

LETTER OF INTENT GENERATION BOT

User Guide

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1. PURPOSE OF THIS USER GUIDE

This User Guide is designed for Contracting Officers (CO's), Contracting Specialists (CS's) and other procurement professionals who will be using the Letter of Intent Generation bot. This document provides:

1. An abbreviated description of the technology that enables the bot to perform, known as Robotics Process Automation (RPA)
2. A brief overview of the business process with reference to more detailed process documents, policies or guidance
3. A step-by-step guide for how to interact with the bot
4. Troubleshooting support and contact information for technical support

2. INTRODUCTION TO ROBOTICS PROCESS AUTOMATION

Robotics Process Automation (RPA) is a process by which computer software, often called a “bot” or “automation,” emulates and integrates the actions of a human interacting within digital systems to execute a business process. RPA automations utilize the user interface to capture data and manipulate applications just like humans do. This technology is best used to convert manual, rote, rule-based human processes into automated, software based processes.

3. ABOUT THE LETTER OF INTENT BOT

3.1. Business Process

Contracts can be extended by exercising an option in the contract within a prescribed deadline. A Letter of Intent must be sent within 60 days of the end of the contract year. This avoids the need to renegotiate the contract—a time consuming and costly process. Without this bot, there is no automated way to know when a contract is due for exercise of an option year.

Though the process to exercise an option contains many steps, the intention of this bot is to automate the process of identifying which contracts have upcoming options that need to be exercised within 90 days. Once a contract is identified as needing to exercise an option, given the contract number, the bot will then generate the Letter of Intent and return it to the CO or CS.

The bot runs in two phases:

Phase 1: Daily report of contracts due for exercise of an option within 90 days. Each morning at 8 am, an excel spreadsheet containing all of the contracts needing an option exercised within 90 days.

Reports available in SharePoint: \\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA_Prod\Exercise_options\

You should periodically check the report to see if you have any contracts that need to have an option exercised within the next 90 days.

Once you have identified a contract (or contracts) you are responsible for, you can begin the process of exercising the option.

Note: Even after you have exercised the option, the contract and your name will remain on the report until the 90 days have lapsed. You should keep track of the contracts for which you have already exercised the options and which are new additions to the list.

In order to conduct a responsibility determination for this contract, use the [Contractor Responsibility Determination bot](#), and notify the program office responsible for the contract to ensure that they are able and wish to continue with this contract. Once this is completed, continue to phase 2.

Phase 2: Once you have been notified you have a contract that requires an exercise of options, you will run the bot to generate a letter of intent (instructions below).

The bot will return a word document with a Letter of Intent written for each contract number. Download this document and save in your records. You will also create a new email with this letter as an attachment to send to the vendor.

Once the Letter of Intent is sent to the vendor, proceed to process the option in accordance with policy.

3.2. Usage

This bot is an unattended bot, meaning that it runs in the background and you will not see it doing the work. Phase 1 occurs daily, without prompting. Phase 2 requires you to start the process.

When should I use this bot?

You should run this bot for each contract you manage that has an option needing to be exercised within the next 90 day.

How do I use this bot?

This is outlined in detail in the Initiate section (5.3). At a high-level, you will use the [Bot Center](#) to submit contract numbers for the bot to process your request. You will receive a confirmation message after clicking "Run" to submit the request. Once it has processed your request, you will receive an email with an attached Letter of Intent.

What do I do with the bot results?

Phase 1: The daily report of contracts will be stored in the SharePoint drive for 1 year.

Phase 2: You are responsible for saving all Letters of Intent generated by the bot in your personal records and in AMS. The Letters of Intent will not be saved by the bot.

4. USER ACCOUNT POLICIES

For security purposes, all users of this bot must be on the approved user list managed by OCIO.



