

SPMS Subcontracting Plan Management System



User Manual for Small Business Specialists

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1 Introduction

1.1 What is SPMS?

The **Subcontract Plan Management System** (SPMS) automates the submission and approval of Small Business Subcontract Plans for the Defense Energy Support Center (DESC).

- Offerors can use SPMS to create and submit plans to DESC for approval.
- Approving officials (Contract Specialists, Contracting Officers and Small Business Specialists) can use SPMS to view, sign and approve plans through the stages of the approval process.
- Contract Officers can use SPMS to load contracts into the system and incorporate approved plans into actual contracts.
- Small Business Specialists can use SPMS to monitor the plan submission process, perform contract reviews and load contractors' Subcontract Reports (Standard Forms 294 and 295) into the system.
- SPMS provides automated email reminders and online reports to all different user roles to help facilitate the electronic processes.

1.2 User Roles

SPMS uses a role-based electronic approval system. Each user role has a different set of responsibilities. Therefore, each user role is authorized to use a specific set of functions within the system. Some functions behave differently depending on the user that is performing them, and not all functions are available for each user role. The roles are as follows:

- **Offeror** – The Offeror, sometimes referred to as the Prime Contractor, is a non-government employee who is responsible for submitting subcontracting plans. They can submit plans for more than one company or corporate profit center.
- **Contract Specialist** – The Contract Specialist, abbreviated as CS, is a DESC employee who is responsible for the initial review of the plan. They decide whether or not to forward it on to a Contracting Officer for further review, or return it to the Offeror for rework. Contract Specialists are assigned to one of the Commodity Business Units (CBU) and can review any subcontracting plan that is submitted within their CBU.
- **Contracting Officer** – The Contracting Officer, abbreviated as CO, is a DESC employee who has the primary decision-making authority for approving

subcontracting plans. They review the plan at several stages: Initially when the plan is forwarded to them by the Contract Specialist they decide whether or not to “accept” the plan and forward it to the next level of review. Second, if the plan requires a 2nd-level signature authority they are responsible to approve it. Finally, after the Small Business Specialist has reviewed the plan, they decide whether or not to grant it final approval and incorporate it into a contract. The Contracting Officer is also responsible for maintaining the contracts stored within SPMS. Contracting Officers are assigned to one of the Commodity Business Units (CBU) and are responsible for all plans that are submitted within their CBU.

- **Small Business Specialist** – The Small Business Specialist, abbreviated as DU, is a DESC employee from the DESC-DU Small Business Office. They review subcontracting plans that have been forwarded to them by the Contracting Officer and return their recommendations. The Small Business Specialist is responsible for monitoring the plan submission process to ensure compliance. They are also responsible for performing contract reviews and for loading subcontract reports (forms SF294 and SF295) received from contractors into SPMS.
- **Administrator** – The Administrator is responsible for assigning users, loading electronic signatures into the system, assigning companies and corporate profit centers, assigning SBA representatives, monitoring and setting email routing, and maintaining the data within the system.

1.3 Scope

This user manual provides responsibilities and functions for Small Business Specialists only. Responsibilities and functions for Offerors, Contract Specialists, Contracting Officers and Administrators are discussed in other user manuals.

1.4 Document Organization

The different sections of this user manual correspond to each of the user roles. To find information on a specific function, please go to the section that relates to the specific user role you are performing in SPMS.

2 Accessing SPMS Welcome Screen

Anyone with access to the Internet can access the SPMS welcome screen by navigating to <https://spms.desc.dla.mil>. You may access SPMS using Internet Explorer 5.5 or higher or Netscape Navigator 4.7 or higher. Once you access SPMS, you will see the screen shown in Figure 1.

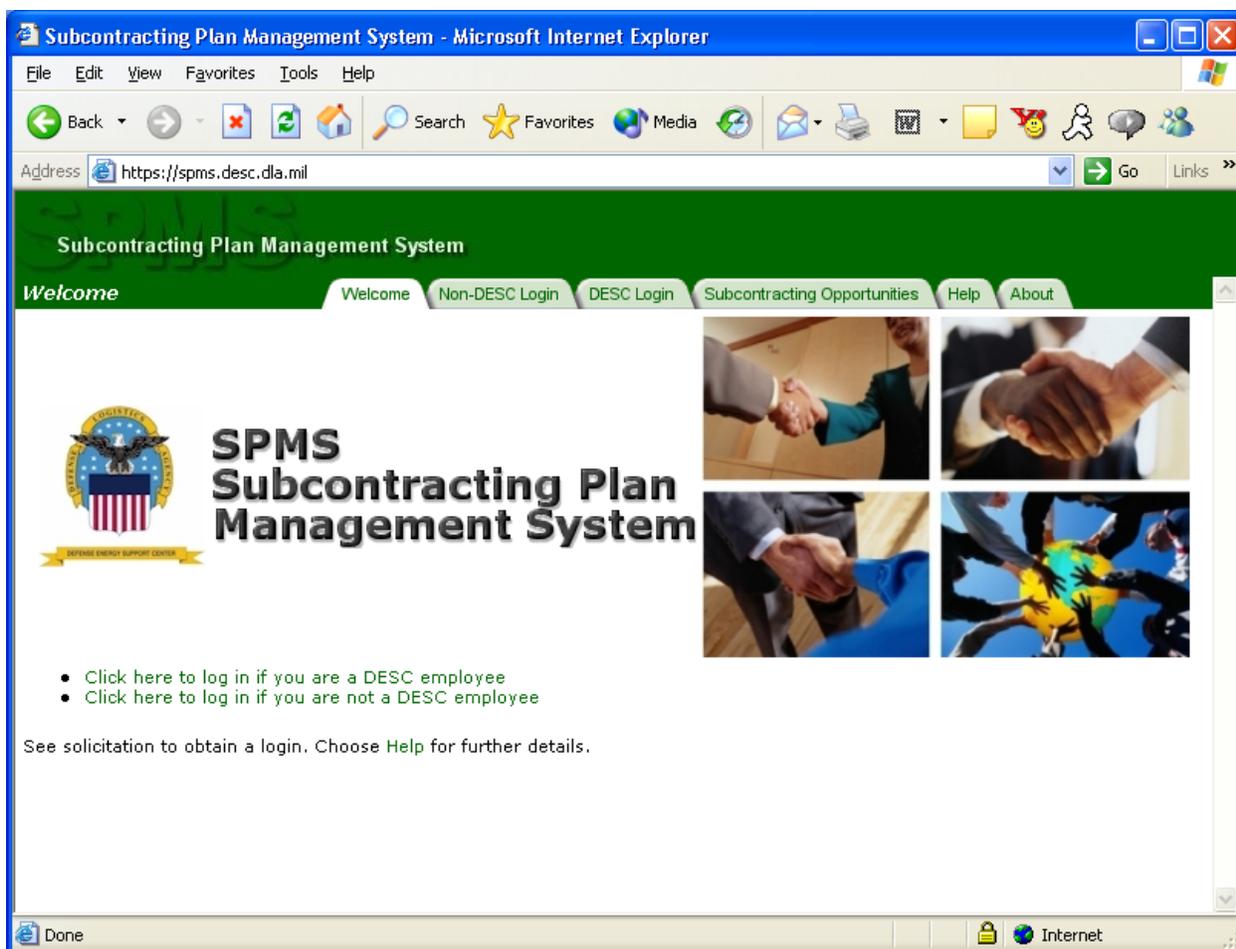


Figure 1: The SPMS welcome screen.

3 Logging On to SPMS

If you have a SPMS User ID, you can log into SPMS using one of two methods. After establishing your account, the SPMS Administrator will advise you which login method is appropriate for you.

3.1 Requesting a User ID

You must obtain a SPMS User ID before you can log into SPMS. To obtain a User ID, you must submit a DESC System Access Request using the SPMS system (<https://spms.desc.dla.mil>). For assistance, contact the DESC Help Desk at 1-800-446-4950.

In addition to a User ID and Password, you may also need to submit your signature to DESC so that it can be used to electronically sign forms. The SPMS Administrator will instruct you on the necessary procedures.

3.2 DESC Login

This login method is appropriate for users who have a DESC network User ID and Password. To log in this way, click on the tab labeled “DESC Login” then click the blue button labeled “Log In.” The system may display a gray log in box that prompts you to enter your domain/DESC network user name and password. Enter your DESC network user ID and password; then click the ‘OK’ button on the gray box. SPMS will verify your information and then direct you to the ‘Welcome to SPMS’ screen.

3.3 Non-DESC Login

This login method is appropriate for users who do not have a DESC network User ID and Password. To log in this way, you must use the SPMS User ID and Password that were assigned to you by the SPMS Administrator. Click on the tab labeled “Non-DESC Login” and input your User ID and Password. SPMS will verify your information and direct you to the ‘Welcome to SPMS’ screen.

4 System Navigation

Once you have successfully logged in to SPMS, it will display the ‘Welcome to SPMS’ screen. Figure 2 displays the ‘Welcome to SPMS’ screen that you will see after logging in.

