



# CBE BPR and Data Standardization Project

## 1.0 Create the Requisition (Pre-solicitation)

### Workshop Results Document



## Table of Contents

<b>Introduction</b>	<b>1</b>
Document Purpose	1
Participants	2
Methodology	2
Results Document Structure	3
Implementation of Common Processes and Standard Data	4
Next Steps	5
<b>Section 1: AS IS Processes</b>	<b>6</b>
Similarities and Differences	6
AS IS Process Decomposition	7
1.1 Plan the Requisition	9
1.2 Develop the Requisition	14
1.3 Gather Supporting Documentation	19
1.4 Obtain Approval	25
1.5 Submit Requisition to Procurement	30
<b>TO BE Processes</b>	<b>35</b>
Key Design Innovations	35
TO BE Process Decomposition	36
1.1 Plan the Acquisition and Requisition	37
<i>Process Flow Diagram</i>	37
<i>TO BE Process Forms</i>	38
1.2 Develop Requisition	41
<i>Process Flow Diagram</i>	41
<i>TO BE Process Forms</i>	42
1.3 Gather Supporting Documents	44
<i>Process Flow Diagram</i>	44
<i>TO BE Process Forms</i>	45
1.4 Obtain Approvals and Submit Requisition	47
<i>Process Flow Diagram</i>	47
<i>TO BE Process Form</i>	48
<b>Data Standardization Table of Contents</b>	<b>53</b>
<b>Issue Management</b>	<b>152</b>
<i>OPEN ISSUES</i>	153
Procurement involvement in acquisition planning	153
Unit of Measure Standard Values	154
Commitment accounting	155
Approval Checklists	156



Buy-in for implementation success	157
Census and CFS routing enforcement	158
CACI demo of version 8.0	160
CSTARS electronic approvals	161
<i>Issues closed</i>	<b>162</b>
Team decision making	162
Original workshop schedule	162
Approval chain enforcement	163
Submit and commitment screen functionality	163
Accounting screen pick list for ACCS	164
Tracking progress outside of C.Request	164
Routing list enforcement in C.Request	165
Use of C.Request >1 year requisitions	165
Problems with requisitions in NOAA Property Mgt Group	165
CSTARS implementation with limited budgets	166
C.Request approvals as 'official'	166
<b>Appendix A: Acquisition Planning Data Recommendations</b>	<b>167</b>



## Introduction

### Document Purpose

The materials in this document were developed by the participants at the BPR & Data Standardization workshop held April 10-14, 2006. The workshop addressed the first process in the project, 1.0 Create the Requisition which includes the implementation of C.Request, automation support tool (Figure 1). The last two processes, 2.0 Award the Contract and 3.0 Administer the Contract and the use of the C.Buy software tool will be addressed in the workshop scheduled for May 1-5.

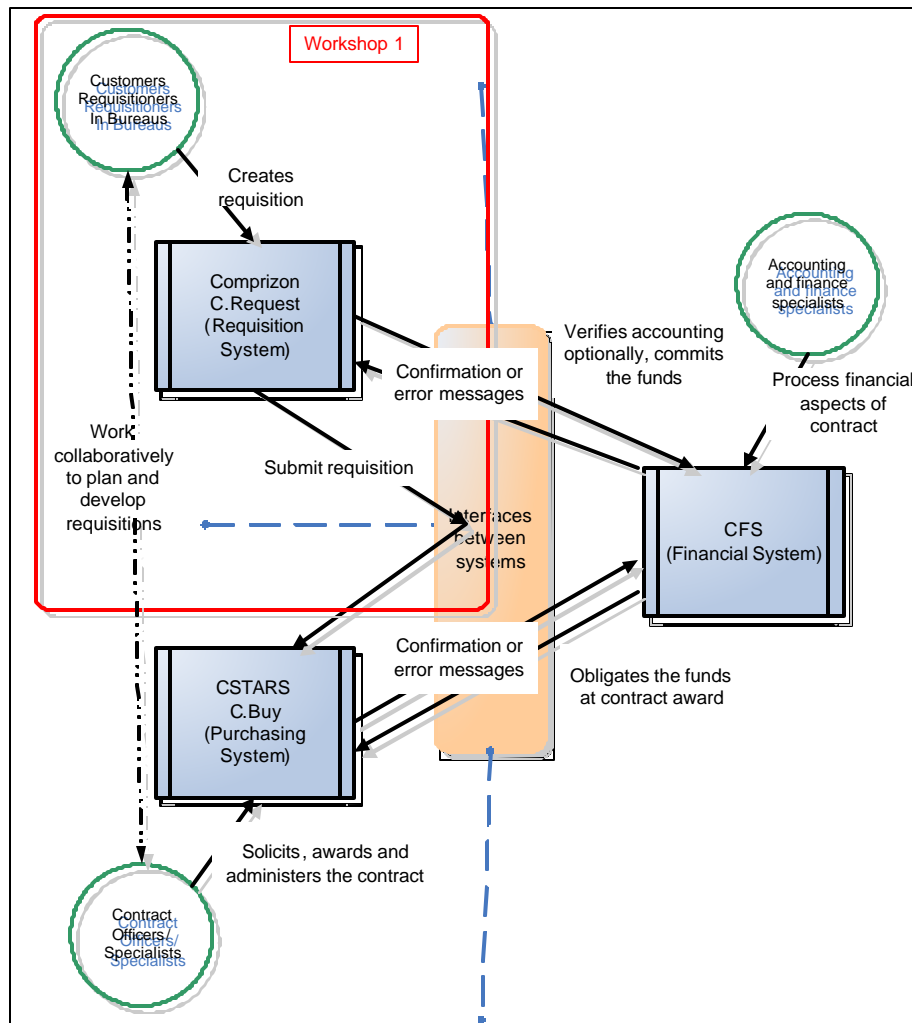


Figure 1: BPR & Data Standardization Project Scope



## **Participants**

Workshop participants represented the bureaus impacted by the project and policy 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 O'Dell
- Randy Hill

