CBE BPR and Data Standardization Project
Volume I

1.0 Create the Requisition

Final Report
Version 1.2

This is a living document.
It is updated periodically as new information becomes available.

August 1, 2006 Update

Version 1.2 updates Version 1.1. Please dispose of Volume I, V1.1. Future updates will issue replacement pages for this document, Volume I, Version 1.2.

Summary of significant document changes

1. Document has been repaginated by section to allow for easier updating.

2. Data dictionary

- Screen: Requisition Administration/Administration Tab, data item "Requesting Office" usage rules have been redefined based on requirements fro standard reporting to DOC executives.

- Replaced Screen: Account Summary Detail with new screen showing "Fund" field in fifth position, not 3rd position (NIST will continue to use third position). Also reorder data item definitions to reflect new order and annotated definitions.

3. Issue Management

- Updated the following open issues

  - Additional C.Request Reporting
  - Year-end closing for 2007
  - C.Request Data Open Issues
  - Acquisition Planning Data
  - Standardized Number and Level of Approvals
  - Buy-in for Implementation Success
  - C.Request and CSTARS Electronic Approvals

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Introduction

Project Purpose

The purpose of the CBE BPR and Data Standardization Project is to bring efficiencies to the work of the Department of Commerce's procurement offices. The goal is to design common **requisition**, **contract award,** and **contract administration** processes, standardize data, and leverage new technology (C.Request, CSTARS and ORSI interfaces with CFS) to achieve significant improvements in procurement work. Design goals include:

- Optimizing resources and assets by leveraging technology
- Adapting to changing business environments
- Promoting the timely delivery of high-quality products and services
- Ensuring compliance with acquisition statutes, regulations, and policies
- Allowing bureau flexibility when guidance is not specifically provided

Success is achieved when we have a common language supported by common data definitions, deliverables, and ways of working that will allow us to communicate and work more effectively with our customers and each other.

With the adoption of streamlined processes, standard data, and technology, the procurement offices will be able to:

- Build consistency across the acquisition community
- Conduct more consistent evaluations and make higher quality decisions
- Maximize the ability to use technology
- Improve organizational effectiveness of the DOC acquisition system
- Strengthen the role of the business broker throughout the procurement process

Document Purpose

This document is the first of three volumes related to the BPR & Data Standardization project. A cross-bureau team developed these volumes during the BPR & Data Standardization workshops held April through June 2006. The three volumes are defined as:

- Volume I: Requisition process, 1.0 Create the Requisition, and C.Request data standards
- Volume II: Solicitation and Contract processes, 2.0 Award the Contract and 3.0 Administer the Contract, and CSTARS data standards (2 binders)
- Volume III: A preliminary set of data requirements that can be used as input for the evaluation of Acquisition Planning support software tools.

Additional information on C.Request can be found the Comprizon Suite user manual and end user training materials.
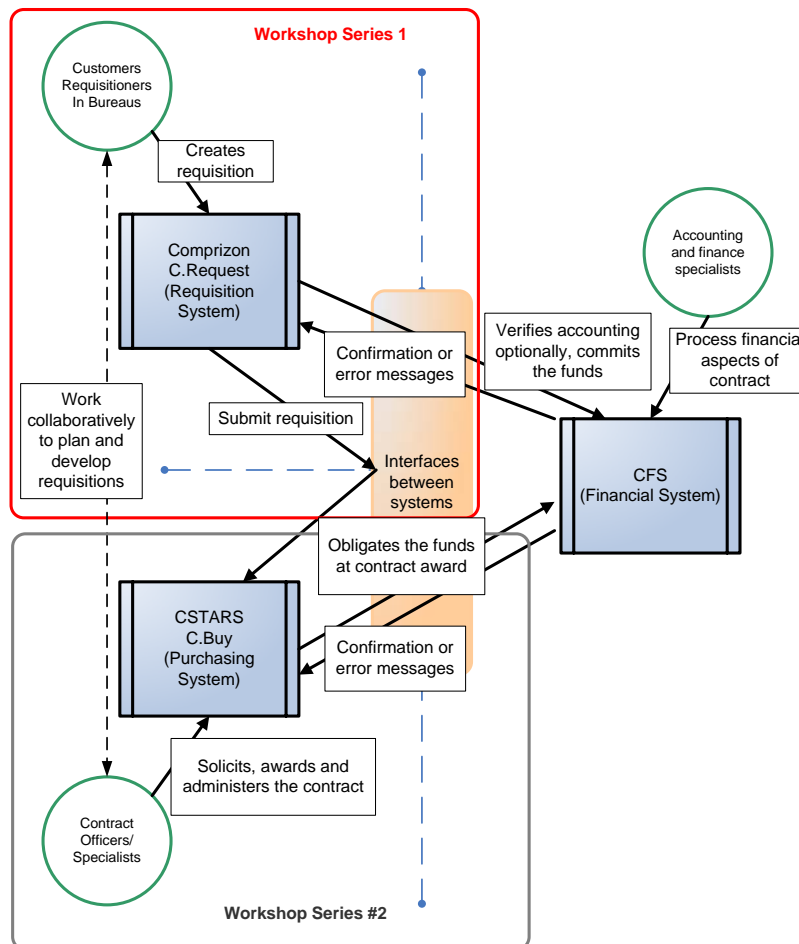
Figure 1: BPR & Data Standardization Project Scope

Participants

The team represented the four bureaus (Census, NIST, NOAA, and OS), as well as policy and system advisors. They included:

- Jerry Rorstrom-Lee, Program Manager
- Greg Coss, Co-program Manager

Commerce Acquisition Performance, Policy, and Support

- Virna Evans
- Barbara Fallat

NOAA

- John Abbott (3.0 Administer the Contract Process Owner)
- Lori Batson
- Lillian O'Dell
- Jan Dodi
- Bernadette Foreman

- Randy Hill
- Stephen Wills

Census

- Peter Sefton (2.0 Award the Contract Process Owner)

NIST

- Pat Grimes
- Debbie Turner

OS

- Dan Alexander (1.0 Create the Request Process Owner)
- Crystal Davis
- Terry O'Bryant
- Tim Kelley
- Linh Nguyen
- Frank Krempa

CACI

- Gary Hill (advisory only on system-related questions)

Methodology

The CBE BPR & Data Standardization Project used a collaborative, consensus-based approach to define common business processes and data standards. Items that cannot be agreed upon by the participants in workshops were documented as "open issues" and resolved through a well-defined issue management and escalation process.

The BPR and Data Standardization work is divided into major segments (Figure 2). Workshop series #1 covers "1.0 Create the Requisition." Workshop Series #2 covers "2.0 Award the Contract" and "3.0 Administer the Contract". In each workshop series, the following activities were completed:

- A common process design and standardized data were developed through a 1-week workshop facilitated by the contractor, RWD Technologies.

- A "Results Document" was assembled by RWD and distributed to bureau representatives within 2 weeks after the workshop.

- In the bureaus, team members took 2 to 3 weeks to review the results with bureau management and gather feedback.

- After bureau review, the team reconvened for a 2-day follow-up workshop to finalize the TO BE process design and data standards, propose performance metrics, identify TO BE vs. current operations gaps, and explore implementation best practices.

- The final "Report Document" volume was distributed within 2 weeks after the follow-up workshop.
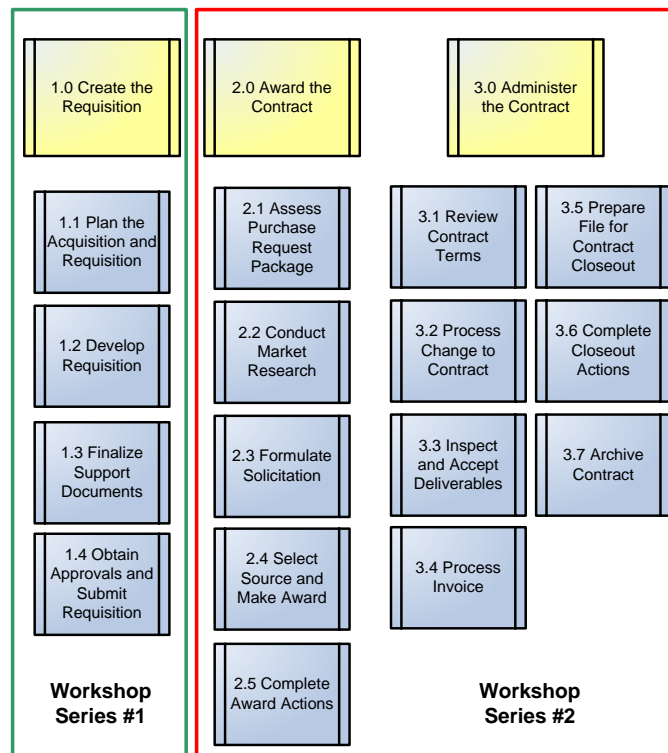
Figure 2: Workshop Series Coverage

Document Structure

Section 1: Current Situation Overview
An analysis of current procurement processes across the bureaus revealed an AS IS environment that is highly inconsistent and fraught with processing problems. Section 1 summarizes the findings. The detailed AS IS analysis is found in Appendix A.

Section 2: TO BE Processes
This section opens with a description of the key innovations of the recommended common processes for "1.0 Create the Requisition" that all bureaus should be able to implement. Special emphasis is given to the "Business Broker" role of Procurement staff throughout the procurement life cycle. The sub-processes are described in detail using process flows and narrative descriptions.

Section 3: Performance Metrics
This section documents proposed metrics to support continuous improvement efforts after go-live. To implement these metrics, reporting capabilities may need to be added to C.Request. Other data collection mechanisms, e.g., survey capabilities, are also needed. If implemented, DOC must ensure that the data can be integrated into its "Balanced Scorecard."

Section 4: GAP Analysis
This section identifies each bureau's major differences in how requisition work is done today and how it will be done using the new common processes, standardized data, and C.Request. Additionally, opportunities for improvement not specifically related to the processes were documented, along with "best practice" ideas for filling the gaps before October 16th.

Section 5: Data Dictionary
This section defines the user-affected C.Request data elements, standard values where appropriate, and usage rules. This includes data that is passed via interfaces to CFS or CSTARS. There are approximately 80 data elements organized by screen that are documented within this section.

Section 6: Issue Management
This section documents the issues raised during the requisition design and data standardization work. These issues are classified as process/policy, technical/systems, or data-related. Resolved issues are documented along with their resolutions. Outstanding issues are documented in a standard format.

Appendix A: AS IS Analysis
Appendix A contains the detailed AS IS analysis organized by bureau.

Appendix B: Additional Data Values
Appendix B contains a values list for several data elements.

Implementation Challenges

The implementation of common processes and standard data across the Department of Commerce may be somewhat enforced through the use of the new Web-based requisition system, C.Request. However, C.Request is a COTS system with a great deal of flexibility that inhibits automated enforcement. Therefore, much of the common process implementation is the responsibility of DOC and bureau management, who will need to provide supportive policies, practices, and performance management through communications, training, and on-the-job support after go-live.

To ensure a successful implementation, it is important that department-wide and bureau-specific communications, policy and practices, end user training, performance aids, and super user strategies be developed and deployed prior to go-live to ensure implementation success. Some contractor support will be available through the end of September to support these change management activities.

In the post go-live environment, there should be continual management oversight and performance support for the common processes. Team Process Owners will work cross-organizationally with bureau leadership to reinforce the continued application of standard processes. These individuals are:

- Dan Alexander (1.0 Create the Requisition)
- Peter Sefton (2.0 Award the Contract)
- John Abbott (3.0 Administer the Contract)

In the post go-live environment, these Process Owners have the responsibility to maintain cross-organization process consistency and quality by developing and implementing knowledge-sharing communities of practice around their respective processes. For example, a process owner periodically leads lessons learned meetings to develop process refinements or creates a community of practice to foster cross-bureau communications around process policies, practices, and system usage.

The more consistently the DOC procurement processing, systems, and data are applied across the bureaus, the easier it is for everyone in the Department of Commerce to support cross-serving and produce fast and effective requisition processing.

Next Steps

With the publication of this report, DOC bureau management can proceed with finalizing and delivering C.Request training. They can also prepare their organizations for Oct. 16th by revising policies and practices, clarifying job roles, completing system installation, and administrative set-ups (e.g., building user profiles), establishing a super user network, creating change advocates, and communicating changes within their organizations.

Section 1: AS IS Processes

To establish a baseline of the current requisition process, bureau representatives documented the activities used to execute the creation of a requisition. The purpose of this activity was to draw out the best practices and opportunities for improvement within each bureau. This information provided a foundation for creating the TO BE common processes for all bureaus to adopt. Current best practices were taken into the TO BE designs, while current process obstacles and bottlenecks were eliminated where possible.

Similarities and Differences

The result of the AS IS process analysis confirmed that, for the most part, bureaus follow similar steps when creating a requisition. Bureau differences are driven by bureau policies, present-day technical infrastructure, bureau cultural history, and the nature of the procurements of each bureau.

The implementation of a common IT infrastructure will go a long way to standardizing data and processes. All bureaus:

- Create requisitions
- Provide a variety of support documents (electronic and/or physical) with their requisitions
- Conduct 508 research in some form, although not consistently
- Are inconsistent in their involvement of Procurement in acquisition planning
- Follow a basic flow of process for requisitions where the process of gathering support documents can span acquisition planning and developing the requisition
- Go through some kind of funding approval before the requisition is submitted
- Have an approval process that varies based on type of requisition and/or dollar value
- Require certain requisitions to be approved by its CITRB board
- DO NOT adhere to formal "commitment accounting practices"

There were significant differences as well in current practices. Table 1 documents bureau differences in the current "1.0 Create the Requisition" process. Details of this AS IS analysis are found in Appendix A.

Table 1.1: Bureau AS IS '1.0 Create the Requisition' Differences

	Census	NIST	NOAA	OS
Bureaus use different systems and methodologies for acquisition planning. NOAA has the Acquisition Plan Acceptance System (SAM).	Manual	Manual	SAM	Manual
A majority of OS uses the Acquisition Waiver for actions over $10,000. Other bureaus do not.				✓
NOAA requires that certain types of requisitions go through property management to identify accountable property (o/c 23XX, 25XX, 26XX, 31XX).			✓	
NIST uses an interface from CSTARS to Oracle Fixed Assets for accountable property control at award.		✓		
Bureaus use CD 435 in different formats.	Electronic	Electronic	Electronic	Hard Copy
NOAA makes funding available on a quarterly basis, while other bureaus use other allocation periods.			✓	
Census sends a requisition through CBS to validate the ACCS, create a record in CFS, and carry the record through the approval chain. NIST uses a client server version of C.Request for approval routing electronically, while OS and NOAA use mail routing and hard copy approval.	Electronic	Electronic	Manual	Manual
OS requires external approval (OEB) before submissions for contracts of $100K or higher.				✓
Census has an extended approval chain that is CFS driven and enforced.	✓			
All NIST requisitions are electronically transmitted to the procurement office.		✓		
Census uses the simplified acquisition system (CSPS, part of CFS) to route requisitions electronically to procurement. However, the contract has to be re-entered into CSTARS after it is received.	✓			

Section 2: TO BE Processes

Key Design Innovations

In designing the common "1.0 Create the Requisition" process, the team leveraged best practices from the bureaus and collaborated to develop a streamlined approach. The result is process and data that effectively achieve the goals of process commonality and data standardization, while providing flexibility for bureau-specific customer needs. The team clearly defined what should be common and what can be bureau-specific. The process continues to be non-linear as shown in Figure 2.1, but is more logical in flow and integrated with C.Request than current processes.
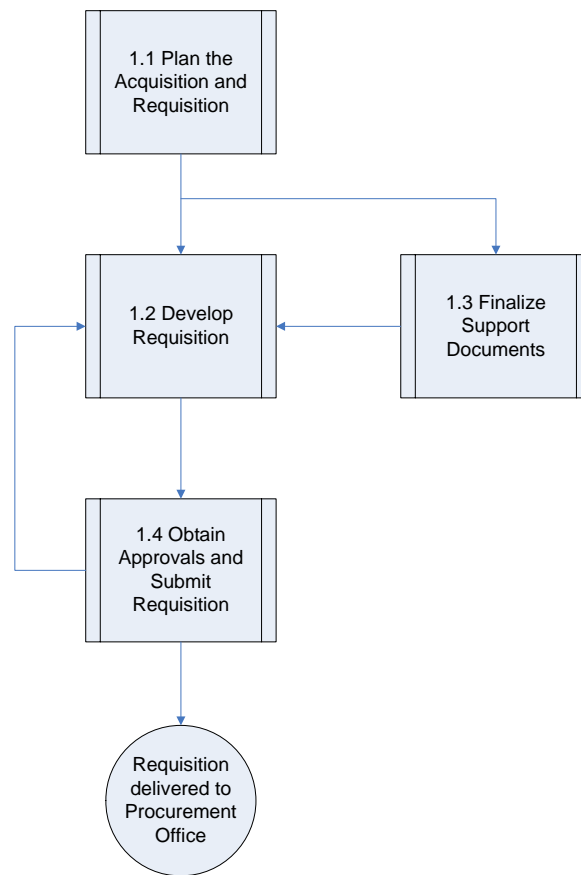

Figure 2.1: TO BE Process 1.0 Create the Requisition

The Business Broker Role and Acquisition Planning

The team put a great deal of work into the first sub-process, 1.1 Plan the Acquisition and Requisition. The result is a planning process that engages Procurement as a member of the Acquisition Team early in the acquisition planning process.

By forming the acquisition team early and keeping all team members—Requisitioner, Program Management, Budget, and Procurement—involved throughout the procurement life cycle, DOC moves toward a procurement environment where requisition documentation is complete and accurate the first time, thus eliminating rework and significantly increasing the quality of the requisition package. Forming the acquisition team early also provides for early identification of schedule deliverables and milestones.

The role on the team for Procurement is that of Business Broker. This Business Broker role significantly changes Procurement's relationship with customer organizations. As depicted in Figure 2.2, the traditional approach required customers to develop their requisitions independently. After submission, Procurement would then evaluate the requisition, which too often resulted in sending the requisition back to the Requisitioner in an "over the fence" manner for rework. This created Program Management and Requisitioner frustration, generated negative attitudes about Procurement's ability to be helpful, and caused significant process delays, especially in large procurement actions.

In the Business Broker environment, Procurement, as an early member of the acquisition team, guides the team in the definition of requirements and advises it on sourcing. Because of this, the team avoids mistakes, follows all necessary regulations, and considers all its options for contracting. Once the requisition is submitted formally to Procurement via C.Request by the team lead Requisitioner, Procurement switches from advisor to team leader as the solicitation and award process begins.
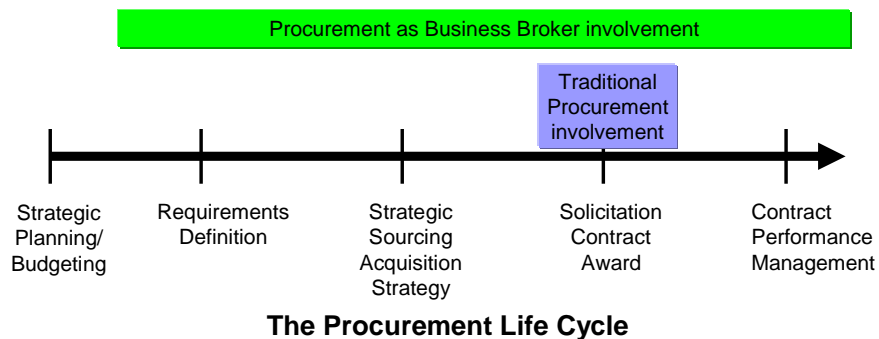
Figure 2.2: Business Broker vs. Traditional Procurement Life Cycle Involvement

Focus on Performance-Based Procurements

The focus is on performance-based acquisition, whenever possible. While the BPR & Data Standardization team recognizes that making the procurement process more performance-based will take time, incorporating that philosophy into the creating the requisition reinforces the effort and will allow people to evolve their experience with this new performance-based approach.

