

Creating Delay Notices

Reference Guide

Homepage

DSM Homepage

Create Delay Notice

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Overview	This guide provides an overview of how to create a Delay Notice.
Role Access	<p>DSM roles with the capability to create Delay Notices:</p> <ul style="list-style-type: none">• DSM Admin Office<ul style="list-style-type: none">◦ Admin Offices with a registered DoDAAC that matches the Admin By DoDAAC in EDA for the Contract selected will be able to create a Delay Notice.
Create Delay Notice Search	<p>In the navigation pane, selecting Create Delay Notice in the Favorites menu will display the Create Delay Notice page.</p> <ol style="list-style-type: none">1. Enter data in the desired fields.2. When entering data into form fields, select the appropriate search modifier for each field. They are defined as follows:<ol style="list-style-type: none">a. Starts With: The data entered in the field will return results that begin with the entered characters.b. Equal To: The data entered in the field will return results that are equal to the entered characters.c. Is Null: The data search will return only results that have no value for the search criterion.d. Not Null: The data search will return only results with a value for the search criterion.3. Select the Search button to return a list of Contracts. The results will populate below the search form.4. Select the View link in the Contract DSM History column to view all actions taken on the Delay Notice for the Contract in DSM. Customer Requests and Delay Notices associated with the Contract will be displayed on separate tabs. Details of affected CLINs and Responses may be expanded using the arrow to the left of each line. <p>Page Name: Create Delay Notice</p> <p><i>Section Name: EDA Contract Data Search</i></p> <p><i>Search Criteria:</i></p> <ul style="list-style-type: none">• Contract Number (<i>with parameters Starts With / Equal To / Is Null / Not Null</i>)• Delivery Order Number (<i>with parameters Starts With / Equal To / Is Null / Not Null</i>) <p><i>Buttons:</i></p> <ul style="list-style-type: none">• Search

Section Name: Search Results

Columns:

- Contract Number
- Delivery Order
- Contractor Name
- CAGE Code
- Admin By DoDAAC
- Issue By DoDAAC
- Contract DSM History (Hyperlink)
- Create (Button)

Clicking the History View hyperlink opens a pop-up.

Pop-up Page: History

Section Name: Contract Information

- CAGE Code
- Contract Number
- Vendor Name

Tabs:

- Customer Request
- Delay Notices
- Deliverables & Communications

Columns:

- Initiator
- Initiated
- Responses
- Last Sent
- Contract Number
- Order Number

	<p>Click the Create button in the row for the contract that a Delay Notice is being created for.</p> <p><i>Optional Pop-up Page: Confirm creation</i></p> <p>A Delay Notice exists for this contract number and/or delivery order number. Are you sure you would like to continue?</p> <p><i>Buttons:</i></p> <ul style="list-style-type: none"> • No • Yes
<p>Create</p>	<p>To begin creating a Delay Notice, select the blue Create icon in the Create column of the applicable Contract in the Create Delay Notice Search results.</p> <p>If an existing Delay Notice (including any in Draft status) exists for the Contract, the user will be prompted to confirm creation of a new Delay Notice. If confirmed, the user may continue.</p> <p>If no CLINs exist for the Contract, the user will be prompted to confirm creation of the Delay Notice. If confirmed, the user may continue.</p> <p><i>Delay Notice – Create – CLIN and Schedule Selection Page</i></p> <ol style="list-style-type: none"> 1. If the Contract has associated CLINs that meet the search criteria, they will be displayed in the CLIN Selection section. If the Contract as any mods, all CLINs across all mods will be returned. If the Contract does not have existing CLINs, skip to step 4. <ol style="list-style-type: none"> a. The Search field at the top of the CLIN Selection section may be used to filter CLIN data. 2. If CLINs are available, select the checkboxes of any CLIN(s) to be included in the Delay Notice. The user may proceed without selecting CLINs. 3. Once CLINs are selected, select the Get Schedules button to populate available Schedules for the Contract and CLIN(s).The Schedules section will be expanded. <ol style="list-style-type: none"> a. Select the EDA/PDS or MOCAS/SDW radio buttons to filter by data source. The selection will be defaulted to EDA/PDS data.

- b. If Schedules are available, select the checkboxes of any Schedules to be included in the Delay Notice. The user may proceed without selecting Schedules. Note: The Scheduled Delivery may refer to the Scheduled Delivery Date or the Service Completion Date.
4. Select the Create button to proceed with creation of the Delay Notice.

