

OBLIGATING AGREEMENTS IN PROCUREMENT DESKTOP

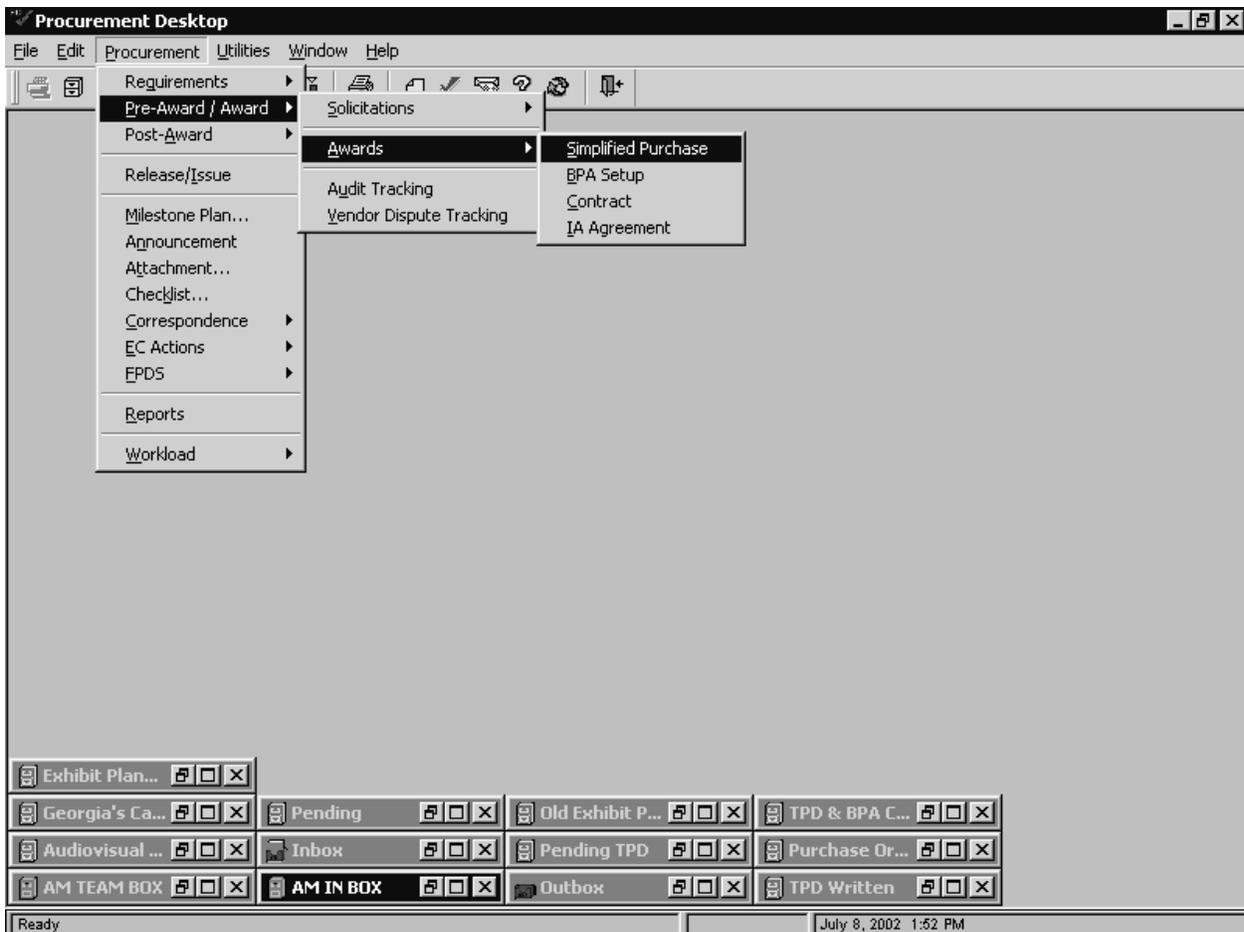
This appendix prescribes step-by-step instructions for obligating and awarding cooperative agreements, task agreements, and interagency acquisition agreements in Procurement Desktop (PD). Procurement Desktop is the Department of the Interior Electronic Acquisition System (IDEAS) software.

COOPERATIVE AGREEMENTS:

Cooperative Agreements may be “stand-alone” agreements or they may be larger agreements with tasks issued under the basic terms and conditions. Instructions for creating a stand-alone agreement and for creating the larger agreement with tasks under it are set forth below.

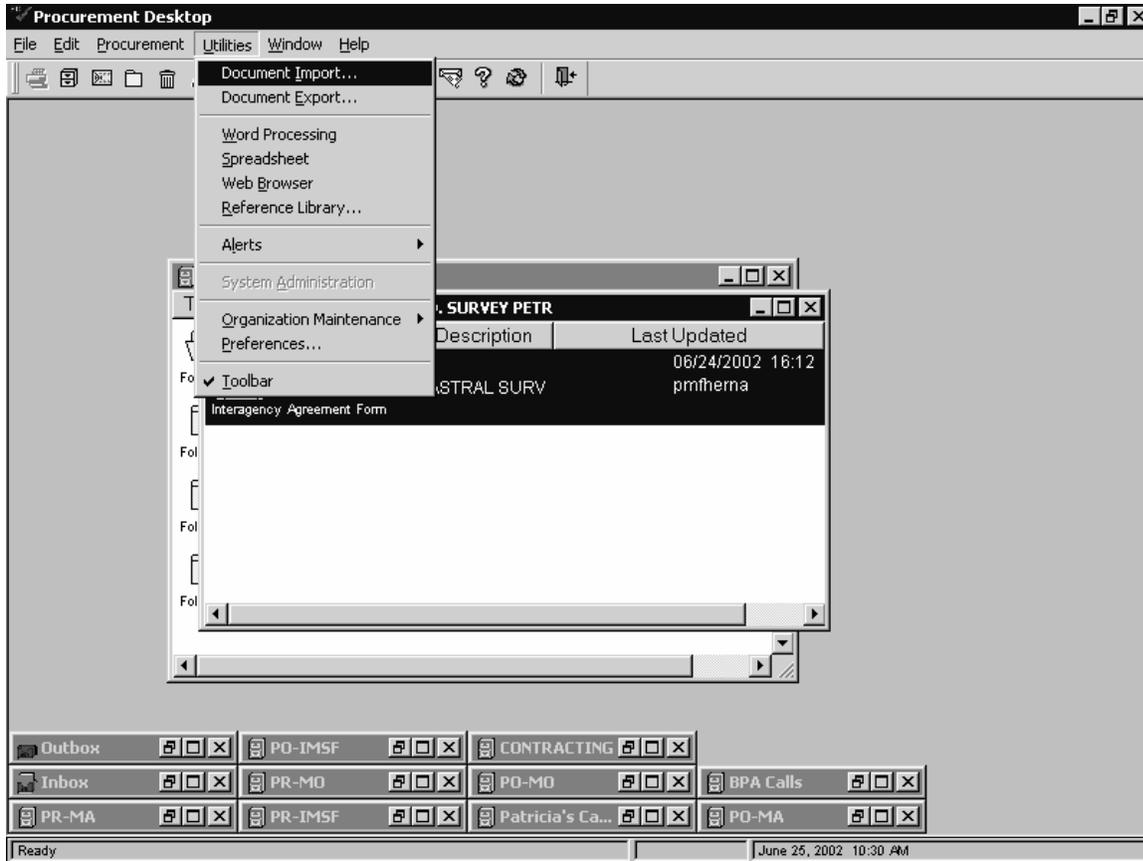
1. Stand-alone Agreement:

Create an Optional Form 347 by choosing “Procurement,” “Pre-Award/Award,” “Awards,” and then “Simplified Purchase.”



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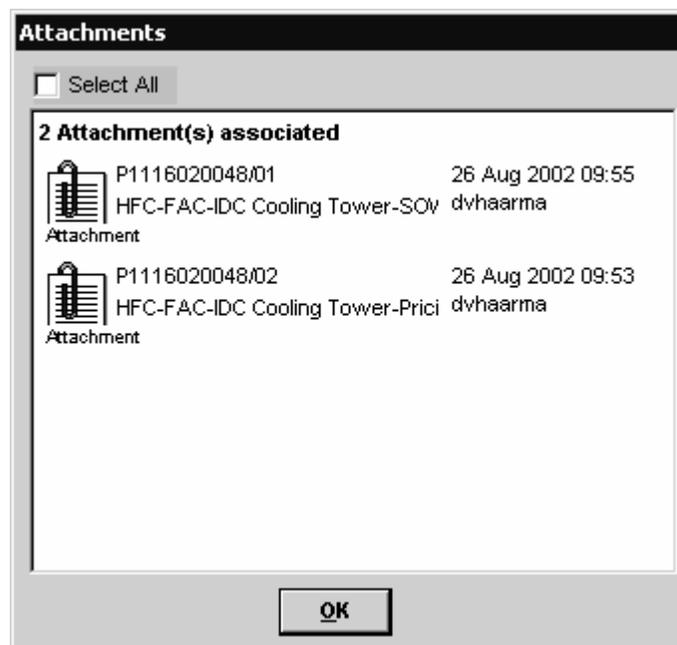
5. Attach a copy of the cooperative agreement to the OF-347. Go to “Utilities” and select “Document Import.” The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.