Single System for Requisition Processing

The '1.0 Create the Requisition' common process design completely incorporates the use of C.Request. This includes requisition and support document development, obtaining approvals electronically, validating the ACCS string in the CFS system, and submitting the finished requisition to Procurement. Use of this common system will improve the DOC's cross-servicing capabilities, especially through the standardization of C.Request data.

Role of Bureau Management in Enforcing Common Process Execution

The C.Request system takes a step forward in requiring common data in all bureaus for requisitions and the electronic approval and submittal to Procurement. However, the system does not automatically enforce standardization through edits, nor does it support automatic routing for approvals by contract type or dollar amount. Additionally, there is no linkage between approval completion and the commit (validating the ACCS string through CFS) and submit functions. The proper execution of these functions can be accomplished only through the disciplined application of bureau policies, practices, and management performance reinforcement by bureau management.

Criteria for TO BE Process Design

In designing new common processes for creating requisitions, the team asked itself a series of questions. These questions helped to drive decisions when presented with alternatives. Whenever possible, they designed the process to the principles reflected in these questions.

- Will this build quality in from the beginning?
  - Are we involving people early in the process so downstream errors are avoided?
  - Does this eliminate throwing documents "over the wall," thus removing an us vs. them situation?
  - Are we building in "'interim" checks to avoid end-of-production rework?
  - Are we entering data into a system when it is available, not when needed downstream?

- Will this avoid multi-step/cycle reviews and checks?
  - Are we investing decision-making authority "empowerment" as close to the front line as possible?
  - Are we making authority and accountability known and clear?

- Will this eliminate redundant work?
  - o Are we reducing or eliminating double-keying of information into different systems?

- Will this allow us to work in parallel whenever possible (instead of linearly) to shorten processing time?

- Will this provide alternative paths to speed processing and reduce complexity?

- Are we using technology to improve our performance and ability to:
  - o Remove bottlenecks?
  - o Speed the process?
  - o Increase outcome quality?

TO BE Process Definitions

To understand how the common process "1.0 Create the Requisition" will function, there are process flow diagrams as well as narrative documentation. The process flow diagram for each sub-process describes the relationship of the sub-process steps, triggers to initiating work, and the linkages to other sub-processes. The narrative documentation is formatted to describe each step with the following information:

- The outcomes produced
- The roles involved in executing the step
- Whether or not C.Request is used in step processing
- Governing policies and practices
- Other systems that may be used in the step
- Bureau-specific processing requirements

To read the process flow diagrams, a legend is provided here. Each shape on the diagram has a specific meaning as depicted in Figure 2.3: Process Flow Legend.
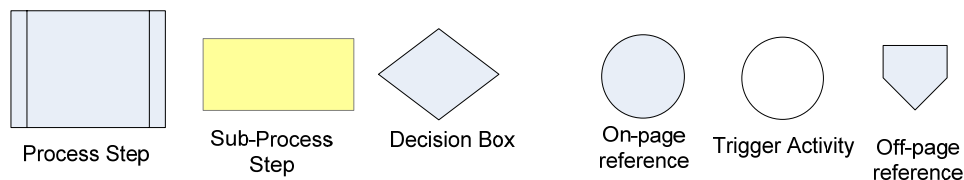
Process Step   Sub-Process Step   Decision Box   On-page reference   Trigger Activity   Off-page reference

Figure 2.3: Process Flow Legend

1.1 Plan the Acquisition and Requisition

Large Procurement   Simplified Procurement

Customer Need Identified → 1. Get Statement of Need

2. Determine if spending plan exists

Does Funding Exist? —No→ Is Funding Promised? —No→ Seek Funding

Yes (Does Funding Exist?) / Yes (Is Funding Promised?)

3. Form Acquisition Team —As required→ 4. Form Sub-teams

As required → 5. Conduct Informal Market Research

6. Develop Detailed Requirements List

9. Formulate Schedule for Planned Deliverables

10. Formulate Milestone Schedule

7. Identify Required Support Documents —As required→ 8. Obtain Required Program Approvals

For large, long-lead procurements, external approvals may be necessary. (CITRB, ARB)

Return for revision

11. Submit Assembled Acquisition Plan for Approval —Not approved→ Stop

Approved → 1.2 Develop Requisition

Simplified Procurement

Customer Need Identified → 1. Get Statement of Need

2. Determine if spending plan exists

7. Identify Required Support Documents

Approved

1.2 Develop Requisition

1.1 Plan the Acquisition and Requisition

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.1.1 Get statement of need	Written need	Program Requisitioner	Must define the need specifically enough to proceed with concrete planning. NOAA Acquisition Handbook and FY Advanced Acquisition Planning Guidance. OS Year-end Acquisition Deadline is July 1.	No	SAM (NOAA)	Who receives the need statement will vary by bureau. NOAA: Acquisitions should be planned in SAM when needs are identified and it is determined that they will be acted upon.
1.1.2 Determine if spending plan exists (1) If funding exists, go to 1.1.3 (2) If funding is anticipated (promise to pay), go to 1.1.3 (3) If funding is not available, seek funding	Funding does or does not exist	Administrative or Budget Officer	Congressional budget request for major systems, spend plan or budget for smaller. FAR specifically allows for soliciting "subject to availability of funds" and also specifically (FAR 6.301(c)) states that lack of advance planning or funding concerns do not justify acquisition without full and open competition.	No	Excel	None

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.1.3 Form acquisition team Number of people assigned to team varies based on the scope of the need.	Members identified Communications plan Acquisition Strategy Plan	Requisitioner, Program Area, COTR designee, budget, and Acquisition staff members. Additional team members as needed For requisitions over $100K, add small business specialist and Office of the General Counsel.	Performance-based contracting policy. Must involve those to be directly affected by the outcomes. Could be cross bureau involvement. Modifications to a contract must be planned in timely manner. Team should develop a communications strategy/plan appropriate for the scope of the need. If more than the micro-purchase threshold, the Acquisition Office should be consulted. Above the simplified acquisition threshold, they must be involved with the team to ensure all requirements are specified well. If there is a dire/urgent need within days, the acquisition must be contacted and directly involved immediately.	No	None	Bureaus must follow its acquisition lead times. These are established or at least reviewed annually.

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.1.4 Form sub-teams Sub-teams, as required, may include: a. Market Research b. Past Performance Evaluation c. Technical Evaluation d. Cost Review e. Quality Assurance f. Source Selection g. Competition Enhancement	Members identified Often Acquisition Team members lead sub-teams.	For requisitions over $100K, add small business specialist and Office of the General Counsel as team members.	Performance-based contracting policy Sub-teams will tackle different aspects of the planning based on the scope of the need. Sub-teams feed their outcomes to the Acquisition Team. Sub-teams are not needed for plans with smaller scope. FAR 1.102-4 provides for an acquisition team. As required, the acquisition team may be organized into sub-teams as necessary.	No	None	None
1.1.5 Conduct informal market research to determine availability (optional step as needed)	Available product or service in the marketplace.	Acquisition Team and/or sub-teams	Bureau-specific. This type of informal market research is "surveillance" in nature. The depth of research will vary depending upon the procurement being planned.	No	Internet research	None
1.1.6 Develop detailed requirements list	Written listing of requirements (what you are trying to accomplish)	Acquisition Team and sub-teams work collaboratively to reach consensus.	Bureau-specific. Use results oriented language.	No	Microsoft Project	None

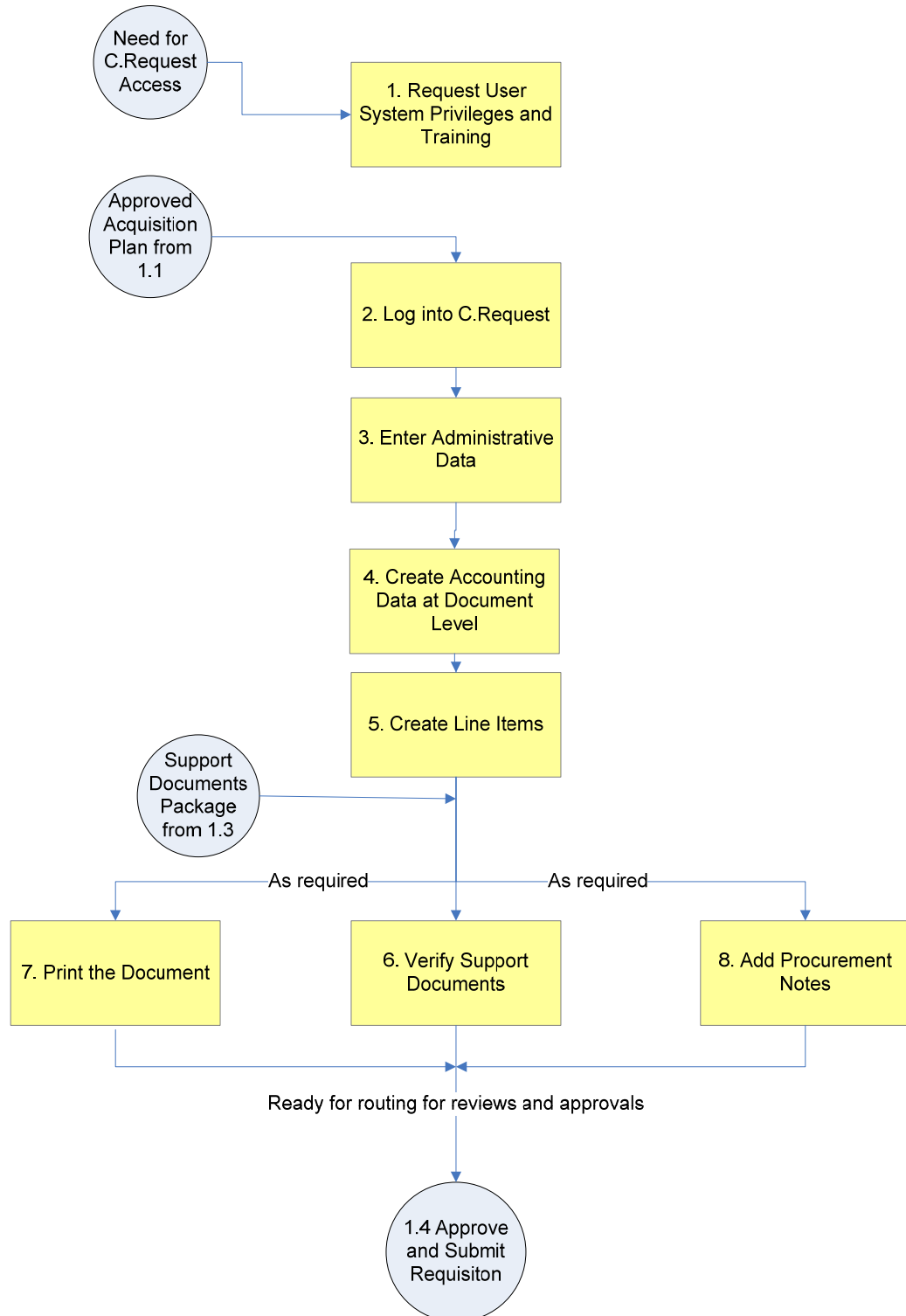| Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.1.7 Identify required support documents	Listing of supporting documents required (need-driven)	Acquisition Team and/or Sub-Teams	Bureau-specific. Required support documentation varies by the scope of the need and what is to be bought (e.g., SOW, Market Research plan, Exhibit 300 plan). If external approvals are needed for certain support documents, the development of the program-level support documents takes place in this step before the requisition is developed.	No	Microsoft Project	Acquisition Waiver Request (AWR) required in for most offices in OS for procurements over $100K.
1.1.8 Obtain required program approvals (e.g., CITRB, ARB)	External Approvals obtained	Requisitioners, Approving Officials, Reviewers, Applicable Oversight Boards	FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy. External approvals are not always required. Dollar thresholds or other Bureau/DO guidance may require them.	No	Email	None
1.1.9 Formulate schedule for planned deliverables	Schedule developed	Acquisition Team and sub-teams	Bureau-specific This includes all milestones.	No	Microsoft Project SAM (NOAA) Excel	NOAA: Uses Procurement Action Lead Times established and associated with dollar value and acquisition strategy per AGO memo dated 2/28. The potential exists for bureaus to use C.Request and CSTARS for scheduling deliverables.

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.1.10 Formulate milestone schedule	Plan showing events and plan to get to award	Acquisition Team		No	Microsoft Project	The potential exists for bureaus to use C.Request and CSTARS for scheduling milestones.
1.1.11 Submit assembled acquisition plan for approval (level of plan detail will vary with size/complexity of procurement)	Approved written plan Approved by both Program office and Contracting Officer	Acquisition team Review groups: Program, Contracting, Legal	FAR, bureau-specific. Acquisition team is responsible for assembling all components of the plan and validating its completion. Electronic submissions for review and approval. This step is/can be accomplished through SAM (NOAA), although DOC also requires formal acquisition plans above $5M and the ARB/ITRB above $10M. This step is not applicable to Simplified Acquisitions under $100K.	No	Submit electronic-ally using acquisition planning system, if available	

1.2 Develop Requisition

1.2 Develop the Requisition

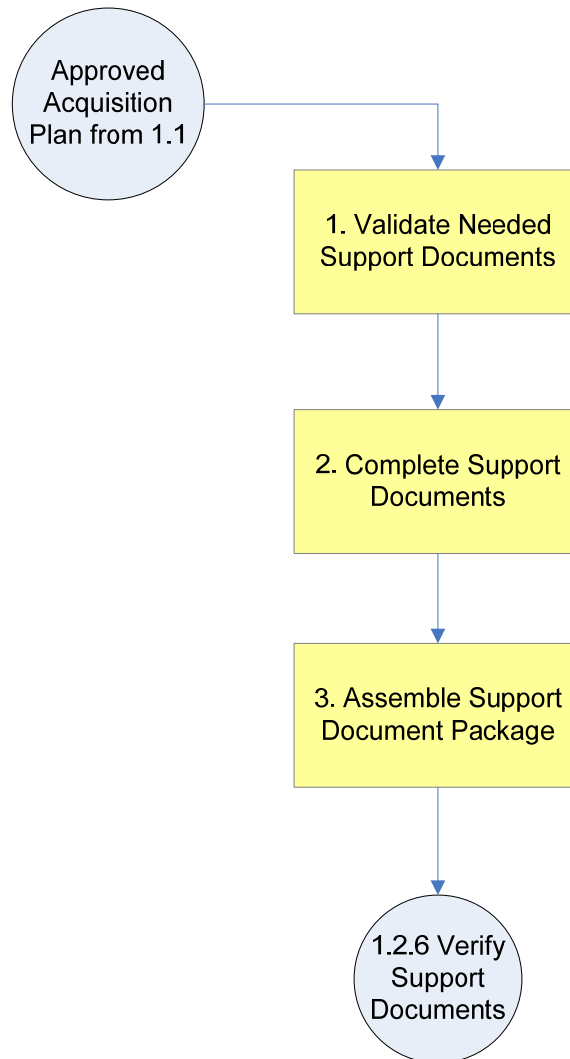| Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.2.1 Request user system privileges and training	Access/ Privileges Granted	System Administrators, Supervisors, Requisitioner	Requisitioners, reviewers, and approvers require clearances, training, and correct authority levels. This results in the user profile being established. Some users may wish to develop standard templates (e.g., for drop-down lists or forms) for individual or bureau use. Bureaus have common policies regarding IT Security and access issues. Training is required prior to accessing the system and entering data.	Yes	E-mail, Fax, Telephone	Bureau may have varying procedures regarding user access and password requirements.
1.2.2 Log into C.Request	System available for use	Requisitioner	C.Request user documentation and training provided	Yes		Requisitioner role is agency defined and could be the person with the requirement or administrative staff assigned to enter requisitions.
1.2.3 Enter administrative data	Document number assigned, and general information entered	Requisitioner	C.Request user documentation and training provided (e.g., System-Generated Information).	Yes, using admin. screen	None	Drop-down list values shown may be a subset of the common values that are specific to the user.