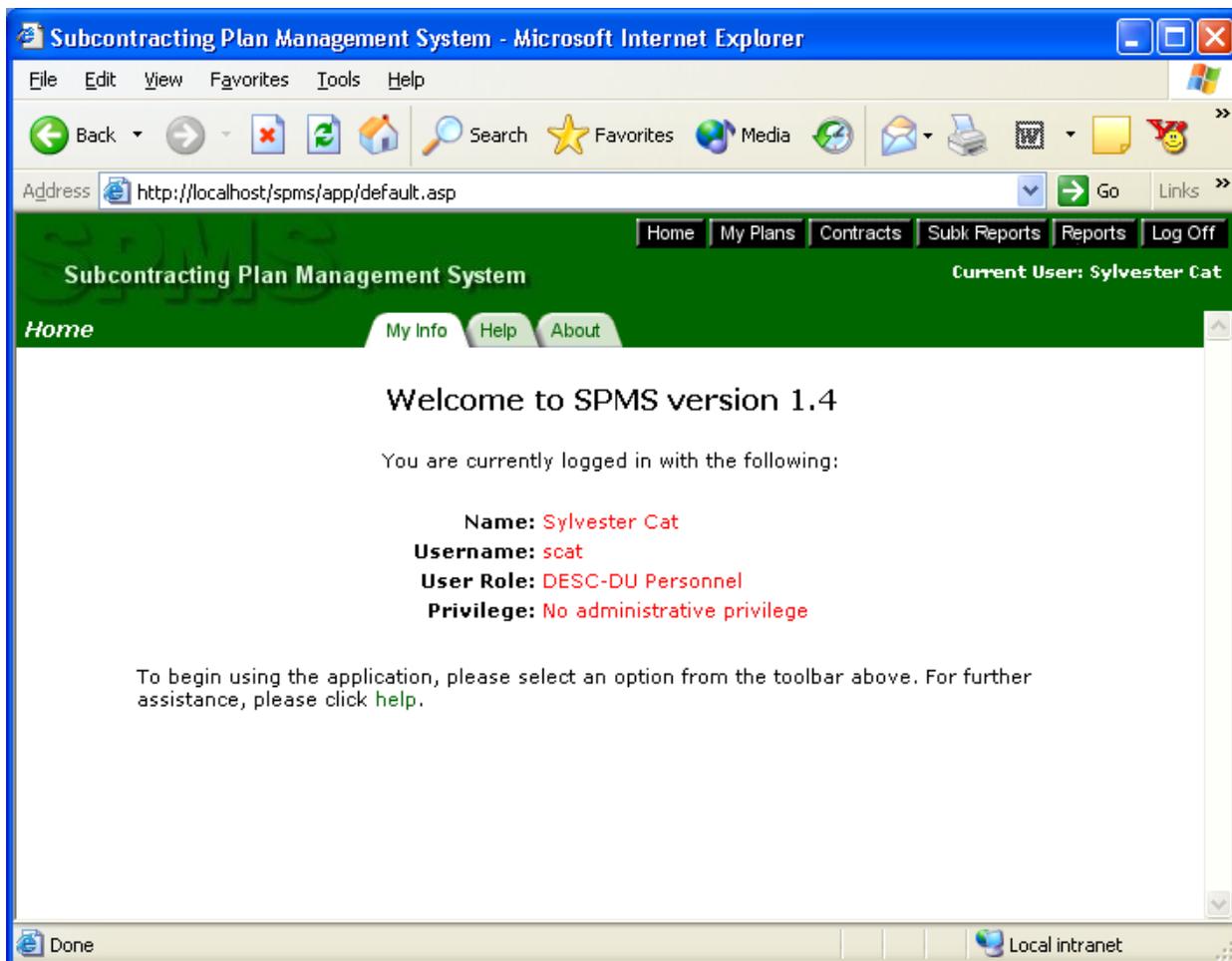


Figure 2: The 'Welcome to SPMS' screen appears after you have successfully logged in.

Across the top is the SPMS navigation toolbar that will be displayed throughout your SPMS session so you can easily navigate through the system's functionality. Each button on the toolbar selects a different functional grouping within the system. Letting the cursor hover briefly over a button will display a short description of each function. Along the bottom of the navigation toolbar are a series of green tabs, which represent the different functions that can be performed within the selected functional grouping. The function that is currently selected is displayed with a white tab, and the other functions are displayed with light green tabs. Below this banner is a large working area to perform the selected function.

Many screens in SPMS display a help symbol (🔍) next to a topic. Clicking this icon will open a screen with help information on that topic.

Figure 5 is an example of the welcome screen for the Small Business Specialist user role. This screen can be returned to at any time by selecting the Home button on the toolbar. The far right section of the toolbar displays the user's name. The working area displays the user's full name, SPMS username, user role, and administrative privileges.

5 Home button

The 'Home' functional group (**Home**) returns you to the 'Welcome to SPMS' screen and displays other system information. The functions include:

- My Info
- Help
- About
- Change Password (available for Non-DESC logins only)

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

5.1 My Info

Clicking on the 'My Info' function displays the 'Welcome to SPMS' screen, which is the first screen you will see after logging in. This screen provides you with all of the necessary information to know what privileges you have in SPMS. This screen displays the user's full name, SPMS username, user role, and administrative privileges.

5.2 Help

The 'Help' function displays system requirements and information on obtaining help.

5.3 About

The 'About' function displays system version and release date information.

5.4 Change Password

This function is available for users who log in using the 'Non-DESC' login button. When you first log into SPMS, you should use this function to change the password given to you by the SPMS administrator. Your password must consist of alphanumeric characters (a-z, A-Z, 0-9) and it is case-sensitive.

6 Reviewing Subcontracting Plans

The 'My Plans' (**My Plans**) functional group provides all the functions necessary to review the subcontracting plans within your CBU. There is only one screen within this group from which you can perform the necessary review and approval actions.

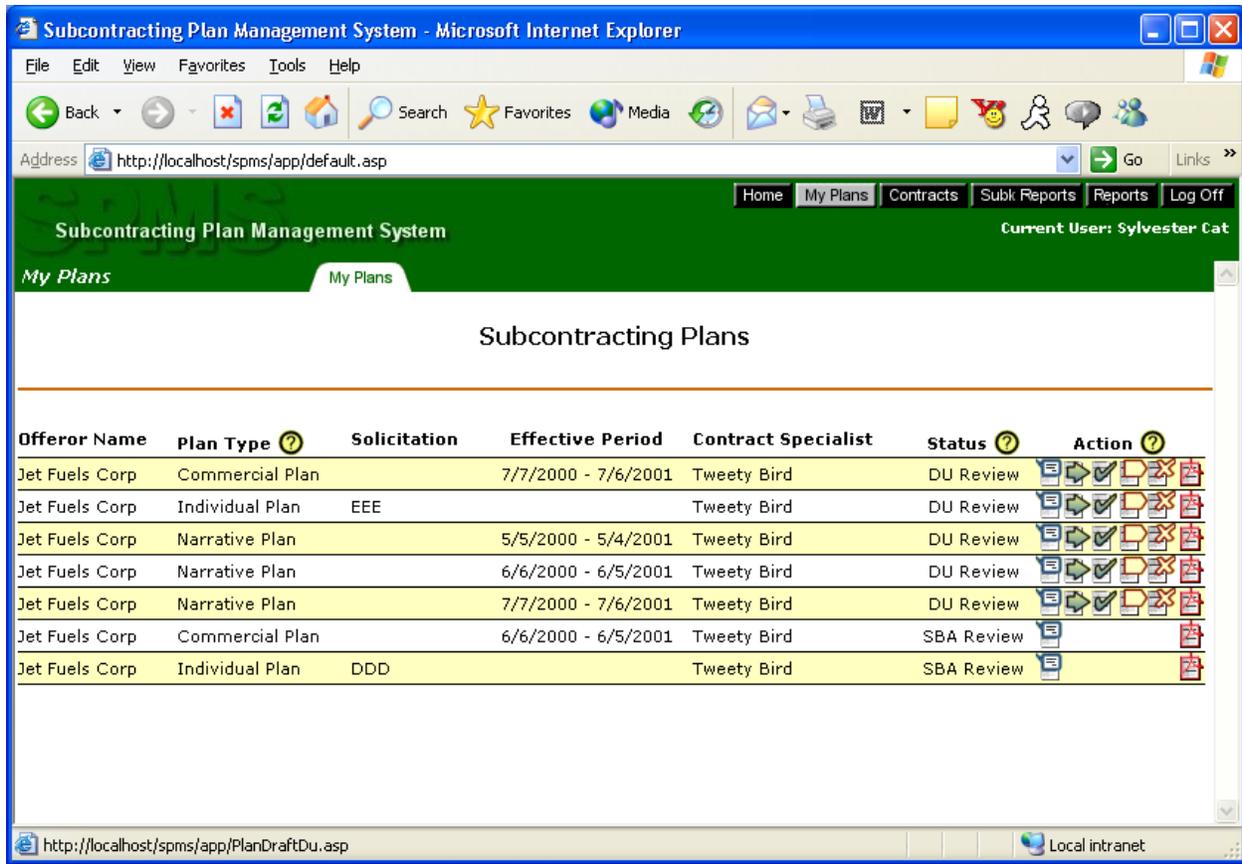


Figure 3: The 'My Plans' function displays all plans that have been submitted to the Small Business Specialist for review.

6.1 My Plans Screen Overview

The 'My Plans' function displays a list of all subcontracting plans that have been submitted to the Small Business Specialist for review. The left portion of the screen lists information on the plans. The right portion of the screen provides a series of icons to perform actions on the plan listed in that row. The columns include:

- Offeror Name – This is the name of the company or corporate profit center for which the plan was created. It is possible to create plans for several different companies or corporate profit centers within a company.
- Plan Type – This lists the type of plan.
- Solicitation – This lists the solicitation number for which the plan is being submitted.
- Effective Period – This lists the dates for which the plan is active.
- Contract Specialist – The name of the Contract Specialist who is assigned to the plan.

- Status – This lists the status of the plan in the review process.

You can perform various actions on a plan using the action icons. Some actions may not be available for each plan, depending on the status of the plan. To perform an action, click the desired icon to the right of the plan. The actions include:

-  View Comments – Displays all comments included on the plan as it was routed between different approving officials.
-  View Plan in Adobe Acrobat – Opens the plan for viewing using Adobe Acrobat PDF format.
-  View Plan – Opens the plan for viewing in plain text format when the Adobe Acrobat PDF format is not available.
-  Forward Plan to SBA – Forward the plan to the Small Business Administration (SBA) representative who is assigned to its mailing state.
-  Concur – Concur with the plan and return to the Contracting Officer for final approval.
-  Concur With Contingency – Provide a contingency for concurrence with the plan and return to the Contracting Officer for final approval.
-  Nonconcur – Do not concur with the plan and return to the Contracting Officer for further review.

The following sections discuss the actions.

