

Contracting Officer Representative Tracking (CORT) Tool Guidance and Instruction

- Section 1: Deployment Plan
- Section 2: DoD CORT Tool Deployment Strategy
- Section 3: DoD CORT Tool Business Rules
- Section 4: DoD CORT Tool Training

Attachment 1: DEPLOYMENT PLAN

As a minimum, Component shall address the following actions in their implementation plans:

- (1) Plans to obtain Army or Defense Knowledge Online (AKO/DKO) accounts for each user of the DoD CORT Tool and to ensure that the user's CAC cards have been registered.
- (2) Plans to train each COR, COR Supervisor, Contracting Officer and Contract Specialist in using the DoD CORT Tool.
- (3) Plans to register each Contracting Officer and Contract Specialist.
- (4) Plans to register each COR.
- (5) Process to add current CORs into the CORT Tool, if applicable,
- (6) Phased deployment schedule.
- (7) Identify all the elements in the attached excel spreadsheet (Attachment 1a and 1b).

ATTACHMENT 1a -INSTRUCTIONS

Instructions:

1. Identify the name of your agency: i.e. Department of Navy, AF, DLA etc.
2. Identify all major commands.
3. Identify all applicable subcommands
4. Identify all Contracting Offices DoDAAC.
5. Identify the name of the contracting office.
6. Identify the number of personnel, to include CORS, Supervisors & Contracting Personnel, requiring AKO/DKO account and/or verify the existence of an AKO/DKO account. Register all CACs. Indicate the date to be completed.
7. Identify the number of contracting personnel, to include Contracting Officer and Contract Specialist, that will be required to complete the "Contract Staff Registration" in the DoD COR Tracking Tool. Register the Contracting Personnel. Indicate the date registration will be completed.
8. Identify the number of CORs that require creation of a profile. Create or ensure that profile is created for all CORS. Indicate the date creation of profiles will be completed.

Attachment 2: DOD CORT TOOL DEPLOYMENT STRATEGY

A. Phase I – Deployment (2nd Q, 2011) – Pilot Testing Agencies Only

This initial phase will be limited to those agencies that participated in the pilot testing in April 2010. The pilot agencies are identified below.

- Department of the Navy – NAVSEA, NAVSUP, NAVAIR and SSP
- Department of the Air Force – Gunter and Wright Patterson
- Defense Logistics Agency (DLA)
- Missile Defense Agency (MDA)
- Defense Information System Agency (DISA)

During this phase, pilot agencies shall complete the actions identified in Attachments 2, 3 and 4 and the DPAP leads within the Program Development Directorate will complete the actions listed below:

- Establish CORT Tool Configuration Control Board
- Train each agency subject matter experts (SMEs)
- Obtain deployment plan from pilot and agencies deploying at later phases
- Establish interface between the DoD CORT Tool and the Federal Procurement Data System (FPDS) to obtain specific contract data
- Complete and post user guides and training materials
- Complete Concept of Operations (CONOPS)
- Army hosts and maintains CORT Tool in Army Environment
- Army provides overall programmatic support

B. Phase II - (4rd Q, FY 2011)

- Department of the Army
- Continue deployment at all remaining commands and subcommand of pilot agencies
- Schedule deployment at remaining DoD agencies
 - Provide training
- Identify and take corrective action on systems bug and fixes
- Initiate COR reports functionality
- Establish permanent help desk*

C. Phase III – (FY 2012)

- Department of the Army
- Continue deployment and training at all remaining DoD agencies
- Continue to identify and take corrective action on systems bug and fixes
- Transition the hosting of the tool from the Army environment to the permanent DoD hosting environment
- Combine DoD CORT and Army COR Tool

*Until permanent help desk is established, all training functions will be hosted on the DPAP website at: <http://www.acq.osd.mil/dpap/pdi/eb>.

Attachment 3: DOD CORT TOOL BUSINESS RULES

Each Component shall appoint one or more SMEs or system administrators who will have overall responsibility for the training and deployment of the DoD CORT Tool. The SME shall ensure that all users, to include COR Nominees, COR Supervisors, Contract Specialists and Contracting Officers performs the following:

1. All DoD military and government civilians users obtain an AKO/DKO account and a Common Access Card (CAC) that is registered to your account. These users should self-register for a DKO Joint User Access Account (JUA). To register for DKO
 - a. Go to <https://www.us.army.mil>.
 - b. Click on "Register for DKO (CAC Required).
 - c. Select "Create Joint Account."
 - d. Steps a through c, are not required if users have already established accounts.

The user will need to have their CAC inserted into a CAC reader to register for an account. The user will be required to enter his/her social security number (SSN) and date of birth (DOB). If SSN or DOB is not provided, AKO/DKO and Defense Manpower Data Center (DMDC) will not be able to validate credentials and no account will be issued.