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.2.4 Create accounting data at document level (preferred but optional)	Default ACCS	Requisitioner	Financial Policy, C.Request User Documentation and Training provided. Requisitioners will obtain ACCS from budget official to certify funds. Cannot put ACCS from different Finance Offices on same requisition.	Yes	CBS Finance System	None
1.2.5 Create line items (accounting can be added at the line item level if different from document level or not existing at document level)	Specific details on individual line items entered. Includes descriptions, ACCS, funding distribution, dates, deliverables, etc.	Requisitioner	C.Request user documentation and training provided. System fills line item accounting with document level accounting automatically. Cannot use ACCS from different finance offices (e.g., NIST, NOAA, OS or CENSUS) on the same requisition.	Yes	None	None
1.2.6 Verify support documents are attached (input from process 1.3)	Supporting documents are attached	Requisitioner	Documents are attached to the requisition as they are completed in process 1.3. This process assures that the most up to date and all required documents were attached.	Yes	Word Processing Programs, Spread-sheet	None
1.2.7 Print the document	Physical requisition document	Requisitioner	Optional, for those who require paper documentation. Can be done at any time after administration screen.	Yes	None	None
1.2.8 Add procurement notes	Additional information provided to the acquisition office	Requisitioner	Optional. Additional suggested vendors are added here. Can be done at any time after administration screen.	Yes	None	None

1.3 Finalize Support Documents

Approved
Acquisition
Plan from 1.1

1. Validate Needed
Support Documents

2. Complete Support
Documents

3. Assemble Support
Document Package

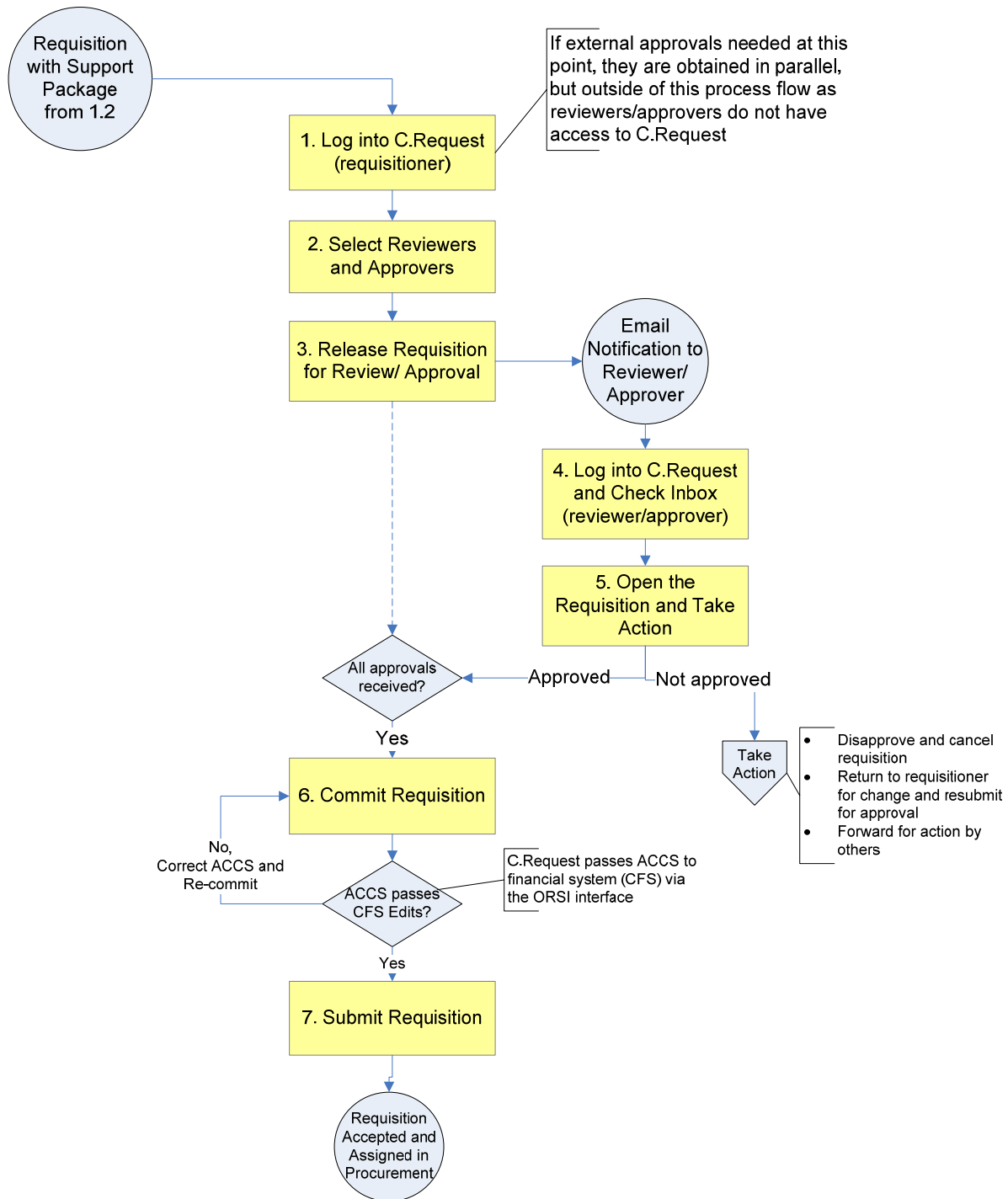1.2.6 Verify
Support
Documents

1.3 Finalize Support Documents

Sub-process steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.3.1 Validate needed support documents (e.g., SOW, Sole Source Justification, 508 Checklist, Acquisition Waiver (OS))	List of necessary documents / forms to be completed prior requisition submission	Requisitioners, Contract Specialist, Approving Officials	FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy	No	Bureau Acquisition Website, DOC Acquisition Website	None
1.3.2 Complete support documents	Completed support documents	Requisitioners, Contract Specialist	FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy	Yes	Internet, Acquisition Planning System, MS Office	SAM
1.3.3 Assemble support document package	All supporting documents have been attached to the requisition	Requisitioner	Can be done any time after the administration screen is completed. Documents are attached to the requisition as they are completed.	Yes	None	

1.4 Obtain Approvals and Submit Requisition

Requisition with Support Package from 1.2

If external approvals needed at this point, they are obtained in parallel, but outside of this process flow as reviewers/approvers do not have access to C.Request

1. Log into C.Request (requisitioner)

2. Select Reviewers and Approvers

3. Release Requisition for Review/ Approval

Email Notification to Reviewer/ Approver

4. Log into C.Request and Check Inbox (reviewer/approver)

5. Open the Requisition and Take Action

All approvals received?

Approved — Not approved

Take Action
- Disapprove and cancel requisition
- Return to requisitioner for change and resubmit for approval
- Forward for action by others

Yes

6. Commit Requisition

No, Correct ACCS and Re-commit

ACCS passes CFS Edits?

C.Request passes ACCS to financial system (CFS) via the ORSI interface

Yes

7. Submit Requisition

Requisition Accepted and Assigned in Procurement

1.4 Obtain Approvals and Submit Requisition

Sub-Process Steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
Internal review and approval guidance:						
Internal groups are defined as those within the bureau, usually the immediate office.						
Applicable approval policy includes that of the FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy. Bureaus have written policy regarding the type of approvals and levels. Bureau approval policies (amounts and timeframes) differ. Bureaus are encouraged to standardize approval levels (based on proposed procurement dollar amount) wherever possible. Some bureaus have checklists on their procurement Web site for approval guidance (should always include appropriate reviewers for IT, 508, Greening of Government, Security, and Property). All bureaus are encouraged to move away from hard copy signature approvals and use the C.Request electronic routing and approval process.						
External review and approval guidance:						
External approvals are normally obtained in the Acquisition Planning Process (see 1.1 Plan the Acquisition and Requisition). However, if an external approval is needed at this point in the process (see FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy), those approvals must be obtained outside of the C.Request system as those external to the bureau cannot access C.Request. The requisition package must be electronically attached to an email to the external approvals. Responses must be tracked separately.						
1.4.1 Log into C. Request	Access to system	Requisitioner	All routing for review and approvals will be done using C.Request. Only exceptions are external reviews. All reviewers/approvers must be on C.Request drop-down list. All user profiles must be up to date.	Yes		Census: May have an additional process for the budgetary approval. They currently use CFS to enforce routing and approval cycle.

Sub-Process Steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.4.2 Select Reviewers/ Approvers	Route list for the particular requisition Reviewer/ Approvers will vary by dollar value.	Requisitioner	Selection can be supported with performance aids for selecting approvers if standard electronic lists do not exist. Routing list can be set up any time after the administration screen for the requisition is completed in C. Request. Reviewers minimally must include a budget funds certifier and purchase authorizer (roles may be in the same person). The electronic approval is a special password. These are "official." Reviewers and approvers can forward their "inbox" for approving to alternate approvers when they are not available (must be part of their training). At least one additional person (one level above the Requisitioner) should be required to review/approve a requisition. Exception for two approvals: • One person in program • Approver has both budget and program control • Anyone who has a micro purchase threshold Requisitioner may include him/herself at the end of the routing list to create an automated notification back to him/herself to track a status of requisition.	Yes	SAM Bureaus or program offices may use other advanced acquisition planning tools.	OS: Additional need to enforce routing (Office of Executive Budget-OEB); The RED STAMP problem. This will need to change.

Sub-Process Steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.4.3 Release requisition for review and approval	Requisition sent to reviewer(s)/ approver(s)	Requisitioner	Requisitioner releases the requisition in the C.Request system, which shows up in the inboxes of the reviewer(s) / approver(s) that are designated in the routing list. User profiles should carry e-mail address for C.Request to automatically send e-mail notification that C.Request has approval work for them, thus eliminating Requisitioner e-mails. Note to System Administrators: (NOAA, Census, and OS will need to work with Office of Computer Services to set up user profiles.) Internal approvals should be electronic signature. Entire requisition package is sent to all simultaneously, unless route list specifies a certain sequence.	Yes	email	NIST: Change Control Board (IT Projects)
1.4.4 Log into C.Request and check inbox	Successful login and requisition is in inbox	Reviewer/ Approver	C.Request training and user manuals Requisitioner successfully released a requisition.	Yes	None	None

Sub-Process Steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.4.5 Open the requisition and take action	Approve, disapprove, return for change, forward to some else for action/info.	Reviewer/ Approver	Must take an action as described in **Outcome produced** column in order to keep the requisition moving through the system. If disapproved, the requisition goes back to the Requisitioner for changes as needed. The Requisitioner would make changes and re-release. Disapproval may stop the requisition, which will then be cancelled.	Yes	None	None
1.4.6 Commit the requisition	CFS returns validated ACCS to Requisi-tioner	Requisitioner / approver	Validated is defined as an ACCS, which legally exists in the CFS system. This does not mean this is the correct ACCS for the particular requisition. C.Request sends requisition ACCS string through the ORSI interface to CFS. Issue: Without commitment accounting, there is no way to keep organizations from reserving funds against an ACCS. C.Request/CFS has the capability to commit, not just validate, but this functionality is not turned on.	Yes	CFS	Bureaus will set policy as to who is allowed to commit the requisition in C.Request and when it occurs (after all approvals, before or during).

Sub-Process Steps	Outcome produced	Who is involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems?	Additional bureau specific reqs.
1.4.7 Submit the requisition to Procurement	Successful receipt in CSTARS by Procurement Procurement adds data to the requisition, which includes acceptance status and who is/was assigned to the requisition for solicitation and contract award.	Requisitioner / approver	It is procurement's role to review and accept the approvals. Once submitted, the requisition is locked and data cannot be changed by the Requisitioner. To change a requisition after submission, the original requisition is returned to the Requisitioner. The commitment is cancelled, changes are made to the requisition, the requisition is recommitted (if needed) and resubmitted. Alternatively, the requisition can simply be cancelled. The requisition should be printed off in Procurement to be the "copy of record" as defined in FAR Part 4. The Requisitioner can check the status of the requisition as Procurement makes progress on the solicitation/award using CSTARS. This is done through the C.Request section called "Related Documents."	Yes	CSTARS	Bureaus will set policy as to who is allowed to submit the requisition to procurement via C.Request.

Section 3: TO BE Performance Metrics

Introduction to Suggested Performance Metrics

The Department of Commerce uses a "Balanced Scorecard" approach to performance metrics (http://bscears.ocs.doc.gov/Portal/backToMain.do). Using data from FPDS-NG, surveys and the Workforce Assessment Database (WAD) sources reported through EARS, the DOC Acquisition Community receives annual feedback (updated quarterly) at bureau and department levels. The performance metrics suggested for "'1.0 Create the Requisition" supplement these high-level data. The metrics were selected to provide line managers, offices, and Requisitioners with timely feedback for smart decision-making to improve their Procurement operations.

These metrics are a first cut at bringing accountability to the requisition process and those who take part in it. In some cases, data from C.Request can be used if additional reporting capabilities are provided. In other cases, survey tools or other data collection techniques may be required. The framework for the design of these measures consisted of four types and four elements as described in Table 3.1.

Table 3.1 Metric Types and Elements

Metric Types	Metric Elements
Productivity: Volume of output **Efficiency:** Speed and/or cost of output production **Quality:** Errors or amount of rework, problems, etc. **Customer satisfaction:** Process quality	**Unit of measure:** The output (e.g., requisition), type of action, amount of dollars **Performance period**: The length of time during which performance is measured (e.g., day, week, month) **Organization level:** The lowest level at which the measurement is meaningful for continuous improvement decision making (e.g., individual, workgroup/team, office) **Data collection method:** The most feasible and effective way to collect accurate data

No single metric can "tell the whole performance story." By using metrics in combination, an accurate picture of performance can be told. For example, if you look only at efficiency and productivity measures without examining and balancing them with quality and satisfaction measures, you may reward people for fast and high-volume productivity behavior that results in downstream errors and dissatisfied customers.

The team recommends that further discussions, research, and piloting is needed before performance metrics are put in place. Management, Procurement staff, and Requisitioners need to become comfortable with the concept of performance management and accountability. They must be supported with training in the subject, as well as evaluation of performance results to identify linkages between results and behavior and the use of techniques for problem-solving and action-taking.

Overall Process Metrics

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level (lowest)	Proposed Data Collection Method	Suggested Target
Process Efficiency	• Timeliness of complete requisition process Elapsed time from creation of requisition number in C.Request through submission of requisition to procurement office press the "submit" button. Sometimes numbers are assigned just to get in the queue, and work is not processed diligently. This metric (if used alone) could be misleading. Also depends on complexity of requirement.	Requisition	Monthly	Requisitioner	Electronic	Establish a baseline, then set targets. May have different targets based on type of action.
Requisition Quality	• % of requisitions returned for errors or further information by procurement office An alternative to this would be the % requisition $ returned. This properly puts responsibility on the program office and measures rework caused by PM errors.	Requisition	Monthly	Requisitioner	Electronic	5% or less

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level (lowest)	Proposed Data Collection Method	Suggested Target
System Quality	• % Requisitioner system problem calls reported to C.Request help desk (or system administrator) An alternative may be the % hours per month system up and running. The measure might be the % satisfied with help desk support to measure help desk quality.	Calls	Monthly	Instance of C.Request	Help desk tickets analysis	Establish a baseline, then set targets
Customer Satisfaction	• % customers who rate procurement office involvement in acquisition planning and requisition processes as excellent or very good	Survey responses by requisition	Quarterly	Procurement office	Survey sent to program manager and Requisitioner upon submission of requisition to procurement.	80% May not do this for small purchases, GSA or simplified contracts where procurement office involvement is not required.

1.1 Plan the Acquisition and Requisition Metrics

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level	Proposed Data Collection Method	Suggested Target
Efficiency	Timeliness of the planning process, for example: • % plans started • % plans completed • Average planning time	Type of action	Monthly	Requisitioner	Electronic	Establish a baseline, then set targets
Output Quality	• % times plan returned to Requisitioners for incomplete plan or wrong information entered into the planning system	Type of action RETURNS This measures rework caused by Program Office	Monthly	Requisitioner	Electronic and possibly manually	0 returns 0% RETURNED
The challenge for tracking acquisition plan timeliness is to identify a starting point for performance measurement and deciding when to enter data into the system for a plan.						

1.2 Develop the Requisition Metrics

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level	Proposed Data Collection Method	Suggested Target
Efficiency	• Elapsed time to develop the requisition in the C.Request Because requisitions are not always worked on a dedicated basis after number is assigned, acceptable ranges should probably be set for each type of action.	# minutes	Monthly	Requisitioner	Electronic, from time requisition # number created in C.Request to time the routing list is created for requisition	5-30 minutes/ requisition depending upon the complexity
Productivity	• # of actions (requisitions) processed	Requisition	Monthly	Requisitioner	C.Request counts	Varies by office
Customer Satisfaction	• % complaint calls to help desk Measure calls closed out by help desk or closed on the first call.	Call	Monthly	Requisitioner	Counts kept by help desk or System administrator.	0 complaints
Output Quality	• % of ACCS returned for collection	Error message	Monthly	Requisitioner	Electronic count of errors messages sent from CFS back to C.Request.	0 errors
Some of these measures may require reports out of C.Request to be developed						

1.3 Finalize Support Documents Metrics

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level	Proposed Data Collection Method	Suggested Target
Productivity	• # of support documents by type	Support document	Quarterly	Bureau	Electronically from C.Request	TBD
Output Quality	• % of support documents by type returned for correction	Support document	Quarterly	Bureau	Manually, on a sample basis	TBD
Customer satisfaction	• Level of satisfaction with business broker for support document development This measure may appear to run counter to the actions returned to PM - the customer must be knowledgeable about their requirements and be accountable for document quality. It is not just "general procurement support."	% customers satisfied	Quarterly	Bureau	Electronic customer survey	TBD
Support documents by type: 300B, JOFOC, Small Business Plan, etc.						

1.4 Obtain Approvals and Submit Requisition Metrics

Metric Type	Performance Metric(s)	Unit of Measure	Performance Period	Organizational Level	Proposed Data Collection Method	Suggested Target
Customer Satisfaction	• % customers satisfied with the electronic review and approval process Ease of use could be measured.	Individual reviewer or approver	By requisition is possible for larger procurements or quarterly for smaller procurements.	Individual	Electronic survey	60% positive approval or possibly higher
Efficiency	• Time required to review and approve a requisition Targets would be set by type or size of action as a huge SOW will require more time than a simple requisition.	Days	Monthly	Individual	Electronic, using C.Request to calculate the time from time review request sent to time completed, using routing codes	95% reviewers/ approvers • 1.5 days • 7 days (LT or EQ <$1 Million) • 10 days (>$1 Million)
Efficiency measures may require that ad hoc reports be developed for C.Request						

Section 4: Gap Analysis

Critical Elements for Implementation Success

With the new process "Create the Requisition" developed and agreed upon, the BPR & Data Standardization team began the analysis of what needs to be accomplished to ensure a smooth transition from the old to new environment. This work is not complete and needs to continue.

The primary effort for the bureaus has been on training end users (Requisitioners, Reviewers/Approvers) and System Administrators. Training is an essential component to project success, but it is only part of the solution. To smoothly transition to using C.Request and the new common processes, Bureau leadership must address each of the following critical change management elements.

Communications

Each of the primary audiences—Requisitioners, Procurement staff, Program offices—must have answers to the following questions as well as an understanding of the specific changes:

- Why are we doing this?
- Will I be capable of using the system?
- What's in it for me?

People need to be aware of what will happen, understand the changes, accept the changes, and, finally, commit to and support the changes after go-live.

Leadership Alignment

Bureau BPOs/HCOs must demonstrate their commitment to and support of the change effort to engage their middle managers to prepare their people, policies, and practices in addition to ensuring that everyone who needs to be trained—Requisitioners, Procurement staff, Program offices— is trained by go-live.

Business Readiness

All end user profiles, bureau drop-down lists, access and security must be in-place, tested and operational before go-live. Additionally, each bureau unit must identify and adjust the policies, work practices (business rules), job roles, and workflows affected by the introduction of the new system and process. These adjustments must be communicated through bureau leadership, taught in training along with computer training, and reinforced on the job after go-live.

Performance Support

Moving through the learning curve after a cutover to a new system should be as smooth as possible so production of daily work is not significantly affected. Initial training is only the beginning of performance support. Tools and techniques must be put in place to ensure continuous improvement. These techniques should be embedded into the fabric of the organization. They include such things as performance metrics, communities of practice, super user networks, help desks, performance aids (online or printed), and refresher training.

Gap Summary

Given the individual bureau gap analysis work, it is easy to see that each bureau has very different change management needs. The more dramatic the gap between today's ways of working and the new process and system is, the greater the need for change management efforts. Conversely, those making the most dramatic changes have the opportunity to reap the greatest benefits.

- **NIST** has the fewest changes to its current way of creating requisitions. This bureau has used the client server version of C.Request for several years quite successfully. Training will be targeted to new features. They are already using many of the new process features (e.g., electronic routing for review and approvals, electronic signatures).

- **Census** uses automation for requisitioning, but not C.Request. It will continue to use the CFS routing functionality for financial approvals as that is a successful application for them and affords some enforcement capabilities. However, the data must be re-entered into CFS once the requisition is submitted to Procurement via CSTARS. Everyone in Census associated with requisitioning will require training in both process and C.Request. Because of limited resources for the project, communications throughout its acquisition community is needed. Also, Census feels the need to add discipline and consistency to its planning activities that precede requisition development.

