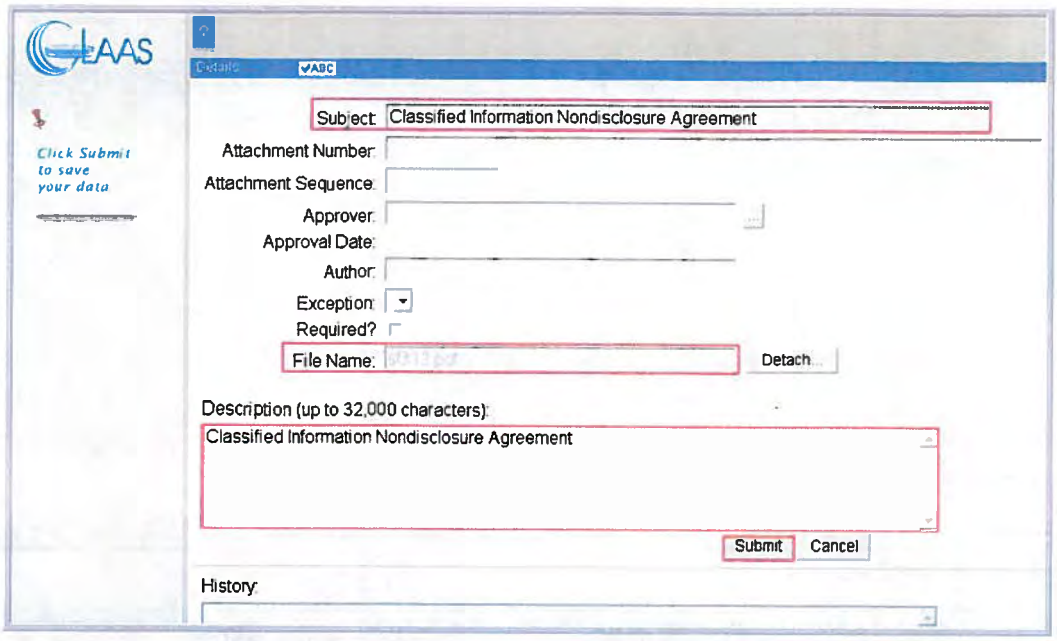


Figure 10: Details Screen

Steps	Section	User Action	Guidance
16.	Details	Add basic information about the attachment on this screen.	The **Subject** and **Description** fields will default from the Library. They can be changed if necessary. The title of the document appears in the **File Name** field.
17.	Details	Complete the following Required (R) and/or Optional (O) fields: **Subject:** Enter a brief title for the attachment. — R **Attachment Number:** Enter an identification number, if applicable. — O **Attachment Sequence:** If you have several attachments, you can use this field to order them in the GLAAS document (e.g., 1 for first, 2 for second, 3 for third). — O **Author:** Enter the document author's name. — O **Description:** Enter a more detailed description of the attachment. — O	USAID is not currently using the **Exception** field. GLAAS will auto-populate the **History** field.
18.	Details	Click the **Submit** button.	

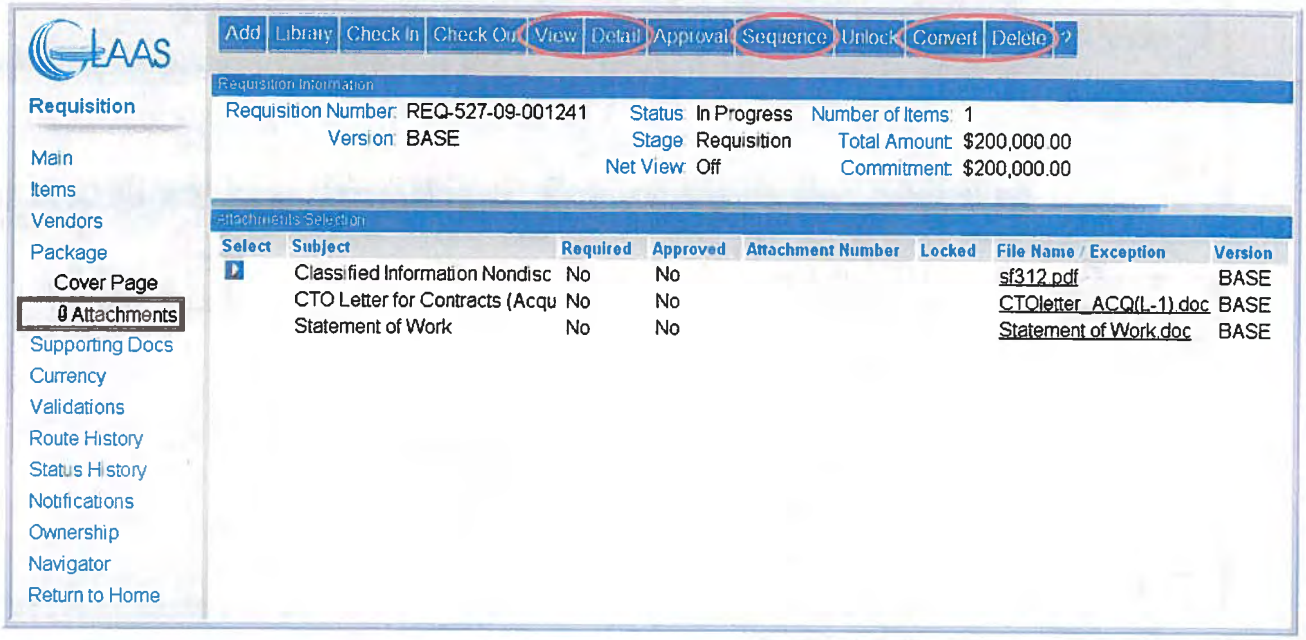


Figure 11: Package / Attachments Screen

Steps	Section	User Action	Guidance
19.	Package / Attachments	To work with existing attachments, **Select** an attachment and then: • Click the **View** toolbar button to open and view the attachment (not shown). • Click the **Detail** toolbar button to view and edit basic information about the attachment (i.e., the **Subject**, **Attachment Number**, and **Description** that you entered earlier) (not shown). • Click the **Sequence** toolbar button to move an attachment up or down in the package (not shown). • Click the **Convert** toolbar button to move the document from **Attachments** to **Supporting Docs** (not shown). • Click the **Delete** toolbar button to remove a document from the **Attachments** screen (not shown).	

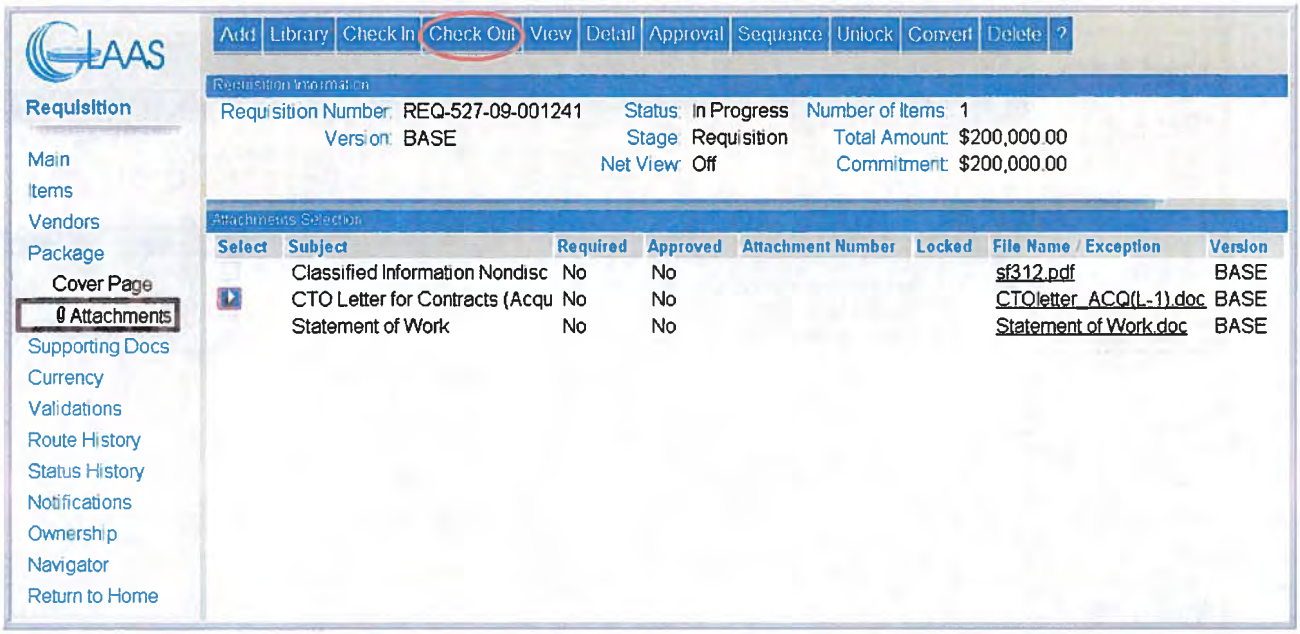


Figure 12: Package / Attachments Screen

Steps	Section	User Action	Guidance
20.	Attachments	To edit an attachment item, **Select** the document.	You can edit items after they have been attached to a GLAAS document. The **Check In/Check Out** procedure allows only one person to update an attachment at a time. When you **Check Out** an attachment, nobody will be able to release the GLAAS document until the attachment is checked back in.
21.	Attachments	Click the **Check Out** toolbar button.	

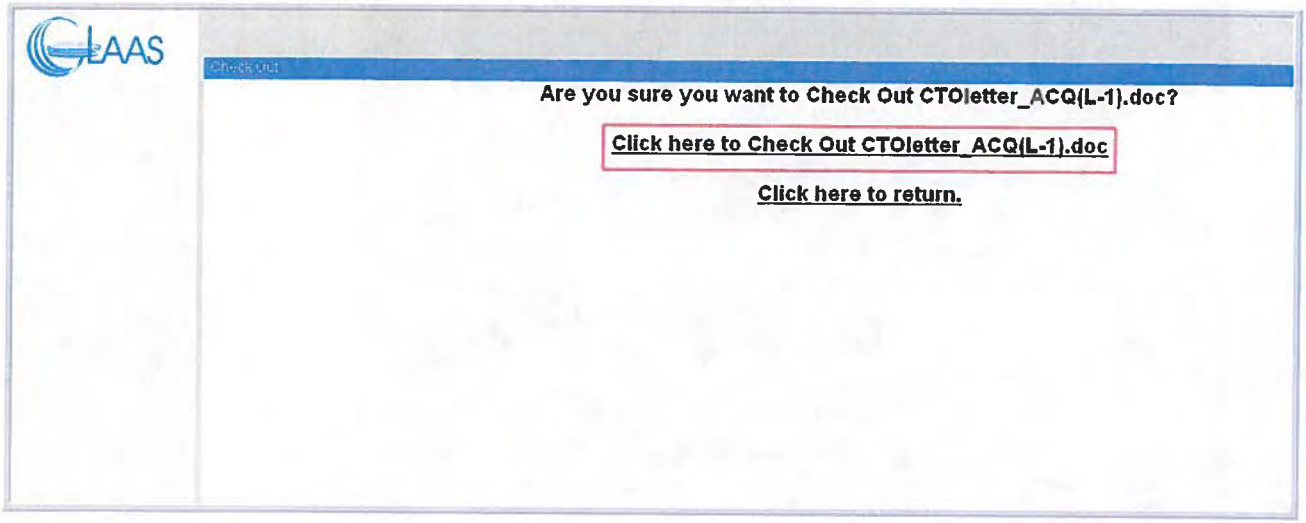


Figure 13: Check Out Screen

Steps	Section	User Action	Guidance
22.	Check Out	Click the **Click here to Check Out...** link to continue the check out procedure. OR Click the **Click here to return** link to cancel the check out procedure.	GLAAS asks you if you want to check out this attachment.

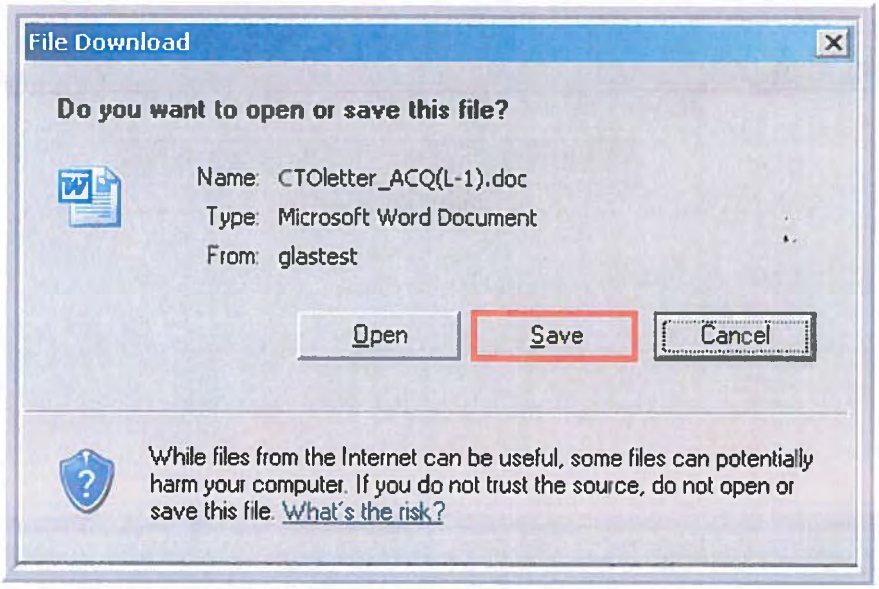


Figure 14: File Download Screen

Steps	Section	User Action	Guidance
23.	File Download	Click the **Save** button to select where on your computer you would like to save this file.	If you click the **Open** button, the system will automatically save a copy to a temporary folder on your computer. To check the document back into the system, you must know the location of the saved document.

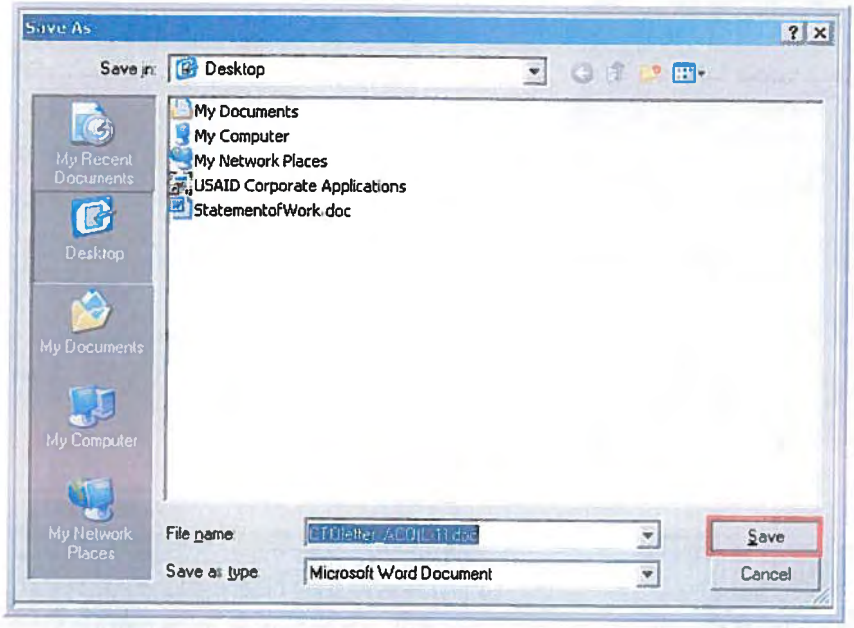


Figure 15: Save As Screen

Steps	Section	User Action	Guidance
24.	Save As	Select a location and click the **Save** button.	

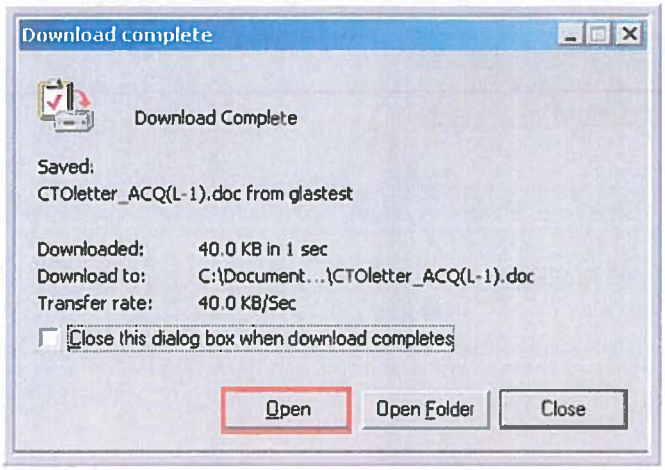


Figure 16: Download Complete Screen

Steps	Section	User Action	Guidance
25.	Download Complete	Click the **Open** button.	Once the download is complete, this window will appear. The appropriate software will open the file and will allow you to make any edits. Make sure to save your changes and close down that software (not shown).

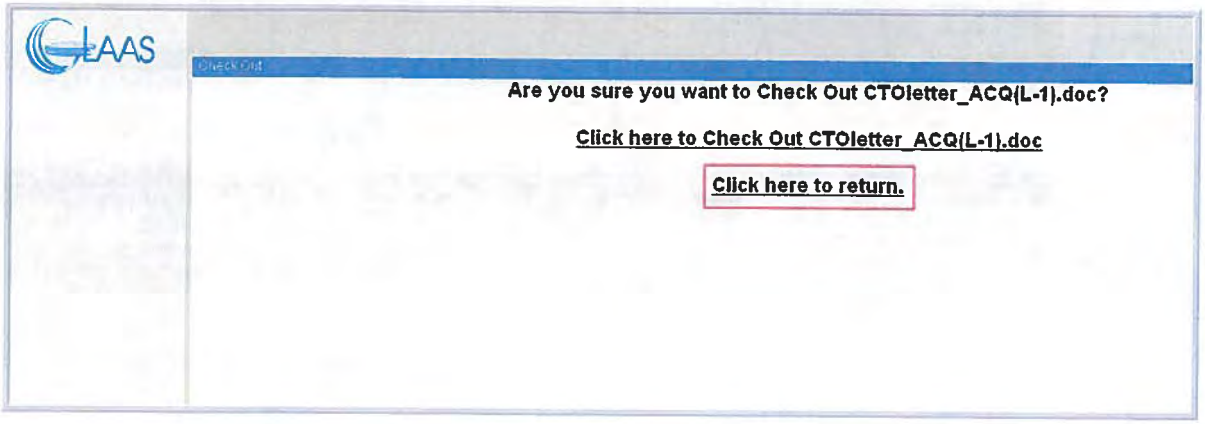


Figure 17: Check Out Screen

Steps	Section	User Action	Guidance
26.	Check Out	Click the **Click here to return** link.	

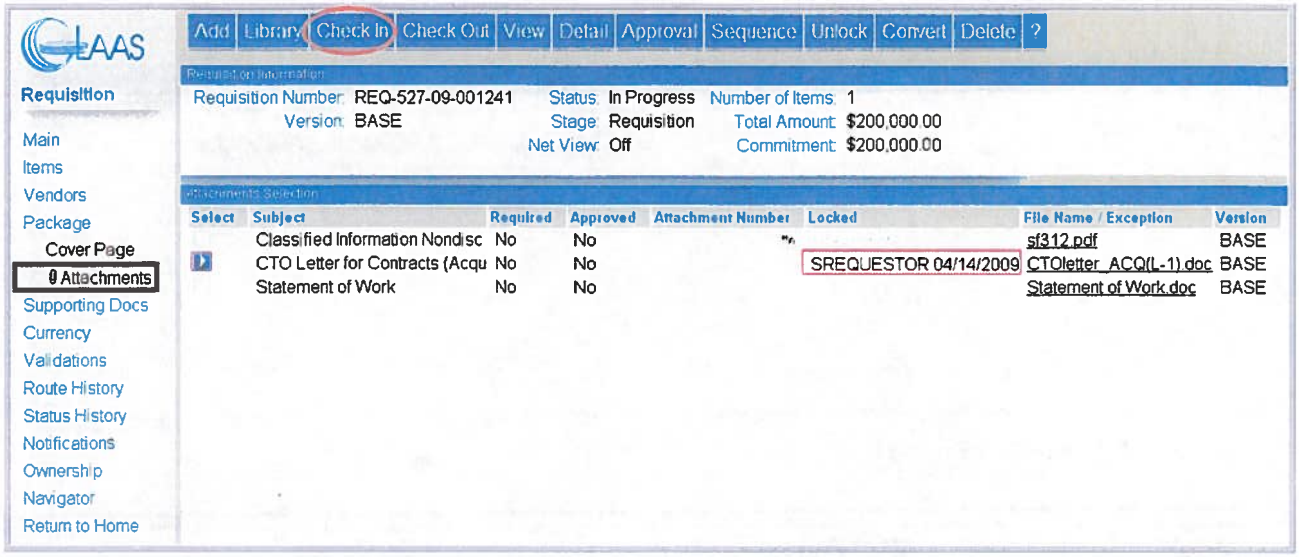


Figure 18: Package / Attachments Screen

Steps	Section	User Action	Guidance
27.	Package / Attachments	To check a document back into GLAAS, **Select** the attachment and then click the **Check In** toolbar button.	The **Attachments** screen now shows that the attachment is **Locked**. It also shows who locked it and when it was locked. After you revise the attachment on your PC, you can check it back into GLAAS.

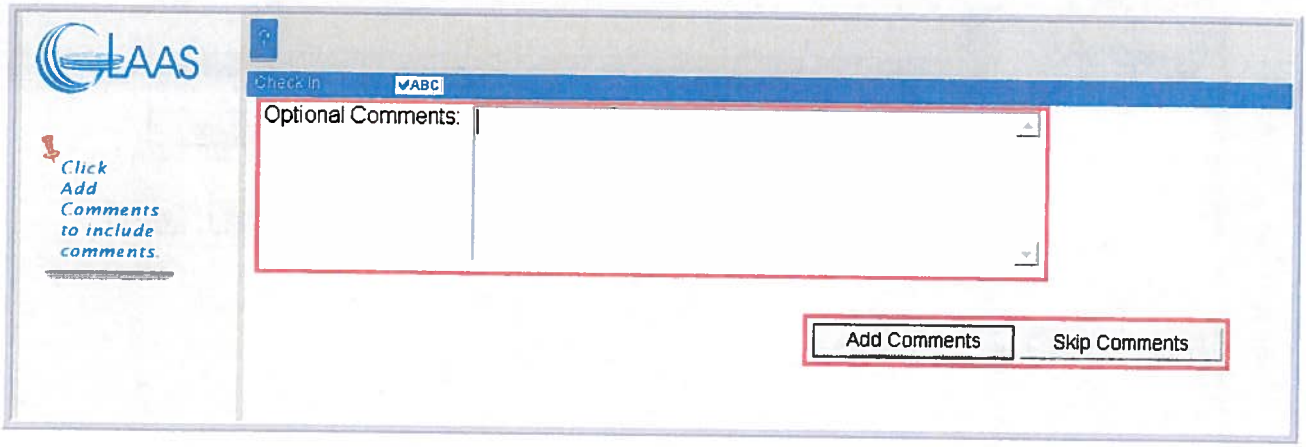


Figure 19: Check In Screen

Steps	Section	User Action	Guidance
28.	Check In	To include notes about the attachment, enter them in **Optional Comments** and click the **Add Comments** button. OR Click the **Skip Comments** button.	

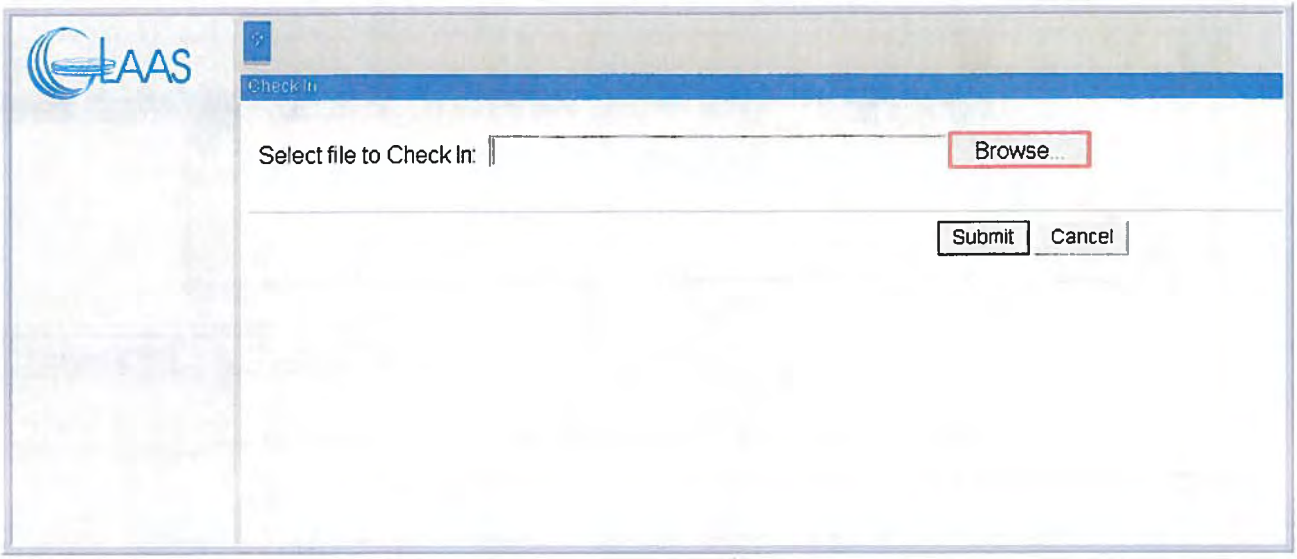


Figure 20: Check In Screen

Steps	Section	User Action	Guidance
29.	Check In	Click the **Browse** button to find the file.	Next, GLAAS prompts you for the location of the file you want to check back in.

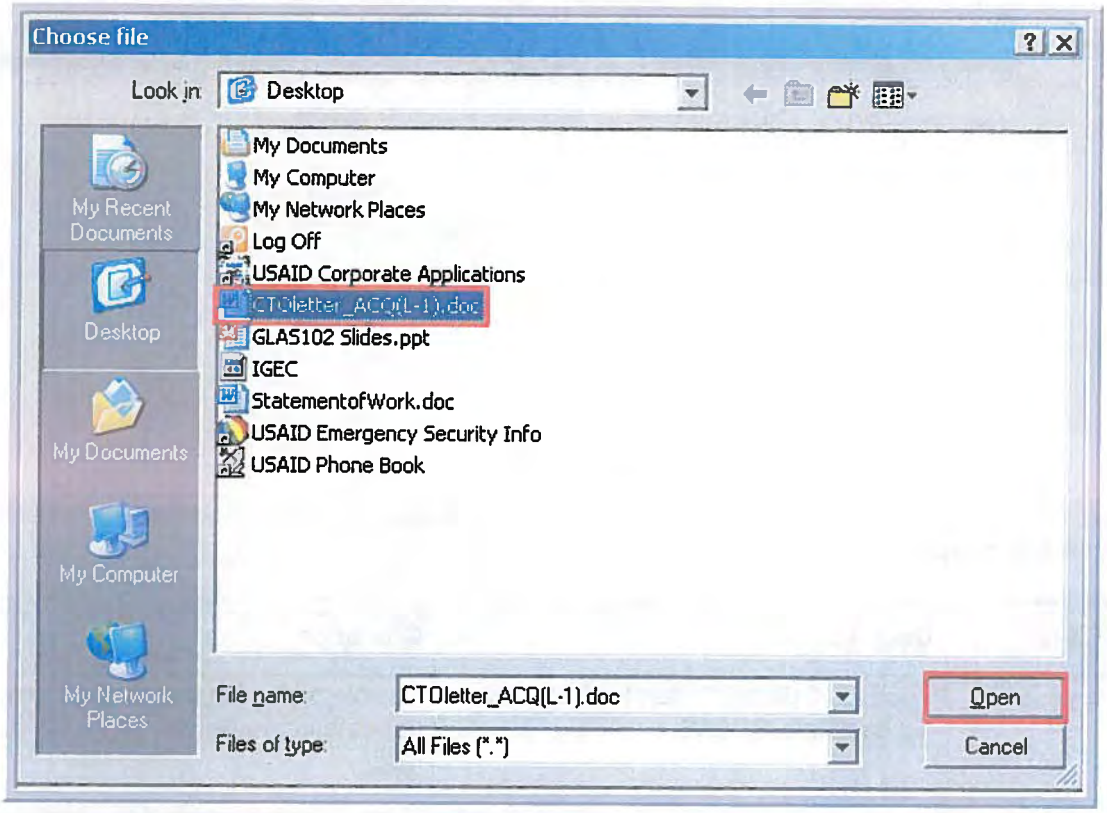


Figure 21: Choose File Screen

Steps	Section	User Action	Guidance
30.	Choose File	Use the **Choose file** pop-up window to find the file on your PC or network. Select the file and then click the **Open** button.	The file that you check in must have the same file name as the file that you checked out. If they are different, you will not be able to check the document back into GLAAS.

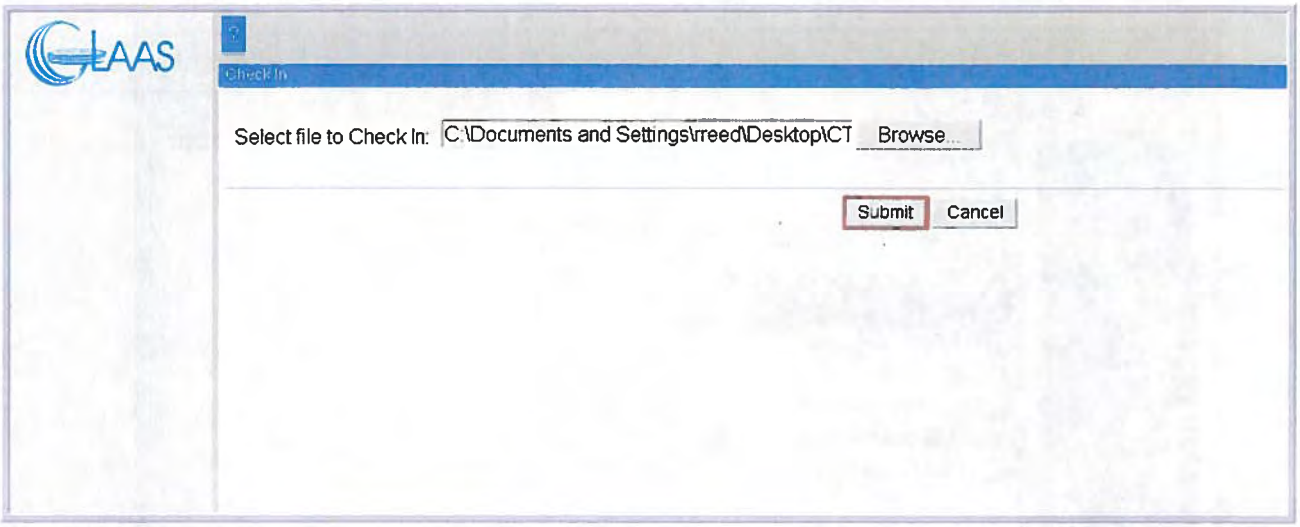


Figure 22: Check In Screen

Steps	Section	User Action	Guidance
31.	Check In	Click the **Submit** button to check this file back into GLAAS.	The file path of the revised attachment appears in the **Select file to Check In** field.

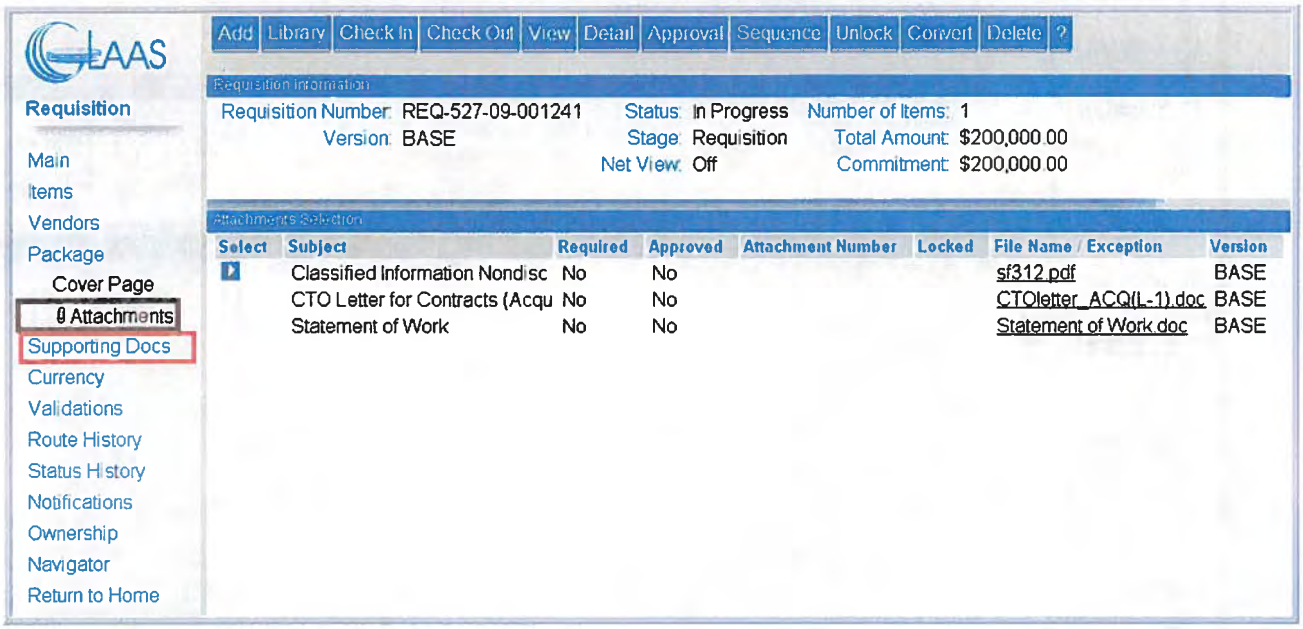


Figure 23: Package / Attachments Screen

Steps	Section	User Action	Guidance
32.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	The **Package / Attachments** screen shows that the file has been checked back into GLAAS and is no longer locked.

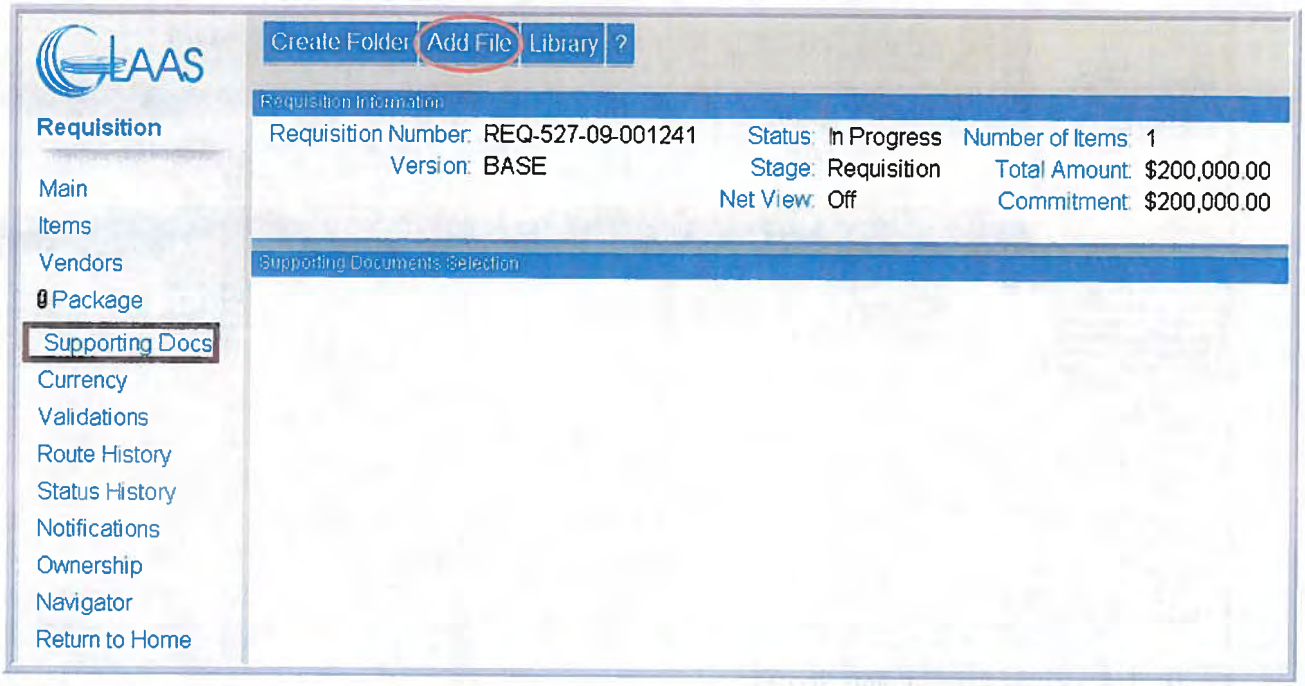


Figure 24: Supporting Docs Screen

Steps	Section	User Action	Guidance
33.	Supporting Docs	Click the **Add File** toolbar button.	Adding files to **Supporting Docs** works just like adding files as **Attachments** with few exceptions. The **Supporting Docs** screen contains documents for internal use that will not be sent to the vendor. Example: "Cost Analysis." Review the previous steps to learn the basic functionality of **Supporting Docs**. The documents found here under the **Library** are identical to the ones found on the **Attachments** screen.

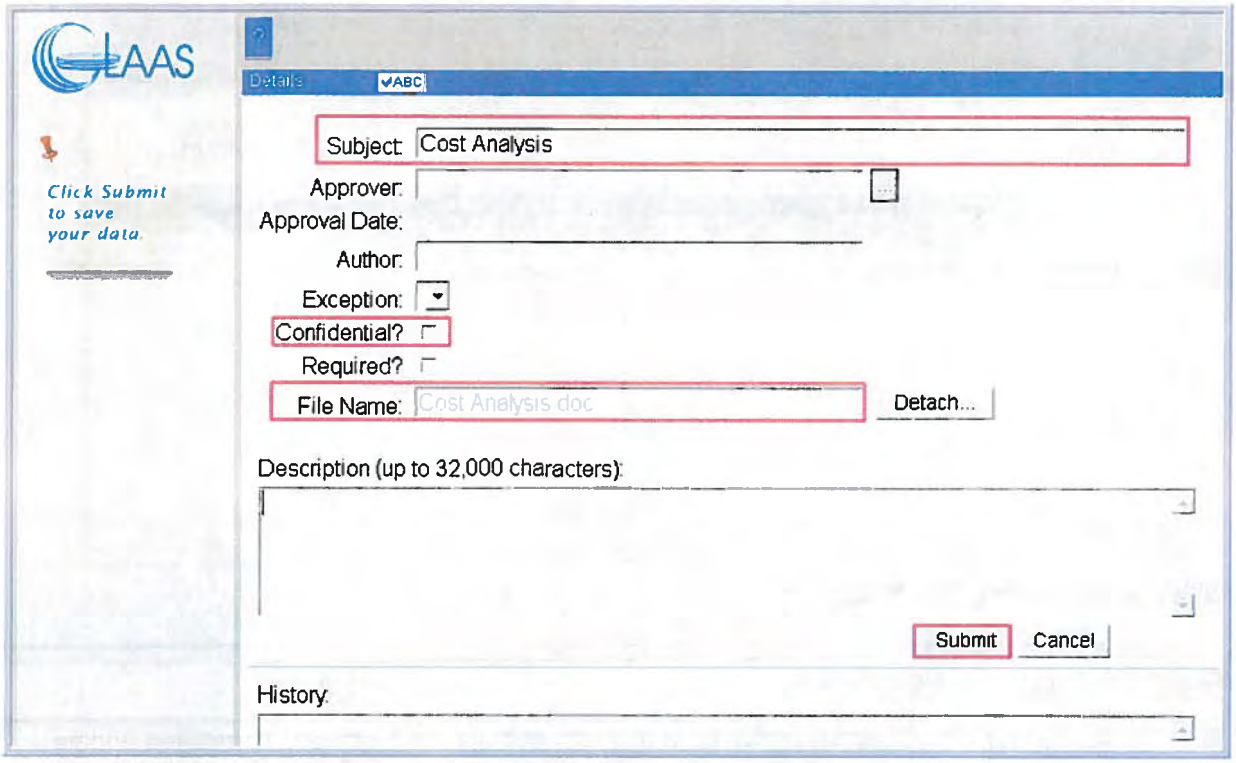


Figure 25: Details Screen

Steps	Section	User Action	Guidance
34.	Details	Complete the following Required (R) and/or Optional (O) fields: **Subject:** Enter a brief title for the attachment. — R **Approver:** Enter the user ID of the approver for this document. — O **Author:** Enter the document author's name. — O **Confidential:** Check this box if you want to limit the users who can view this supporting document. — O **Required:** Check this box if you want the system to require the above approver to review this attachment before release. — O **Description:** Enter a more detailed description of the supporting document. — O	USAID is not currently using the **Exception** field. If you use the **Confidential** selection box, only users with Full Access to the GLAAS document will be able to see the supporting document. Review **Steps 7-11** to upload a document from your PC.
35.	Details	Click the **Submit** button.	

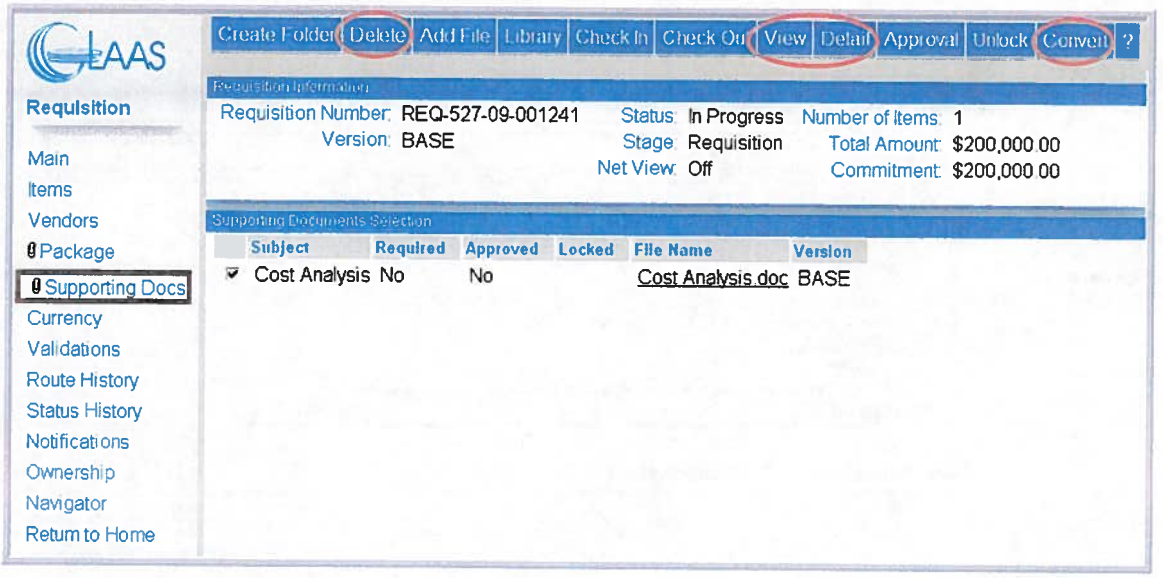


Figure 26: Supporting Docs Screen

Steps	Section	User Action	Guidance
36.	Supporting Docs	Review **Steps 13-19** to add a document from the **Library**. Review **Steps 22-32** to **Check Out** a supporting document. To work with existing supporting documents, **Select** a document and then: • Click the **View** toolbar button to open and view the attachment (not shown). • Click the **Detail** toolbar button to view and edit basic information about the attachment (i.e., the **Subject**, **Attachment Number**, and **Description** that you entered earlier) (not shown). • Click the **Convert** toolbar button to move the document from **Supporting Docs** to **Attachments** (not shown). • Click the **Delete** toolbar button to remove a document from the **Supporting Docs** screen (not shown).	You have completed adding attachments and supporting documentation.
37.	Supporting Docs	Continue working in the GLAAS document, or click the **Return to Home** link on the left-hand menu to return to the GLAAS **Welcome** screen (not shown).	

GLAAS 102 USER GUIDE:

CREATING A VENDOR LIST AND VENDOR RESPONSES

PURPOSE:

This user guide will show you how to add a Vendor List to a GLAAS Solicitation and update the list with Vendor Responses.

BEFORE STARTING:

1. In order to add or update a Vendor List in a Solicitation, you must be an A&A Specialist or a Contracting Officer.
2. In order to add Vendor Responses in a Solicitation, you must be an A&A Specialist or a Contracting Officer.
3. A GLAAS Solicitation must exist and the status of the Solicitation should be "In Progress" or "Released."

STEPS:

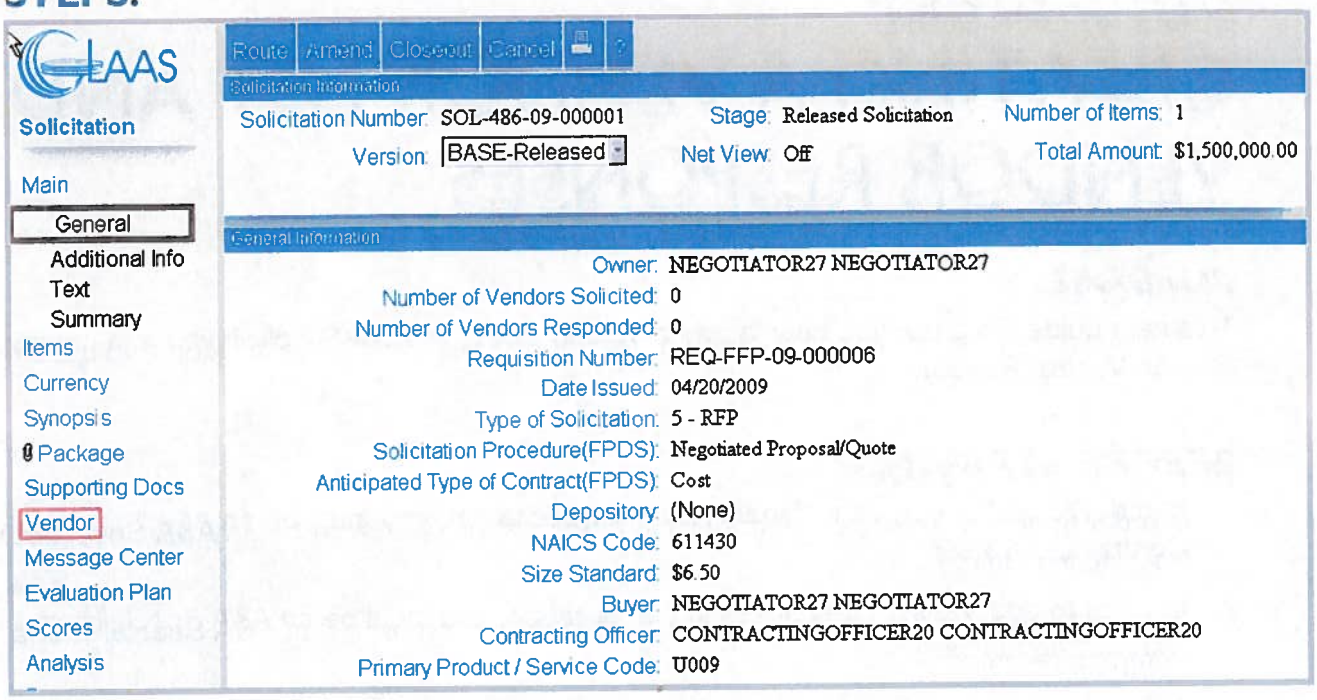


Figure 1: Main / General Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS and find the existing Solicitation needed (not shown).	
2.	Main / General	Click the **Vendor** link on the left-hand menu.	

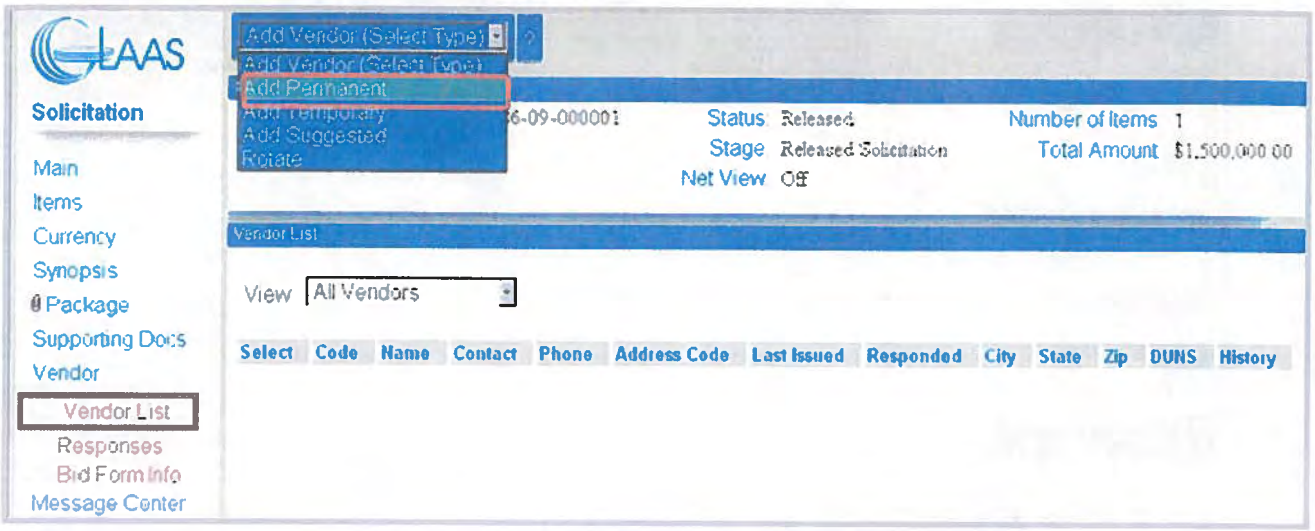


Figure 2: Vendor / Vendor List Screen

Steps	Section	User Action	Guidance
3.	Bidder's List	Click the **Add Vendor (Select Type)** toolbar button. Select "Add Permanent" from the dropdown list.	Use the Bidders List when you know in advance whom you will be soliciting. "Add Permanent" refers to vendors that already exist in Phoenix and can be used on Awards. "Add Temporary" refers to vendors in GLAAS that must also be created in the financial system, Phoenix, before they can be used on Awards. "Add Suggested" refers to vendors that come over from a Requisition and can be either permanent or temporary vendors. USAID is not currently using the **Rotate** option.