6.2 Reviewing a Plan

When a subcontracting plan appears on this list, you must review it and make one of the following decisions:

- Concur
- Concur with contingency
- Nonconcur

When you take one of these actions, your electronic signature will be placed on the plan, the appropriate box will be checked for your concurrence decision and the plan will be returned to the Contracting Officer for further review. Use the View and View Comments actions to review the plan and make your decision. When you are ready, click the appropriate action icon for your concurrence decision.

6.3 Forwarding a Plan to SBA

Before you make your concurrence decision, you may wish to consult with the Small Business Administration (SBA) representative who covers the mailing state of the Offeror. This is not a required approval step. To forward the plan to SBA for review, click the 'Forward to SBA' action icon to the right of the plan. SPMS will automatically route the plan to the correct SBA representative based on the mailing state of the Offeror. The SPMS Administrator is responsible for keeping the names, emails and states of the SBA representatives up to date. When a plan is forwarded to SBA, it goes into 'SBA Review' status and you cannot take further action on the plan until the SBA representative has returned it back to you.

7 Contracts

The 'Contracts' functional group () provides all the necessary functions to add and upload contracts to SPMS. The functions include:

- Contracts
- Add
- Reviews

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

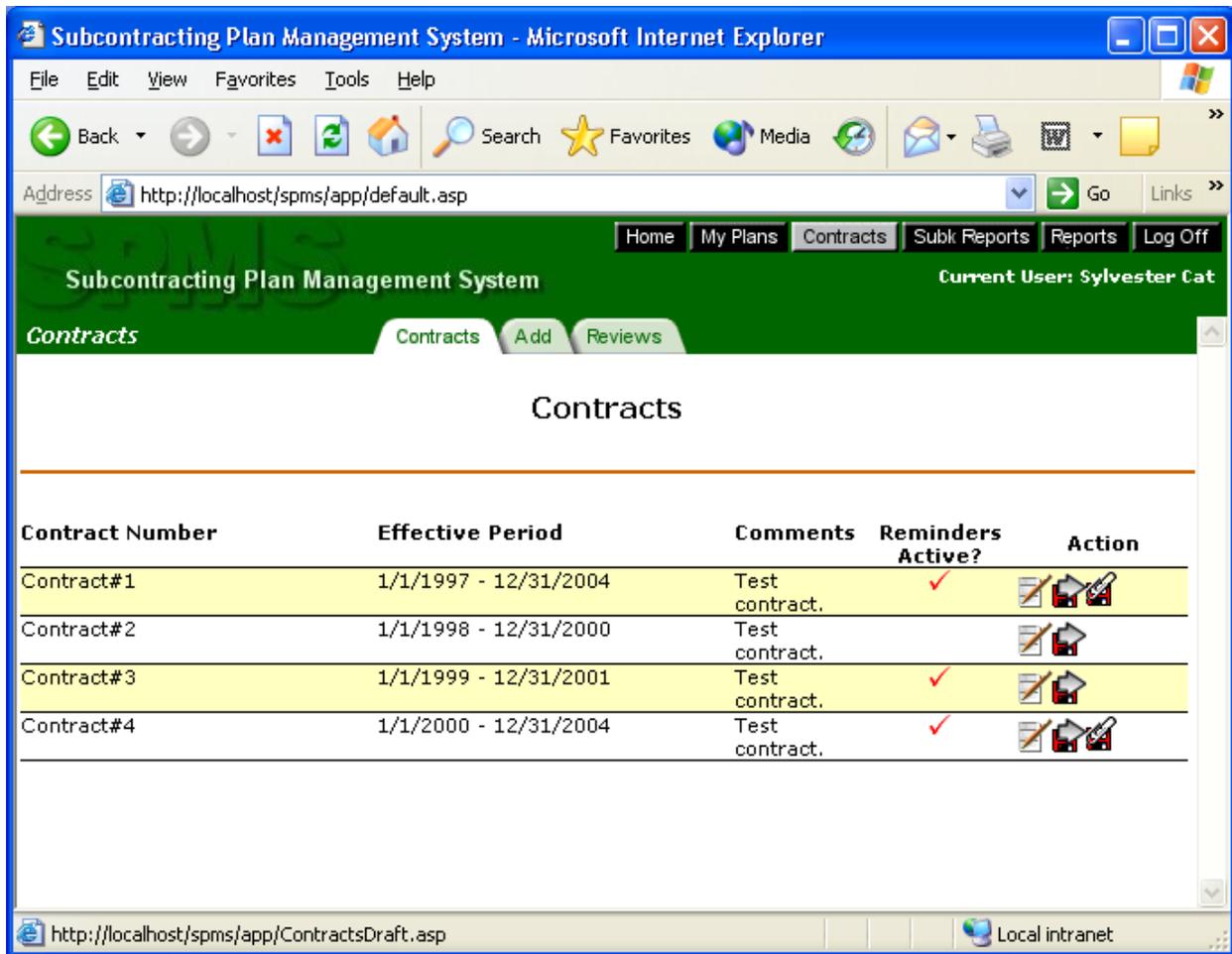


Figure 4: The 'Contracts' screen lists all contracts in the system.

7.1 Viewing Contracts

To view a list of all contracts in the system use the 'Contracts' function. SPMS will display the following columns:

- Contract Number
- Effective Period – This lists the dates for which the contract is active.
- Comments
- Reminders Active – This displays a check mark (✓) if email reminders have been turned on for this contract.

To the right of each contract are the following action icons:

- Edit – Edit the properties of this contract.

-  Upload – Upload an electronic copy of this contract into SPMS.
-  View – View the contract. This is only displayed after an electronic copy of the contract has been uploaded.

7.2 Adding a Contract

To add a new contract, use the ‘Add’ function. SPMS will display the ‘Add Contract’ screen where you can input the contract number, effective dates and comments. If you are entering a modification to a contract, simply include the extra characters for the modification number at the end of the contract number.

The ‘DCMA Reminders’ checkbox allows you to turn the email reminders feature on or off. When email reminders are turned on, SPMS will automatically send reminder emails to the contract reviewers when a contract is ready to expire. The email reminds them that they will need to perform a contract review, and the emails will continue to be sent at regular intervals until the review has been completed, or the email reminders feature is turned off.

To save the data, click the ‘Save’ button. SPMS will direct you to the contracts list. You can verify the contract was added by locating it in the list. If you wish to change the data you input, click the ‘Edit’ icon () to the right of the contract.

7.3 Uploading a Contract

SPMS allows you to upload electronic copies of contracts into the system so that they can be viewed at later date. Before uploading a contract, you will need to convert it to an electronic file. If you have a paper copy of the contract, scan it in using a scanner and save the file to your computer. SPMS accepts all file formats. To upload the file, use the ‘Upload’ action icon (). SPMS will direct you to an upload screen where you must browse to the file location on your computer and click ‘Ok’. After the file has been uploaded, you will be returned to the contracts list. You can verify that the contract was successfully uploaded by clicking the ‘View’ action icon () to the right of the contract.

7.4 Contract Reviews Screen Overview

To schedule and perform contract reviews, use the ‘Reviews’ function. SPMS will display the ‘Contract Reviews’ screen shown in Figure 5. This screen serves as your command center to perform all the necessary functions to schedule and perform contract reviews. This screen displays all contracts that require a contract review and the next scheduled review date. The left portion of the screen lists information on the contracts. The right portion of the screen provides a series of icons to perform actions on the contract listed in that row. The columns include:

- Contract Number

- Effective Period – This lists the dates for which the contract is active.
- Next Scheduled Review – The date of the next scheduled contract review, if one has been assigned. To change the next scheduled review date, click the link in this column.
- Risk Level – This lists the risk level (low, medium, high) of the contract, if one has been assigned. To change the risk level, click the link in this column.

You can perform various actions on a contract using the action icons. Some actions may not be available for each contract, depending on the status of the review. To perform an action, click the desired icon to the right of the plan. The actions include:

-  Perform Review – Input data from the contract review and upload the contract review form into SPMS.
-  View – View the contract. This is only displayed if an electronic copy of the contract has been uploaded.
-  Delete – Delete this scheduled contract review and let SPMS re-schedule the next review according to the review schedule.

The following sections discuss the actions.