- **NOAA** is moving from a manual requisition environment to C.Request and has the most people to train due to the size of the bureau and the additional bureaus it supports. This requires a strategic rather than blanket approach to end user training. It also presents a communications challenge. NOAA has automated its acquisition planning process with the use of SAM. There may be some duplicate data entry required as there is no interface between SAM and C.Request.

- **OS** (Office of the Secretary), like NOAA, is moving from a manual to an automated environment with C.Request. Although not as large a bureau, it has units with unique missions, which necessitates distinctive requisitioning needs and processes. The challenge for OS is to bring discipline and consistency to these smaller units and to communicate with them in ways that are meaningful to each. OS managers appear to need more communications and assistance in understanding, accepting, and committing to the new system and processes. A sense of urgency is needed to ensure timely end user training.

NIST Gaps
1.1   Plan the Acquisition and Requisition

New Common Process	Performance Gaps [If yes, enter ✔]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Get statement of need				
2. Determine if spending plan exists				
3. Form acquisition team				
4. Form sub-teams (need driven)				
5. Formulate schedule for planned deliverables				
6. Formulate milestone schedule				
7. Identify required supporting documents				
8. Develop detailed requirements				
9. Conduct informal market research to determine availability				
10. Submit assembled acquisition plan for approval				
Ideas for change actions and/or performance improvements				
C. Request does not change the NIST Acquisition Planning process. However, NIST uses an Excel spreadsheet to capture spend plans, but does not have an Acquisition Planning system.				
Communications & Training End Users and/or Management				

1.2 Develop the Requisition

Common Processes	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Request user system privileges and training				
2. Log into C.Request				
3. Enter administrative data				
4. Create accounting data at document level				
5. Create line items				
6. Verify support documents				
7. Add procurement notes				
8. Print the document				
Ideas for change actions and/or performance improvements				
C.Request is used today. Just moving to a new version.				
Communications & Training End Users and/or Management				

1.3 Finalize Support Documents

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	**Workflow**	**Job Roles**	**Policy & Practices**
1. Determine/Validate needed documentation				
2. Complete support documentation				
3. Assemble support document package	✓			
Ideas for change actions and/or performance improvements				
Attaching support documents electronically must be incorporated into future training.				
Communications & Training End Users and/or Management				

1.4 Obtain Approvals and Submit the Requisition

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Log into C.Request				
2. Select reviewer/approvers				
3. Release requisition to Reviewer / Approver				
4. Log into C.Request and check inbox				
5. Open the requisition and takes action				
6. Commit the requisition	✓	✓		✓
7. Submit the requisition to Procurement				
Ideas for change actions and/or performance improvements				
Need to incorporate commit process and associated error handling into future training.				
Communications & Training End Users and/or Management				

Census Gaps
1.1   Plan the Acquisition and Requisition

New Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Get statement of need				✓
2. Determine if spending plan exists	✓	✓	✓	✓
3. Form acquisition team				✓
4. Form sub-teams (need-driven)				
5. Formulate schedule for planned deliverables				
6. Formulate milestone schedule				
7. Identify required supporting documents			✓	✓
8. Develop detailed requirements				✓
9. Conduct informal market research to determine availability				
10. Submit assembled acquisition plan for approval	✓			✓
Ideas for change actions and/or performance improvements				

1. Program areas do not understand performance-based procurement concept.
2. No easy online way to reference a spending plan.
3. Getting staff to commit time to a project from a program area is difficult.
7. Need common understanding of requirements.
8. Program area does not understand phrasing requirements in terms of outcomes rather than process.
10. There is often disagreement about the need for components – no technological way to submit a plan (some use Microsoft project for acquisition planning).

Communications & Training
End Users and/or Management

Advance briefs, plus:
1. Intense training of program areas in performance-based requirements. This is MANDATORY.
2. Dialog with Finance and Budget regarding the spending plan.
3. Ongoing educational programs for Requisitioners giving realistic views of requirements and lead-in time requirements.

1.2   Develop the Requisition

Common Processes	Performance Gaps [If yes, enter ✓]			
	Technology	**Workflow**	**Job Roles**	**Policy & Practices**
1. Request user system privileges and training	✓	✓	✓ (System administrator)	✓
2. Log into C.Request	✓	✓		✓
3. Enter administrative data	✓	✓		✓
4. Create accounting data At document level	✓	✓		✓
5. Create line items	✓	✓		✓
6. Verify support documents	✓	✓		✓
7. Add procurement notes	✓	✓		✓
8. Print the document	✓	✓		✓
Ideas for change actions and/or performance improvements				
We do not have any technology system for requisitions today. We have an electronic system used by the acquisition staff. We need policy and practices for Requisitioners for using C.Request. System administrator role added.				
Communications & Training **End Users and/or Management**				
Need NOAA training. Need to communicate (probably via email) to alert Requisitioners that C. Request and training is coming. Need to conduct current user and ongoing replacement training.				

1.3   Finalize Support Documents

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	**Workflow**	**Job Roles**	**Policy & Practices**
1. Determine/Validate needed documentation				✓
2. Complete support documents	✓			✓
3. Assemble support document package	✓			✓
Ideas for change actions and/or performance improvements				

Need to bring program areas on board regarding process requirements and using C.Request.

Need new technology to assist in support document development.

Need to build electronic checklists for C.Request for support document tracking (C.Request enhancement).

Communications & Training
End Users and/or Management

Need training in defining requirements, selecting appropriate support documents, and developing high-quality content for program areas and Requisitioners.

1.4   Obtain Approvals and Submit the Requisition

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Log into C.Request	✓	✓		✓
2. Select reviewer/approvers	✓	✓		✓
3. Release requisition to Reviewer / Approver	✓	✓		✓
4. Log into C.Request and check inbox	✓	✓		✓
5. Open the requisition and takes action	✓	✓		✓
6. Commit the requisition	✓	✓		✓
7. Submit the requisition to Procurement	✓	✓		✓
Ideas for change actions and/or performance improvements				
Need to adapt current approval process to C.Request.				
Communications & Training End Users and/or Management				
Create performance aids.				

NOAA Gaps

1.1 Plan the Acquisition and Requisition

New Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Get statement of need	✓			
2. Determine if spending plan exists				
3. Form acquisition team				
4. Form sub-teams (need-driven)				
5. Formulate schedule for planned deliverables				✓
6. Formulate milestone schedule				
7. Identify required supporting documents				
8. Develop detailed requirements				
9. Conduct informal market research to determine availability				
10. Submit assembled acquisition plan for approval	✓ Enter into C.Request			

Ideas for change actions and/or performance improvements

NOAA is using the acquisition planning system (SAM) today. For performance metrics to be collected electronically, a plan submission date is needed in SAM along with some way to capture rework of the plan. Other enhancements should include:

- Add column in SAM to identify procurements that are IT, 508, and security-related.
- Add requirements checklists (support documents) drop-down list: date received, date revised, date needed, and date completed for each support document.

Customers need a deeper and broader understanding of requirement development (lead) times. This could be provided on the Web site using better graphics and reminders (graphic 508 issue).

Communications & Training -- End Users and/or Management

Discuss C.Request at CFO conference(s).

Focus on CORs to be trained; brief to communicate need for training of customers.

Identify reporting needs. One approach is to have program managers identify the types of report they would like to see from SAM (e.g., reports by specific requirement type [IT, 508, security-related] or dollar thresholds) and C.Request (e.g., requisition listing showing requisition #, dollar amount, status, requisitioning unit, etc.).

FAQs, Tip sheets, manuals, newsletters.

Post business rules.

1.2   Develop the Requisition

Common Processes	Performance Gaps [If yes, enter ✓]			
	Technology	**Workflow**	**Job Roles**	**Policy & Practices**
1. Request user system privileges and training	✓		✓ (System administrator)	
2. Log into C.Request	✓	✓		✓
3. Enter administrative data	✓	✓		✓
4. Create accounting data at document level	✓	✓		✓
5. Create line items	✓	✓		✓
6. Verify support documents	✓	✓		✓
7. Add procurement notes	✓	✓		✓
8. Print the document	✓	✓		✓
Ideas for change actions and/or performance improvements				
Pick the best at learning new skills to train first. Develop super users to assist others in organization. Reduce ACCS changes. Communicate ACCS for each unit in a timely manner.				
Communications & Training **End Users and/or Management**				
Middle- and upper-level managers need to be aware of the importance of training. They need to know how the new system and process will affect the acquisition community as a whole when the system goes live on October 16, 2006.				

1.3 Gather Support Documents

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Determine/Validate needed documentation	✓			
2. Complete support documents				
3. Assemble support document package	✓			
Ideas for change actions and/or performance improvements				
Add drop-down list of supporting documents to SAM.				
Communications & Training End Users and/or Management				

1.4 Obtain Approvals and Submit the Requisition

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Log into C.Request	✓			
2. Select reviewer/approvers	✓	✓	✓	✓
3. Release requisition to Reviewer / Approver	✓			✓
4. Log into C.Request and check inbox	✓			✓
5. Open the requisition and takes action	✓			✓
6. Commit the requisition	✓	✓		✓
7. Submit the requisition to Procurement	✓			✓
Ideas for change actions and/or performance improvements				
Need to streamline the review and approval process.				
Communications & Training End Users and/or Management				

OS Gaps
1.1　Plan the Acquisition and Requisition

New Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1.　Get statement of need		✓		
2.　Determine if spending plan exists		✓		
3.　Form acquisition team		✓	✓	✓
4.　Form sub-teams (need driven)		✓		
5.　Formulate schedule for planned deliverables		✓		
6.　Formulate milestone schedule		✓		
7.　Identify required supporting documents		✓		
8.　Develop detailed requirements		✓		
9.　Conduct informal market research to determine availability		✓		
10. Submit assembled acquisition plan for approval		✓		

Ideas for change actions and/or performance improvements

Program managers need to be involved in all steps of the process. They must objectively focus on the quality, details, and completion of the entire package including the SON/SOW and the breakdown of CLINS.

Procurement Acquisition team members will be expected to reach out to Program offices to know more about procurement. CORs must be proactive and learn about their program environments.

Our business (Acquisition team) is broken. Program offices are expected to have information and invite procurement to the table.

Communications & Training
End Users and/or Management

1.2   Develop the Requisition

Common Processes	Performance Gaps [If yes, enter ✓]			
	Technology	**Workflow**	**Job Roles**	**Policy & Practices**
1. Request user system privileges and training	✓	✓	✓ (System administrator)	
2. Log into C.Request	✓	✓		✓
3. Enter administrative data	✓	✓		✓
4. Create accounting data at document level	✓	✓		✓
5. Create line items	✓	✓		✓
6. Verify support documents	✓	✓		✓
7. Add procurement notes	✓	✓		✓
8. Print the document	✓	✓		✓
Ideas for change actions and/or performance improvements				
Overall workflow elapsed time should be reduced using C.Request. Workflow will vary as people become more comfortable with C.Request. For example, they will stop sending e-mails with personal files. Beginning with FY07, the EOY close process will change. Process needs to be addressed in advance. Need to involve Department CFO.				
Communications & Training **End Users and/or Management**				
An enterprise-wide training plan has been developed and implemented. However, the team is concerned that mid- and upper-level (senior) management is not or may not be fully aware of the implications of ORSI deployment on the requisition workforce as part of the deployment. Training is becoming a time-sensitive issue as we get closer to the 10/16/2006 deployment go-live date.				

1.3 Finalize Support Documents

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Determine/Validate needed documentation		✓		
2. Complete support documents	✓	✓		✓ (must be electronic)
3. Assemble support document package	✓	✓		
Ideas for change actions and/or performance improvements				
The environment is not consistent. Some documents continue to be handwritten, some are electronic. In the future, all will be electronic. We must reach a common understanding of what is "complete documentation" among the program offices and Procurement (Acquisition).				
Communications & Training **End Users and/or Management**				
An enterprise-wide training plan has been developed and implemented. However, the team is concerned that mid- and upper-level (senior) management is not or may not be fully aware of the implications of ORSI deployment on the requisition workforce as part of the deployment. Training is becoming a time-sensitive issue as we get closer to the 10/16/2006 deployment go-live date.				

1.4 Obtain Approvals and Submit the Requisition

Common Process	Performance Gaps [If yes, enter ✓]			
	Technology	Workflow	Job Roles	Policy & Practices
1. Log into C.Request	✓	✓		✓
2. Select reviewer/approvers	✓	✓		✓
3. Release requisition to Reviewer / Approver	✓	✓		✓
4. Log into C.Request and check inbox	✓	✓		✓
5. Open the requisition and take action	✓	✓		✓
6. Commit the requisition	✓	✓		✓
7. Submit the requisition to Procurement	✓	✓		✓
Ideas for change actions and/or performance improvements				
The commit process should provide OS with substantial savings because many current errors come from applying an invalid ACCS ($250-500/requisition). However, this savings may be reduced if there are funds to be de-obligated at the end of a contract (CSTARS requires us to do a modification to the contract to get CFS to de-obligate any left over funds, even funds less than $50).				
Communications & Training End Users and/or Management				
An enterprise-wide training plan has been developed and implemented. However, the team is concerned that mid- and upper-level (senior) management is not or may not be fully aware of the implications of ORSI deployment on the requisition workforce as part of the deployment. Training is becoming a time-sensitive issue as we get closer to the 10/16/2006 deployment go-live date.				

Section 5: Data Dictionary

The Department of Commerce's common business processes are enabled by information technology systems that facilitate the submission of requisitions, creation of solicitations, and management of contract awards. As the C.Request system is implemented, its integration with the CSTARS and CFS systems increase the transparency of data throughout the procurement process. Much of the data entered in C.Request will be passed to CSTARS and CFS automatically, eliminating the need for re-keying of data. This means that everyone involved in the procurement process, both intra- and inter-bureau, must have a common understanding of each data element and its use.

The BRP & Data Standardization team reached consensus on the definition of each data element and how it is used in the requisition process. The team also evaluated the downstream impact on the solicitation and award processes, which is documented in Volume II: Final Report, 2.0 Award the Contract, and 3.0 Administer the Contract.

The tables that follow address the data elements for all C.Request screens. For each piece of data, the team documented:

- C.Request Screen Field Name (and amplifying text when necessary)
- Data definition
- Format of the data element
- Whether the field is a free-text field
- Whether the field is required
- An example of the data, when appropriate
- When the data elements have a common usage across all bureaus or whether the fields provides an opportunity for bureau-specific application
- Rules for creating and changing as well as any rules for administering the data

The data is presented by C.Request screen. Some fields were identified as **not used** at this time. This is due to the condition when the field is one of the following:

- A COTS holdover from other CACI Government customer requirements
- Specifically related to another CACI product in the Comprizon Suite
- An element entered later in the procurement process through CSTARS

In these cases, individual Bureaus may choose to gray out these fields to prevent confusion or, if graying out is not possible, to train people to skip over these fields.

These C.Request standardized data elements seamlessly integrate with the new common data definitions for the CSTARS and will facilitate cross-servicing and, ultimately, provide for cleaner management reporting for the procurement process.

Data Table of Contents

Screen Name: Requisition and PIIN

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common/ Bureau - Specific	Rules for Creating / Changing & Rules for Administration
Screen Name: Requisition PIIN and Name							
Enter Existing Requisition PIIN	Check the box if the requisition you wish to create is already associated with a Requisition number	Checkbox	No	No	Checkbox	Common Usage	**Rules for Creating / Changing**: If checked, the Document Number fields become a single free-text field. **Rules for Admin:** None
Document Number	Control number that uniquely identifies a Requisition document	3 Segments: Bureau = 8 digits Fiscal Year = 1 digit Counter = 5 digits If the "Existing" checkbox is checked, this field is a 25-digit alphanumeric field, but the standard format should be used.	No	Yes	AABB0444600112	Common Usage	Rules for Creating / Changing: Select fiscal year from drop-down list for the year of the requisition. Fiscal year that the first obligation is planned. Counter is system-generated. **Rules for Admin:** Bureau codes maintained at bureau level.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau - Specific	Rules for Creating / Changing & Rules for Administration
Document Name	A unique name with the requisition document.	30 characters (defaults to document number if not changed)	Yes	Yes	AABB0444600112	Bureau-specific	**Rules for Creating / Changing**: If the field is left blank, document number defaults. Document name is not transferred to CSTARS or CFS. Shows up in the Customer Worksheet. NOAA - will use default (document number) NIST - will make recommendation Census - interested as a potential information field. **Rules for Admin:** None