4.1. Getting Started

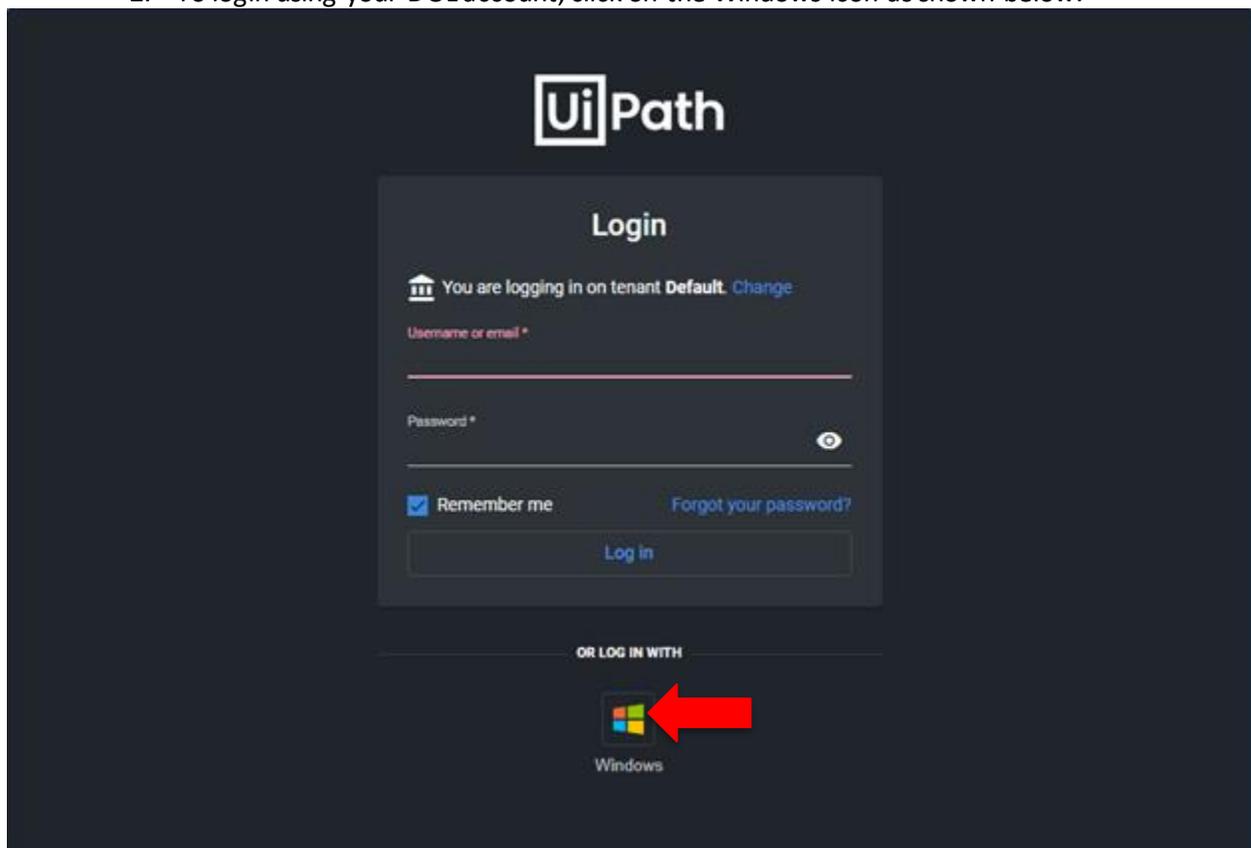
Prerequisites

- Microsoft Edge or Google Chrome Web Browser
- DOL VPN Connection
- Bot user access: email EnterpriseServiceDesk@dol.gov to request DOL RPA access and ask for the ticket to be assigned to the "RPA support" Service Now group.

Instructions

User Login (via Windows)

1. Navigate to the following URL: <https://botcenter.dol.gov/>
 - You will be redirected to the UiPath login screen.
2. To login using your DOL account, click on the Windows icon as shown below:



- If login is successful, will be redirected back to the bot center.

4.2. Login Error

If you get a login error (usually error #214), please open a ticket with [RPA Support](#). This link will open an Outlook email. **Do not** change the email recipient, subject line or prefilled body. Please add a description of your issue and send a screenshot of the error message.