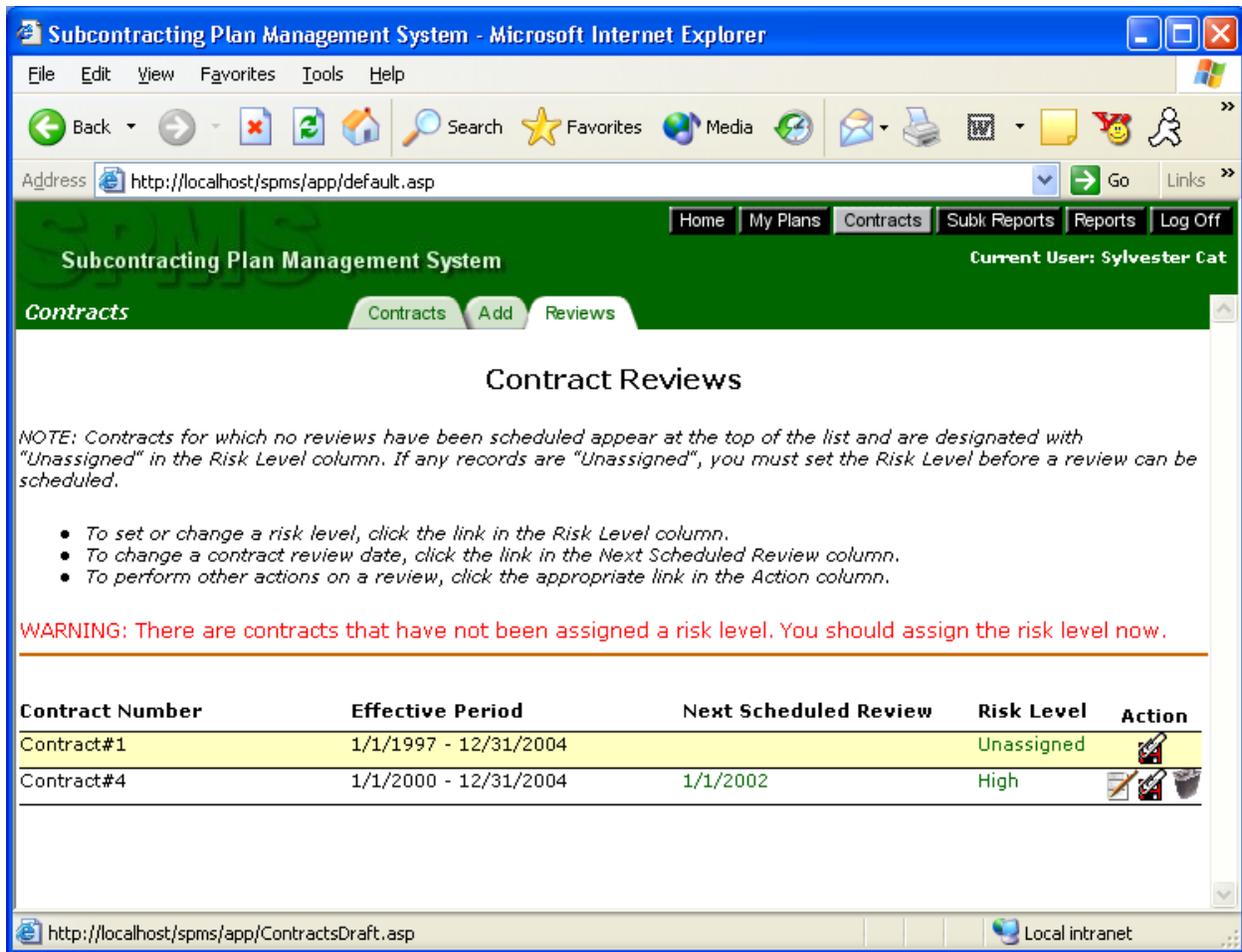


Figure 5: The 'Contract Reviews' screen.

7.5 Contract Risk Levels and Review Schedules

SPMS automatically schedules each contract review date based on the contract's risk level, contract length and previous review date. All contracts that are currently active and that have a subcontracting plan incorporated into them will appear on the contract review list. The following table illustrates the review schedule guidelines:

Contract Length	Risk Level	Review Schedule
More than 1 year	High	Begin date; each interval $\frac{1}{4}$ of the length of the contract; end date
More than 1 year	Medium	Begin date; every 18 months; end date
More than 1 year	Low	Begin date; midpoint of the contract; end date

1 year or less	High	Begin date; every 3 months; end date
1 year or less	Medium	Begin date; every 6 months; end date
1 year or less	Low	Begin date and end date only

7.6 Setting the Risk Level

Because SPMS depends on the contract's risk level in order to schedule the review dates, it cannot schedule the first contract review until the risk level has been established. When a new contract is incorporated that doesn't have a risk level, the contract will appear at the top of the 'Contract Reviews' screen with a risk level of 'Unassigned'. Whenever a contract is in this status, you must assign the risk level.

To assign the risk level, click the green link in the Risk Level column for the contract. SPMS will display the 'Set Risk Level' screen where you can choose the risk level. After you have saved the risk level, SPMS will automatically schedule the first contract review date. You can verify the review has been scheduled by locating the contract in the list and checking the 'Next Scheduled Review' column.

You can change a risk level that has already been established by using the same method. SPMS will re-schedule the next contract review date using the new risk level.

7.7 Setting the Contract Review Dates

SPMS automatically calculates the next review date. You do not have to set the review dates yourself.

However, if you wish to override the dates selected by SPMS, you can. To change the scheduled review date, click the green link in the Next Scheduled Review column for the contract. SPMS will display the 'Set Review Date' screen where you can input the desired date. After you have saved the review date, you will be returned to the Contract Reviews list and the new review date will appear in the Next Scheduled Review column.

7.8 Performing the Contract Review

Contract reviews are a two-part process. First is the actual review. On the date of the contract review, the designated contract reviewer should perform the review and fill out the appropriate form. This process occurs externally to SPMS. Second, the contract review should return the completed form to the Small Business Specialist. The Small Business Specialist must then input the data from the form into SPMS and upload an electronic copy of the form.

To input the contract review into SPMS, use the 'Perform Review' action icon to the right of the contract. The first screen presented is the 'Part 1 - Upload Form' screen shown in Figure 6. You must upload an electronic copy of the contract review form. Browse to the location of the file on your computer and click 'Ok' to upload the file.

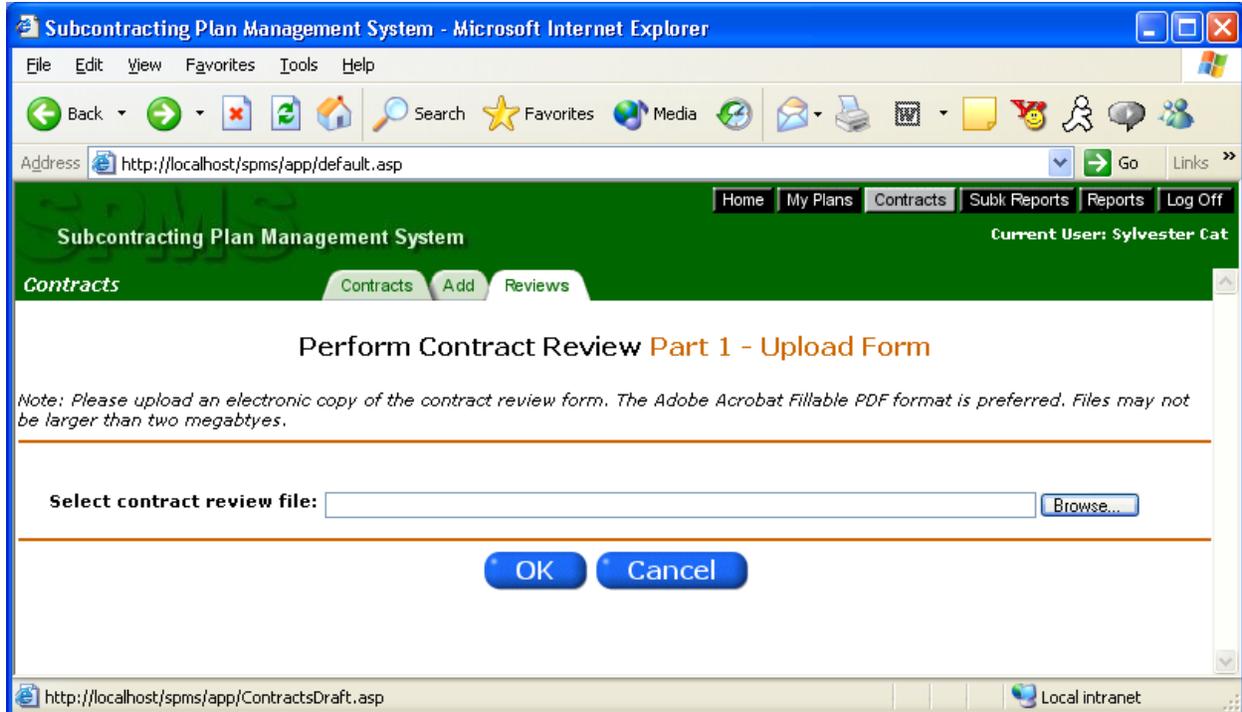


Figure 6: The first part of a contract review allows you to upload an electronic copy of the contract review form

After uploading the form, SPMS will direct you to the 'Part 2 – Set Risk Level' screen shown in Figure 7. This screen displays information from the previous review and allows you to view the previous contract review form, if available. To view the previous review form, click the 'View' icon (📄) in the upper right portion of the screen. If no previous review form is available, an icon will not be displayed. You must then set the review status to 'Satisfactory' or 'Unsatisfactory' and select a new risk level. Comments are optional. After you have saved the new risk level, SPMS will automatically schedule the next review date and you will be returned to the Contract Reviews list.

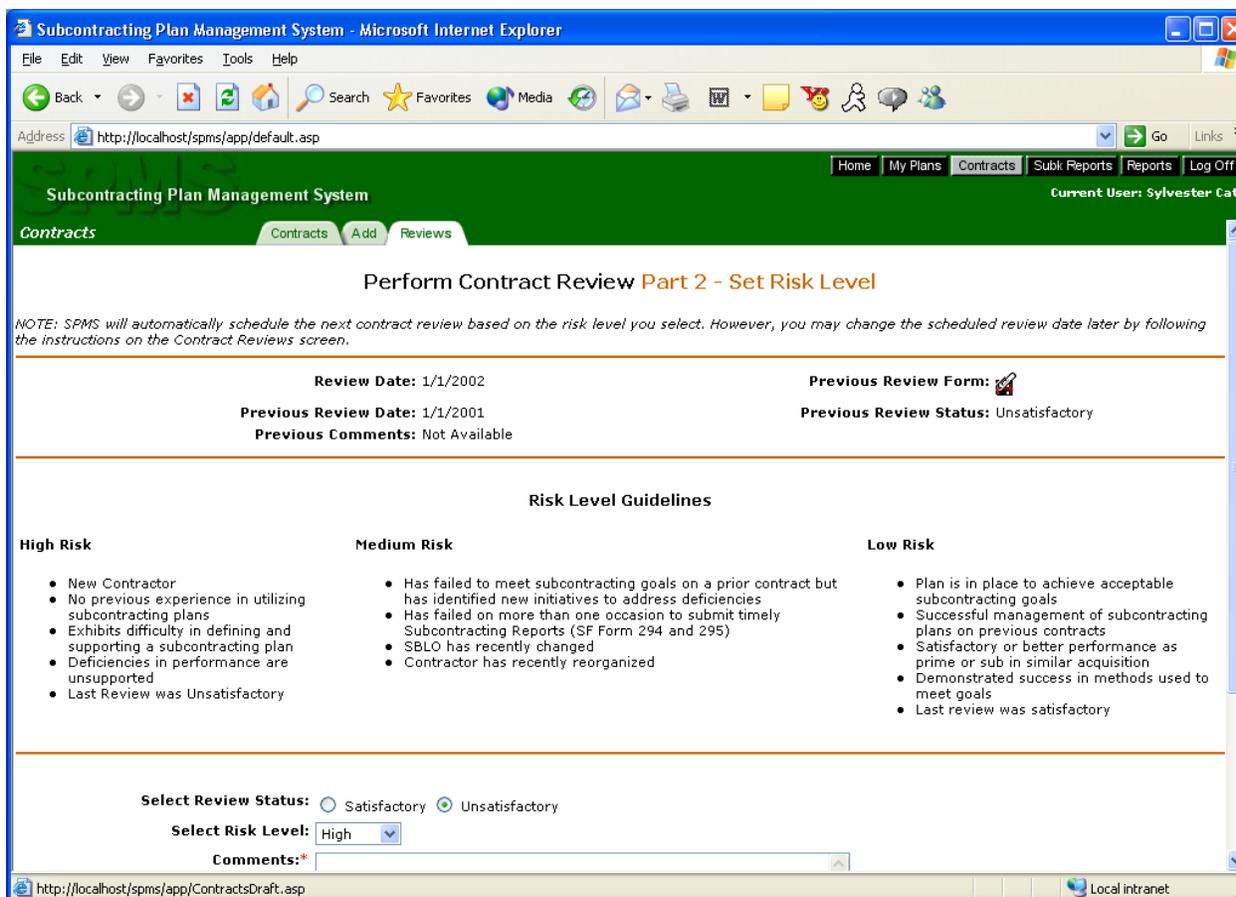


Figure 7: The second part of a contract review allows you select a new risk level.