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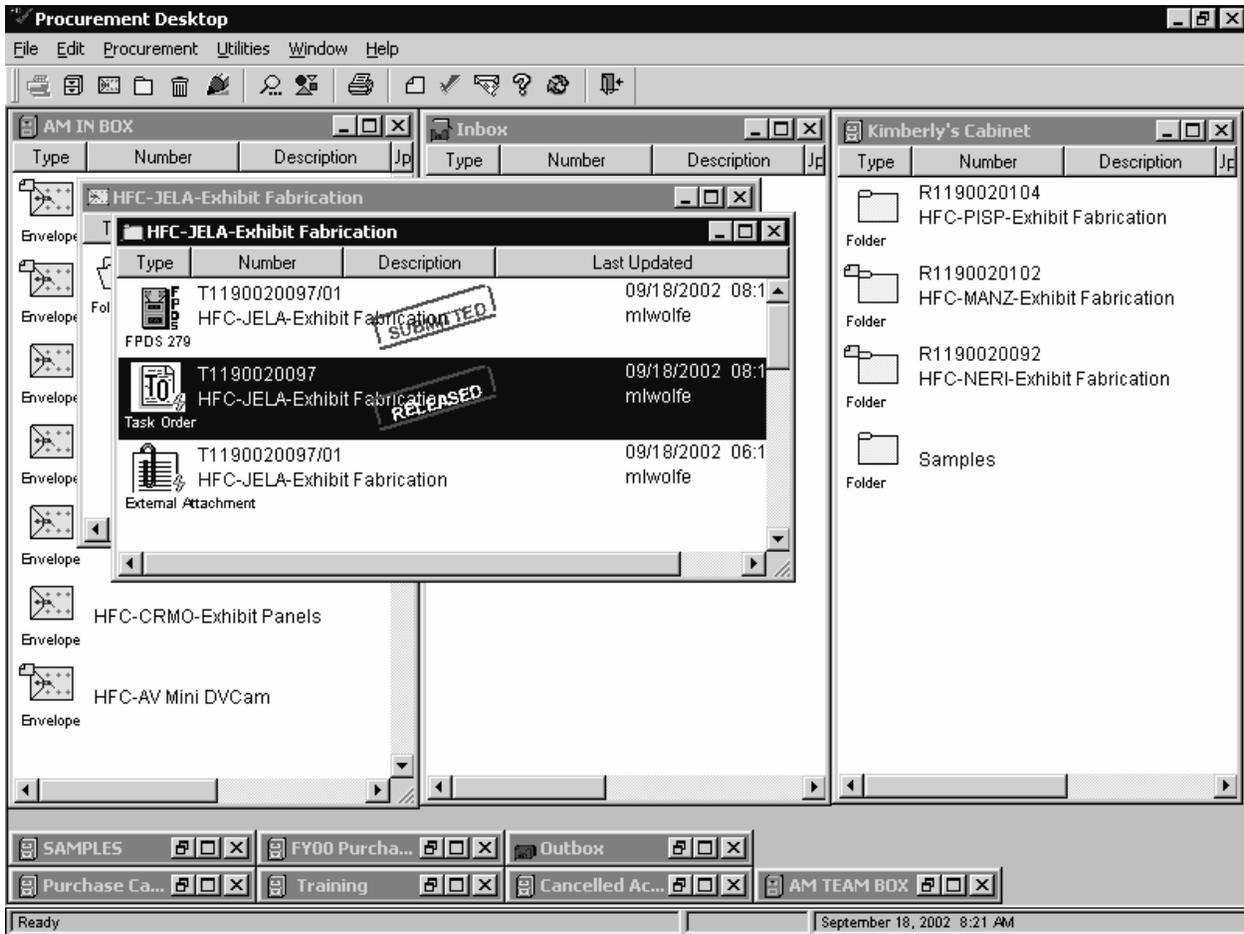
6. Validate your document for Electronic Commerce transmission by choosing “Procurement,” “EC Actions,” and then “EC Validate.”
7. Once the document has passed EC Validation, electronically submit by choosing “Procurement,” “EC Actions,” and then “EC Submit.”

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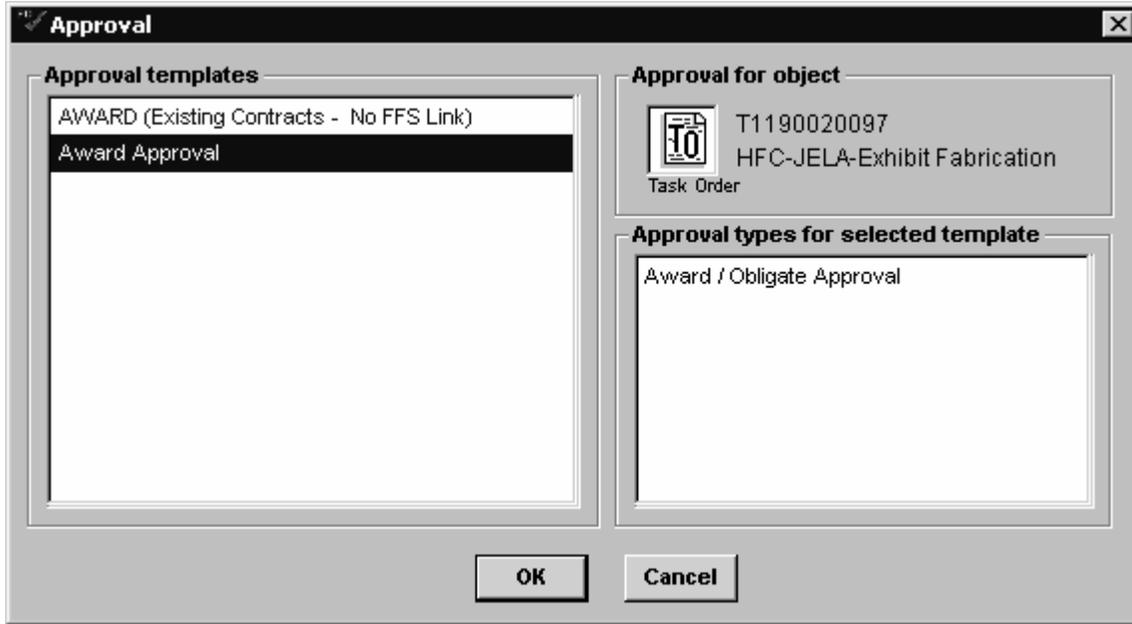
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- Once you click okay, you document(s) will be issued and electronically awarded. A yellow lightning bolt will appear beside the document(s) that were submitted.

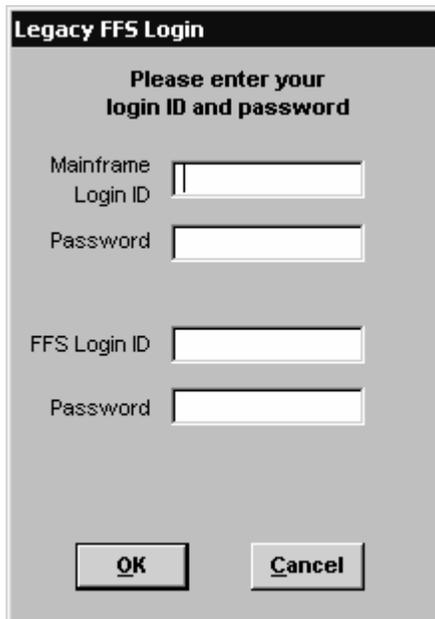


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9. Approve using the “Award Approval” option.



You will be prompted for your USGS and FFS Logins in order to make the award. When the award is going through you will then be prompted for your SEC1 Code (this is the acronym for your Region/Park).

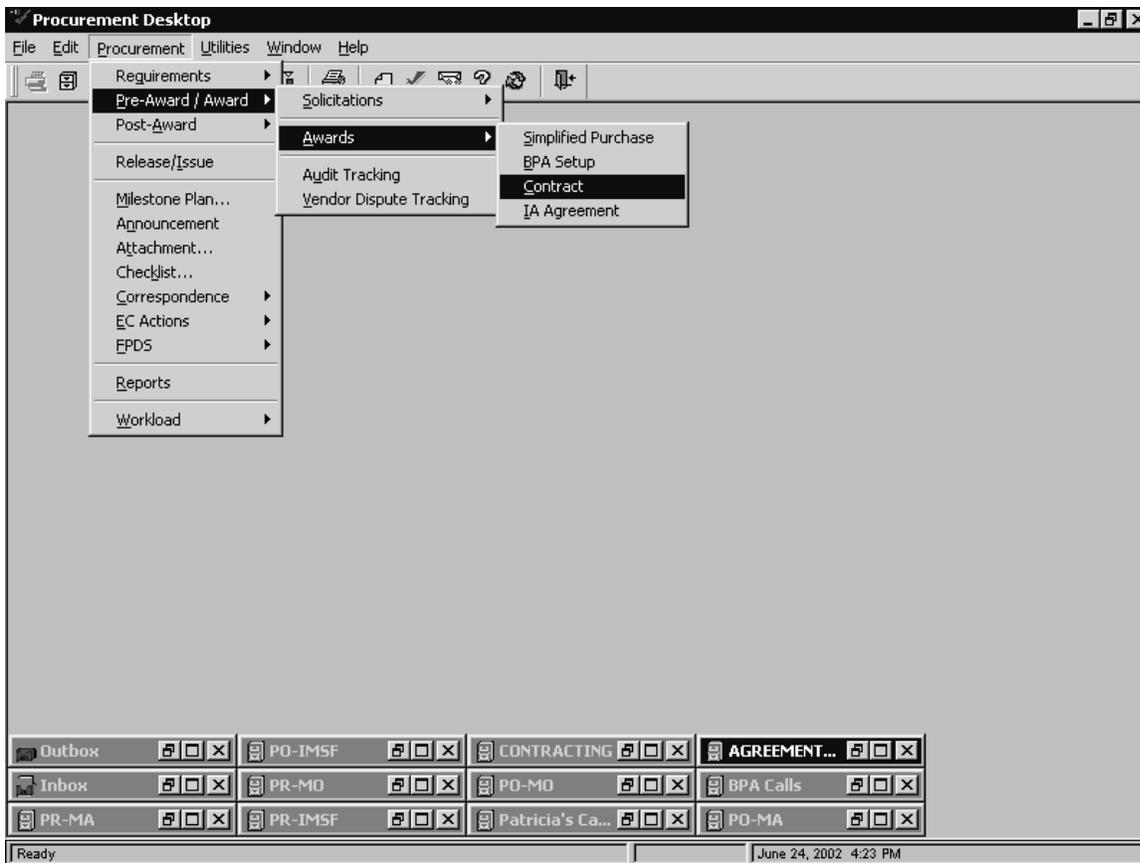


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COOPERATIVE AGREEMENTS WITH TASK AGREEMENTS:

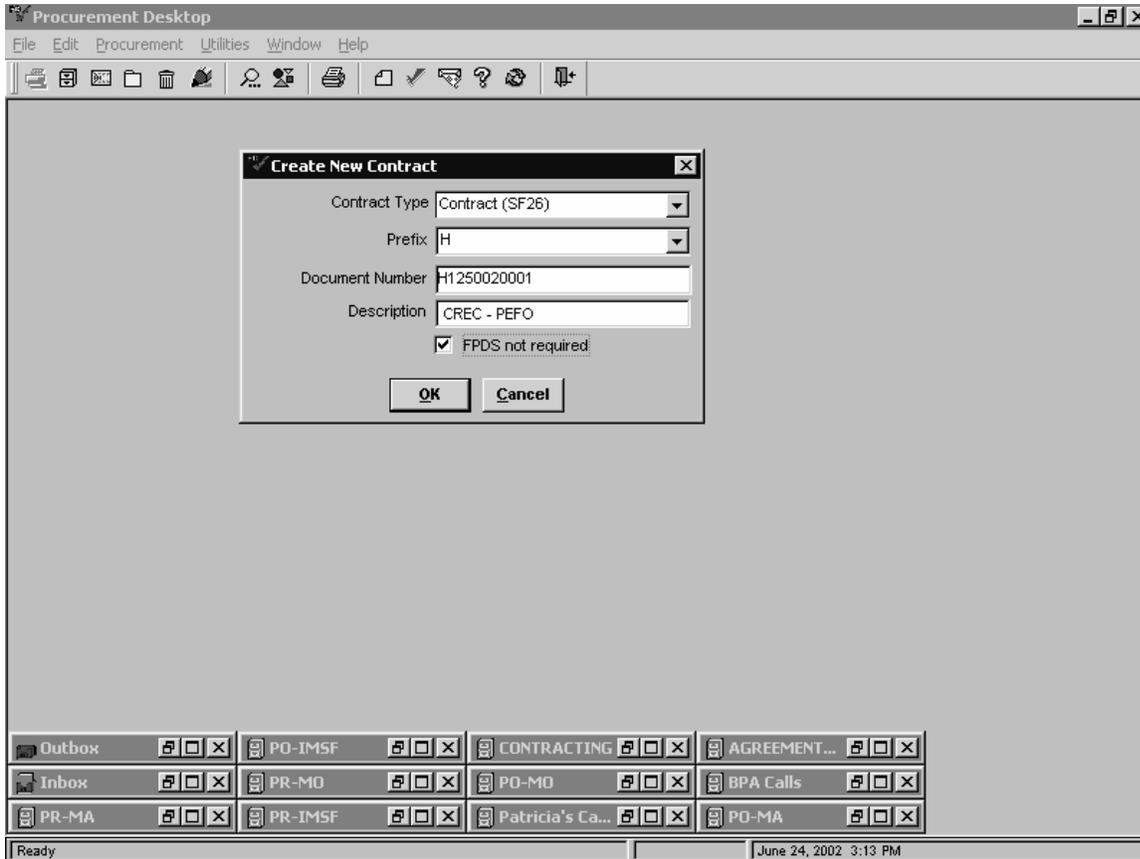
USE THESE INSTRUCTIONS WHEN YOU ARE ISSUING TASK AGREEMENTS TO OBLIGATE FUNDS.

