DSM – Respond to a Deliverable & Communication

Reference Guide

Homepage

DSM

Search

Deliverable & Communication

Table of Contents

| Roles with Response Access |
|---|
| How to – Respond to a Deliverable & Communication |
| How to Access:1 |
| Response – Deliverable & Communication Search |
| How to - Searching for the Delivery & Communications |
| DSM Search Criteria: 1 |
| Deliverables & Communications Specific Search Fields: 2 |
| Search Results |
| Deliverable & Communication Search Results Columns: |
| Deliverable & Communication Document Information |
| D&C Response Tabs: 4 |
| Header Information: |
| Communication Tab |
| Communication Tab Information |
| Communication fields: |
| Communication Information: |
| Response Tab9 |
| Response Tab9 |
| New Message – Response Section: 9 |

| New Message – Attachments Section: | 0 |
|---|---|
| Attachments for DSM Deliverable & Communication | 0 |
| Original Communication | 1 |
| Deliverables / Reports / Attachments Tab | 1 |
| Deliverables/Reports/Attachments | 1 |
| File Table Columns:1 | 1 |
| Send Response | 2 |
| Send Success | 2 |
| What Happens Next? | |
| Resolving a Deliverable & Communication | 3 |
| Additional Information | 3 |

This guide demonstrates how to respond to Deliverable & Communication within the DSM module as an Admin Office, Issuing/Pay Office, or WAWF Vendor via a Response form for the exchange of Communication between Agencies, Customers, and Vendors. This guide also includes information on how to resolve the Deliverable & Communication.

Roles with Response Access

The role(s) required to **Respond to a Deliverable & Communication** document submitted for response by another DSM user in the Delivery Schedule Manager (DSM) application:

- DSM Admin Office
- DSM Issuing/Pay Office
- DSM WAWF Vendor
- DSM Vendor

How to – Respond to a Deliverable & Communication

How to Access:

- 1. Log into PIEE and access DSM.
- 2. Select Search from the navigation bar.
- 3. Select Deliverables & Communications from the Document Type options.
- 4. Select a Deliverable & Communication from the results.

How to - Searching for the Delivery & Communications

Use the **Search** page to find an active Delivery & Communication to respond to in DSM.

Select **Search** from the navigation panel on the left-hand side of the screen. The DSM Search page displays, select the **Deliverables & Communications** option within the Document Type section.

Response – Deliverable & Communication Search

DSM Search Criteria:

- Document Type (options: Customer Request / Delay Notice / Deliverables & Communications / Award Specific View (ASV)) (checkbox. Displays for government registered users)
- Document Active/Archive (options: Active Documents / Archived Documents) (checkbox)
- CAGE Code (with parameters: Starts With / Equal to / Is Null / Not Null)
- Contractor Name (with parameters: Starts With / Equal to / Is Null / Not Null)
- Contract Number (with parameters: Starts With / Equal to / Is Null / Not Null)
- Order Number (with parameters: Starts With / Equal to / Is Null / Not Null)
- Date Sent (Start) (with parameters: Greater than or equal to / Greater than / Equal to / Less than or equal to / Less than / Is Null / Not Null)
- Date Sent (End) (with parameters: Less than or equal to / Less than / Equal to)
- Latest Communication (Start) (with parameters: Greater than or equal to / Greater than / Equal to / Less than or equal to / Less than / Is Null / Not Null)
- Latest Communication (End) (with parameters: Less than or equal to / Less than / Equal)
- Admin By DoDAAC (with parameters: Starts With / Equal to / Is Null / Not Null)

Issue By DoDAAC (with parameters: Starts With / Equal to / Is Null / Not Null)

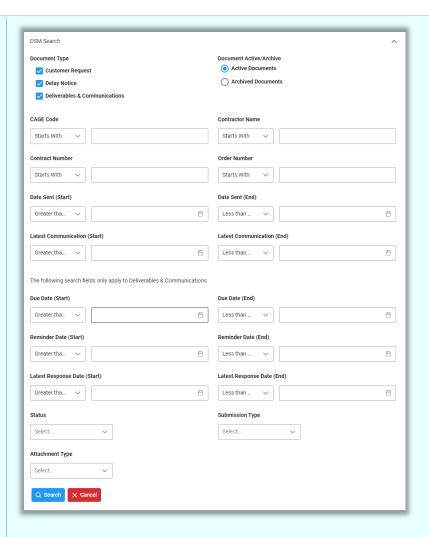
Deliverables & Communications Specific Search Fields:

- Due Date (Start) (with parameters: Greater than or equal to / Greater than / Equal to / Less than or equal to / Less than / Is Null / Not Null)
- Due Date (End) (with parameters: Less than or equal to / Less than / Equal to)
- Reminder Date (Start) (with parameters: Greater than or equal to / Greater than / Equal to / Less than or equal to / Less than / Is Null / Not Null)
- Reminder Date (End) (with parameters: Less than or equal to / Less than / Equal to)
- Latest Response Date (Start) (with parameters: Greater than or equal to / Greater than / Equal to / Less than or equal to / Less than / Is Null / Not Null)
- Latest Response Date (End) (with parameters: Less than or equal to / Less than / Equal to)
- Status (options: Resolved / Sent / Unsent, Saved Draft / Unread)
- Submission Type (options: Communication / Deliverables/Reports/Attachments / Request Award Change(s) / Request Final Report(s) / Request Interim
 Report(s))
- Attachment Type (options: Assignment & Release / Cost / Other Attachment / Other Deliverable / Patent / Patent Disclosure / Performance/equipment /
 Property / Request No Funds/Cost Extension / Request PI Change / Request Rebudget / Security / Subcontract / Technical)

Buttons:

- Search
- Cancel

NOTE: At least one document type selection is required to perform a search.



After entering the search criteria, click the **Search** button.

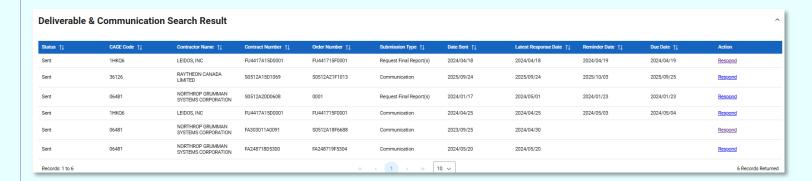
Search Results

The search results display in a table below; new searches are performed without leaving the page.

Deliverable & Communication Search Results Columns:

- Status
- CAGE Code
- Contractor Name

- Contract Number
- Order Number
- Submission Type
- Date Sent
- Latest Response Date
- Reminder Date
- Due Date
- Action (options: Respond / Open)



From the search results, click the **Respond** button for the Deliverable & Communication.

The **Deliverable & Communication** Edit screen displays; and information for the **Deliverable & Communication** is entered on the tabs below.

D&C Response Tabs:

- Communication
- Response

Deliverable &

Communication

Document

Information

• Deliverables/Reports/Attachments

The **Deliverable & Communication** pre-populated document information is available at the top of the creation screen and is visible on all tabs.

Header Information:

- Award Number
- Order Number
- Admin By
- Issue By
- CAGE

Buttons:

- Back
- Send (button sends the updated Delivery & Communication to the next person in the workflow)
- Resolve (button is available when all communication for the Delivery & Communication is complete)

NOTE: The Save button is available during creation/response of the Deliverable & Communication workflow process. The button saves all information currently input. Take note of the Contract/Order Number at the top of the page; this number is used to locate the saved document via the DSM Deliverable & Communication Search page. Refer to the Save training available on the DSM WBT under General Functions link for more details.

Communication Tab Information

Deliverable & Communication information in the fields listed below in their respective sections are read-only during Response.

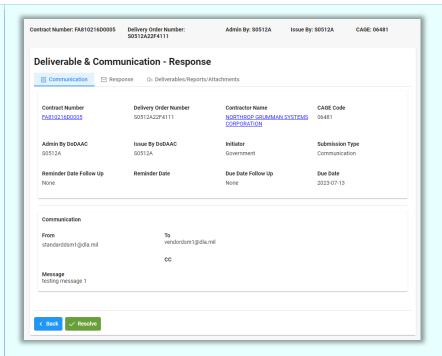
Communication fields:

- Award Number (hyperlink to a contract information popup)
- Order Number
- Contractor Name (hyperlink to a contractor information popul)
- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Initiator
- Submission Type
- Follow Up Reminder Date (displays if government registered user initiated)
- Reminder Date (displays if government registered user initiated)
- Due Date Follow Up (displays if government registered user initiated)
- Due Date (displays if government registered user initiated)

Communication Information:

- From
- To
- CC
- Message

Communication Tab



Buttons:

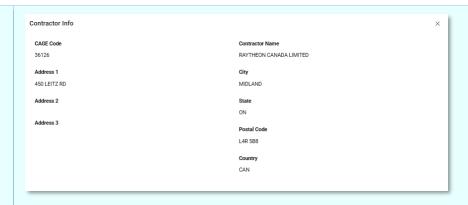
- Back
- Send (button sends the updated Delivery & Communication to the next person in the workflow)
- Resolve (button is available when all communication for the Delivery & Communication is complete)

Contract Information Popup

The Contractor field is a hyperlink to a popup that displays Contractor information.