8 Subcontracting Reports

SPMS provides for the electronic storage of subcontract reports received from contractors. The two types of subcontracting reports are Standard Form 294 – Subcontracting Report for Individual Contracts (SF 294) and Standard Form 295 – Summary Subcontract Report (SF 295). The ‘Subk Reports’ functional group (**Subk Reports**) provides all the necessary functions to add and upload subcontracting reports to SPMS. The functions include:

- Reports
- Add SF294
- Add SF295

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

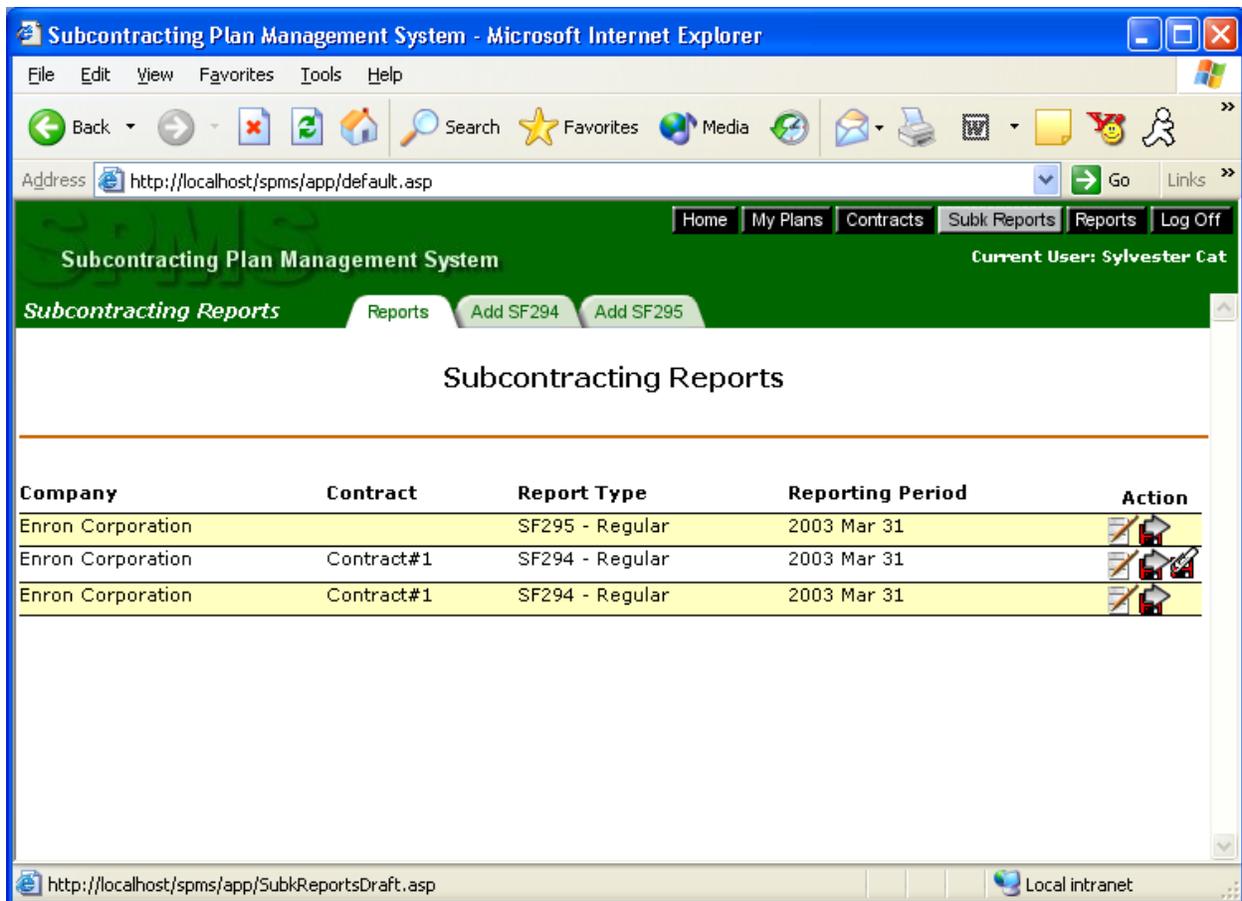


Figure 8: The 'Subcontracting Reports' screen displays all subcontracting reports in the system.

8.1 Subcontract Reports Screen Overview

The 'Reports' function displays a list of all subcontracting reports that have been loaded into SPMS. The left portion of the screen lists information on the subcontracting reports. The right portion of the screen provides a series of icons to perform actions on the subcontracting report listed in that row. The columns include:

- Company – This is the name of the company that submitted the report.
- Contract – Displayed only if the SF 294 was submitted. Displays the contract number input on the form.
- Report Type – Displays the type of report (SF 294 or SF 295) and if it is a Regular, Revised or Final report.
- Reporting Period – Displays the fiscal year and quarter of the report.

You can perform various actions on a report using the action icons. Some actions may not be available for each plan, depending on the status of the plan. To perform an action, click the desired icon to the right of the report. The actions include:

-  Edit – Edit the data on a subcontracting report.
-  Upload – Upload an electronic copy of the subcontracting report.
-  View – View the subcontracting report. Only displayed after an electronic copy of the subcontracting report has been uploaded.

8.2 Adding a Subcontracting Report

Adding a subcontracting report to SPMS is a two-part process. First you must key in the data from the subcontracting report form into SPMS. Then you can upload an electronic copy of the form for storage and viewing. To key in the data from the form, use the 'SF294' or 'SF295' function, depending on which type of form was used.

SPMS will direct you to the first screen of the subcontracting report input form, shown in Figure 9. The screens follow the same format as the forms, so key in the data from the form and follow the directions.

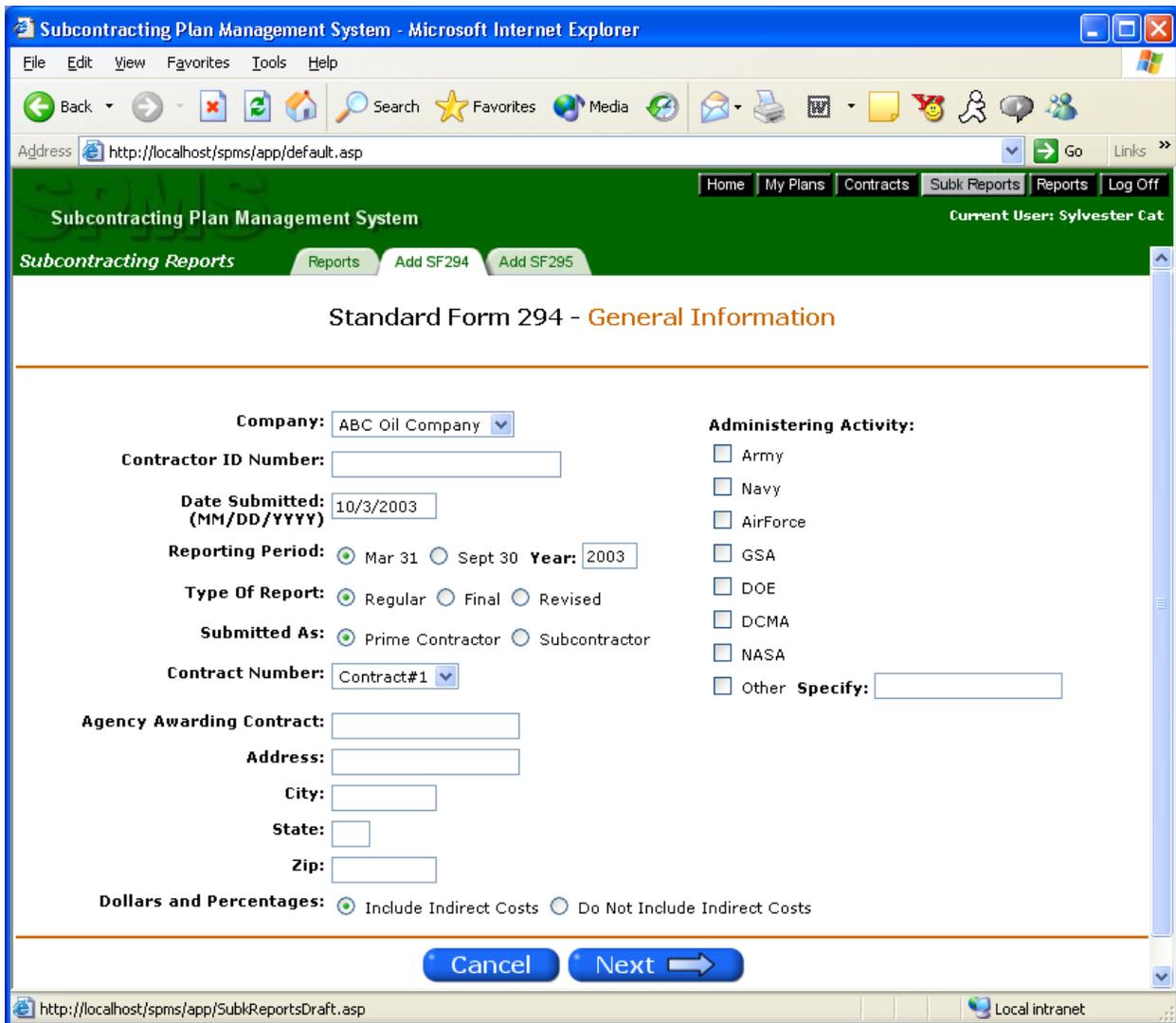


Figure 9: The first screen to input data from a SF 294 subcontracting report.