1. Create a Standard Form 26, Contract, by choosing “Procurement,” “Pre-Award/Award,” “Awards,” “Contract.”



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- | | <u>Org Code</u> | <u>FY</u> | <u>Sequential Number</u> |
|---|---|-------------------|---|
| 2. Cooperative agreements are numbered as follows: H | { <u>1</u> <u>2</u> <u>5</u> <u>3</u> } | <u>0</u> <u>6</u> | { <u>0</u> <u>0</u> <u>0</u> <u>1</u> } |
| Numbering of the OF-347 is the same. | | | |
| 3. Choose the option “FPDS NOT REQUIRED.” | | | |



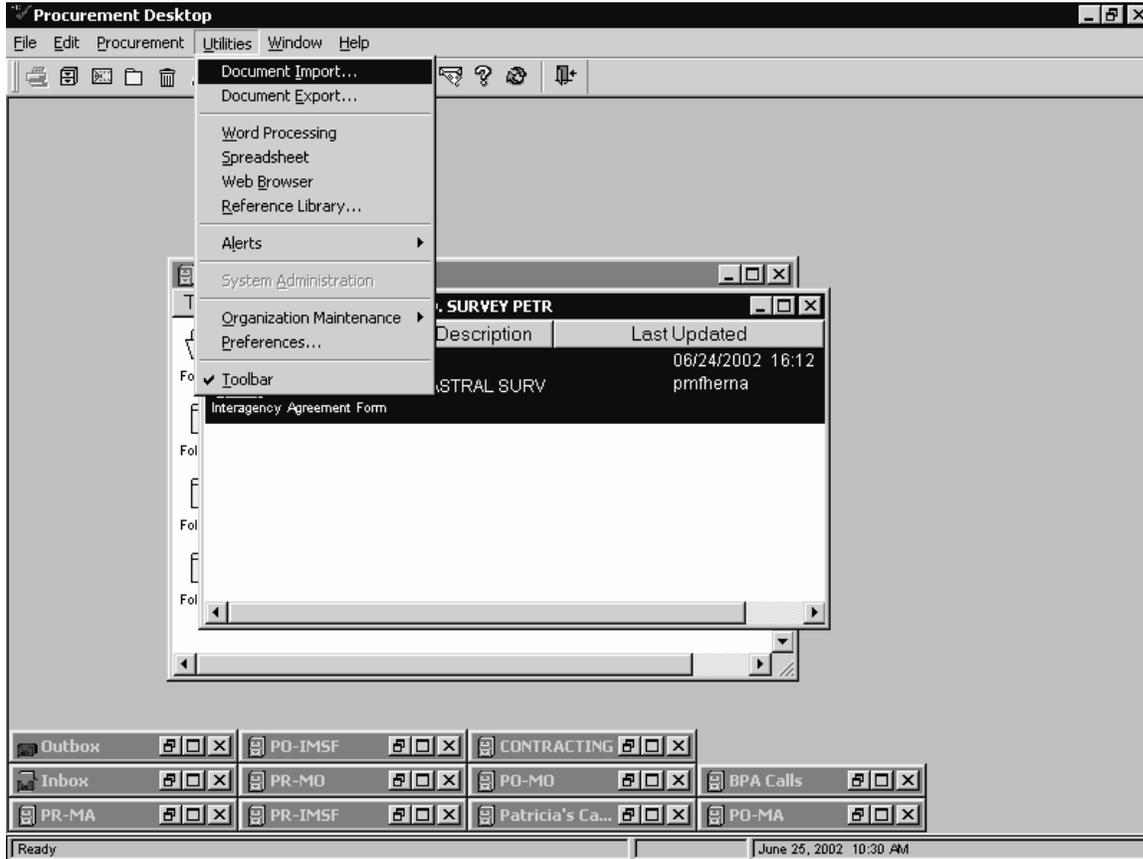
4. You should complete the entire document. This document will be used as a document to create and obligate task agreements against the cooperative agreement. On the SF-26 the items required to be completed are:

- Item 2, “Contract Number.”
- Item 5, “Issued By.”
- Item 7, “Name and Address of Contractor.”
- Item 12, “Payment will be made by.”

Line Item Description: In this block you can type in a statement such as “Informational document for Cooperative Agreement Number H _____. See attached cooperative agreement for more information.”

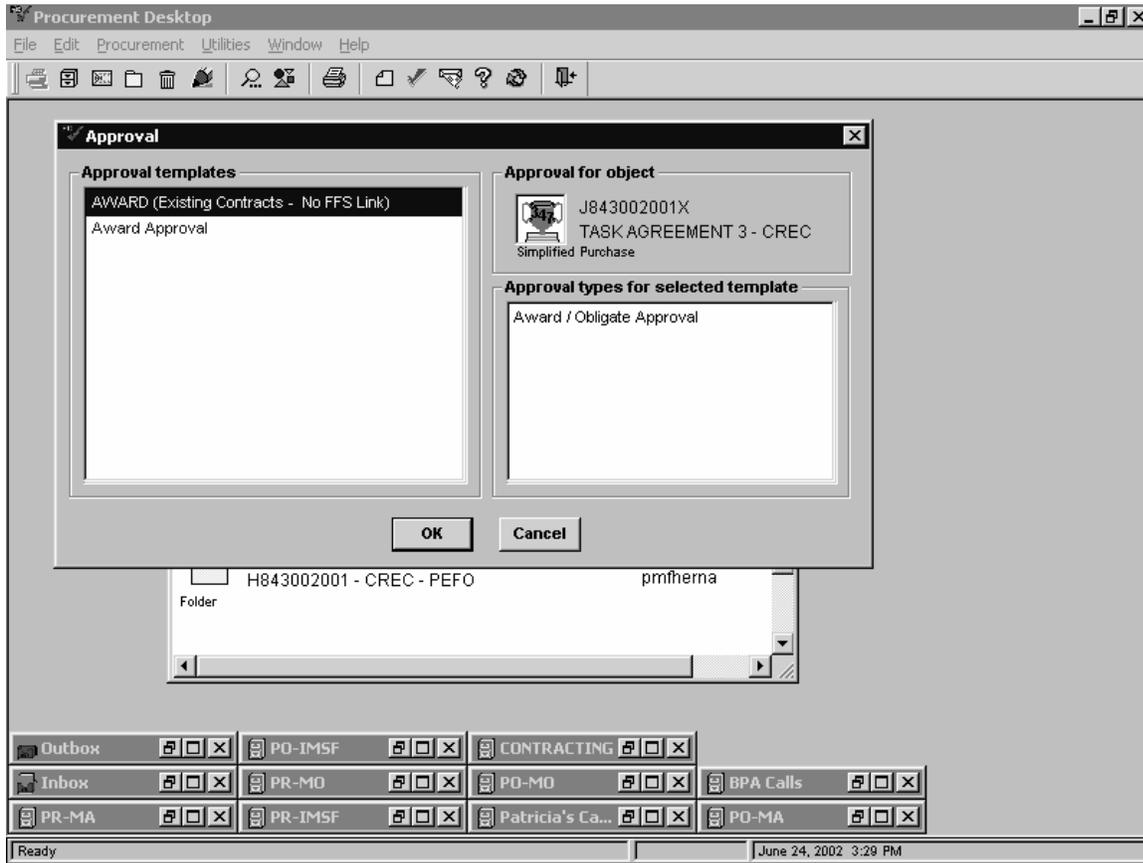
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5. Attach a copy of the cooperative agreement to the SF-26. Go to “Utilities” and select “Document Import.” The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.



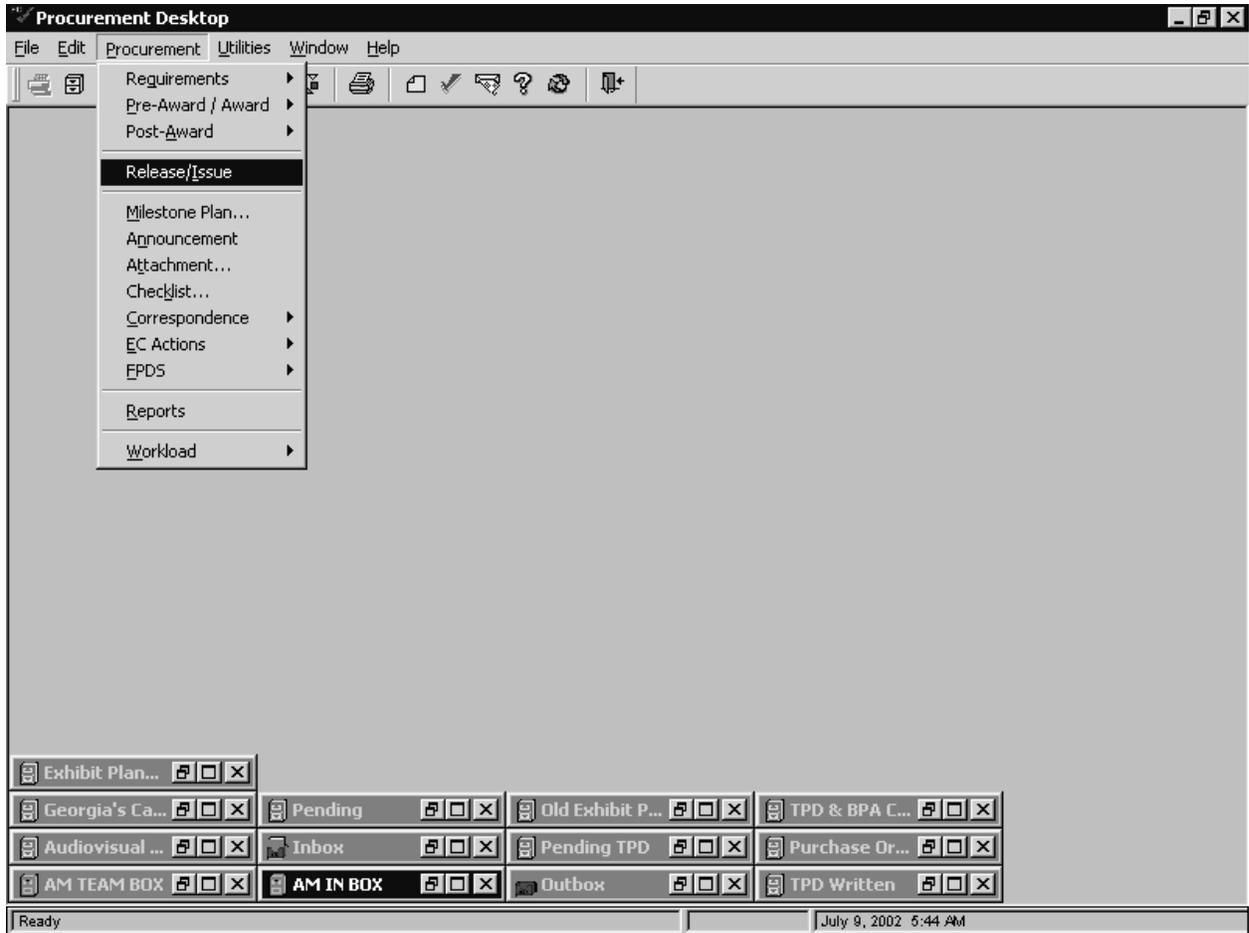
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6. Approve the document using “AWARD (Existing Contracts – No FFS Link).”