Header Information:

- Contract Number
- Delivery Order Number
- Contract Name
- CAGE Code
- Issue By DoDAAC
- Admin By DoDAAC

Section Name: CLIN Selection

Toggle Data Source Radios:

- EDA/PDS (*Default*)
- MOCAS/SDW

Columns:

- Checkbox
- CLIN
- Noun
- National Stock Number
- Part Number

Buttons:

- Get Schedules

Section Displays below after selecting **CLINs** and clicking the **Get Schedules** button.

Toggle Data Source Radios:

- EDA/PDS (*Default*)
- MOCAS/SDW

Schedules:

- Checkbox
- CLIN
- Schedule Delivery
- Ship To
- Mark For
- MILSTRIP
- Unshipped Quantity
- Prior RDF

Buttons:

- Back
- Create
- Save (Displays after selecting a CLIN)
- Delete Delay Notice (Displays after Saving)

Delay Notice – Create Page

Tabs:

- Delay Notice
- Attachments
- Contract DSM History

Delay Notice Tab Information

Fields:

- From
- To
- CC
- Root Cause
- Contractor Action
- DCMA Action
- DCMA Recommendation

Buttons:

- Add Emails

Pop-up Page: User Email Addresses

Select one or more user emails: (*drop-down with multi-select options*)

Buttons:

- Add
- Cancel

Sub-Section Name: Delay Details

- Caused By (*drop-down*)
- Delay Type (*drop-down*)
- Delay Cause (*drop-down*)
- Contract Number (*hyperlink*)
- Delivery Order Number
- Contractor Name (*hyperlink*)
- CAGE Code
- Admin By
- Issue By

Sub-Section Name: Affected Schedules

Fields:

- # Days Delayed

Buttons:

- Apply

Columns:

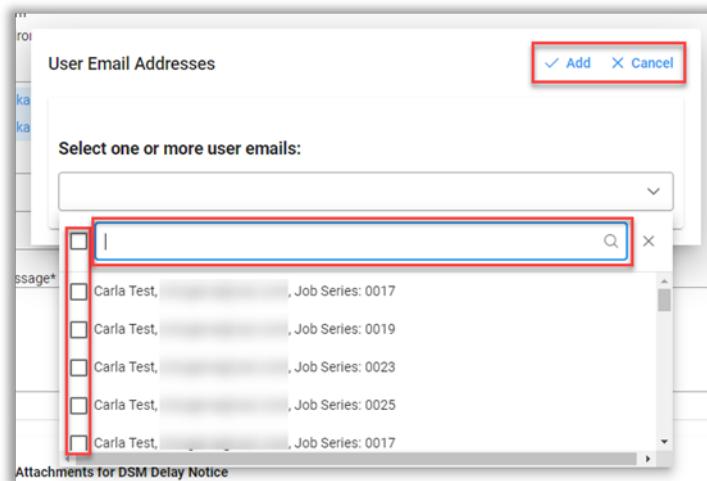
- CLIN
- Schedule
- Ship To
- Mark For
- RDF (*Date field*)
- Prior RDF
- Unshipped Quantity
- Delinquent Quantity (*Number field*)
- Days Late

Buttons:

- Cancel
- Back
- Send
- Save

Delay Notice tab

1. On the Delay Notice tab, enter one or more contacts in the To (required) and CC fields. This may be done by manual entry or by selecting the Add Email button. PIEE and non-PIEE email addresses are permitted. The initiator may not enter their own email address in the To or CC fields.



- a. Contacts may be searched using the search field in the dropdown menu.
 - i. The user may search by name or DoDAAC. Searching by DoDAAC returns a list of DSM users with the same Location Code, as well as the users' Job Series, where appropriate; users may be filtered by Job Series.
 1. DSM Issuing/Pay Office role location > Issue By
 2. DSM Admin Office role location > Admin By
 3. DSM View Only user role location > Issue By or Admin By
 - ii. Select the checkboxes next to the desired contact(s) to add them as recipients to the communication. The checkbox next to the search field will select all currently displayed contacts.
 - iii. Select the Add button to add selected contacts or select the Cancel button to close the modal without adding any contacts.

2. Enter data in the Root Cause, Contractor Action, DCMA Action, and DCMA Recommendation fields.
3. Select a value from the Caused By dropdown menu. The dropdown menu will default to Supplier.
4. Select a value from the Delay Type dropdown menu.
5. Select a value from the Delay Cause dropdown menu.
6. The user may select the Contract Name and Contractor Number to view further details of each.