Click 'Next' to continue to the second screen. Key the data into the second screen then click 'Save' to save the data. SPMS will direct you to the Subcontracting Reports screen. You can verify that your data was saved by locating the new subcontracting report in the list. If you want to change the data you input, click the 'Edit' icon (✎) to the right of the subcontracting report.

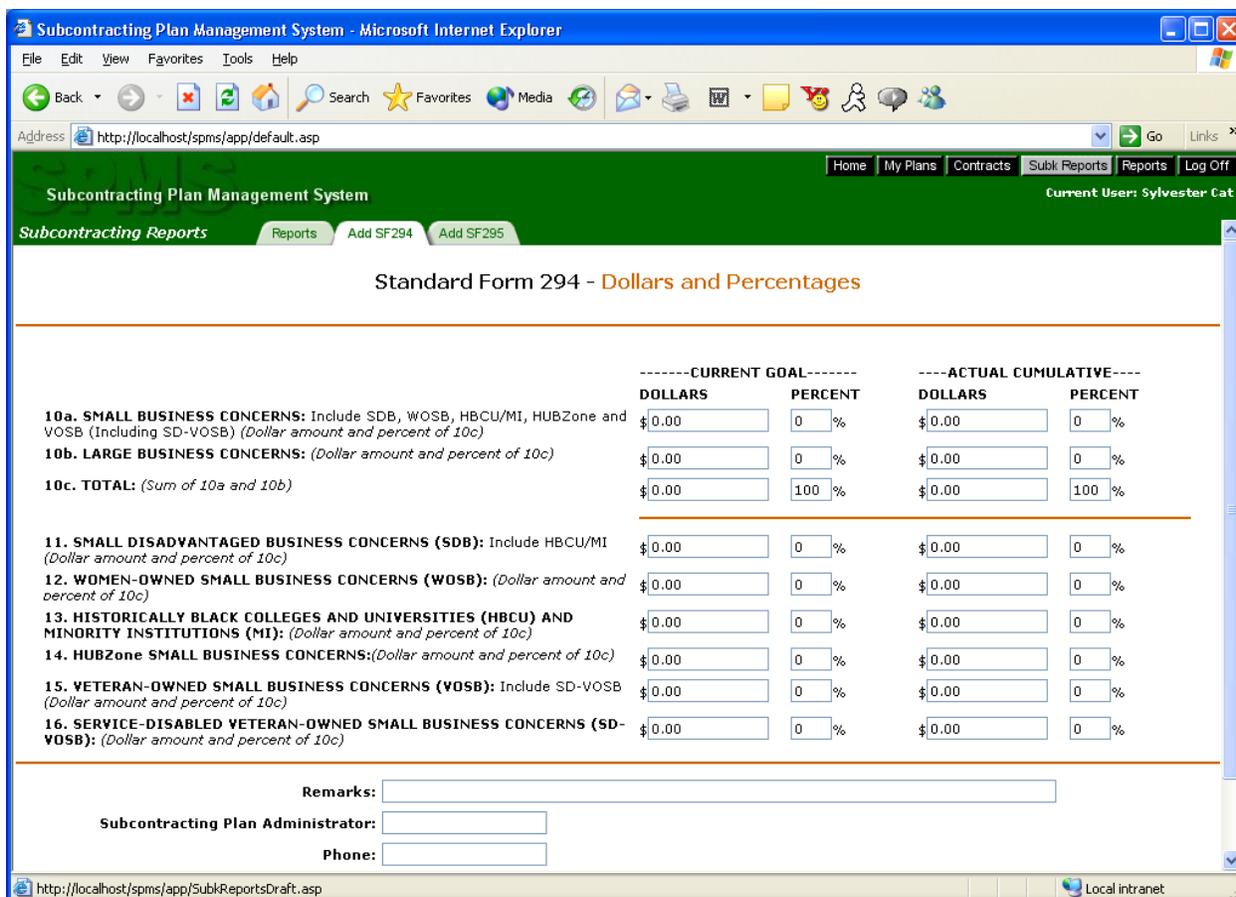


Figure 10: The second screen to input a SF 294 subcontracting report.

8.3 Uploading a Subcontracting Report

SPMS allows you to upload electronic copies of subcontracting reports into the system so that they can be viewed at later date. Before uploading a contract, you will need to convert it to an electronic file. Both types of subcontracting reports are provided in Adobe Acrobat Fillable PDF format (PDF), which is an electronic format. You should encourage contractors to use this format and email the file to you. However, if you have a paper copy of the subcontracting report, scan it in using a scanner and save the file to your computer. SPMS accepts all file formats. To upload the file, use the 'Upload' action icon (📁). SPMS will direct you to an upload screen where you must browse to the file location on your computer and click 'Ok'. After the file has been uploaded, you will be returned to the Subcontracting Reports list. You can verify the subcontracting report was successfully uploaded by clicking the 'View' action icon (👁) to the right of the subcontracting report.

8.4 Viewing a Subcontracting Report

Once an electronic copy of a subcontracting has been uploaded to SPMS, you can view it at any time. To view the subcontracting report, locate it in the list and click 'View' action icon () to the right of the subcontracting report.

9 Reports

The 'Reports' functional group () allows you to view all the reports that you are authorized for. The functions include:

- Incorporated
- DCMA
- Unknown
- All Plans
- DCMA 640s
- 640 Submittals
- Reviews
- Subk Reports
- Pending Reviews

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

9.1 Incorporated Subcontracting Plans Report

To view the Incorporated Subcontracting Plans Report, use the 'Incorporated' function. This report displays a list of all subcontracting plans that are incorporated into an active DESC contract. The complete plan details are accessible from the report. This allows you to locate and view all the subcontracting plans that are currently in effect. Plans that have expired or were never approved are not displayed. To view a plan, located the plan in the list and click the 'View' action icon to the right.

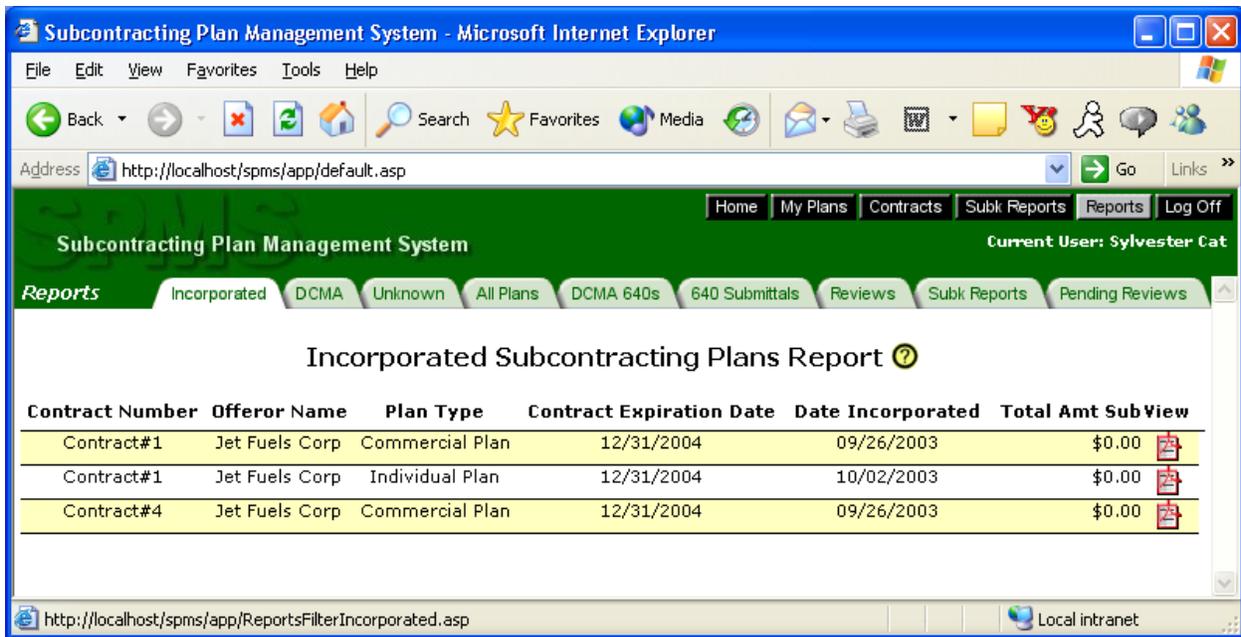


Figure 11: The 'Incorporated Subcontracting Plans' Report shows all the plans that are currently in effect.

9.2 DCMA Report

To view the DCMA Report, use the 'DCMA' function. This report displays all subcontracting plans that have been incorporated into a contract that is within 60 days of expiration. This allows you to monitor contracts that will soon be ready for the final contract review.



Figure 12: The 'DCMA' report confirms that there are no contracts ready to expire.

9.3 Unknown Status Report

To view the Unknown Status Report, use the 'Unknown' function. This report allows you to quickly locate subcontracting plans that are in immediate need of Contracting Officer attention. The report displays all plans that have been approved but are still awaiting action by the Contracting Officer for over 30 days. If a plan appears on this report, it means the Contracting Officer has failed to take action on the plan and immediate attention is required. The Contracting Officer must either incorporate or close the plan out.