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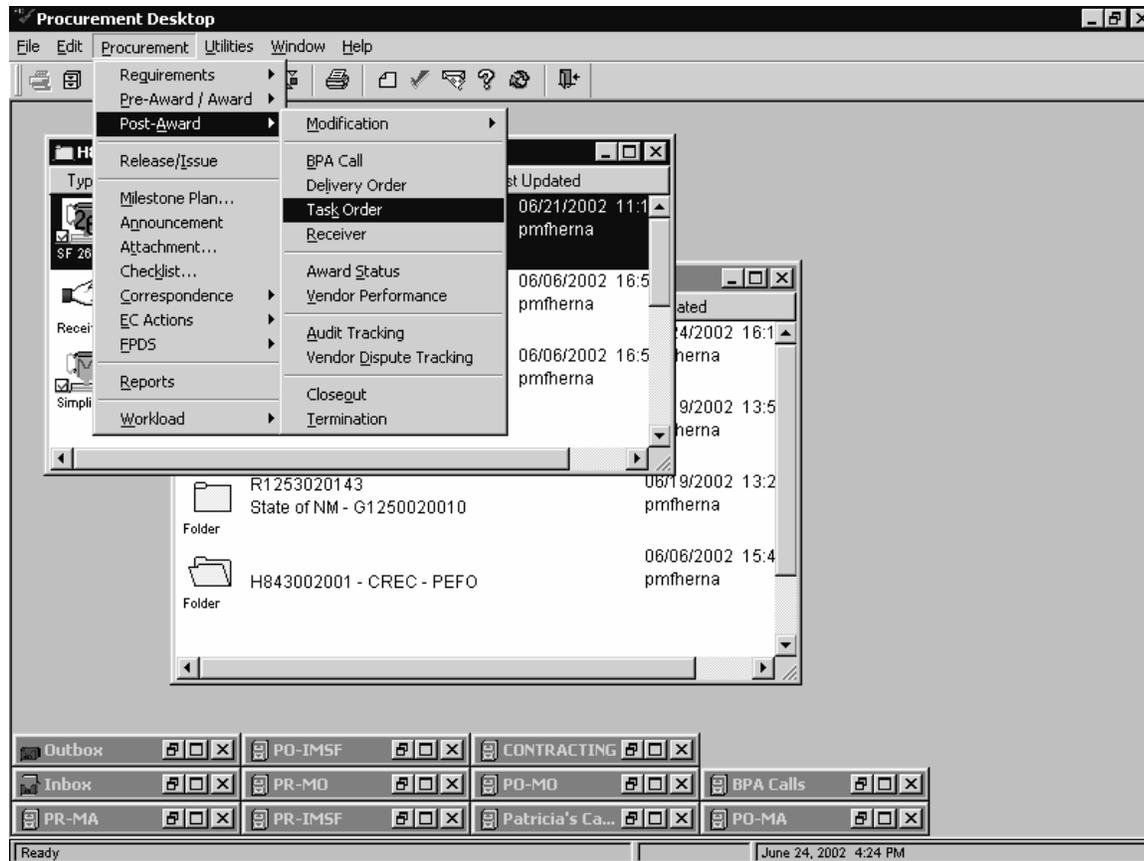
7. Release the document by choosing “Procurement” and then “Release/Issue.”



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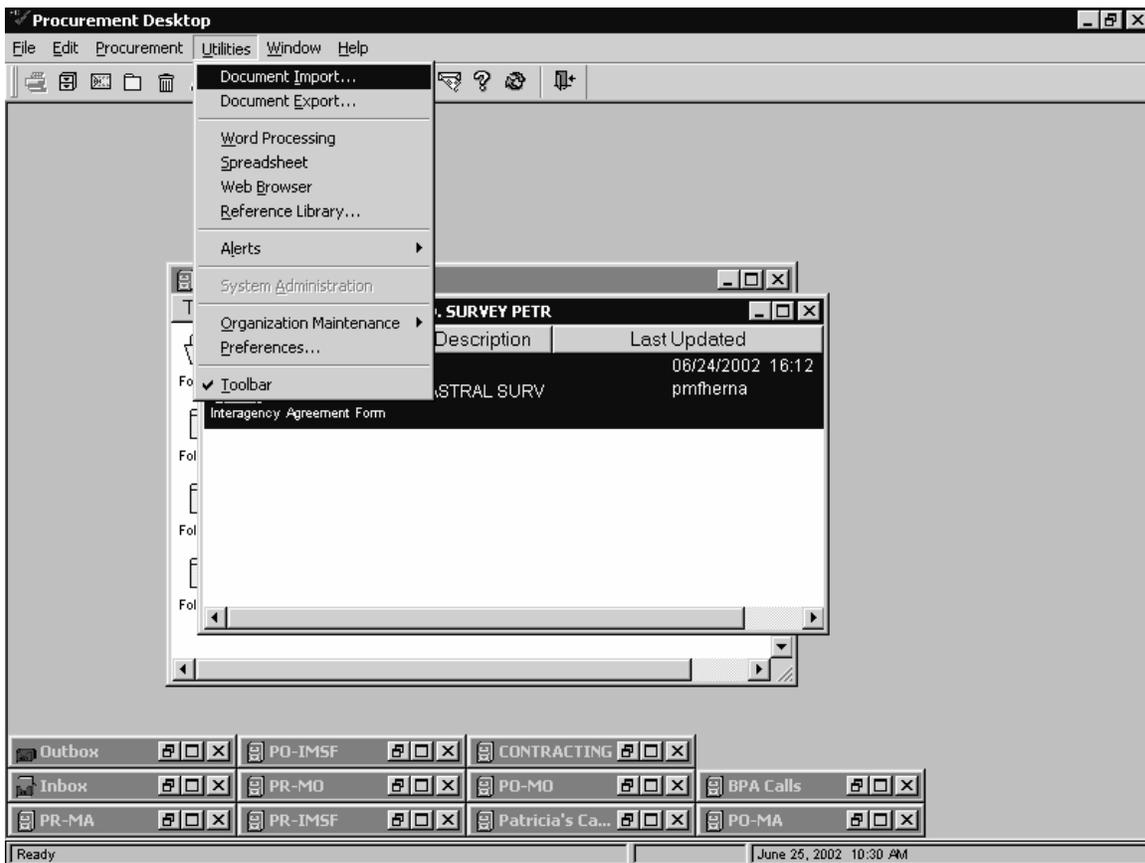
TO CREATE A TASK AGREEMENT AFTER CREATING THE SF-26:

1. Highlight the SF-26, Contract, you created for the cooperative agreement. Choose “Procurement,” “Post-Award,” and “Task Order.”



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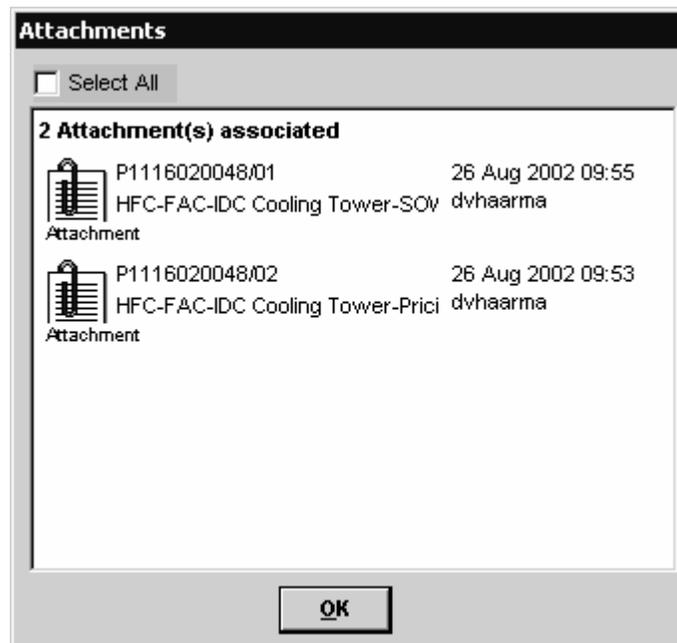
5. Attach a copy of the cooperative agreement to the OF-347. Go to “Utilities” and select “Document Import.” The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.



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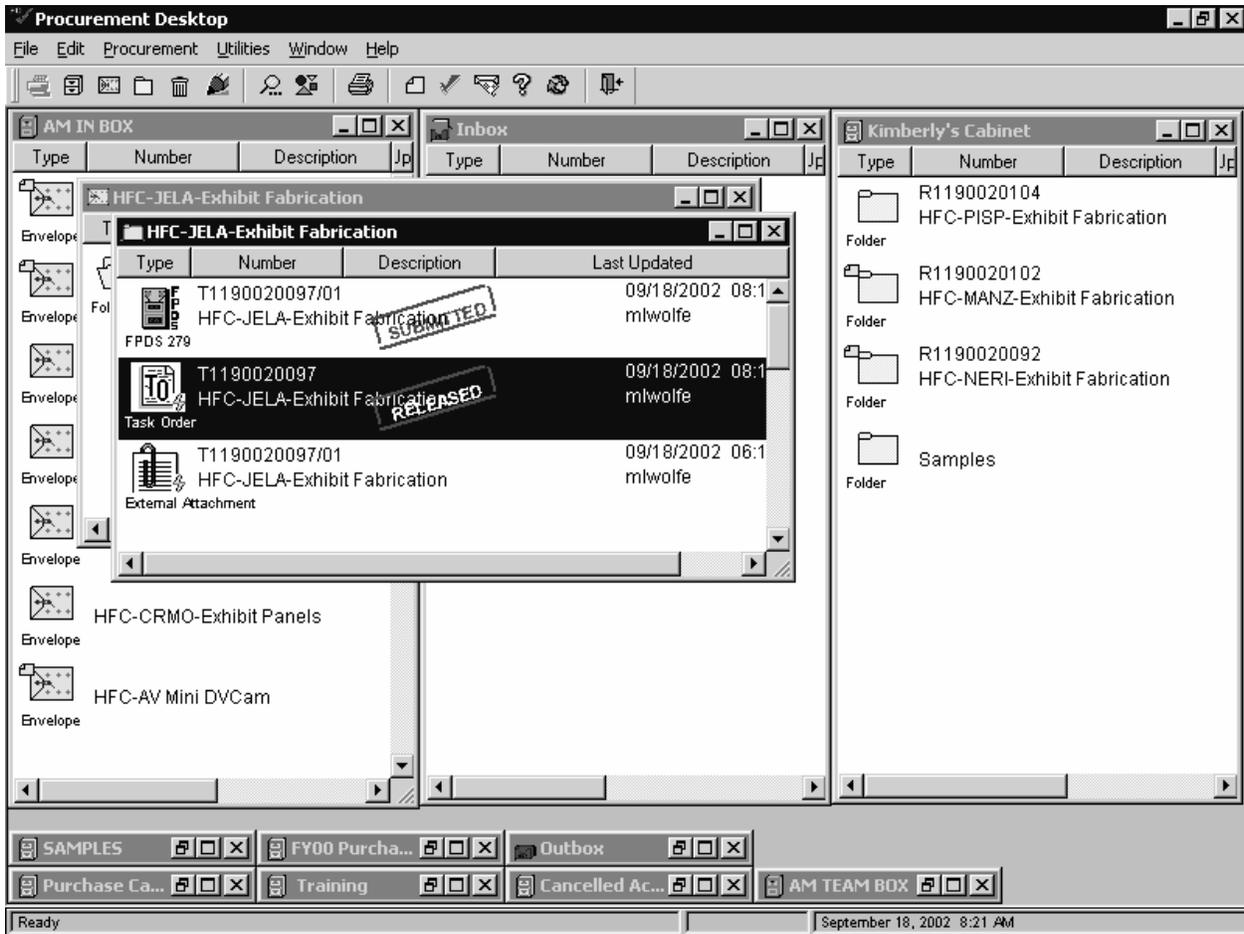
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7. Once the document has passed EC Validation, electronically submit by choosing “Procurement,” “EC Actions,” and then “EC Submit.”