Screen Name: Requisition Administration / Administration Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Administration **Administration Tab**							
Requisition Number	Control number that uniquely identifies a Requisition document	Defaults from Above (cannot be changed)	No	Yes	AABB0444600112	Common Usage	**Rules for Creating / Changing**: The Requisition number defaults from the document number. The document number is established on the Requisition PIIN and Name screen. This field is read only. **Rules for Admin:** None
Requisition Name	Defaults from Requisition number	Defaults from above (can be changed)	Yes	Yes	Use varies	Bureau Specific	**Rules for Creating / Changing**: If the field is left blank, Document Number defaults. Document name is not transferred to CSTARS or CFS. Shows up in the Customer Worksheet. NOAA - will use default (Document number) NIST - will make recommendation Census - interested as a potential information field **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Requisition Date	The date the Purchase Request was started.	Defaults to Today's Date (can be changed)	No	Yes	Use the date the requisition is initiated.	Common Usage	**Rules for Creating / Changing**: Let the system default. **Rules for Admin:** None
Form (Form Output)	The form the requisition will eventually print on.	**Options:** GSA Standard	No	Yes	Drop-Down List Standard Req.	Common Usage	**Rules for Creating / Changing**: Only selection available. **Rules for Admin:** None
Delivery Date	The date entered by the customer to indicate when the products or services are requested to be delivered.	Enter Delivery Date or use Calendar option	No	Yes	3/12/2006	Common Usage	**Rules for Creating / Changing**: Not recommended to use today's date except in case of emergency or high official request. No backdating. **Rules for Admin:** None
Requesting Office	The office in which the customer requesting the resources resides.	Drop-Down List	Yes	Yes	Drop-Down List Organization Code or Office Code	Common Usage	**Rules for Creating / Changing**: Defaults to the home office based on the user profile office setting, but can be changed. **Rules for Admin:** Changes are made to the user profile to change home office by bureau.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Point of Contact	The person to be contacted regarding this requisition.	61 alphanumeric characters	Yes	Yes	Jan Dodi, Jerry Rorstrom-Lee	Common Usage	**Rules for Creating / Changing**: Defaults to the user name in the user profile of the person creating the requisition. Can be changed. First name and last name. **Rules for Admin:** None
POC Phone (Point of Contact)	Telephone number for the person named as POC	80 alphanumeric characters	Yes	Yes	Area code and number with extension 301 343 4512	Common Usage	**Rules for Creating / Changing**: Must be entered. Will default from user profile if the number is included (can be changed). **Rules for Admin:** None
Requisition Dept.	The name of customer organizational units internal or external to the bureaus.	20 alphanumeric characters	Yes	No	HUD and NOAA's (BIS)	Bureau Specific	**Rules for Creating / Changing**: NIST has it hidden. **Rules for Admin:** Use by external customers is a future consideration after policy and interagency agreement and issues are resolved.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Project ID	Bureau specific number to identify special efforts, projects, and plans.	50-digit alphanumeric	Yes	No	Varies by bureau	Bureau-Specific	**Rules for Creating / Changing**: Census uses field for IT Projects NOAA uses it for SAM OS uses six digits for COMMITS funding NIST uses for work order number **Rules for Admin:** Only the first nine of the thirty characters is passed to CFS.
Acquisition Plan Name **(Not Used)**	Reserved for future use.	50 alphanumeric characters or Lookup Table	Yes	No	Lookup Table	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None
FSC (Federal Supply Code)	A four-character classification code of all items of supply used by the federal government.	Lookup Table 4 alphanumeric characters	No	No	Lookup Table	Common Usage	**Rules for Creating / Changing**: Should be entered in procurement office. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples- Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
FOB **(Not Used)**	Point at which the government accepts responsibility for delivery. If origin, the govt. assumes cost of shipping and responsibility for the items at vendor's outboard shipping point. If destination, the vendor pays shipping and the government does not accept responsibility until delivery to the final destination.	**Options:** Destination Origin See Schedule	No	No	Drop-down List	N/A	**Rules for Creating / Changing**: The Procurement Office should complete this field. In the end it is a contracting officer's decision. **Rules for Admin:** None
Purpose	A high-level description of the requirement.	2000 alphanumeric characters	Yes	Yes	Suggesting standard approach to language: "Exercising Option CLIN XXXX under Contract Number YYYY for Program Management." "New or existing requirement, Task Order of Mod, Description of item, and additional information required to describe the purpose or the expected results"	Common Usage	**Rules for Creating / Changing**: Consistent use of this field needs to be reinforced in training. NOAA uses the title from the Advanced Acquisition Plan (AAP) list. Possible application by all bureaus. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Subject to Availability of Funds	Funds are not available at the time of this requisition, but may be available in the future.	Checkbox	No	No	Checkbox	Common Usage	**Rules for Creating / Changing**: Decision will be made at the budget approval level. Requisitioner will not check this box until directed. Box can be changed (unchecked). **Rules for Admin:** None
Contract Number	Existing contract number that the requisition is being ordered against or Agency order number against a GSA Contract.	40 alphanumeric characters	Yes	No	Standard format. (DOC, COMMITS) SA130106SE0023 (OS) Prefix varies by bureau.	Common Usage	**Rules for Creating / Changing**: Not used in a new requirement. **Rules for Admin:** Unique internal number. Should re-evaluate at a later date if a different system is used.
Delivery Order Number	Task order number against an existing contract.	30 alphanumeric characters	Yes	No	Internal delivery order number.	Common Usage	**Rules for Creating / Changing**: Not used in a new requirement. **Rules for Admin:** Should re-evaluate at a later date if a different system is used.
Suggested Vendor	A US vendor that is in CCR and has a DUNS number or a foreign vendor with a DUNS number.	Vendor number from Vendor Lookup Table	No	No	Lookup Table - CCR plus others	Common Usage	**Rules for Creating / Changing**: Limited to one vendor. Five exceptions to the CCR **Rules for Admin:** Non-CCR vendors can be added by system administrator

Screen Name: Requisition Administration / Funding Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common/ Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Administration **Tab: Funding Tab**							
Fund Code **(Not Used)**	Not used (COTS system carryover)	4 alphanumeric characters	Yes	No	N/A	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None
Authorized By	The person who can authorize the expenditure of funds in the requesting organization. This is merely a name and not an approval.	Lookup Table 50 alphanumeric characters	Yes	No	Can enter First and Last name as free text or Lookup Table. (Ex Division Chief)	Common Usage	**Rules for Creating / Changing**: Requisitioner can enter a name or select from Lookup Table. NIST and OS are using it. NOAA is not using this field. **Rules for Admin:** Lookup Table consists of any active user, maintained by System Administrator.
Funds Certified By	The administrative officer from the requesting office who verifies funds are available.	Lookup Table 50 alphanumeric characters	Yes	No	Can enter First and Last name as free text or Lookup Table (for example, Division Chief)	Bureau Specific	**Rules for Creating / Changing**: Requisitioner can enter a name or select from Lookup Table. NIST, OS, is using it. NOAA is not using this field. **Rules for Admin:** Lookup Table consists of any active user, maintained by System Administrator.

Screen Name: Requisition Administration / Addresses Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Administration **Tab: Addresses Tab**							
Purchase for	The customer agency or specific group who has the need.	Address Code from Address Lookup Table	No	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: Defaults from user profile, but can be changed. **Rules for Admin:** List maintained by system admin at a bureau level Some of the fields can be pre-filled based on user profile.
Deliver To	The first point of delivery for the goods or services.	Lookup Table 15-digit alphanumeric	No	Yes	Lookup Table Could be a loading dock or direct office.	Common Usage	**Rules for Creating / Changing**: Could be the same as the Purchase for Address. **Rules for Admin:** List maintained by system admin at a bureau level Some of the fields can be pre-filled based on user profile.
Ultimate Destination	The final point of delivery for the goods or service.	Address Code from Address Lookup Table	No	No	Lookup Table	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** List maintained by system admin at a bureau level. Some of the fields can be pre-filled based on user profile.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Contracting Office	The acquisition office providing the procurement services.	Address Code from Address Lookup Table	No	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: This field can be changed from the default. **Rules for Admin:** List maintained by system admin at a bureau level
Supplemental Address Information	Free-text field used differently by each bureau for specific delivery instructions.	100 alphanumeric characters	Yes	Yes	Cannot be left blank. Name and location of final delivery.	Bureau-Specific	**Rules for Creating / Changing**: NIST - (req'd) NOAA - Not used (N/A inserted) Census - (req'd) OS- TBD **Rules for Admin:** System-required field.

Screen Name: Account Summary Detail

Note: NIST Screen presents the data field in a different sequence

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Account Summary Detail							
Bureau Code (2)	2-digit FIPS Code designating the customer bureau	Lookup Table 2-digit numeric	Yes	Yes	04 (Census) 13 (Bureau of Industry and Security-BIS) 14 (NOAA)	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by the system administrator. Values must match CFS.
Fiscal Year (2)	Fiscal year of the money being used.	Lookup Table 2-digit numeric	Yes	Yes	05 (2005) 06 (2006)	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Project (7)	Codes used to assign and track costs associated with specific work efforts.	Lookup Table 7-digit alphanumeric	Yes	Yes	ITRAVEL	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Task (3)	Codes used to assign and track costs associated with specific work efforts. Task codes provide another level of detail to project codes.	Lookup Table 3-digit alphanumeric	Yes	Yes	000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Fund (2)	Code used by the Treasury to assign funds to Federal Departments.	Lookup Table 2-digit numeric	Yes	Yes	33	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Program (9)	Code used by Congress to grant program authority to Federal Departments. Program authority gives each Department the legal authority to spend funds.	Lookup Table 9-digit numeric	Yes	Yes	10100000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Organization (16)	Code used to identify the specific organization that is creating the procurement or finance transaction.	Lookup Table 16-digit alphanumeric	Yes	Yes	1111001510160000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Object Class (8)	Numeric codes assigned to financial transactions to identify the nature of a service or item.	Lookup Table 8-digit alphanumeric	Yes	Yes	24000000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
User Defined (6)	A field that can be used by the bureaus to track miscellaneous accounting transactions on an as-needed basis.	Lookup Table 6-digit alphanumeric	Yes	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: In most cases, the User Defined Field (UDF) will contain six zeros. This is reserved for Finance for CFS purposes. End users should not enter anything other than zeroes unless told otherwise by Finance. **Rules for Admin:** This is not a user-defined field. In most cases, the User Defined Field (UDF) will contain all zeros. This is Finance reserved for CFS purposes. This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used.
BOC **(Not Used)**	Defined as Budget Object Class. Currently not used. Displayed only on NIST screen.	8-digit alphanumeric	Yes	No	Free form	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None
Set as Default	A selection box that automatically applies the ACCS to line items.	Checkbox	No	Yes	Checkbox	Common Usage	**Rules for Creating / Changing**: If selected, must enter default percent from (1 to 100%) Applies ACCS code to line items. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Default Percentage	Value from 1 to 100%	Numeric (NNN.NN)	Yes	Yes	50.00, 10.25	Common Usage	**Rules for Creating / Changing**: Must be entered if Default is selected. **Rules for Admin:** None

Screen Name: Requisition Line Item Detail / Administration Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Line Item Detail **Tab: Administration Tab**							
Line Item No. (Requisition)	A unique number that identifies a line item on a requisition	6-digit alphanumeric	Yes	Yes	0001, 0001AA	Common Usage	**Rules for Creating / Changing**: System default that can be changed Every requisition must have at least one line item. If an existing contract, match requisition line item to contract line item number. **Rules for Admin:** None
Qty (Quantity)	The number of products or services required for this line item.	13-digit numeric	Yes	Yes	1, 99	Common Usage	**Rules for Creating / Changing**: Entered by the user **Rules for Admin:** None
UI (Unit of Issue)	The 2-character code for the unit of measurement of the item being purchased.	Lookup Table 2-digit alphanumeric	Yes	Yes	EA (Each) GA (Gallon) HR (Hour)	Common Usage	**Rules for Creating / Changing**: This field is particularly important to cross servicing. Defaults to EA. **Rules for Admin:** C.Request values must match CFS, addressed separately at each bureau. Any values added in C.Request must be added to CFS.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common/ Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Cost	The cost of the product or service per unit of issues.	17-digit numeric	Yes	Yes	1234.55, 1.24	Common Usage	**Rules for Creating / Changing**: Number can be positive or negative. CFS will make negative values zero. **Rules for Admin:** None
Header	A free-text field used differently by each bureau.	2000 characters	Yes	No	Highlight an item, Periods of performance.	Bureau Specific	**Rules for Creating / Changing**: NIST - A string of numbers used for working capital fund amortization. Fed to another system. NOAA - Open to end users CENSUS - Open to end users OS - Not used **Rules for Admin:** None
Description (Requisition)	A brief description that tells procurement what you want. Narrative with description and also may contain justification (what and sometimes the why).	8000 alphanumeric characters	Yes	Yes	The first line or two should contain: "Pens, Ink, Black", "Service, Janitorial, Daily", "Services, IT, Help Desk", "I need secretarial support services from 1 - 30 December" "Exercise Option for Year 2 of Contract Number XXXXXXX" "Support Census Data Collection Infrastructure."	Common Usage	**Rules for Creating / Changing**: If IT, property, or security-related, this should be mentioned in the first few words. Cannot be included as "See Attached. For Options/Mods/Orders, Contact Number must be included early in the description. Description appears on reports. **Rules for Admin:** Training issue.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Not to Exceed	Specifies a ceiling for a line item purchase.	Drop-Down List Options: Cost Quantity Quantity and Cost	No	No	Drop-Down List	Common Usage	**Rules for Creating / Changing**: Related to the line item cost and or quantity. Selected by Requisitioner. **Rules for Admin:** None
Not Separately Priced	A zero-dollar line item that cannot be accepted until all items have been received.	Checkbox	No	No	Checkbox Computers, monitors and keyboards where each is on a separate line item, but you do not want to pay until all are received.	Common Usage	**Rules for Creating / Changing**: Selected by Requisitioner. Must be zero dollars. **Rules for Admin:** None
FSC code (Federal Supply Classification Code) **(Not Used)**	A 4-character classification code of all items of supply used by the federal government.	Lookup Table 4-digit alphanumeric	Yes	No	Lookup Table	N/A	**Rules for Creating / Changing**: Defaults to FSC identified at Admin level. **Rules for Admin:** None
Stock Item	Provides a means of simplifying the ordering process for stock or warehouse items frequently reordered.	Stock Number (29-digit alphanumeric) from Stock Lookup Table	No	No	Lookup Table	Bureau Specific	**Rules for Creating / Changing**: Selected by Requisitioner. Picking a stock item will overwrite the description field and additional text can also be added. **Rules for Admin:** Table is maintained at the bureau level. (NOAA) Could use standard stock numbers such as National Stock Numbers.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common/ Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Project ID	Bureau-specific number to identify special efforts, projects, and plans.	50-digit alphanumeric	Yes	No	Bureau-Specific	Bureau-Specific	**Rules for Creating / Changing**: Defaults from document level data and can be changed. Census uses field for IT Projects. NOAA uses it for SAM uses six digits for COMMITS funding NIST uses for work order number **Rules for Admin:** Only the first nine of the 30 characters are passed to CFS.
Prior Year **(Not Used)**	If checked, indicates funds will come from a prior year.	Checkbox	No	No	Checkbox	N/A	**Rules for Creating / Changing**: Training issue. **Rules for Admin:** None
Fund Code **(Not Used)**	COTS System carryover.	4-digit alphanumeric characters	Yes	No	Not Used	N/A	**Rules for Creating / Changing**: Not used at NOAA or NIST. **Rules for Admin:** None
Receiving Office Number **(Not Used)**	No definition (COTS System Carryover)	8-digit alphanumeric	Yes	No	Not Used	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common/ Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Modification LI Action **(Not Used)**	Not Used	Options: Change Award Line Item Cancel/Cancel Award Line Item Cancel / Open Award Line Item Add Line Item from Base Contract	No	No	Not Used	N/A	**Rules for Creating / Changing**: Should be revisited when reviewing Web versions. **Rules for Admin:** Cannot be grayed out.

Screen Name: Requisition Line Item Detail / Address Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing| & Rules for Administration
Screen Name: Requisition Line Item Detail **Tab: Address Tab**							
Delivery Date (Requisition)	The date entered by the customer to indicate the when the product or services are requested to be delivered.	MM/DD/YYYY	No	Yes	Not recommended to use today's date except in case of emergency or high official request.	Common Usage	**Rules for Creating / Changing**: User can change if a different delivery date is required for this line item. **Rules for Admin:** None
Deliver To	The first point of delivery for the goods or service.	Lookup Table 15-digit alphanumeric	No	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: Defaults from document-level data. Allows changing for specific line item deliver. **Rules for Admin:** List maintained by system admin at a bureau level. Some of the fields can be pre-filled based on user profile.
Supplemental Address Information	Free-text field used differently by each bureau for specific delivery instructions.	100 characters	Yes	Yes	Cannot be left blank. Name and location of final delivery.	Common Usage	**Rules for Creating / Changing**: Defaults from document level. Can be changed for specific line item **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing| & Rules for Administration
FOB (Free on Board)	Point where the government accepts responsibility for delivery. If origin, the govt. assumes cost of shipping and responsibility for the items at vendors outboard shipping point. If destination, the vendor pays shipping and the government does not accept responsibility until delivery to the final destination.	Defaults from FOB entry above (can be changed per CLIN)	No	No	Drop-Down List Destination, Origin, See Schedule	Common Usage	**Rules for Creating / Changing**: The Procurement Office should complete this field. In the end, it is a contracting officer's decision. **Rules for Admin:** Training issue.

Screen Name: Requisition Line Item Detail / Option Tab

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common/ Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Line Item Detail **Tab: Option Tab**							
Option	A designated period of time beyond the base period. Used for services to designate multi-year needs.	Options: Blank Base Period Option Period	No	No	Drop-Down List Blank, Base Period, Option Period	Common Usage	**Rules for Creating / Changing**: Selected by Requisitioner. Used for services only. Base Period - the initial range of time for performance. Option Period - Addition range of time after the base period. **Rules for Admin:** None
Period Begin Date	Base period or optional start date.	MM/DD/YYYY	No	Yes	05/25/2006	Common Usage	**Rules for Creating / Changing**: Required if line item option used. **Rules for Admin:** None
Period End Date	Base period or option end date.	MM/DD/YYYY	No	Yes	05/25/2006	Common Usage	**Rules for Creating / Changing**: Required if line item option used. **Rules for Admin:** None

Screen Name: Accounting Code Detail /
Line Item No: XXXX, Description

Note: NIST Screen presents the data fields in a different sequence.

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Account Summary Detail							
Bureau Code (2)	2-digit FIPS Code designating the customer bureau	Lookup Table 2-digit numeric	Yes	Yes	04 (Census) 13 (Bureau of Industry and Security-BIS) 14 (NOAA)	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by the system administrator. Values must match CFS.
Fiscal Year (2)	Fiscal year of the money being used.	Lookup Table 2-digit numeric	Yes	Yes	05 (2005) 06 (2006)	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Project (7)	Codes used to assign and track costs associated with specific work efforts.	Lookup Table 7-digit alphanumeric	Yes	Yes	ITRAVEL	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Task (3)	Codes used to assign and track costs associated with specific work efforts. Task codes provide another level of detail to project codes.	Lookup Table 3-digit alphanumeric	Yes	Yes	000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Fund (2)	Code used by the Treasury to assign funds to Federal Departments.	Lookup Table 2-digit numeric	Yes	Yes	33	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Program (9)	Code used by Congress to grant program authority to Federal Departments. Program authority gives each Department the legal authority to spend funds.	Lookup Table 9-digit numeric	Yes	Yes	10100000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Organization (16)	Code used to identify the specific organization that is creating the procurement or finance transaction.	Lookup Table 16-digit alphanumeric	Yes	Yes	11110015101600 00	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator
Object Class (8)	Numeric codes assigned to financial transactions to identify the nature of a service or item.	Lookup Table 8-digit alphanumeric	Yes	Yes	24000000	Common Usage	**Rules for Creating / Changing**: This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used. **Rules for Admin:** Lookup Table maintained by system administrator

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
User Defined (6)	A field that can be used by the bureaus to track miscellaneous accounting transactions on an as-needed basis.	Lookup Table 6-digit alphanumeric	Yes	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: In most cases, the User Defined Field (UDF) will contain six zeros. This is reserved for Finance for CFS purposes. End users should not enter anything other than zeroes unless told otherwise by Finance. **Rules for Admin:** This is not a user-defined field. In most cases, the User Defined Field (UDF) will contain all zeros. This is Finance reserved for CFS purposes. This is a segment. The entire ACCS can be imported. Must use appropriate accounting string for the money being used.
Set as Default	A selection box that automatically applies the ACCS to line items.	Checkbox	No	Yes	Checkbox	Common Usage	**Rules for Creating / Changing**: If selected, must enter default percent from (1 to 100%) Applies ACCS code to line items. **Rules for Admin:** None
Default Percentage	Value from 1 to 100%	Numeric (NNN.NN)	Yes	Yes	50.00, 10.25	Common Usage	**Rules for Creating / Changing**: Must be entered if Default is selected. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Allocation By:	Defines how the accounting string is to be applied to the line time.	Options: - Percent - Cost	No	Yes	Drop down List	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** **None**
Percent	The percentage of the line item to which the given ACCS applies.	3 numeric characters	Yes	No	10, 20, 30	Common Usage	**Rules for Creating / Changing**: If "Allocation By" is "Percent" then user enters percentage in this field. The Cost and Quantity of the line item is automatically calculated and displayed for the user. The numbers can be changed and system recalculates based on changes. **Rules for Admin:** **None**
Cost	The dollar amount of the line item to which the given ACCS applies.	Number with decimal	Yes	No	123.50	Common Usage	**Rules for Creating / Changing**: If "Allocation By" is "Cost" then user enters amount in this field. The Percent and Quantity of the line item are automatically calculated and displayed for the user. The numbers can be changed and system recalculates based on changes. **Rules for Admin:** **None**

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Quantity	The number of items to which the given ACCS applies	Numeric	Yes	No	30, 300, 3000	Common Usage	**Rules for Creating / Changing**: Calculated by the system. Can be changed by the user to adjust actual allocation **Rules for Admin: None**

Screen Name: Account Code Lookup

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Account Code Lookup							
Group Name	The project number for associated ACCSs.	Free text	Yes	Yes	NOAA Census	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** Individuals can create and access personalized lists for themselves of Systems Administrators can create groups for a bureau.