The report displays the offeror name, plan type, amount subcontracted, the date reviewed by the Small Business Specialist, and whether or not the Small Business Specialist concurred with the plan.

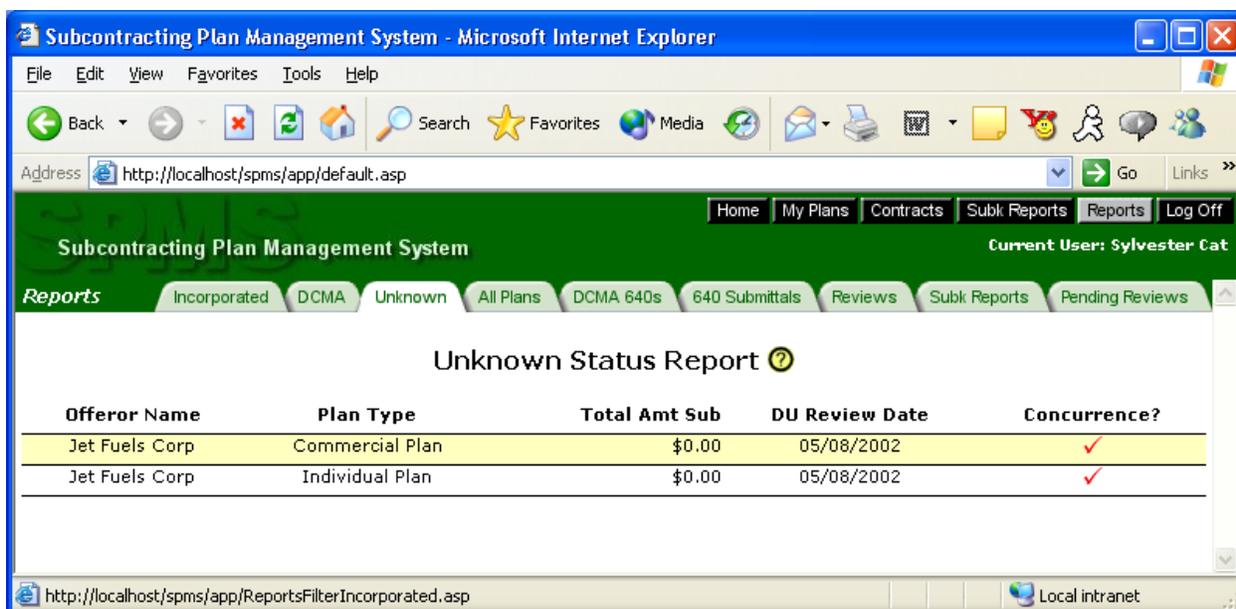


Figure 13: The 'Unknown Status' report shows plans that have been waiting too long for Contracting Officer approval.

9.4 All Plans Report

To view the All Plans Report, use the 'All Plans' function. This report allows you to search for and view any subcontracting plan within the system in any stage of review. You can use this report to monitor the progress of plans as they proceed through the approval process. You may search on Contract Number, Offeror Name, Plan Type, Plan Status and Plan Dates.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a contract number of 'C' will bring up all contracts beginning with C. To search on the date fields, you can input a 'from' date, a 'to' date, or just one of them. For example, a 'Plan Date from' of '1/1/2001' when the 'to' date is blank will bring up all plans dated after 1/1/2001. Once you enter the information, click

on 'OK' to generate the report or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

After the report is generated, you can view the plan by clicking the View icon to the right of the plan.

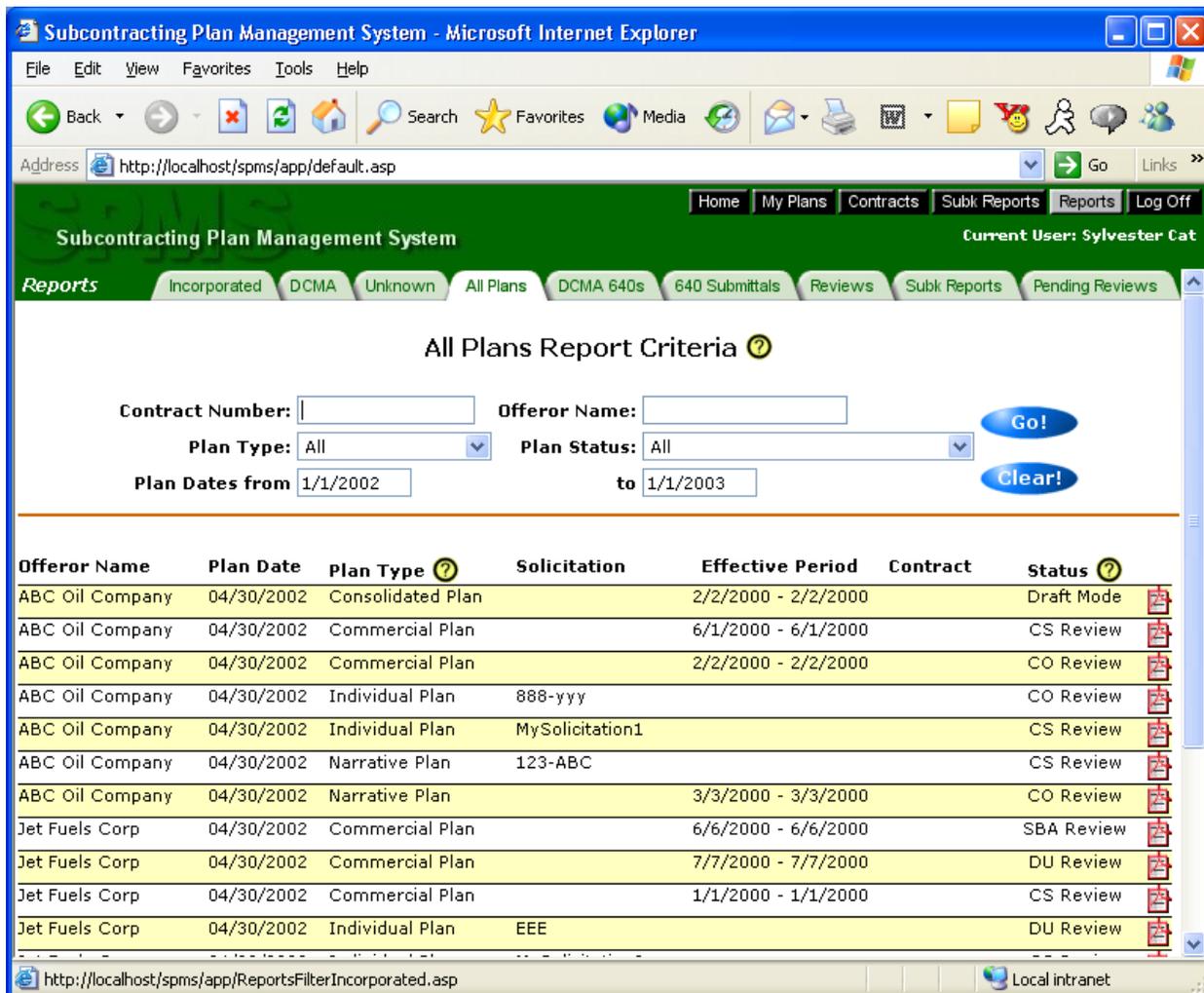


Figure 14: The 'All Plans' report after searching for plans within a date range.

9.5 DCMA 640 Forms Report

To view the DCMA 640 Forms Report, use the 'DCMA 640s' function. This report allows you to search for and view DCMA 640 forms that have been uploaded into the system. You may search on Contract Number or Offeror Name.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a contract number of 'C' will bring up all contracts beginning with C. Once you enter the information, click on 'OK' to generate the report

or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

After the report is generated, you can view the DCMA 640 form by clicking the View icon to the right of the contract. If there are no DCMA 640 forms that have been uploaded for a contract, then no icons will appear next to that contract.

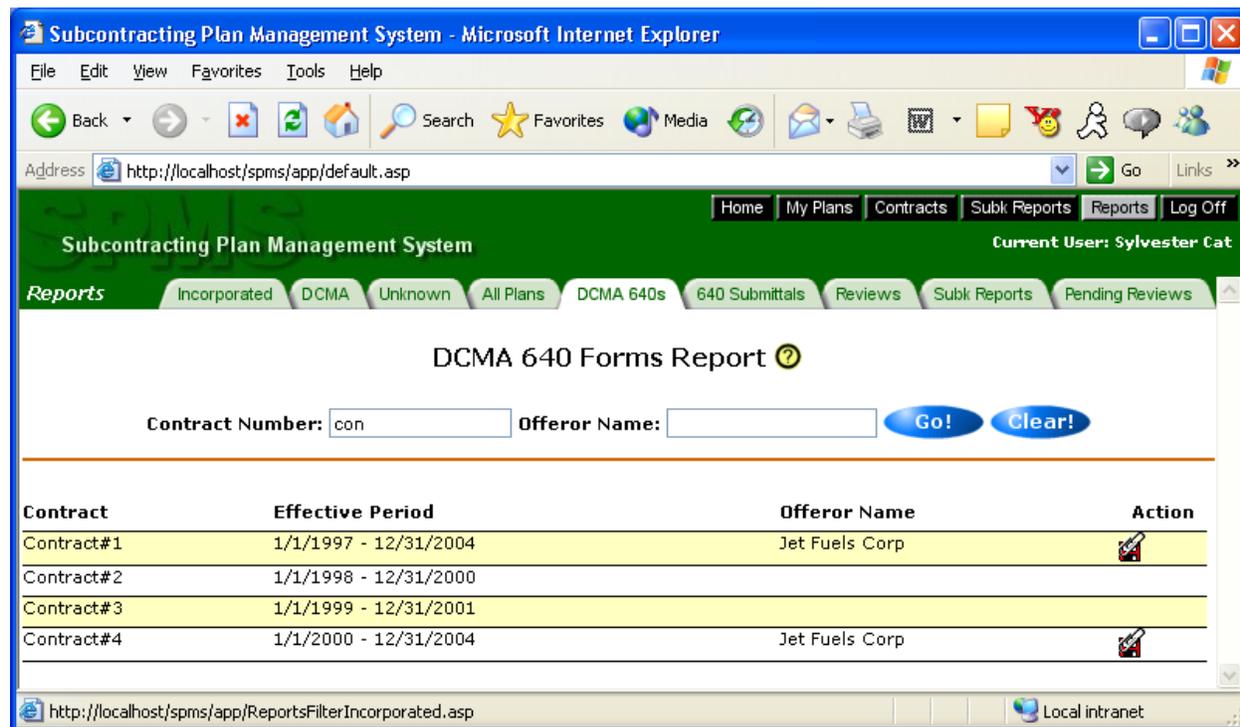


Figure 15: The 'DCMA 640 Forms Report' after searching for contracts.