Contract Number

Delivery Order Number

Contractor Name

CAGE Code

Admin By

Issue By

Contract Information

Contract 1 ACRN(s) Special Provisions 1 Line Item(s) 0 Schedule(s) Contract MOD(s) Remarks / Closeout Info

Shipments

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

- a. To view all available data on the Contract Information modal, navigate using the Contract Information tabs.
7. The Admin By and Issue By DoDAACs are prepopulated from the Contract/Order Number in EDA and allow the Delay Notice to be routed to the organizational inbox.
8. The Affected Schedules section will be populated with any Schedule(s) selected on the CLIN and Schedule Selection page as well as CLIN, Schedule Date, Ship To, Mark For, RDF (Revised Delivery Forecast), prior RDF, unshipped quantities, delinquent quantities, and days late.
 - a. If all schedules in the Affected Schedules section will be delayed by the same number of days, enter the number of days in the # Days Delayed field. The date must not be in the past. Select the Apply button.

- i. This will automatically calculate the RDF Date field value for all Schedules in the row. The user may subsequently edit this value(s).
 - 1. If Prior RDF is populated, the number of calendar days applied will be added to the Prior RDF date and the RDF Date will be populated.
 - 2. If Prior RDF is not populated, the number of calendar days applied will be added to the Schedule Date and the RDF Date will be populated.
- ii. This will populate the Delinquent Quantity for all Schedules with the current unshipped quantity. The user may subsequently edit this value(s).
- b. Enter a date in the RDF field (required). The date must not be in the past.
- c. Enter a value in the Delinquent Quantity field (required). Delinquent Quantity must not be greater than Unshipped Quantity.
- d. Days Late is calculated by Number of Days past the Schedule Date (the contractual date for delivery). This field will populate when Prior RDF is present or when the Delay Notice is sent.

Attachments Tab

- 1. In the Attachments for DSM Delay Notice section, one or more files may be attached to the Delay Notice.
 - a. Select the + Choose button to select files from the local directory for attachment to the Delay Notice. The maximum allowed file size is 100 MB. Permitted file types are: .bmp, .doc, .docx, .htm, .html, .jpg, .mpp, .mppx, .msg, .pdf, .ppt, .pptx, .rtf, .tif, .txt, .vsd, .vdx, .xls, .xlsx.
 - b. Upon upload completion, the user may add a description of the file in the Attachment Description field(s), which allows up to 100 characters. File names may contain the following characters: A-Z, a-z, 0-9, dash ('-'), underscore ('_').
 - c. To delete attached files, select the Delete icon in the Actions column.

Contract DSM History Tab

- 1. The Contract DSM History tab displays all actions taken on the Delay Notice for the Contract in DSM.

All Tabs

- 1. When all necessary data has been added to the Delay Notice, select the Send button at the bottom of the page to submit the Notice. The status will be set to Sent on the sending user's Dashboard.
 - a. Up to three business days after submission of a Delay Notice, the initiating user may return to and edit a Delay Notice that has not yet received a Response. Once the Delay Notice has been reopened, the status will be set to Unsent, Saved Draft and an

	<p>email will be sent to all recipients of the Notice notifying them that the Notice has been modified and is no longer available for viewing or response.</p> <p>b. The initiating user may return to and delete a Delay Notice that has not yet received a Response by selecting the Delete Delay button. Once deleted, the Notice will no longer be visible to the sender or recipient(s).</p> <ul style="list-style-type: none"> • The Cancel button at the bottom of the page will close the Delay Notice without saving changes and navigate the user to the Dashboard. • The Back button at the bottom of the page will navigate the user back to the previous page. • The Send button at the bottom of the page will submit the Delay Notice and return the user to the DSM Dashboard. The status of the Notice will be set to Sent on the user's Dashboard. • The Save button at the bottom of the page will save a draft of the Delay Notice. The Notice will be in Unsent, Saved Draft status (visible only to the initiator of the Notice) until submission at a later time. <ul style="list-style-type: none"> ○ Contract Number and CLIN selection (if any exist for the Contract) are required to save a draft.
Email Notifications	<p>Following creation of a Delay Notice, email notifications will be sent per the following rules:</p> <ul style="list-style-type: none"> • At the time a Delay Notice is sent or reopened and edited, the initiating user will receive an email notification confirming the creation of the Notice. • At the time a Delay Notice is sent, all contacts identified in the Customer, To, and CC fields will receive email notifications informing them of the creation of the Notice.