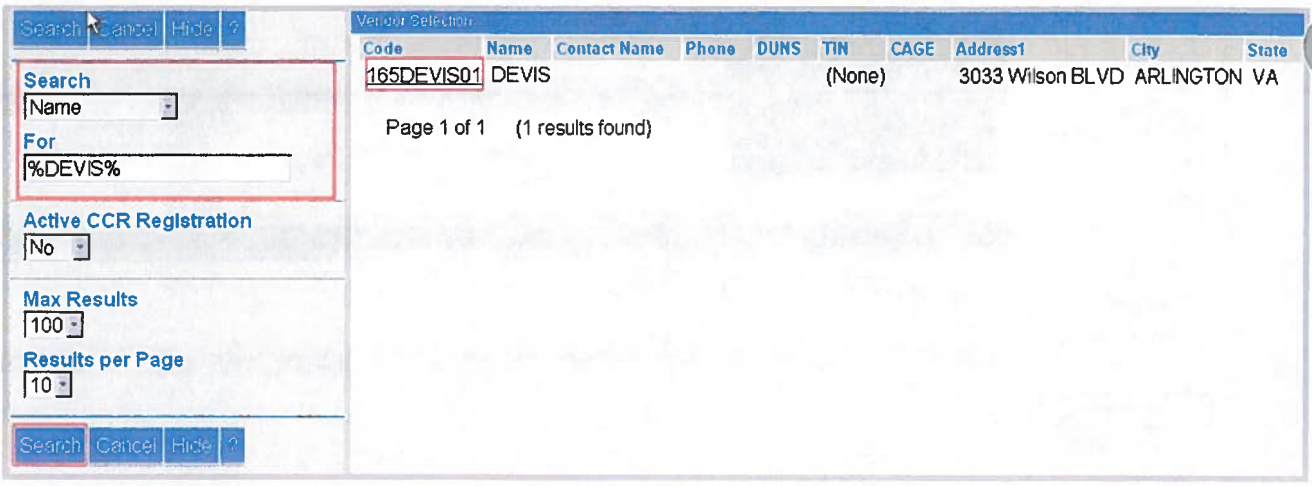


Figure 3: Vendor Selection Screen

Steps	Section	User Action	Guidance
4.	Vendor Selection	Complete the following fields: • **Search:** GLAAS allows you to search by: – **Name:** Phoenix vendor name. – **Code:** Phoenix vendor code. – **DUNS:** Dun & Bradstreet number (CCR vendors only). • **For:** Enter the value you are searching for.	Use the **Vendor Selection** screen to search for a vendor to add to the Solicitation. When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name.
5.	Vendor Selection	Click the **Search** button.	
6.	Vendor Selection	Click the vendor **Code** link to select a vendor.	
7.	Vendor Selection	Repeat **Steps 4-6** until you have finished adding the vendors.	

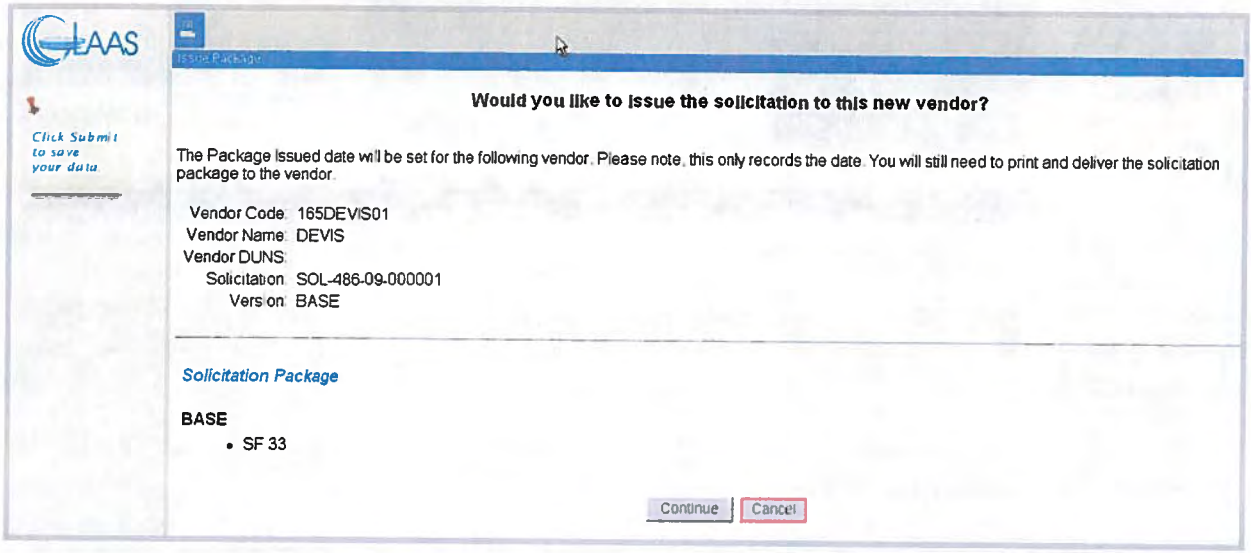


Figure 4: Issue Package Screen

Steps	Section	User Action	Guidance
8.	Issue Package	Click the **Cancel** button so the Package Issued date will NOT be set for the vendor.	USAID is not currently using the **Issue Package** functionality of GLAAS.

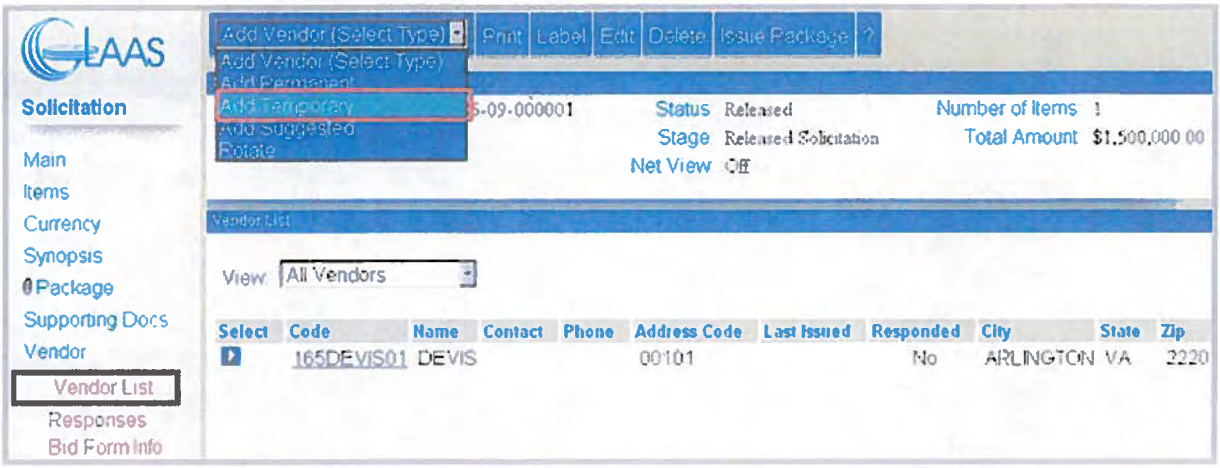


Figure 5: Vendor / Vendor List Screen

Steps	Section	User Action	Guidance
9.	Vendor / Vendor List	To add a Temporary Vendor, click the **Add Vendor (Select Type)** toolbar button and select "Add Temporary."	Temporary Vendors can be used on Solicitations, but Awards can only be issued to Permanent Vendors. If you think you may use a Temporary Vendor again or on an Award, follow the Phoenix process for adding a new vendor. The new Phoenix vendor will become a GLAAS Permanent Vendor.

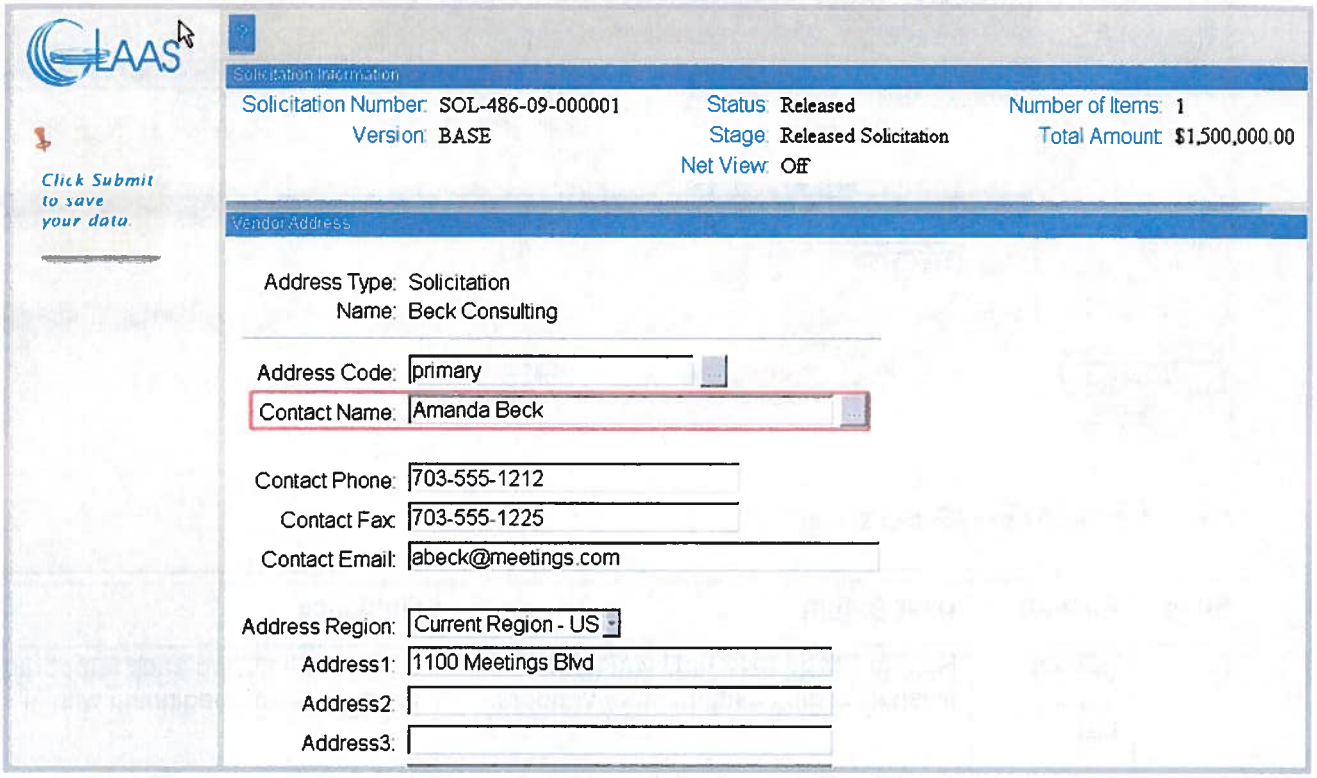


Figure 6: Temporary Vendor Screen

Steps	Section	User Action	Guidance
10.	Temporary Vendor	Type the **Contact Name** of the Vendor.	The Vendor **Contact Name** is the only Required field. The system will not require any additional information, but you should enter as much information as possible. USAID is not currently using the **Contact Name** lookup button (...).
11.	Temporary Vendor	Click the **Submit** button (not shown).	
12.	Issue Package	Click the **Cancel** button so the Package Issued date will NOT be set for the vendor (not shown).	USAID is not currently using the **Issue Package** functionality of GLAAS.

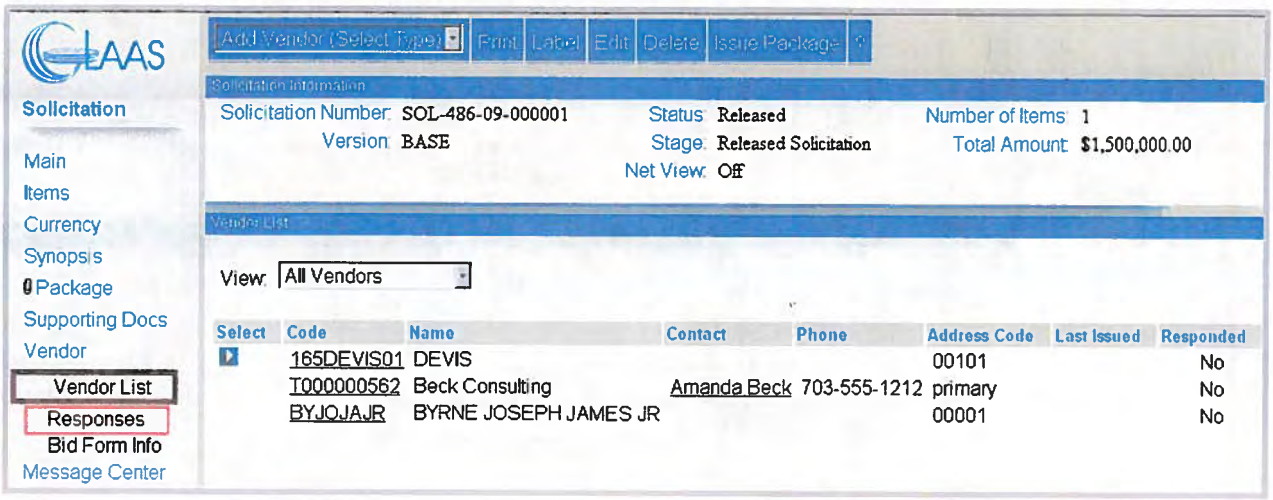


Figure 7: Vendor / Vendor List Screen

Steps	Section	User Action	Guidance
13.	Vendor / Vendor List	Repeat **Steps 9-12** until you have finished adding all temporary vendors.	GLAAS will assign each temporary vendor a **Code** beginning with "T."
14.	Vendor / Vendor List	Click the **Responses** link on the left-hand menu.	GLAAS will save the Solicitation with the Vendor List for you.

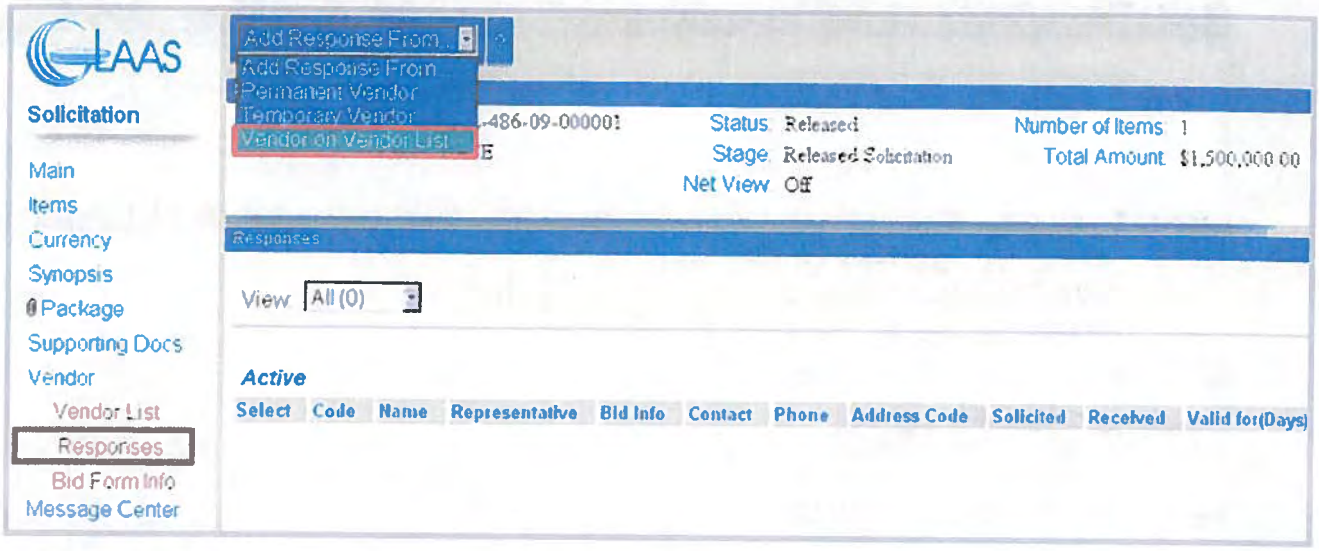


Figure 8: Vendor / Responses Screen

Steps	Section	User Action	Guidance
15.	Vendor / Responses	To add a Vendor to Responses, click the **Add Response From** toolbar button and select "Vendor on Vendor List."	Update the **Vendor List** with responses as they arrive. When selecting "Vendor on Vendor List," it will bring selected vendors from the **Vendor List** into the **Responses**. If you add a vendor to **Responses**, the system will automatically add them to the **Vendor List**.

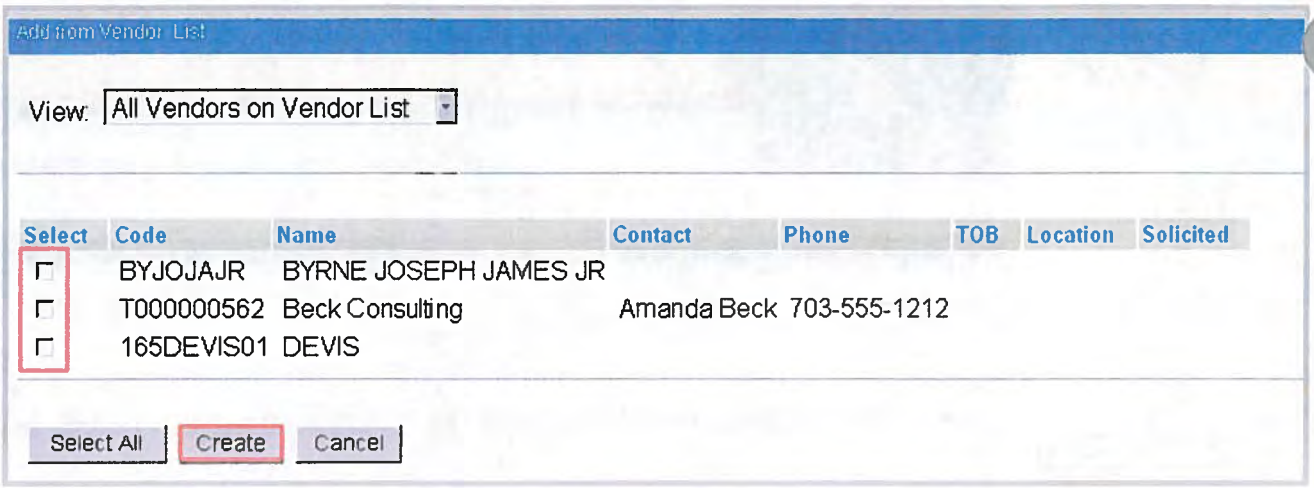


Figure 9: Add from Vendor List Screen

Steps	Section	User Action	Guidance
16.	Add from Vendor List	Click the **Select All** button to pull all the vendors from the **Vendor List**. OR **Select** individual vendors from the **Vendor List**. Click the **Create** button.	

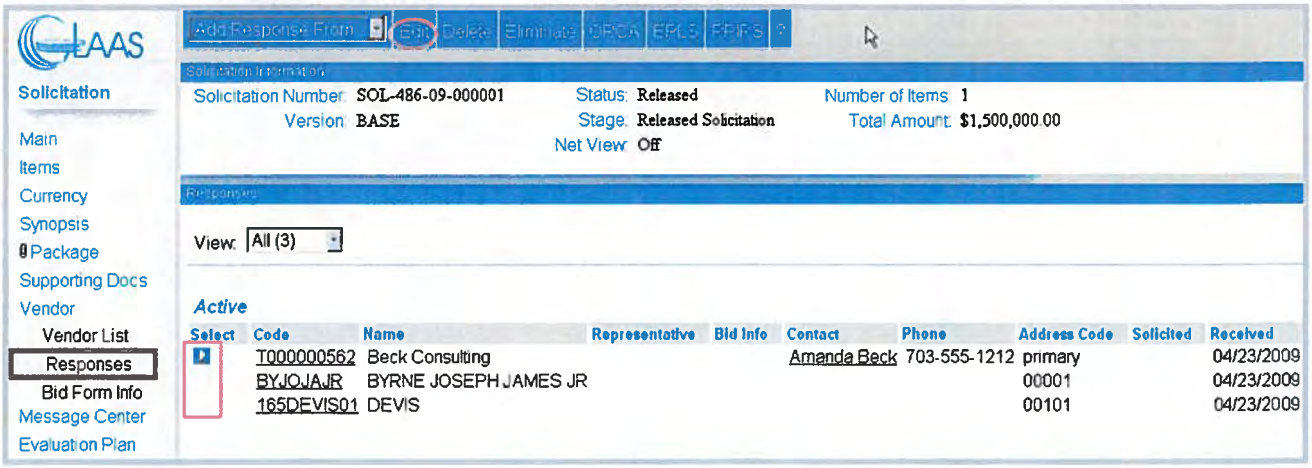


Figure 10: Vendor Responses Screen

Steps	Section	User Action	Guidance
17.	Vendor / Responses	**Select** a vendor and then click the **Edit** button to enter details about a vendor's response.	Use the **Responses** screen to enter bids from vendors who have responded to the Solicitation.

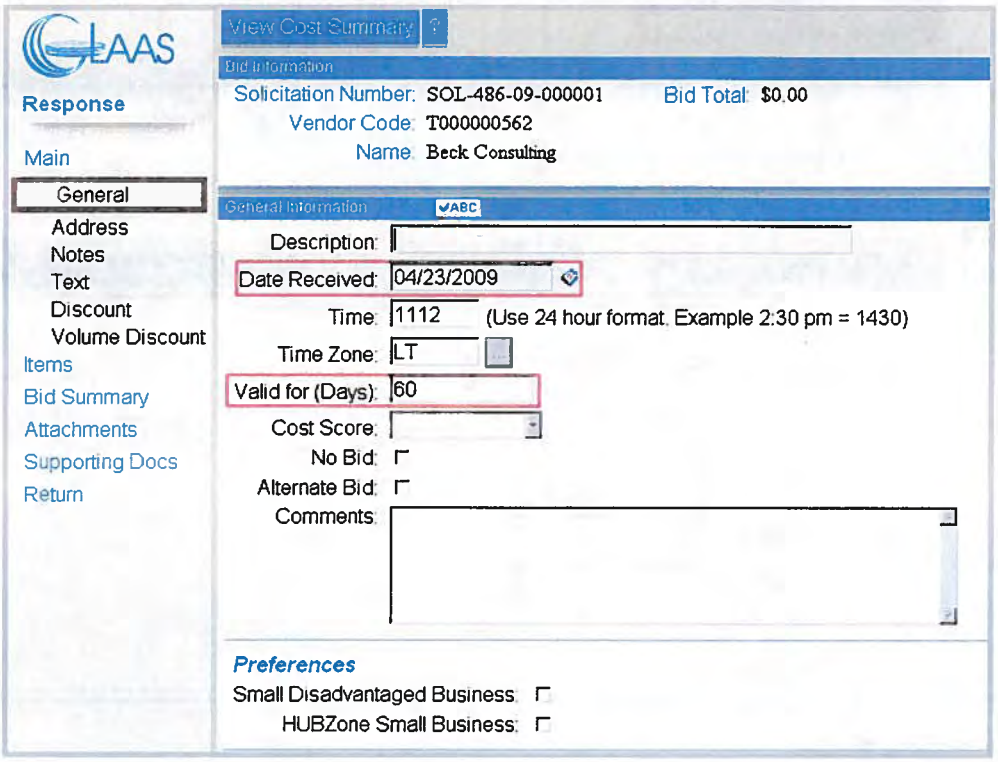


Figure 11: Response / General Screen

Steps	Section	User Action	Guidance
18.	Response / Main / General	Complete the following Required (R) and as needed, Optional (O) fields: **Description:** Enter a brief description of the bid. — O **Date Received / Time / Time Zone:** GLAAS defaults to the Date, Time and Time Zone when you added the vendor to Responses. This can be updated. — R **Valid for (Days):** This defaults to 60, but can be updated. — R **No Bid:** Select the checkbox, if the vendor declined to bid. — O **Alternate Bid:** Select the checkbox, if the vendor submitted an alternate bid. — O **Comments:** Enter bid comments. — O **Small Disadvantaged Business:** Check the box, if applicable. — O **HUBZone Small Business:** Check the box, if applicable. — O	You can update other **Response / Main** sections using the left-hand menu, but it is optional: • **Address:** Update the Vendor's address. • **Notes:** Add brief notes about the response. • **Text:** Use this field to document any information involving interactions with the vendor. • **Discount** and **Volume Discount:** Enter discount terms (if any) offered by the vendor.

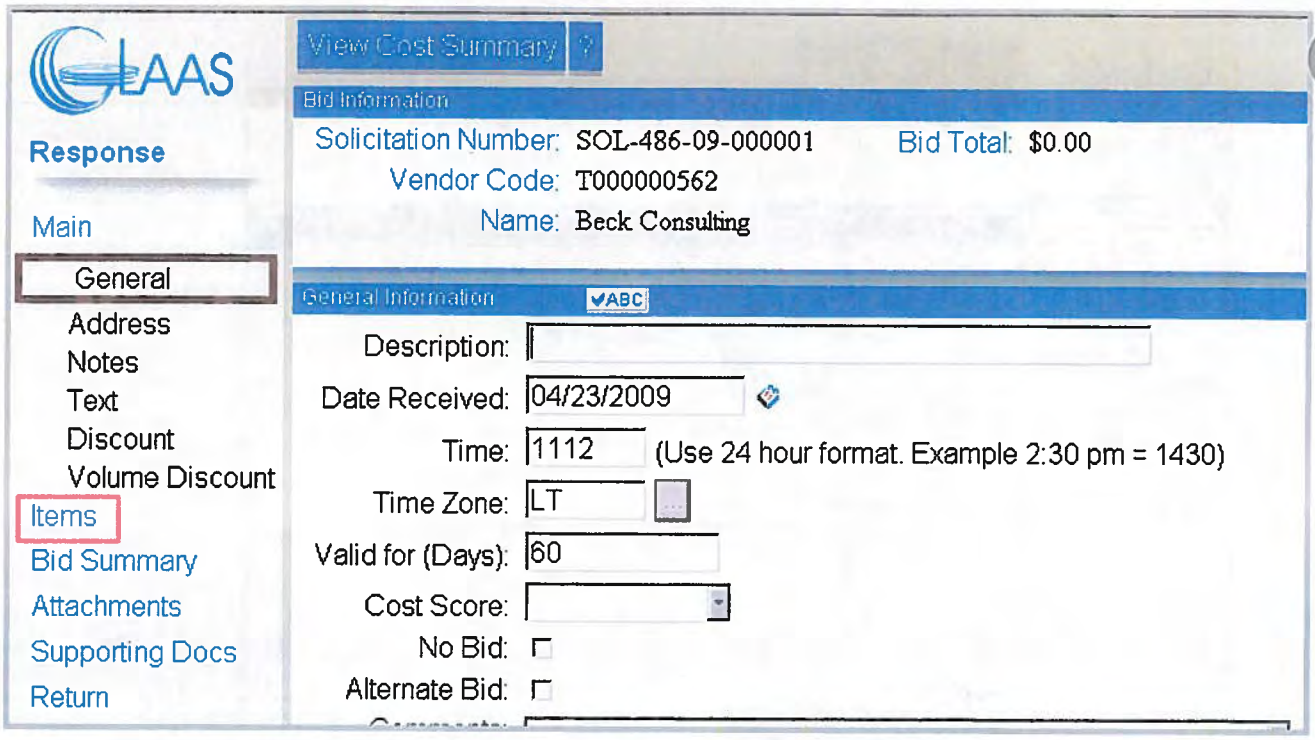


Figure 12: Response / General Screen

Steps	Section	User Action	Guidance
19.	Response / Main / General	Click the **Items** link on the left-hand menu.	You can update more of the Vendor Bid Information using the left-hand menu, but it is optional. **Bid Summary:** Displays a list of items and the bid amounts that have been received. **Attachments** and **Supporting Docs:** Allows you to attach documents to the current bid from either the Library or your computer.

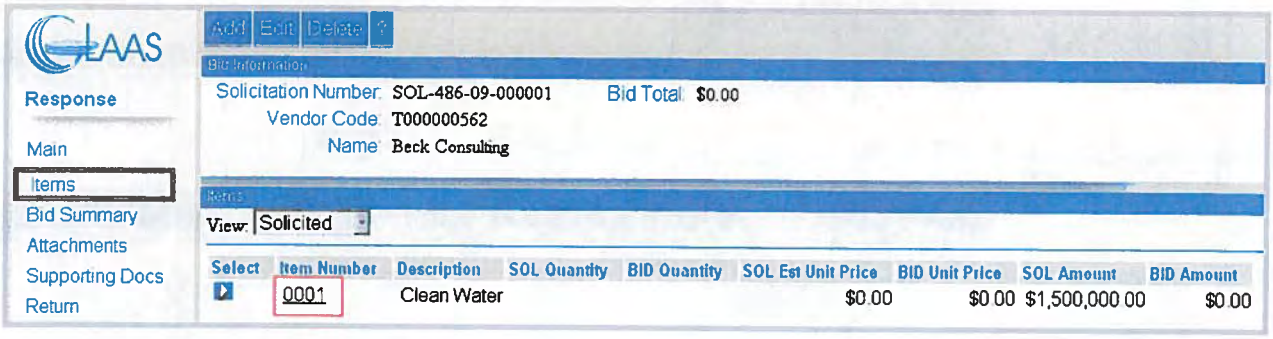


Figure 13: Response / Items Screen

Steps	Section	User Action	Guidance
20.	Response / Items	To edit an item, click the **Item Number** link.	The **Items** screen displays all of the Solicitation line items.

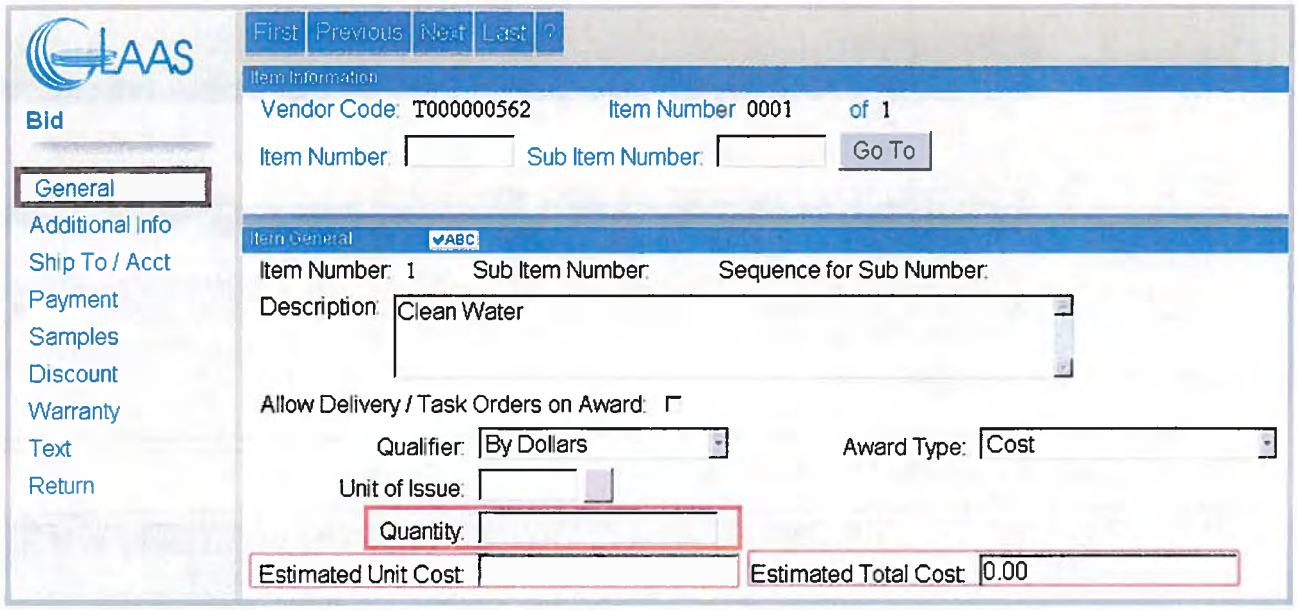


Figure 14: Bid / General Screen

Steps	Section	User Action	Guidance
21.	Bid Items / General	For goods, update the **Quantity** and **Estimated Unit Cost** fields. For services, update the **Estimated Total Cost** field.	Use this screen to enter the vendor's offer for this particular line item. The following fields will be pre-populated based on the Requisition or the system defaults: • **Item Number** • **Description** • **Qualifier** • **Award Type** Use the **First**, **Previous**, **Next**, and **Last** toolbar buttons to enter in additional bids for this vendor, if there are multiple line items.

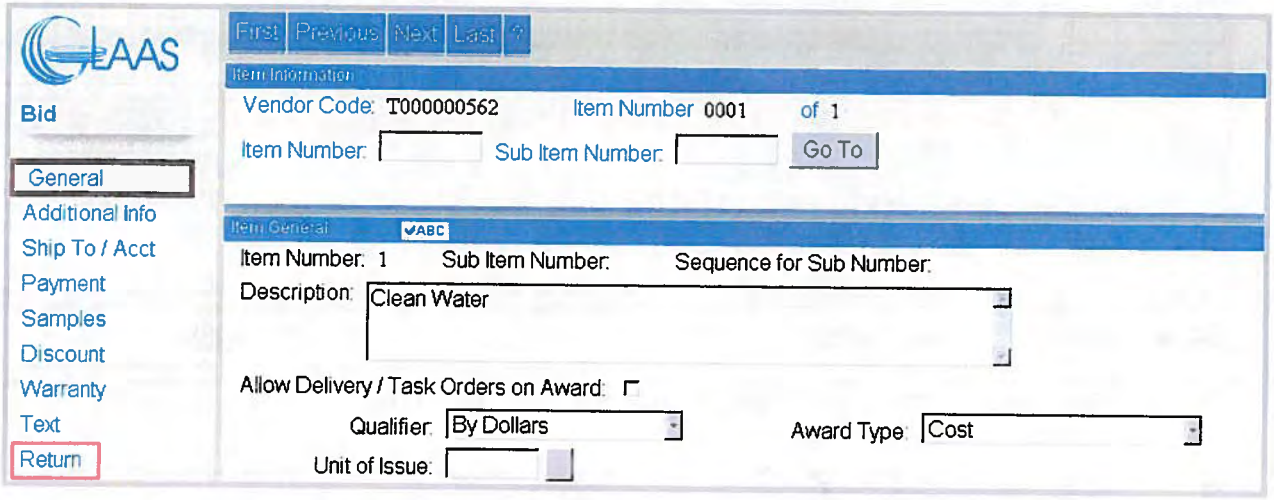


Figure 15: Bid / General Screen

Steps	Section	User Action	Guidance
22.	Bid Item / General	Click the **Return** link on the left-hand menu.	You can update more of the Vendor Bid Item using the left-hand menu, but it is optional: • **Additional Info:** Indicate if this line item is accountable property or if this is an optional line item. • **Ship To / Acct:** Displays the Shipping and Accounting information that came over from the Requisition. • **Payment:** Enter any payment terms specified by the vendor for this particular line item. • **Samples:** Maintain the information on receipt and inspection of samples. • **Discount:** Enter any discount terms specified by the vendor for this line item. • **Text:** Add additional text from the vendor. USAID is not currently using the **Warranty** link on the left-hand menu.

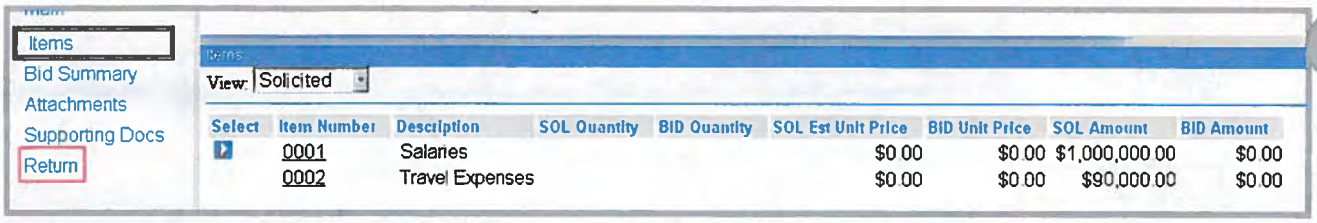


Figure 16: Response / Items Screen

Steps	Section	User Action	Guidance
23.	Response / Items	Repeat **Steps 20 - 22** until all Vendor Bid Items are updated.	
24.	Response / Items	Click the **Return** link on the left-hand menu.	

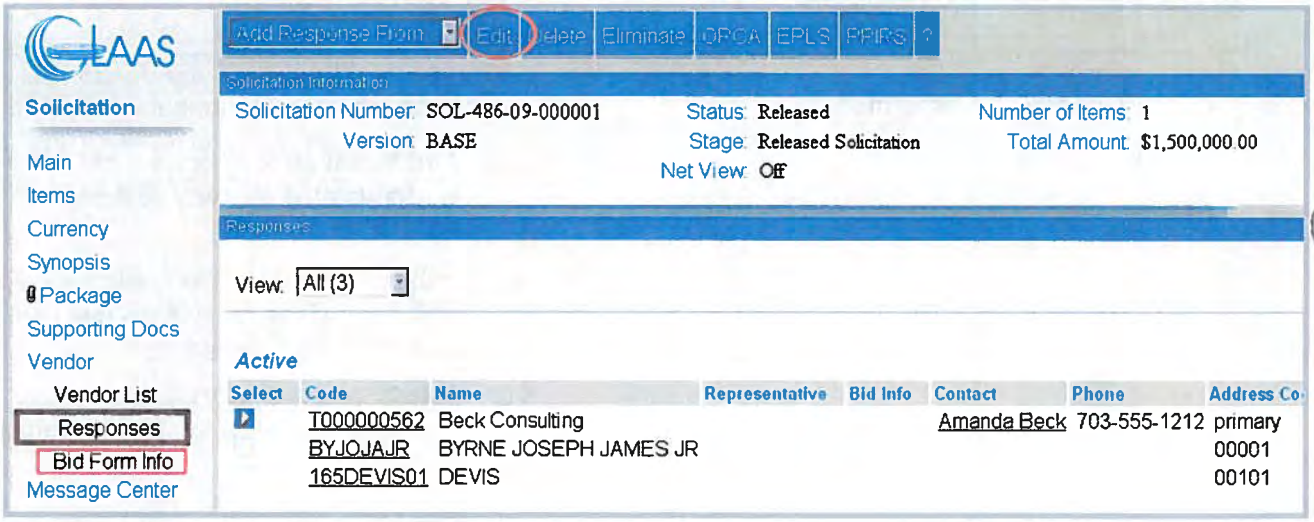


Figure 17: Vendor / Responses Screen

Steps	Section	User Action	Guidance
25.	Vendor / Responses	For any additional Vendors, **Select** the next vendor and click the **Edit** toolbar button. Repeat **Steps 18-24**.	
26.	Vendor / Responses	Click the **Bid Form Info** link on the left-hand menu.	

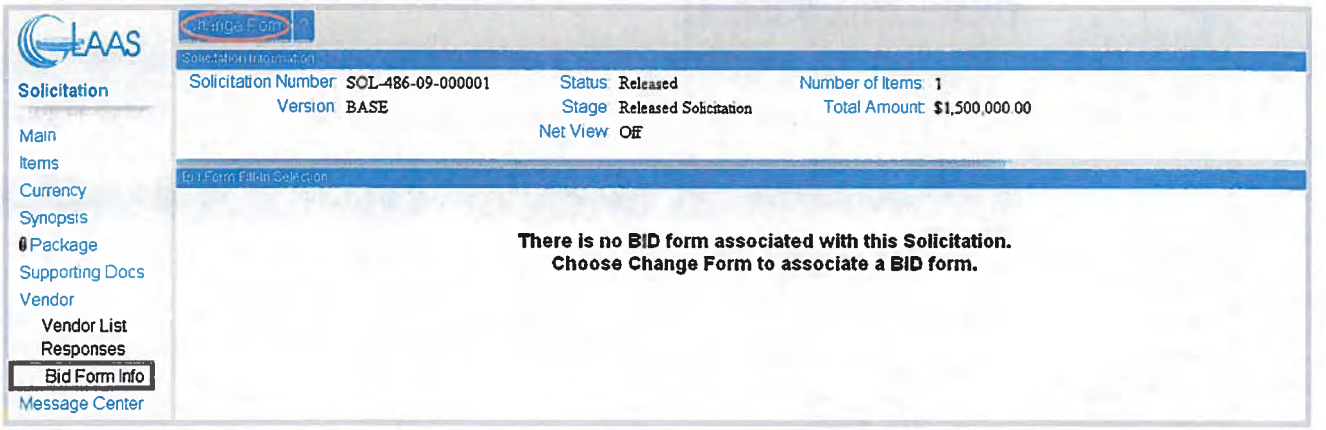


Figure 18: Vendor / Bid Form Info Screen

Steps	Section	User Action	Guidance
27.	Vendor / Bid Form Info	Click the **Change Form** toolbar button.	Using this screen is optional, but helpful to see all the bids/responses from the vendors listed in Responses. Since you can use several possible offer forms, GLAAS does not know which one to choose. You need to pick an offer form to use for these vendor bid responses.

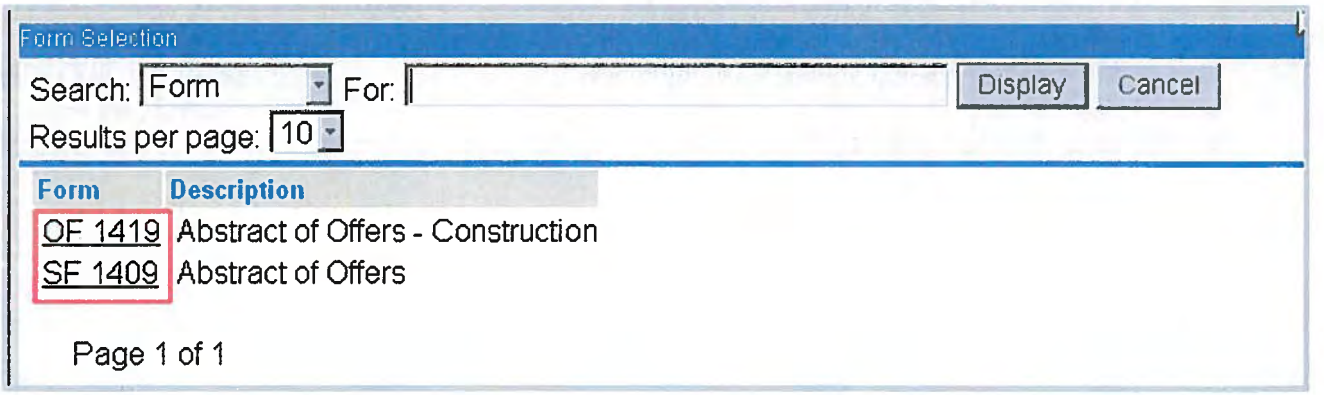


Figure 19: Form Selection Screen

Steps	Section	User Action	Guidance
28.	Form Selection	Click the **Form** link to select a form.	

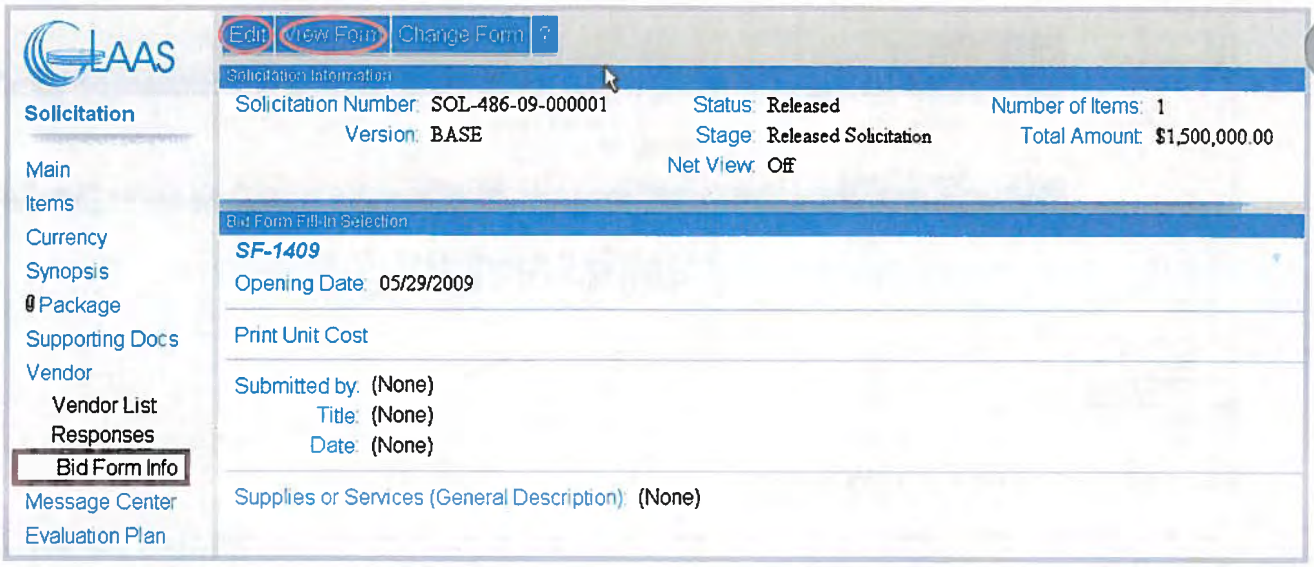


Figure 20: Vendor / Bid Form Info Screen

Steps	Section	User Action	Guidance
29.	Vendor / Bid Form Info	Click the **Edit** toolbar button to fill out the fields in the form (not shown). To preview the bid form, click the **View Form** toolbar button. Click the **View Form** toolbar button again on the next screen (not shown) to view a PDF version of the bid form.	The *Filling Out A Form* user guide describes how to work with GLAAS forms in more detail.
30.	Vendor / Bid Form Info	You have finished updating a Vendor List with Vendor Response information.	GLAAS will save the Solicitation with the vendor bid responses for you.

GLAAS USER GUIDE:

ROUTING A DOCUMENT

PURPOSE:

This user guide will show you how to route a document. Determining how to route a document will be based on your role and the document you are routing. Requestors will route their Requisitions for "Review" to the Financial Management (FM) offices and as a "Courtesy Copy" to the Program Manager (PM). A&A Specialists will route their Awards, Solicitations and Funding Opportunities for "Approval" to the Contracting/Agreements Officer (CO/AO).

BEFORE STARTING:

In order to route a document, you must have access to a GLAAS document.

STEPS:

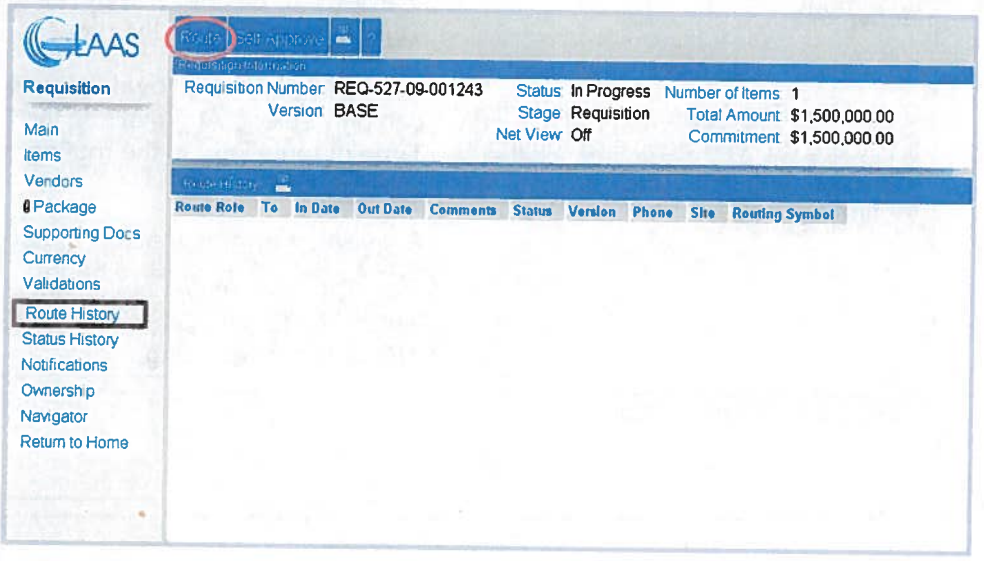


Figure 1: Route History Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Open a GLAAS Document (not shown).	This user guide will display screen shots from a Requisition, but the steps to route an Award are the same.
3.	Route History	Click the **Route** toolbar button.	The **Route** toolbar button can also be accessed from the **Main / General** screen.

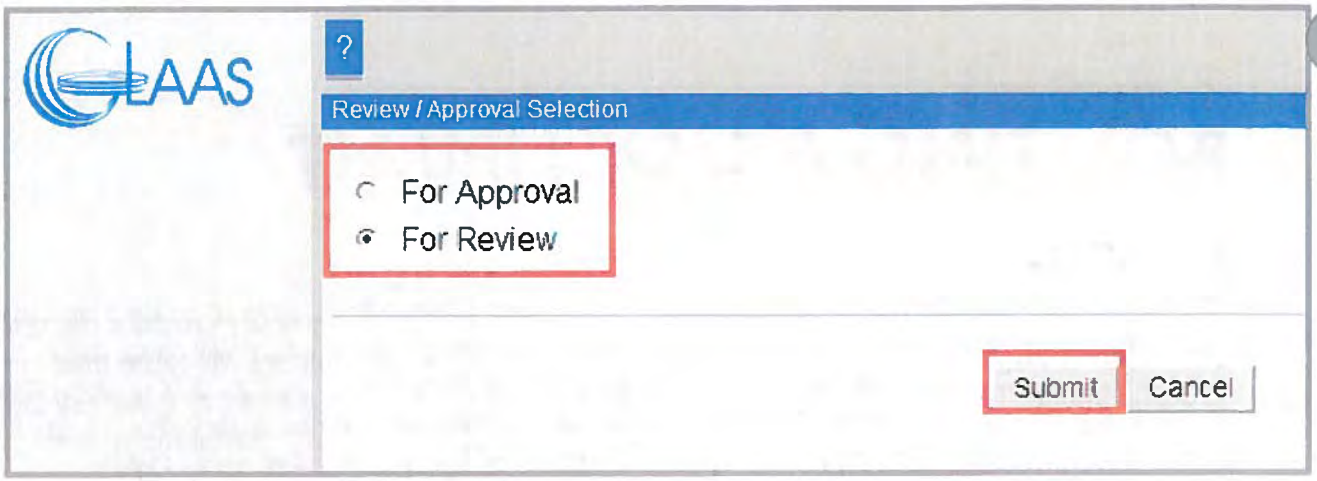


Figure 2: Review / Approval Selection Screen

Steps	Section	User Action	Guidance
4.	Review / Approval Selection	Select the **For Review** radio button if you are a Requestor routing a document. OR Select the **For Approval** radio button if you are an A&A Specialist routing to a CO/AO, or a PM routing to yourself for final approval.	If selecting **For Review**, the user will have the option to select either "Review" or "Courtesy Copy" as the **Type** of route later in the process. If selecting **For Approval**, the user can only select "Approval" as the **Type** of route later in the routing process. Acquisition awards that are routed **For Approval** must have been submitted to, and finalized in, FPDS-NG before proceeding.
5.	Review / Approval Selection	Select the **Submit** button.	