9.6 DCMA 640 Submittals Report

To view the DCMA 640 Submittals Report, use the '640 Submittals' function. This report allows you to monitor DCMA 640 and 640a form submissions. DCMA is requested to submit 640 and/or 640a forms to DESC within 60 days of contract expiration. The report displays the contract number, DCMA office, DCMA email and an indicator of whether or not the forms were submitted. You may search on Contract Number, Offeror Name, or Contract Expiration Dates.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a contract number of 'C' will bring up all contracts beginning with C. To search on the date fields, you can input a 'from' date, a 'to' date, or just one of them. For example, an 'Expiration Date from' of '1/1/2001' when the 'to' date is blank will bring up all contracts that expire after 1/1/2001. Once you enter the information, click on 'OK' to generate the report or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

9.7 Completed Contract Reviews Report

To view the Completed Contract Reviews Report, use the 'Reviews' function. This report allows you to search for and view contract reviews that have been completed. You may search on Contract Number, Offeror Name, or Review Dates.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a contract number of 'C' will bring up all contracts beginning with C. To search on the date fields, you can input a 'from' date, a 'to' date, or just one of them. For example, a 'Review Date from' of '1/1/2001' when the 'to' date is blank will bring up all contract reviews after 1/1/2001. Once you enter the information, click on 'OK' to generate the report or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

After the report is generated, you can view the contract review form by clicking the View icon to the right of the contract. If there are no forms that have been uploaded for a contract, then no icons will appear next to that contract.

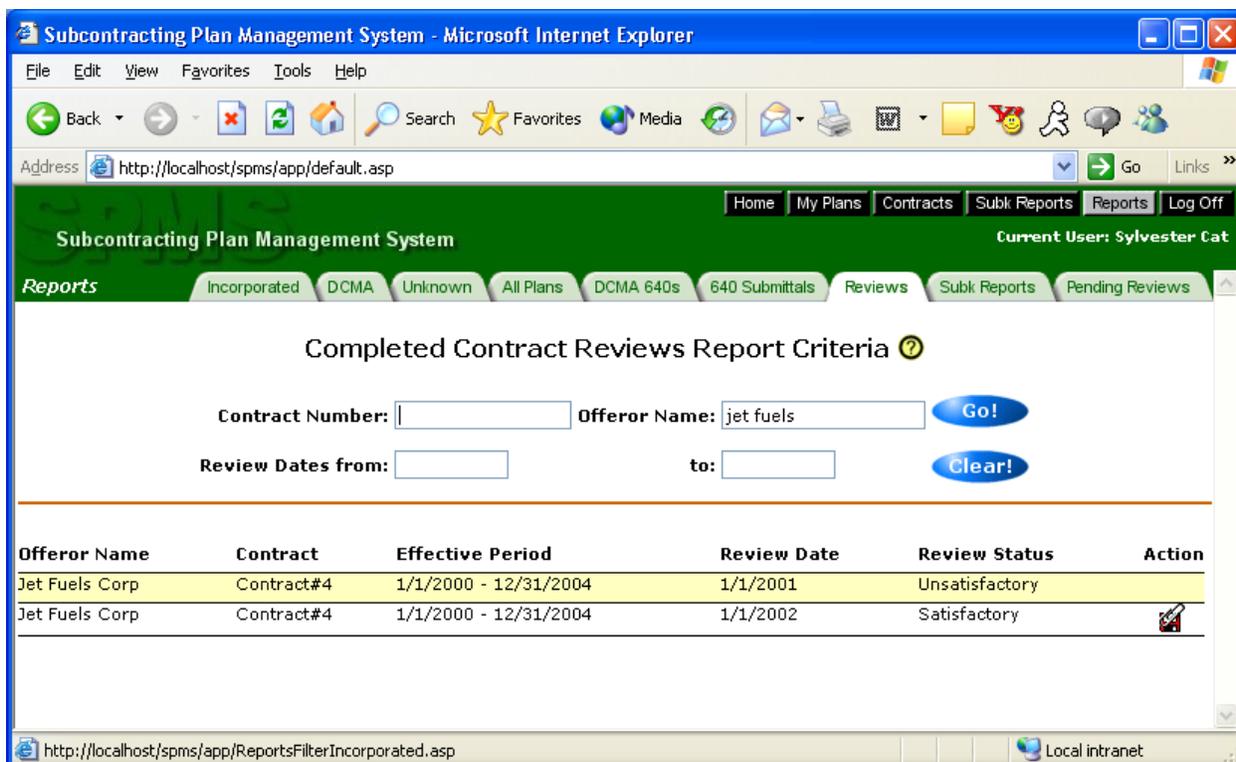


Figure 16: The 'Completed Contract Reviews' report after searching for an offeror.

9.8 Subcontracting Reports Report

To view the Completed Contract Reviews Report, use the 'Reviews' function. This report allows you to search for and view any subcontracting report in the system (SF

294 or SF 295). You may search on Company Name, Report Type, Contract Number, or Reporting Year. You may only search on Contract Number when the "SF 294" option is selected.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a company name of 'C' will bring up all companies beginning with C. To search on the Reporting Year fields, you can input a 'from' year, a 'to' year, or just one of them. For example, a 'Reporting Year from' of '1999' when the 'to' year is blank will bring up all forms dated from 1999 or later. Once you enter the information, click on 'OK' to generate the report or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

After the report is generated, you can view the subcontracting report form by clicking the View icon to the right of the company. If there are no forms that have been uploaded for a company, then no icons will appear next to that company.

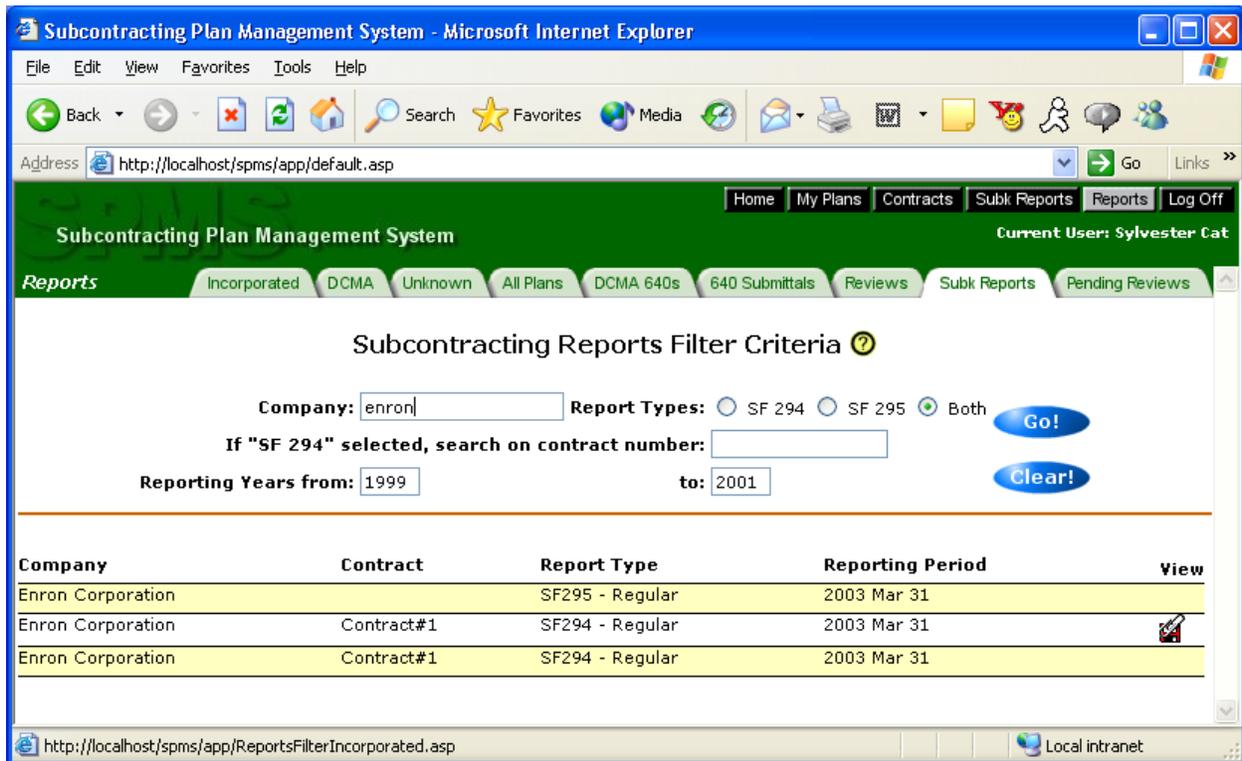


Figure 17: The 'Subcontracting Reports' report after performing a search.

9.9 Pending Contract Reviews Report

To view the Pending Contract Reviews Report, use the 'Pending Reviews' function. This report displays all contract reviews that are pending within the next 30 days. You can view the contract by clicking the View icon to the right of the contract. If an

electronic copy of the contract has not been uploaded, then no icons will appear next to that contract.



Figure 18: The 'Pending Reviews' report identifies one pending contract review.

10 Log Off

If you desire to end your SPMS session, you may do so by clicking the 'Log Off' button (**Log Off**). If you click 'Log Off', SPMS will display a reminder for you to close your browser to ensure completion of the log off process. Click the 'OK' button to continue the log off process.