Contractor Information Popup Fields:

- CAGE Code
- Address 1
- Address 1
- Address 3
- Contractor Name
- City
- State
- Postal Code
- Country



Contractor Information Popup

The Award Number is a hyperlink to a popup that displays Contract information.

Contract Information Popup Fields:

- Contract
 - Contract Number
 - Delivery Order Number
 - Contractor
 - Administered By
 - Final Delivery Date
 - Payment Office
 - Kind of Contract
 - Inspection
 - o Remittance Address
 - USD Total Contract Amount
 - USD Obligated Amount
 - o USD ULO Amount
 - o ACO
 - DMS Rating
 - Facility Code
 - Type of Contract
 - Acceptance
 - Discount 1
 - o Discount 2
 - Foreign Total Contract Amount
 - Foreign Obligated Amount
 - Foreign ULO Amount
 - o Currency Indicator
 - Effective Date
 - MOCAS Section
 - MOCAS Part
 - o Production Surveillance Code
 - Criticality Designator
 - R9 Remarks

- ACRN(s)
- Special Provisions
- Line Item(s)
 - o CLIN
 - o Noun
 - Order Quantity
 - Purchase Unit
 - USD Unit Price
 - o Foreign Unit Price
 - USD Total Line Item Amount
 - Foreign Total Item Amount
- Schedule(s)
 - CLIN
 - NSN
 - Ship To
 - Mark For
 - Scheduled Quantity
 - Delivery Date
- Contract MOD(s)
 - Date
 - Contract MOD
 - Mod Type
 - Obligated Amount Change
 - Cumulative Obligated Amount
- Remarks/Closeout Info
 - o ACO Remarks
 - Closeout Dates
- Shipments
 - o CLIN
 - o Shipment Number
 - Shipment Date
 - Shipment Qty
 - Mark For
 - o ACO
 - o Scheduled Qty
 - Milstrip Number



The Response tab allows for communications between sender and receiver and provides a conversation history.

Response Tab

Buttons:

Respond



Response Tab

New Message – Response Section:

- From (field is auto-populated with the users email and is not editable)
- To (field pre-populates with email addresses from the original communication) (Add Email button is available and displays a popup with a list of applicable email addresses to choose from)
- CC (Add Email button is available and displays a popup with a list of applicable email addresses to choose from)
- Message*



New Message – Attachments Section:

NOTE: Delivery Schedule Manager (DSM) users ensures that Deliverable & Communication actions entered and/or uploaded are following applicable security protocols and are handled in accordance with information Security requirements including those for classified materials, Controlled Unclassified Information (CUI), proprietary information, and Personally Identifiable Information (PII). This also includes all modifications, delivery orders, and associated attachments.

Attachments for DSM Deliverable & Communication
Select 'Choose' to select one or more documents to upload to the server.

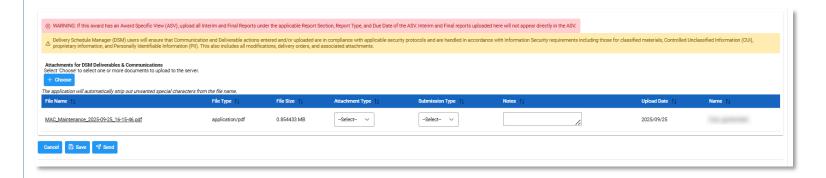
Buttons:

Choose (selecting the button displays the local file explorer)

NOTE: The application automatically strips out unwanted special characters from the file name.

Attached File Columns:

- File Name
- File Type
- File Size (MB)
- Attachment Type (options: Assignment & Release / Cost / Other Attachment / Other Deliverable / Patent / Patent Disclosure / Performance/Equipment /
 Property / Request No Funds/Cost Extension / Request Rebudget / Request PI Change / Security / Subcontract / Technical)
- Submission Type (options: Communication / Final / Interim / Request)
- Notes
- Upload Date
- Name
- Action (option: Delete)



Original Communication

All original communications are available at the bottom of the Response tab screen.