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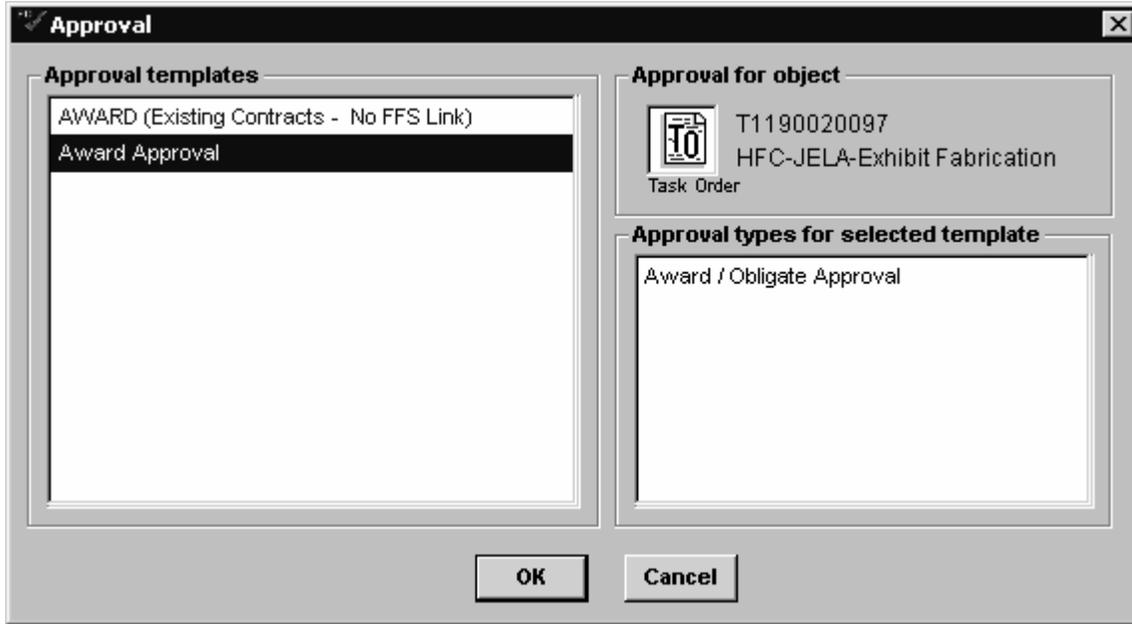
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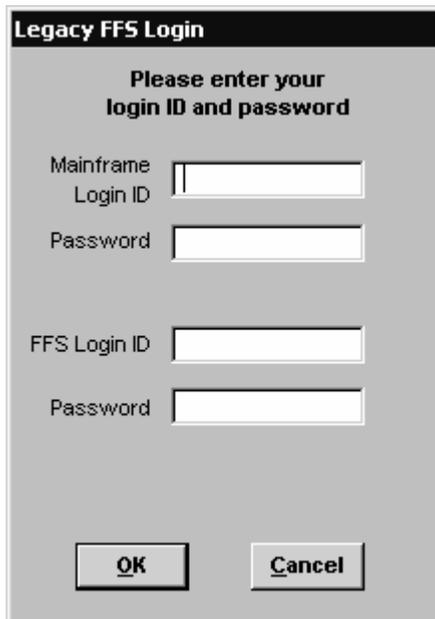


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9. Approve using the “Award Approval” option.



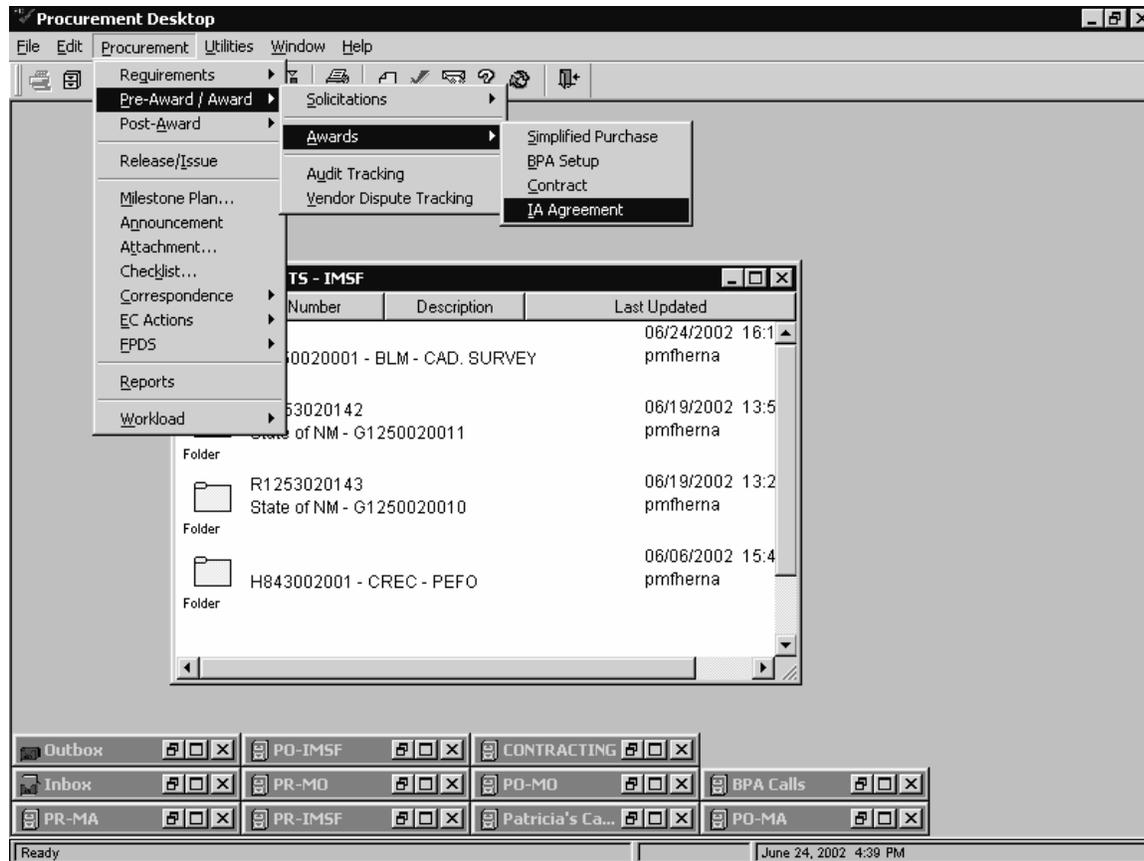
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INTERAGENCY ACQUISITION AGREEMENTS:

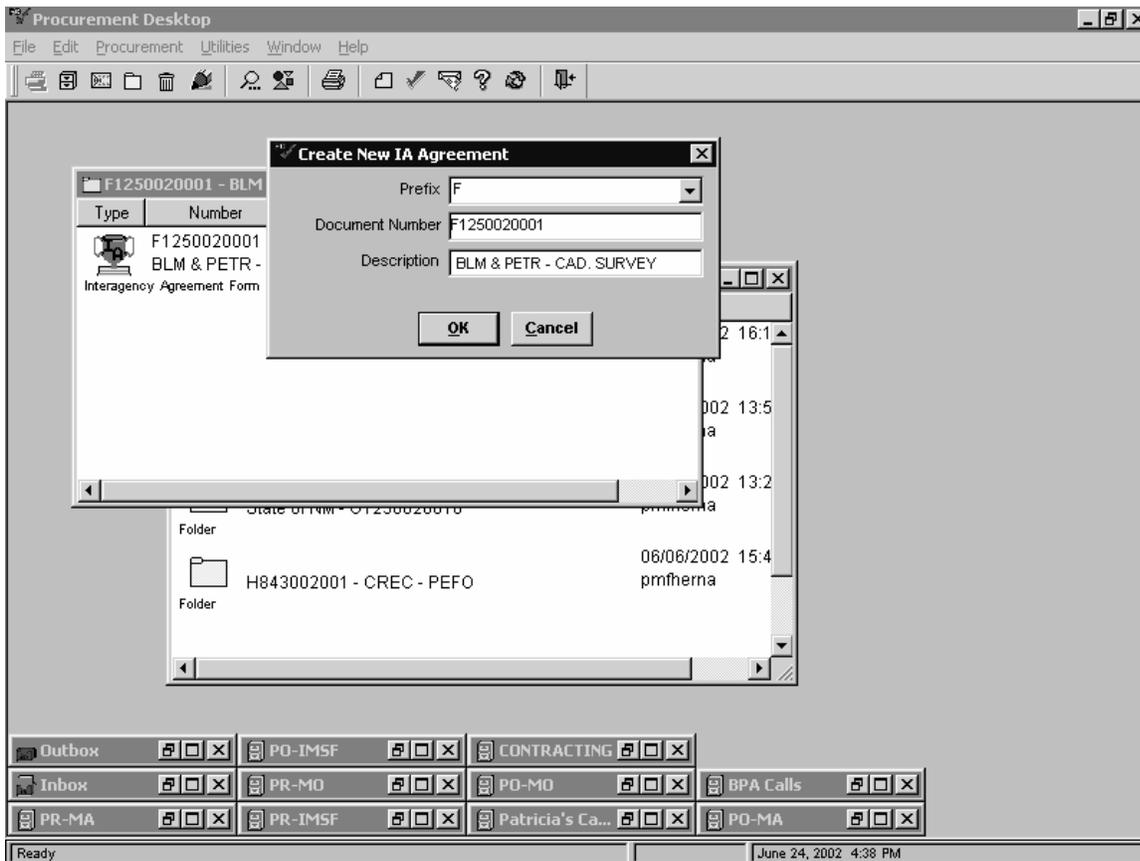
1. Create an interagency acquisition agreement by choosing “Procurement,” “Pre-Award/Award,” “Awards,” and the “IA Agreement.”