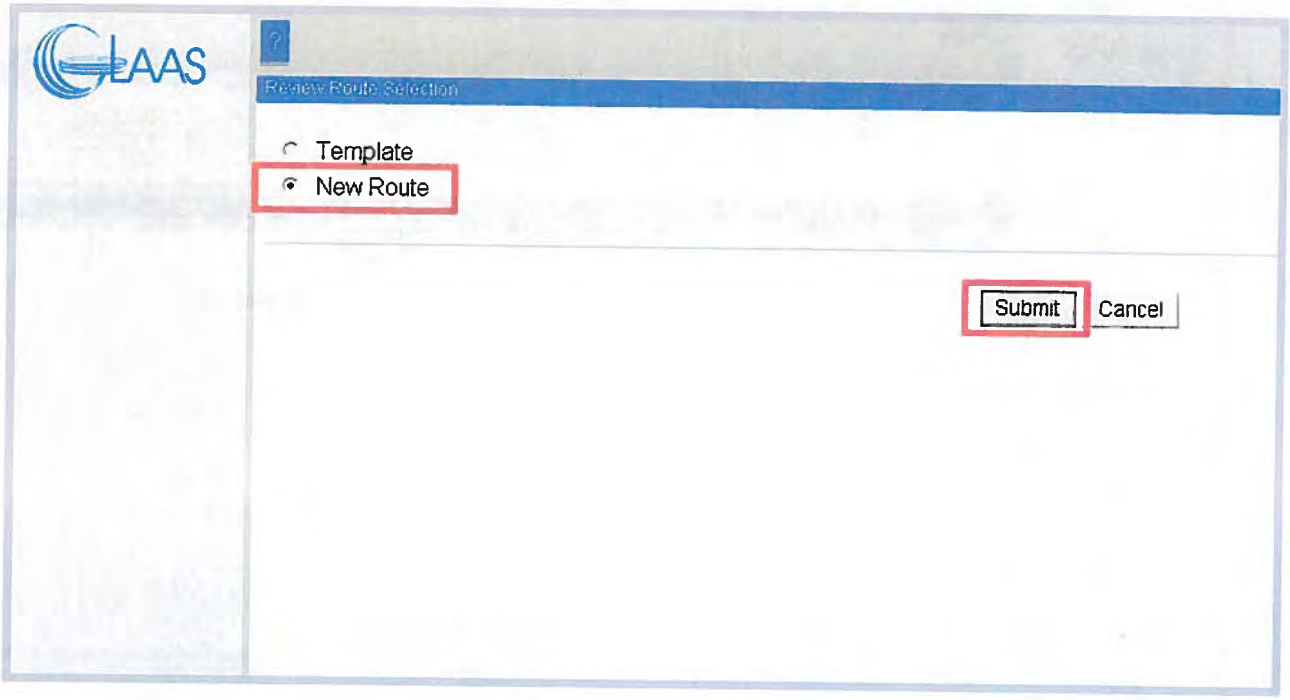


Figure 3: Review Route Selection Screen

Steps	Section	User Action	Guidance
6.	Review Route Selection	Click the **New Route** radio button to create a brand new route.	If the document has been routed before, there will be an extra option here called **Previous Route**. Selecting this option will re-create the route previously used on the document. Click the **Recommended Route** radio button to see a routing list recommended to you based upon your document type (not shown). Click the **Template** radio button to see routing lists created for you by your Site Administrator (not shown). Click the **Private Template** radio button to see Routing Lists that you have created under **My Profile** (not shown).
7.	Review Route Selection	Click the **Submit** button.	

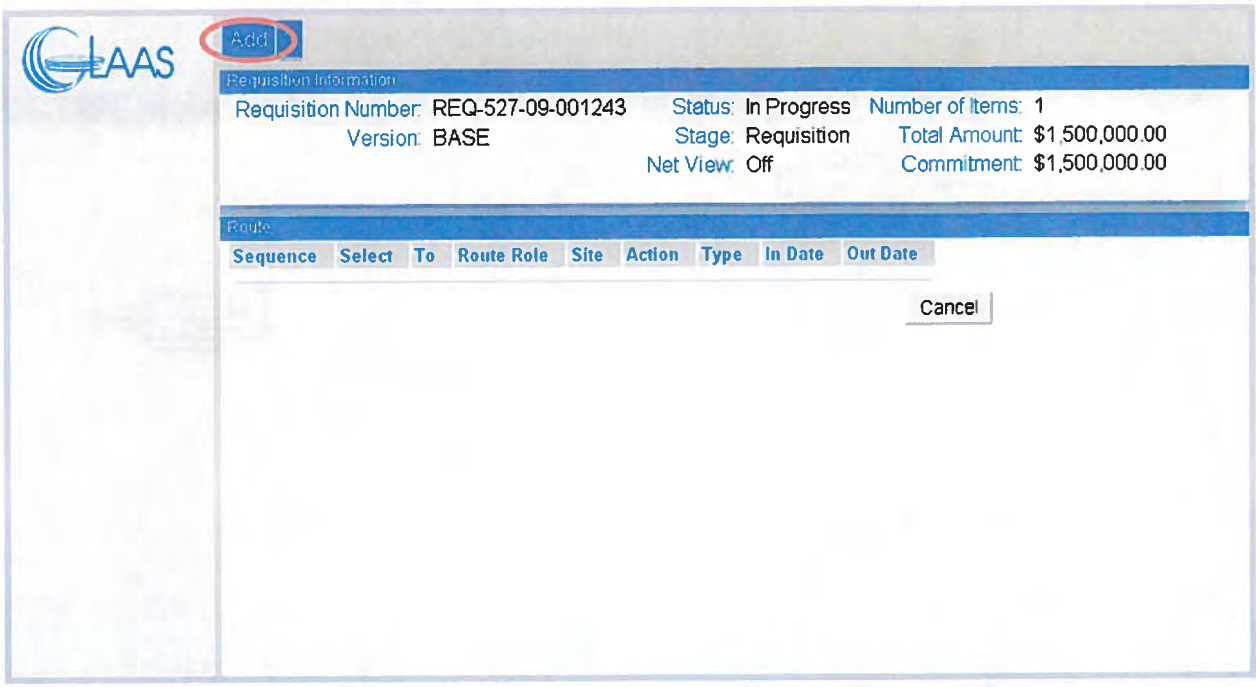


Figure 4: Route Screen

Steps	Section	User Action	Guidance
8.	Route	Click the **Add** toolbar button.	

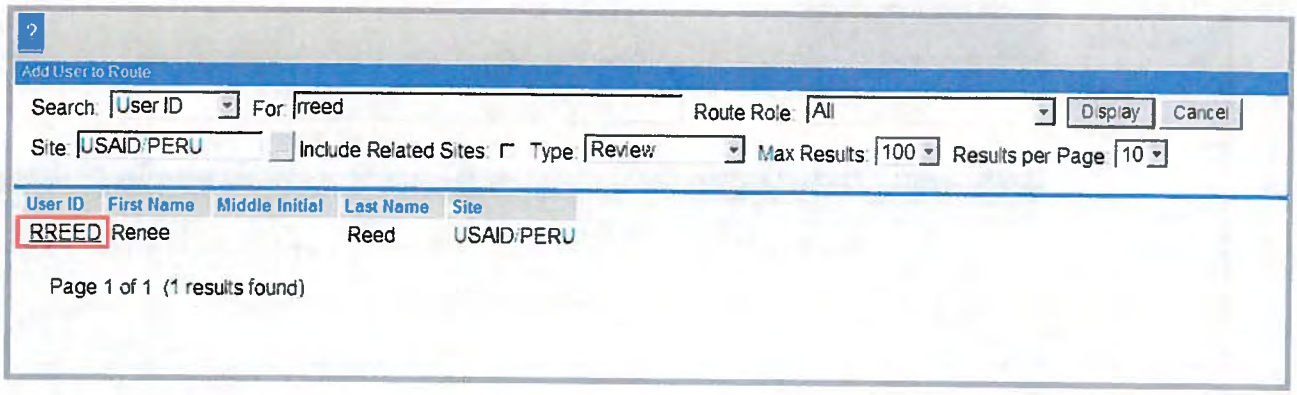


Figure 5: Add User to Route Screen

Steps	Section	User Action	Guidance
9.	Add User to Route	Select the **User ID** for your route list.	You can search for users by "User ID," "Last Name," or "First Name."

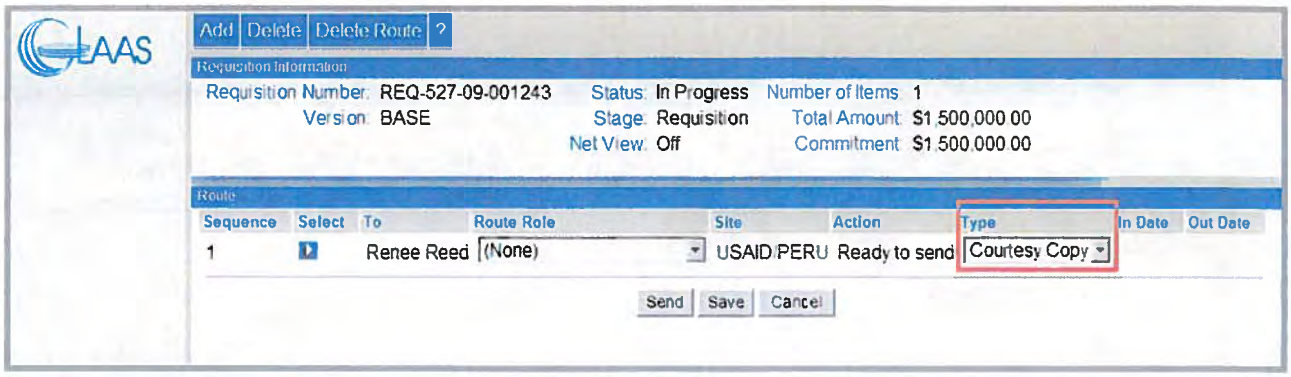


Figure 6: Route Screen

Steps	Section	User Action	Guidance
10.	Route	Select the correct route **Type** from the dropdown list.	You can add multiple users to your route list. Select "Courtesy Copy" as the route **Type** for PMs. Select "Approval" as the route **Type** for CO/AOs. Select "Review" as the route **Type** for all other users. If routing to a CO/AO for "Approval," select "CO/AO" as the **Route Role** (not shown).
11.	Route	Repeat **Steps 8-10** to add more users to your route list (not shown).	
12.	Route	If your route list needs revisions, follow **Steps 13-18** to modify the route list. OR If your route list is complete, go to **Step 22** to continue routing the document.	Any additional users on your route list should be sequenced before the PM or CO/AO, and their route **Type** should be set to "Review" (not shown).

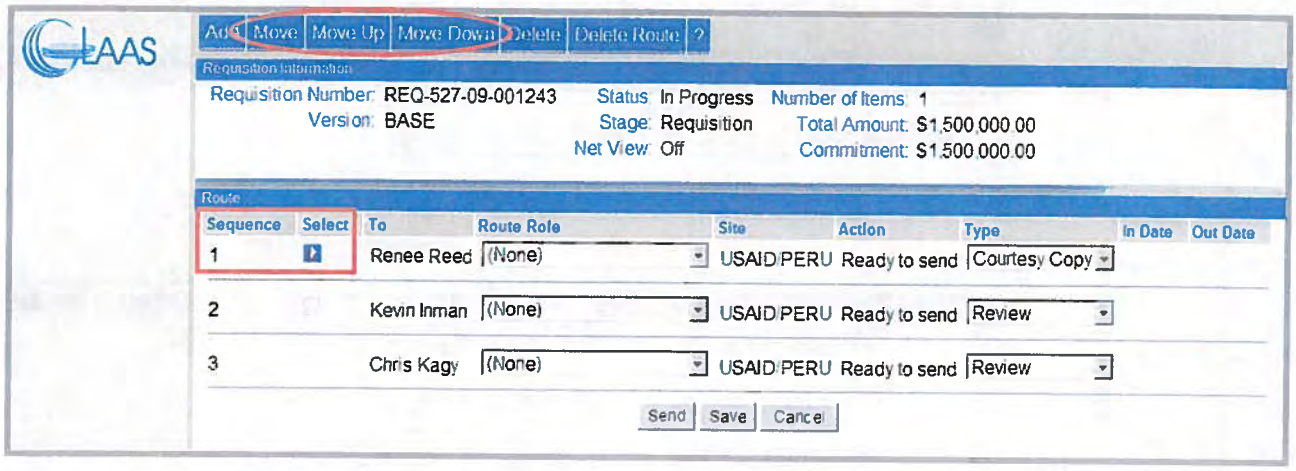


Figure 7: Route Screen

Steps	Section	User Action	Guidance
13.	Route	Click the **Move Up** toolbar button or **Move Down** toolbar button to move the user's sequence into the same position as the user before or after him/her, if necessary (not shown). Continue with **Step 17**. OR To specify a **Sequence** number for a user, select the user and then click the **Move** toolbar button.	The **Sequence** column shows the order in which users will receive the document. **Sequence** "1" will receive it first, then "2," and so on. When two users have the same **Sequence** number, they will receive the document at the same time (not shown). Before the document can move onto the next **Sequence**, all the users in the current **Sequence** must review the document before it can move to the next **Sequence**.

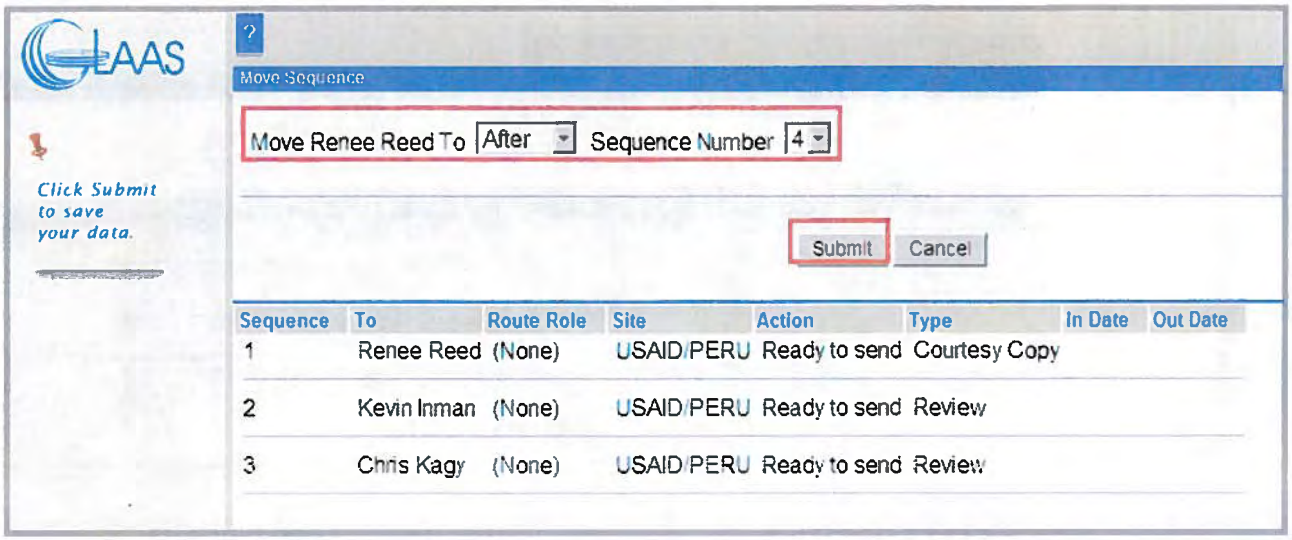


Figure 8: Move Sequence Screen

Steps	Section	User Action	Guidance
14.	Move Sequence	Select a value from the two dropdown lists to specify exactly where you want to place a user in the route; either "Before," "Within," or "After" a particular **Sequence Number**.	To move a user to the end of the route list, select "After" and the highest **Sequence Number** from the dropdown lists.
15.	Move Sequence	Click the **Submit** button to change the user sequence in the route list.	

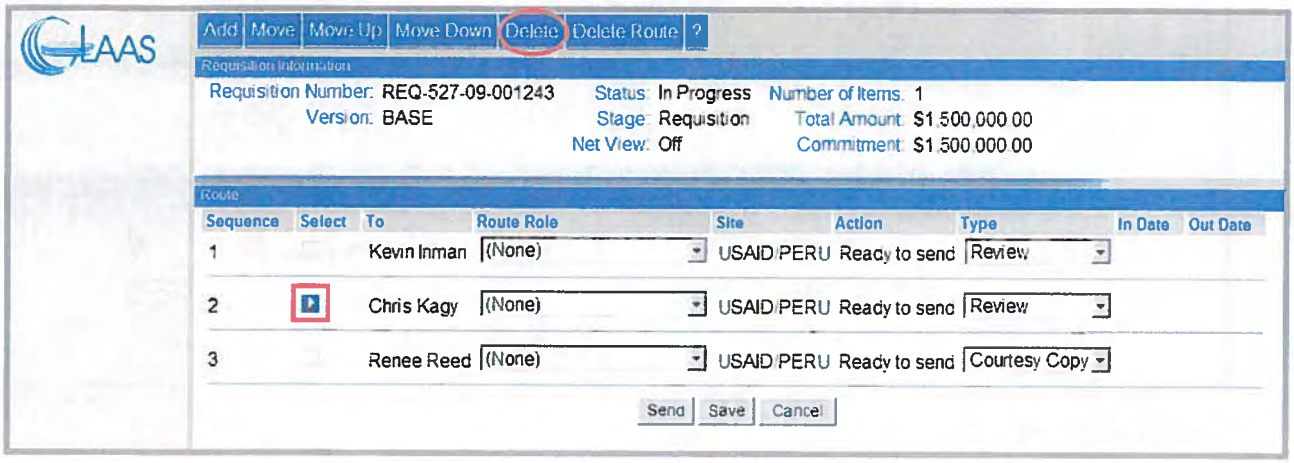


Figure 9: Route Screen

Steps	Section	User Action	Guidance
16.	Route	To remove a user from the route list, **Select** the user and then click the **Delete** toolbar button.	

Figure 10: Delete User Screen

Steps	Section	User Action	Guidance
17.	Delete User	Click the **OK** button to confirm.	

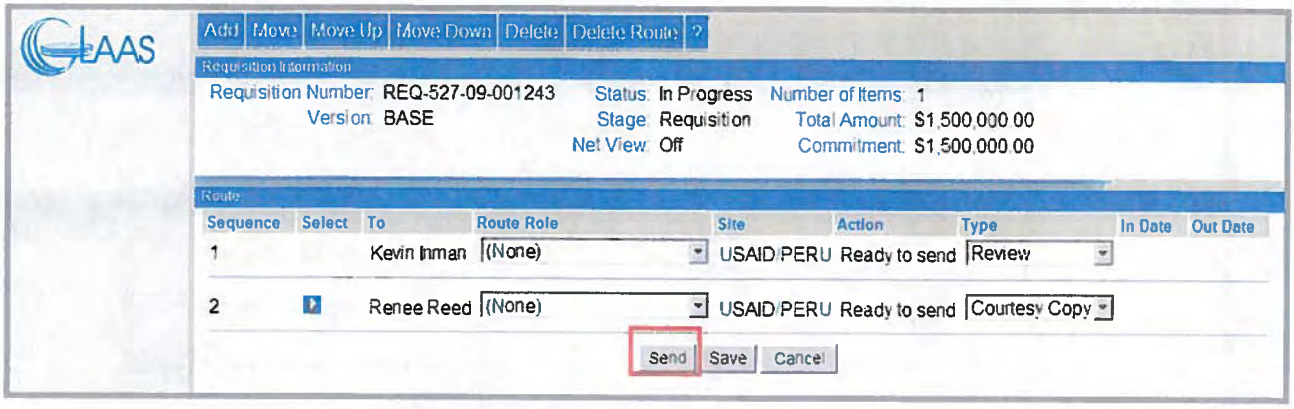


Figure 11: Route Screen

Steps	Section	User Action	Guidance
18.	Route	Click the **Send** button to route the document.	The PM must receive the document as a "Courtesy Copy." The CO/AO must receive the document for "Approval." All others must receive the document for "Review." The PM or CO/AO must be the last person on the route list.

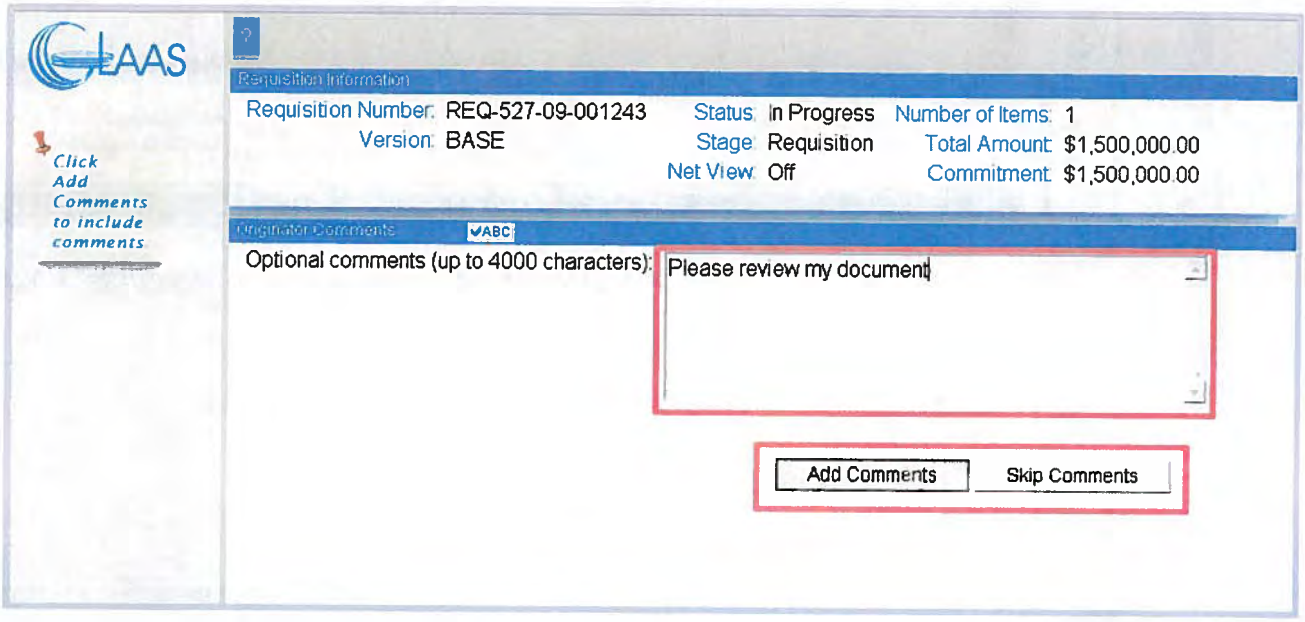


Figure 12: Originator Comments Screen

Steps	Section	User Action	Guidance
19.	Originator Comments	Type any necessary comments and then click the **Add Comments** button. OR Click the **Skip Comments** button if none are needed.	Comments will go with the document and appear as a **Y** link in **Route History**.

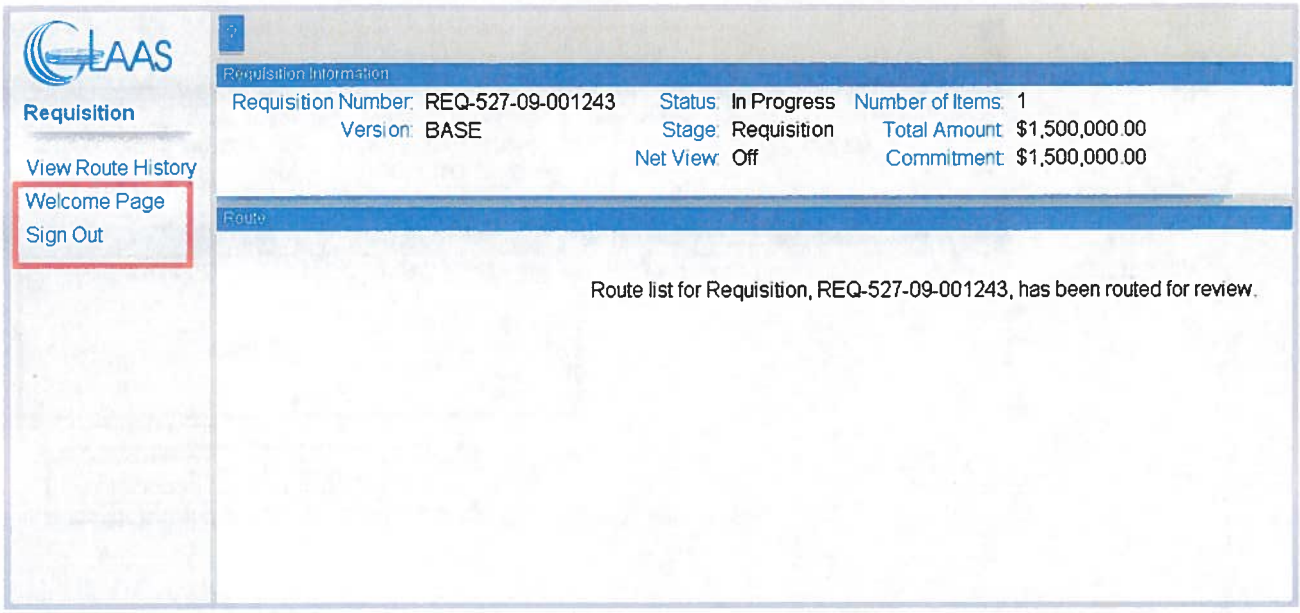


Figure 13: Route Screen

Steps	Section	User Action	Guidance
20.	Route	Click the **Welcome Page** or **Sign Out** link on the left-hand menu to exit the document.	

USAID
FROM THE AMERICAN PEOPLE

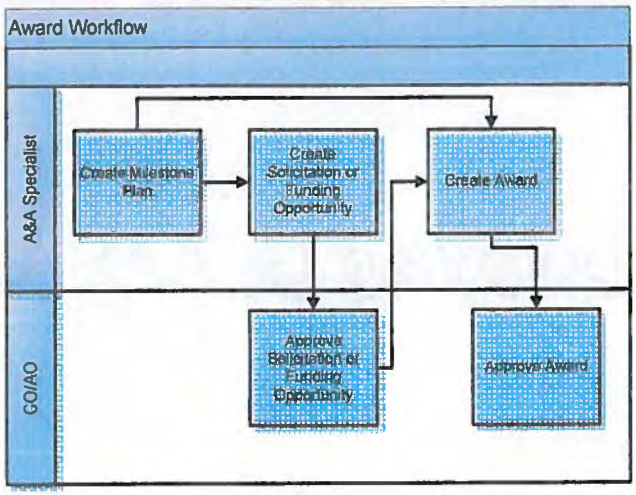
GLAAS: Approving GLAAS Awards

November 2009

Approving Awards Objectives

- At the end of this topic, you will be able to:
  - Review the award information
  - Review FPDS-NG / FAADS information
  - Run Phoenix validations in GLAAS
  - Approve the award

Award Workflow

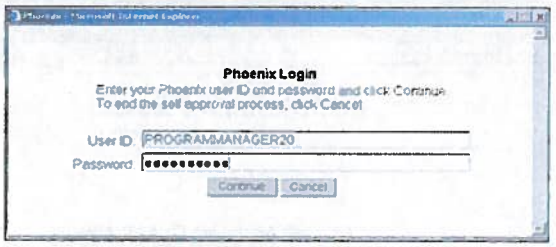


Approving an Award

- CO/AO must perform four main tasks after receiving an Award:
  - Review the award information
  - Review FPDS-NG / FAADS information
  - Run GLAAS and Phoenix validations
  - Approve the Award

Approving an Award (cont)

- GLAAS will prompt you to enter a Phoenix User ID and Password when:
  - Routing for approval
  - Approving the award
  - Running Phoenix validations



Approving an Award (cont)

- The Version field will say "Pending Financial Approval"

- The Award may remain in this status for a few minutes while GLAAS creates an obligation in Phoenix
- After the obligation has been finalized in Phoenix, the Version field will say "Released"

Disapproved by Phoenix

- The Version field will say "Disapproved" if Phoenix returns validations errors
- Review "Comments" in the Route History to find out why it was disapproved

Route History

Route Role	To	In Date	Out Date	Comments	Status	Version
(None)	Financial Interface		02/05/2007 03:47 PM	Y	Disapproved	BASE

GLAAS USER GUIDE:

APPROVING AN AWARD

PURPOSE:

This user guide will show you how to approve an Award in GLAAS.

BEFORE YOU START:

1. In order to approve an award in GLAAS you must be a Contracting/Agreements Officer (CO/AO), Mission Director, EXO, or Assistant Administrator (for Assistance Awards and IAAs only).
2. An Award must have been created and routed to you in GLAAS.

STEPS:

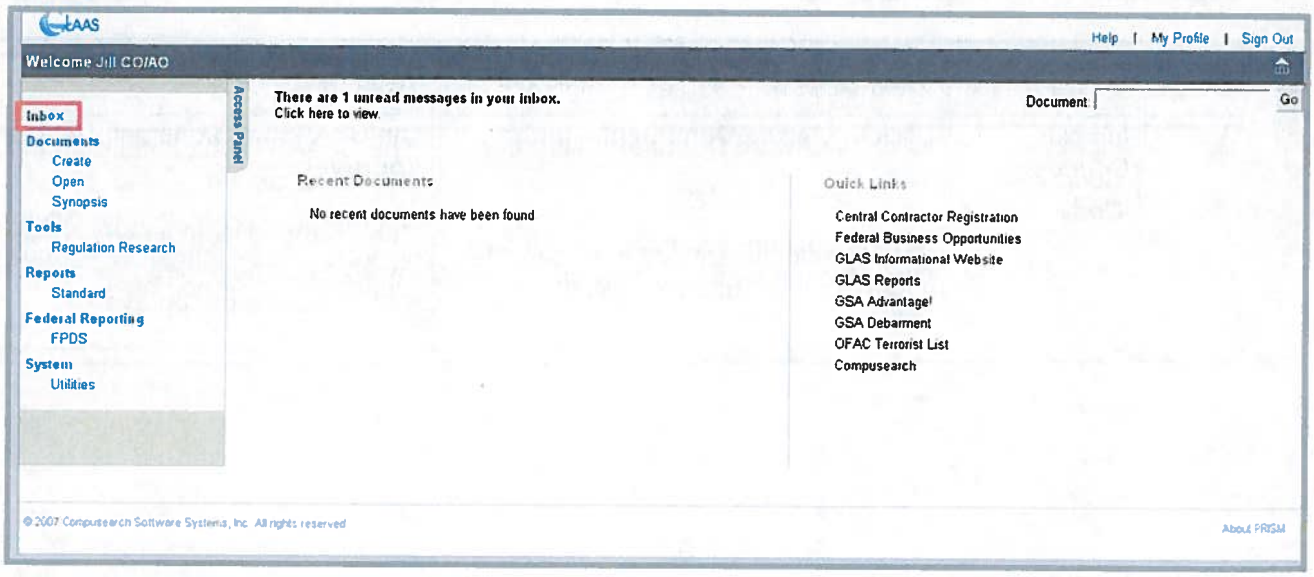


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log on to GLAAS (not shown).	
2.	Welcome	Click the **Inbox** link on the **Access Panel**. OR Click the **Click here to View** link under the notification of unread messages.	The **Welcome** screen will inform you if you have messages in your **Inbox**.

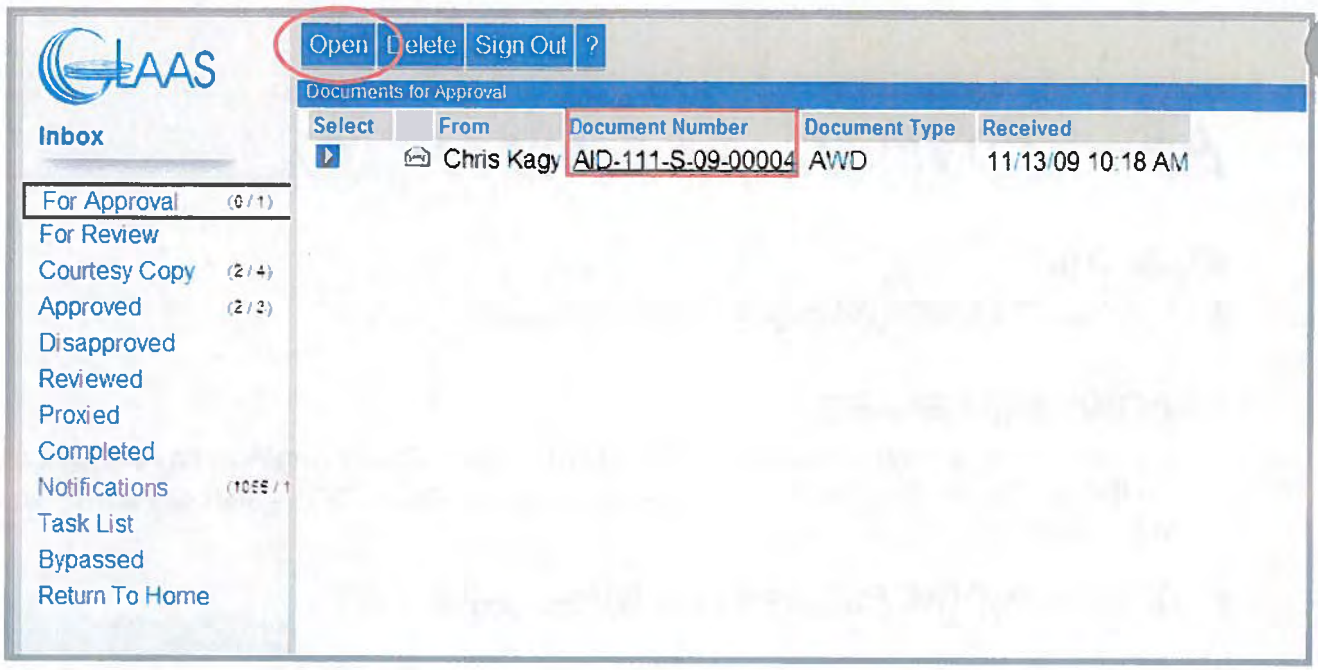


Figure 2: Inbox / For Approval Screen

Steps	Section	User Action	Guidance
3.	Inbox / Courtesy Copy	Click the Award **Document Number**. OR **Select** a document and then click the **Open** toolbar button to view the Award.	The GLAAS **Inbox** defaults to the **For Approval** screen. The **Inbox** will contain any active Awards that have been assigned to you for review or approval.

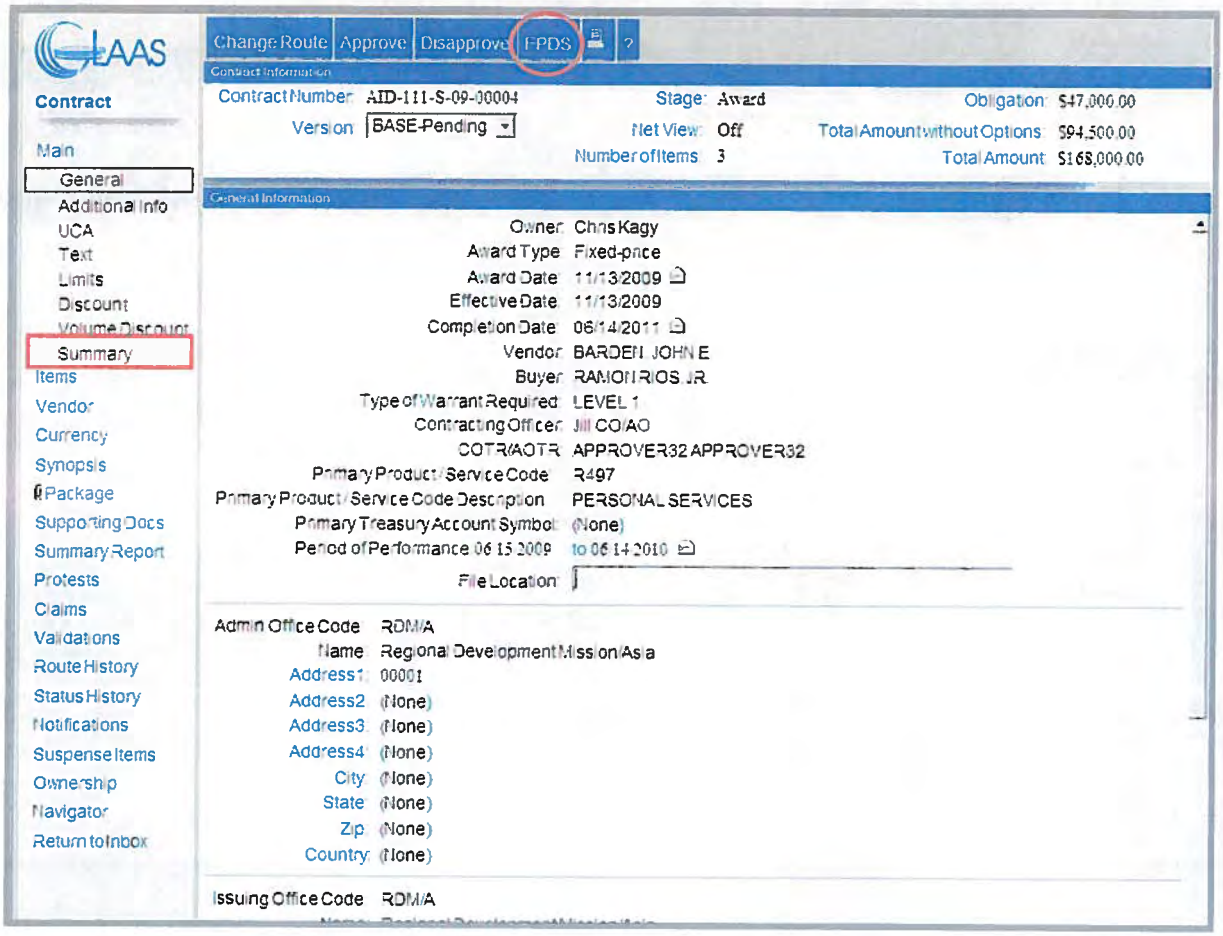


Figure 3: Main / General Screen

Steps	Section	User Action	Guidance
4.	Main / General	Review the information on this screen for accuracy. If it is an acquisition award, click the **FPDS** toolbar button to verify the FPDS record (not shown). OR For an assistance award, click the **FAADS** toolbar button to verify the FAADS record (not shown).	The **Main / General** screen shows basic information about the document. The **Version** of this document is "Pending" because it was routed for approval. The **Type of Warrant Required** is validated against the TEC of the Award. FPDS record validation is now required for acquisition documents and users will not be able to release an award if FPDS has not been finalized.
5.	Main / General	Click the **Summary** link on the left-hand menu.	

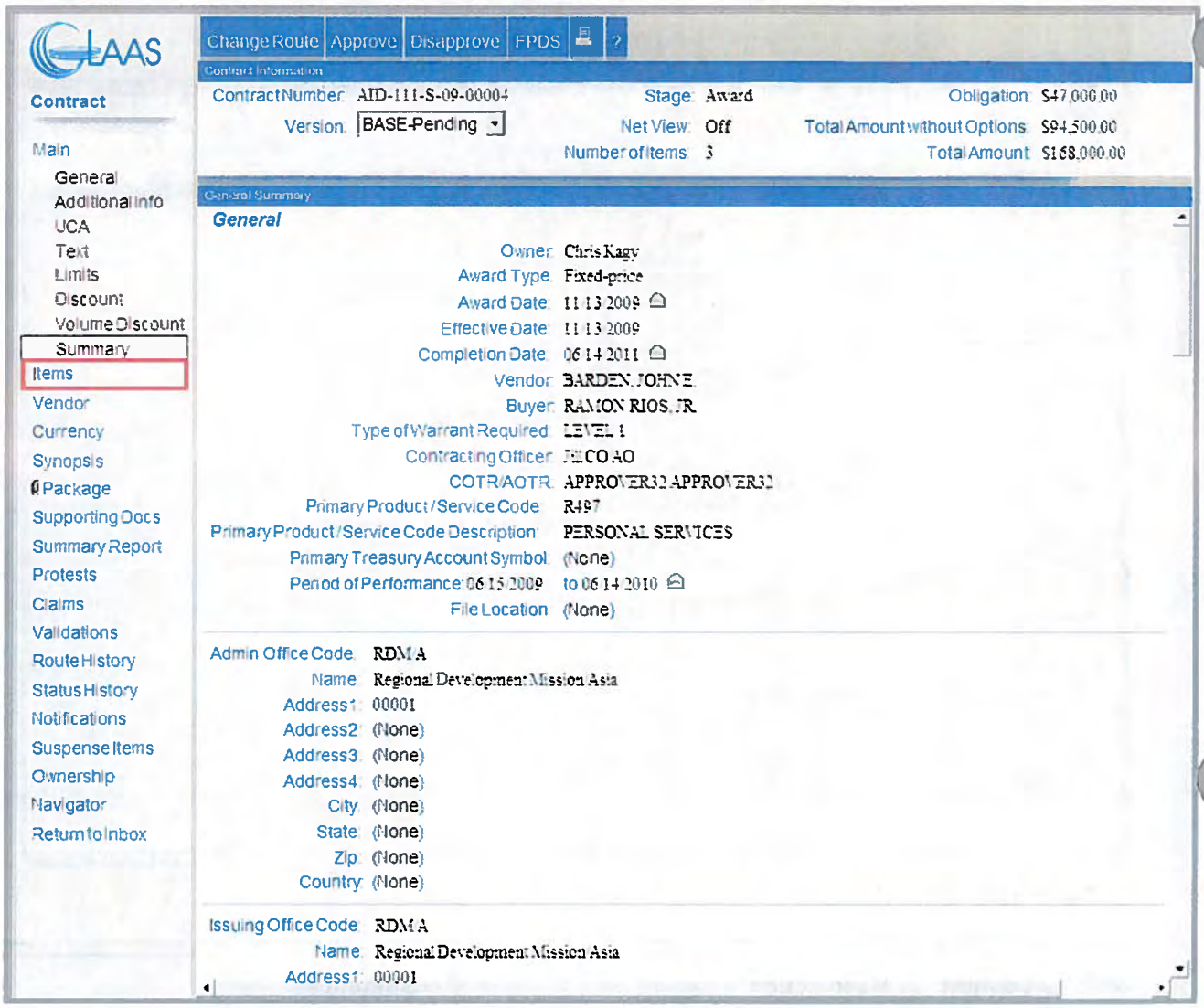


Figure 4: Main / Summary Screen

Steps	Section	User Action	Guidance
6.	Main / Summary	Review the information on this screen for accuracy.	
7.	Main / Summary	Click the **Items** link on the left-hand menu.	

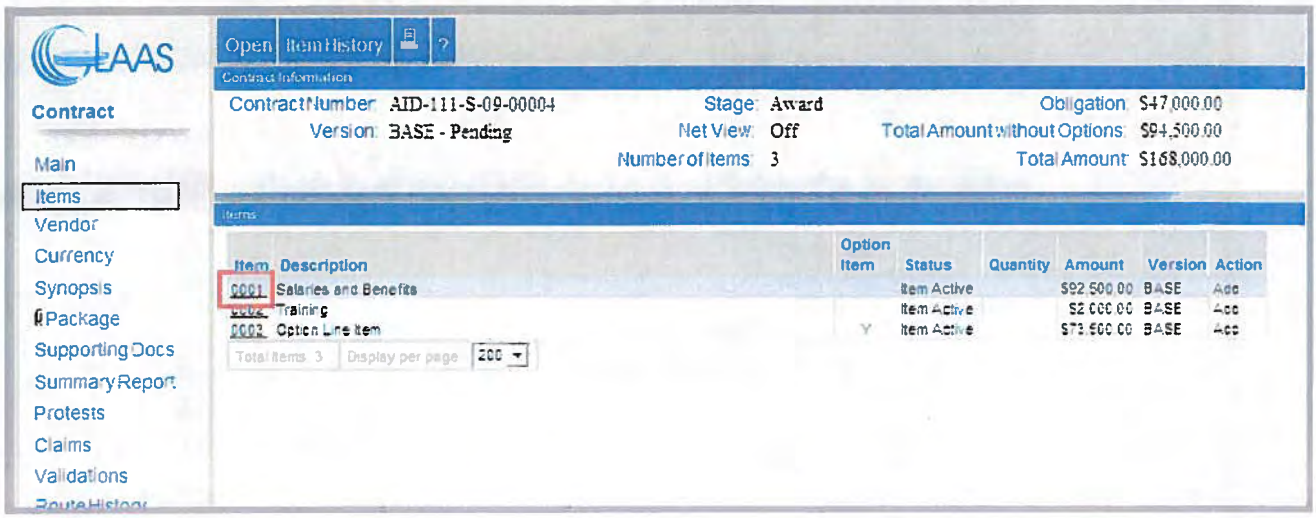


Figure 5: Items Screen

Steps	Section	User Action	Guidance
8.	Items	Click an **Item** number link.	

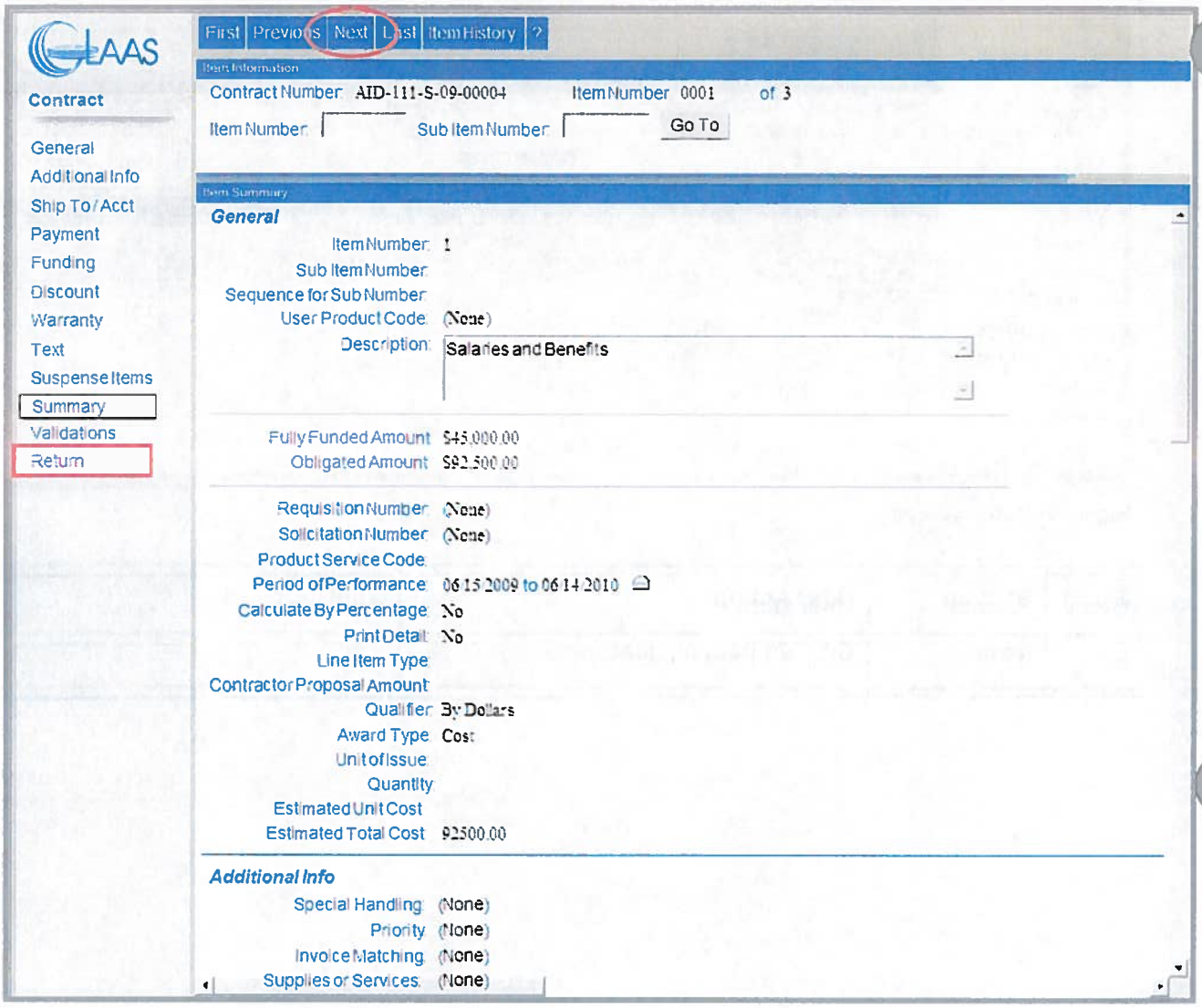


Figure 6: Items / Summary Screen

Steps	Section	User Action	Guidance
9.	Items / General	Click the **Summary** link on the left-hand menu (not shown).	
10.	Items / Summary	Review the information on this screen for accuracy.	The **Summary** screen displays all of the Item information, including accounting information.
11.	Items / Summary	Click the **Return** link on the left-hand menu.	If there are additional items, click the **Next** toolbar button and repeat **Step 10**.