Original Communication Fields:

- From
- To
- CC
- Message



Buttons:

- Back
- Send (button sends the updated Delivery & Communication to the next person in the workflow)
- Resolve (button is available when all communication for the Delivery & Communication is complete)

Deliverable & Communication information in the fields listed below in their respective sections are read-only during Response.

Deliverables / Reports / Attachments Tab

NOTE: Delivery Schedule Manager (DSM) users ensures that Deliverable & Communication actions entered and/or uploaded are following applicable security protocols and are handled in accordance with information Security requirements including those for classified materials, Controlled Unclassified Information (CUI), proprietary information, and Personally Identifiable Information (PII). This also includes all modifications, delivery orders, and associated attachments.

Deliverables/Reports/Attachments

File Table Columns:

- File Name (hyperlink downloads file)
- File Type
- File Size (MB)
- Attachment Type
- Submission Type

Notes **Upload Date** Name Action (option: Delete) NOTE: Attachments are deleted from this tab by the uploader. **Deliverable & Communication - Response** ® WARNING: If this award has an Award Specific View (ASV), upload all Interim and Final Reports under the applicable Report Section, Report Type, and Due Date of the ASV. Interim and Final reports uploaded here will not appear directly in the ASV. 13267Notes_2024-05-03_16-48-58.docx application/vnd.openxmlformats-officedocument wordprocessingml.document 0.011872 MB Interim 2024/05/03 **Buttons:** Back Send (button sends the updated Delivery & Communication to the next person in the workflow) Resolve (button is available when all communication for the Delivery & Communication is complete) After the information is input on the Response tab, the document's response is ready to send. Click the Send button to continue the workflow **Send Response** process. Document validation runs displaying soft warnings/errors; make necessary corrections before sending. Successfully Sending a Delivery & Communications Response a success message displays and the response is editable. The document is in **Send Success** the 'Sent' status and assigned to the selected DSM users. An email is sent to the users associated with the document, informing them the document has been responded to. A success message appears stating, "Send Success: Message was sent" The document is sent to the receivers indicated on the document and is ready for their response. The document is still editable for the initiator **What Happens** and the responses are also editable by the initiators. For more information on locating a Sent Delivery & Communications document review the Next? Search training on the WBT for DSM documents under General Information.

After all communication is satisfied and the Delivery & Communication is resolved by the government User. Open the Delivery & Communication and click the **Resolved** button to finish the workflow for the D&C document. Clicking the **Resolve** button displays a confirmation window asking the user to confirm they would like to close the Deliverable & Communication. Click the **Yes** button to continue.

Resolving a Deliverable & Communication

Responses are no longer accepted, and the Deliverable & Communication is locked down.

Both Issuing/Pay Office and Admin Offices may close the request for their registered DoDAAC, it does not have to be the initiator. After resolving, the document is placed in archive status after 15 calendar days.

NOTE: If the document is currently being edited by someone, a warning displays indicating it is currently being edited and therefore, is not Resolvable. Please wait for them to finish before resolving.

Additional Information

Submission Type Allowed

Allowable Attachment Type and Submission Type Selections:

Interim Final

Interim

Final

Final

Interim Final

Request

Interim Final

Final Technical Interim Final Property Interim Final Subcontract Interim Final Security Interim Final

Attachment Type

Performance/Equipment

Assignment & Release

Request No Funds/Cost

Patent Disclosure

Extension

Cost

Patent

Additional Information

| Request Rebudget | Request |
|-------------------|------------------|
| Request PI Change | Request |
| Other Deliverable | Interim Final |
| Other Attachment | Communication |

Notes Pre-Pop based on Attachment Type and Submission Type Selection:

| Attachment Type | Submission Types | Notes Pre-Pop |
|---------------------------------|------------------|-------------------------------|
| Subcontract | Interim | Interim Subcontract |
| Security | Interim | Interim Security |
| Performance/Equipment | Interim | Interim Performance/Equipment |
| Request No Funds/Cost Extension | Request | No Funds/Cost Extension |
| Patent Disclosure | Final | Patent Disclosure |
| Request PI Change | Request | PI Change |
| Other Attachment | Communication | |
| Other Deliverable | Interim | Interim |
| Other Deliverable | Final | Final |

NOTE: The pre-pop information is not removable.