Screen Name: Requisition Form Setup

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common/ Bureau - Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Form Setup							
Form	Defaults from form selected earlier.	Drop-Down List **Options:** GSA Standard	No	Yes	Drop-Down List Standard req.	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** None
Line Item Print Options	Additional information that can be selected to print on the document at the line item level.	Options: (all checkboxes) Accounting Codes Cost of Line Item Applied to Account Code Delivery Address Delivery Date FOB Designation Stock Number	No	No	6 options (Accounting code, Cost of Line Item, Delivery Address, Delivery Date, FOB Designation, Stock Number)	Common Usage	**Rules for Creating / Changing**: Prints at line item level. **Rules for Admin:** None
Information (Header Information)	A free-text field that prints before the line headers and line item descriptions.	2000 characters	Yes	No	Free text.	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** Does not pass to CFS, but does pass to CSTARS.

Screen Name: Procurement Notes

C.Request Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Procurement Notes							
Notes (Procurement Notes)	Any additional information that you would like to provide to the acquisition office that you have not had the opportunity to provide.	1000 alphanumeric characters	Yes	No	Additional suggested vendors, Notes to the contracting specialists, Identify Contracting Specialist contacted.	Common Usage	**Rules for Creating / Changing**: This information does not print anywhere, but does appear on the Procurement Notes. **Rules for Admin:** None

Screen Name: Requisition Reviewer Detail

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Requisition Reviewer Detail							
Reviewer Code	3-digit agent code pulled from the user setup. This will vary per bureau and be the people that you need/want to review the requisition.	3-digit Code	No	Yes	Lookup Table	Bureau-Specific	**Rules for Creating / Changing**: Can be edited along the way and previous reviewers are not required by the system to review again. Can be routed as view only to prevent editing. Initiator can add himself or herself as the last person on route so that they receive a notification when the requisition has received final approval. The system will allow preset routing but it is not enforced. **Rules for Admin:** Maintained by bureau system administrator.
Receiving Order	The sequence in which the selected reviewer/approver will get the requisition.	3-digit numeric	Yes	Yes	10, 20, 30	Common Usage	**Rules for Creating / Changing**: The system starts with 10 and increases in increments of 10, but this can be changed. Two or more individuals can have the same sequence number. **Rules for Admin:** None
Priority (Approval Priority Notice) **(Not Used)**	Option that moves the approval action message to the tops of the approver's C.Request inbox.	Checkbox	No	No	Checkbox	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples- Standards	Common / Bureau- Specific	Rules for Creating/ Changing & Rules for Administration
Approval Require and Carbon Copy	Approval Required - Document must be approved before it proceeds on the routing. Carbon Copy - Document will proceed on route regardless approval.	Options: Approval Required Carbon Copy	No	Yes	Radio button	Common Usage	**Rules for Creating / Changing**: **CAUTIONARY NOTE**: Approval is not required by the system prior to Submission. Defaults to "Approval Required". User can change to "Carbon Copy". Carbon Copy still requires an Approve/Disapprove action to remove from inbox. **Rules for Admin:** Training issue.
View Only	Checkbox that allows/prevents reviewers to make changes.	Checkbox	No	No	Checkbox	Common Usage	**Rules for Creating / Changing**: The default is field is unchecked." View only" allows approval/disapproval, but not document editing. If you select "Carbon Copy", View Only defaults. **Rules for Admin:** None

Screen Name: Support Document Detail

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Support Document Detail							
Title (Support Document Title)	Description of support document	40 Alphanumeric	Yes	Yes	Statement of Work, Government Estimate, Sole Source Justification	Common Usage	**Rules for Creating / Changing**: Needs to describe the type of document you are attaching. **Rules for Admin:** None
Group Name **(Not Used)**	Not used	Options: Blank	No	No	Not used	N/A	**Rules for Creating / Changing**: None **Rules for Admin:** None
Description / Comments	A brief summary/explanation of the supporting document.	2000 characters	Yes	No	Statement of Work	Common Usage	**Rules for Creating / Changing**: The support document description flows to CSTARS. **Rules for Admin:** None
Create On	The date the support document was created.	MM/DD/YYYY	No	No	05/25/2006	Common Usage	**Rules for Creating / Changing**: Optional if date tracking is required. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/ No)	Req'd (Yes/ No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Received On	The date the support document was received.	MM/DD/YYYY	No	No	05/25/2006	Common Usage	**Rules for Creating / Changing**: Optional if date tracking is required. **Rules for Admin:** None
Effective On	The date the support document became (or will become) effective.	MM/DD/YYYY	No	No	05/25/2006	Common Usage	**Rules for Creating / Changing**: Optional if date tracking is required. **Rules for Admin:** None
Document Location	The location of the supporting document.	Options: Enter Hardcopy Location Upload Existing File Create New File Using Template	Yes	Yes	Radio button (Enter Hardcopy Location, Upload existing file, Create New File Using Template)	Common Usage	**Rules for Creating / Changing**: Default is Upload Existing File Uploaded files are stored in the database. **Rules for Admin:** None
Path/Filename	The electronic or physical location of the file.	Name & Path of File	Yes (can brow se)	Yes	Free form or browse for file location. C:\Projects\SOW.doc	Common Usage	**Rules for Creating / Changing**: Required for supporting documents. **Rules for Admin:** None

Screen Name: Document Review

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Screen Name: Document Review							
Approve/ Disapprove/ Forward Responsibility	Reviewer action	Radio button	No	Yes	Radio button	Common Usage	**Rules for Creating / Changing**: None **Rules for Admin:** None
To Reviewer	The 3-digit code of the individual that the responsibility is being forwarded to.	3-digit alphanumeric	No	Yes	Lookup Table	Common Usage	**Rules for Creating / Changing**: Required if "Forward Responsibility" is selected. **Rules for Admin:** None
Signature	Password for your electronic signature.	Password	Yes	Yes	Password	Common Usage	**Rules for Creating / Changing**: Signature password must match the signature password in the approver's user profile. Open issue: a policy needs to be issued allowing electronic signatures in lieu of hardcopy signature. **Rules for Admin:** None

C.Request Screen Field Name	Definition	Data Item Format	Free Form (Yes/No)	Req'd (Yes/No)	Examples-Standards	Common / Bureau-Specific	Rules for Creating/ Changing & Rules for Administration
Comments	A text field that contains a message to the Requisitioner explaining reason for disapproval or forwarding.	500 characters	Yes	Yes	Free text.	Common Usage	**Rules for Creating / Changing**: Is required if the requisition and supporting documents are forwarded or disapproved. **Rules for Admin:** None

Section 6: Issue Management

The following pages contain the outstanding requisition issues that need resolution as well as issues that have been resolved for the BRP & Data Standardization Project. Resolution efforts are currently underway for the open issues. Any issues that require resolution by the Program Sponsor (Acquisition Council) will be forwarded accordingly with recommendations.

Each issue is assigned a priority. The priority definitions are:

Critical: If unresolved, could severely impact go-live. Acquisition Council involvement will most likely be required to resolve the issue.

Serious: Will cause some difficulties if not resolved before go-live. Acquisition Council involvement may or may not be required to resolve the issue.

Problematic: Will cause difficulties that can be resolved through continuous improvement after go-live.

Easy: This issue can be resolved before go-live.

Open Issues

Additional C.Request Reporting Requirements

Issue date: **5/23/2006**	Issue submitter: Team

Can we identify needed reporting requirements for acquisition life cycle management?
- What reports can we get out of C.Request (e.g., list of requisitions by Requisitioner, Program Office, or supervisor)?
- There are no ad hoc reporting capabilities at this time. C.Request and CSTARS reporting are limited.
- NIST has created 70-80 reports using Business Objects on top of C.Request and CSTARS.

Solution will involve additional funding for report development and/or additional software.

What type of issue is this?
 X Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   __ Bureau readiness preparation

__ Administer contract process/policy   __ End user training

__ Don't know   X Other (please explain) Performance Metrics

What organization(s) may be impacted?
 X OS   X NIST   X Census   X NOAA   X PTO

Who needs to be involved in developing solution options for this issue?

Bureau representatives

Date by which this issue must be resolved   TBD

Date for follow-up   After October 16, 2007

Issue Priority: __ Critical   _Serious   _X_ Problematic   __Easy

Who should be assigned to manage this issue to resolution? Jerry Rorstrom-Lee

Who needs to make the decision to resolve this issue? TBD

Possible solutions with identification of date solution accepted

Resolved date?	Solution description
	7/6/06 Chris Makris recommended we meet with Dan Alexander to close the loop with CACI regarding the scope of CACI's current efforts with regard to reports.

Year-End Closing for 2007	
Issue date: **5/23/2006**	Issue submitter: Team
How will year-end closing work for "next fiscal year" 07? Is a special process needed? (e.g., on-top-adjustments are used today in the paper process and non-interface documents will continue for several years). How do we take into account year-end closing date? Enforcement with cut off dates (new regulations: Clinger-Cohen) This is a Finance/budget contracting business process issue brought on by C.Request and CSTARS automation. It is complicated so we need to address it early. It is an unknown territory.	

What type of issue is this?
 X Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   __ Bureau readiness preparation

__ Administer contract process/policy   __ End user training

__ Don't know   __ Other (please explain)

What organization(s) may be impacted?
 X OS   X NIST   X Census   X NOAA   X PTO

Who needs to be involved in developing solution options for this issue?

OS and the NIST accounting offices. Now is a good time to talk about this is with John Haglin and John Quick regarding the NIST CFS environment. NOAA finance area (Jon Alexander) needs to be alerted to this issue. Census – Andy Moxam is the issue owner.

Date by which this issue must be resolved   August, 2007
Date for follow-up   TBD

Issue Priority: __ Critical   _ Serious   X Problematic   __Easy

Who should be assigned to manage this issue to resolution? Jerry Rorstrom-Lee

Who needs to make the decision to resolve this issue? Lisa Casias

Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	7/6/06 It was noted during a program review meeting that the HCOs have identified this as a very serious issue, particularly within NOAA. The priority of this issue may need to be raised.

C.Request Data Open Issues	
Issue date: **5/23/2006**	Issue submitter: Team

Project Name: Research needed to see if DOC IT Plan Number can be entered in this field. Could/should this field flow into EARS? **Assigned to:** Jerry Rorstrom-Lee, with support from Dan Alexander and Gary Hill.

Prior Year: What are the business rules to drive use of this field? How and when is it used in C.Request. Does it populate newest version of CSTARS? **Assigned to:** Jerry Rorstrom-Lee.

What type of issue is this?
 X Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   __ Bureau readiness preparation

__ Administer contract process/policy   __ End user training

__ Don't know   __ Other (please explain)

What organization(s) may be impacted?
 X OS   X NIST   X Census   X NOAA   X PTO

Who needs to be involved in developing solution options for this issue? Jerry Rorstrom-Lee

Date by which this issue must be resolved   July 10, 2006
Date for follow-up   ASAP

Issue Priority: __ Critical   X Serious   __ Problematic   __Easy

Who should be assigned to manage this issue to resolution? TBD

Who needs to make the decision to resolve this issue? TBD.

Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	7/6/06 It was recommended during a program review meeting that the DOC IT Plan Number could potentially be used in conjunction with the Acquisition Plan number using a flexible field. This will be investigated. **Document Header** on Print Options screen: Is now in the Data Dictionary. It is not transmitted to CFS or CSTARS **Support Document Description:** Does it flow through to CSTARS? It is an optional field.

Acquisition Planning Data	
Issue date: **5/23/2006**	Issue submitter: Team
What do we really want to recommend for electronic tracking of acquisition plans? Workshop #1 produced a rather extensive list of data. There was an effort in 2005 to do this as well. The current Acquisition Planning project has been deferred.	
What type of issue is this? X Create requisition process/policy __ IT (system name)_____ __ Award contract process/policy __ Bureau readiness preparation __ Administer contract process/policy __ End user training __ Don't know __ Other (please explain)	
What organization(s) may be impacted? X OS X NIST X Census X NOAA X PTO	
Who needs to be involved in developing solution options for this issue? Acquisition planning effort team members	
Date by which this issue must be resolved July 31, 2006 **Date for follow-up** TBD	
Issue Priority: __ Critical _Serious X Problematic __Easy	
Who should be assigned to manage this issue to resolution? TBD	
Who needs to make the decision to resolve this issue? TBD.	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	7/6/06 It was recommended during the project review meeting that this issues and the data Acq. Planning data collected during workshop #1 be compared against the draft Acq Planning Policy. Contractors and Jerry Rorstrom-Lee, Program manager, will pursue this open issue and resolve it before the end of July.

Standardized Number and Level of Approvals	
Issue date: **4/14/2006**	Issue submitter: Greg Coss, Terry O'Bryant

Can we standardize the number and level of approvals required for different kinds of contracts?
In some bureaus, the number of the approval signatures for some types of requisitions is excessive and redundant signatures. This is causing time delays is processing the requisitions. Why 10 when 3 have could be sufficient? What is the optimum achievable level? Requisitioners waste too much time obtaining signatures.

What type of issue is this?

 X Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   X Bureau readiness preparation

__ Administer contract process/policy   X End user training

__ Don't know   __ Other (please explain)

What organization(s) may be impacted?
 X OS   X NIST   X Census   X NOAA   X PTO

Who needs to be involved in developing solution options for this issue?

Requisitioners, HCO, OGC, CO, IG

Date by which this issue must be resolved	August 31, 2006
Date for follow-up	August 10, 2006

Issue Priority: __ Critical   X Serious   __Problematic   __Easy

Who should be assigned to manage this issue to resolution?

Mike Sade, CO for C.Request, COR

Who needs to make the decision to resolve this issue?

Acquisition council and Mike Sade.

Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	7/6/06 It was during the review meeting that the review guidelines are addressed in CAMS as well as on the back of the CD 435.

Standardized Number and Level of Approvals	
	The solution involves developing DOC and/or bureau standardized approval requirements by type of requisition (contract).
	This is a good opportunity, but a team that includes bureau budget staff needs to be commissioned to do the work.
	The solution can be implemented through C.Request using pre-established reviewer/approver routing lists based on the type of requisition and level of funding.
	This is a training issue, especially if there are no standard approval levels established.
	Jerry Rorstrom will lead the solution development effort and provide it to those bureaus that are willing to take this on. Lillian Baston will help. The work to develop a solution includes these activities:
	• Collect all available checklists. NOAA has these checklists in their Acquisition Handbook. NIST has these posted on the Web site. Very important to OS for IT purchases (the nature of the request).
	• Evaluate checklists to establish commonality in approvals levels.
	• In C.Request, allow for multiple selections to be made on approval levels in clicking on "other" option, which allows for additional approval levels and descriptions.

Buy-in For Implementation Success	
Issue date: **4/14/2006**	Issue submitter: Linh Nguyen, John Abbott, Jan Dodi, Bernie

Enterprise-wide trainer training is underway, but there are continuing concerns that those bureaus not already using C.Request will have difficulty in preparing their organizations for go-live, October 16, 2006

The impact on NIST, because of their early exposure to C.Request, will only involve getting Requisitioners to recognize the new C.Request functionality. Other bureaus have to undertake a large scale training effort on all aspects of C.Request as well as common processes.

Training strategy:

NIST lessons learned from CSTARS are being applied to C.Request training. NIST learned that consultant-led training was not as effective as training conducted using internal trainers. Consultants do not know the bureau business processes and cannot be counted on for consistent delivery. Therefore, for C.Request we are using Train-the-Trainer strategy initially to ensure that critical requisition points of contact are trained before go-live. After go-live, training will be open to all Requisitioners as well as those designated as trainers.

- NOAA leads the training effort with Train-the-Trainer sessions kicking off in June. Training materials have been developed and were in final review in May. June 5th is the first date. Census and OS will use the same materials for their Requisitioner training.

- For OS, Crystal Davis is using budget contacts as "power/super users" to train others.

- If Requisitioners don't get trained by go-live, bureaus will train contract specialists first to fill the gap until Requisitioners are trained.

- There are communications issues around how the training will be delivered. Do we need performance targets for training purposes? As of mid-May, NOAA started registration for classes.

Current communications efforts include:

- Briefing acquisition council monthly

- Working directly with ORSI implementation team (weekly)

- Briefing CBS executive board. However, there are issues around access to the board. Some members receive communications informally.

 Bureau policies and practices:

- What are the bureaus doing to document new policies and practices to support the new common process?

Buy-in For Implementation Success

Business readiness:

- All bureaus must work to install the system, establish administrative roles, and prepare user profiles and security levels

- It is not clear what is being done to prepare reviewers/approvers for using C.Request and the changed workflow.

Post go-live performance support:

- It is not clear what mechanisms have been put in place to support Requisitioners in the post go-live environment in each bureau.

What type of issue is this?

_X_ Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   _X_ Bureau readiness preparation

__ Administer contract process/policy   _X_ End user training

__ Don't know   __ Other (please explain)

What organization(s) may be impacted?
_X_ OS   _X_ NIST   _X_ Census   _X_ NOAA   ___PTO

Describe the possible impacts on the organization(s)

Training staff and bureau resources are stretched already.

Who needs to be involved in developing solution options for this issue?

Acquisition/Procurement – Training
Management – Enforcement
Users- Implementing

Date by which this issue must be resolved   October 16, 2006

Date for follow-up   August 31, 2007

Issue Priority: _ Critical   _X_ Serious   __Problematic   __Easy

Who should be assigned to manage this issue to resolution?

Dan Alexander(OS), John Abbott (NOAA), Peter Sefton (Census)

Who needs to make the decision to resolve this issue? TBD

Possible solutions with identification of date solution accepted

Buy-in For Implementation Success	
Resolved date?	Solution description
	7/6/06 The implementation is driven by OMB requirement of A123. This needs to be addressed sooner than noted above.
	Bureaus need to act quickly on this. There are more Requisitioners than we have time to train. Communications and other change management issues must be addressed. Therefore, contingency plans must be developed.

C.Request and CSTARS Electronic Approvals	
Issue date: **4/14/2006**	Issue submitter: Pat Grimes and Debbie Turner

Can C.Request and CSTARS approvals be accepted in lieu of pen and ink signatures? This has been informally done by NIST for several years. Additionally, there has been verbal agreement by the Acquisition Council to this approach. However, an "official" statement in writing from the Council is needed.

What type of issue is this?
 X Create requisition process/policy   __ IT (system name)_____

__ Award contract process/policy   X Bureau readiness preparation

__ Administer contract process/policy   X End user training

__ Don't know   __ Other (please explain)

What organization(s) may be impacted?
 X OS   __ NIST   X Census   X NOAA   ____PTO

Describe the possible impacts on the organization(s)

If the recommended approach is not established officially, some bureaus will continue to revert to paper for signatures. Alternatively, the agency must implement a separate electronic signature system that must be integrated into C.Request and CSTARS.