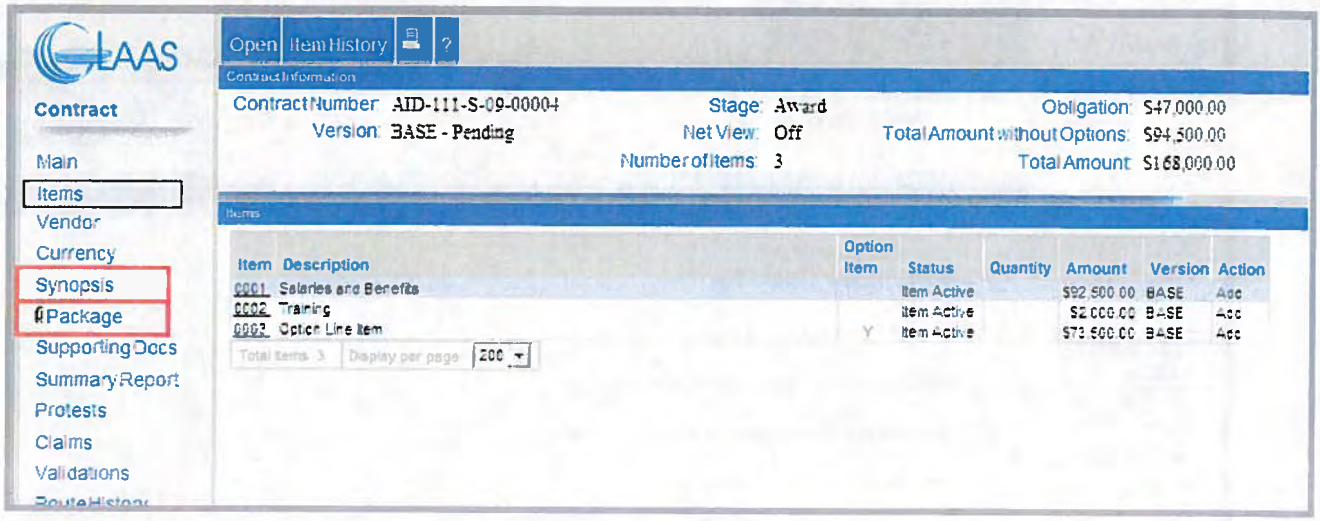


Figure 7: Items Screen

Steps	Section	User Action	Guidance
12.	Items	Click the **Synopsis** link on the left-hand menu to verify the award notice (not shown).	This action is only for Fedbizopps and does not apply to assistance awards.
13.	Items	Click the **Package** link on the left-hand menu.	

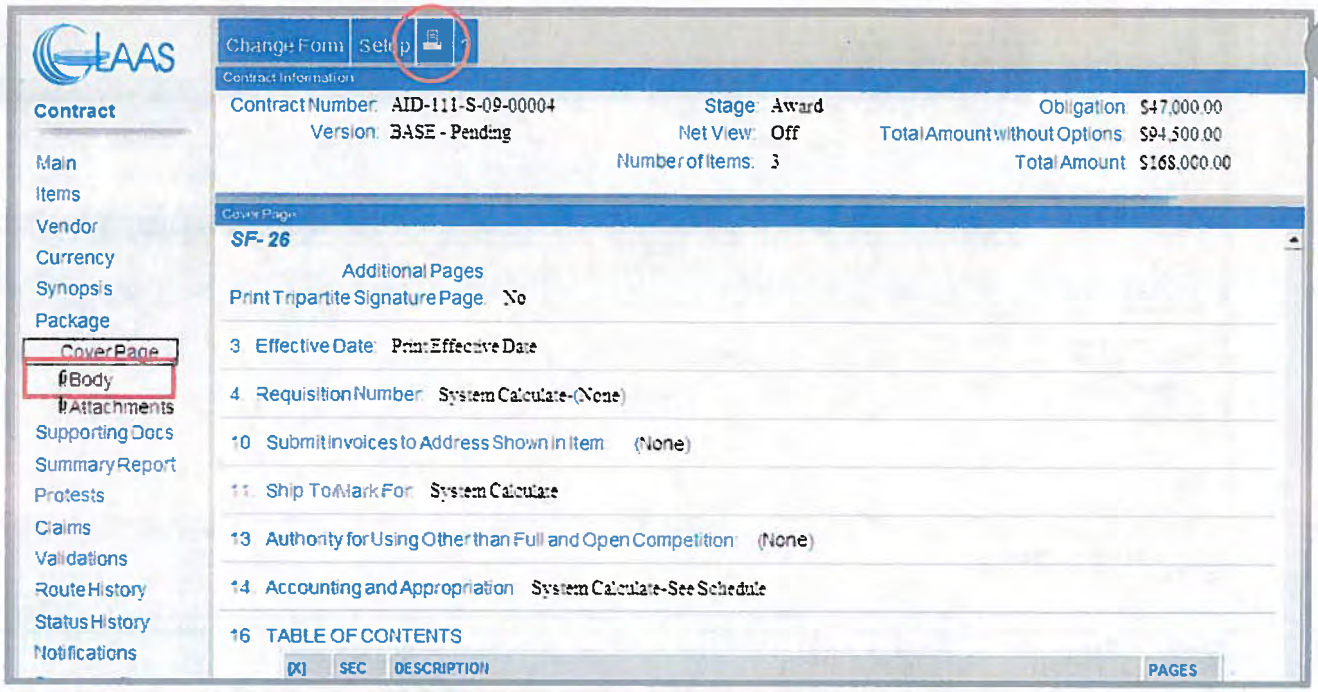


Figure 8: Package / Cover Page Screen

Steps	Section	User Action	Guidance
14.	Package / Cover Page	Click the **Printer** toolbar button ( ) to view the **Cover Page**. Click the **View Form** button to view a PDF version of the **Cover Page** (not shown). Click the **Cancel** button on the **View Form** screen to return to the **Package/Cover Page** screen (not shown).	Refer to the *Filling out a Form* user guide on how to view and edit the **Cover Page**. The **Cover Page** screen does not apply to assistance awards.
15.	Package / Cover Page	Click the **Package / Body** link on the left-hand menu.	

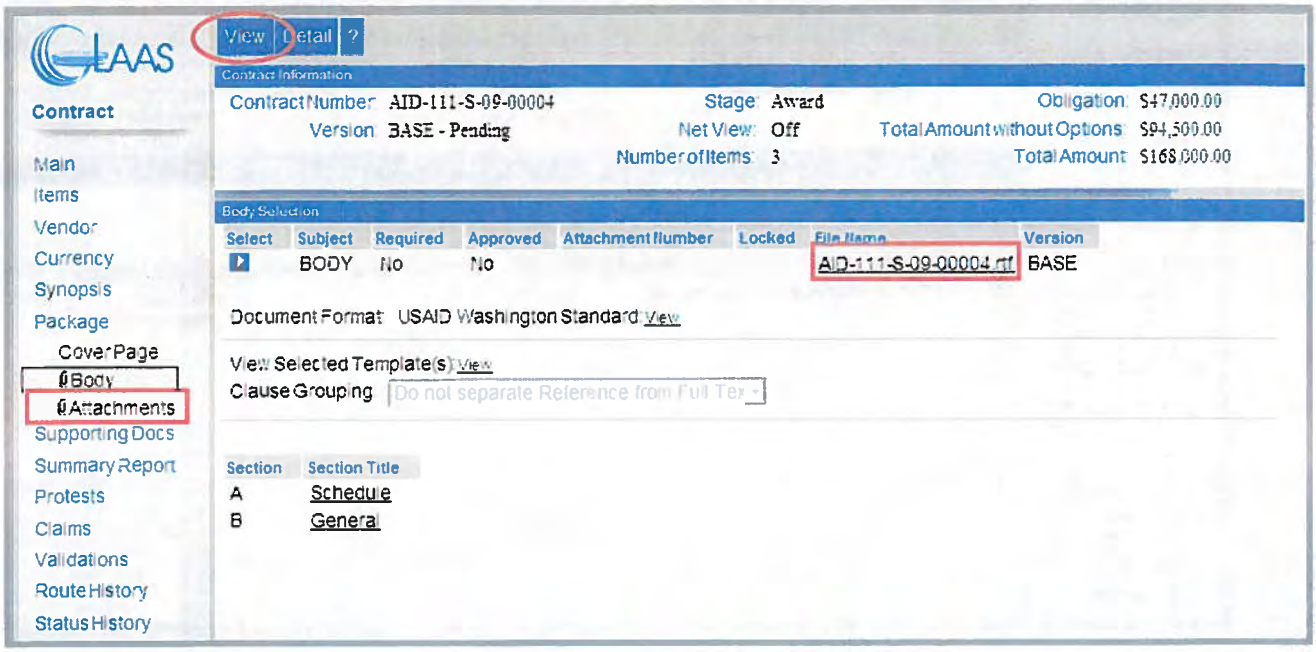


Figure 9: Package / Body Screen

Steps	Section	User Action	Guidance
16.	Package / Body	Click the **File Name** link or the **View** toolbar button to review the document body in a separate window, in read-only mode (not shown).	A paper clip graphic on the left-hand menu indicates that an attachment or a supporting document has been attached to the award. The **Cover Page** for assistance documents can be viewed here, within the clauses of the **Body**.
17.	Package / Body	Click the **Attachments** link on the left-hand menu.	

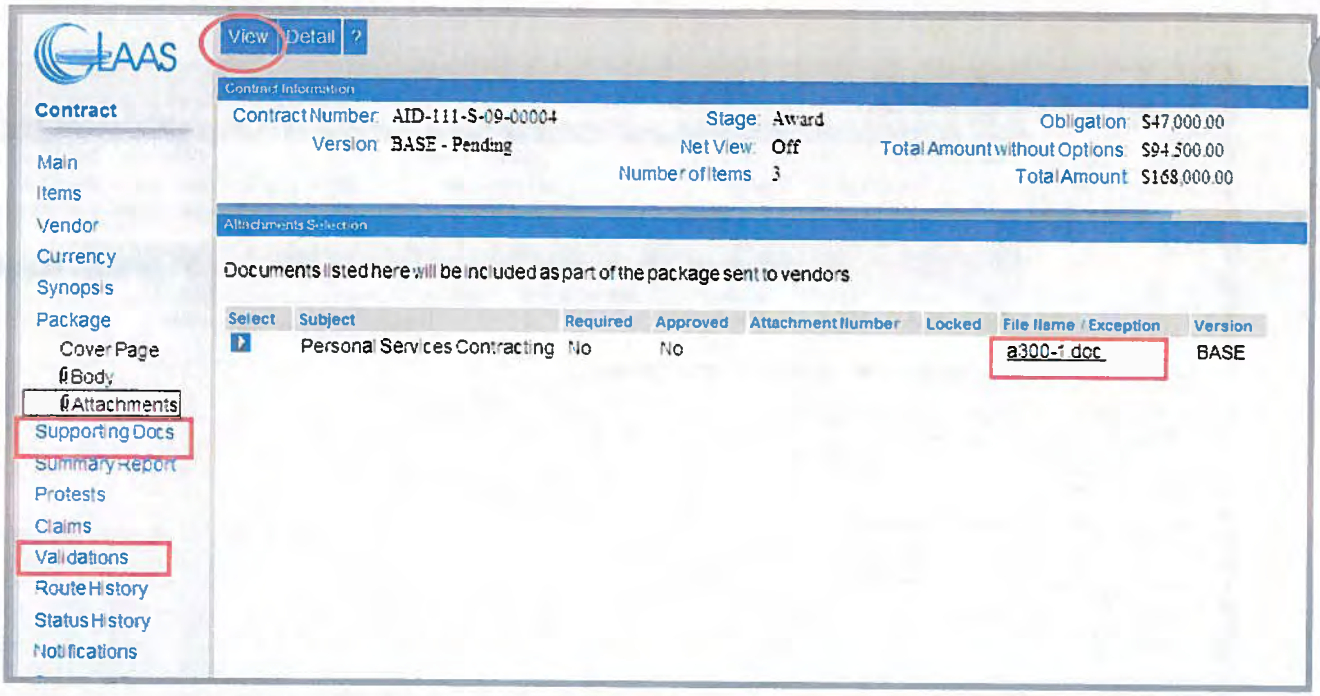


Figure 10: Package / Attachments Screen

Steps	Section	User Action	Guidance
18.	Package / Attachments	Click the **File Name** link or the **View** toolbar button to review the attachment in a separate window, in read-only mode (not shown).	Repeat **Step 18** if there are multiple attachments. Refer to the *Attachment and Supporting Documents* user guide for more information.
19.	Package / Attachments	Click the **Supporting Docs** link on the left-hand menu.	
20.	Supporting Docs	Click the **File Name** link or the **View** toolbar button to review the document in a separate window, in read-only mode (not shown).	Repeat **Step 20** to review the supporting documents (not shown). Refer to the *Attachment and Supporting Documents* user guide for more information.
21.	Supporting Docs	Click the **Validations** link on the left-hand menu.	

Validations

Warning Messages

Location	Message	Extended Text
Main	BARDEN, JOHN E. does not have an active CCR registration.	

Total Warnings: 1

Figure 11: Validations Screen

Steps	Section	User Action	Guidance
22.	Validations	Note any errors or warnings.	The Validations screen appears with a list of **Error Messages** and/or **Warning Messages**. An **Error Message** must be corrected to continue. **Warning Messages** should be corrected before continuing, but the system will not require it. If there are no GLAAS errors, the system will prompt you to run the Phoenix validations.

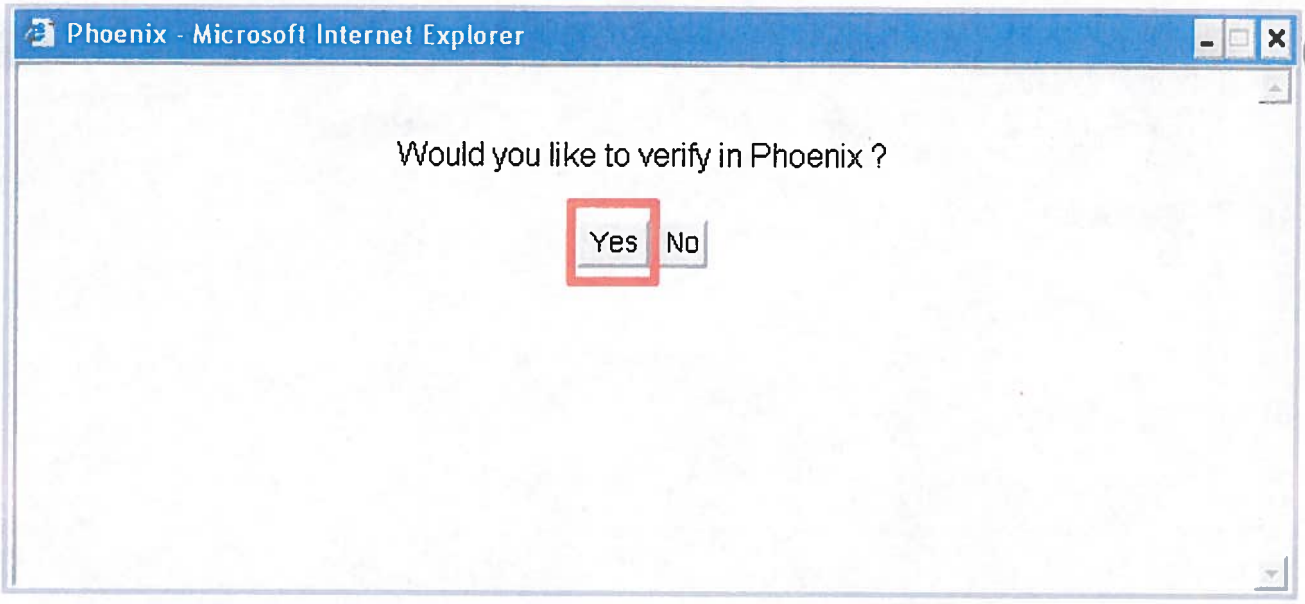


Figure 12: Phoenix Login Screen

Steps	Section	User Action	Guidance
23.	Phoenix Login Screen	Click the **Yes** button to log into Phoenix once all the **Error Messages** have been resolved.	You must have a User ID and Password for Phoenix to validate through the financial interface and approve GLAAS documents.

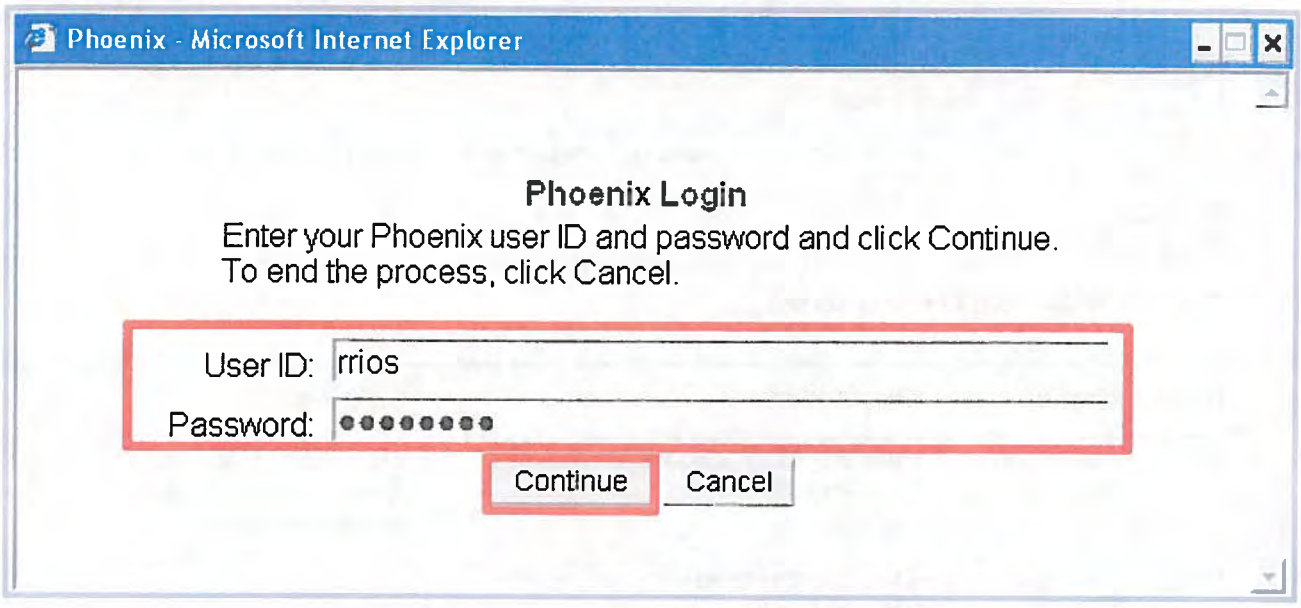


Figure 13: Phoenix Login Screen

Steps	Section	User Action	Guidance
24.	Phoenix Login Screen	Enter your Phoenix **User ID** and **Password.**	You only have to enter your Phoenix credentials once per session of GLAAS.
25.	Phoenix Login Screen	Click the **Continue** button.	If a Phoenix User ID or password is entered incorrectly, you will receive an error message stating "**Base Credentials: Invalid Momentum User ID/Password.**" Correctly, re-enter credentials again to login.

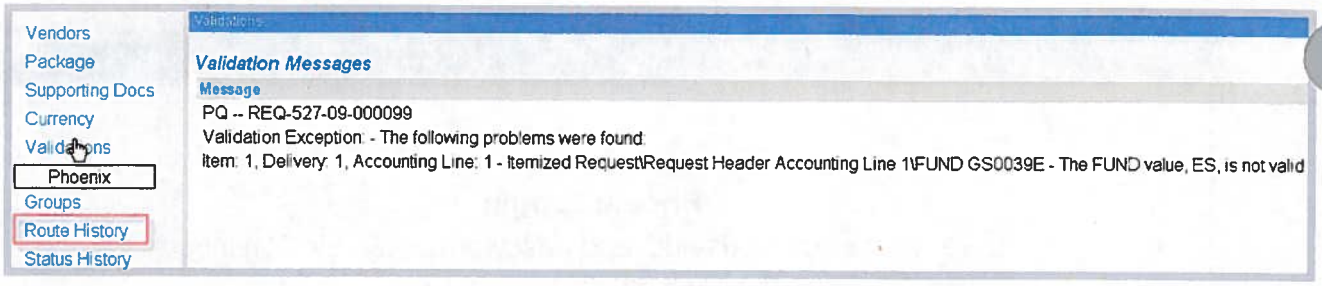


Figure 14: Validations / Phoenix Screen

Steps	Section	User Action	Guidance
26.	Validations / Phoenix	Note any **Error Messages** received from Phoenix.	If there are no errors, a message will appear stating: "Validation in Phoenix was successful."
27.	Validations / Phoenix	Click the **Route History** link on the left-hand menu.	

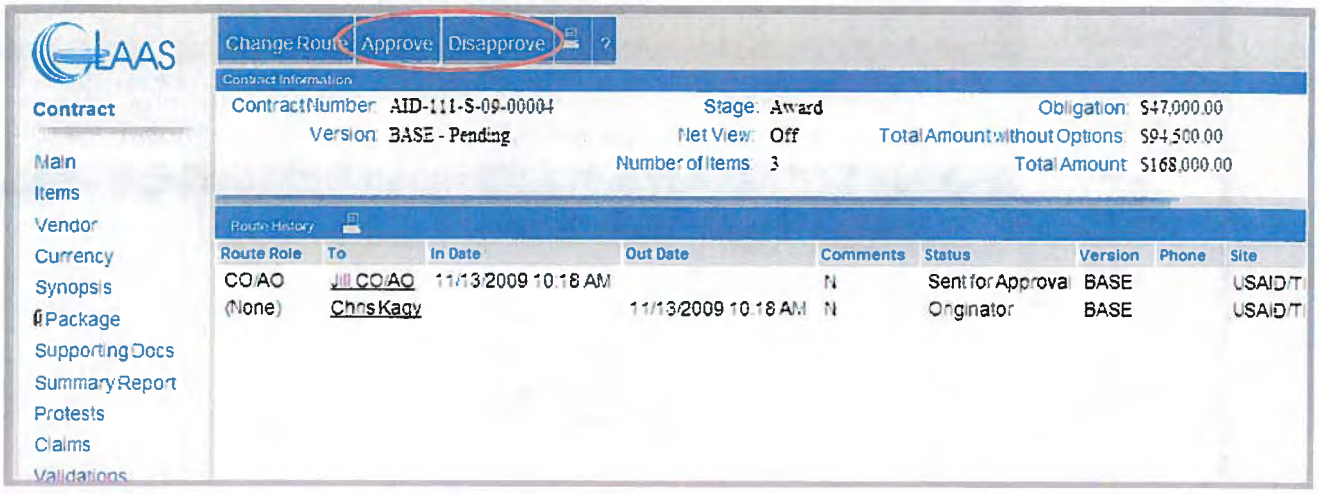


Figure 15: Route History Screen

Steps	Section	User Action	Guidance
28.	Route History	If you found no errors during your review of the document, click the **Approve** toolbar button. OR If you did find errors, click the **Disapprove** toolbar button and proceed to **Step 34**.	

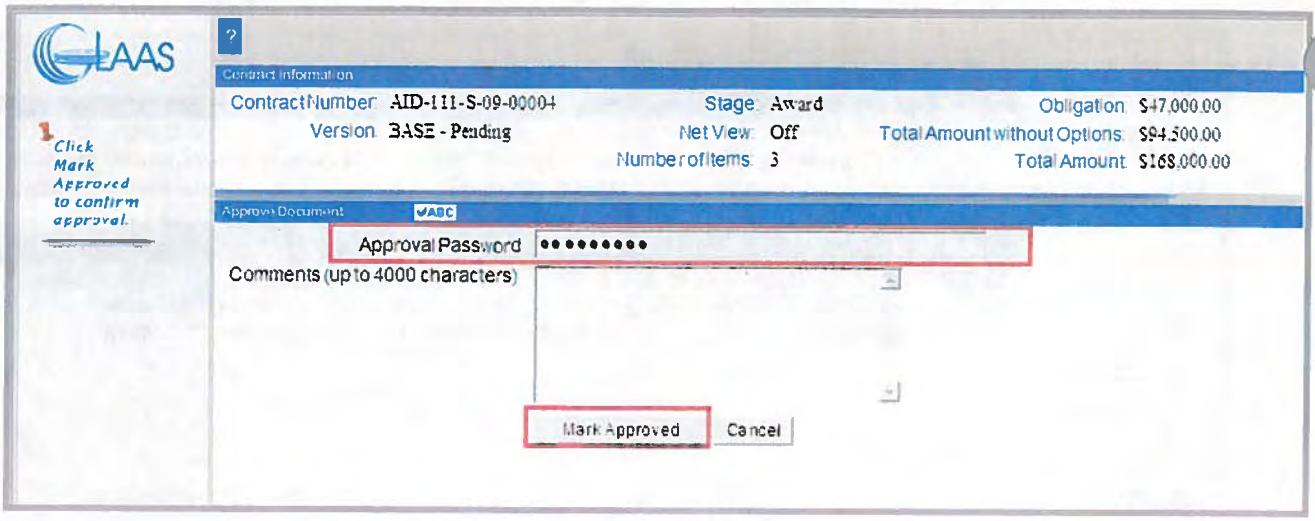


Figure 16: Approve Document Screen

Steps	Section	User Action	Guidance
29.	Approve Document	Enter your **Approval Password** and then click the **Mark Approved** button.	When approving awards, GLAAS will prompt you to enter a Phoenix **User ID** and **Password** if not done on previous screens.
30.	Route History	Click the **View Route History** link on the left-hand menu (not shown).	Phoenix will send a confirmation once the Award is approved or disapproved. Once the document has been sent to Phoenix the status will change to: • "Pending Financial Approval" – meaning the document is waiting for Phoenix to approve or disapprove the Award. • "Approved" – meaning the funds have been obligated in Phoenix but the document has not been finalized in GLAAS. • "Released" – meaning the funds have been obligated in Phoenix and the document has been finalized in GLAAS. • "Disapproved" – meaning there are additional errors from Phoenix that need to be resolved before the funds can be obligated in Phoenix.

FPDS NG

PIID	Referenced PIID	FPDS Approval Number	Date Finalized
AID52700900025	(None)	2089007813	7/10/2009

Figure 17: Main / Additional Info Screen

Steps	Section	User Action	Guidance
31.	Route History	Click the **Main** link on the left-hand menu (not shown).	
32.	Main / Additional Info	Click the **Additional Info** link on the left-hand menu (not shown). Scroll down to view the **FPDS NG** information.	The **PIID** Number signifies that FPDS-NG has received information about the award, and the **FPDS Approval Number** means the award has been validated and reported. To have an **FPDS Approval Number**, an Award must be "Approved" and "Released."
33.	Main / Additional Info	Click the **Return to Inbox** link on the left-hand menu.	You have completed the Approval process.

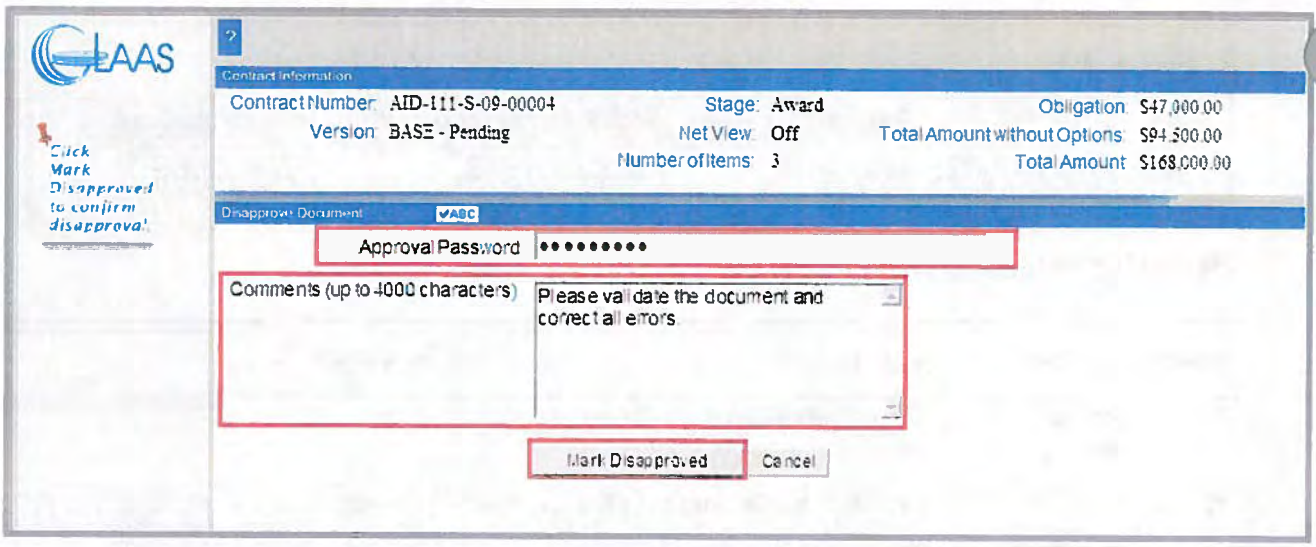


Figure 18: Disapprove Document Screen

Steps	Section	User Action	Guidance
34.	Disapprove Document	If you clicked the **Disapprove** toolbar button in **Step 28**, enter your **Approval Password** and **Comments** to the A&A Specialist. Click the **Mark Disapproved** button.	Use the **Comments** field to document changes that the A&A Specialist needs to make to the award.
35.	Main / General	Click the **Return to Inbox** link on the left-hand menu.	You have completed the Approval process.

GLAAS 102 USER GUIDE:

CREATING FPDS-NG RECORDS THROUGH GLAAS

PURPOSE:

This user guide will show you how to create the FPDS-NG record through GLAAS.

As mandated by the *Federal Acquisition Regulation (FAR) Subpart 4.6, Contract Reporting, Section 4.602(c)(1) Federal Procurement Data System*, "Data collection points in each agency shall submit FPDS-required data on contract actions directly to FPDS-NG. Agencies must report all transactions over $3,000 and modifications to those transactions regardless of dollar value."

BEFORE YOU START:

1. In order to create a FPDS-NG record, you must be an A&A Specialist, a CO or an EXO.
2. In order to approve a FPDS-NG record, you must be a Contracting Officer or an EXO.
3. Contracting Officers get a specific FPDS-NG user ID assigned to them. After registering at https://fpds.gov, an email will be sent to the agency administrator and/or the contracting office administrator. The administrator will verify and approve the request, then assign privileges to FPDS.
4. An A&A Specialist will be assigned the generic FPDS-NG user ID used by the agency.
5. Review the help files pertaining to your type of award on FPDS.gov here: https://www.fpds.gov/help/index.jsp

NOTE:

The contract type used in this manual is a Definitive Contract. Different contract types have different mandatory fields in FPDS-NG.

Please see the FPDS-NG help menu for:

- Creating a Delivery Order/Task Order
- Creating a Purchase Order
- Creating a Definitive Contract
- Creating an Indefinite Delivery Vehicle (Government Wide Acquisition Contract, Basic Ordering Agreements, Blanket Purchase Agreements and Indefinite Delivery contracts)

STEPS:

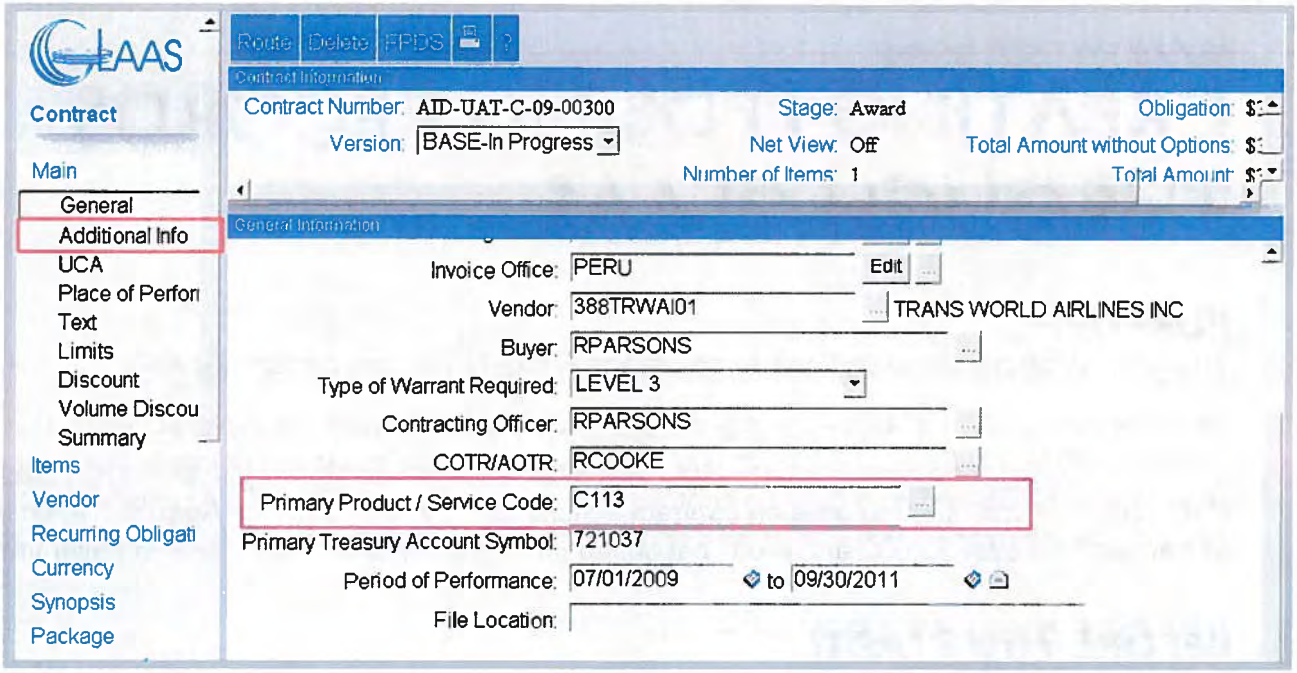


Figure 1: Main / General Screen

Steps	Section	User Action	Guidance
1.	Main / General	Verify the **Primary Product / Service Code**.	A Product / Service code is a four-digit code, maintained by General Services Administrations (GSA) that identifies the product or service. The codes are available by using the lookup button ( ). This field is mandatory for reporting procurement data to the Federal Procurement Data Center (FPDC).
2.	Main / General	Click the **Additional Info** link on the left-hand menu.	

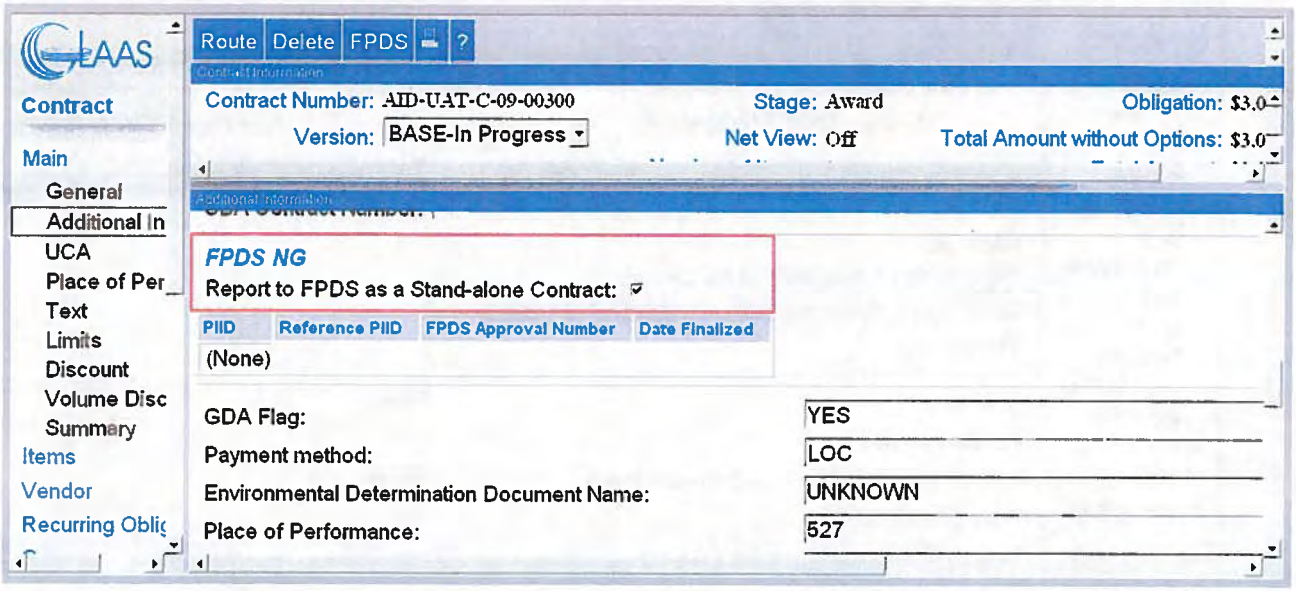


Figure 2: Main / Additional Info Screen

Steps	Section	User Action	Guidance
3.	Main / Additional Info	Verify the **Report to FPDS as a Stand-alone Contract** box is checked or unchecked depending on the type of contract you are working on.	GLAAS uses different instrument codes for different types of contracts: • "B" = Basic Ordering Agreement • "C" = Contract • "D" = Definite Quantity Contract • "I" = Indefinite Quantity Contract • "Q" = Requirements Contract • "S" = Personal Services Contract Always check the **Report to FPDS as a Stand-alone Contract** box for Personal Services Contracts (code "S") and Contracts (code "C"). Leave the **Report to FPDS as a Stand-alone Contract** box unchecked if the award is an Indefinite Delivery contract.

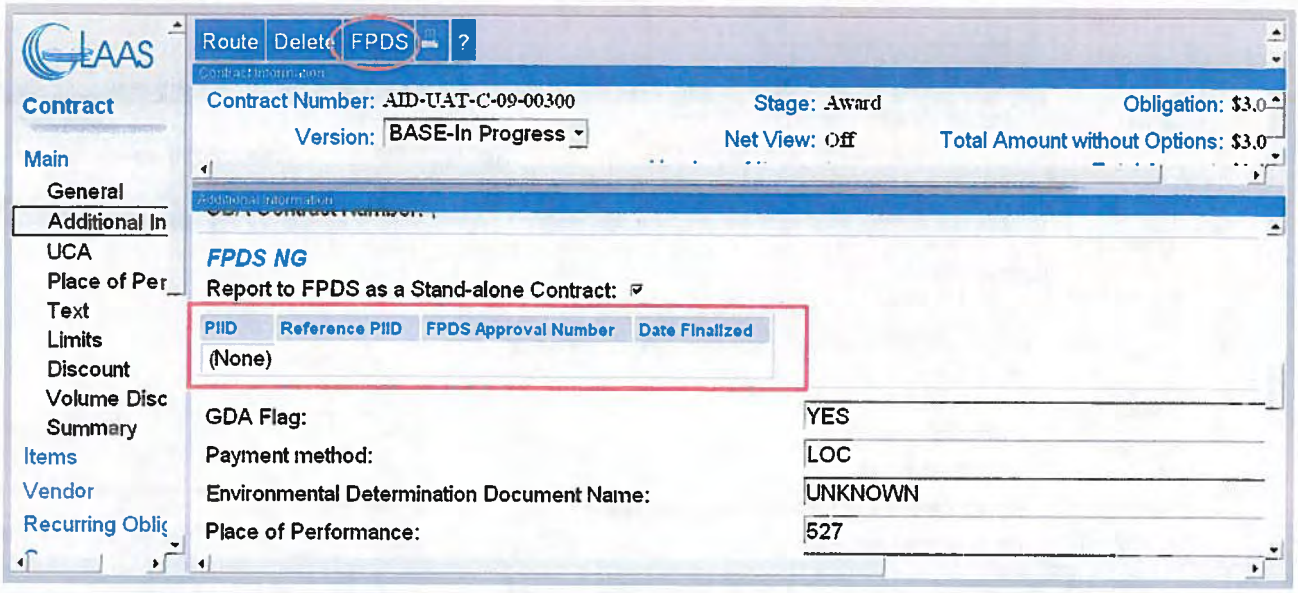


Figure 3: Main / Additional Info Screen

Steps	Section	User Action	Guidance
4.	Main / Additional Info	Click the **FPDS** toolbar button.	The **FPDS** toolbar button is available from any of the **Main** screens. The **Procurement Identifier** (**PIID**) is auto-generated by FPDS-NG. Once the system interfaces with FPDS-NG, the **PIID** number will auto-populate and a "**Clear PIID**" button will appear (not shown). The "**Clear PIID**" button (Clear PIID) will delete an in-progress FPDS-NG record. Once the FPDS-NG record has been approved, the **FPDS Approval Number** and **Date Finalized** will auto-populate.

New | Save Draft | Validate | Approve | Correct | Modify | Save Templ | Delete | Print | Help

Transaction Information

Award Type:	Definitive Contract	Prepared Date:	08/19/2009 12:23:25	Prepared User:	JENGEL@USAID.GOV
Award Status:	Draft	Last Modified Date:	08/19/2009 12:25:28	Last Modified User:	JENGEL@USAID.GOV

Document Information

	Agency	Procurement Identifier	Modification No	Trans No
Award ID:*	7200	AID527C0900016	0	0
Referenced IDV ID:				
Reason For Modification:				
Solicitation ID:	SOL-527-09-000009			

Dates

Date Signed (mm/dd/yyyy):*	08/19/2009
Effective Date (mm/dd/yyyy):*	08/19/2009
Completion Date (mm/dd/yyyy):*	12/31/2009
Est. Ultimate Completion Date (mm/dd/yyyy):*	12/31/2009

Amounts

Action Obligation:*	$1,000.00
Base And Exercised Options Value:*	$1,000.00
Base And All Options Value:*	$1,000.00
Fee Paid for Use of IDV:	$0.00

Purchaser Information

Contracting Office Agency ID:*	7200	Contracting Office Agency Name:	AGENCY FOR INTERNATIONAL DEVELOI
Contracting Office ID:*	72000	Contracting Office Name:	
Funding Agency ID:		Funding Agency Name:	
Funding Office ID:		Funding Office Name:	
Foreign Funding:*	Foreign Funds FMS	Reason For Inter-Agency Contracting:	Select One

Contractor Information

CCR Exception: PLEASE SELECT CCR EXCEPTION BY CLICKING THE ELLIPSIS (...) BUTTON | Remove Exception

DUNS No:*		Street:	
Contractor Name From Contract:*		Street2:	
Vendor Name:		City:	
		State:	Zip:

Figure 4: FPDS-NG Screen

Steps	Section	User Action	Guidance
5.	FPDS-NG	Scroll down to begin populating FPDS-NG with the required information.	The FPDS-NG window will launch in a separate browser window. Required fields are shown in orange with an asterisk (*) next to them. The required fields depend on the business rules for the type of award you are reporting. Use the FPDS-NG **Help** button to open a separate window that provides detailed guidance on the required fields for specific award types (not shown).

Transaction Information

Award Type:	Definitive Contract	Prepared Date:	08/19/2009 12:23:25	Prepared User:	JENGEL@USAID.GOV
Award Status:	Draft	Last Modified Date:	08/19/2009 12:25:28	Last Modified User:	JENGEL@USAID.GOV

Document Information

	Agency	Procurement Identifier	Modification No	Trans No
Award ID:*	7200	AID527C0900016	0	0
Referenced IDV ID:				
Reason For Modification:				
Solicitation ID:	SOL-527-09-000009			

Dates		Amounts	
Date Signed (mm/dd/yyyy):*	08/19/2009	Action Obligation:*	$1,000.00
Effective Date (mm/dd/yyyy):*	08/19/2009	Base And Exercised Options Value:*	$1,000.00
Completion Date (mm/dd/yyyy):*	12/31/2009	Base And All Options Value:*	$1,000.00
Est. Ultimate Completion Date (mm/dd/yyyy):*	12/31/2009	Fee Paid for Use of IDV:	$0.00

Purchaser Information

Figure 5: FPDS-NG Screen

Steps	Section	User Action	Guidance
6.	FPDS-NG / Transaction Information	Review **Transaction Information** for accuracy.	**Transaction Information** is based on information you entered in GLAAS.
7.	FPDS-NG / Document Information	Review **Document Information** for accuracy. Enter a reason for modification if this is a modification to the base award. Enter the **Solicitation ID** (if applicable).	The **Award ID** is pre-populated with USAID Agency Code "7200." The **Procurement Identifier** (PIID) is auto-generated by FPDS-NG and will appear on the **Main / Additional Info** screen of the GLAAS document. The **Solicitation ID** will be in the same format as FedBizOps: upper case, alpha and numeric only, with no embedded spaces or special characters.
8.	FPDS-NG / Dates	Review **Dates** information for accuracy and edit any fields that need to be updated.	Dates are populated from the information you entered in GLAAS.
9.	FPDS-NG / Amounts	Review **Amounts** information for accuracy.	Amount values are populated from the information you entered in GLAAS. Should the amounts display incorrectly, please contact the GLAAS Solutions Center (GLAAS_Support@usaid.gov)

Figure 6: FPDS-NG Screen

Steps	Section	User Action	Guidance
10.	FPDS-NG / Purchaser information	Enter or select "72000" for the **Contracting Office ID**.	The **Contracting Office ID** will always be "72000."
11.	FPDS-NG / Purchaser information	Select the appropriate value from the **Foreign Funding** dropdown list.	This field indicates that a foreign government, international organization or foreign military organization bears some of the cost of the acquisition. Specify "Foreign Funds FMS" if the funding comes from foreign military sales. Specify "Foreign Funds non-FMS" if a portion of the funding comes from foreign sources and other than military sales. Specify "Not Applicable" if there are no foreign funds.

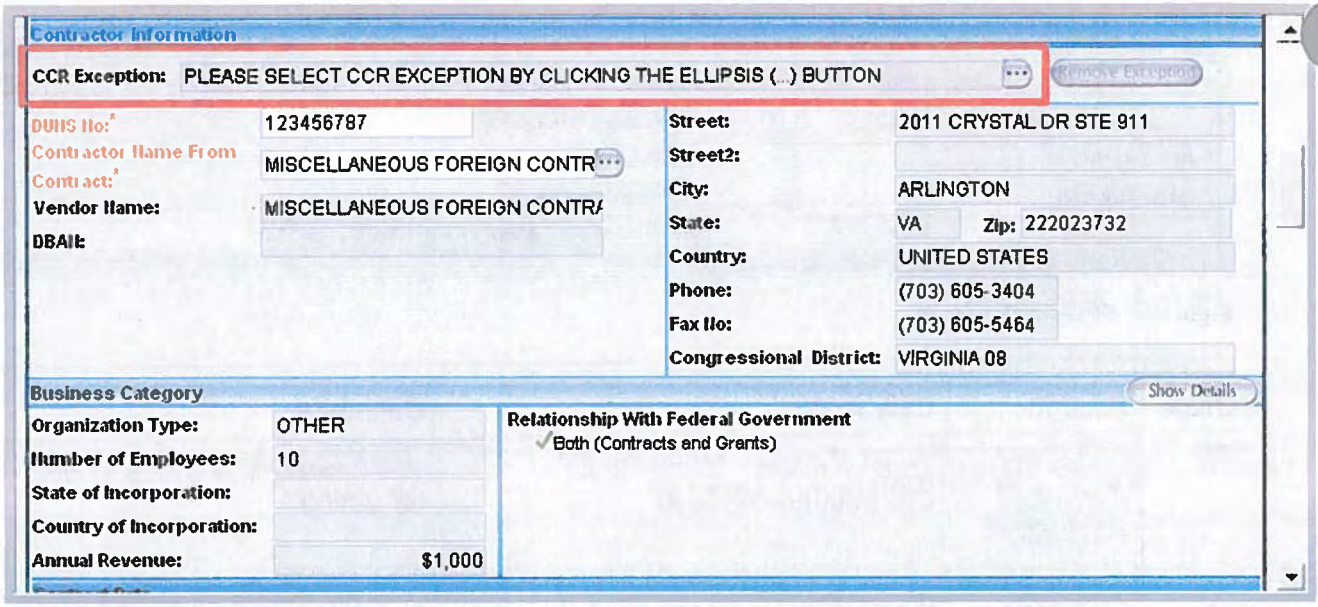


Figure 7: FPDS-NG Screen

Steps	Section	User Action	Guidance
12.	FPDS-NG / Contractor Information	Enter a **CCR Exception** when applicable.	All prospective vendors (including foreign vendors) must be registered in the Central Contractor Registry (CCR) database prior to award of a contract or agreement. You may enter a **CCR Exception** when applicable according to FAR 4.1102. Personal Service Contractors (PSCs) must NOT register in CCR. Carefully consider the security implications of requiring foreign vendors to register in CCR, and use the existing FAR 4.1102(a) (5) exception to requiring their registration where it is warranted. Use the **CCR Exception** "Classified contracts" when registration in the CCR database, or use of CCR data, could compromise the safeguarding of classified information or national security.

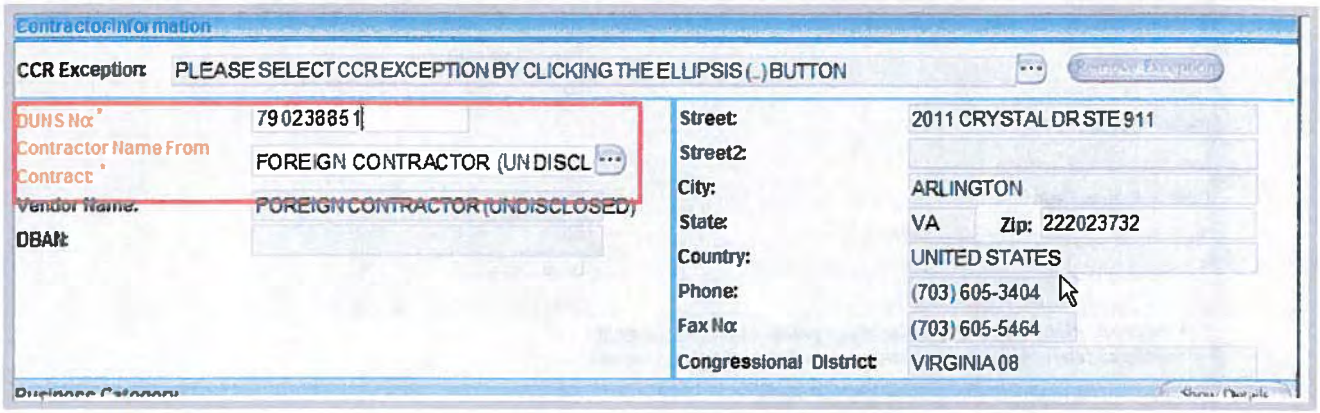


Figure 8: FPDS-NG Screen

Steps	Section	User Action	Guidance
13.	FPDS-NG / Contractor Information	Enter a **DUNS Number**.	All vendors doing business with the Federal Government must have a DUNS number. Use generic DUNS numbers only when appropriate. Please refer to AAPD 07-02 for guidance. If the work reported in the action is considered classified, or if revealing the vendor/contractor name may otherwise cause harm or impose a danger to the Mission or Contractor, use one of the following DUNS Numbers: • 790238638 Domestic Contractor (Undisclosed) • 790238851 Foreign Contractor (Undisclosed)
14.	FPDS-NG / Contractor Information	Verify the **Contractor Name From Contract.**	If JavaScript is turned on for your web browser, the **Contractor Name from Contract** and the vendor address information will auto-populate.