2. All DoD contractor employees who have been issued CACs may self register for an AKO/DKO sponsored account. Contractors must have a DoD employee (preferably, the agency subject matter expert) with an active AKO/DKO military or civilian account serve as the sponsor. The sponsor will be responsible for approving the DoD contractor employee account for their agency. When the contractor employee registers for the sponsored account, the employee will be prompted to "Enter the AKO User Name of your sponsor." The contractor employee then enters the SME AKO/DKO username into that field. Once the contractor employee completes the sponsored account application an email will be sent to the SME's AKO/DKO email address notifying the SME that the contractor employee is requesting your permission for sponsorship. The SME will then be able to access his account and approve the registration for the contractor employee. The sponsor will also be able to approve an account if an e-mail is not received.

3. Once the AKO/DKO accounts have been created, the user must register the Command Access Card (CAC) to their AKO/DKO account. If a user has not previously registered their CAC on DKO, perform the following:

- a. Log in to DKO with your Username and Password.
- b. Once logged in, click on "My Account" at the top of the page (next to the DKO logo).

- c. Click on the "CAC/Cert Registration" option.
 - d. Click on the "Register" button.
 - e. Follow the prompts to complete the registration process. (*When prompted to enter your password, enter the password you use to log on to DKO*).
 4. This step is optional. The DKO/AKO site will provide each user with an us.army.mil account. All e-mail generated in the DoD CORT Tool will be retrieved from this account. Each user may have their e-mails forwarded to "daily" e-mail by performing the following:
 - a. Login in to AKO/DKO portal: www.us.army.mil
 - b. From the "My Account" menu at the top of the page click "Mail Preferences"
 - c. Select "Mail Options"
 - d. Click the "Forward Email" radio button
 - e. Enter the Forwarding Address Information and click "SUBMIT"
 5. If a user encounters problems with their registration, please contact the AKO/DKO helpdesk at <https://help.us.army.mil/cgi-bin/akohd.cfg/php/enduser/home.php>.
 6. Once steps one through four have been completed, the SME should ensure that all COR Nominees create a profile by completing step 7 and that all Contract Specialist and Contracting Officer complete a contracting staff registration by completing step 8.
 7. All CORs, current and prospective should establish a "Profile" by completing the following sections under "COR Profile" of the DoD CORT Tool (*See user guide located on the DPAP and/or DOD CORT Tool Website*):
 - a. COR Information
 - b. Supervisor Information
 - c. Training
- Note: CORs will need their supervisor's correct AKO/DKO name and email address. A AKO/DKO name is usually *first name.last name* or *first name.middle initial.last name*.
8. All contracting personnel (contracting officers and contract specialist) must provide the following data by completing the "Contracting Staff Registration" of the DoD CORT Tool. This registration will allow contracting officers to approve or disapprove the nomination of a COR.
 - a. Name: First, Middle (name or initial) Last
 - b. DKO Name – Name used to register in the DKO, (i.e. *john.doe, mary.smith*)
 - c. Phone Number

- d. E-mail address – enter the AKO/DKO address (*see above for forwarding e-mail*).
- e. Role - contract specialist or contracting officer. (Note: *Only those contracting personnel, registered at the contracting officer level will be able to approve COR nominations.*)
- f. Contracting Center DODAAC - Enter your organization six (6) digit organizational code
- g. Organization - Enter your organization's name.
- h. Alternate Contracting Center DODACC- If you support more than one contracting organization, please enter the organization(s) six (6) digit organizational code.
- i. Alternate Contracting Center's DODAAC Organization - Enter your organization's name.

Note: Contracting Officers and Contract Specialists may register for four Alternate Contracting Center DODAACs.

Attachment 4: DOD CORT TOOL TRAINING

Training of the users may be accomplished in many ways for maximum coverage. Experience gained from deployment of other similar system reveal that the training techniques listed below provide the most coverage and stable source of information dissemination. The documentation and forums to be used are:

1. Self-Based Training

Training and support documents will be posted on the DoD CORT Tool homepage and will be available for any user to view or print at any time. The documents available are listed below with a brief description.

a. COR User's Guide – contains information on how to utilize the COR functionality such as registration, running reports, entering report data. This document is used to provide assistance when navigating within the CORT Tool.

b. PowerPoint Presentation – contains screen shots of various pages within the DoD CORT Tool that provide detailed fill-in instruction.

c. Frequently Asked Questions (FAQ) – is currently being developed and will be posted on the website. It will contain a lists the questions most commonly asked by the users.

2. Live Training – (For train-the-trainers and Agency Subject Matter Experts/Administrators) – 1 hour

To train all users, the “train-the-trainer” approach will be employed. A DoD representative will provide training to each agency SMEs. The Service SMEs will serve as a liaison to DoD for that agency and shall have overall responsibility for coordinating agency training. DoD will be able to provide the two types of live training.

a. “In Person” Training – A detailed overview of the site to a small group, including policy requirement and live demonstration or screen shots, to show the user what the system looks like as well as available functionality.

b. Remote Training via teleconference, video teleconference or phone – An overview, detailed discussion and demonstration provided via webinar. Training is provided on a first come first serve basis, and registration is required.