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2. Interagency acquisition agreements are numbered as follows:

	Org Code	FY	Sequential Number
F	{1 2 5 3}	0 6	{0 0 0 1}



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Procurement Desktop [Window Controls]

File Edit Lines Window Help

[Icons]

BLM & PETR - CADASTRAL SURV [Window Controls]

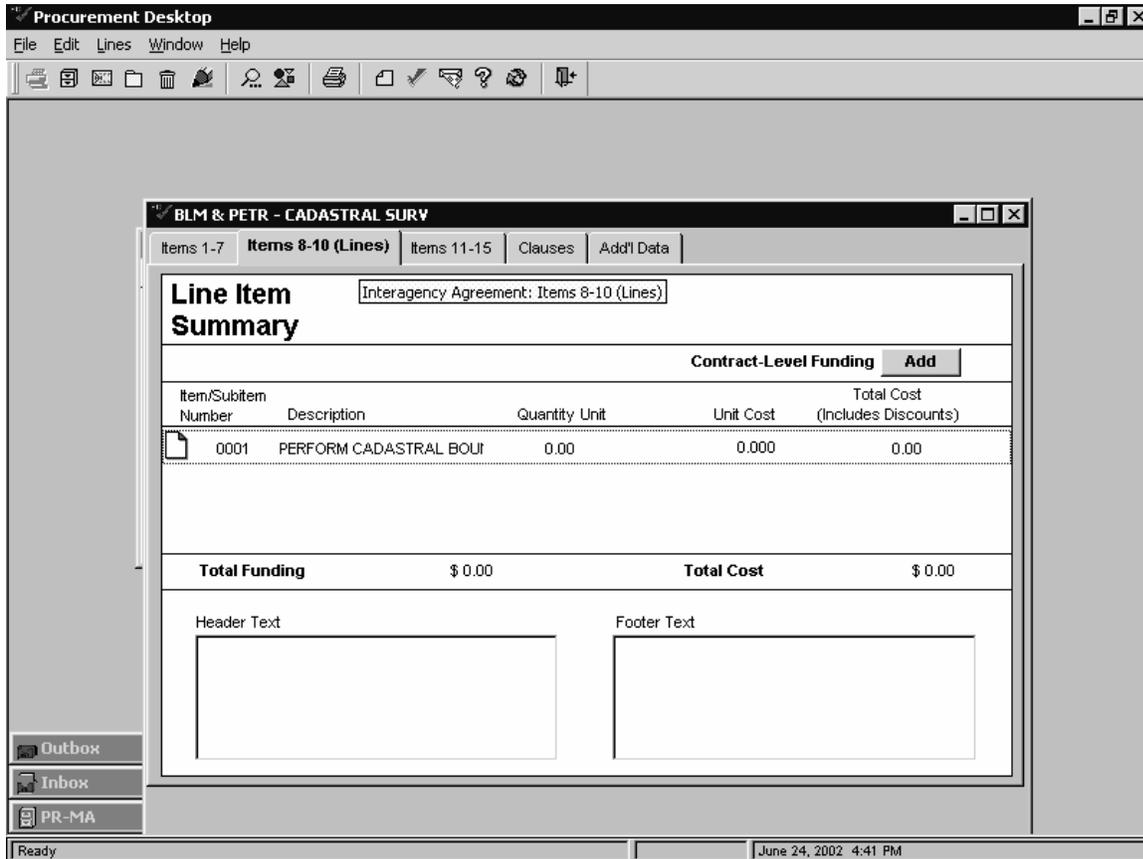
Items 1-7 | Items 8-10 (Lines) | Items 11-15 | Clauses | Add'l Data

INTER/INTRA-AGENCY AGREEMENT		1. PAGE 1 of <input type="text" value="1"/>	2. REQUISITION NO.
3. DATE PREPARED 06/24/2002	4. AGREEMENT NO. F1250020001	5a. MODIFICATION NO.	5b. TASK ORDER NO.
6. TO: (Agency, name, telephone number of performing agency) () -		7. FROM: (Agency, name, telephone number of originator) IMSF - ACG - Contracting, Cooperative Agreements 1100 Old Santa Fe Trail Santa Fe, NM 87504-0728 (505) 988-6085	
Attn: <input type="text"/>		<input type="button" value="Add"/>	<input type="button" value="Delete"/>

Outbox
Inbox
PR-MA

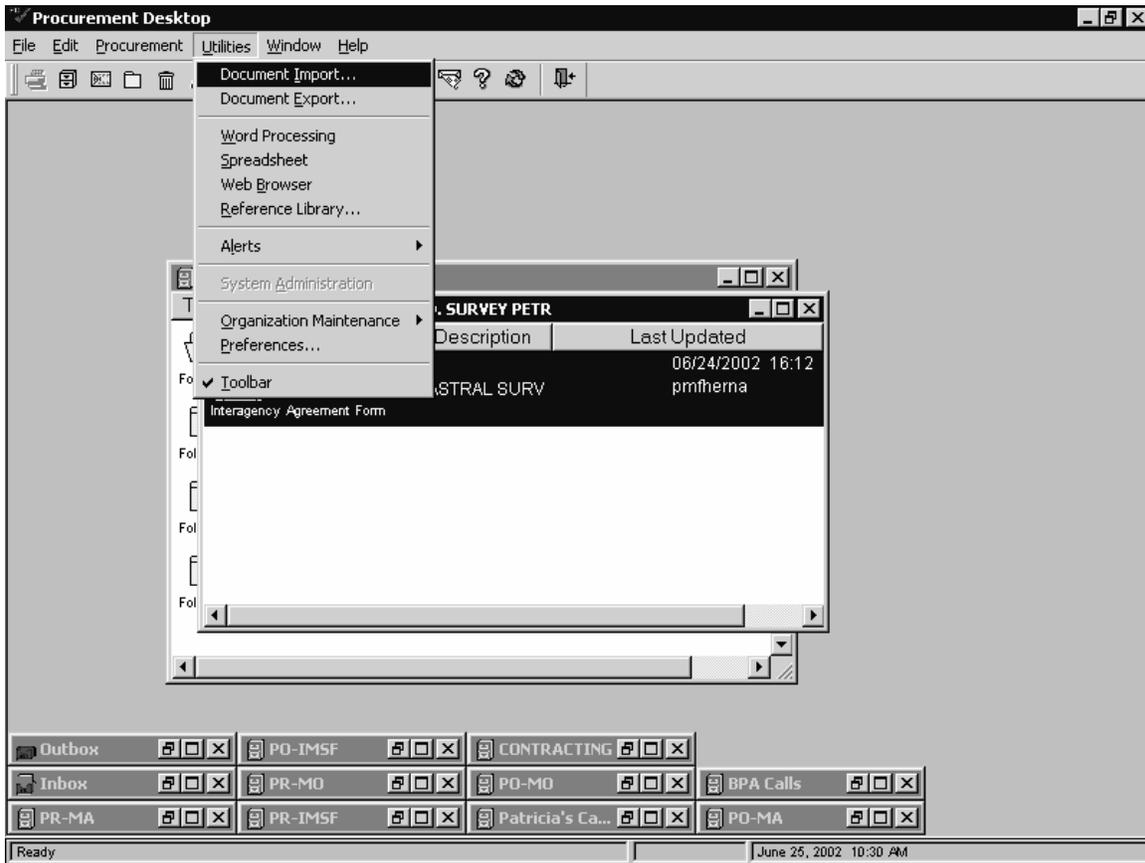
Ready | June 24, 2002 4:40 PM

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3. Attach a copy of the interagency acquisition agreement to the Interagency Agreement Form. Go to “Utilities” and select “Document Import.” The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.

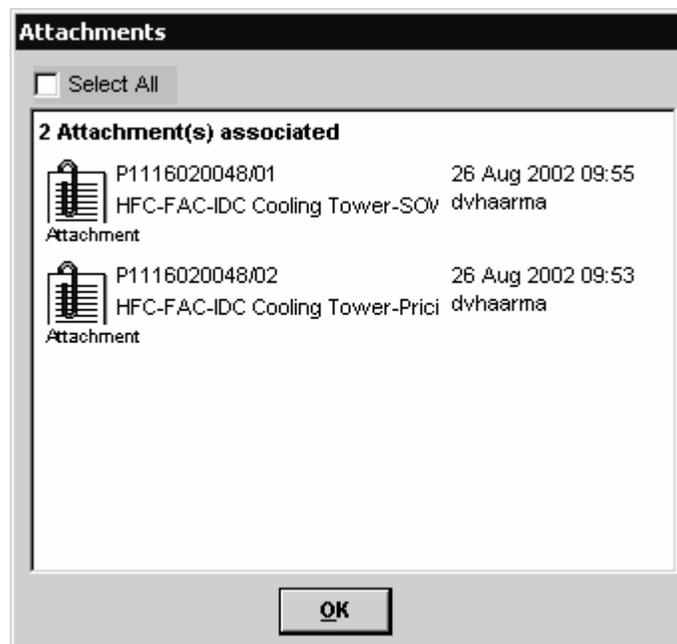


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If you are obligating funds through this interagency acquisition agreement:

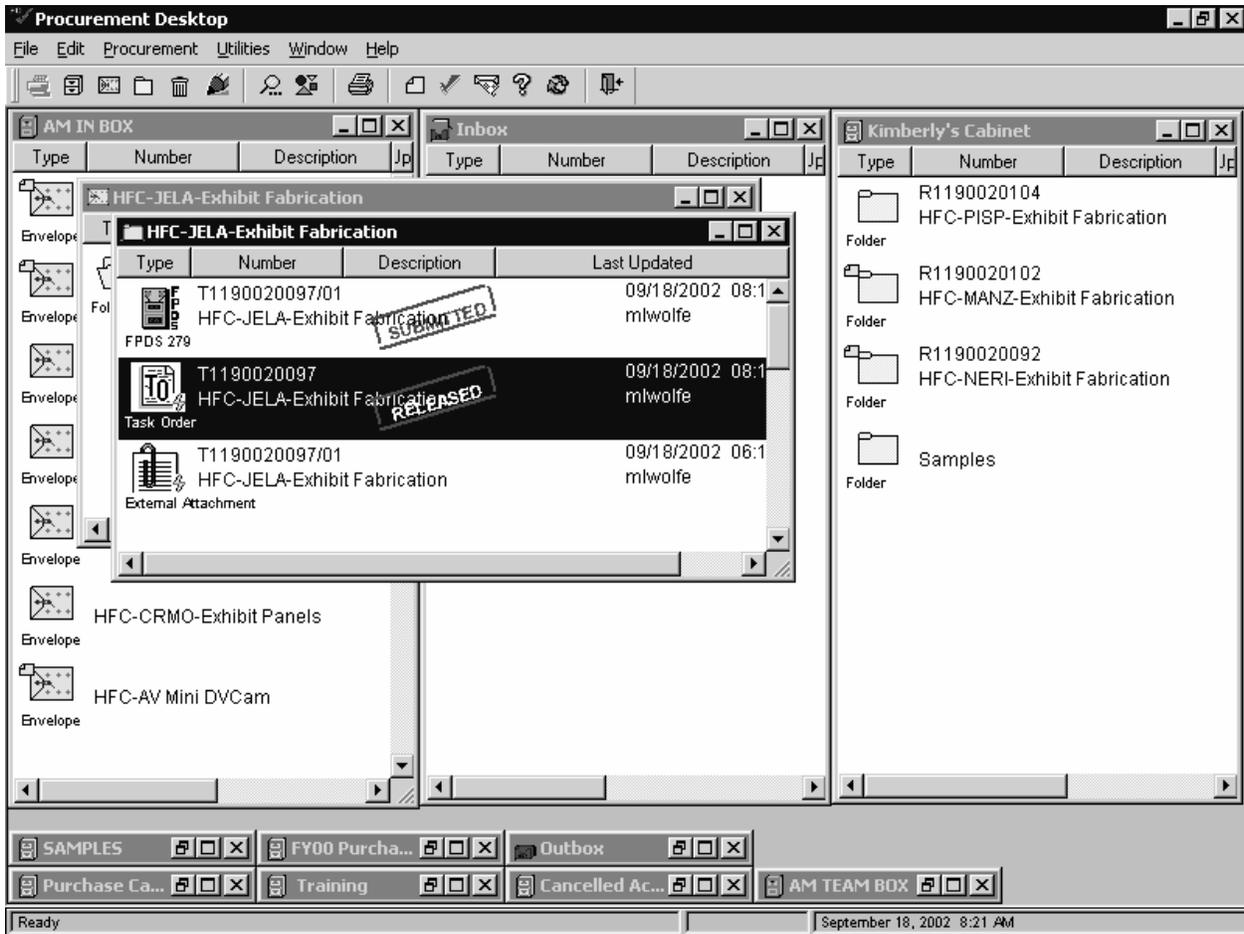
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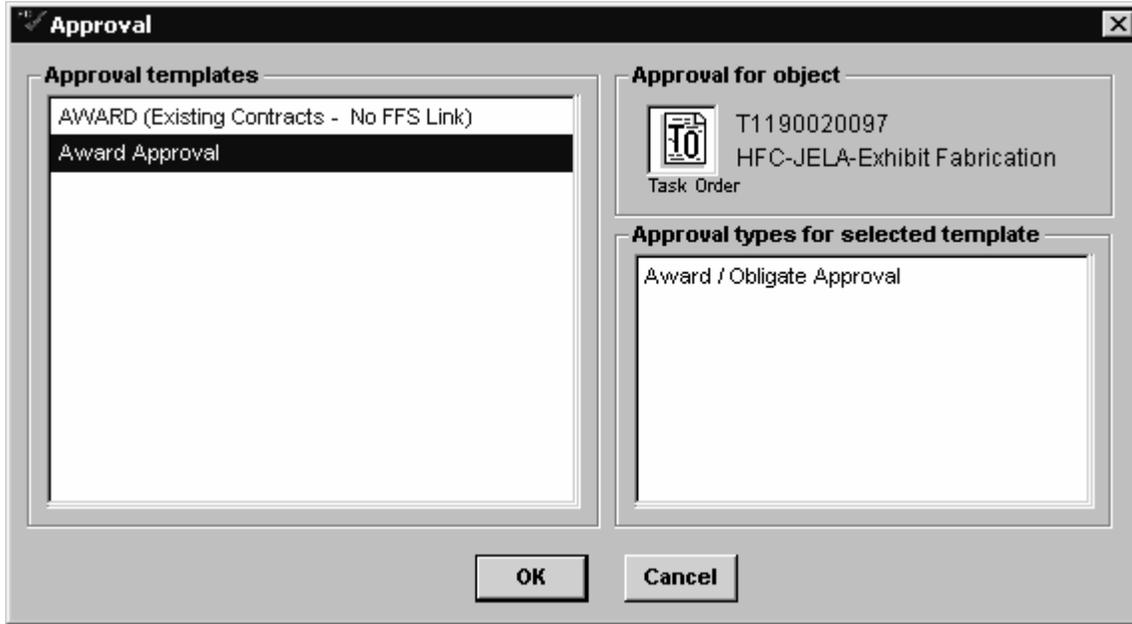
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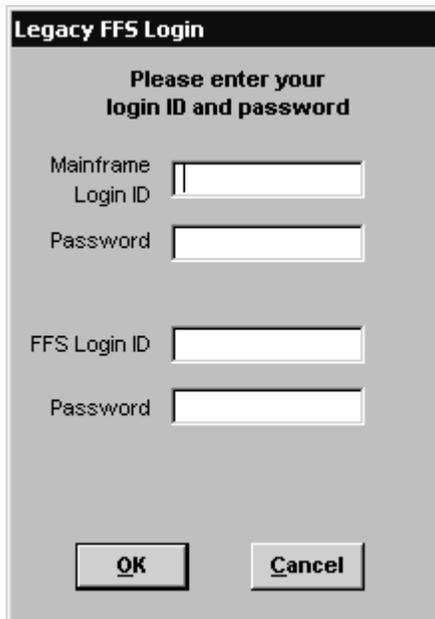


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7. Approve using the “Award Approval” option.



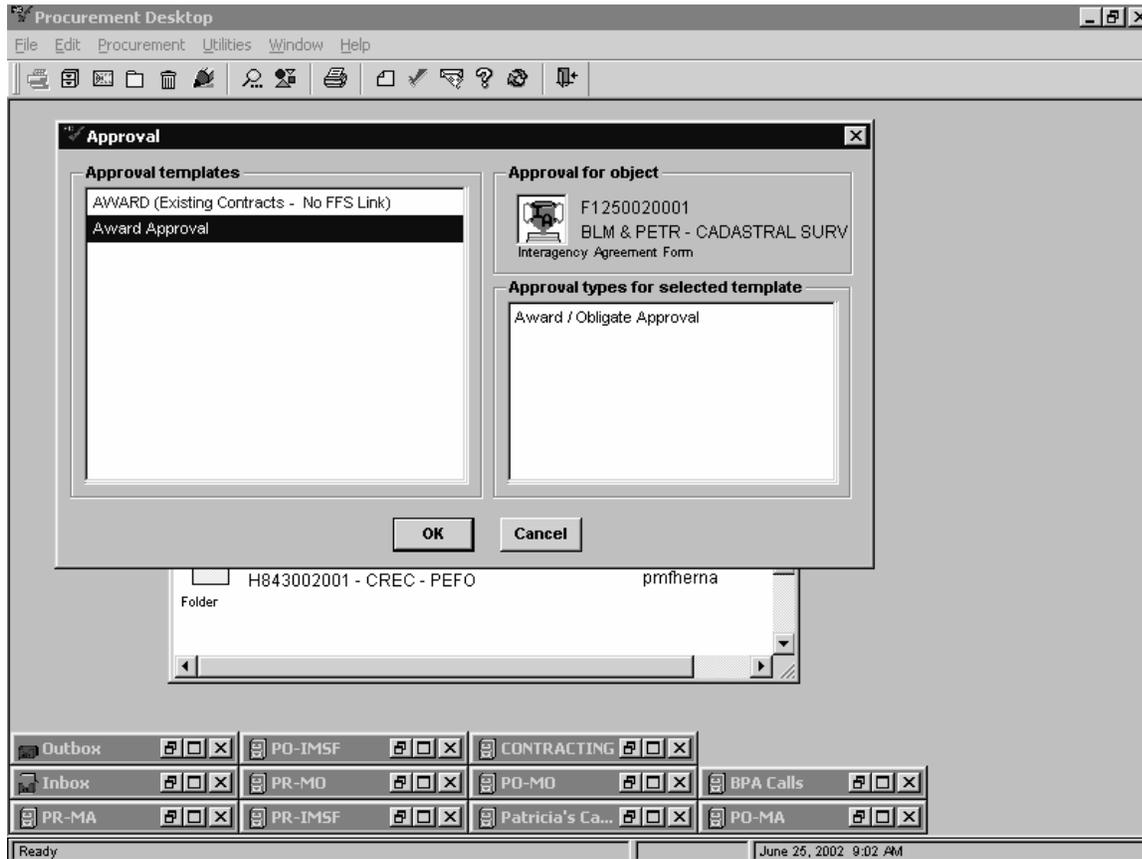
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If not obligating funds through this interagency acquisition agreement:

4. Use the “AWARD (Existing Contracts – No FFS Link)” template.

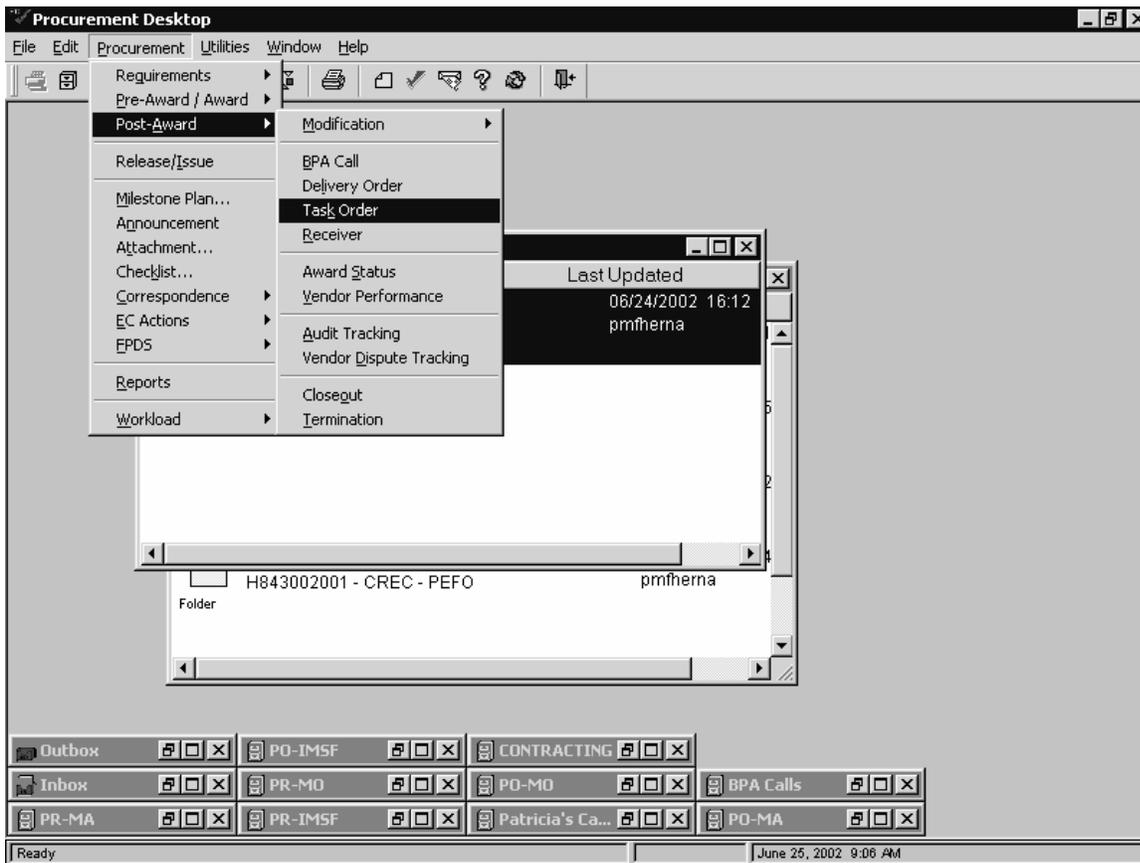


5. Once this template is “Approved,” then go to “Procurement” and select “Release/Issue.”

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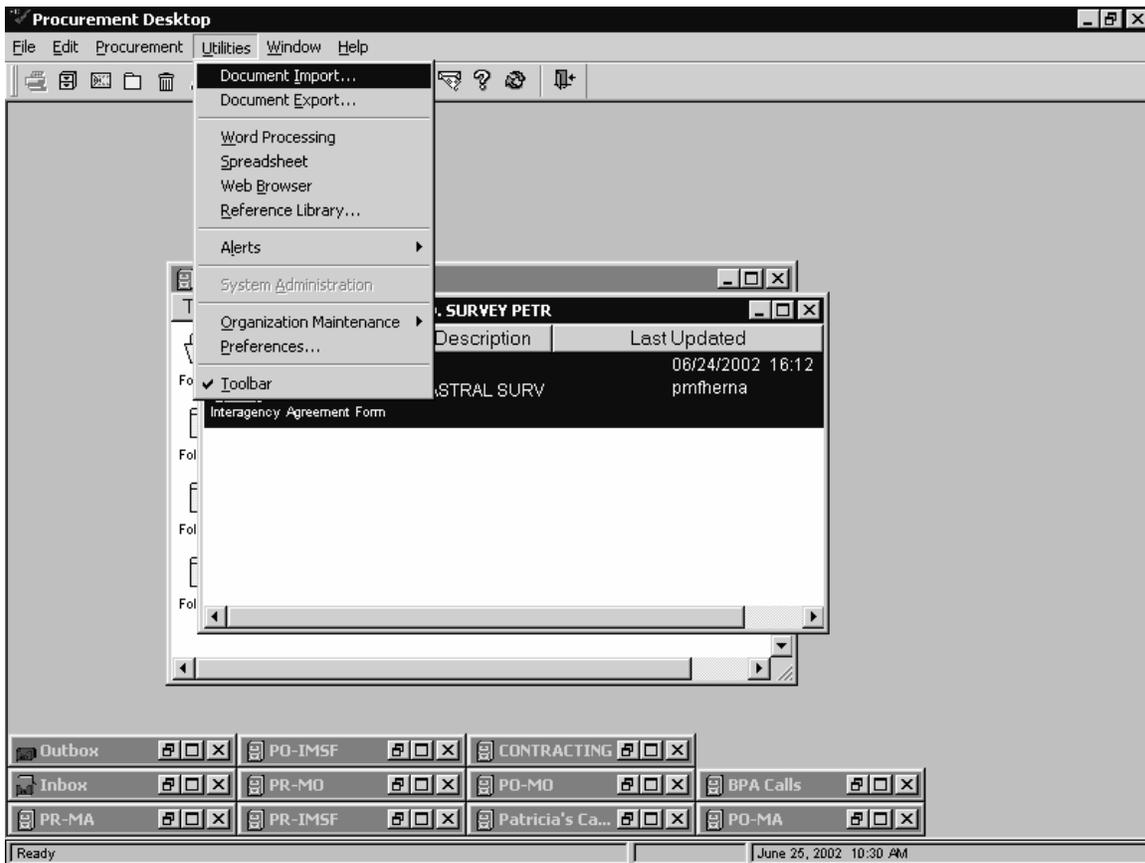
CREATING A TASK AGREEMENT TO AN INTERAGENCY ACQUISITION AGREEMENT:

1. Highlight the interagency agreement form you created. Choose “Procurement,” “Post-Award,” and “Task Order.”



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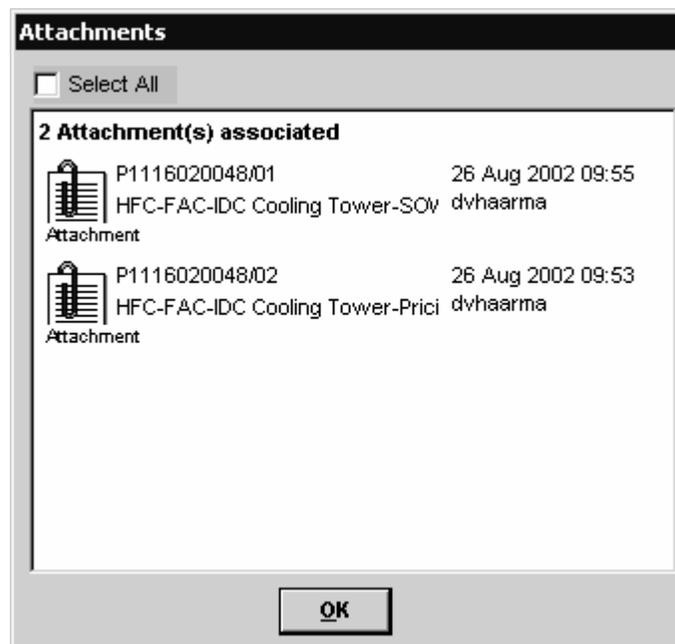
5. Attach a copy of the interagency acquisition agreement to the OF-347. Go to “Utilities” and select “Document Import.” The document you are importing must be on a local drive or a disk; it cannot be on a shared network drive.



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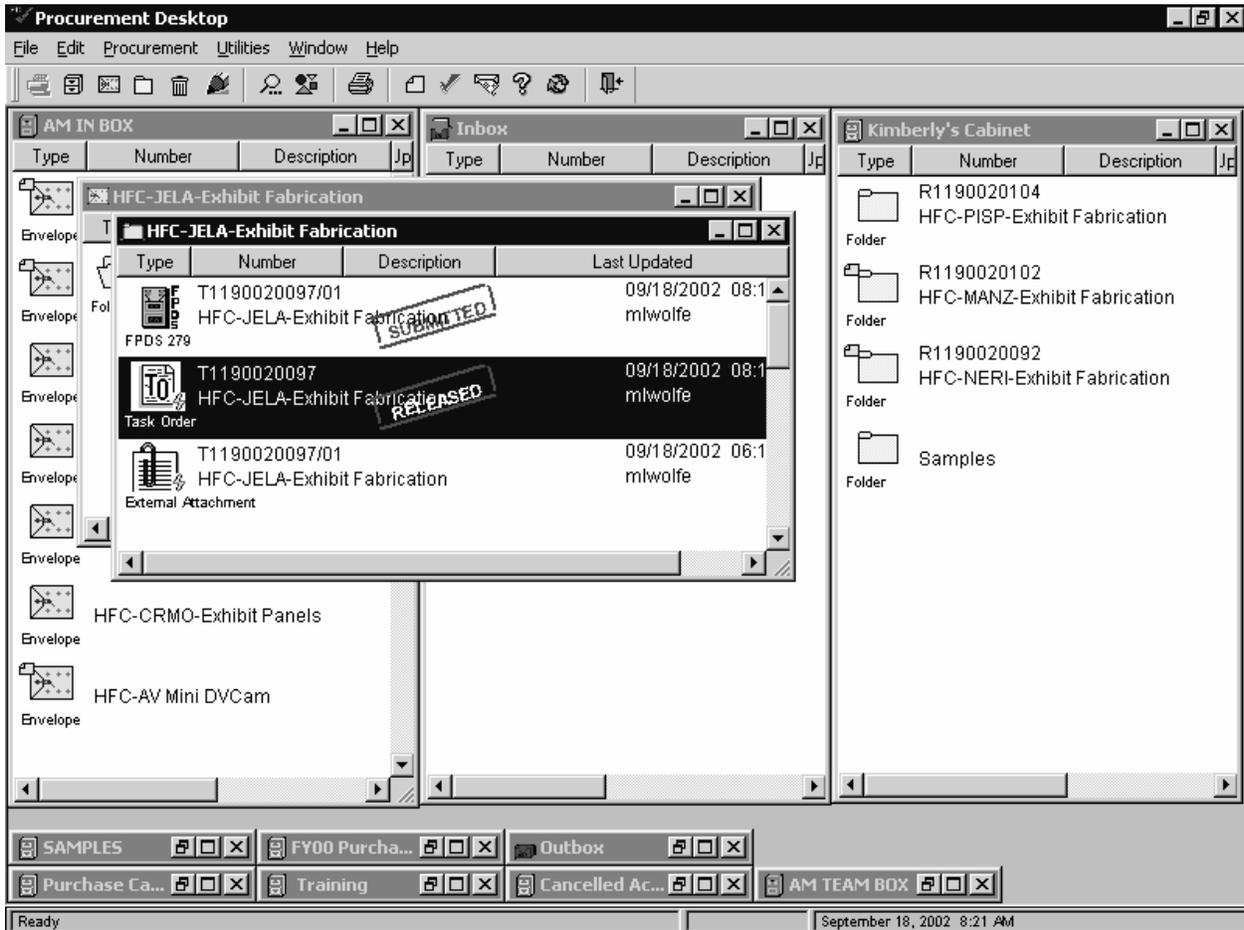
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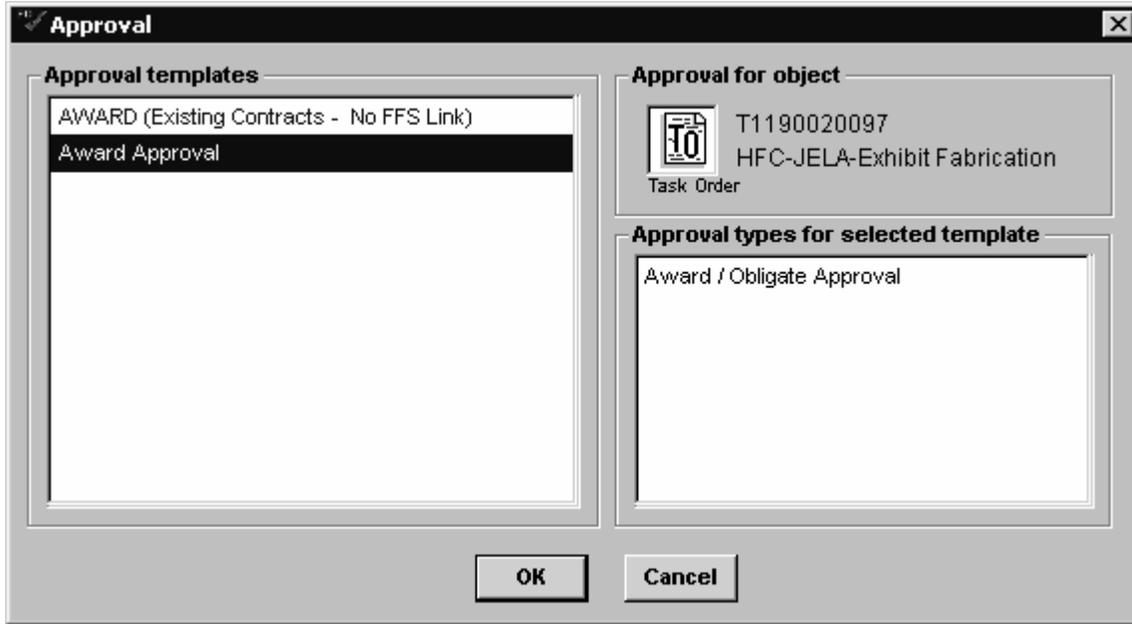
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