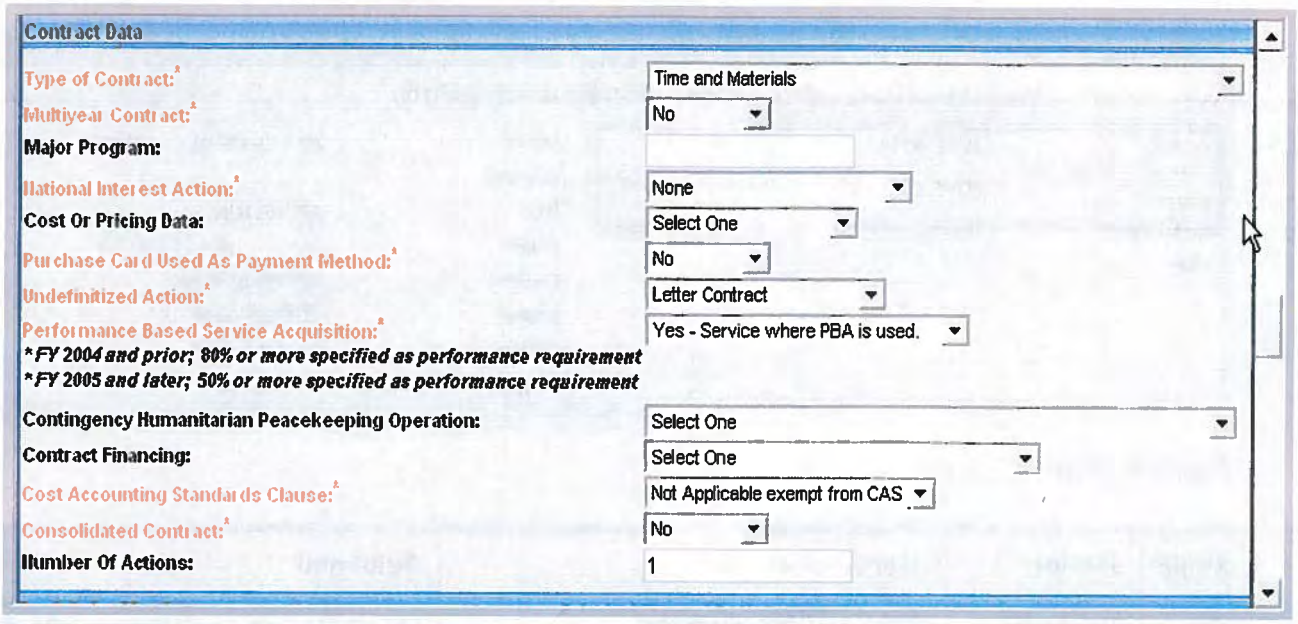


Figure 9: FPDS-NG Screen

Steps	Section	User Action	Guidance
15.	FPDS-NG / Contract Data	Select an appropriate value for each mandatory field in **Contract Data** based on the specifics of your contract.	Use the FPDS-NG Help Menu to correctly fill out the required fields.

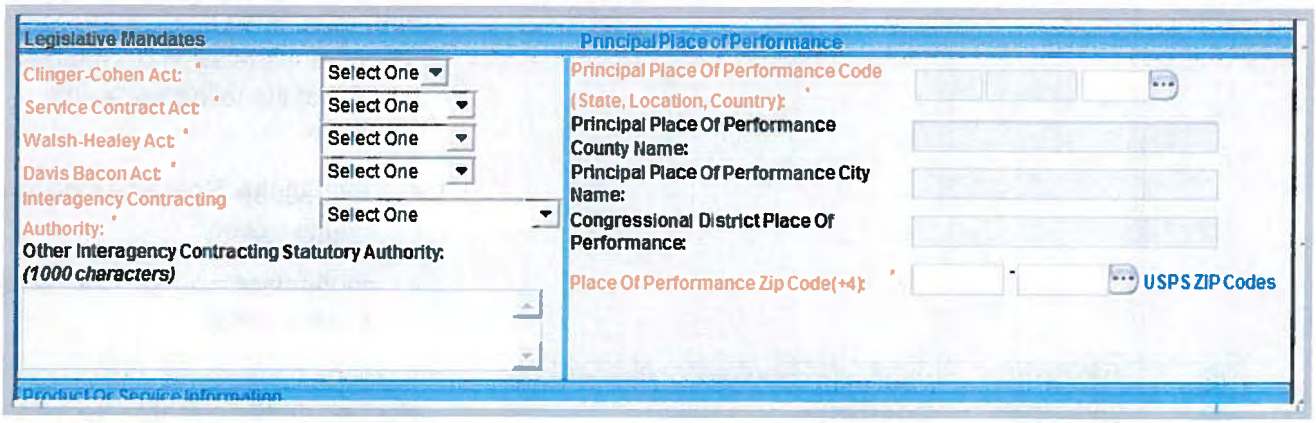


Figure 10: FPDS-NG Screen

Steps	Section	User Action	Guidance
16.	FPDS-NG / Legislative Mandates	Select an appropriate value for each mandatory field in **Legislative Mandates** based on the specifics of your contract.	

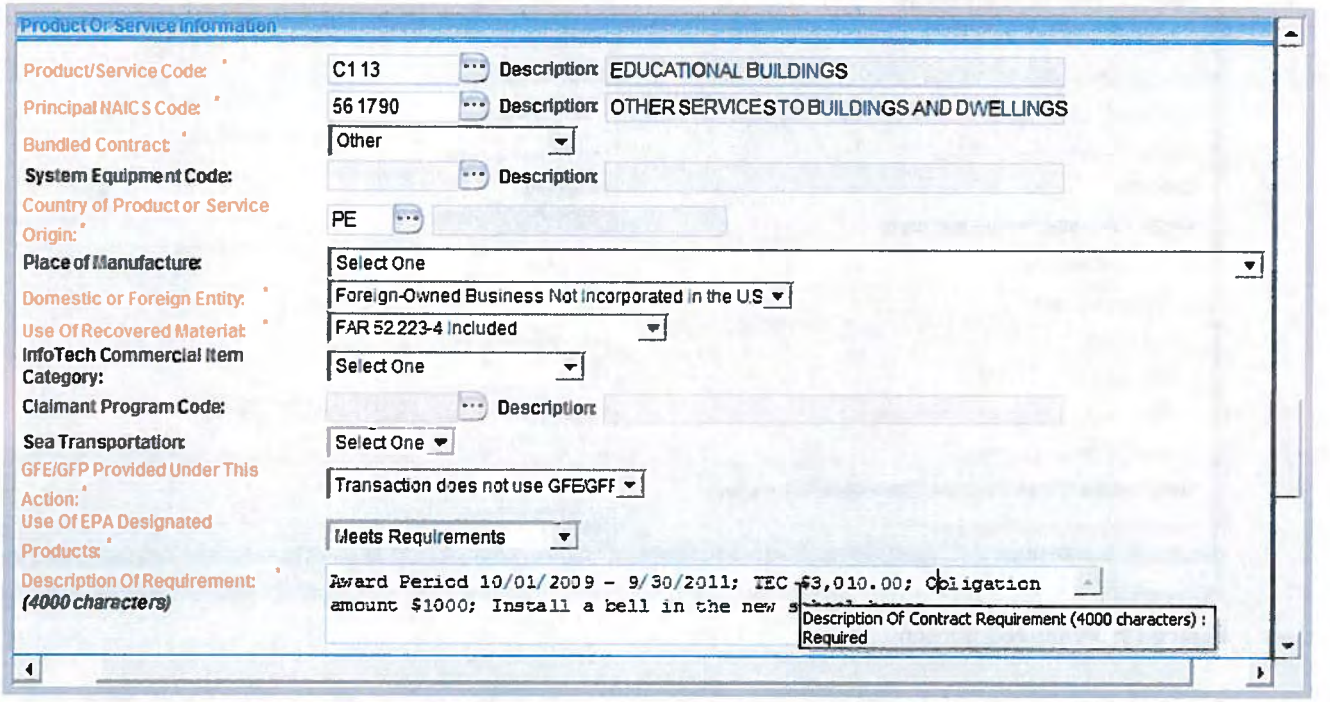


Figure 11: FPDS-NG Screen

Steps	Section	User Action	Guidance
17.	FPDS-NG / Product or Service Information	Select an appropriate value for each mandatory field in **Product or Service Information** based on the specifics of your contract.	**Product Service Code**, **Principal NAICS Code** and **Description Of Requirement** are auto-populated from GLAAS.

Competition Information

Extent Competed For Referenced IDV:

Extent Competed: Not Competed

Solicitation Procedures: Simplified Acquisition

Type Of Set Aside: No set aside used

Evaluated Preference: No Preference used

SBIR/STTR: Select One

Statutory Exception To Fair Opportunity: Select One

Reason Not Competed: Select One

Local Area Set Aside: No

FedBizOpps: Not Applicable

A76 Action: No

Commercial Item Acquisition Procedures: Supplies or services pursuant to FAR 12.102(f)

Number Of Offers Received: 4

Small Business Competitiveness Demonstration Program:

Commercial Item Test Program: No

Figure 12: FPDS-NG Screen

Steps	Section	User Action	Guidance
18.	FPDS-NG / Competition Information	Select an appropriate value for each mandatory field in **Competition Information** based on the specifics of your contract.	Use the FPDS-NG Help Menu to correctly fill out the required fields.

Preference Programs / Other Data

Contracting Officer's Business Size Selection: Small Business

Subcontract Plan: Plan Not Required

Price Evaluation Percent Difference: 0 %

Subcontract Plan : Required

Reason Not Awarded To Small Disadvantaged Business: Select One

Reason Not Awarded To Small Business: Select One

Figure 13: FPDS-NG Screen

Steps	Section	User Action	Guidance
19.	FPDS-NG / Preference Programs / Other Data	Select an appropriate value for each mandatory field in **Preference Programs / Other Data** based on the specifics of your contract.	Use the FPDS-NG Help Menu to correctly fill out the required fields.

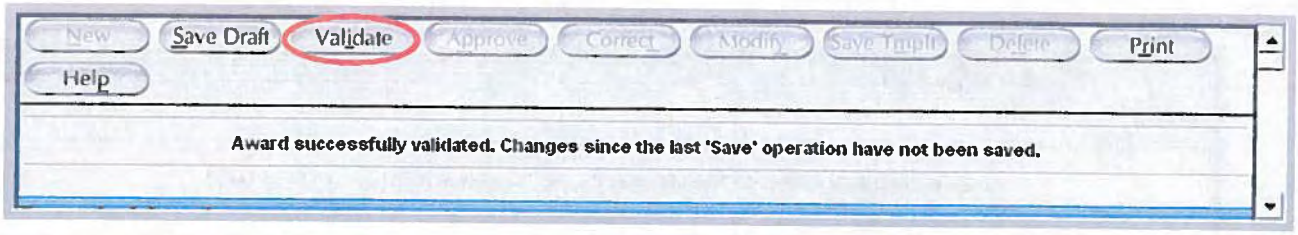


Figure 14: FPDS-NG Screen

Steps	Section	User Action	Guidance
20.	FPDS-NG	Click the **Validate** toolbar button.	Clicking the **Validate** toolbar button does not save any changes made to the FPDS-NG report.

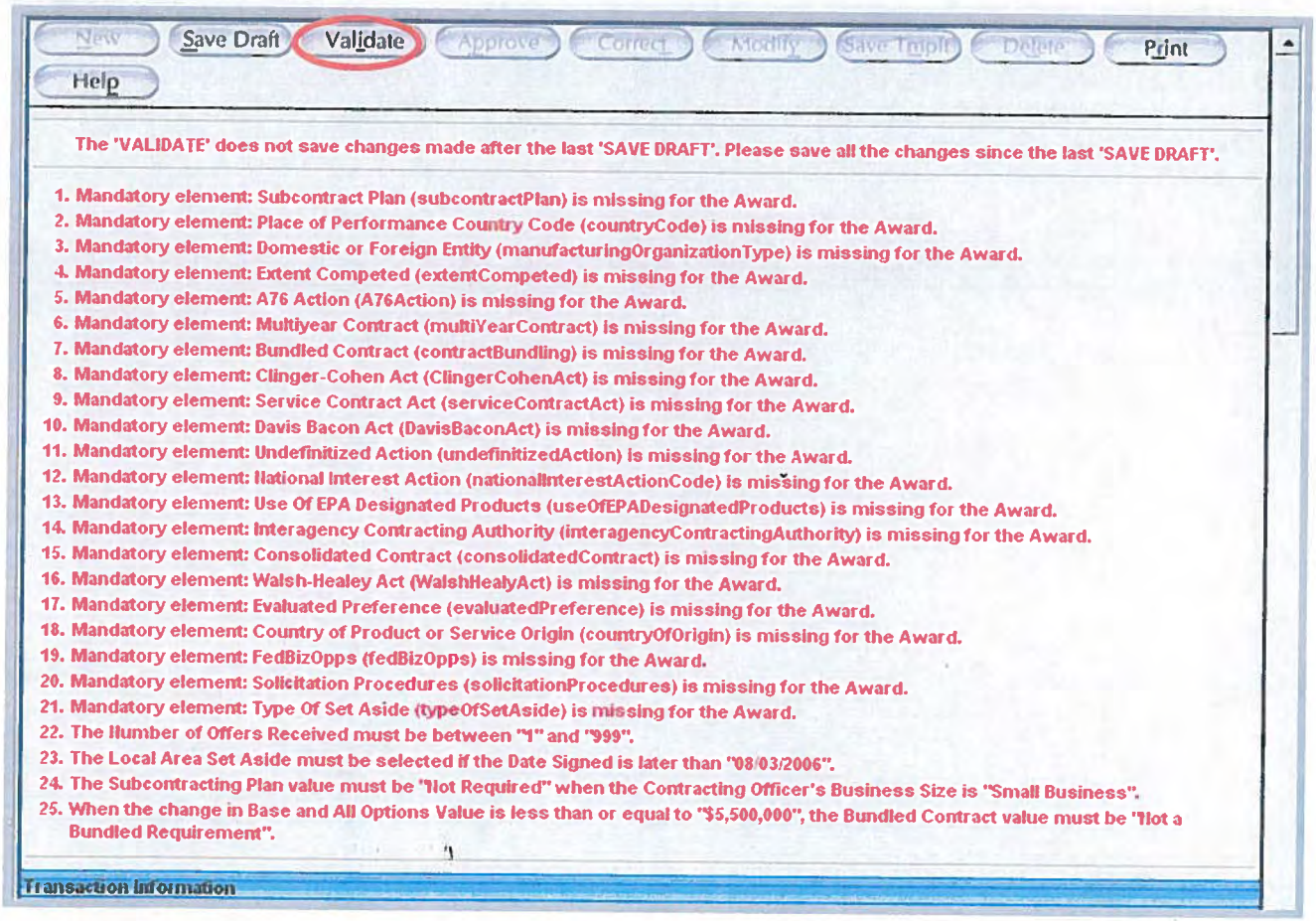


Figure 15: FPDS-NG Screen

Steps	Section	User Action	Guidance
21.	FPDS-NG	Correct any errors you may receive and then click the **Validate** toolbar again to re-validate the record.	Fields that require corrections will be shown in red throughout the FPDS-NG record.

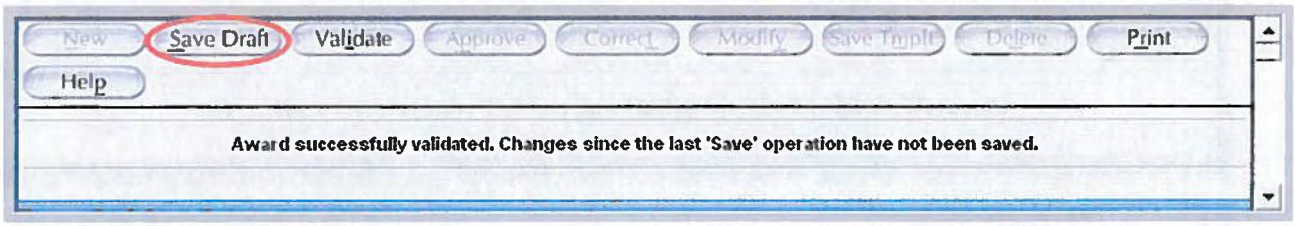


Figure 16: FPDS-NG Screen

Steps	Section	User Action	Guidance
22.	FPDS-NG	Click the **Save Draft** toolbar button.	
23.	FPDS-NG	Close the FPDS-NG browser window and go back to GLAAS.	

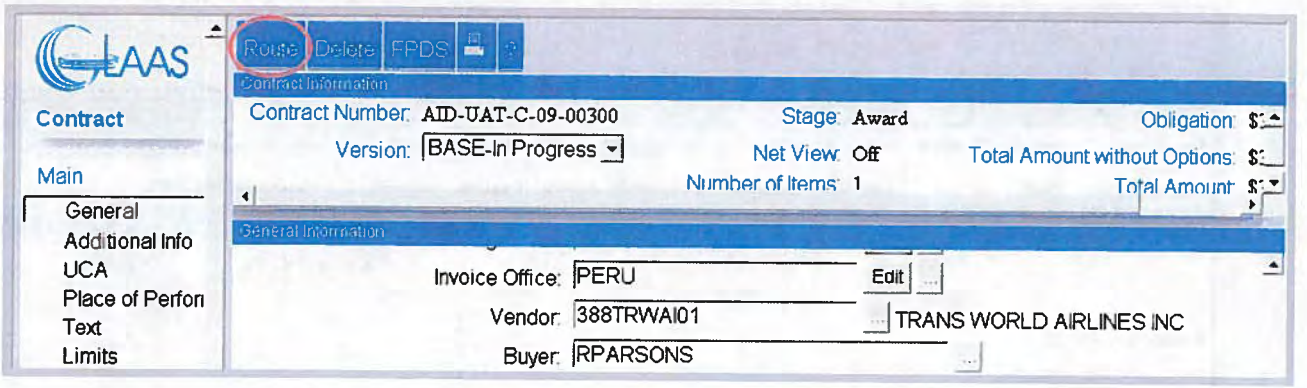


Figure 17: Main / General Screen

Steps	Section	User Action	Guidance
24.	Main / General	Click the **Route** toolbar button and route the document to the Contracting Officer (CO) for Approval.	The **Route** button allows the user to forward documents to other GLAAS users for review and approval. Refer to the *Routing a Document* user guide for further instructions.

STEPS FOR APPROVAL BY CONTRACTING OFFICER:

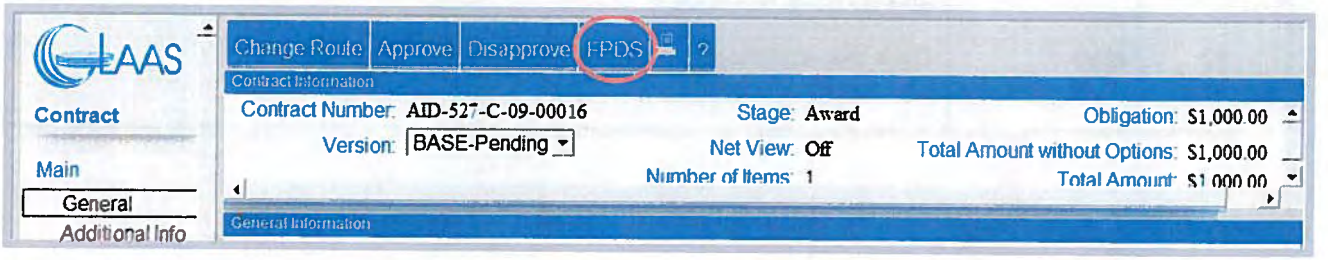


Figure 18: Main / General

Steps	Section	User Action	Guidance
25.	Main / General	Click the **FPDS** toolbar button.	The Contracting Officer will approve the FPDS-NG record before approving the GLAAS Document.

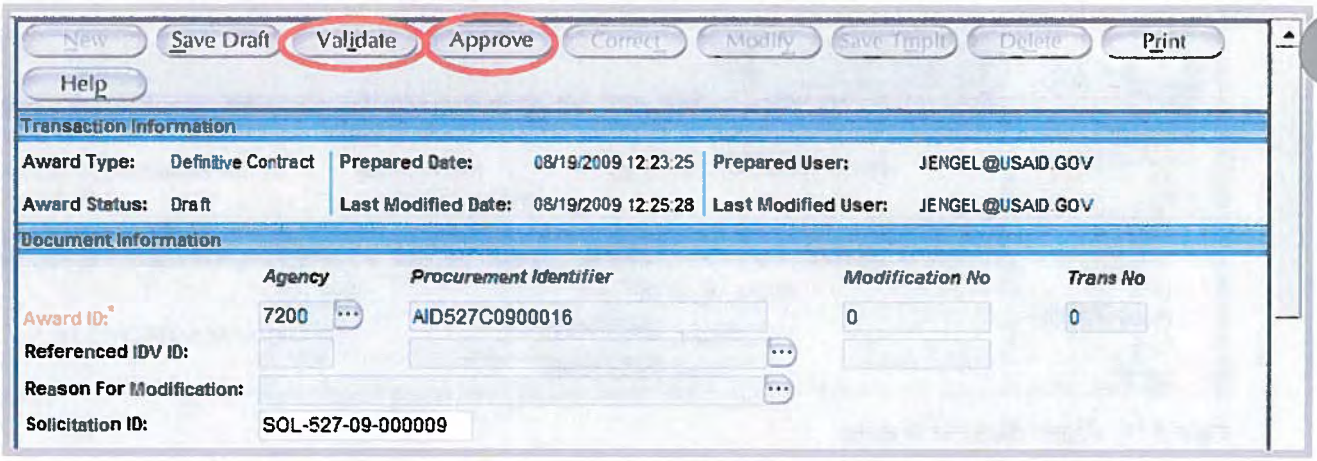


Figure 19: FPDS-NG Screen

Steps	Section	User Action	Guidance
26.	FPDS-NG	Review and **Validate** the FPDS-NG Record.	Fields that require corrections will be shown in red throughout the FPDS-NG record.
27.	FPDS-NG	Correct any errors you may receive and then click the **Validate** toolbar again to re-validate the record.	
28.	FPDS-NG	Click the **Approve** button	
29.	FPDS-NG	Close the FPDS-NG browser window and go back to GLAAS.	
30.	Main / General	Click the **Additional Info** link on the left-hand menu (not shown).	

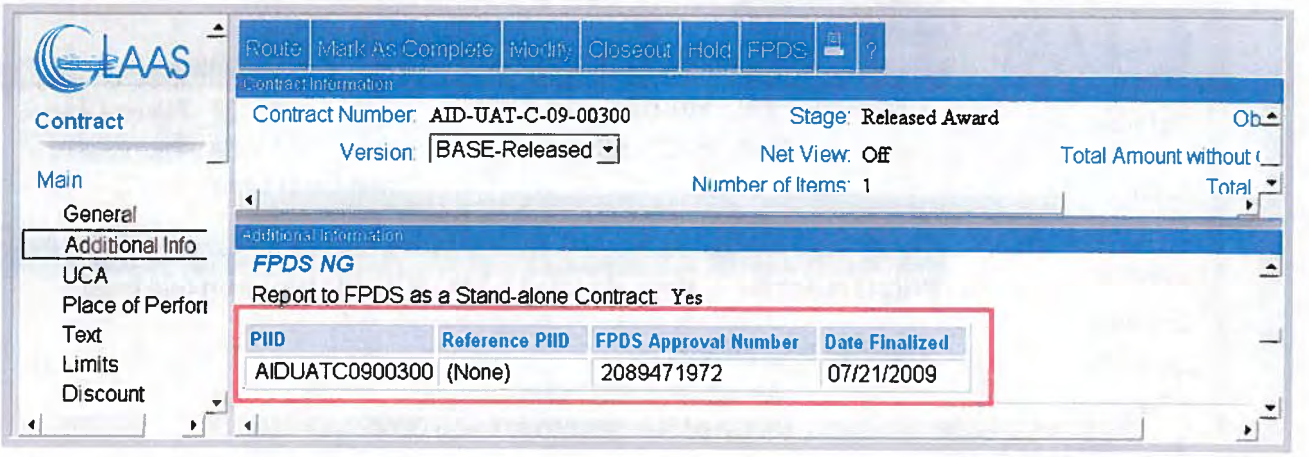


Figure 20: Main / Additional Info Screen

Steps	Section	User Action	Guidance
31.	Main / Additional Info	Note the **PIID**.	The **PIID** is generated by FPDS-NG and auto-populates once the system interfaces with FPDS-NG.
32.	Main / Additional Info	Note the **Reference PIID** (if any).	The **Reference PIID** refers to the PIID assigned to the Indefinite Delivery Vehicle. The reference PIID will auto-populate once the system interfaces with FPDS-NG.
33.	Main / Additional Info	Note the **FPDS Approval Number**.	The **FPDS Approval Number** and **Date Finalized** will only appear AFTER the award has been approved and released by the Contracting Officer (CO).
34.	Main / Additional Info	Click the **Review FPDS Record** link on the left-hand menu (not shown).	

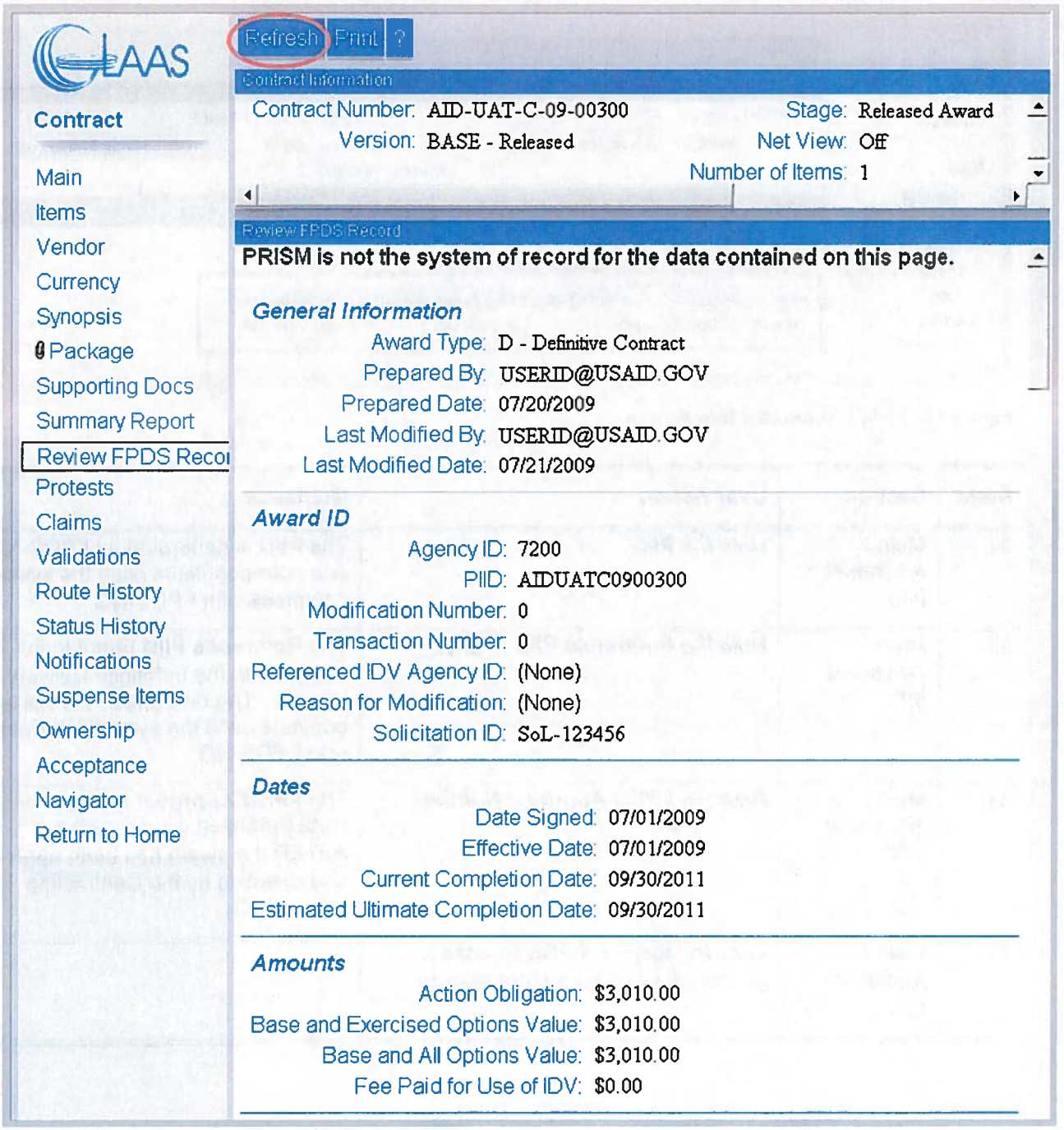


Figure 21: Review FPDS Record Screen

Steps	Section	User Action	Guidance
35.	Review FPDS Record	Click the **Refresh** toolbar button to populate the screen with the information you entered in FPDS-NG.	

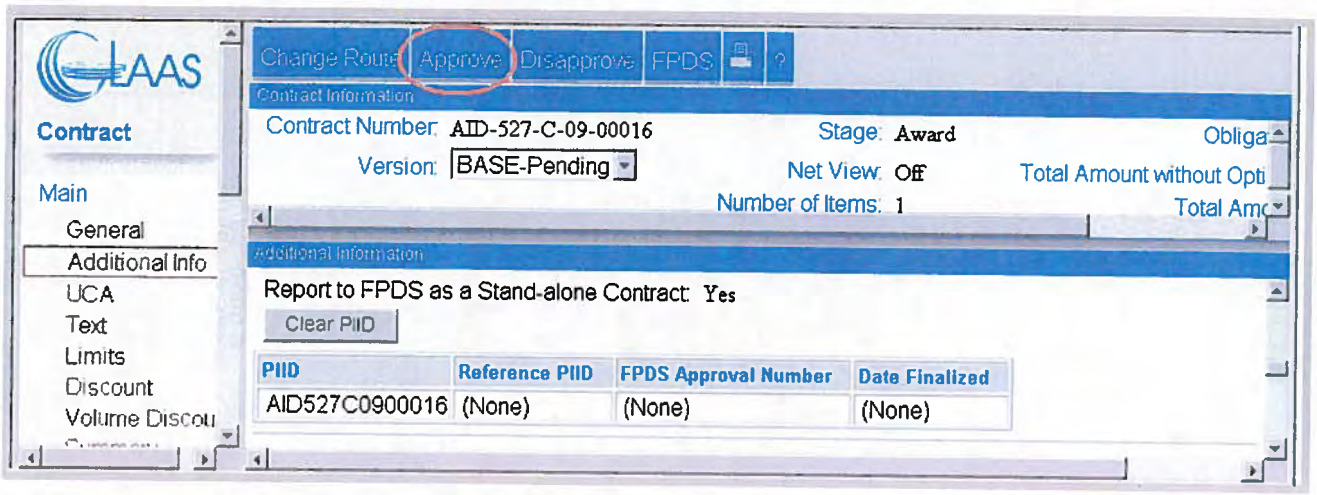


Figure 22: Main / Additional Info

Steps	Section	User Action	Guidance
36.	Review FPDS Record	Click the **Approve** toolbar button to approve the GLAAS document.	Please refer to the Approving an Award User Guide.

GLAAS 102 USER GUIDE:

CREATING FAADS/FAADS PLUS REPORTS IN GLAAS

PURPOSE:

This user guide will show you the Federal Assistance Award Data System (FAADS) and FAADS Plus features in GLAAS.

GLAAS generates the report for FAADS/FAADS Plus, a repository for all federal assistance data, maintained by the Department of Commerce Census Bureau and USAspending.gov. USAID is required to submit assistance award information to FAADS on a quarterly basis and FAADS Plus on a monthly basis for all awards to U.S. recipients. The FAADS/FAADS Plus report module can be accessed from within the grant document and is pre-populated with basic information from the document. The remaining data is entered by the user who then submits and saves the report.

A GLAAS system administrator collects the reports each quarter and emails the consolidated file to the Census Bureau.

In compliance with the Federal Funding Accountability and Transparency Act (FFATA), the GLAAS system administrator collects the FAADS Plus reports monthly and emails the data to USAspending.gov.

BEFORE YOU START:

1. In order to create the FAADS/FAADS Plus report, you must be an A&A Specialist or an Agreement Officer.
2. In order to submit a FAADS/FAADS Plus report, you must be an Agreement Officer.
3. Review the FAADS User Guide here: http://ftp2.census.gov/govs/faads/guide2008.pdf
4. Review the OMB Memo M-09-19 "Guidance on Data Submission under the Federal Funding Accountability and Transparency Act (FFATA)" here: http://www.whitehouse.gov/omb/assets/memoranda_fy2009/m09-19.pdf

STEPS:

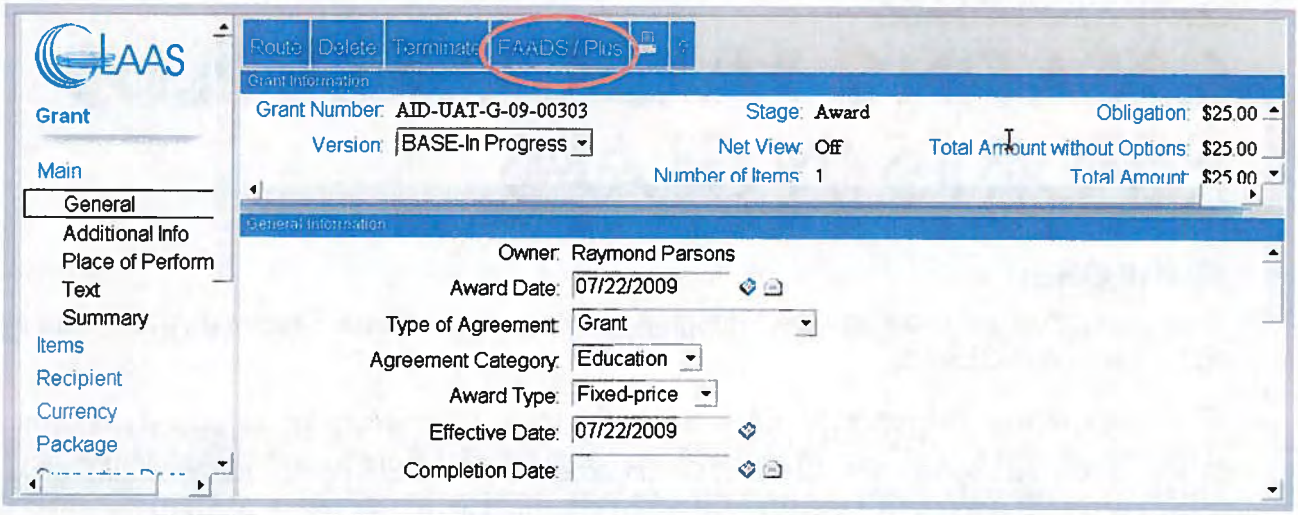


Figure 1: Welcome Screen

Steps	Section	User Action	Guidance
1.	GLAAS Sign On	Log onto GLAAS (not shown).	
2.	Welcome	Click the **Open** link on the **Access Panel** (not shown).	
3.	Document Open	Search for and select the award you are modifying (not shown).	When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
4.	Main / General	Click the **FAADS/Plus** toolbar button.	All assistance awards to U.S. recipients must be reported to FAADS. You may fill out the FAADS Plus form while a document has an "In Progress" status or a "Released" status.

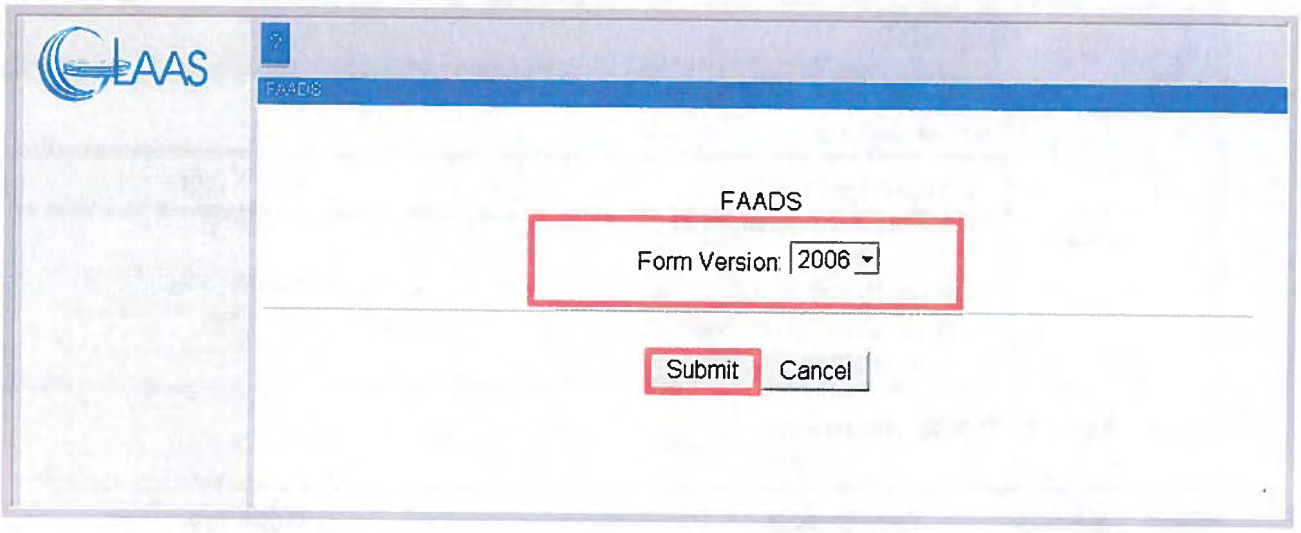


Figure 2: FAADS Screen

Steps	Section	User Action	Guidance
5.	FAADS	Click the **Submit** button to select the 2006 Form version.	

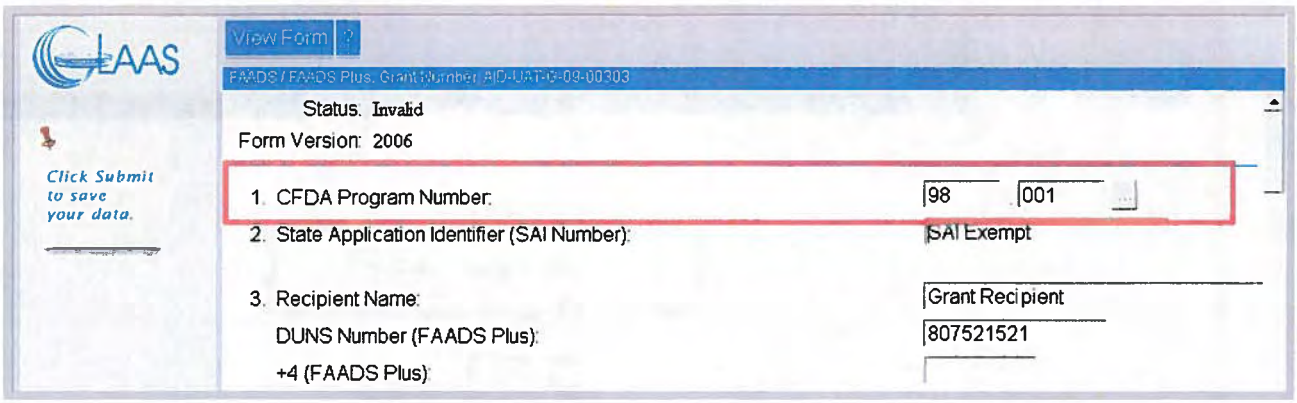


Figure 3: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
6.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields: **1. CFDA Program Number:** Click the lookup button (...) to search for the Catalog of Federal Domestic Assistance (CFDA) program number that applies to your grant. — R	USAID has 12 numbers in the Catalog of Federal Domestic Assistance (CFDA) but primarily uses "98.001" for "USAID Foreign Assistance for Programs Overseas."

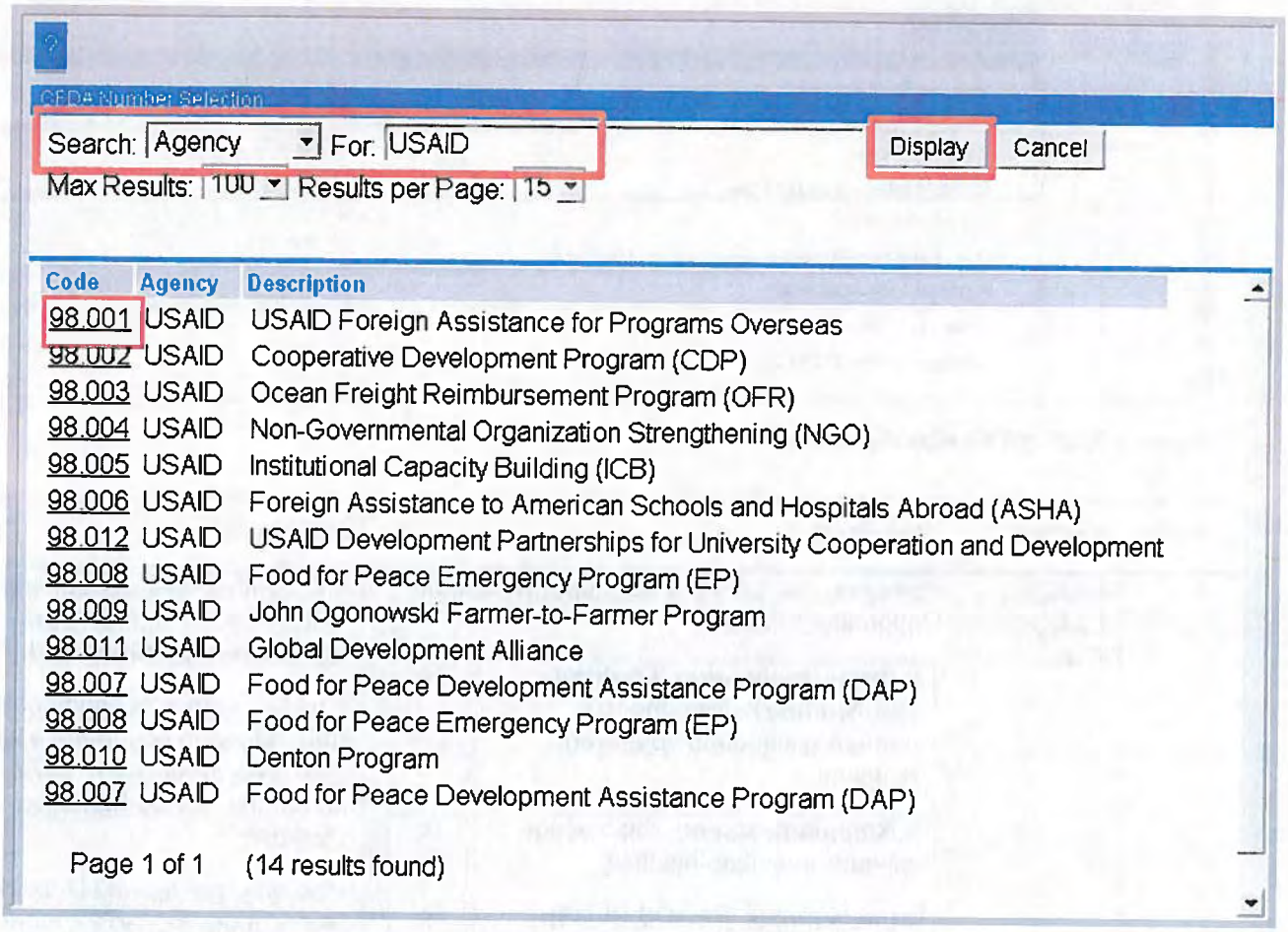


Figure 4: CFDA Number Selection Screen

Steps	Section	User Action	Guidance
7.	CFDA Number Selection	Select "Agency" in the **Search** field. Enter "USAID" in the **For** field. Click the **Display** button.	
8.	CFDA Number Selection	Select the appropriate **Code** for your program.	

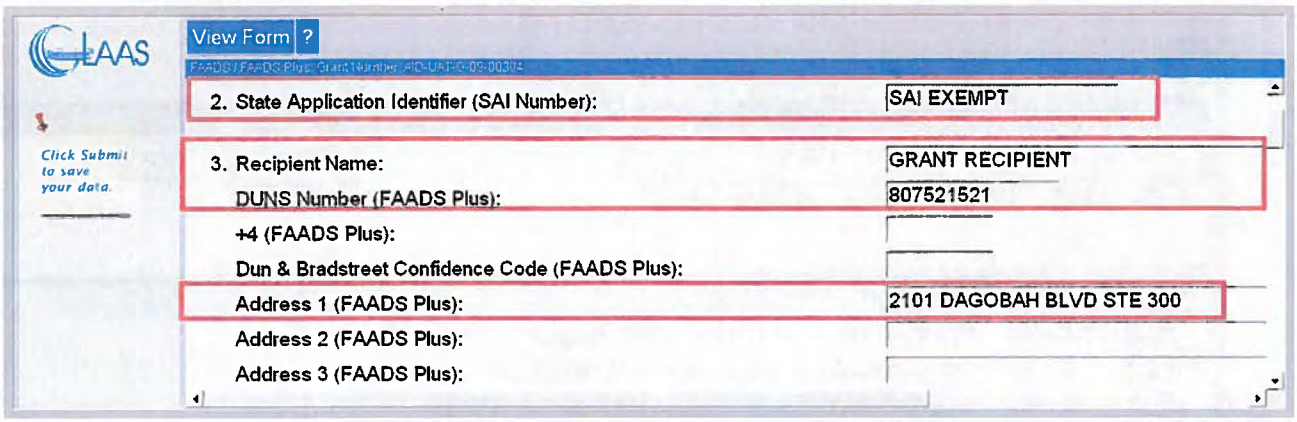


Figure 5: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
9.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields: **2. State Application Identifier (SAI Number):** Type the SAI number assigned to your grant recipient. — R **3. Recipient Name:** The system will auto-populate this field. — R **Duns Number (FAADS PLUS):** Enter the recipient's DUNS number. — R **+4 (FAADS Plus):** Enter the +4 digits if known. — O **Dun & Bradstreet Confidence Code (FAADS Plus):** Enter the confidence code if known. — O **Address 1 (FAADS Plus):** Verify the address. The system populates the address based on the DUNS number. — R	If no number is assigned, enter "SAI EXEMPT" in the **State Application Identifier** field. If the program is not subject to State review in accordance with Executive Order (EO) 12372 and no number is reported, enter "SAI EXEMPT." If the program is subject to State review under EO 12372 but for some reason the SAI is not available, enter "SAI NOT AVAILABLE." The DUNS+4 is a 4-character suffix for identifying alternative Electronic Funds Transfer (EFT) accounts.

Figure 6: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
10.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields: **4. Recipient City Code:** Click the lookup button (...) to locate the recipient's city code. — R	Once the city is selected, the **Recipient City Name**, **County Code**, **County Name** and **State Code** will be auto-populated.

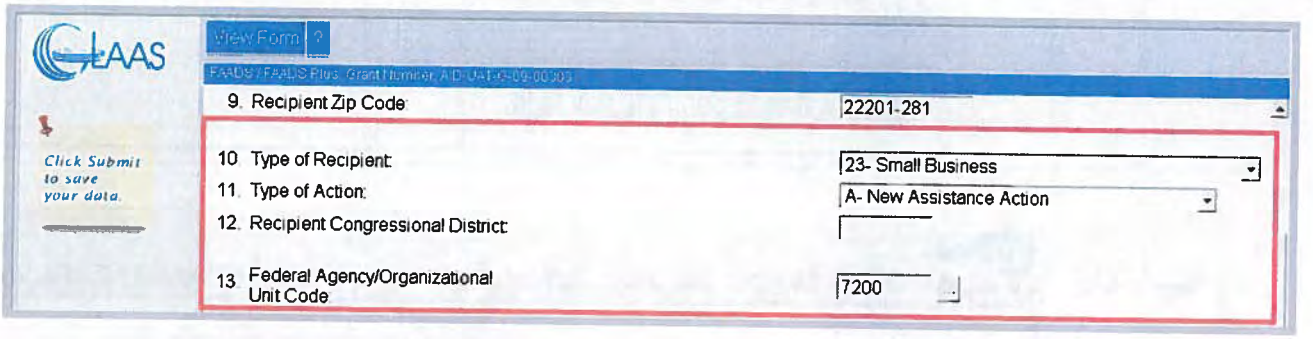


Figure 7: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
11.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields: **10. Type of Recipient:** Select the recipient code that best applies to the recipient of this grant action. — R **11. Type of Action:** Select the category that best describes this action. — R **12: Recipient Congressional District:** Enter the recipient's congressional district. — R **13: Federal Agency / Organizational Unit Code:** Enter "7200." — R	A link to the list of U.S. Congressional Districts can be found on the GLAAS **Welcome** screen. "7200" is the **Agency Code** for USAID.