Who needs to be involved in developing solution options for this issue?

CBS Board and Acquisition Council

Date by which this issue must be resolved   June 15, 2006
Date to follow-up   June 1, 2006

Issue Priority: __ Critical   _X_ Serious   __Problematic   __Easy

Who should be assigned to manage this issue to resolution? Jerry Rorstrom-Lee

Jerry will bring it up to Tom Cochran at the weekly ORSI team meeting. Tom will take the issues to the CBS executive board. John and Dan have brought it up before, so it is not a completely new issue for the CBS Board. Dan and Jerry will bring in to the Acquisition Council to force a resolution to the issue

Who needs to make the decision to resolve this issue? Mike Sade and Acquisition Council

Possible solutions with identification of date solution accepted

C. Request and CSTARS Electronic Approvals	
Resolved date?	Solution description
	7/6/06 Chris Makris recommends that Data Standardization Project Team draft a policy statement so that it can begin the bureau review cycle.
	Recommendation: Memo to enforce CSTARS electronic signatures as "official" signatures.
	When approver in C.Request checks the "approved" box on a request that is routed to him/her, this is an official approval of the requisition and support documents. A signed hard copy is not required.
	Managers will need education on this.

Issues closed

Issues resolved on or before June 1, 2006

CACI demo of version 8.0	
Issue date: **4/14/2006**	**Resolved at Follow-up Workshop**
Can CACI provide a Demo of C.Request Version 8.0?	
Resolution	
CACI delivered version 8.0 to DOC and new screens (look and feel) have been incorporated into training. Additionally, Dan Alexander has offered to demo the new version to anyone who requests it.	

Census and CFS routing enforcement	
Issue date: **4/14/2006**	**Resolved at Follow-up Workshop**
Will Census use C.Request for approvals or use CFS and PM02 approval? C. Request does not "enforce" like CFS. This is a "within" Bureau issue, not department-wide. The question is how funds will be obligated. The CFO wants to obligate funds as a separate step in CFS. Acquisition will do its approvals in C.Request. This CFO step should be transparent to Acquisition. However, ACQ needs to see that this step was taken in CFS without having to go outside C.Request.	
Resolution	
The use of CFS routing is transparent to the Requisitioners who will be using C.Request. Many are already trained on CFS routing so there will be fewer to train. Census will route the requisition package through C.Request. It is only the financial approvals that go through CFS. Fundamentally, CFO/Finance area needs to see Requisition data to update CFS and Acquisition needs to see that the CFS update is done. Ideally, we need one integrated system. ACQ/CFO/Systems (within Census) are working to accomplish the integration.	

Commitment accounting	
Issue date: 4/14/2006	Resolved at Follow-up Workshop

No commitment accounting in place. The C.Request interface with CFS only validates that the ACCS for requisition line items is an existing ACCS, not that it is the appropriate ACCS for that requisition, nor are funds reserved in CFS for the requisition.

NOAA is conducting a pilot program focused on commitment accounting. Pat O'Connor (NOAA) is in charge of Funds Reservation Pilot Program and the pilot. If pilot software program cannot be linked with C.Request, the result is a major duplication/confusion for all involved (NOAA). Duplicate data entry will be required to get data into C.Request. Garry Hill needs to work with Pat O'Connor to see if systems need to be linked.

Resolution

For the BPR and Data Standardization project, this is not an implementation issue. However, this is an ongoing organization issue. The team can be supportive of the effort, but this will not inhibit the go-live for October 16, 2006.

The technology for commitment accounting is in place via CFS, C.Request, and CSTARS. It is not a systems problem, but budgeting issues within the organization. However, DOC does not have the organizational infrastructure to use commitment accounting today. There are budgeting issues within the organization. Program offices are reluctant to commit $ far in advance. Various situations impact commitment and disciplines required for commitment accounting.

Unit of Measure Standard Values	
Issue date: 4/14/2006	Resolved June 1, 2006

What are the standard values for Unit?

C.Request units of measure must match those in CFS or CFS will reject. We need to add any additional UIs to both systems. Default for C.Request is a list of over 750, which is unacceptable.

Resolution

Team collected input from OS, NIST, NOAA, and Census and came to an agreement on a common set of units that match with CFS and all bureaus can live with. The values can be found in Appendix C: Data Values in the Final Report document for 1.0 Create the Requisition.

Ready Requisition Definition	
Issue date: **3/21/06**	**Resolved at Follow-up Workshop**
What is a "Ready Requisition?"	
Resolution	
A ready requisition is a formal term of art. It is defined as a requisition that has all the necessary supporting documents attached to it so solicitation work can begin. Normally, it is the first milestone completion in the planning process. In the new environment, a Ready Requisition is submitted to Procurement through C.Request SUBMIT function.	

Procurement involvement in acquisition planning	
Issue date: **3/21/06**	**Resolved at Follow-up Workshop**
Should Procurement get involved early in 1.1 Plan the requisition?	
Resolution	
The Business Broker concept creates a new role for Procurement in acquisition planning (1.1 Plan the Acquisition and Requisition). Focus is on working collaboratively (Procurement and the Customer Program) to avoid rework downstream as occurs today (e.g., repetitive cycles of Procurement returning Ready Requisitions to customers because of errors, insufficient data, and poorly constructed support documents). DOC has been implementing the Business Broker concept over the past several years, but it has not been adopted consistently across the bureaus. The new common process, 1.0 Create the Requisition, demands that Customers and Procurement work more closely in these early steps of the procurement process. In essence, Procurement as Business Broker becomes involved in the planning process to guide and assist the requisition work.	
The "1.0 Create the Requisition" Report document defines the roles of Procurement and graphically displays them along with the Procurement life cycle (see Section 2: TO BE Processes, Key Innovations).	

Issues Resolved on or before April 10, 2006

Team decision-making

Issue date: 3/20/06	Resolved prior to Requisition Workshop #1

How do we make decisions when we think our bureau management needs to see it first? I need to collect feedback from the NIST MAC group of senior administrators.

Resolution

There will be a 2-week period after the project team members receive the workshop results and the follow-up meeting to finalize the designs. Project team members should schedule review sessions based on the finalized schedule.

- Workshop 1: Process "1.0 Create the Requisition" **(April 10-14)**
- Follow-up workshop: **(May 22-23)**
- Workshop 2: Process 2.0 Award the Contract & 3.0 Administer the Contract **(May 1-5)**
- Follow-up workshop: **(June 19-20)**

The program manager (Jerry Rorstrom-Lee) will also bring this issue up to the Executive Sponsor and each BPO/HCO to ensure review resources are made available.

Original workshop schedule

Issue date: **3/20-21/06**	Issue submitter: Pat Grimes, John Abbott, Dan Alexander

Original schedule for workshops uses up too many resources. Can the ORSI project be delayed until after Oct. 16th? Can other projects be delayed until after Oct. 16th? We must have materials for input to training by mid-April.

Resolution

Acquisition Council approved realignment of priorities and new schedule to ensure deliverables for available by mid-April (Pre-solicitation) and mid-May (Contract Award and Contract Administration). Finalized materials available at start of 4th quarter.

Acquisition Council agreed to support the following:
- Upper and middle management will provide clear visible support
  - Team resources available at the right time.
  - People have been identified and dates set for involvement.
  - <u>We need you to get their calendars cleared!</u>
- Maintain Oct 16 ORSI go-live. Any delay will cost us another year.

Original workshop schedule	
Issue date: **3/20-21/06**	Issue submitter: Pat Grimes, John Abbott, Dan Alexander

All design work must be completed by July 3 (start of 4th quarter)
- The design work will be compressed to meet this date.

Fund travel for field representatives to participate in the project
- OS/OAM may be able to help Census and NOAA bring in field participation

To free up resources for CBE, we need to:
- Delay OS C.Request deployment until October
- Delay RFI (Web) effort until November
- Add CACI support for ORSI project (in progress)

Approval chain enforcement	
Issue date: **4/14/2006**	**Resolved during Requisition Workshop #1**
How do we manage and enforce proper approval chains (e.g., Requisitioner approving his/her own requisitions)	
Resolution	

C.Request does not enforce approval chains. Requisitioner enters the routing he/she needs for the particular requisition.

Policy: Every requisition should be approved at least by one level higher than the Requisitioner. However, there are two notable exceptions:
- When a program manager is the only person in a program and has been officially authorized by his/her management to take on the role of Budget approval and program control approval
- Anyone who has a requisition at or below the micro purchase threshold

Submit and commitment screen functionality	
Issue date: **4/14/2006**	**Resolved during Requisition Workshop #1**
How does the submit screen in C.Request function? How does the commit screen in C. Request function?	
Resolution	

C.Request was demonstrated during the workshop. Anyone with user profile authorization can commit or submit a requisition. There are no system-controlled rules for submission and it is not connected to approvals.

Commit transmits to CFS, which checks that the ACCS is a valid ACCS. It does not "commit" funds (although this feature does exist but is currently turned off). A valid ACCS may be the wrong ACCS for a particular requisition.

Verifying a valid and <u>correct</u> ACCS before requisition approvals is particularly important to cross-servicing programs such as COMMITS and Commercial Law.

Accounting screen drop-down list for ACCS	
Issue date: 4/14/2006	Resolved during Requisition Workshop #1

Are the C.Request accounting screen data items available from a drop-down list?
How do the predefined look-up tables for ACCS commit function?

Resolution
C.Request does not provide drop-down lists for the accounting data items to create a unique ACCS. These items are defined by budget finance. Documentation of these is available to Requisitioners. The Requisitioner must enter the data items. These data items include: Bureau Code, Fiscal Year, Fund, Program, Project, Task, Organization, Object Class, and User Defined.
C.Request does allow the import of existing ACCS strings as an alternative. These strings can be created by the bureau-level system administrator (user with these rights) for bureau use or by an individual for their personal use. Each string in a look-up table(s) is assigned a project ID (Code) (recommended) called a "GROUP NAME". Project IDs can appear multiple times in the same look-up table.

Tracking progress outside of C.Request	
Issue date: 4/14/2006	Resolved during Requisition Workshop #1
How do we track the progress of our requisition once it has gone into the procurement office?	

Resolution
CSTARS, whose users are the procurement office, will transmit status changes to C.Request at the requisition document level. To view the status, the Requisitioner, or any C.Request authorized user, will find the requisition and look under "Related Documents" on the Summary Screen for that requisition.

Routing list enforcement in C.Request	
Issue date: 4/14/2006	Resolved during Requisition Workshop #1
Does C.Request allow bureaus to standardize and require (enforce) certain routing chains for certain types of contracts and dollar amounts?	

Resolution
No. FAR and bureau policy dictate required routing chains that must be enforced through process management by the business.

Use of C.Request >1 year requisitions	
Issue date: **4/14/2006**	**Resolved during Requisition Workshop #1**
How should C.Request be used for major requisitions that will require more than one year before they can be submitted for solicitation?	
Resolution	
The Requisitioner will enter the first year an award is expected in the administrative screen of C.Request when creating the requisition for the first time. For example, if the first award is expected in 2008 and the current year is 06, the fiscal year is 08.	

Problems with requisitions in NOAA Property Mgt Group	
Issue date: **4/14/2006**	**Resolved during Requisition Workshop #1**
Why do NOAA requisitions get routed through Property Management? Some requisitions experience significant delays as that office claims they lost the requisition or never received it.	
Resolution	
NOAA requisitions are routed through the Property Management Office as a method for keeping track of planned purchases, which include equipment that must be inventoried upon arrival. With the introduction of C.Request, the Property Management Office will be selected as a reviewer and approver on the routing list for the requisition and will receive it electronically. If they do not respond, there will be a documented trail for the Requisitioner to follow-up on. This will apply to anyone on a routing list.	

CSTARS implementation with limited budgets	
Issue date: **4/14/.2006**	**Resolved during Requisition Workshop #1**
How will we be able to implement C.Request and CSTARS before Oct. 16th with limited budgets?	
Resolution	
Mr. Mike Sade and the Acquisition Council have mandated the implementation of C.Request and CSTARS. It will go live on October 16th. Bureaus must do whatever is necessary to prepare for the go-live (training and business practice changes) before that time.	

Appendix A: AS IS Processes

Appendix A contains the detailed analysis of the current "1.0 Create the Requisition" sub-processes.

> 1.1 Plan the requisition
> 1.2 Create the requisition
> 1.3 Gather supporting documents
> 1.4 Obtain approvals
> 1.5 Submit requisition

The "1.0 Create the Requisition" process is not linear, as shown in Figure A1 below.
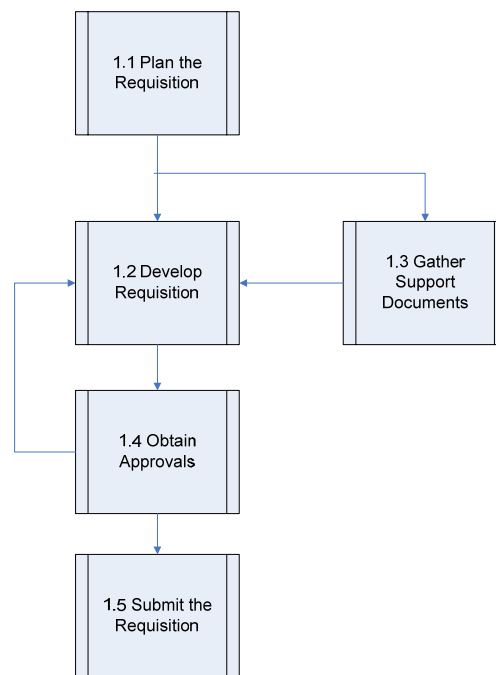
Figure A.1: AS IS Process "1.0 Create the Requisition"

Each sub-process has four versions, one for each bureau. Each sub-process version has a discrete number of steps with defined components consisting of:

- Roles involved in executing the step
- Governing policies and practices that apply to the step
- Exceptions within the bureau for step execution
- Best practices used within the bureau
- Opportunities for improvement of current step execution

1.1 Plan the Requisition

Census: 1.1 Plan the Requisition

Technology: Microsoft Word, MS Project, Electronic CD-435 into CFS

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
Assumption: Acquisition is included in long-term spend plan and budget.					
1. Identify need	Program staff	Procurement Executive Policy and Memorandum, FAR and CAR	None	Get acquisition involved early, budget out as far as possible in advance.	The earlier the better.
2. Define requirements and form acquisition team	Program staff, technical staff, contracting staff	Procurement Executive Policy and Memorandum, FAR and CAR	Simplified acquisition may not need contracting office interaction.	Be performance-based, Be comprehensive (including Life Cycle effort) Be inclusive for team.	Be performance-based.
3. Formulate plan, schedule for acquisition, and update interactively	Program staff, technical staff, contracting staff	Procurement Executive Policy and Memorandum, FAR and CAR	Depends on dollar value.	Be thorough.	Be realistic.
4. Conduct market research	Program staff, technical staff, contracting staff	Procurement Executive Policy and Memorandum, FAR and CAR	Depth of research varies in relation to estimated cost, goods or service being purchased, and level of complexity.	Become Business Brokers, Use PPIRS, GSA Schedule.	None

NIST: 1.1 Plan the Requisition

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Identify need for product/service	Program Requisitioner	Depends on product/service to be procured			Improved procurement planning, earlier acquisition involvement
2. Develop business case and any necessary documentation (includes government estimate, project plan, etc.)	Program Requisitioner, Procurement/ Business Analyst, OCIO	CITRB/CCB Documentation Requirements			
3. Perform market research, if deemed necessary	Program Requisitioner, Contract Specialist	FAR, CAR		Work with Acquisition to generate RFI	
4. Obtain internal/external approvals	Program Requisitioner, Approving Officials	CITRB and/or CCB policies			

NOAA: 1.1 Plan the Requisition

Technology: <u>SAM</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
Enter Requisition Plans into Strategic Acquisition Management database before FY start 1. Primary Contact enters plan 2. Primary Approver approves in Financial Management Center 3. Final Approver approves I Financial Management Center 4. Line office manager approves for Manager 5. Agency Level Manager accepts in Acquisition and Grants Office 6. Selected Acquisition Division accepts plan 7. Team lead accepts plan and assigns to specialist 8. Contract specialist contacts customer and determines milestones 9. Team or Division chief approves milestones 10. Specialist updates milestones at completion. Informs customer	Project managers Component Planning Coordinators Acquisition personnel	NOAA AGO policy DOC and NOAA IT Policy SAM system	Unplanned purchases – last minute input to SAM	Can upload plans via Excel spreadsheet to SAM. Communicate status on procurements to customer via SAM. Have Exhibit 300B completed.	Identify IT requirements and applicable data. Identify personal property info and applicable data, or more generally identify special approval requirements or clearance in system. Line SAM with C.Request and CSTARS. Exhibit 300B – have clearinghouse to get good examples.

OS (Office of the Secretary): 1.1 Plan the Requisition

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
NOTE: For a New Effort: Develop Business Case – Obtain Approval from OSITRB or CITRB – If Approved, then Funds submitted ultimately for Approval by Congress.					
1. Receive funding from Congress for a specific requirement as identify by the program office	(Internal) Program Office	Budgetary Constraint (Apportionment)	N/A		
2. Validate original business case premise (conduct market research)	Program Office/ Contracting (sometimes)	FAR			Adopt Acquisition's Business Broker's program.
3. Develop a project plan	Program Office	Common Business Practices		7 Steps – Performance Based Contracting	

1.2 Develop the Requisition

Census: 1.2 Develop Requisition

Technology: <u>Microsoft Word, Excel, Electronic CD-435 into CFS</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Create Sole Source, Limited Competition or Set-aside Justification	Program staff, technical staff, contracting staff, budget staff	Procurement Executive Policy and Memorandum, FAR and CAR	If it is not a Sole Source, Limited Competition, or Set-Aside Action, this is not required. Micro Purchases have no Competition requirements.	Don't over-explain, just the facts.	None
2. Create Exhibit 300	Program staff, technical staff, contracting staff, budget staff	Procurement Executive Policy and Memorandum, FAR and CAR	Not required for actions under $300K.	Don't over-explain, just the facts.	Improve 300 form

NIST: 1.2 Develop Requisition

Technology: <u>CSTARS (client server C.Request and CSTARS)</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Initiate new requisition in CSTARS	Program/ Administrative Requisitioner	CSTARS User Manual, Designation of Mandatory Data Elements, Designated User Roles (Requisitioner/ Approver)	NTIS, TA, and NIST Boulder EMSS send paper requisitions; subsequently entered by Acquisition clerical staff as a customer requisition.	Electronic requisitioning

Data standardization via system use of mandatory fields | Require all NIST cross serviced customers to use CSTARS electronic requisitioning.