5. USING THE LETTER OF INTENT BOT

5.1. 90 day Exercise of Options Report Bot (Phase 1)

This bot runs on a daily schedule and stores reports on a SharePoint Drive location:

\\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA_Prod\Exercise_options

The image below illustrates what the report will look like:

The screenshot shows a SharePoint folder view for 'Report-010121-070153' containing an Excel file 'Contract-Report-010121'. The Excel file is open in 'Compatibility Mode' and displays a report with the following data:

Award Number	Order Number	Modification Number	Document Status	Document Owner Site	DOL Agency Code	Released Date	Period of Performance Start Date	Period of Performance End Date	Total Obligated Amount	Contracting Officer	Contracting Specialist
GS03F045DA	1605DD-17-F-000005		Released	OSPE (PROGR	1650	#####	#####	#####	\$27,565.50	Charlie DeCeasa	Ricardo Ruiz
DOL-ETA-15-A-(1630DC-20-F-00 ORIG			Released	ETA/OJC (PRO	1630	#####	#####	#####	\$87,766.00	Dayle Lashley	Crystal Brown
1630DC-20-P-0C-		ORIG	Released	ETA/OJC (PRO	1630	#####	#####	#####	\$27,816.84	Crystal Brown	Deborah Campb
GS35F267DA	1645DC-17-F-000004		Released	MSHA - ARLING	1645	#####	#####	#####	\$87,088.89	Deborah Worrell	Marvin O. Ross
GS-35F-508BA	1645DC-19-F-00 P00003		Released	MSHA - BECKLE	1645	#####	#####	#####	\$109,994.79	Deborah Worrell	Jennifer K. McKe
1645BC-17-D-0C	1645BC-20-F-00 ORIG		Released	MSHA - BECKLE	1645	#####	#####	#####	\$712.00	Deborah W. Wor	Brandi M. Brinso
1645BC-17-D-0C	1645BC-20-F-00 ORIG		Released	MSHA - BECKLE	1645	#####	#####	#####	\$712.00	Deborah W. Wor	Brandi M. Brinso
GS30F021BA	1605DC-20-F-00 ORIG		Released	OPS DIVISION	1605	#####	#####	#####	\$20,319.60	Jubner Severe	Jeremy Keator
GS35F0240P	1605DC-20-F-00 ORIG		Released	OPS DIVISION	1605	#####	#####	#####	\$82,874.07	Jubner J. Severe	Jeremy Keator
GS03F0182V	1605DC-18-F-00 P00003		Released	OPS DIVISION	1638	#####	#####	#####	\$42,300.00	Jubner Severe	Christopher Cap
1605DC-18-A-0C	1605DC-18-F-00 P00001		Released	OPS DIVISION	1606	#####	#####	#####	\$671,816.13	Elvis R. Colbert	Jeremy Keator

5.2. Confirm contract with the program office

1. Navigate to the SharePoint Drive location and open the report:
\\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA_Prod\Exercise_options
2. Analyze report and run the [Contractor Responsibility Determination Bot](#) for each vendor applicable.
3. Notify specific Program Offices of potential awards set to expire and request approval to award contract.
4. If Program Office response is to award the contract for that vendor, note contract number to be awarded. If request is denied, process is complete for this vendor.

5.3. Initiate the Letter of Intent Bot (Phase 2)

1. Capture all Contract numbers to be awarded.
2. Navigate to the [Bot Center](#), and under Letter of Intent Generation, click "Run Bot":



Letter of Intent Generation

OSPE 3-5 Minutes

This is a two part process:

Phase 1: The daily report of contracts due for exercise of an option within 90 days. Each morning at 8 am, an excel spreadsheet containing all of the contracts needing an option exercised within 90 days will be created. You should periodically check the report to see if you have any contracts that need to have an option exercised within the next 90 days. Once you have identified a contract (or contracts) that you are responsible for, you can begin the process of exercising the option.

You can find the daily report at the following location:

`\\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA_Prod\Exercise_options`

Phase 2: Once you have been notified that you have a contract that requires an exercise of options, you will run the bot to generate a letter of intent. The bot will return a word document with a Letter of Intent written for each contract number provided. Download this document and save it in your records. You will also need to create a new email with this letter as an attachment to send to the vendor. Once the Letter of Intent is sent to the vendor, proceed to process the option in accordance with policy.

Note: Even after you have exercised the option, the contract and your name will remain on the report until the 90 days have lapsed. You should keep track of the contracts for which you have already exercised the options and which are new additions to the list.

When should I use this bot? +

What do I do with the results? +

[Run Bot](#) [Report a Problem](#) [User Guide](#)

3. In the pop-up Input Window, enter the contract number for which a letter of intent is needed. You may enter a single contract number, or multiple contract numbers. To add additional contract numbers, click "Add another number."

Letter of Intent Generation

Input Form

Please provide a list of contract numbers in which a letter of intent is needed. You may enter a single contract number, or multiple contract numbers. Required fields are marked with an asterisk (*).