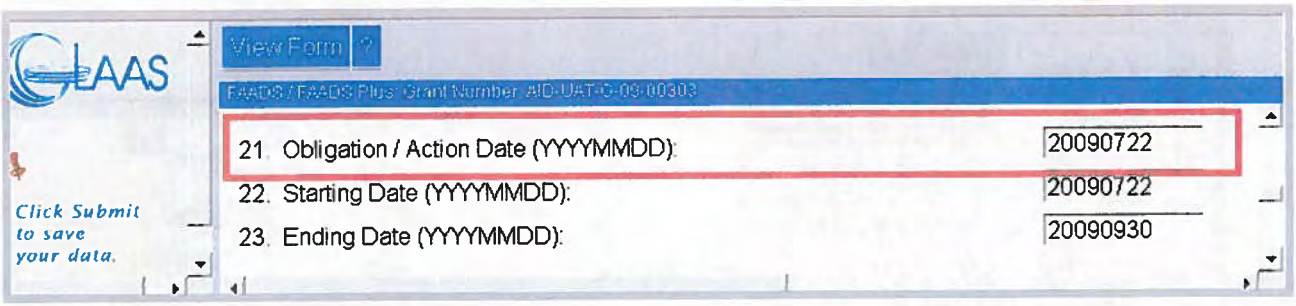


Figure 8: FAADS / FAADS Plus Screen

Steps	Section	User Action		Guidance
12.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields:		The **Starting Date** is the Effective Date of the award. The **Ending Date** is the Completion Date of the award.
		21. Obligation / Action Date (YYMMDD): The system will auto-populate this field.	R	
		22. Starting Date (YYYMMDD): The system will auto-populate this field.	O	
		23 Ending Date (YYYMMDD): The system will auto-populate this field.	O	

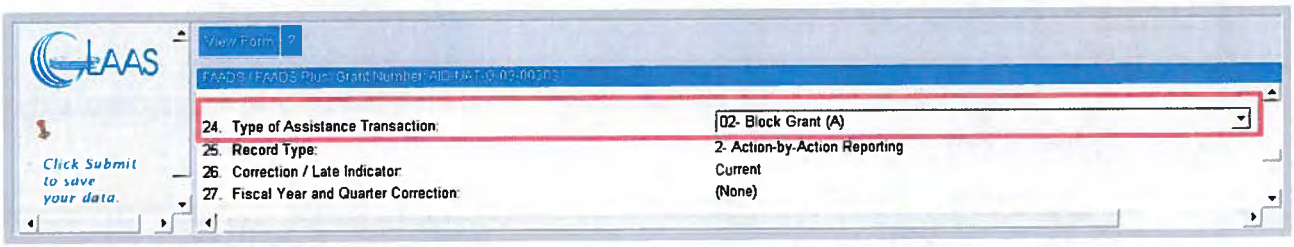


Figure 9: FAADS / FAADS Plus Screen

Steps	Section	User Action		Guidance
13.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields:		The alphabetic designation, at the end of each value in this field, refers to the type of assistance found in the Catalog of Federal Domestic Assistance (CFDA).
		24. Type of Assistance Transaction: Select the category that best describes this transaction.	R	

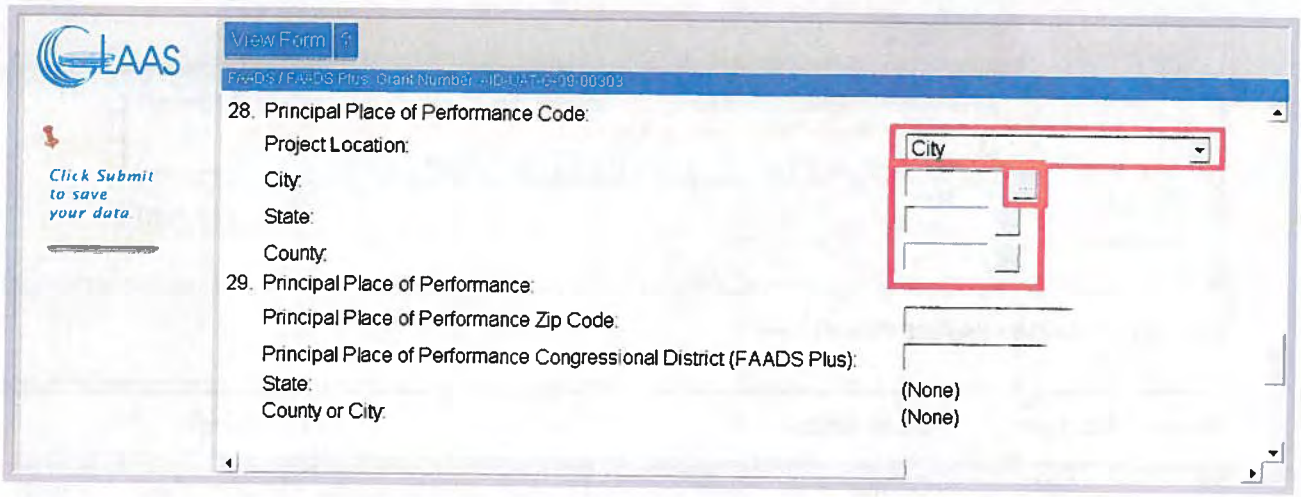


Figure 10: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
14.	FAADS / FAADS Plus	Select "City," "State," "County" or "Foreign Country" for the **Project Location.**	If you select "City" then the **City** lookup (...) button will be active. If you select "State" then the **State** lookup button (...) will be active. If you select "County" then the **County** Lookup button (...) will be active. If you select "Foreign Country," then none of the above lookup buttons (...) will be active.
15.	FAADS / FAADS Plus	Click the appropriate lookup button (...) and select the **City**, **State** or **County**.	Once the selection is made, the **City**, **State** and **County** will be auto-populated.

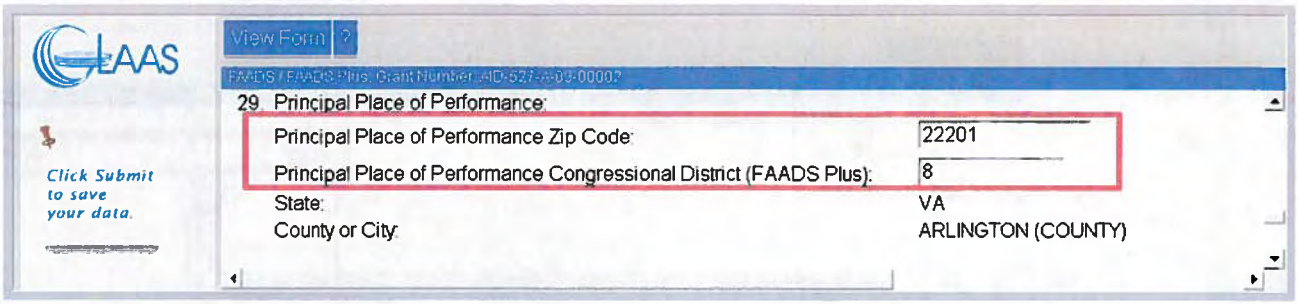


Figure 11: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
16.	FAADS / FAADS Plus	Complete the following Required (R) and/or Optional (O) fields: **29. Principal Place of Performance Zip Code:** Enter the appropriate Zip code. — R **30. Principle Place of Performance Congressional District (FAADS Plus):** Enter the Congressional District. — R	Principal Place of Performance Zip codes: • A "00" numeric code followed by five asterisks (*) indicates a multi-State project. • A "00" numeric code followed by "FORGN" in the next five positions indicates the place of performance is in a foreign country.

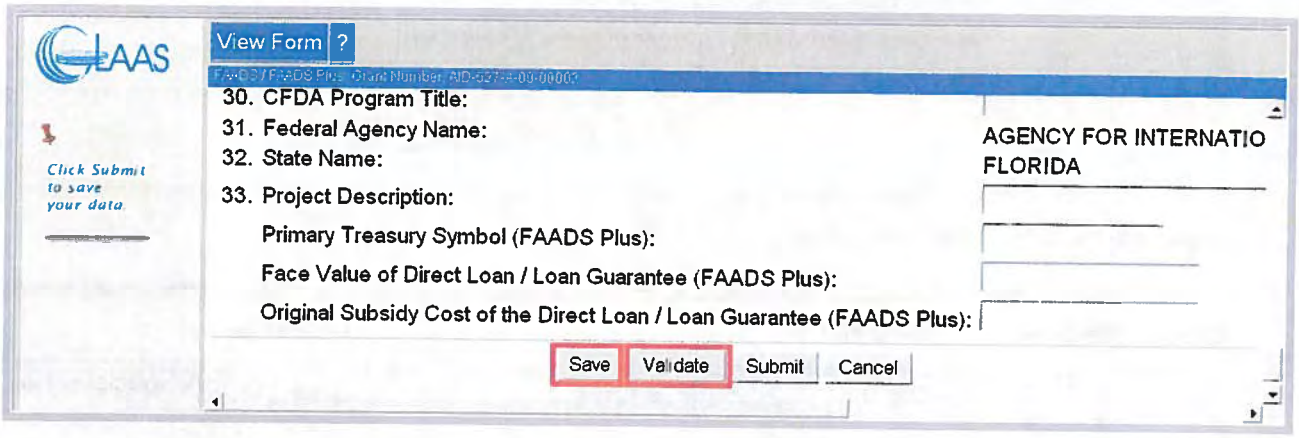


Figure 12: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
17.	FAADS / FAADS Plus	Click the **Validate** button.	
18.	FAADS / FAADS Plus	Correct any errors you may receive and then click the **Validate** button again to re-validate the record.	
19.	FAADS / FAADS Plus	Click the **Save** button.	The A&A Specialist will save the report. The Agreement Officer will then submit the report following the steps below.

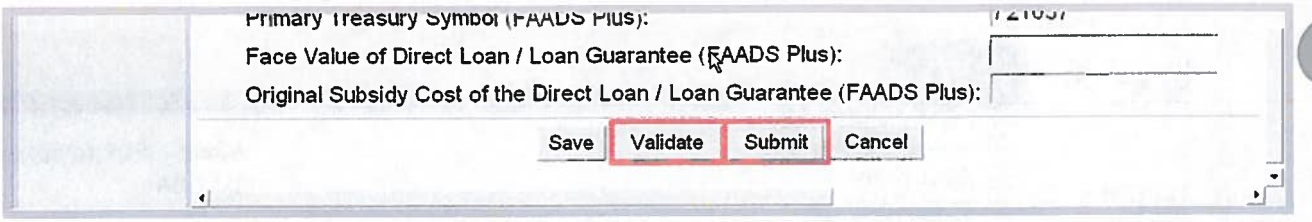


Figure 13: FAADS / FAADS Plus Screen

Steps	Section	User Action	Guidance
20.	GLAAS Sign On	Log onto GLAAS (not shown).	Once the A&A Specialist has saved the report, the Agreement Officer will login to submit the report.
21.	Welcome	Click the **Open** link on the **Access Panel** (not shown).	
22.	Document Open	Search for and select the award you are modifying (not shown).	When searching, you can use the percent sign (%) as a wildcard character to search for a partial number or name. Clear the **Site** field when searching for a document or a user.
23.	Main / General	Click the **FAADS/Plus** toolbar button (not shown).	
24.	FAADS / FAADS Plus	Click the **Validate** button.	
25.	FAADS / FAADS Plus	Correct any errors you may receive and then click the **Validate** button again to re-validate the record.	
26.	FAADS / FAADS Plus	Click the **Submit** button.	

United States Agency for International Development (USAID)

Bureau for Management/Office of the Chief Information Officer (M/OCIO)

Principal Resource for Information Management Enterprise-Wide (PRIME) 2.2

GLOBAL ACQUISITION & ASSISTANCE SYSTEM (GLAAS) MISSION USER ACCESS POLICIES AND FORMS PACKET

Version 3.0

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DOCUMENT CHANGE HISTORY

The table below identifies all changes that have been incorporated into this document. Baseline changes require review and approval.

Change #	Date	Version #	Description
N/A	December 11, 2006	1.0	Draft document provided to USAID/OAA for comments.
1	February 28, 2008	2.0	Updated/revised to reflect USAID/OAA client input.
2	November 7, 2008	3.0	Updated/revised to reflect new roles and role changes.

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1. GLAAS USER ACCESS POLICIES AND PROCEDURES

The purpose of this document is to provide central location for United States Agency for International Development (USAID) processes and forms required by Mission users who need access to the Global Acquisition & Assistance System (GLAAS). This document also contains information and the necessary forms needed for Phoenix access, which is interfaced with GLAAS for committing and obligating funds, as well as the necessary form required for obtaining access to Business Objects Enterprise (BOE) for generating reports outside of the GLAAS application. Access to the various E-Gov systems is also addressed in this document. All required forms mentioned can be found in Appendix C. Role descriptions for both GLAAS and Phoenix can be found in Appendix B.

1.1 ACCESS TO GLAAS

GLAAS contains sensitive information that must be acquired, maintained, and reported in a secure manner. The User Access policy for GLAAS has been designed with the intention of ensuring protection of procurement sensitive information from disclosure under the Procurement Integrity Act (41 U.S.C. §423, implemented at FAR 3.104) and other applicable federal laws including the Privacy Act of 1974. The Privacy Act of 1974 prevents the disclosure of any record (e.g., any information regarding an individual's address, phone number, social security number, bank account number) to any person or agency without the written consent of the individual to whom the record pertains.

Access to GLAAS is controlled through the use of an application-level user ID and password, which is assigned once a user is authorized. To safeguard this data from unauthorized access, Agency security policy requires that access be restricted to comply with the above-mentioned laws. Accordingly, the following is a list of categories of personnel who may be granted access to GLAAS:

- U.S. Direct Hires (USDH) – Agency-employed U.S. citizens that consist of civil service and Foreign Service employees appointed under statutory authorities.
- Foreign Service National (FSN) Direct Hires – Non-U.S. citizen employees appointed under the authority of the Foreign Affairs Act of 1961.
- U.S. Personal Services Contractors (PSCs) – One of the primary sources of specialized assistance available to managers in designing and implementing development assistance programs and in providing administrative support.
- FSN PSCs – Foreign national PSCs employed by USAID.
- Third Country National (TCN) PSCs – Expatriate foreign nationals who are employed by USAID in a third country (a country other than the U.S. or the individual's country of origin), and who are employed under a personal services contract.
- Participating Agency Service Agreement (PASA); Participating Agency Program Agreement (PAPA); and Resource Support Service Agreement (RSSA) USDHs from other Agencies – PASAs, PAPAs and RSSAs are agreements between United States Government (USG) agencies that form the basis for detailing personnel.

- Detail-Ins from another Federal Agency – USDH employees detailed from other agencies.
- Technical Advisors in Aids, Child Survival and Population (TAACs) from another Federal Agency – Program-funded technical specialists who may be assigned direct hire duties and responsibilities.
- Presidential Management Fellows (PMFs) – A civil service program run by the Office of Personnel Management (OPM) that allows talented young professionals to work in USAID.
- Intern Investment Program – A new structured summer program that allows the Agency to identify candidates for the Foreign Service International Development Intern program.
- New Entry Professional (NEP) Program – USAID's program for bringing well-qualified applicants into the Agency's Foreign Service.

The following is a list of those personnel categories that will not normally be granted access to GLAAS because of the need to safeguard procurement sensitive information from non-government sources:

- All Fellows including, but not limited to, the following:
  - American Academy for the Advancement of Science (AAAS) Fellows
  - Population Fellows (POFP)
  - Stars Fellows
  - Joint Career Corps (JCC)
  - Public Health Institute (PHI)
- Intergovernmental Personnel Act (IPA)
- Institutional Contractors
- Short-term Purchase Order individuals

1.2 WAIVERS

Should the person requesting access to GLAAS fall into one of the non-approved personnel categories listed above, they must obtain a waiver. Requesting individuals should complete the *Approval Form for Access to GLAAS Production for Non-Authorized Users (Waiver)* and *Non-Disclosure Agreement for GLAAS Access (Waiver)* (see Appendix C). The waiver will be granted subject to the final approval of the GLAAS Information Systems Security Officer (ISSO) and the Executive Sponsor of GLAAS. The signing official attests that he/she has weighed carefully the risks of granting GLAAS access to the person requesting it, and that the waiver is acceptable, resulting from significant operational necessity.

1.3 USER ACCOUNT ACCESS AND ROLES REQUESTS

Requests for *account creation, role changes,* and *site access* will be made as described in this section.

1.3.1 Account Creation

All GLAAS User Access requests are submitted to the Regional/Mission Subject Matter Expert (SME).

The *USAID GLAAS Access Agreement* must be signed by the user and the user's supervisor. The SME will complete the *GLAAS User Access/Roles Request Form* based on the request received from the supervisor.

Once a request has been received, the SME reviews the GLAAS User role descriptions matrix (see Appendix B) to assist him/her in assigning or changing roles. In addition, he/she must ensure that there are no conflicting role assignments and that the segregation of duties is maintained (i.e., a user cannot be assigned both the Program Manager (PM) and the Agreement Officer(AO)/Contracting Officer (CO)/Obligation Recorder (OR)/Purchase Card Holder (PCH) roles). Also, a user should not serve as agreement officer, contracting officer and a Cognizant Technical Officer (CTO) on the same action.

The SME also verifies compliance of the request with access policies and then routes the completed package to the Management Bureau/Office of Acquisition and Assistance (M/OAA) System Administrator via e-mail to M.OAA_Solution_Center (Adobe PDF format) or via fax to (202) 216-3143.

Once the forms are received, the M/OAA System Administrator will create user accounts in GLAAS based on the received request form and signed documents. A GLAAS user ID will be created based on the user's e-mail address (e.g., e-mail address:cagreen@usaid.gov – GLAAS user ID: cagreen).

Copies of all forms collected will be maintained by the GLAAS Information Systems Security Officer (ISSO) in Washington.

Note: First-time GLAAS users are required to complete all of the applicable forms and read the *USAID Rules of Behavior for Users*. User IDs and passwords will be issued only to those users who have had GLAAS Training in at least one of the training modules that matches their function(s) indicated on the role section of the *GLAAS User Access/Role Request Form*. Validation of the user's training should be done by the Site/OAA administrator prior to creating a user account.

1.3.2 Cognizant Technical Officer (CTO) Role Assignment

For users requesting the CTO role, the user must complete the on-line accruals course referenced in the General notice date 10/03/2007 before the role will be assigned. When possible, a copy of the course certificate and a valid copy of the user's CTO certification should be given to the SME before the role is assigned. The document should be included with the request submitted by the SME to OAA.

1.3.3 Warrants Levels/Credit Card Thresholds

Users requesting the AO, CO, OR or PCH role, the user must be sure to provide to his/her SME the warrant level, amount and/or Purchase Card threshold. The information will be validated with the M/OAA Evaluation Office by the ISSO.

1.4 GLAAS ROLE, DOCUMENT AND SITE ACCESS CHANGES/ADDITIONS

Users requesting changes/additional roles and/or document/site access must submit a request to the SME. The SME must send an e-mail to the M/OAA System Administrator (moaasolutioncenter@usaid.gov) requesting the needed access based on the request received from the individual's supervisor. OAA will file a copy of the e-mail request with the user's access forms.

1.5 DEACTIVATE GLAAS USER ACCOUNTS

GLAAS user accounts will be deactivated for the following reasons:

- User separation from USAID.
- User has received a new password that has not been used within 3 days of issuance.
- User fails to log into the system after 90 days.
- User participated in an event or demonstrated a pattern of behavior that suggests an unwillingness or inability on the part of the user to protect sensitive or classified information.

Users and supervisors must contact their Mission SME concerning any user account changes. The SME must then submit an e-mail request to the M/OAA Solutions Center. User access privileges will be revoked within 2 days of the user's departure or when the determination has been made that a user no longer requires access to GLAAS.

1.6 TRANSFERRING GLAAS USERS

The user contacts their SME via e-mail about their transfer prior to leaving. The Mission user's SME at the current location contacts the M/OAA System Administrator within two days of the departure date so the GLAAS user account can be deactivated. On arrival, the SME at the new location will complete the *GLAAS User Access/Roles Request Form* and send (via fax or e-mail) the forms to the M/OAA System Administrator. The M/OAA System Administrator updates the user's information in the system.

1.7 PASSWORD RESET REQUESTS

All SMEs will be given the rights to process resets in the system for their given location. The SME should receive a formal request and the user should present a picture ID to the Mission SME for verification in order for a password to be reset. The SME will reset the user's password(s), notify the user via E-mail that the password has been reset, and provide the new password to the user via telephone.

1.8 TEMPORARY SYSTEM/SITE ACCESS

Users on travel to sites outside of their home site must contact the SME at the temporary duty travel (TDY) location for access. The SME must follow the same process for receiving account access for the TDY user except that a new user ID will not be created. The user will be given access to the TDY site.

Note: When completing the *GLAAS User Access/Roles Request Form*, the SME must list the duration for the TDY access. Once the TDY is complete, the user's TDY site access will be removed.

1.9 USER ACCESS AND ROLES VALIDATIONS

Role assignments in GLAAS equate to access rights to manipulate (create/update/delete) or read data for which a given user has authority, responsibility and/or accountability. These transactions must be done by the party who has the responsibility for, accountability of, and authority to conduct those transactions. Obviously, Agency managers are responsible and accountable for authorities they delegate. Therefore, GLAAS roles must be carefully reviewed prior to assignment and should not be expeditiously requested.

For the reasons stated above, Mission Directors have ultimate responsibility for GLAAS User Access and role assignments within their respective Missions. To this end, Mission Directors are strongly encouraged to review all users and assigned roles on at least a quarterly basis to ensure that roles and user IDs are current and valid for each user.

Violation of the above policy shall be enforced by penalties ranging from, but not limited to, an official reprimand, and permanent documentation of said reprimand, to permanent dismissal from USAID employment. Violations related to GLAAS security will be immediately reported to the USAID's Inspector General's Office.

SMEs, however, should review the information on a monthly basis. Each month a report will be distributed via e-mail to each SME for review and validation of all users and their respective roles.

The reports should be reviewed for any changes, adjustments, or deletions. SMEs must review and submit to the M/OAA System Administrator via e-mail any changes within five (5) days of receipt of the report.

1.10 REQUIRED FORMS FOR GLAAS SYSTEM ACCESS

The following forms, which are required for GLAAS system access, are included in Appendix C:

- USAID GLAAS Access Agreement
- GLAAS User Access/Roles Request Form
- Approval Form For Access to GLAAS Production for Non-Authorized Users (Waiver)
- Non-Disclosure Agreement for GLAAS Access (Waiver)

2. PHOENIX SYSTEM ACCESS PROCEDURES

Various roles in GLAAS require a corresponding Phoenix role to complete the financial interface required for various GLAAS processes. See the role descriptions for additional information about Phoenix roles. The M/OAA System Administrator will coordinate with Phoenix security (if necessary).

The signed *Phoenix Access Request Acknowledgement* form and *GLAAS User Access/Roles Request Form* should be submitted to the M/OAA System Administrators via e-mail and fax. The M/OAA Administrators will coordinate with the Phoenix Security Team to create, update, or deactivate Phoenix user accounts via e-mail. Once a Phoenix user account has been created, updated, or deactivated, the Phoenix Security Team will notify the M/OAA System Administrator. The M/OAA System Administrator will contact the user with a courtesy copy sent to the user's supervisor and Site Administrator.

The *GLAAS User Access/Roles Request* form is also required for Phoenix role changes.

Note: Phoenix user accounts are maintained by the Phoenix Security Team located in USAID Washington. The current process for obtaining Phoenix user accounts is followed, however as mentioned above, the *Phoenix Access Request Acknowledgement* form and *GLAAS User Access/Roles Request Form* provided in Appendix C must be used for GLAAS.

3. OTHER SYSTEM ACCESS

Users of GLAAS may require access to other systems during day-to-day operations. The following information is provided to assist users if they need to gain access to one of these systems.

3.1 E-GOV SYSTEM ACCESS

Each of the following E-Gov systems has an online self-registration process. Users needing accounts for any of these systems should refer to the M/OAA Solutions Center website for additional information (http://inside.usaid.gov/M/OAA/SolutionsCenter/egov/index.html):

- FedBizOpps (FBO) – http://inside.usaid.gov/M/OAA/SolutionsCenter/egov/fedbizopps.html
- Grants.gov – http://inside.usaid.gov/M/OAA/SolutionsCenter/egov/grants.html
- Contractor Performance System (CPS) – http://inside.usaid.gov/M/OAA/SolutionsCenter/pastperf/cps_perf.html
- Past Performance Information Retrieval System (PPRIS) – http://www.ppirs.gov/
- Electronic Subcontracting Reporting System (eSRS) – www.esrs.gov

Note: Federal Procurement Data System-Next Generation (FPDS-NG)—USAID negotiators will use one standard user account to access FPDS-NG. However, COs will need to have a user ID and password assigned. User IDs will be set up for the CO when the initial request is made for system access to GLAAS.

3.2 BUSINESS OBJECTS ENTERPRISE ACCESS (EXTERNAL REPORTING)

Users needing access to the external reporting tool should complete the *Business Objects Enterprise Access Form* and submit the form to their SME. The SME will forward the form via e-mail to the IRM-Helpdesk-USAID with the stated approval in the body of the e-mail.

Note: BOE user accounts are maintained by the BOE Administrator located at USAID Washington.

4. GLAAS MISSION USER PROCESS AND CHECKLISTS

SMEs at each of the Mission sites will be the first point of contact (POC) for GLAAS users at a Mission for user access-related requests.

The M/OAA System Administrator is responsible for creating, maintaining, and deactivating GLAAS user accounts. Maintaining user accounts also includes updating user roles, and updating user site access and document sharing privileges.

The following checklists are used for completing the requested task(s) associated with access to the GLAAS system:

- GLAAS – New User Account Checklist
- GLAAS – Deactivate User Account Checklist (USAID/Mission)
- GLAAS – User Account Transfer Checklist
- GLAAS – User Account Password Reset Checklist

Table 4-1 identifies the forms that are associated with each checklist. These checklists are described in more detail in the sections that follow. The forms referenced in this section can be found in Appendix C.

Table 4-1. USAID/Mission Checklist/Form Matrix

Checklist Name	**USAID GLAAS Access Agreement Form**	**GLAAS User Access/Roles Request Form**	**Approval Form for Access to GLAAS Production for Non-Authorized Users (Waiver) Form**	**Non-Disclosure Agreement for GLAAS Access (Waiver) Form**	**Phoenix Access Request Acknowledgement Form**	**Business Objects Enterprise Access Form**
New User Account Checklist	Yes	Yes	Verify	Verify	If needed	If Needed
Deactivate User Account Checklist *	No	No	No	No	No	No
User Account Transfer Checklist	No	Yes	No	No	If needed	No
User Account Password Reset Checklist **	No	No	No	No	No	No

*An e-mail should be sent to OAA Solution Center by the SME.

**An e-mail should be sent to the SME by the user.

4.1 GLAAS NEW USER ACCOUNT CHECKLIST

Table 4-2 identifies the steps required to request a new user account on the GLAAS system.

Table 4-2. GLAAS New User Account Checklist

Step	POC	Description
1	SME	Download the *USAID GLAAS Mission User Access Policies and Forms Packet* at: http://inside.usaid.gov/GLAAS/index.html
2	User	Complete and sign the *USAID GLAAS Access Agreement* form. Users are encouraged to take this form with them to training so that the form can be signed by the GLAAS trainer.
3	User	If needed – complete and sign the *Phoenix Access Request Acknowledgement* form.
4	User	If needed – complete and sign the *Business Objects Enterprise Access Form.*
5	User	Read the *USAID Rules of Behavior for Users*, file name: 545mbd_060106_cd44 - http://inside.usaid.gov/ADS/500/545mbd.doc
6	CTOs only	Completion of the on-line Accruals course is required before access will be given. In addition, a copy of the CTO Certification and Accruals training certificate should be included with the completed GLAAS User Account documentation (if available).
7	Supervisor	Sign the *USAID GLAAS Access Agreement* form. (other forms if needed).
8	Supervisor	Validate that the user received/reviewed *USAID Rules of Behavior for Users* document.
9	Supervisor	(WAIVER) Required for non-authorized employees only (see Section 1.2) – Complete and sign the *Approval Form for Access to GLAAS Production For Non-Authorized Users (Waiver)* document.
10	Supervisor	(WAIVER) Required for non-authorized employees only (see Section 1.2) – Complete and sign the *Non-Disclosure Agreement for GLAAS Access (Waiver)* document.
11	SME	Confirm the user has received GLAAS Training and verify compliance of user requests with access policies.
12	SME	Complete *GLAAS User Access/Roles Request Form.*
13	SME	Send all of the signed and completed forms to the M/OAA System Administrator. Submit as a scanned PDF file via email or fax to Judy Britt.
14	GLAAS ISSO	The GLAAS ISSO reviews the new user access/roles request package and approves or disapproves the request.
15	M/OAA SA	Review the submitted user account request forms for accuracy and completion.
16	M/OAA SA	Forward (via email or fax) the signed and completed forms for the respective systems to the Phoenix/BOE System Administrators (as needed).
17	M/OAA SA	Create GLAAS (PRISM) user account for the user.
18	M/OAA SA	Create FPDS-NG user account for the user (if needed).

Step	POC	Description
19	M/OAA SA	Notifies via e-mail the SME, user, and supervisor that the GLAAS (PRISM), and FPDS-NG, user IDs (only user IDs) have been created.
20	M/OAA SA	Send ONLY the USER a second e-mail – identifying the GLAAS (PRISM), and FPDS-NG initial passwords. **Note**: The user will be able to access GLAAS and will be notified separately as to when he/she can run reports and/or perform any financial transactions until he/she is given BOE and Phoenix access.
21	ISSO	The GLAAS ISSO stores all of the user access forms.

4.2 GLAAS DEACTIVATE USER ACCOUNT CHECKLIST (USAID/MISSION)

Table 4-3 identifies the steps required to deactivate a user account on the GLAAS system.

Table 4-3. GLAAS Deactivate User Account Checklist (USAID/Mission)

Step	POC	Description
1	Supervisor or M/IRM	Notifies the SME about the need to deactivate user's access rights.
2	SME	SME sends (via e-mail) the M/OAA System Administrator the user's account information.
3	OAA System Administrator	Deactivates the user's access rights.
4	OAA System Administrator	Notifies (via e-mail) the System Administrator for Phoenix and BOE about the deactivation of the user's access rights (as needed).
5	BOE System Administrator	Deactivates the user's BOE account.
6	BOE System Administrator	Notifies (via e-mail) the M/OAA System Administrator and the SME of the account deactivation.
7	Phoenix System Administrator	Deactivates user's Phoenix Account.
8	Phoenix System Administrator	Notifies (via e-mail) the M/OAA System Administrator and SME of the account deactivation.
9	GLAAS ISSO	Stores the account deactivation email sent by the M/OAA System Administrator.

4.3 GLAAS USER ACCOUNT TRANSFER CHECKLIST

Table 4-4 identifies the steps required to transfer a user account on the GLAAS system.

Table 4-4. GLAAS User Account Transfer Checklist

Step	POC	Description
1	User	Contacts and informs his/her SME about the transfer.
2	SME	Contacts the M/OAA System Administrator within two days of the user's departure date.
3	OAA System Administrator	Deactivates the user's GLAAS account.
4	New Site SME	On user's arrival, the new SME completes the *GLAAS User Access/Roles Request Form.*
5	New Site SME	The SME sends (via email or fax) the forms to the M/OAA System Administrator.
6	OAA System Administrator	Updates the GLAAS user's account.
7	OAA System Administrator	Sends the Phoenix user access forms to the Phoenix System Administrators (if necessary).
8	Phoenix System Administrator	Updates the user's Phoenix account.
8	Phoenix System Administrator	Notifies (via email) the M/OAA System Administrator that the account has been updated.
9	GLAAS ISSO	Stores all of the user access forms.

4.4 GLAAS USER ACCOUNT PASSWORD RESET CHECKLIST

Table 4-5 identifies the steps required to request a password reset for an account on the GLAAS system.

Table 4-5. GLAAS User Account Password Reset Checklist

Step	POC	Description
1	User	Contacts their SME and presents a valid picture ID.
2	SME	Resets the user's password.
3	SME	Notifies the user (via email) that their password has been reset.
4	SME	Provides the user with the new password via telephone.

APPENDIX A: ACRONYMS

Acronym	Definition
AAAS	American Academy for the Advancement of Science
AO	Agreement Officer
APS	Annual Program Statement
BOE	Business Objects Enterprise
BTC	Bureau Transition Coordinator
CO	Contracting Officer
CPS	Contractor Performance System
CTO	Cognizant Technical Officers
eSRS	electronic Subcontracting Reporting System
FAR	Federal Acquisition Regulation
FBO	FedBizOpps
FPDS-NG	Federal Procurement Data System - Next Generation
FSN	Foreign Service National
GLAAS	Global Acquisition & Assistance System
IAA	Interagency Agreement
ID	Identification
IPA	Intergovernmental Personnel Act
IRM	Information Resources Management
ISSO	Information Systems Security Officer
JCC	Joint Career Corps
M/OCIO	Management Bureau/Office of the Chief Information Officer
M/OAA	Management Bureau/Office of Acquisitions and Assistance
M/OAA/CAS	Management Bureau/Office of Acquisitions and Assistance/Cost, Audit and Support Division
N/A	Not Applicable
NEP	New Entry Professional
OPM	Office Personnel Management
OR	Obligation Recorder
PAPA	Participating Agency Program Agreement
PASA	Participating Agency Service Agreements

Acronym	Definition
PCH	Purchase Card Holder
PDF	Portable Document Format
PHI	Public Health Institute
PM	Program Manager
PMI	Presidential Management Interns
POC	Point of Contact
POPF	Population Fellows
PPRIS	Past Performance Information Retrieval System
PRIME	Principal Resource for Information Management Enterprise-Wide
PSC	Personal Services Contractors
RFA	Request for Application
RSSA	Resource Support Service Agreements
SA	System Administrator
SME	Subject Matter Expert
TAAC	Technical Advisors in Aids, Child Survival and Population
TCN	Third Country National
TDY	Temporary Duty Travel
USAID	U.S. Agency for International Development
USAID/W	U.S. Agency for International Development/Washington
U.S.C	United States Code
USDH	United States Direct Hire
USG	United States Government

APPENDIX B: GLAAS USER ROLE DESCRIPTIONS

"Before GLAAS"	Agency Description	GLAAS Role Name	GLAAS Description	USAID Role	Phoenix Role
Requestor (NMS)	❒ Enters activities in A&A on the Web; generates Request; creates PR in Phoenix. ❒ Creates MAARDs.	Requestor	❒ Creates and self-approves APP; prepares requests; attaches all documentation (Statement of Work (SOW), Budget, etc.); edits/modifies all documentation.	❒ Requestor ❒ Program Analyst ❒ CTO	❒ Procurement Commitment Verifier (PCVERIFYR)
❒ Program Manager ❒ Budget Authority ❒ Financial Management Specialist ❒ Strategic Objective (SO) Team Leader ❒ Controller (Overseas)	❒ Approves PR in Phoenix and attaches it to New Management System (NMS) request. ❒ Assigns the Contracting Officer (CO) in NMS. ❒ Mission-Controller – Determines funding strip and commits funds in Phoenix; annotates MAARD funds available.	Program Manager	❒ Approves the commitment of funds associated with a program/project. ❒ Verifies Buyer in the Requisition – Buyer assignment. ❒ Approves and Releases the Requisition. ❒ Final approval in the MAARD process. ❒ Replaces the process of the funds commitment currently handled by the controller.	❒ Program Manager ❒ Budget Authority ❒ Controller (Overseas) ❒ Financial Management Specialist ❒ Strategic Objective (SO) Team Leader	❒ Procurement Commitment Processor (PCPROCR)

"Before GLAAS"	Agency Description	GLAAS Role Name	GLAAS Description	USAID Role	Phoenix Role
Negotiator	❒ Accepts request in NMS. ❒ Completes the Solicitation. ❒ Proposal, Award functions. ❒ Completes ProDoc entries. ❒ Assigns Cognizant Technical Officer (CTO).	Negotiator	❒ Prepares solicitations, synopses & award packages; posts solicitation notices and synopses; posts award notices to FedBizOpps; performs negotiations, enters the FPDS-NG information. ❒ Prepares Request for Application (RFA) and Annual Program Statements (APS) notices and synopsis for posting to Grants.gov.	❒ Negotiator ❒ Contract Specialist ❒ Grants Specialist	❒ Procurement Obligation Verifier (POVERIFYR)
CTO	❒ No function within NMS.	Cognizant Technical Officer (CTO)	❒ Creates and self approves APP; administers, monitors.	❒ CTO	❒ View Only Role
AO	❒ Obligates funds and approves IAAs and Grants awards; assigns negotiator.	Agreement Officer (Assistance Awards) Only	❒ Obligates funds and approves IAAs and Grants; assigns negotiator.	❒ Agreement Officer	❒ Procurement Obligation Processor (POPROCR)
CO	❒ Obligates funds and approves awards; assigns negotiator.	Contracting Officer (CO)	❒ Obligates funds and approves awards; assigns buyer/negotiator over the $2,500 limit.	❒ CO	❒ POPROCR

"Before GLAAS"	Agency Description	GLAAS Role Name	GLAAS Description	USAID Role	Phoenix Role
Obligation Recorder (OR)	❒ Enters, updates, and approves the contract and/or obligation in the system. (Acts as an authorizing official, i.e., Mission Director, Deputy Assistant Administrator.) The Obligation Recorder should have the same functionality as the authorizing official without a type of warrant.	Obligation Recorder (OR) (IAAs and Grants only)	❒ Enters, updates, and approves the contract/grants and/or obligation in the system. (Acts as an authorizing official, i.e., Mission Director, Deputy Assistant Administrator.) The OR should have the same functionality as the authorizing official without a type of warrant.	❒ OR ❒ Contracting Manager	❒ POPROCR
Closeout Administrator	❒ Prepares memos to various offices (i.e., Program Office, Financial Officer) for the close out of awards; handles the deobligation of remaining unused funds.	Closeout Administrator	❒ Prepares the closeout checklists; prepares memos to Program Office and Financial Officer for the close out of awards; deobligates remaining unused funds.	❒ Closeout Administrator	❒ View Only
Purchase Card Holder	❒ Purchases micropurchases under $3000 limit using a credit card.	Purchase Card Holder	❒ Purchases micropurchases under $3000 limit using a credit card.	❒ Purchase Card Holder	❒ POPROCR

"Before GLAAS"	Agency Description	GLAAS Role Name	GLAAS Description	USAID Role	Phoenix Role
Evaluator	❒ User who evaluates applications.	Evaluator Only	❒ User who evaluates applications.	❒ Evaluator	N/A

APPENDIX C: USAID GLAAS MISSION USER ACCESS FORMS

This appendix contains the following USAID GLAAS Mission user access forms:

- USAID GLAAS Access Agreement
- GLAAS User Access/Roles Request Form
- Approval Form for Access to GLAAS Production for Non-Authorized Users (Waiver)
- Non-Disclosure Agreement for GLAAS Access (Waiver)
- Phoenix Access Request Acknowledgement
- Business Objects Enterprise Access Form

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GLAAS 102 Walkthrough # 2: Creating a Milestone Plan

Scenario:

You have been assigned as the buyer for a non-competitive contract for computer hardware to support the local area network. Before you begin creating this award, you need to set up a procurement milestone plan.

You will:

1. Create a Milestone Plan for this procurement.
2. Link the Milestone Plan to a GLAAS Requisition.
3. Baseline the Milestone Plan.

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Welcome Page</td><td>Create</td></tr>
<tr><td>Document Type</td><td>Milestone Plan</td></tr>
<tr><td>Milestone Plan Name</td><td>Enter a unique name using the format: “MS-Site-FY-Free Form Description” (e.g., MS-000-10-PSC001)</td></tr>
<tr><td>Milestone Template</td><td>Search the Public folder and select DK2 Definitive Contract (Non-Competitive)</td></tr>
<tr><td>Milestone Plan Date</td><td>Start Date = “Current Date”
▪ Click the Continue button.</td></tr>
<tr><td>Main / General</td><td>▪ Click the Edit button.
▪ Enter the Milestone Description:
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Description</td><td>Computer Hardware</td></tr>
</table>
▪ Milestone Steps to update
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>8 – Obtain Necessary Reviews</td><td>PALT = 0</td></tr>
<tr><td>10 – Conduct Q & A</td><td>PALT = 0</td></tr>
<tr><td>Insert a step above Milestone Step #8</td><td>PRE_RFP_DO – Prepare RFP Document</td></tr>
<tr><td colspan="2">At Milestone Step # 30 (Prepare Award), select your student ID as the Responsible Party.</td></tr>
</table>
▪ Select the Notification icon for Milestone Step 37.</td></tr>
<tr><td>Notification Detail</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Type of Notification</td><td>Reminder of Action</td></tr>
<tr><td>User ID</td><td><Your Student ID></td></tr>
<tr><td>Number of Calendar Days in Advance</td><td>15</td></tr>
</table>
▪ Click the Generate button to generate a message. Edit if you wish.
▪ Click the Submit button to save the notification.
▪ Click the Return link to go back to the Milestone Plan main screen.</td></tr>
<tr><td>Main / General</td><td>▪ Scroll to the bottom of the screen and click the Submit button.
▪ Click the Link button.</td></tr>
</table>

Section	User Data	
Link Document	**Field Name**	**Value**
	Link Options	Requisition
	Requisition Number	Click the **Link** button [...] to search for and link the Requisition provided by your instructor.
	▪ Click **Submit** to go back to the Milestone Plan main screen.	
Main/General	• Click the **Set Baseline** button to save the base-lined plan. • Click **Yes** when prompted.	
Main / General	• Click the **Return to Home** link to go back to the Welcome Page.	

GLAAS 102 Walkthrough #3: Creating a Purchase Order

Scenario:

You need to purchase new computer hardware to support the local area network. You will be creating a Purchase Order from a GLAAS Requisition.

This Purchase Order will have one line item when you are finished:

Line Item	Description	Total Estimated Cost	Total Obligated Amount
0001	Hardware	$48,525	$48,525
	Totals:	**$48,525**	**$48,525**

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Welcome Page</td><td>• Click Create on the Access Panel.</td></tr>
<tr><td>Document Create</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Document Type</td><td>“Purchase Order”</td></tr><tr><td>Create From</td><td>“Requisition”</td></tr><tr><td>Purchase Order Numbering Mask</td><td>Select the appropriate numbering mask for this action.</td></tr><tr><td>Section Template</td><td>“Select New”</td></tr></table>• Click Continue.</td></tr>
<tr><td>Create Purchase Order from Requisition</td><td>• Enter the Requisition Number provided by your instructor in the For field.
• Delete the Site.
• Delete the Buyer.
• Click the Display toolbar button.
• Search for the Requisition Number provided by your instructor.
• Click the Y link in the Select Line Items column.
• At the bottom of your screen Select the line item from the Requisition.
• Click Create to continue.</td></tr>
<tr><td>Clause Template Selection</td><td>• Search for the Commercial Items (UCF) template.
• Click Commercial Items (UCF) under the Clause Template Name.
• Check the boxes for Sections A – I.
• Click the Continue button.</td></tr>
<tr><td>Main / General</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Invoice Office</td><td>Enter the office code where invoices should be sent.</td></tr><tr><td>Vendor</td><td>CISCOSYSTE</td></tr><tr><td>Type of Warrant Required</td><td>SAP (SIMP ACQ PROC)</td></tr><tr><td>Contracting Officer</td><td>CONTRACTINGOFFICER20</td></tr><tr><td>COTR/AOTR</td><td>JCOTR</td></tr><tr><td>Period of Performance</td><td>Enter the Effective Date as the start date and the Completion Date as the end date.</td></tr></table>• Click the Additional Info link on the left-hand menu.</td></tr>
</table>

Section	User Action
Main / Additional Info	

Field Name	Value
Reference Your Text	Quote 10/29/2009
NAICS Code	811212
Originating Office	Enter the office code originating this action.
Is this an IT-related purchase?	Yes
Performance-Based Service Acq	No – Service where PBA is not used
Cost Acctg Standards Clause	Not Applicable – Exempt from CAS
Purchase Card Payment Method	No
Use of Recovered Material	No Clauses included
Commercial Item Acq. Procedures	Commercial Item
CO's Determination of Bus. Size	Other Than Small Business

- Scroll down.

Field Name	Value
Payment Method	DIRECT
Place of Performance	Enter the relevant geographic code.
Authorized Geographical Code	000
Subcontract / Subgrant Plan Required	NO
Performance Based Contract/Results Oriented Grant	NO
Grants Under Contract / Contracts Under Grant	NO
AIDAR/Agency Exemptions to Competition	0
Requisition Number (for mods only)	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

- Click the **Text** link on the left-hand menu.

Main / Text

Field Name	Value
Description	New computer hardware to support the local area network $48,525
Header	New computer hardware to support the local area network $48,525

- Click the **Items** link on the left-hand menu.

Items

- Click the Item **001** link to open the line item.

Items / General #0001

Field Name	Value
Period of Performance	Enter the **Effective Date** as the start date and the **Completion Date** as the end date.

- Click the **Summary** link on the left-hand menu.

Section	User Action
Items/Summary	• Review the amounts and accounting information for accuracy. • Click the **Return** link on the left-hand menu.
Items	• Click the **Package** link on the left-hand menu.
Package / Cover Page	• Click the **Change Form** button and select the *OF-347(4/2006)* link. • Click the **Body** link on the left-hand menu.
Package / Body	**Field Name** / **Value** Clause Grouping / All Reference then Full Text per database • Click the **Configure** toolbar button. • **Delete** *Sections J – M.* • Click the **Return** link. • Click the **Generate** toolbar button. • Click the **Main** link on the left-hand menu.
Main / General	• Click the **FPDS** button. • In the separate FPDS-NG window, click the **Validate** button. • Click the **Save Draft** button. • Close the FPDS-NG window. • Click the **Validations** link on the left-hand menu to continue.
Validations	• Correct all *Errors* generated. • Read all *Warning* messages and correct any that should be fixed. • When no errors appear, click the **Route History** link on the left-hand menu.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document.** • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Walkthrough #4: Creating a Personal Services Contract (PSC)

Scenario:

You need to issue a Contract to a PSC. This Contract will be incrementally funded, so you will only obligate half of the overall ceiling at this time.

A Requisition for $47,000 for this PSC action has already been created and released in GLAAS. You will need to find this Requisition and use it to create a Contract. The Contract will have two funded line items for a total of $94,500.

Line Item	Description	Ceiling/Total Estimated Cost	Total Obligated Amount
0001	Total Compensation – Base Year	$92,500	$45,000
0002	Total Other Costs – Base Year	$2,000	$2,000
	Totals:	**$94,500**	**$47,000**

Section	User Action
Welcome Page	• Click **Create** on the **Access Panel**.
Document Create	**Field Name** / **Value**: Document Type: Contract Create From: Requisition Contract Numbering Options: Select the appropriate Personal Services Contract numbering mask. Section Template: None Report to FPDS as a Stand-alone Contract: Check this box MAS Number: Leave Blank • Click the **Continue** button.
Requisition Selection	• Search for the Requisition Number provided by your instructor. • Click the **Y** link in the **Select Line Items** column. • At the bottom of your screen, **Select All** to include both items from the Requisition. • Click **Create** to continue.
Main / General	**Field Name** / **Value**: Award Type: Cost Effective Date: One month from today. Completion Date: One year out from the Effective Date Invoice Office: Enter the office code where invoices should be sent. Vendor: BARJOHE – John E. Barden Type of Warrant Required: Level 1 Contracting Officer: JCOAO COTR: JCOTR Primary Produce / Service Code: Confirm this is the correct code for the award. Period of Performance: Enter the **Effective Date** as the start date and the **Completion**

Section	User Action
	Date as the end data. • Click the **Additional Info** link to continue.
Main / Additional Info	

Field Name	Value
NAICS Code	541990 – All Other Professional, Scientific and Technical Services
Performance-Based Service Acq	Yes – Service where PBA is used
Cost Acctg Standards Clause	Yes – CAS clause included
Purchase Card Payment Method	No
Use of Recovered Material	No clauses included
Commercial Item Acq. Procedures	Commercial item Procedures not used
CO's Determination of Bus. Size	Small Business
Payment Method	DIRECT
Place of Performance	Enter the relevant geographic code
Subcontract / Subgrant Plan Required	NO
Performance Based Contract / Results Oriented Grant	YES
COTR/AOTR Assigned Date	Enter the day before the **Award Date**
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all parties?	YES
Has a hard copy been placed in the OAA contract award file?	YES
Award TEC	94500
AIDAR/Agency Exemptions to Competition	A
Requisition Number (for mods only)	0
Send Notification to Requestor(s) of unused funds on the Requisition	NO

• Click the **Text** link to continue.

Main / Text

Field Name	Value
Description	PSC Contract
Header Text	PSC Contract for John E. Barden

Click the **Items** link to continue

Item / General #1

• Click the **Item Number** link **0001**.

Field Name	Value
Description	Total Compensation – Base Year
Period of Performance	Must match the POP entered on the **Main / General** screen.
Award Type	Cost
Estimated Total Cost	92500

• Click the **Funding** link to continue.

Item / Funding #1

Field Name	Value
Funding Type	Incrementally Funded
Incrementally Funded Through (Date)	Enter the **Completion Date**.
Ship To Value	92500

Section	User Action
	Incrementally Funded Amount: 45000 • Click the **Return** link to continue creating this Contract.
Items	• You return to the Items screen. • Click the **Item Number** link **0002** to review and update the second line item.
Item / General #2	**Field Name** / **Value** Description: Total Other Costs – Base Year Period of Performance: Must match the POP entered on the **Main / General** screen. Award Type: Cost • Click the **Funding** link to continue.
Item / Funding #2	• This item is fully funded and the entire line item amount of $2,000 will be obligated with this action. • Click the **Return** link. • Click the **Vendor** link.
Vendor	• Check the **Vendor Address** information to make sure you have the correct Vendor, Address Code. • Click the **Synopsis** link.
Synopsis	• Click the **Add** button to add an Award Notice to send to FedBizOpps. **Field Name** / **Value** Solicitation Number: N/A Web Link: URL: www.usaid.gov Email: Enter your email address. • Click the **Submit** button. • Click **No** when asked to "Send the Synopsis now?" • Click the **Package** link.
Package / Cover Page	• Click **Change Form** and select **SF-26** and review the Cover Page. • Click **Body** link.
Package / Body	• Select **All Reference then Full Text per database** for Clause Grouping. • Click the **Configure** toolbar button. • Click the **Add** toolbar button. **Field Name** / **Value** Section: A Title: Schedule Menu Title: Schedule Section Type: Custom Required: Yes • Click the **Create** button. • Click the **Return** link. • Click the **Section Title** (Schedule). • Click the **Add** toolbar button. • Select the **PSC Appendix D Article & General Provision** Database and click the **Display** toolbar button. • Select clause number **Article 1** through **Article 8.** • Click the **Continue** toolbar button. • Click the **Continue** button. • Click the **Return** link to continue. • **Generate** your package document. • Click the **".rtf"** file name link and **Open** to view the Contract in a separate browser.

Section	User Action
	• Close the separate browser. • Click the **Attachments** link to continue.
Attachments	• Click the **Library** toolbar button. • Search for and select the file Personal Services Contracting (PSC) Action (AID 300-1). • Click the **Submit** button to add this attachment. • Click the **Check Out** toolbar button. • Click the hyperlink "Click here to Check Out a300-1.doc." • Click the **Save** button. • Save this document to your desktop or somewhere else on your computer. • In the "Download Complete" pop-up window, click **Open**. • Fill out the form in Microsoft Word. • Click **Save** to save the updated data and close the document. • Go back to GLAAS and click the link "Click here to return." • Click the **Check In** button. • Click the **Skip Comments** button. • Click the **Browse** button and find the file you checked out, and then click **Open**. • Click **Submit** to Check In your file. • Click the **Main** link on the left-hand menu to continue.
Main / General	• Click the **FPDS** button. • In the FPDS-NG window, click the **Validate** button. • Enter *72000* as the **Contracting Office ID**. • Enter *790238638* as the **DUNS No**. • Click the **Save Draft** button. • Close the FPDS-NG window. • Click the **Validations** link on the left-hand menu to continue.

Validations	• Correct all **Errors** generated by clicking the links to each message. Fix the errors, and click the **Validations** link again to verify.
	• Read all **Warning** messages and correct any that must be fixed.
	• Confirm the following amounts:
	  o **Obligation** is *$47,000*
	  o **Total Amount without Options** is *$94,500*
	  o **Total Amount** is *$94,500*
	• Click the **Route History** link on the left-hand menu to continue.

Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Walkthrough #5: Modifying an Award to Add Incremental Funding

Scenario:

You need to modify an existing Personal Services Contract (PSC) to incrementally fund the Total Compensation line item. $45,000 were previously obligated on this CLIN, you will now obligate an additional $47,500. The Award TEC will remain at $168,000.