Data format standardization enforcement by the system for certain data fields. |

- Since 2001, requisitioning at NIST has been fully automated (including review & approval)
- Electronic Procurement Status availability

NOAA: 1.2 Develop Requisition

Technology: <u>None</u>

List process steps (5-7)	Who is involved? (roles)	Governing policies & practices	Exceptions to these steps	pest Practices	Opportunities for improvements
1. Meet with Contract Specialist. a. Identify requirements, e.g., approvals, documents needed	PM and Contract Specialist	DOC and NOAA IT Policy FAR, DOC, and NOAA procurement policies		Add IT procurements to planned spending list for IT prior to beginning (identify planning window).	More interaction and regular communication with acquisition office. Define schedule (better use SAM – new system, users need greater experience. Requisition to include 435, supporting Docs and Acquisition Plan. In this respect, 435 is a supporting document (see 1.3)
2. Develop acquisition plan.	PM and Contract Specialist	DOC and NOAA IT Policy FAR, DOC and NOAA procurement policies		Add IT procurements to planned spending list for IT prior to beginning (identify planning window).	More interaction and regular communication with acquisition office. Define schedule (better use SAM – new system, users need greater experience Identify assigned specialist to customer if no meeting held. SAM system communicates to customer when milestones approved. Customer can look in SAM to see assigned specialist but not alert

OS (Office of the Secretary): 1.2. Develop the Requisition (A.K.A. CD 435)

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Go to the DOC Web site and open the CD 435 form.	Program Office	DOC Policy			Go electronic
2. Complete the form.	Program Office	DOC Policy			
3. Submit for approval (Note: With supporting docs).	Program Office	DOC Policy			

1.3 Gather Support Documents

Census: 1.3 Gather Support Documents

Technology: <u>Microsoft Word, Electronic CD-435 into CFS</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Create Statement of Work (SOW)	Program staff, Technical staff, Contracting staff	Procurement Executive Policy and Memorandum, FAR and CAR	Typically, a formal SOW is not created for a straightforward, low-dollar, Simplified Acquisition. In this case, a simple description can be sufficient.	Be performance-based, think in terms of what, not how.	Be more performance-based
2. Identify funds available	Program staff, Budget Staff	Budget Policy	None	None	More Funds Available!!!
3. Aggregate all support documents	Program staff, Budget Staff	Budget Policy	None	None	NA
4. Obtain independent government estimate	Program staff, Technical staff, Contracting staff, Budget staff	Procurement Executive Policy and Memorandum, FAR and CAR			

NIST: 1.3 Gather Support Documents

Technology: <u>CSTARS (client server C.Request and CSTARS), Office Suite, Internal Web site</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Determine what documentation is required	Program/ Administrative Requisitioner, Contract Specialist/ Officer	Acquisition requisition checklist	n/a	Acquisition Web site with requisition checklist, electronic templates for commonly used forms.	n/a
2. Create/Complete support documents	Program/ Administrative Requisitioner	Acquisition requisition checklist; Acquisition website	n/a	Acquisition Web site with requisition checklist, electronic templates for commonly used forms.	n/a
3. Attach support documents to requisition	Program/ Administrative Requisitioner	n/a	n/a	Electronic attachment of support documents	Mandatory use of electronic attachment of support documents.

NOAA: 1.3 Gathering Support Documents

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Prepare Statement of Work	PM Approvals of Directors	FAR, CAR, NOAA acquisition policy DOC and NOAA IT policy		Find good examples to base document – cut and paste Find Web sites to cut and paste verbiage, especially technical.	Create library of SOWs, clearinghouse, templates. Use SAM to identity IT plans for opportunities for sharing resources and identifying contacts.
2. Prepare Sole Source Justification	PM Approvals of Directors	FAR, CAR, NOAA acquisition policy DOC and NOAA IT policy		Avoid Sole Source usage. Conduct market research - needed for justification. Participants in process have adequate training to develop and review documents and understand subject material.	Competition
3. Complete 508 checklist	PM Approvals of Directors	Section 508	Per Section 508, Grants and Interagency transfers	Use 508 compliant products and services.	Streamline process More education about requirements and process Reduce redundancy.

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
4. Prepare requisition	PM Approvals of Directors	FAR, CAR, and NOAA Acquisition Policy	Additional docs may be required depending on requirements and governing policy.	Use previous similar examples. Use fillable Form. Have money in account(s).	Move to C.Request or other Web system and Electronic Signature. Together, these permit electronic routing and approval.

OS(Office of the Secretary): 1.3 Gather Support Documents

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Develop the following documents: • Statement of Work	Program Office	FAR/DOC POLICY			Standardize support documents requirements department-wide.
• Executive Summary	Program Office				
• Justification for other than full and open competition	Program Office /CO	FAR/DOC POLICY			
• Acquisition Waiver – (OCIO and OGC not applicable)	Program Office	DOC POLICY			
• CD 570 – Small Business Set- Aside **(not often used)**	OSDBU	DOC POLICY			
<u>COMMITS/COMMITS NEXGEN</u> Customer Sends a SOW to COMMITS Program Office.	Program Office				
COMMITS Program Office prepares Customer Service Agreement *(sent back to the customer).*	Program Office	COMMITS NEXGEN ORDERING GUIDE			
COMMITS Program Office sends a finalized CSA to NIST.	Program Office/ NIST	COMMITS NEXGEN ORDERING GUIDE			
External Customer sends a MIPR or their form of funding document A.K.A. CD-435 to COMMITS Program Office.	Customer	NIST POLICY REQUEST			

• Assumes this is a new requirement for this sub-process

1.4 Obtain Approvals

Census: 1.4 Obtain Approvals

Technology: <u>Microsoft Word, Electronic CD-435 into CFS</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Conduct SLIC review	IT Division Chiefs, IT Program Staff, CIO, HCO (Census), CIO's Office (DOC)	Departmental and Census Policy	Possibly, Application of this Approval is being revised	None	Complete review of form and application.
2. Conduct hardware review (Census)	IT Division Chiefs, IT Program Staff, CIO, HCO (Census	Departmental and Census Policy	Application of this Approval is being revised	None	Complete review of form and application.
3. Obtain ITGB approvals (Census)	IT Division Chiefs, IT Program Staff, CIO, HCO (Census)	Departmental and Census Policy	CITRB approval at DOC for Life Cycle Costs over 10 Million – Actions could be reviewed at a lower value depending on complexity and contracting vehicle used.	None	Complete review of form and application.
4. Obtain CITRB approval (DOC)	CIO's Office (DOC)	Departmental and Census Policy	CITRB approval at DOC for Life Cycle Costs over 10 Million – Actions could be reviewed at a lower value depending on complexity and contracting vehicle used.	None	Complete review of form and application.

NIST: 1.4 Obtain Approvals

Technology: CSTARS (Client-server C.Request and CSTARS)

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Develop route list in CSTARS	Program/ Administrative Requisitioner	Special Clearance Point Checklist	n/a	Electronic Routing, Special Clearance Points posted on Acquisition Web site	Automated route list based on description/dollar value, etc.
2. Release requisition for approval	Program/ Administrative Requisitioner	n/a	n/a	Electronic approval tracking	n/a
3. Review and Approval	Approving Officials	Depends on requirement (508 compliance, dollar value, etc.).	n/a	Electronic approval tracking	n/a

- Review & Approval status can be viewed by Acquisition staff via a Business Objects Report
- No paperwork is required for this process --- total electronic process
- Routing can be modified as necessary to minimize bottlenecks

NOAA: 1.4 Obtain Approvals

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Obtain Approvals	PM Approvals of Directors	FAR, CAR, and NOAA Acquisition Policy and Line Office Policy		Check funds, codes used, approval routing. Check for additional clearances needed, e.g., property. Accompanying documents are complete and reviewed prior to submission for approval.	Move to C.Request or other Web system. Electronic Signature Together these permit electronic routing and approval. Streamlining – may be too many layers of approval.

OS (Office of the Secretary): 1.4 Obtain Approvals
Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
Approval Program runs concurrently with 1.3. **<u>INTERNAL</u>** **<u>The following are examples only; however, we believe that they are a reasonable representation of the Office of Secretary approval process.</u>**					To eliminate potential anti-deficiency violations.
(OAS)– 2 approvals are required (1) Program Office approves then submits to their internal budget office for review of fund cite (ACCS string – program funding, also reviews for accuracy) (concurrence – assigns requisition number for tracking) (2) Director of OAS for final Approval anything over $10,000. (3) Goes to OEB step (A) – Approves funding on document.	Program Office Office of Executive Budget	Internal OS Policy Internal OS Policy			
OCIO: • The program office calls for a string of acct, requisition number, submits the form for initial, which formally indicates that the form is accurate and that funding is available. • The form is then forwarded to the Deputy OCIO for approval. • If approved and greater then $10,000, form is forwarded to OEB. Go to STEP (A).					

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
<u>EXTERNAL:</u> (A) OEB stamps the form, signs the form, makes a copy of the form. *(NOTE: OEB is not vested by Treasury Dept to Certify Funds legally; however, they approve the use of the funds and cite that it fits within the approved budget).*					

1.5 Submit Requisition to Procurement

Census: 1.5 Submit Requisition to Procurement

Technology: <u>Microsoft Word, Electronic CD-435 into CFS</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Create CD 435	Sponsoring staff, Budget staff	Census Bureau mandated business rules	None	None	None
2. Requisition approved via local approval Change, depending on type and amount of money.	Program staff, Budget staff	Census Bureau mandated business rules	None	None	ORSI
3. Requisition approved via CFS enforced approval chain	Sponsoring staff, Budget staff	Census Bureau mandated business rules	None	None	None

NIST: 1.5 Submit Requisition to Procurement

Technology: <u>CSTARS (Client server C.Request and CSTARS)</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Ensure all necessary approvals have been obtained	Requisitioner		n/a	Electronic routing/approval (requirements are routed back to Requisitioner as the last person on the route list)	System notification that all approvals have been obtained
2. Electronically submit requisition to acquisition	Requisitioner or Admin Officer		n/a	Automated tracking/status for Requisitioner	Automated validations (funds availability/ACCS validation) at time of submittal. System should not allow submittal if all approvals have not been obtained.

NOAA: 1.5 Submit Requisition to Procurement

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Physically provide requisition and supporting documents to Acquisition (may e-mail also)	PM CO Admin CO	FAR, CAR, and NOAA Acquisition Policy and Line Office Policy		Provide all documents electronically.	Provide documents via Web requisitioning system.
2. Acquisition logs in document at acquisition office	PM CO Admin CO	FAR, CAR, and NOAA Acquisition Policy and Line Office Policy			

OS (Office of the Secretary): 1.5 Submit Requisition to Procurement

Technology: <u>None</u>

Sub-process steps	Who is involved?	Governing policies & practices	Exceptions	Best practices	Opportunities for improvements
1. Once CD 435 package has been approved and stamped by OEB, it is hand-carried to CAS for physical documented receipt	Program Office & CO	Acquisition Community development guide	Deliver directly to your favorite contracting officer and secure a date for contract delivery.	Follow the CAS developed guides.	Implement the electronic requisition tracking system better known as ORSI-C.Request. Have contracting specialist call Requisitioner when he/she receives a requisition and keep Requisitioner in the loop on the progress or lack of progress of the requisition status on a weekly basis.

Appendix B: Data Element Values

Unit of Measure Standard Values

The following values are the ORSI-compatible ordering unit codes for C.Request, CSTARS, and CFS. The CFS system does not accept numeric designations for unit code via ORSI; therefore, those units with numeric designations have new/changed values. All new or changed values from the list provided previously are designated with an asterisk.

#	Unit Nomenclature and Associated Crosswalk Code		
	Current	Current Code Designation	As Agreed
1	Group	10	GP*
2	Outfit	11	OT*
3	Packet	12	PE*
4	Ration	13	RA*
5	Shot	14	SX*
6	Stick	15	SZ*
7	Ball	AA	AA
8	Ampoule	AM	AM
9	Assortment	AS	AS
10	Assembly	AY	AY
11	Bale	BA	BA
12	Bundle	BD	BD
13	Board Foot	BF	BF
14	Bag	BG	BG
15	Bar	BI	BI
16	Book	BK	BK
17	Bolt	BM	BM
18	Bottle	BO	BO
19	Barrel	BR	BR
20	Box	BX	BX
21	Case	CA	CA
22	Carboy	CB	CB
23	Carats	CD	CD
24	Cubic Foot	CF	CF

#	Unit Nomenclature and Associated Crosswalk Code		
	Current	Current Code Designation	As Agreed
25	Container	CH	CH
26	Cone	CJ	CJ
27	Cylinder	CL	CL
28	Can	CN	CN
29	Cartridge	CQ	CQ
30	Cubic Meter	CR	CR
31	Carton	CT	CT
32	Coil	CX	CX
33	Cubic Yard	CY	CY
34	Days	DA	DA
35	Mile	DH	DH
36	Drum	DR	DR
37	Dozen	DZ	DZ
38	Each	EA	EA
39	Thousand Cubic Feet	F1	TC*
30	Feet	FT	FT
31	Gallon	GA	GA
32	Gram	GR	GR
33	Hour	HR	HR
34	Hundred	HU	HU
35	Inch	IN	IN
36	Job	JB	JB
37	Jar	JR	JR
38	Cake	KA	KA
39	Kilogram	KG	KG
40	Kit	KT	KT
41	Pound	LB	LB
42	Linear Foot	LF	LF
43	Length	LN	LN
44	Lot	LO	LO
45	Liter	LT	LT
46	Milligram	ME	ME

#	Unit Nomenclature and Associated Crosswalk Code		
	Current	Current Code Designation	As Agreed
47	Milliliter	ML	ML
48	Month	MO	MO
49	Meter	MR	MR
40	Ounce	OZ	OZ
41	Piece	PC	PC
42	Pad	PD	PD
43	Package	PK	PK
44	Pair	PR	PR
45	Pint	PT	PT
46	Quarter	Q1	QR*
47	Meal	Q3	MA*
48	Quart	QT	QT
49	Reel	RE	RE
50	Roll	RL	RL
51	Ream	RM	RM
52	Square Feet	SF	SF
53	Sheet	SH	SH
54	Spool	SO	SO
55	Strip	SR	SR
56	Set	ST	ST
57	Skid	SV	SV
58	Skein	SW	SW
59	Square Yard	SY	SY
60	Tube	TB	TB
61	Thousand	TH	TH
62	Ton	TN	TN
63	Troy Ounce	TO	TO
64	Vial	VI	VI
	New values required		
65	YEAR		YR*
66	LUMP SUM		LS*
67	WEEK		WK*

#	Unit Nomenclature and Associated Crosswalk Code		
	Current	Current Code Designation	As Agreed
68	TASK		TK*
69	CONTRACT		KO*
70	MINUTES		MN*
71	Report		RP*
72	Plate		PL*
73	Labor Hours		LH*
74	License		LC*
75	Disk		DK*
76	Pack		PX*
77	Cube		CU*
78	Millimeter		MM*
79	Pickup (not a truck)		PU*
80	Night		NG*
81	Round Trip		RT*

Product Service Code Standard Values

Code	Description
AXXX	Research and Development
BXXX	Special Studies and Analyses Not R&D
CXXX	Architect and Engineering Construction
DXXX	Automatic Data Processing and Telecommunication
EXXX	Purchase of Structures and Facilities
FXXX	Natural Resources and Conservation
GXXX	Social Services
HXXX	Quality Control, Testing, and Inspection
JXXX	Maintenance, Repair, and Rebuilding of Equipment
KXXX	Modification of Equipment
LXXX	Technical Representative
MXXX	Operation of Government-Owned Facilities
NXXX	Installation of Equipment
PXXX	Salvage Services
QXXX	Medical Services

Code	Description
RXXX	Professional, Administrative, and Management Support
SXXX	Utilities and Housekeeping Services
TXXX	Photographic, Mapping, Printing, and Publications
UXXX	Education and Training
VXXX	Transportation, Travel, and Relocation
WXXX	Lease or Rental of Equipment
XXXX	Lease or Rental of Facilities
YXXX	Construction of Structures and Facilities
ZXXX	Maintenance, Repair, or Alteration of Real Property

Federal Supply Code Standard Values

Code	Description
10XX	Weapons
11XX	Nuclear Ordinance
12XX	Fire Control Equipment
13XX	Ammunitions and Explosives
14XX	Guided Missiles
15XX	Aircraft and Airframe Structural Components
16XX	Aircraft Components and Accessories
17XX	Aircraft Launching/Landing/Ground Handling Equip.
18XX	Space Vehicles
19XX	Ships, Small Craft, Pontoons, and Floating Docks
20XX	Ship and Marine Equipment
22XX	Railway Equipment
23XX	Ground Vehicles, Motor Vehicles, Trailers, Cycles
24XX	Tractors
25XX	Vehicular Equipment Components
26XX	Tires and Tubes
28XX	Engines, Turbines, and Components
29XX	Engine Accessories
30XX	Mechanical Power Transmission Equipment
31XX	Bearings
32XX	Woodworking Machinery and Equipment
34XX	Metalworking Machinery

Code	Description
35XX	Service and Trade Equipment
36XX	Special Industry Machinery
37XX	Agricultural Machinery and Equipment
38XX	Construction, Mining, Excavating, Highway Maintenance
39XX	Materials Handling Equipment
40XX	Rope, Cable, Chain, and Fittings
41XX	Refrigeration, Air Conditioning Equip.
42XX	Fire Fighting, Rescue, and Safety Equipment
43XX	Pumps and Compressors
44XX	Furnace/Steam Plant/Drying Equip., Nuclear Reactors
45XX	Plumbing, Heating, and Sanitation Equipment
46XX	Water Purification and Sewage Treatment Equipment
47XX	Pipe, Tubing, Hose, Fittings
48XX	Valves
49XX	Maintenance and Repair Shop Equipment
51XX	Hand Tools
52XX	Measuring Tools
53XX	Hardware and Abrasives
54XX	Prefabricated Structures and Scaffolding
55XX	Lumber, Millwork, Plywood, and Veneer
56XX	Construction and Building Materials
58XX	Communications, Detection, and Coherent Radiation
59XX	Electrical and Electronic Equipment Components
60XX	Fiber Optics Materials and Components
61XX	Electric Wire, and Power and Distribution Equipment
62XX	Lighting Fixtures and Lamps
63XX	Alarm, Signal, and Detection Systems
65XX	Medical, Dental, and Veterinary Equipment
66XX	Instruments and Laboratory Equipment
67XX	Photographic Equipment
68XX	Chemicals and Chemical Products
69XX	Training Aids and Devices
70XX	ADP Equipment Software, Supplies, Equipment
71XX	Furniture

Code	Description
72XX	Household/Commercial Furnishings and Appliances
73XX	Food Preparation and Serving Equipment
74XX	Office Machines
75XX	Office Supplies and Devices
76XX	Books, Maps, and Other Publications
77XX	Musical Instruments
78XX	Recreational and Athletic Equipment
79XX	Cleaning Equipment and Supplies
80XX	Brushes, Paints, Sealers, and Adhesives
81XX	Containers, Packaging, and Packing Supplies
83XX	Textiles/Leather/Furs/Apparel/Shoes/Tents/Flags
84XX	Clothing, Individual Equipment, and Insignia
85XX	Toiletries
87XX	Agricultural Supplies
88XX	Live Animals
89XX	Subsistence (Food)
91XX	Fuels, Lubricants, Oils, and Waxes
93XX	Nonmetallic Fabricated Materials
94XX	Nonmetallic Crude Materials
95XX	Metal Bars, Sheets, and Shapes
96XX	Ores, Minerals, and Their Primary Products
99XX	Miscellaneous