Contract Number * ?

1234AA-21-F-12345

[Add another number](#)

4. Once all contract numbers have been entered, click the “Run” button to submit the request.

5.4. Letter of Intent Bot output

1. After clicking “Run” to submit your request, the pop-up window will show a confirmation message:

Letter of Intent Generation

✓ **Bot Request Sent!**

Your request has been sent to the bot for processing.
You may check the status of the bot by viewing your recent jobs list.

If you are not approved, you will receive a rejection email stating so. See section 4 on user accounts to be added as an approved user.

2. Be patient as your submission is processing; however, the process should complete within the next few minutes.
3. Upon completion, you will receive a confirmation email stating that your Exercise of Options Process has completed successfully.
 - a. If the bot fails to process your submission for any reason, you will receive an email stating an error has occurred with instruction to resubmit, and if the error continues to contact your Orchestrator Admin or Bot Support to determine the issue.



- b. A confirmation email including a Letter of Intent attachment will be received for each contract number submitted. Each Letter of Intent will also be saved to a SharePoint drive location.

 Tue 5/11/2021 5:52 PM
ExerciseOptions@dol.gov
Letter of Intent Process Complete

To  Haase, Lara L - OASAM OCIO INTERN

 LetterOfIntent-Contract-12556878099-0-051121.docx
107 KB

Please see attachment(s) for review. Please find the letter of intent in \\SILENTFS01.ent.dir.labor.gov\OCIO-APPS-RPA Prod\Exercise_Options\LetterofIntent The Letter is stored at V:\Exercise_Options\LetterofIntent\LetterOfIntent-Contract-12556878099-0-051121.docx

Note: It is your responsibility to keep track of all bot results and provide a record of all documentation required by this process. Using this bot does not replace human decision making. You are responsible for reviewing all bot output and making a decision about the next steps.

- 4. Review the attached letters and ensure the options/dates section of the Letter of Intent are correct.
- 5. Create a new email to the vendor with the Letter of Intent attached, exercise the option and apply the funding in AMS.

Note: DO NOT simply forward the email from the bot to the vendor with the attachment.

6. TROUBLESHOOTING AND TECHNICAL SUPPORT

6.1. Troubleshooting FAQ

Why didn't the bot process my request?

- 1. Input issues:
 - a. Do not use special characters (Examples include: *&_) or spaces when populating the template
- 2. Data Source issues:
 - a. If one of the websites the bot uses to collect data from is down, the bot will not be able to process your request.

6.2. Technical Support

If you are able to login to the Bot Center but do not see any bots, you may not be in a user group authorized to run a bot process. See Section 4.

If you experience other issues, click on "Report a Problem" at the bottom of the Letter of Intent bot dashboard (next to the "Run Bot" button, see screenshot below). This will generate an Outlook email, with the appropriate Subject line and

addressee. Do not removed the pre-populated text in the body, and add your issue description. Include a screenshot of the error you received in the email body. If the problem is that the bot never emailed you with the attachments, explain that in the email. The service desk may ask you a few questions before sending you to the OCIO RPA team.

Letter of Intent Generation

 OSPE  3-5 Minutes

This is a two part process

Phase 1: Daily report of contracts due for exercise of an option within 90 days. Each morning at 8 am, an excel spreadsheet containing all of the contracts needing an option exercised within 90 days. You should periodically check the report to see if you have any contracts that need to have an option exercised within the next 90 days. Once you have identified a contracts (or contracts) that you are responsible for, you can begin the process of exercising the option.

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When should I use this bot? +

What do I do with the results? +

[Run Bot](#) [Report a Problem](#) [User Guide](#)





Subject: Notice of Intent - Option to Extend the Term of the Contract, 2134132

To whom it may concern:

The purpose of this notice is to notify you of the Government's intent, In Accordance With (IAW) FAR Clause 52.217-9 entitled, "Option to Extend the Term of the Contract", to exercise Option Year Two (2), (8/1/2020 - 7/31/2021) under contract 2134132.

This notification DOES NOT commit the Government to exercise the pre-priced Option nor does it in any manner obligate Government funds against the subject contract.

If the Option is exercised by the Government, it will be accomplished via a unilateral modification in accordance with IAW Far Clause 52.217-9. The modification will specifically identify the Option Year of performance and contract amount.

Thank you for your interest in this requirement.