Line Item	Description	Total Estimated Cost	Amount Obligated This Action	Total Obligated Amount
0001	Total Compensation	$92,500	$47,500	$92,500
0002	Total Other Costs	$2,000	$0	$2,000
0003	Option Year	$73,500	$0	$0
	Totals:	**$168,000**	**$47,500**	**$94,500**

Section	User Action
Welcome Page	• Click **Open** on the Access Panel.
Document Selection	• Change **Document Type** to "Requisition." • Change **Select From** to "All Requisitions." • Change **Requisition Type** to "Requisition for Modification." • Enter the Requisition for Modification number provided by your instructor in the **For** field. • Delete "USAID/TRAINING" from the **Site**. • Click the **Search** toolbar button. • When you find your Requisition for Modification number, click the Y link in the **View Line Items** Column to preview the line items. • Click the **Requisition Number** to select the requisition and proceed.
Main: General	• Click the **Text** link and review the Requisition for Modification.
Main: Text	• Click the **Proceed to Award** toolbar button to turn this Requisition for Modification into an Award modification.
Create New Modification	• Select **Contract Modification #** from the **Select Document Mask** dropdown list. • Select the **Reason for Modification**. • Click the **Create** button. • Click **Yes** to open the Modification.
Main: General	**Field Name** / **Value** Award Date: — Enter a date two weeks from today. Effective Date: — Enter a date three weeks from today. Invoice Office — Enter the office code where invoices should be sent. • Click the **Additional Info** link on the left-hand menu.

Section	User Action
Main: Additional Info	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Action Type</td><td>UM</td></tr></table>• Click the **Items** link on the left-hand menu.
Items	• Click item number **0001**.
Item 0001: General	• Click the **Modify** button. • Click the **Funding** link on the left-hand menu.
Item 0001: Funding	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Funding Type</td><td>Incrementally Funded</td></tr><tr><td>Incrementally Funded Through (Date)</td><td>Enter the end of next fiscal year.</td></tr></table>• Click the **Add from Requisition** button.
Requisition Selection	• Select the **All** radio button. • Select the **All Requisitions** radio button. • Enter the requisition number provided by your instructor in the **For** field. • Click the **Display** button. • Click **Yes** in the **View Items** column for your requisition number. • Click **0001** in the **Item Number** column.
Item 0001: Funding	• Scroll down and click the **Refresh** button next to **Refresh Data from Requisition.** • Verify that the **Sub-Object Code (SOC)** is "1130000." • Click the **Save** button. • Click the **Return** link on the left-hand menu.

Main:
General
	• Verify that **Net View: On** in the award header.
	  ○ Your Contract should have the following amounts:
	  ▪ **Obligated Amount:** $94,500.00
	  ▪ **Total Amount:** $168,000.00
	• Click the **Net View: Off** toolbar button.
	  ○ Your Contract should have an **Obligated Amount** of $47,500.00.
	• Click the **Package** link to continue.

Package: Cover Page	• Click the **Change Form** toolbar button to select a cover page. • Click the **Submit** button.
Form Selection	• Click the **SF-30** link.
Package: Cover Page	• Click the **Edit** toolbar button.
SF-30 Modification of Contract	• Type "Incremental funding" in the field below **13. D Other (Specify type of modification and authority).** • Click the **Submit** button.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Package:
Cover Page</td><td>• Click the Main link on the left-hand menu.
• Click the Change Text link on the left-hand menu.</td></tr>
<tr><td>Main:
Change Text</td><td>• Click the Generate toolbar button.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Description Text</td><td>The purpose of this modification is to add funding to the salaries CLIN.</td></tr>
</table>
• Click the Validations link on the left-hand menu.</td></tr>
<tr><td>Validations</td><td>• Correct any Errors generated by clicking the links to each message.
• Click the Route History link on the left-hand menu.</td></tr>
<tr><td>Route History</td><td>• Click the Route button to select For Approval and click the Submit button.
• Click New Route and Submit.
• Click the Add button and select the link for the User ID provided by your instructor.
• Set the Route Role to “CO/AO” and the Type to “Approval.”
• Click the Send button.
• Click the link for Click here to continue Routing your document.
• Click the Skip Comments button.
• Click the Welcome Page link to return to the Welcome Page.
• The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.</td></tr>
</table>

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GLAAS 102 Walkthrough #6: Creating a Solicitation

Scenario:

You have been assigned as the Buyer on a requisition for an Educational Program, which is ready to be advertised on Federal Business Opportunities. You will create a solicitation from the requisition and send the synopsis to FedBizOpps.

This solicitation will be routed for approval to a Contracting Officer.

The solicitation will contain one line item:

Line Item	Description	Total Estimated Cost	Current Committed Amount
1	Education and life skills program	$1,500,000	$894,000

Note that the Total Estimated Cost of the line item is *higher* than the Committed Amount on the requisition, which indicates that the award will be incrementally funded. You will have to adjust the line item amounts to reflect the Total Estimated Cost when you create this solicitation.

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Welcome Page</td><td>Click Create on the Access Panel.</td></tr>
<tr><td>Document Type</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Document Type</td><td>Solicitation</td></tr>
<tr><td>Create From</td><td>Requisition</td></tr>
<tr><td>Contract Numbering Masks</td><td>Select the M/OAA numbering mask for Solicitation.</td></tr>
<tr><td>Selection Template</td><td>Select New</td></tr>
</table>
Click the Continue button</td></tr>
<tr><td>Requisition Selection</td><td>Search for the Requisition number provided by your Instructor.
Click the Y link next to the Requisition and click the Select All button, then click Create.</td></tr>
<tr><td>Clause Template Name</td><td>Search for and select Cost Reimbursement Services template.
Click the Select All button to select Sections A – M, then click the Continue button.</td></tr>
<tr><td>Main / General</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Date Issued</td><td>Enter 30 days from today.</td></tr>
<tr><td>Type of Solicitation</td><td>5 – RFP</td></tr>
<tr><td>Solicitation Procedure</td><td>Negotiated Proposal/Quote</td></tr>
<tr><td>Anticipated Type of Contract</td><td>Cost</td></tr>
<tr><td>NAICS Code</td><td>611710</td></tr>
<tr><td>Buyer</td><td>Search for or enter your training ID.</td></tr>
<tr><td>Contracting Officer</td><td>JCOAO</td></tr>
<tr><td>Primary Product/Service Code</td><td>U099</td></tr>
<tr><td>Responses Due Date</td><td>60 days from current date</td></tr>
</table></td></tr>
</table>

Section	User Data
Main / General	

Field Name	Value
Copies	1
Synopsized	Check Synopsized check box
Date	Enter 30 days from today.
Transmitted Date	Enter 30 days from today.
Published Date	Enter 30 days from today.

Click the **Additional Info** link on the left-hand menu.

Main / Additional Info

Field Name	Value
Technical Point of Contact	CTO20
Period of Performance	Enter 90 days from current date as the start date and then one year out for the end date.
GDA Flag	NO
Place of Performance	Enter the relevant geographic code.
Authorized Geographical Code	Enter the relevant authorized geographical code.
Subcontract/Subgrant Plan Required	YES
Performance Based Contract/Results Oriented Grant	NO
Action Type	DK1
Award TEC	1500000

Click the **Text** link on the left-hand menu.

Main / Text

Field Name	Value
Description	Competitive Contract for $1,500,000 for Education and Life Skills Program for Disadvantaged Youth
Header Text	Educational Program for Disadvantaged Youth.

Click the **Items** link on the left-hand menu.

Items / Item General #1

- Click Item Number link **0001**.

Field Name	Value
Period of Performance	Enter 90 days from current date as the start date and then one year out for the end date.
Award Type	Cost
Estimated Total Cost	1500000

- Click **Ship To/Acct** on the left-hand menu.

Items / Ship To / Acct

- Click the link under the Ship To column.

Field Name	Value
Amount	1500000

- Click Account ID **1**.

Field Name	Value

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Items/Accounting Information Detail</td><td>
<table>
<tr><td>Amount</td><td>894000 (Do not edit this information)</td></tr>
</table>

Click Submit once at the Accounting Information Detail screen.
Click Submit again at the Delivery Location / Accounting Detail screen.
Click Return on the left-hand menu.
Click Synopsis on the left-hand menu.

</td></tr>
<tr><td>Synopsis</td><td>

Click the Add toolbar button.

<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Action Code</td><td>Presol Notice</td></tr>
<tr><td>Set Aside</td><td>N/A</td></tr>
<tr><td>URL</td><td>http://www.usaid.gov</td></tr>
<tr><td>Description</td><td>USAID Training</td></tr>
<tr><td>Place of Performance Name</td><td>Enter the relevant place of performance.</td></tr>
</table>

Click the Submit button.
Click Yes to post your Synopsis.
Click the Transmit Later button.

</td></tr>
<tr><td>Package / Cover Page</td><td>

Click Package on the left-hand menu.
Click Change Form button from the toolbar and select SF-33.

</td></tr>
<tr><td>Package / Body</td><td>

Click Body on the left-hand menu.

<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Clause Grouping</td><td>All Reference then Full Text per database</td></tr>
<tr><td colspan="2">Click Remove UCF button.</td></tr>
<tr><td>Click OK.</td><td>** Note the REMOVE UCF button is gone.</td></tr>
<tr><td>Click Load Template button.</td><td>

Search for and select Cost Reimbursement Services – AIDAR template.
Select sections A and G, then click Continue.
Merge A into Contract Clauses.
Merge G into Contract Administration Data.

</td></tr>
</table>

Click the Submit button.
Click the Generate toolbar button.
Click the Submit button to incorporate the clauses as full text.

</td></tr>
</table>

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Package / Attachments</td><td>
Click Attachments on the left-hand menu.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Click the Library button</td><td>Search for 'Classified Information Nondisclosure Agreement' document; Click on the document link.</td></tr>
</table>
Click the Submit button.
Click Validation on the left-hand menu.
</td></tr>
<tr><td>Validations</td><td>
Correct all Errors generated by clicking the links to each message. Fix the errors, and click the Validations link again to verify.
Read all Warning messages and correct any that must be fixed.
When no errors appear, click Route History at the left-hand menu.
</td></tr>
<tr><td>Route History</td><td>
Click the Route button to select For Approval and click the Submit button.
Click New Route and Submit.
Click the Add button and select the link for the User ID provided by your instructor.
Set the Route Role to "CO/AO" and the Type to "Approval."
Click the Send button.
Click the link for Click here to continue Routing your document.
Click the Skip Comments button.
Click the Welcome Page link to return to the Welcome Page.
The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.
</td></tr>
</table>

Recording Vendor bid Responses

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Vendor / Responses</td><td>
Open the Approved and Released Solicitation and select Vendor.
Select Responses on the left menu.
Select Permanent Vendor from the drop-down list.
Search for Code and select MANRESINT (Management Resources International)
Select Permanent Vendor from the drop-down list.
Search for Code and select WINROINTER (Winrock International).
Select Temporary Vendor from the drop-down list.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Name</td><td>TSM Solutions</td></tr>
<tr><td>Contact Name</td><td>Tom Waters</td></tr>
<tr><td>Contact Phone</td><td>718-123-4567</td></tr>
<tr><td>Address 1</td><td>718 Pine Valley Station</td></tr>
<tr><td>City</td><td>New York</td></tr>
<tr><td>State</td><td>NY</td></tr>
<tr><td>Postal Code</td><td>10001</td></tr>
<tr><td>Country</td><td>US</td></tr>
</table>
Click the Submit button.
</td></tr>
</table>

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Vendor / Responses</td><td>
Select Management Resources INTL INC by clicking on checkbox and click the Edit toolbar button to view the General Information screen.
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Description</td><td>Manresint Bid #1</td></tr></table>
Click the Items link on the left hand menu and open item 0001
<table><tr><td>Estimated Total Cost</td><td>955000</td></tr></table>
Click the Return link.
Click the Return link.
Select TSM Solutions and click the Edit toolbar button to view the Main / General screen.
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Description</td><td>TSM Solutions Bid #1</td></tr></table>
Click the Items link on the left-hand menu and open item 0001
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Estimated Total Cost</td><td>1002000</td></tr></table>
Click the Return link on the left-hand menu.
Click the Return link on the left hand menu.
Select Winrock International and click the Edit toolbar button to view the Main / General screen.
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Description</td><td>Winrock International Bid #1</td></tr></table>
Click the Items link on the left-hand menu and open item 0001
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Estimated Total Cost</td><td>935000</td></tr></table>
Click the Return link.
Click the Return link.
Click the Bid Form Info link on the left-hand menu.
</td></tr>
<tr><td>Vendor / Bid Form Info</td><td>
Click the Change Form toolbar button and select SF 1409.
Click the View Form toolbar button.
Click the View Form button and review the summary that opens in a new window.
When finished, close the window and click the Cancel button.
Click the Return to Home link on the left-and menu to return to the Welcome Page.
</td></tr>
</table>

USAID
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GLAAS 102 Walkthrough #7: Creating a Competitive Contract

Scenario:

You posted a solicitation on FedBizOpps for a contract for Educational Program. You conducted vendor proposal evaluations and the winning bid was from Management Resources International. Now you will create a contract for Management Resources International with applicable clauses from the solicitation.

The Contract will have the following line items.

Line Item	Description	CLIN Estimated Amount	Total Obligated Amount
1	Education and life skills program	$955,000	$894,000
Total		***$ 955,000***	***$ 894,000***

Section	User Action
Welcome Page	• Click the **Create** link.
Document Create	**Field Name** / **Value** Document Type: Contract Create From: Solicitation Contract Numbering Masks: Select the appropriate Contract numbering mask. Selection Template: From Solicitation Report to FPDS as a Stand-alone Contract: Place a checkmark in the Box Package Body: Do Not Copy • Click the **Continue** button.
Create Contract from Solicitation	• Search for the **Solicitation** created in the Walkthrough #6. • Click the **Bid Line Item** link **Y**. • At the Line Item Selection at the bottom of your screen, choose **MANAGEMENT RESOURCE INTERNATIONAL INC** as the Bidder/Vendor. • Click the **Select All** button. • Click the **Create** button.
Clause Template Selection	• De-select **Sections K – M**. • Click the **Continue** button.
Main / General	**Field Name** / **Value** Award Date: Enter Current Date Effective Date: One month from today Completion Date: One year out from the **Effective Date** Invoice Office: M/CFO Type of Warrant Required: LEVEL 2 • Click the **Additional Info** link on the left-hand menu.
Main / Additional Info	**Field Name** / **Value** Performance-Based Service Acq: No – Service where PBA is not used Cost Acctg Standards Clause: Yes – CAS clause included Purchase Card Payment Method: No

Section	User Action
	Use of Recovered Material: No Clauses included Commercial Item Acq. Procedures: Commercial item Procedures not used CO's Determination of Bus. Size: Other Than Small Business Payment Method: Direct COTR/AOTR Assigned Date: Enter the day before the **Award Date** Has COTR designation letter been signed by all parties and delivered to the assigned COTR and all other parties?: YES Has a hard copy been placed in the OAA contract award file?: YES Award TEC: 955000 AIDAR/Agency Exemptions to Competition: 0 – Not Applicable Requisition Number (for Mods only): 0 – Not Applicable Send notification to Requestor(s) of unused funds on the Requisition?: YES • Click the **Items** link on the left-hand menu. • Click the Item **0001** link.
Items / General #1	**Field Name** / **Value** Period of Performance: Must Match the POP entered on the **Main /General** screen Estimated Total Cost: 955000 • Click **Funding** on the left-hand menu.
Items / Funding #1	Funding Type: Incrementally Funded Incrementally Funded Through (Date): Six months from the **Effective Date** Ship To Value: 955000 • Scroll down to the **Accounting Information Detail** section. **Field Name** / **Value** Incrementally Funded Amount: 894000 • Click the **Return** link on the left-hand menu to continue. • Click the **Vendor** link on the left-hand menu to continue.
Vendor	• Check the Vendor Address information to confirm you have the correct Vendor, Address, Address Code and DUNS number. • Click the **Synopsis** link on the left-hand menu to continue.
Synopsis	• Click the **Add** button **Field Name** / **Value** Solicitation Number: Defaults with the Solicitation number used to create the contract Web Link URL: http://www.usaid.gov Email Address: Enter your email address • Click the **Submit** button. • Click **No** when asked to "Send the Synopsis now?" • Click the **Package** link on the left-hand menu to continue.
Package / Cover Page	• Click **Change Form** and select *SF-26*. • Click the **Printer** icon to review the Cover Page in a separate browser. • Select Working Copy and click the **View Form** button. • Click the **Cancel** button to return.

Section	User Action
	• Click the **Body** link at the left-hand menu to continue.
Package / Body	• Select **All Reference then Full Text per database** for the Clause Grouping. • Click the **Generate** button to create the package body (.rtf) file. • Click on the **".rtf"** file name link and **Open** to view the Body in a separate browser; then close the window. • Click on the **Main** link on the left-hand menu to continue.
Main / General	• Click the **FPDS** button. • In the FPDS window, click the **Validate** button then the **Save Draft** button. • Close out of FPDS. • Click on the **Validations** link at the left-hand menu to continue.
Validations	• Correct all *Errors* generated by clicking the links to each message. Fix the errors, and click the **Validations** link again to verify. • Read all *Warning* messages and correct any that must be fixed. • When no errors appear, click on the **Route History** link at the left-hand menu to continue.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

USAID FROM THE AMERICAN PEOPLE

GLAAS 102 Walkthrough #8: Creating a Funding Opportunity

Scenario:

You have received a requisition for a rule of law program; now you must create a GLAAS Funding Opportunity for the request for applications (RFA). The award ceiling will be $2,000,000.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Welcome Page</td><td>• Click Create on the Access Panel.</td></tr>
<tr><td>Document Create</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Document Type</td><td>Funding Opportunity</td></tr><tr><td>Create From</td><td>Requisition</td></tr><tr><td>Funding Opportunity Numbering Masks</td><td>Select the appropriate RFA numbering mask.</td></tr><tr><td>Section Template</td><td>Select Clause Template</td></tr></table>• Click the Continue button.</td></tr>
<tr><td>Create Funding Opportunity from Requisition</td><td>• Enter the document number provided by your instructor in the Requisition Number field.
• Delete “USAID/TRAINING” from the Site field.
• Click the Display toolbar button.
• Click the Requisition Number link from the search results.</td></tr>
<tr><td>Clause Template Selection</td><td>• Search for the “Funding Opportunity” template.
• Click Funding Opportunity under the Clause Template Name.
• Click the Select All button.
• Click the Continue button.</td></tr>
<tr><td>Main / General</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Program Title</td><td>Rule of Law Program</td></tr><tr><td>Program Description</td><td>With this request for applications, USAID seeks innovative applications for a rule of law project (or projects). This RFA focuses on the area of Administrative Law and Procedure.</td></tr><tr><td>Date Issued</td><td>Enter today’s date</td></tr><tr><td>Est. Total Program Funding</td><td>2000000</td></tr><tr><td>Expected Number of Awards</td><td>1</td></tr><tr><td>Award Ceiling</td><td>2000000</td></tr><tr><td>Award Floor</td><td>1</td></tr><tr><td>Anticipated Start Date</td><td>Enter a date four months from today.</td></tr><tr><td>Anticipated Period of Performance</td><td>Enter a date four months from today through the end of fiscal year 2011.</td></tr><tr><td>Construction</td><td>No</td></tr></table>• Click the Add button below CFDA Number.</td></tr>
<tr><td>CFDA Number Selection</td><td>• Search for 98.001.
• Click the 98.001 code link.</td></tr>
<tr><td>Main / General</td><td>• Click the Contacts link on the left-hand menu.</td></tr>
</table>

Section	User Action
Main / Contacts	

Field Name	Value
Grants Specialist	Search for or enter your training ID.

- Click the **Additional Info** link on the left-hand menu.

Main / Additional Info

Field Name	Value
Ability to Apply is:	Unrestricted
Additional Information on Eligibility	Public or private U.S. educational institutions and non-governmental organizations (NGOs) are eligible to submit applications to this Request for Applications (RFA). For the purposes of this solicitation, NGOs include any entity, either non-profit or for-profit, other than a governmental organization.
Cost Sharing/Matching Required	No
Applications Due Date	Select a date one month from today's date.
Time	1600
Time Zone	LT
Funding Instrument Type	Cooperative Agreement
If Cooperative Agreement is checked, please enter a description of the substantial involvement	Please refer to the full announcement.
Funding Activity Category	Law, Justice, and Legal Services
GDA Flag	NO
Place of Performance	Enter the appropriate place of performance.
Authorized Geographical Code	000
Subcontract/Subgrant Plan Required	NO
Performance Based Contract/Results Oriented Grant	NO
Action Type	CA1
Award TEC	2000000
AIDAR/Agency Exemption to Competition	0
Competition (Yes/No)	YES
Earmark/Directive/Other	N/A

- Click the **Synopsis** link on the left-hand menu.

Synopsis

- Click the **Add** toolbar button.

Field Name	Value
Post Date	Enter today's date.
Announcement URL	http://www.grants.gov
URL Description	Grants.gov

- Click the **Add** button next to **Agency Contact**.

Section	User Action
Agency Contact	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Name:</td><td>Enter your name</td></tr><tr><td>Title:</td><td>A&A Specialist</td></tr><tr><td>Phone:</td><td>Enter your phone number</td></tr><tr><td>Email Address:</td><td>Enter your email address</td></tr><tr><td>Email Descriptor:</td><td>Contact Email</td></tr></table> • Click the **Submit** button.
Synopsis	• Click the **Validate** button. • If you receive any error messages, notify your instructor. • Click the **Continue to Preview** button. • Review information entered. To make corrections or update any information, click the corresponding **Edit** button. • Click **No** when asked, "Do you want to transmit the synopsis to Grants.gov now?" • Click **Package** on the left-hand menu.
Package / Body	• Click **Cover Page** under **Section Title.**
Clauses	• Click **Yes** under the **Fill In** column.
Clause Detail	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Fillin 1: [DATE]</td><td>Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Date Issued*</td></tr><tr><td>Fillin 2: [DATETIME]</td><td>Enter a date two weeks from today.</td></tr><tr><td>Fillin 3: [DATETIME]</td><td>Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Applications Due Date*</td></tr><tr><td>Fillin 4: [RFANUM]</td><td>Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Number*</td></tr><tr><td>Fillin 5: [RFATITLE]</td><td>Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Program Title*</td></tr><tr><td>Fillin 6: [AMOUNT]</td><td>Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Award Ceiling.*</td></tr><tr><td>Fillin 7: [NUMOFYEARS]</td><td>2</td></tr><tr><td>Fillin 8: [NEGOTIATOR]</td><td>Enter your name.</td></tr><tr><td>Fillin 9: [NEGEMAIL]</td><td>Enter your email address.</td></tr><tr><td>Fillin 10: [AO]</td><td>Enter the Agreement Officer's name.</td></tr></table> • Click the **Return** link on the left-hand menu. • Click the **Next** toolbar button.
Clause Detail	• Click **Yes** link under the *Fill In* column next to *Award Information*. <table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Fillin 1: [NUMOFAWARDS]</td><td>1</td></tr><tr><td>Fillin 2: [TYPEOFAWARD]</td><td>Cooperative Agreement</td></tr><tr><td>Fillin 3: [DLLRAWD]</td><td>$2,000,000</td></tr><tr><td>Fillin 4: [POP]</td><td>Using the **Insert PRISM Field** dropdown</td></tr></table>

Section	User Action	
		list, make selection and click the button to insert the text: *Funding Opportunity Period of Performance Start Date* Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Period of Performance End Date*
	Fillin 5:[STARTDATE]	Using the **Insert PRISM Field** dropdown list, make selection and click the button to insert the text: *Funding Opportunity Anticipated Start Date*
Clauses	◦ Click the **Return** link on the left-hand menu.	
Clause Summary	• Click the Return link on the left-hand menu.	
Package / Body	• Click the **Generate** button from the toolbar. ◦ Click the **Validations** link on the left-hand menu.	
Validations	• Correct any *Errors* generated by clicking the links to each message. • Read all *Warning* messages and correct any that should be fixed. • When no errors appear, click the **Route History** link on the left-hand menu.	
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.	

GLAAS 102 Walkthrough #9: Creating an Assistance Award

Scenario:

You are awarding IFES a cooperative agreement for a Rule of Law Program. The award will be initially funded for $476,000 with an Award TEC of $2,000,000.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Welcome Page</td><td>• Click Create on the Access Panel.</td></tr>
<tr><td>Document Create</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Document Type</td><td>Grant</td></tr>
<tr><td>Create From</td><td>Requisition</td></tr>
<tr><td>Grant Numbering Mask</td><td>Select the M/OAA Cooperative Agreement numbering mask.</td></tr>
<tr><td>Section Template</td><td>(None)</td></tr>
</table>
• Click the Continue button.
</td></tr>
<tr><td>Create Grant from Requisition</td><td>
• Enter the document number provided by your instructor in the Requisition Number field.
• Delete “USAID/TRAINING” from the Site field.
• Delete the “User ID” from the Buyer field.
• Click the Display toolbar button.
• Click the <u>Y</u> link under Select Line Items.
• Click the Select All button on the lower portion of the screen.
• Click the Create button.
</td></tr>
<tr><td>Main / General</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Award Date</td><td>Enter a date 30 days from today.</td></tr>
<tr><td>Type of Agreement</td><td>Cooperative Agreement</td></tr>
<tr><td>Award Type</td><td>Cost</td></tr>
<tr><td>Effective Date</td><td>Enter a date 35 days from today.</td></tr>
<tr><td>Completion Date</td><td>09/30/2011</td></tr>
<tr><td>Admin Office</td><td>Enter the office code of the COTR.</td></tr>
<tr><td>Issuing Office</td><td>Enter the office code of the Contracting/Agreements Office.</td></tr>
<tr><td>Sponsoring Office</td><td>N/A</td></tr>
<tr><td>Invoice Office</td><td>M/CFO</td></tr>
<tr><td>Recipient</td><td>INTFOUELE</td></tr>
<tr><td>Grant Specialist</td><td>Enter your training ID.</td></tr>
<tr><td>Type of Warrant Required</td><td>Level 2</td></tr>
<tr><td>Agreements Officer</td><td>JCOAO</td></tr>
<tr><td>Program Manager</td><td>JCOTR</td></tr>
<tr><td>Period Of Performance</td><td>Enter a date one month from today through the end of FY2011.</td></tr>
</table>
• Click the Additional Info link on the left-hand menu.
</td></tr>
</table>

Section	User Action
Main / Additional Information	

Field Name	Value
CFDA Number	98.001
Site	Enter the site of the requesting office
Payment Method	LOC
Environmental Determination Document Name	IEE
Place of Performance	Enter the relevant geographic code.
Authorized Geographical Code	000
Subcontract/Subgrant Plan Required	NO
Performanced Based Contract/Results Oriented Grant:	NO
Grants under Contracts/Contracts under Grants	NO
COTR/AOTR Assigned Date	Enter the date before the Award Date..
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all others parties?	YES
Has a hard copy been placed in the OAA contract award file?	YES
Action Type	CA1
AIDAR/Agency Exemptions to Competition	0
Leader Award Number	0
Letter of Credit Number	LOC#
Requisition Number (for mods only)	0

- Click the **Text** link on the left-hand menu.

Main / Text

Field Name	Value
Description Text	Cooperative Agreement to strengthen the rule of law and administrative law.
Header Text	Rule of Law Program

- Click the **Items** link on the left-hand menu.

Items

- Click the Item **0001** link to open the line item.

Item / General #0001

Field Name	Value
Description	Rule of Law Program
Qualifier	By Dollars
Award Type	Cost
Estimated Total Cost	2000000

- Click the **Funding** link on the left-hand menu.

Section	User Action
Item / Funding #0001	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Funding Type</td><td>Incrementally Funded</td></tr><tr><td>Incrementally Funded Through Date</td><td>09/30/2011</td></tr><tr><td>Ship To Value</td><td>2000000</td></tr><tr><td>Incrementally Funded Amount</td><td>476000</td></tr></table>• Click **Save**. • Click the **Return** link on the left-hand menu.
Items	• Click the **Package** link on the left-hand menu.
Package	• Click the **Body** link on the left-hand menu.
Package / Body	• Click the **Load Template** toolbar button.
Template Selection	• Search for "US NGO Cooperative Agreement." • Click the **Display** button. • Click the **US NGO Cooperative Agreement** link under **Clause Template Name**. • Click the **Select All** button under **Section Selection**. • Click the **Continue** button.
Package / Body	• Click the **CP – Cover Page** link under the **Section Title** column.
Clause Summary	• Click **Yes** under the **Fill In** column next to **CP4**.
Clause Detail	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>**Fillin 6 : [Total Amount of Award]**</td><td>$2,000,000</td></tr><tr><td>**Fillin 7: [Program Title]**</td><td>Rule of Law Program</td></tr></table>• Click the **Return** link on the left-hand menu.
Clause Summary	• Check the box in the **Include** column for the **GEN2** section for missions. • Click the **Yes** link under the **Fillin** column for the **GEN2** section.
Clause Detail	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>**Fill In 1: [Appropriation]**</td><td>General Funds</td></tr><tr><td>**Fill In 2: [Amount Obligated this Action]**</td><td>$476,000</td></tr><tr><td>**Fill In 3: [Total Estimated USAID Amount]**</td><td>$2,000,000</td></tr><tr><td>**Fill In 4: [Total Obligated USAID Amount]**</td><td>$476,000</td></tr><tr><td>**Fill In 5: [Cost Sharing Amount (Non-Federal)]**</td><td>N/A</td></tr><tr><td>**Fill In 14. Section C: Payment Office**</td><td>M/CFO/CMP</td></tr></table>• Click the **Return** link on the left-hand menu.
Clause Summary	• Click the **Return** link on the left-hand menu.
Package / Body	• Click the **Attachment A - Schedule** link in the **Section Title** column.
Clause Summary	• Check the box in the **Include** column next to **A.3B*AUS INCREMENTAL**. • Click the **Return** link on the left-hand menu.
Package / Body	• Click the **Attachment C – Standard Provisions** Link in the **Section Title** column.
Clause Summary	• Check the boxes under the **Include** column for all required as applicable standard provisions.

Section	User Action
	• Click **Return**.
Package / Body	• Click the **Generate** toolbar button. • Click the **Check Out** toolbar button. • Click the **Click here to Check out [Document Number]** link. • Save the document to your desktop.
Microsoft Word	• Open the document in Microsoft Word. • Locate **Attachment B – Program Description**. This is where you would cut and paste the Program Description. • Close and save the changes to the Word document and go back to your GLAAS window.
Check Out	• Click the **Click here to Return** link.
Package / Body	• Click the **Check In** toolbar button. • Click the **Skip Comments** button. • Click the **Browse** button to search for and locate the Word document. • Click the **Submit** button. • Click the **Main** link on the left-hand menu.
Main / General	• Click the **FAADS** toolbar button.
FAADS	• Select the "2006" form version. • Click the **Submit** button. **Field Name** / **Value** 2. State Application Identifier: SAI Not Applicable 3. Recipient Name: INTFOUELE 9. Recipient Zipcode: 20036 10. Type of Recipient: 12- Other NonProfit 11. Type of Action: A. New Assistance Action 24. Assistance Transaction: 05 – Cooperative Agreement (B) 28. Principal Place of Performance Code/Project location: Foreign Country • Click the **Validate** button to check the FAADS document. Correct any errors. If no errors are found, click the **Return** link on the left-hand menu. • Click the **Submit** button.
Main / General	• Click the **Validations** link on the left-hand menu.
Validations	• Ignore *Error* message for: ○ Send notification to Requestor(s) of unused funds on the Requisition? is required • Correct any other Errors generated by clicking the links to each message. • Read all Warning messages and correct any that should be fixed. • Click the **Route History** link on the left-hand menu.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button.

Section	User Action
	• Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Walkthrough #10: De-obligating a Migrated Award

Scenario:

You need to process a modification to de-obligate $22,000 on account ID 1 of a migrated contract for engineering services from Bechtel. You will reduce the Award Total Estimated Cost (Award TEC) by $22,000 for a new TEC of $166,808. The Requestor and Program Manager have prepared and approved a Requisition for Modification for the de-obligation. You must now process the Requisition for Modification into a contract modification.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Welcome Page</td><td>• Click Open on the Access Panel.</td></tr>
<tr><td>Document Selection</td><td>• Change Document Type to “Requisition.”
• Change Select From to “All Requisitions.”
• Change Requisition Type to “Requisition for Modification”.
• Enter the Requisition for Modification number provided by your instructor in the For field.
• Delete “USAID/TRAINING” from the Site.
• Click the Search toolbar button.
• When you find your Requisition for Modification number, click the <u>Y</u> link in the View Line Items Column to preview the line items.
• Click the Requisition Number to select the requisition and proceed.</td></tr>
<tr><td>Main:
General</td><td>• Click the Text link and review the Requisition for Modification.</td></tr>
<tr><td>Main:
Text</td><td>• Click the Proceed to Award toolbar button to turn this Requisition for Modification into an Award modification.</td></tr>
<tr><td>Create New Modification</td><td>• Select Contract Modification # from the Select Document Mask dropdown list.
• Select the Reason for Modification.
• Click the Create button.
• Click Yes to open the Modification.</td></tr>
<tr><td>Main:
General</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Award Date:</td><td>Enter a date two weeks from today.</td></tr><tr><td>Effective Date:</td><td>Enter a date three weeks from today.</td></tr><tr><td>Type of Warrant Required:</td><td>Level 1</td></tr><tr><td>Contracting Officer:</td><td>JCOAO</td></tr><tr><td>Invoice Office</td><td>M/CFO</td></tr><tr><td>COTR/AOTR:</td><td>JCOTR</td></tr></table>• Click the Additional Info link on the left-hand menu.</td></tr>
</table>

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Main:
Additional Info</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Payment Method</td><td>DIRECT</td></tr>
<tr><td>Place of Performance</td><td>Enter the geographic code of the place of performance</td></tr>
<tr><td>Authorized Geographical Code:</td><td>000</td></tr>
<tr><td>Performance Based Contract / Results Oriented Grant</td><td>NO</td></tr>
<tr><td>Grants Under Contract/Contracts Under Grant:</td><td>NO</td></tr>
<tr><td>COTR/AOTR Assigned Date:</td><td>Enter the date before the Award Date.</td></tr>
<tr><td>Has COTR/AOTR designation letter been assigned by all parties and delivered to the assigned COTR/AOTR and all other parties?</td><td>YES</td></tr>
<tr><td>Has a hard copy been placed in the OAA contract award file?</td><td>YES</td></tr>
<tr><td>Action Type:</td><td>UM</td></tr>
<tr><td>Award TEC:</td><td>166808</td></tr>
<tr><td>AIDAR/Agency Exemptions to Competition:</td><td>0</td></tr>
<tr><td>Earmark/Directive/Other:</td><td>N/A</td></tr>
<tr><td>Requisition Number (for mods only):</td><td>0</td></tr>
<tr><td>Send notification to Requestor(s) of unused funds on the Requisition?</td><td>NO</td></tr>
</table>
Click the Items link on the left-hand menu.
</td></tr>
<tr><td>Items</td><td>If you do not see any line items, click the Net View On toolbar button.
Click item number 0001.</td></tr>
<tr><td>Item 0001:
General</td><td>
Click the Modify toolbar button.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Amount</td><td>166808</td></tr>
</table>
Click the Return link on the left-hand menu.
</td></tr>
<tr><td>Items</td><td>Click item number 9998.</td></tr>
</table>

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Item 9998:
General</td><td>• Click the Modify toolbar button.
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Amount</td><td>166808</td></tr></table>• Click the Funding link on the left-hand menu.</td></tr>
<tr><td>Item 9998:
Funding</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Ship To Value</td><td>166808</td></tr></table>• Scroll to the bottom of the Accounting Information Detail and enter the following:
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Fully Funded Amount</td><td>78000</td></tr></table>• Click the Save button.
• Click Return on the left-hand menu.</td></tr>
<tr><td>Items</td><td>• Click item number 9999.</td></tr>
<tr><td>Item 9999:
General</td><td>• Click the Modify toolbar button.
<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Amount</td><td>-166808</td></tr></table>• Click the Return link on the left-hand menu.</td></tr>
<tr><td>Items</td><td>• With “Net View: On” the award should display the following amounts:
o Obligation: $166,808
o Total Amount: $166,808
• Click the Net View Off toolbar button.</td></tr>
<tr><td>Items</td><td>• Click the Net View Off toolbar button.
• With “Net View: Off” the award should display the following amounts:
o Obligation: ($22,000)
o Total Amount: ($22,000)
• Click the Main link on the left-hand menu.</td></tr>
<tr><td>Main:
General</td><td>• Click the Change Text link on the left-hand menu.</td></tr>
<tr><td>Main:
Change Text</td><td>• Click the Generate toolbar button.
• Type “The purpose of this modification is to de-obligate $22,000 and reduce the Award TEC to $166,808” in the box with the generated text.
• Click the Package link on the left-hand menu.</td></tr>
<tr><td>Package:
Cover Page</td><td>• Click the Change Form toolbar button to select the SF-30 for your modification.
• Type “SF-30” in the For search field.
• Click Display.
• Click the SF-30 link.
• Click the Edit toolbar button.</td></tr>
</table>

Section	User Action
SF-30 Modification of Contract	• Type "Deobligation after close" in ***13D*** **(Specify type of modification and authority)**. • Click the **Submit** button.
Package: Cover Page	• Click the **Validations** link on the left-hand menu.
Validations	• Correct any Errors generated by clicking the links to each message. • Click the **Route History** link on the left-hand menu.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Walkthrough #11: Modifying an Award to Add Funding

Scenario:

You need to modify an existing Personal Services Contract (PSC) to add funds to the Total Compensation line item. $47,500 was previously obligated on this CLIN; you will now obligate an additional $3,500. The Award TEC will be raised to $108,500.

Line Item	Description	Amount Obligated This Action	Total Obligated Amount	Total Amount
0001	Total Compensation	$3,500	$51,000	$51,000
0002	Total Other Costs	$0	$2,000	$2,000
	Totals:	**$3,500**	**$53,000**	**$53,000**

Section	User Action
Welcome Page	• Click **Open** on the Access Panel.
Document Selection	• Change **Document Type** to "Requisition." • Change **Select From** to "All Requisitions." • Change **Requisition Type** to "Requisition for Modification." • Enter the Requisition for Modification number provided by your instructor in the **For** field. • Delete "USAID/TRAINING" from the **Site**. • Click the **Search** toolbar button. • When you find your Requisition for Modification number, click the **Y** link in the **View Line Items** Column to preview the line items. • Click the **Requisition Number** to select the requisition and proceed.
Main: General	• Click the **Text** link and review the Requisition for Modification.
Main: Text	• Click the **Proceed to Award** toolbar button to turn this Requisition for Modification into an Award modification.
Create New Modification	• Select **Contract Modification #** from the **Select Document Mask** dropdown list. • Select the **Reason for Modification**. • Click the **Create** button. • Click **Yes** to open the Modification.
Main: General	**Field Name** / **Value** Award Date: — Enter a date two weeks from today. Effective Date: — Enter a date three weeks from today. Invoice Office — Enter the office code where invoices should be sent. • Click the **Additional Info** link on the left-hand menu.

Section	User Action
Main: Additional Info	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Payment method</td><td>Direct</td></tr><tr><td>Place of Performance</td><td>Enter the relevant place of performance code.</td></tr><tr><td>Authorized Geographical Code:</td><td>Enter the relevant geographic code.</td></tr><tr><td>Performance Based Contract/Results Oriented Grant</td><td>NO</td></tr><tr><td>COTR/AOTR Assigned Date</td><td>Enter the date before the Award Date.</td></tr><tr><td>Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?</td><td>YES</td></tr><tr><td>Has a hard copy been placed in the OAA contract award file?</td><td>YES</td></tr><tr><td>Requisition Number (for mods only) is required</td><td>0</td></tr><tr><td>Send notification to Requestor(s) of unused funds on the Requisition?</td><td>NO</td></tr></table> • Click the **Items** link on the left-hand menu.
Items	• Click item number **0001**.
Item 0001: General	• Click the **Funding** link on the left-hand menu.
Item 0001: Funding	• Click the **Account ID 3** • Verify that the **Sub-Object Code (SOC)** is "4100302." • Verify that the **Obligated Amount** for Account ID 3 is $3,500.00. • Click the **Return** button link on the left-hand menu.
Items	• Verify that **Net View On** is in the award header. o Your Contract should have the following amounts: ▪ **Obligation:** $53,000.00 ▪ **Total Amount without Options:** $53,000.00 ▪ **Total Amount:** $53,000.00 • Click the **Net View Off** toolbar button. o Your Contract should have **Obligation**: $3,500.00 • Click the **Package** link on the left-hand menu.
Package: Cover Page	• Click the **Change Form** toolbar button to select a cover page.
Form Selection	• Click the **SF-30** link.
Package: Cover Page	• Click the **Edit** toolbar button.

Section	User Action
SF-30 Modification of Contract	• Type "Incremental funding" in the field below **13. D Other (Specify type of modification and authority)**. • Click the **Submit** button.
Package: Cover Page	• Click the **Main** link on the left-hand menu.
Main: General	• Click the **Text** link on the left-hand menu.
Main: Text	**Field Name** / **Value** Description Text: The purpose of this modification is to add funding to the salaries CLIN. Header Text: The purpose of this modification is to add funding to the salaries CLIN.
Main: Text	• Click the **FPDS** toolbar button. • In the separate FPDS-NG window, click the **Validate** button. • Click the **Save Draft** button. • Close the FPDS-NG window. • Click the **Change Text** link on the left-hand menu.
Main: Change Text	• Click the **Generate** toolbar button (edit the note, if necessary). • Click the **Validations** link on the left-hand menu.
Validations	• Correct all *Errors* generated. • Read all *Warning* messages and correct any that should be fixed. • When no errors appear, click the **Route History** link on the left-hand menu.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Demonstration: Close-Out

No talking points are provided, but you should only focus on the actual functionality of the system and not their policy.

Section	User Action
Welcome Page	• Search for and open a contract ready to be closed out.
Main / General	• Click the **Closeout** toolbar button. • Click the **Continue** button.
Closeout Checklist Template Selection	• Check the **Include Public** box. • Click the **Display** toolbar button. • Select the **Contract Specialist <= $500,000** template. • Click the **Continue** button.
Buyer Assignment: Assign To	• Click the ... **button** next to the **New Buyer** field. • Search for and select your training ID. • Click the **Assign** button.
Buyer Assignment: Assign From	• GLAAS returns you to the *Buyer Assignment: Assign From* screen. You have successfully reassigned the Buyer on this Requisition. • Click the **Cancel** button to exit this screen.
System Utilities	• GLAAS returns you to the *System Utilities* screen. • Click the **Return to Home** link on the left-hand menu to return to the GLAAS *Welcome Page*.
Welcome Page	• GLAAS returns you to the *Welcome Page*. • Click the **Inbox** link on the left-hand menu to go to the GLAAS *Inbox*.
Inbox	• Click the **Buyer Workload** link in your GLAAS Inbox. • The Requisition number you just reassigned should now appear on the top of your **Buyer Workload** queue. • Click the **Return to Home** link on the left-hand menu to return to the GLAAS *Welcome Page*.

GLAAS 102 Exercise # 1: Buyer Reassignment

Scenario:

A requisition for a non-competitive contract for US PSC has been created, approved and released in GLAAS. Acting as the CO/AO, you need to reassign the Buyer (currently "Trainer9") on the Requisition.

Section	User Action
Welcome Page	• Click the **System > Utilities** link.
System Utilities	• Click the **Assign > Buyer** link.
Buyer Assignment: Assign From	• Select the **Buyer** radio button. • Use the **lookup button** ( ) to search for and select the user ID "TRAINER9." • In the **Requisition Number** field, enter the requisition provided by your instructor. • Click the **Display** button. • Look for the **Requisition Number** that matches the number your instructor gave you. • When you find it, click the **Select** checkbox next to it. • Click the **Continue** button.
Buyer Assignment: Assign To	• Click the lookup button ( ) next to the **New Buyer** field. • Search for and select your training **User ID#**. • Click the **Assign** button.
Buyer Assignment: Assign From	• GLAAS returns you to the **Buyer Assignment: Assign From** screen. You have successfully reassigned the Buyer on this Requisition. • Click the **Cancel** button to exit this screen.
System Utilities	• GLAAS returns you to the **System Utilities** screen. • Click the **Return to Home** link on the left-hand menu to return to the GLAAS **Welcome Page**.
Welcome Page	• GLAAS returns you to the **Welcome Page**. • Click the **Inbox** link on the left-hand menu to go to the GLAAS **Inbox**.
Inbox	• Click the **Buyer Workload** link in your GLAAS Inbox. • The Requisition number you just reassigned should now appear in your **Buyer Workload** queue. • Click the **Return to Home** link on the left-hand menu to return to the GLAAS **Welcome Page**.

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GLAAS 102 Exercise # 2: Creating a Milestone Plan

Scenario:

You have been assigned as the buyer for a non-competitive contract for a US PSC. Before you begin creating this award, you need to set up a procurement milestone plan.
You will:

1. Create a Milestone Plan for this procurement.
2. Link the Milestone Plan to a GLAAS Requisition.
3. Baseline the Milestone Plan.

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Welcome Page</td><td>Create</td></tr>
<tr><td>Document Type</td><td>Milestone Plan</td></tr>
<tr><td>Milestone Plan Name</td><td>Enter a unique name using the format: “MS-Site-FY-Free Form Description” (e.g., MS-000-10-PSC001)</td></tr>
<tr><td>Milestone Template</td><td>Search the Public folder and select PS Basic Personal Services Contract (PSC)</td></tr>
<tr><td>Milestone Plan Date</td><td>Start Date = “Current Date”
• Click the Continue button.</td></tr>
<tr><td>Main / General</td><td>• Click the Edit button.
• Enter the Milestone Description:
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Description</td><td>PSC Salary/ Benefits / Training</td></tr>
</table>
• Milestone Steps to update:
<table>
<tr><td>6 – Obtain Necessary Reviews</td><td>PALT = 0</td></tr>
<tr><td>8 – Conduct Q & A</td><td>PALT = 0</td></tr>
<tr><td>Insert a step above Milestone Step #6</td><td>PRE_RFP_DO – Prepare RFP Document</td></tr>
<tr><td colspan="2">At Milestone Step # 27 (Complete Awd Documents), select your student ID as the Responsible Party.</td></tr>
</table>
• Select the Notification icon for Milestone Step 26.</td></tr>
<tr><td>Notification Detail</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Type of Notification</td><td>Reminder of Action</td></tr>
<tr><td>User ID</td><td><Your Student ID></td></tr>
<tr><td>Number of Calendar Days in Advance</td><td>15</td></tr>
</table>
• Click the Generate button to generate a message. Edit if you wish.
• Click the Submit button to save the notification.
• Click the Return link to go back to the Milestone Plan main screen.</td></tr>
<tr><td>Main / General</td><td>• Scroll to the bottom of the screen and click the Submit button.
• Click the Link toolbar button.</td></tr>
</table>

Link Document	Link Options	Requisition
	Requisition Number	Click the **Link** button [···] to search for and link the Requisition provided by your instructor.
	• Click **Submit** to go back to the Milestone Plan main screen.	
Main/General	• Click the "**Set Baseline**" button to save the base-lined plan. • Click **Yes** when prompted.	
Main / General	• Click the **Return to Home** link to go back to the **Welcome Page**.	

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GLAAS 102 Exercise #3: De-obligating an Award

Scenario:

You need to modify a Purchase Order that previously obligated $48,525 for computer hardware. You now need to de-obligate $3,500 and reduce the Award TEC to $45,025.

Section	User Action
Welcome Page	• Click **Open** on the Access Panel.
Document Selection	• Change **Document Type** to "Requisition." • Change **Select From** to "All Requisitions." • Change **Requisition Type** to "Requisition for Modification." • Enter the Requisition for Modification number provided by your instructor in the **For** field. • Delete "USAID/TRAINING" from the **Site**. • Click the **Search** toolbar button. • When you find your Requisition for Modification number, click the **Requisition Number** to select the requisition and proceed.
Main: Text	• Click the **Text** link and review the Requisition for Modification. • Click the **Proceed to Award** toolbar button to turn this Requisition for Modification into an Award modification.
Create New Modification	• Select **Contract Modification #** from the **Select Document Mask** dropdown list. • Select the **Reason for Modification**. • Click the **Create** button. • Click **Yes** to open the Modification.
Main: General	**Field Name** / **Value** Award Date: — Enter a date one week from today. Effective Date: — Enter the start date of the Period of Performance. Invoice Office: — Enter the office code where invoices should be sent. Type of Warrant — Level 1 Contracting Officer: — JCOAO COTR/AOTR: — JCOTR • Click the **Additional Info** link on the left-hand menu.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Main:
Additional Info</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Place of Performance:</td><td>000</td></tr>
<tr><td>Payment Method:</td><td>DIRECT</td></tr>
<tr><td>Action Type:</td><td>AC</td></tr>
<tr><td>Award TEC:</td><td>45025</td></tr>
<tr><td>Requisition Number (for mods only)</td><td>Enter the requisition number provided by your instructor.</td></tr>
</table>
Click the Items link on the left-hand menu.
</td></tr>
<tr><td>Items</td><td>You should not see any line items. Click the Net View On toolbar button to turn on the Net View. You should now see the line items.
Click the line item 0001 link.</td></tr>
<tr><td>Item 0001:
General</td><td>Click the Modify toolbar button to allow this line item to be modified.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Amount</td><td>45025</td></tr>
</table>
Click the Funding link on the left-hand menu to continue.</td></tr>
<tr><td>Item 0001:
Funding</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Ship To Amount</td><td>45025</td></tr>
</table>
Scroll to the bottom of the Accounting Information Detail and enter the following:
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Amount</td><td>45025</td></tr>
</table>
Click the Save button.
Click the Return link on the left-hand menu.</td></tr>
<tr><td>Items</td><td>With Net View On, your Award should display the following Amounts:
Obligation: $45,025
Total Amount: 45,025
Click the Net View Off button.
With Net View Off, your Award should display the following amounts:
Obligation: ($3,500)
Total Amount: ($3,500)
Click the Main link on the left-hand menu.
Click the Change Text link on the left-hand menu.</td></tr>
<tr><td>Main:
Change Text</td><td>Click the Generate toolbar button.
Insert the text “The purpose of the modification is to de-obligate $3,500 on CLIN 0001 and reduce the Award TEC to $45,025.”
Click the Package link on the left-hand menu.</td></tr>
<tr><td>Package:
Cover Page</td><td>Click the Change Form toolbar button to select a cover page.</td></tr>
</table>

Section	User Action
Form Selection	• Click the **SF-30** link.
Package: Cover Page	• Click the **Edit** toolbar button.
SF-30 Modification of Contract	• Type "De-obligate funding and reduce Award TEC" in the field below **13. D Other (Specify type of modification and authority).** • Click the **Submit** button. • Click the **Validations** link on the left-hand menu.
Validations	• Correct all *Errors* generated by clicking the links to each message. Fix the errors, and click the **Validations** link again to verify. • Read all *Warning* messages and correct any that must be fixed. • Ignore *Warning* message for: ○ CISCO SYSTEMS does not have an active CCR registration. • When no errors appear, click the **Main** link on the left-hand menu.
Main: General	• Click the **FPDS** toolbar button.
FPDS	• Click the **Validate** button. • Click the **Save Draft** button. • Close the FPDS browser window.
Main: General	• Click the **Route History** link on the left-hand menu.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Exercise #4: Amending a Solicitation

Scenario:

You need to amend the Solicitation for an educational program to extend the responses due date for another 15 days.

<table>
<tr><th>Section</th><th>User Data</th></tr>
<tr><td>Welcome Page</td><td>• Search for and select the Solicitation created in Walkthrough # 6.</td></tr>
<tr><td>Main / General</td><td>• Click the Amend button.</td></tr>
<tr><td>Create Amendment</td><td>• Click the Create button.</td></tr>
<tr><td>Main / General</td><td><table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Responses Due Date</td><td>Extend the date by 15 days</td></tr></table>• Click the Package link on the left-hand menu.</td></tr>
<tr><td>Package / Cover Page</td><td>• Click the Change Form button on the toolbar.
• Select the SF-30.
• Click the Edit button.<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>11. The hour and date for receipt of offers</td><td>Click “Is extended” radio button.</td></tr><tr><td>Number of Copies to Return</td><td>3</td></tr></table>• Click the Submit button.
• Click the Main link on the left-hand menu.</td></tr>
<tr><td>Main / General</td><td>• Click the Change Text link.</td></tr>
<tr><td>Main / Change Text</td><td>• Click the Generate button (edit the note if necessary).
• Click the Validations link on the left-hand menu.</td></tr>
<tr><td>Validations</td><td>• Correct all Errors generated by clicking the links to each message. Fix the errors, and click the Validations link again to verify.
• Read all Warning messages and correct any that must be fixed.
• When no errors appear, click the Route History link on the left-hand menu.</td></tr>
<tr><td>Route History</td><td>• Click the Route button to select For Approval and click the Submit button.
• Click New Route and Submit.
• Click the Add button and select the link for the User ID provided by your instructor.
• Set the Route Role to “CO/AO” and the Type to “Approval.”
• Click the Send button.
• Click the link for Click here to continue Routing your document.
• Click the Skip Comments button.
• Click the Welcome Page link to return to the Welcome Page.
• The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.</td></tr>
</table>

GLAAS 102 Exercise #5: Creating an Inter-Agency Agreement

Scenario:

There is a need to process a Participating Agency Program Agreement with the United States Geological Survey to develop a program to provide technical assistance. This program is to develop an early warning system for famine and related hazards.

A Requisition has already been created and released in GLAAS. You will need to find it and turn it into an IAA.

The IAA will have three (3) line items when you are finished:

Line Item	Description	Total Estimated Cost	Total Obligated Amount
0001	Technical Support	$219,713	$219,713
0002	Regional Hazard Detection	$675,572	$675,572
0003	Standards and Protocols	$110,832	$110,832
	Totals:	**$1,006,117**	**$1,006,117**

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value** Document Type: IAA Create From: Requisition IAA Numbering Mask: Select the appropriate numbering mask. Section Template: (None) • Click the **Continue** button.
Create IAA from Requisition	• Search for the Requisition and select the Y under the **Select Line Items.** • **Select All** the line items from the Requisition that your instructor provided. • Click the **Create** button.
Main: General	**Field Name** / **Value** Invoice Office: M/CFO Type of Warrant: Level 2 Contracting Officer: JCOAO COTR: JCOTR Period of Performance: Enter a date one month from today through 9/30/2011 • Click the **Additional Info** link on the left-hand menu.

Main:
Additional Info

Field Name	Value
Originating Office	AFR/SP
Payment Method	IPAC
Place of Performance	000
Authorized Geographical Code	000
Subcontract/Subgrant Plan Required	NO
Performance Based Contract/Results Oriented Grant	NO
AIDAR/Agency Exemptions to Competition	0
Requisition Number (for mods only)	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

- Click the **Agency** link on the left-hand menu.

Agency:
General

- Click the **Servicing** link.

Field Name	Value
Code	Search for "USGESU" (U S Geological Survey National Center)

- Click the **Submit** button.
- Click the **Package** link on the left-hand menu.

Package:
Cover Page

- Click the **Change Form** button and then click the **IAA (01-01)** link.
- Click the **Validations** link on the left-hand menu.

Validations

- Correct all *Errors* generated by clicking the links to each message. Fix the errors, and click the **Validations** link again to verify.
- Read all *Warning* messages and correct any that must be fixed.
- Ignore *Warning* message for:
  - A Milestone Plan must be linked and the baseline set in the Milestone Plan Option.
- When no errors appear, click the **Route History** link to route this document to the Contracting Officer.

Route History

- Click the **Route** button to select **For Approval** and click the **Submit** button.
- Click **New Route** and **Submit.**
- Click the **Add** button and select the link for the **User ID** provided by your instructor.
- Set the **Route Role** to "CO/AO" and the **Type** to "Approval."
- Click the **Send** button.
- Click the link for **Click here to continue Routing your document**.
- Click the **Skip Comments** button.
- Click the **Welcome Page** link to return to the Welcome Page.
- The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Exercise #6: Creating a Blanket Purchase Agreement (BPA)

Scenario:

Create a new Blanket Purchase Agreement (BPA) in GLAAS to allow the agency to buy office supplies. A Requisition committing $500,000 for the BPA has already been created, approved and released. Use that Requisition to create the BPA.

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value** Document Type: BPA Create From: Requisition BPA Numbering Masks: Select the appropriate numbering mask for a BPA Set-Up. Section Template: Select New • Click the **Continue** button.
Requisition Selection	• Search for the Requisition Number provided by your instructor. • Click the **Requisition Number** link to continue.
Clause Template Selection	• Search for and select the clause template name "Simplified Acquisition Procedures." • At the bottom of the screen, check the boxes to select sections **A through I**. • Click the **Continue** button.
Main / General	**Field Name** / **Value** Issuing Office: M/OAA/A Vendor: STAPLES Type of Warrant Required: Level 1 Contracting Officer: JCOAO COTR: JCOTR Period of Performance: Enter a date one month from today through 9/30/2012 • Click the **Additional Info** link on the left-hand menu to continue.
Main / Additional Info	**Field Name** / **Value** BPA Expiration Date: Enter the end date of the Period of Performance NAICS Code: 453210 – Office Supplies and Stationary Stores Performance-Based Service Acq: No – Service where PBA is not used Cost Acctg Standards Clause: Not Applicable exempt from CAS Use of Recovered Material: FAR 52.223-4 Included Commercial Item Acq. Procedures: Commercial Item CO's Determination of Bus. Size: Other Than Small Business Payment Method: DIRECT – Direct Reimbursement Place of Performance: Enter the relevant geographic code Subcontract/Subgrant Plan Required: NO Performance Based Contract/Results Oriented Grant: NO

Section	User Action
	COTR Assigned Date: Enter the date before the Award Date Has COTR designation letter been signed by all parties and delivered to the assigned COTR and all other parties?: YES Has a hard copy been placed in the OAA contract award file?: YES AIDAR Exemptions to Competition: 0 Requisition Number (for mods only): 0 • Check the amount in the Award TEC field to make sure it is accurate. • Click the **Text** link on the left-hand menu to continue.
Main / Text	Header Text: Click the **Statements** button and select the **MAXIMUM CONTRACT CEILING** link. Replace the text "(*Filling a Contract Type here*)" with "**BPA**". Replace the text "(*Filling the Maximum Dollar Amount here*)" with "**$500,000.00**" • Click the **Limits** link on the left-hand menu to continue.
Main / Limits	**Field Name** / **Value** Minimum Amount Per Call: 150 Maximum Amount Per Call: 1250 Total Amount of Calls not to Exceed: 500000 • Click the **Summary** link on the left-hand menu to continue.
Main / Summary	• Review the information you have entered on your BPA thus far. • Click the **Edit** buttons to take you to the appropriate screens to edit information, as necessary.
Vendor	• Check to make sure you have the correct Vendor Address, Address Code and DUNS number. • Click the **Package** link to continue.
Package / Cover Page	• Click the **Change Form** button. • Select the **SF-26**. • Click the **Body** link on the left-hand menu.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Package / Body</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Clause Grouping</td><td>All Reference then Full Text per database</td></tr>
</table>

Click the Configure toolbar button and delete Sections K – M.
Click the Return link on the left-hand menu.
Click the Remove UCF toolbar button and click OK.
Click the Load Template toolbar button.
Search for and select the “Simplified Acquisition Procedures-AIDAR” template.
Select sections A and G, and then click Continue.
For the Always Required source title:
Select the Merge into radio button and then select the option “Contract Clauses.”
For the Required Clause; Merge into UCF Section G source title:
Select the Merge into radio button and then select the option “Contract Administration Data.”
After everything has been selected, click the Submit button.
Click the Generate toolbar button.
Click the Submit button.
Click the Summary Report link on the left-hand menu.
</td></tr>
<tr><td>Summary Report</td><td>

The BPA Summary Report summarizes the overall Setup. You can click the Print toolbar button to print out a copy for review.
Click the Validations link on the left-hand menu to check the entire BPA for errors.
</td></tr>
<tr><td>Validations</td><td>

Correct all Errors generated by clicking the links to each message. Fix the errors, and click the Validations link again to verify.
Read all Warning messages and correct any that must be fixed.
Ignore Warning messages for:
A Milestone Plan must be linked and the baseline set in the Milestone Plan Option.
STAPLES does not have an active CCR registration.
When no errors appear, click the Main link on the left-hand menu.
</td></tr>
<tr><td>Main / General</td><td>

Click the FPDS toolbar button.
Inside the FPDS screen, click the Validate button.
Click the Save Draft button.
Close the FPDS window.
Click the Route History link on the left-hand menu to continue.
</td></tr>
<tr><td>Route Screen</td><td>

Click the Route button to select For Approval and click the Submit button.
Click New Route and Submit.
Click the Add button and select the link for the User ID provided by your instructor.
Set the Route Role to “CO/AO” and the Type to “Approval.”
Click the Send button.
Click the link for Click here to continue Routing your document.
Click the Skip Comments button.
Click the Welcome Page link to return to the Welcome Page.
The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.
</td></tr>
</table>

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GLAAS 102 Exercise #7: Creating a BPA Call

Scenario:

Create a BPA Call to purchase office supplies from a Blanket Purchase Agreement. The Requisition has already been created, approved and released. Use that Requisition to create a BPA Call that references your BPA.

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value** Document Type: BPA Call BPA Number: Search for and select the number of the BPA you just created. Create From: Requisition BPA Call Numbering Masks: Select the appropriate numbering mask for a BPA Call. Section Template: None • Click the **Continue** button.
Requisition Selection	• Search for the Requisition Number provided by your instructor. • Click the Y link in the Select Line Items column to pull line items from that Requisition onto your BPA Call. • Check the boxes next to the items you want to bring onto your BPA Call. • Click the **Create** button to continue.
Main / General	**Field Name** / **Value** Invoice Office: M/CFO Type of Warrant Type: Level 1 Period of Performance: Enter a date two months from today through 9/30/2011 • Click the **Additional Info** link to continue.
Main / Additional Info	**Field Name** / **Value** Performance-Based Service Acq: No – Service where PBA is not used Cost Acctg Standards Clause: Not Applicable – Exempt from CAS Purchase Card Payment Method: No Use of Recovered Material: FAR 52.223-4 Included Commercial Item Acq. Procedures: Commercial Item CO's Determination of Bus. Size: Other Than Small Business Payment Method: DIRECT Place of Performance: 000 Subcontract/Subgrant Plan Required: NO Performance Based Contract/Results Oriented Grant: NO COTR/AOTR Assigned Date: Enter the date before the Award Date. Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?: YES

Section	User Action
	Has a hard copy been placed in the OAA contract award file? — YES AIDAR/Agency Exemptions to Competition — 0 Requisition Number (for mods only) — 0 Send notification to Requestor(s) of unused funds on the Requisition? — YES • Click the **Summary** link on the left-hand menu to continue.
Main / Summary	• Review the information you have entered on your BPA Call thus far. • Click the **Edit** buttons to take you to the appropriate screens to edit information, as necessary. • Click the **Vendor** link on the left-hand menu to continue.
Vendor	• Check the Vendor Address information to make sure you have the correct Vendor, Address, Address Code and DUNS number. • Click the **Package** link on the left-hand menu to continue.
Cover Page	• Click the **Change Form** toolbar button. • Select the **OF347(6-95)** form. • Click the **Attachments** link on the left-hand menu to continue.
Attachments	• Click the **Library** toolbar button. • Search for and select the file "AID Acquisition Data Sheet (AID ADS)." • Click the **Submit** button to add this attachment. • Click the **Summary Report** link to continue.
Summary Report	• The **Summary Report** summarizes the overall BPA Call. You can click the **Print** toolbar button to print out a copy for review. • Be sure to look at the **Line Item Type Summary** to see the Item Amounts divided by Line Item Type. • Click the **Validations** link on the left-hand menu to check the entire BPA Call for errors.

Validations	• Correct all *Errors* generated by clicking the links to each message. Fix the errors, and click the **Validations** link again to verify.
	• Read all *Warning* messages and correct any that must be fixed.
	• Ignore *Warning* messages for:
	  o Award date is earlier than the BPAs period of performance.
	  o A Milestone Plan must be linked and the baseline set in the Milestone Plan Option.
	  o STAPLES does not have an active CCR registration.
	• When no errors appear, click the **Route History** link to route this document to the Contracting Officer.

Route Screen	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page.

Now acting as a Contracting Officer, you will approve and release the BPA Call you just created.

Welcome Page	• Click the link to your **Inbox**.
Inbox	• Click the link to your **For Approval** Folder. • Your Contract should be in the **For Approval** folder. Click the **Document Number** link to open the document.
Main / General Information	• GLAAS brings you to the General Information screen of the BPA Call. • Click the **FPDS** link to approve the FPDS record. Normally in FPDS, you would click Validate, correct any errors and then click Approve. However, the training version of FPDS will not let you approve a record so you will close this window and return to GLAAS.
Main / General Information	• Click the **Approve** button in the toolbar. • Enter your **Approval Password** and any comments you feel necessary. • Click the **Mark Approved** button. • GLAAS asks you if you want to release this document. Click **Yes**. • A warning will pop up saying "Unable to approve FPDS record. Would you like to continue release?" Click **Yes**. • GLAAS takes you back to the General Information screen. The Version field should read **Base – Released**. • You have successfully approved and released this BPA Call. • Click the **Return to Home** link to return to the GLAAS Welcome Page.

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GLAAS 102 Exercise #8: Creating an IQC

Scenario:

You have been assigned as an A&A Specialist on a request for an Indefinite Quantity Contract to procure local training services in support of an environmental awareness program. The IQC has been awarded to ACDI/VOCA and is a single award IQC.

The IQC will have the following line items and you will obligate the guaranteed minimum of $14,500.

Line Item	Description	Ceiling / Total Estimated Cost	Total Obligated Amount
0001	Labor / with Initial Obligation	$10,015,000	$14,500
	Totals:	**$10,015,000**	**$14,500**

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value**: Document Type: Contract Create From: Requisition Contract Numbering Masks: Select the M/OAA Indefinite Qty Contract numbering mask. Selection Template: Select New Report to FPDS as a Stand-alone Contract: Leave box unchecked MAS Number: <Leave Blank> • Click the **Continue** button.
Create Contract from Requisition	• Search for the **Requisition** provided by your instructor. • Click the **Y** link in the Select Line Items column to pull line items from that Requisition onto your IQC. • Click the **Select All** button. • Click the **Create** button.
Clause Template Selection	• Search for and select **Indefinite Delivery**. • Scroll down and check the items for **Sections A – J**. • Click the **Continue** button.
Main / General	**Field Name** / **Value**: Award Type: Indefinite-quantity Completion Date: One year out from the end of the current **Fiscal Year**. Invoice Office: M/CFO Vendor: ACDIVOCA Type of Warrant Required: LEVEL3 Contracting Officer: JCOAO COTR/AOTR: JCOTR Period of Performance: "Current Date" and "One year out" • Click the **Additional Info** link on the left-hand menu.

Section	User Action
Main / Additional Info	

Field Name	Value
NAICS Code	541690 – Other scientific and technical consulting services
Performance-Based Service Acq	No – Service where PBA is not used
Cost Acctg Standards Clause	Yes – CAS clause included
Purchase Card Payment Method	No
Use of Recovered Material	No Clauses Included
Commercial Item Acq. Procedures	Commercial item Procedures not used
CO's Determination of Bus. Size	Other Than Small Business
Payment Method	DIRECT
Place of Performance	000
Authorized Geographical Code	000
Subcontract/Subgrant Plan Required	NO
Performance Based Contract/ Results Oriented Grant	NO
Grants Under Contract/Contracts Under Grant	NO
COTR/AOTR Assigned Date	Enter the date before the Award Date.
Has COTR/AOTR designation letter been assigned by all parties and delivered to the COTR/AOTR and all other parties?	YES
Has hard copy been placed in the OAA contract award file?	YES
AIDAR/Agency Exemptions to Competition?	0
Requisition Number (for mods only)	0
Send notification to Requestor(s) of unused funds on the Requisition?	YES

- Click the **Text** link on the left-hand menu.

Main / Text

Field Name	Value
Description	Environmental Awareness Award
Header Text	Environmental Awareness Award

- Click the **Limits** link on the left-hand menu.

Main / Limits

Field Name	Value
Minimum Order Amount	10000
Maximum Order Amount	56000
Minimum Amount	14500
Contract Ceiling	10015000

- Click the **Notification** ( ) icon next to the **Contract Ceiling** field.
- Enter your **User ID** and set the notification to be sent when the *Total Amount of Task/Delivery Orders….* **80** *% of Contract Ceiling.*
- Click the **Generate** button.
- Click the **Submit** button.
- Click the **Return** link on the left-hand menu.

Guaranteed Minimum	Check Box
Print Limits	Check Box

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td></td><td>• Click the Items link on the left-hand menu.</td></tr>
<tr><td>Items / General #1</td><td>• Click the Item number link 0001.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Amount</td><td>10015000</td></tr>
</table>
• Click the Orders link on the left-hand menu.</td></tr>
<tr><td>Items / Orders #1</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Allow Delivery / Task Orders</td><td>Yes</td></tr>
<tr><td>If yes, complete the following</td><td>Delivery / Task Order Obligates</td></tr>
</table>
• Click the Funding link on the left-hand menu.</td></tr>
<tr><td>Items / Funding</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Ship To Value</td><td>10015000</td></tr>
<tr><td>Fully Funded Amount</td><td>14500</td></tr>
</table>
• Click Save.
• Click the Return link on the left-hand menu.
• Click the Vendor link on the left-hand menu.</td></tr>
<tr><td>Vendor</td><td>• Check the Vendor Address information to confirm you have the correct Vendor, Address, Address Code (for currency) and DUNS number.
• Click the Synopsis link on the left-hand menu.</td></tr>
<tr><td>Synopsis</td><td>• Click the Add button to add an Award Notice to send to FedBizOpps.
<table>
<tr><td>Web Link URL</td><td>www.usaid.gov</td></tr>
<tr><td>Email Address</td><td>Enter your e-mail address.</td></tr>
</table>
• Click the Submit button.
• Click No to save your Synopsis.
• Click the Package link on the left-hand menu.</td></tr>
<tr><td>Package / Cover Page</td><td>• Click the Change Form toolbar button.
• Select the SF-26 form and review the Cover Page.
• Click the Body link on the left-hand menu.</td></tr>
<tr><td>Package / Body</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Clause Grouping</td><td>All Reference then Full Text per database</td></tr>
</table>
• Click the Configure toolbar button and delete Sections K – M.
• Click the Return link on the left-hand menu.
• Click the Remove UCF toolbar button and click OK.
• Click the Load Template toolbar button.
• Search for and select the “Indefinite Delivery-AIDAR” template.
• Select sections A <u>and</u> G, and then click Continue.
• For the Always Required source title:
  • Select the Merge into radio button and then select the option “Contract Clauses.”
• For the Required Clause; Merge into UCF Section G source title:
  • Select the Merge into radio button and then select the option “Contract Administration Data.”
• After everything has been selected, click the Submit button.
• Click the Generate toolbar button.
• Click the Submit button.
• Click the Main link on the left-hand menu.</td></tr>
</table>

Section	User Action
Main / General	• In production, you would now create the FPDS-NG record before routing the contract to the CO for approval. • Confirm the **Obligation** for this award is *$14,500* and the **Total Amount** is for *$10,015,000*. • Click the **Validations** link on the left-hand menu.

Validations	• Correct all *Errors* generated by clicking the links to each message. Fix the errors and click the **Validations** link again to verify.
	• Read all *Warning* messages and correct any that must be fixed.
	• Ignore *Warning* message for:
	  o Item: 0001 – Funds are obligated for an item where Delivery Order is set to Obligate.
	• Ignore *Warning* messages in training only:
	  o ACDI/VOCA does not have an active CCR registration
	  o A Milestone Plan must be linked and the baseline set in the Milestone Plan Option
	• Click the **Route History** link on the left-hand menu to continue.

Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Exercise #9: Creating a Delivery/Task Order

Scenario:

You will need to create a task order against a single award IQC for training services for an environmental awareness program. The Requisition has already been created for $10,000.

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value** Document Type: Delivery / Task Order Contract Number: Use the IQC listed on your reference sheet Create From: Requisition Delivery/Task Order Numbering Mask: Select the M/OAA numbering mask for a DO Against USAID IQC. Section Template: None • Click the **Continue** button.
Create from Requisition	• Search for the Requisition Number provided by your instructor. • Click the **Y** link in the **Select Line Items** column. • At the bottom of your screen, click the **Select All** button to include the items from the Requisition. • Click the **Create** button to continue.
Main / General	**Field Name** / **Value** Invoice Office: M/CFO Type of Warrant: Level 1 Period of Performance: "Today's Date" to "3 Months Out" • Click the **Additional Info** link on the left-hand menu.
Main / Additional Info	**Field Name** / **Value** Performance-Based Service Acq: No – Service where PBA is not used Cost Acctg Standards Clause: Yes – CAS clause included Purchase Card Payment Method: No Use of Recovered Material: No Clauses Included Commercial Item Acq. Procedures: Commercial Item Procedures not used CO's Determination of Bus. Size: Other Than Small Business Payment Method: DIRECT Place of Performance: 000 Authorized Geographical Code: 000 Benefiting Country Code: 000 Subcontract/Subgrant Plan Required: NO Performance Based Contract/Results Oriented Grant: NO Grants Under Contract / Contracts Under Grant: NO COTR/AOTR Assigned Date: Enter the date before the Award Date.

Section	User Action
	Has COTR/AOTR designation letter been assigned by all parties and delivered to the CTO and all other parties? — YES Has hard copy been placed in the OAA contract award file? — YES Award TEC — 10000 AIDAR/Agency Exemptions to Competition? — 0 Requisition Number (for mods only) — 0 Send notification to Requestor(s) of unused funds on the Requisition? — YES • Click the **Text** link on the left-hand menu.
Main / Text	**Field Name** / **Value** Description — Environmental Awareness Services Header Text — Environmental Awareness Services • Click the **Items** link on the left-hand menu.
Item #1 / General	• Click the Item number link **0001**. **Field Name** / **Value** Contract Item Number — 0001 Period of Performance — "Today's Date" to "3 Months Out" • Click the **Return** link on the left-hand menu. • Click the **Package** link on the left-hand menu.
Package / Cover Page	• Click the **Change Form** toolbar button and select the **OF347(4/2006)** form. • Click the **Main** link on the left-hand menu.
Main / General	• In production, you would now create the FPDS-NG record before routing the DO/TO to the CO for approval. • Click the **Validations** link on the left-hand menu.

Validations	• Correct all *Errors* generated by clicking the links next to each message. Fix the errors and click the **Validations** link again to verify.
	• Read all *Warning* messages and correct any that must be fixed.
	• Ignore *Warning* messages in training only:
	  o ACDI/VOCA does not have an active CCR registration
	  o A Milestone Plan must be linked and the baseline set in the Milestone Plan Option
	• When no errors appear, click the **Route History** link on the left-hand menu to continue.

Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button.

Section	User Action
	• Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Class Exercise #10: Creating a Delivery/Task Order (GSA)

Scenario:

You will need to create a task order against a GSA schedule contract for Defensive Driving training. The Requisition has already been created for $8,926.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Welcome Page</td><td>• Click the Create link on the Access Panel.</td></tr>
<tr><td>Document Create</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Document Type</td><td>Delivery / Task Order</td></tr>
<tr><td>External Contract</td><td>Check the box and enter “GV-343-VT” as the contract number.</td></tr>
<tr><td>Create From</td><td>Requisition</td></tr>
<tr><td>Delivery/Task Order Numbering Mask</td><td>Select the M/OAA numbering mask for a GSA Schedule Order.</td></tr>
<tr><td>Section Template</td><td>None</td></tr>
</table>
• Click the Continue button.
</td></tr>
<tr><td>Create Delivery / Task Order from Requisition</td><td>• Search for the Requisition Number provided by your instructor.
• Click the <u>Y</u> link in the Select Line Items column.
• At the bottom of your screen, click the Select All button to include the item from the Requisition.
• Click the Create button to continue.</td></tr>
<tr><td>Main / General</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Invoice Office</td><td>M/CFO</td></tr>
<tr><td>Vendor</td><td>JJACONSULT</td></tr>
<tr><td>Type of Warrant</td><td>Level 1</td></tr>
<tr><td>Contracting Officer</td><td>JCOAO</td></tr>
<tr><td>COTR/AOTR</td><td>JCOTR</td></tr>
<tr><td>Primary Product / Service Code</td><td>U001</td></tr>
<tr><td>Period of Performance</td><td>“Today’s Date” to “3 Months Out”</td></tr>
</table>
• Click the Additional Info link on the left-hand menu.
</td></tr>
<tr><td>Main / Additional Info</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>NAICS Code</td><td>611692</td></tr>
<tr><td>Performance-Based Service Acq</td><td>No – Service where PBA is not used</td></tr>
<tr><td>Cost Acctg Standards Clause</td><td>Yes – CAS clause included</td></tr>
<tr><td>Purchase Card Payment Method</td><td>No</td></tr>
<tr><td>Use of Recovered Material</td><td>No Clauses Included</td></tr>
<tr><td>Commercial Item Acq. Procedures</td><td>Commercial Item Procedures not used</td></tr>
<tr><td>CO's Determination of Bus. Size</td><td>Other Than Small Business</td></tr>
<tr><td>Payment Method</td><td>DIRECT</td></tr>
<tr><td>Place of Performance</td><td>000</td></tr>
<tr><td>Authorized Geographical Code</td><td>000</td></tr>
<tr><td>Benefiting Country Code</td><td>000</td></tr>
<tr><td>Subcontract/Subgrant Plan Required</td><td>NO</td></tr>
<tr><td>Performance Based Contract/Results Oriented Grant</td><td>NO</td></tr>
</table>
</td></tr>
</table>

Section	User Action
	Grants Under Contract / Contracts Under Grant: NO COTR/AOTR Assigned Date: Enter the date before the Award Date. Has COTR/AOTR designation letter been assigned by all parties and delivered to the CTO and all other parties?: YES Has hard copy been placed in the OAA contract award file: YES Award TEC: 8926 AIDAR/Agency Exemptions to Competition?: 0 Requisition Number (for mods only): 0 Send notification to Requestor(s) of unused funds on the Requisition?: YES • Click the **Text** link on the left-hand menu.
Main / Text	**Field Name** / **Value** Description: Defensive Driving Training Header Text: Defensive Driving Training • Click the **Items** link on the left-hand menu.
Item #1 / General	• Click the Item number link **0001**. **Field Name** / **Value** Period of Performance: "Today's Date" to "3 Months Out" • Click the **Return** link on the left-hand menu. • Click the **Package** link on the left-hand menu.
Package / Cover Page	• Click the **Change Form** toolbar button and select the **OF347(4/2006)** form. • Click the **Main** link on the left-hand menu.
Main / General	• In production, you would now create the FPDS-NG record before routing to the DO/TO to the CO for approval. • Click the **Validations** link on the left-hand menu.

Validations	• Correct all *Errors* generated by clicking the links next to each message. Fix the errors, and click the **Validations** link again to verify.
	• Read all *Warning* messages and correct any that must be fixed.
	• Ignore *Warning* messages in training only:
	  o JJA Consultants does not have an active CCR registration.
	  o A Milestone Plan must be linked and the baseline set in the Milestone Plan Option.
	• When no errors appear, click the **Route History** link on the left-hand menu to continue.

Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button.

Section	User Action
	• Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Exercise #11: Creating a Mission Purchase Card Order

Scenario:

You need to purchase office supplies and shipping through GSA Advantage with a government credit card. As a Purchase Card Holder, you can self-approve your purchase order.

This Purchase Order will have one line item when you are finished:

Line Item	Description	Total Estimated Cost	Total Obligated Amount
0001	Top Tab Legal Classification Folders	$158.40	$158.40
0002	Shipping	$20.00	$20.00
	Totals:	**$178.40**	**$178.40**

Section	User Action
Welcome Page	• Click **Create** on the Access Panel.
Document Create	**Document Type**: Purchase Order **Create From**: Requisition **Purchase Order Numbering Mask**: Select the appropriate Purchase Order numbering mask. **Section Template**: (None) • Click the **Continue** button.
Create Purchase Order from Requisition	• Enter the **Requisition Number** provided by your instructor. • Delete the **Site**. • Delete the **Buyer**. • Click the **Display** toolbar button. • Click the **Y** next to your Requisition. • Click the **Select All** button. • Click the **Create** button.
Main / General	**Field Name** / **Value** Invoice Office: Enter the office code where invoices should be sent. Vendor: GSOFSUPAPR Type of Warrant Required: Level 1 Contracting Officer: JCOAO COTR/AOTR: JCOTR Primary Product Service Code: 7510 Period of Performance: Enter a range of today's date to a date one month in the future. • Click the **Additional Info** link on the left-hand menu.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Main / Additional Info</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Reference Your Text</td><td>Quote 04/29/2009</td></tr>
<tr><td>NAICS Code</td><td>453210</td></tr>
<tr><td>Supplies or Services</td><td>Supplies</td></tr>
</table>
Click OK to update the line items from Blank to Supplies.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Performance-Based Service Acq</td><td>No – Service where PBA is not used</td></tr>
<tr><td>Cost Acctg Standards Clause</td><td>Not Applicable exempt from CAS</td></tr>
<tr><td>Purchase Card Payment Method</td><td>Yes</td></tr>
<tr><td>Use of Recovered Material</td><td>FAR 52.224-4 Included</td></tr>
<tr><td>Commercial Item Acq. Procedures</td><td>Commercial Item</td></tr>
<tr><td>CO's Determination of Bus. Size</td><td>Other Than Small Business</td></tr>
<tr><td>Payment Method</td><td>DIRECT</td></tr>
<tr><td>Place of Performance</td><td>Enter the relevant geographic code.</td></tr>
<tr><td>Authorized Geographical Code</td><td>000</td></tr>
<tr><td>Subcontract / Subgrant Plan Required</td><td>NO</td></tr>
<tr><td>Performance Based Contract/Results Oriented Grant</td><td>NO</td></tr>
<tr><td>Requisition Number (for mods only)</td><td>0</td></tr>
</table>
Click the Text link on the left-hand menu.
</td></tr>
<tr><td>Main / Text</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Description Text</td><td>Top Tab Legal Classification Folders (60 ct)</td></tr>
<tr><td>Header Text</td><td>Top Tab Legal Classification Folders (60 ct)</td></tr>
</table>
Click the Package link on the left-hand menu.
</td></tr>
<tr><td>Package / Cover Page</td><td>Click the Change Form toolbar button.
Click the OF-347 (4/2006) link.
Click the Validations link on the left-hand menu.</td></tr>
<tr><td>Validations</td><td>Correct any Errors generated by clicking the links to each message.
Click the Main link on the left-hand menu.</td></tr>
<tr><td>Main / General</td><td>Click the Self Approve toolbar button.
Click the Click here to continue Approving the document link.
Enter your Approval Password and click the Mark Approved button.
Click the Yes button.
Click the Click here to continue Releasing the document link.
Click Return to Home on the left-hand menu.</td></tr>
</table>

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GLAAS 102 Exercise #12: Creating an Associate Award

Scenario:

You need to issue an Associate Award to the Volunteers for Economic Growth Alliance (VEGA), the recipient of an existing Leader Award supporting economic growth. The two-year grant will be initially funded for $342,000 with an Award TEC of $1,250,000.

Section	User Action
Welcome Page	• Click the **Create** link on the Access Panel.
Document Create	**Field Name** / **Value** Document Type: Grant Create From: Requisition Grant Numbering Mask: Select the M/OAA Associate Award numbering mask. Section Template: (None) • Click the **Continue** button.
Create Grant from Requisition	• Enter the document number provided by your instructor in the **Requisition Number** field. • Delete "USAID/TRAINING" from the **Site** field. • Click the **Display** toolbar button. • Click the **Y** link under **Select Line Items**. • Click the **Select All** button on the lower portion of the screen. • Click the **Create** button.
Main / General	**Field Name** / **Value** Award Date: Enter a date 30 days from today. Type of Agreement: Grant Award Type: Cost Effective Date: Enter a date 35 days from today. Completion Date: 09/30/2011 Sponsoring Office: N/A Invoice Office: M/CFO Recipient: VOLECOGRAL Type of Warrant Required: Level 1 Agreements Officer: JCOAO Program Manager: JCOTR Period Of Performance: Enter the award effective date through the end of FY2011. • Click the **Additional Info** link on the left-hand menu.
Main / Additional Info	**Field Name** / **Value** CFDA Number: 98.001 Payment Method: DIRECT Environmental Determination Document Name: IEE Place of Performance: 000 Authorized Geographical Code: 000 Subcontract/Subgrant Plan Required: NO Performanced Based Contract/Results Oriented Grant: NO Grants under Contracts/Contracts under Grants: NO

Section	User Action
	COTR/AOTR Assigned Date: Enter the date before the Award Date. Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all others parties?: YES Has a hard copy been placed in the OAA contract award file?: YES Action Type: GR1 AIDAR Exemptions to Competition: 0 Leader Award Number: EEM-A-00-04-00002 Requisition Number (for mods only): 0 Send notification to Requestor(s) of unused funds on the Requisition?: YES • Click the **Text** link on the left-hand menu.
Main / Text	**Field Name** / **Value** Description Text: Associate Award for private market development, including agribusinesses and financial services. Header Text: Associate Award – Economic Growth • Click the **Items** link on the left-hand menu.
Items	• Click the Item number link **0001**.
Item / General #0001	**Field Name** / **Value** Description: Associate Award for economic growth programs. Qualifier: By Dollars Award Type: Cost Estimated Total Cost: 1250000 • Click the **Funding** link on the left-hand menu.
Item / Funding #0001	**Field Name** / **Value** Funding Type: Incrementally Funded Incrementally Funded Through Date: Enter the last day of this fiscal year. Ship To Value: 1250000 Incrementally Funded Amount: 342000 • Click the **Save** button. • Click the **Return** link on the left-hand menu.
Items	• Click the **Package** link on the left-hand menu.
Package	• Click the **Body** link on the left-hand menu.
Package / Body	• Click the **Load Template** toolbar button.
Template Selection	• Search for "Grant (US NGO)." • Click the **Display** button. • Click the **Grant (US NGO)** link under **Clause Template Name**. • Click the **Select All** button under **Section Selection**. • Click the **Continue** button.
Package / Body	• Click the **Cover Page** link under the **Section Title** column.

Section	User Action
Clause Summary	• Click **Yes** under the **Fill In** column next to **CP1 *AGRANTS/ENDOWMENTS**.
Clause Detail	**Field Name** / **Value** **Fillin 6 : [Dollar Value]** — $1,750,000 **Fillin 7: [Program]** — Associate Award for Economic Growth • Click the **Return** link on the left-hand menu.
Clause Summary	• Click the **Return** link on the left-hand menu.
Package / Body	• Click the **General** link under the **Section Title** column.
Clause Summary	• Check the box in the **Include** column for **AID/W ACTIONS**. • Click the **Yes** link under the **Fill in** column for **AID/W ACTIONS**.
Clause Detail	**Field Name** / **Value** **Fillin 1: [Appropriation]** — General Funds **Fillin 2: [Amount Obligated this Action]** — $476,000 **Fillin 3: [Total Estimated USAID Amount]** — $2,000,000 **Fillin 4: [Total Obligated USAID Amount]** — $476,000 **Fillin 5: [Cost-Sharing Amount]** — N/A **Fillin 17: [Payment Office]** — M/CFO/CMP • Click the **Return** link on the left-hand menu.
Clause Summary	• Click the **Return** link on the left-hand menu.
Package / Body	• Click the **Attachment A - Schedule** link in the **Section Title** column.
Clause Summary	• Check the box in the **Include** column next to **A.3B*AUS INCREMENTAL.** • Click the **Return** link on the left-hand menu.
Package / Body	• Click the **Generate** toolbar button. • Click the **Check Out** toolbar button. • Click the **Click here to Check out [Document Number]** link. • Save the document to your desktop.
Microsoft Word	• Open the document in Microsoft Word. • Locate **Attachment B – Program Description**. This is where you would cut and paste the Program Description. • Close and save the changes to the Word document and go back to your GLAAS window.
Check Out	• Click the **Click here to Return** link.
Package / Body	• Click the **Check In** toolbar button. • Click the **Skip Comments** button. • Click the **Browse** button to search for and locate the Word document. • Click the **Submit** button. • Click the **Main** link on the left-hand menu.
Main / General	• Click the **FAADS / PLUS** toolbar button.
FAADS	• Select the "2006" form version. • Click the **Submit** button. **Field Name** / **Value** 2. State Application Identifier — SAI Not Applicable 9. Recipient Zipcode — 20036 10. Type of Recipient — 12- Other NonProfit 11. Type of Action — A. New Assistance Action

Section	User Action
	24. Type of Assistance Transaction: 04 – Project Grant (B) 28. Principal Place of Performance Code/Project location: Foreign Country • Click the **Validate** button to check the FAADS document. Correct any errors. If no errors are found, click the **Return** link on the left-hand menu. • Click the **Submit** button.
Main / General	• Click the **Validations** link on the left-hand menu.
Validations	• Correct all *Errors* generated by clicking the links next to each message. Fix the errors, and click the **Validations** link again to verify. • Read all *Warning* messages and correct any that must be fixed. • Ignore *Warning* messages in training only: o A Milestone Plan must be linked and the baseline set in the Milestone Plan Option. • When no errors appear, click the **Route History** link on the left-hand menu to continue.
Route History	• Click the **Route** button to select **For Approval** and click the **Submit** button. • Click **New Route** and **Submit.** • Click the **Add** button and select the link for the **User ID** provided by your instructor. • Set the **Route Role** to "CO/AO" and the **Type** to "Approval." • Click the **Send** button. • Click the link for **Click here to continue Routing your document**. • Click the **Skip Comments** button. • Click the **Welcome Page** link to return to the Welcome Page. • The CO/AO will review the contract (from Inbox) and then **Approve** or **Disapprove** the document as appropriate.

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GLAAS 102 Exercise #13: Adding Incremental Funding to a Migrated Award

Scenario:

A cooperative agreement that was awarded to the National Democratic Institute for a civil society strengthening program was migrated into GLAAS. Now, you must modify the award to add $475,000 in incremental funding. The Award Total Estimated Cost (TEC) will remain $3,250,000.

Section	User Action
Welcome Page	• Click the **Open** link on the Access Panel.
Document Selection	• Change **Document Type** to "Requisition." • Change **Select From** to "All Requisitions." • Change **Requisition Type** to "Requisition for Modification." • Enter the Requisition for Modification number provided by your instructor in the **For** field. • Delete "USAID/TRAINING" from the **Site**. • Click the **Search** toolbar button. • When you find your Requisition for Modification number, click the **Y** link in the **View Line Items** Column to preview the line items. • Click the **Requisition Number** to select the requisition and proceed.
Main: General	• Click the **Text** link and review the Requisition for Modification.
Main: Text	• Click the **Proceed to Award** toolbar button to turn this Requisition for Modification into an Award modification.
Create New Modification	• Select **Grant Modification #** from the **Select Document Mask** dropdown list. • Click the **Create** button. • Click **Yes** to open the Modification.
Main: General	**Field Name** / **Value** Award Date: / Enter a date 30 days from today. Agreement Category: / Cooperative Agreement Effective Date: / Enter a date 35 days from today. Sponsoring Office / N/A Invoice Office / M/CFO Grants Specialist: / Enter your training ID. Type of Warrant Required / LEVEL 1 Agreements Officer / JCOAO Program Manager: / JCOTR • Click the **Additional Info** link on the left-hand menu.

Section	User Action
Main: Additional Info	

Field Name	Value
CFDA Number	98.001
Lower Section:	
Payment Method	DIRECT
Place of Performance	000
Authorized Geographical Code	000
Subcontract/Subgrant Plan Required	NO
Performanced Based Contract/Results Oriented Grant:	NO
Grants under Contracts/Contracts under Grants	NO
COTR/AOTR Assigned Date	Enter the date before the Award Date.
Has COTR/AOTR designation letter been signed by all parties and delivered to the assigned COTR/AOTR and all other parties?	YES
Has a hard copy been placed in the OAA contract award file?:	YES
Action Type	AA
Award TEC	3250000
AIDAR/Agency Exemptions to Competition	0
Competition (Yes/No)	YES
Earmark/Directive/Other	N/A
Leader Award Number	0
Requisition Number (for mods only)	Enter the Requisition Number provided by your instructor.
Send notification to Requestor(s) of unused funds on the Requisition?	YES

- Click the **Text** link on the left-hand menu.

Main: Text

Field Name	Value
Description	The purpose of this modification is to add incremental funding to the civil society strengthening program.
Header Text	Civil Society Strengthening Inc Funding Mod 1

- Click the **Items** link on the left-hand menu.

Items

- Click the Item number link **0001**.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Item 0001:
General</td><td>• Click the Modify toolbar button.
• Click the Additional Info link on the left-hand menu.</td></tr>
<tr><td>Item 0001:
Additional Info</td><td>• Click the Unfunded Line Item box.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>CLIN Estimated Amount</td><td>475000</td></tr>
</table>
• Click the Ship To/Acct link on the left-hand menu.</td></tr>
<tr><td>Item 0001 :
Delivery Location/ Accounting Detail</td><td>• Click the lower Add button.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Ship To</td><td>000</td></tr>
</table>
• Click the Add button next to Accounting.</td></tr>
<tr><td>Item 0001 :
Accounting Information</td><td>• Use the lookup button next to Requisition Number at the bottom of the page to search for and select the Requisition number provided by your instructor.
  • Select the ALL radio button to search for the Requisition.
  • Click on the Line Item Number for the Requisition at the bottom of the page.
• Click the Refresh button.
• Click OK to confirm the Refresh.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Payment Office</td><td>M/CFO</td></tr>
</table>
• Click the Submit button.</td></tr>
<tr><td>Item 0001:
Delivery Location/ Accounting Detail</td><td>• Click the Submit button.</td></tr>
<tr><td>Item 0001:
Ship To/ Acct</td><td>• Click the Funding link on the left-hand menu.</td></tr>
<tr><td>Item 0001:
Funding</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Funding Type</td><td>Incrementally Funded</td></tr>
<tr><td>Incrementally Funded Through Date</td><td>09/30/2010</td></tr>
<tr><td>Incrementally Funded Amount</td><td>475000</td></tr>
</table>
• Click the Save button.
• Click the Return link on the left-hand menu.
• Click the Main link on the left-hand menu.</td></tr>
<tr><td>Main:
General</td><td>• Click the FAADS button on the toolbar.
• Click the Yes button even though a FAADS record does not exist for the base version of the award.</td></tr>
</table>

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>FAADS</td><td>
Select the “2006” form version.
Click the Submit button.
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>2. State Application Identifier</td><td>SAI Not Applicable</td></tr>
<tr><td>9. Recipient Zipcode</td><td>20036</td></tr>
<tr><td>10. Type of Recipient</td><td>12- Other Non-Profit</td></tr>
<tr><td>11. Type of Action</td><td>B. Continuation</td></tr>
<tr><td>24. Type of Assistance Required</td><td>05 – Cooperative Agreement (B)</td></tr>
<tr><td>28. Principal Place of Performance Code/Project location</td><td>Foreign Country</td></tr>
</table>
Click the Validate button to check the FAADS document. Correct any errors when no errors are found click Return.
Click the Submit button.
</td></tr>
<tr><td>Main:
General</td><td>Click the Validations link on the left-hand menu.</td></tr>
<tr><td>Validations</td><td>
Correct all Errors generated by clicking the links next to each message. Fix the errors, and click the Validations link again to verify.
Read all Warning messages and correct any that must be fixed.
Ignore Warning messages in training only:
A Milestone Plan must be linked and the baseline set in the Milestone Plan Option.
When no errors appear, click the Route History link on the left-hand menu to continue.
</td></tr>
<tr><td>Route History</td><td>
Click the Route button to select For Approval and click the Submit button.
Click New Route and Submit.
Click the Add button and select the link for the User ID provided by your instructor.
Set the Route Role to “CO/AO” and the Type to “Approval.”
Click the Send button.
Click the link for Click here to continue Routing your document.
Click the Skip Comments button.
Click the Welcome Page link to return to the Welcome Page.
The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.
</td></tr>
</table>

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GLAAS 102 Exercise #14: Modifying an Award to Add Funding from a Requisition Group

Scenario:

You need to modify an existing, fully-funded Purchase Order to add additional funding drawn from a Requisition Group. $2,700 was previously obligated; you will now obligate an additional $2,700 by pulling in the new accounting information from the lead requisition, and new accounting lines from requisitions in the requisition group. The Award TEC will increase by $2,700 to a new total of $5,400.

Line Item	Description	Total Estimated Cost	Amount Obligated This Action	Total Obligated Amount
0001	Blackberry PDA	$5,400	$2,700	$5,400

Section	User Action
Welcome Page	• Click the **Open** link on the Access Panel.
Document Selection	• Change **Document Type** to "Requisition." • Change **Select From** to "All Requisitions." • Change **Requisition Type** to "Requisition for Modification." • Enter the Requisition for Modification number provided by your instructor in the **For** field. • Delete "USAID/TRAINING" from the **Site**. • Click the **Search** toolbar button. • When you find your Requisition for Modification number, click the **Y** link in the **View Line Items** Column to preview the line items. • Click the **Requisition Number** to select the requisition and proceed.
Main: General	• Click the **Text** link on the left-hand menu and review the Requisition for Modification.
Main: Text	• Click the **Proceed to Award** toolbar button to turn this Requisition for Modification into an Award modification.
Create New Modification	• Select **Contract Modification #** from the **Select Document Mask** dropdown list. • Select the **Reason for Modification.** • Click the **Create** button. • Click **Yes** to open the Modification.
Main: General	**Field Name** / **Value** Award Date: / Enter a date two weeks from today. Effective Date: / Enter a date three weeks from today. Invoice Office / M/CFO Type of Warrant Required / Level 1 • Click the **Additional Info** link on the left-hand menu.

Section	User Action
Main: Additional Info	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Payment method</td><td>DIRECT</td></tr><tr><td>Place of Performance</td><td>Enter the relevant geographic code.</td></tr><tr><td>Benefitting Country Code</td><td>000</td></tr><tr><td>Subcontract/Subgrant Plan Required</td><td>NO</td></tr><tr><td>Performanced Based Contract/Results Oriented Grant</td><td>NO</td></tr><tr><td>Action Type</td><td>PM</td></tr><tr><td>Award TEC</td><td>5400</td></tr><tr><td>Requisition Number (for mods only) is required</td><td>0</td></tr></table>• Click the **Items** link on the left-hand menu.
Items	• Click the Item number link **0001**.
Item 0001: General	<table><tr><th>Field Name</th><th>Value</th></tr><tr><td>Quantity</td><td>18</td></tr></table>• Click the **Funding** link on the left-hand menu.
Item 0001: Funding	• Click the **Add from Group** button.
Selection Page:	• Select the **View All** radio button. • Click the **Continue** button.
Confirmation	• Select the **Accounting Lines** from the requisitions in the Req Group that are not already on the award. • Click the **Add to Award** button. • Scroll down and click the **Save** button.
Item 0001: Funding	• Click the **Summary** link on the left-hand menu.
Item 0001: Summary	• Verify that the quantity equals the total quantity on all accounting lines. • Click the **Return** link on the left-hand menu.
Items	• Click the **Package** link on the left-hand menu.
Package: Cover Page	• Click the **Change Form** toolbar button to select a cover page.
Form Selection	• Click the **SF-30** link.
Package: Cover Page	• Click the **Edit** toolbar button.
SF-30 Modification of Contract	• Type "Fully Funded" in the field below **13. D Other (Specify type of modification and authority).** • Click the **Submit** button.

<table>
<tr><th>Section</th><th>User Action</th></tr>
<tr><td>Package:
Cover Page</td><td>• Click the Main link on the left-hand menu.</td></tr>
<tr><td>Main:
General</td><td>• Click the Text link on the left-hand menu.</td></tr>
<tr><td>Main:
Text</td><td>
<table>
<tr><th>Field Name</th><th>Value</th></tr>
<tr><td>Description Text</td><td>The purpose of this modification is to add funding to purchase additional Blackberrys.</td></tr>
<tr><td>Header Text</td><td>The purpose of this modification is to add funding to purchase additional Blackberrys.</td></tr>
</table>
• Click the Validations link on the left-hand menu.
</td></tr>
<tr><td>Validations</td><td>• Correct all Errors generated by clicking the links next to each message. Fix the errors, and click the Validations link again to verify.
• Read all Warning messages and correct any that must be fixed.
• Ignore Warning messages in training only:
  o BELL ATLANTIC MOBILE does not have an active CCR registration.
• When no errors appear, click the Route History link on the left-hand menu to continue.</td></tr>
<tr><td>Route History</td><td>• Click the Route button to select For Approval and click the Submit button.
• Click New Route and Submit.
• Click the Add button and select the link for the User ID provided by your instructor.
• Set the Route Role to “CO/AO” and the Type to “Approval.”
• Click the Send button.
• Click the link for Click here to continue Routing your document.
• Click the Skip Comments button.
• Click the Welcome Page link to return to the Welcome Page.
• The CO/AO will review the contract (from Inbox) and then Approve or Disapprove the document as appropriate.</td></tr>
</table>