### 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
- Gary Hill

## **Methodology**

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

The BPR and data standardization work is divided into phases as depicted in figure 2. Phase 1 covers 1.0 Create the Requisition and Phase 2 covers 2.0 Award the Contract and 3.0 Administer the Contract. In each phase, the following activities are completed:

- A common process design and standardize data is developed through a one week workshop facilitated by the RWD contractor, an unbiased 3<sup>rd</sup> party and attended by the project core team and representatives for each of the impacted bureaus (NOAA,



NIST, OS and Census).

- A “Results Document” is assembled by the contractor and distributed to bureau representatives within two weeks after the workshop.
- In the bureaus, there is approximately two weeks for document review and feedback gathered by the bureau representatives.
- After this review, workshop participants reconvene in a two day follow-up workshop to finalize the designs and standardization, propose performance metrics, and explore implementation best practices.
- The final “Results Document” is distributed within two weeks after the follow-up workshop.

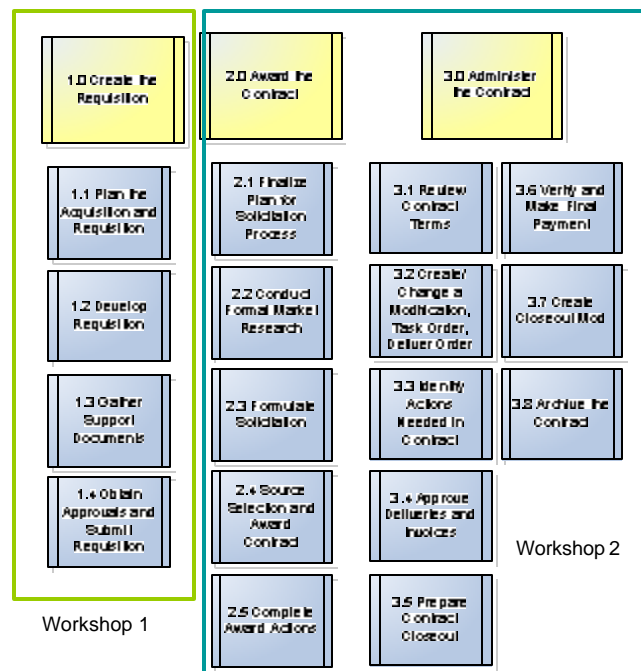


Figure 2: Workshop Coverage

## Results Document Structure

The document is divided into the following sections:

### Section 1: AS IS Processes

This section contains a description of the current requisition environment for the Department of Commerce. Similarities and differences among the four participating bureaus are highlighted along with bureau level process documentation.

## **CBE BPR & Data Standardization**

### **1.0 Create the Requisition**



#### **Section 2: TO BE Processes**

The section defines the recommended common process and sub-process for *1.0 Create the Requisition* that all bureaus should be able to implement. There is a summary of recommendations, a revised process flow along with sub-process flow diagrams, and detailed process documentation.

#### **Section 3: Data Standardization**

This section defines data, standard values where appropriate, and its usage within the C.Request system. The data includes that which is passed via interfaces to CFS or C.Buy. There are some 80 data elements, organized by screen, which are documented within this section. There are 8 data items still under examination at this time. The Program Manager, Jerry Rorstrom-Lee is pursuing their resolution.

#### **Section 4: 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 are documented in a standard format which the severity of the issue, who needed to be involved in resolution development and decision making and a date by when the issue must be resolved.

#### **Appendix**

During the requisition workshop, participants brainstormed data for automation to support Acquisition Planning (1.1 Plan the Acquisition and Requisition). The results have been structured by the contractor into a preliminary set of data requirements that can be used as input for software tool evaluation. [This documentation will be sent out on or before May 15, 2006].

## **Implementation of Common Processes and Standard Data**

The implementation of common processes and standard data across the Department of Commerce may be somewhat reinforced through the use of the new web-based requisition system, C.Request. However, the C.Request system has a lot of flexibility which inhibits the automated reinforcement. Therefore, much of the common processes implementation will become the responsibility of DOC and bureau management who will need to provide supportive policies, practices, and performance management.

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. Core Team Process Owners will work with each bureau's leadership to reinforce the continued application of standard processes. The more common the DOC procurement processing, systems and data across the bureaus, the



## CBE BPR & Data Standardization

### 1.0 Create the Requisition



easier it is for everyone in the Department of Commerce to support cross serving and produce speedy and effective requisition processing.

### Next Steps

For the requisition process (1.0 Create the Requisition) the next steps and milestone dates are:

- **May 1 - 19:** Upon receipt of this document, bureau representatives meet with appropriate bureau management and subject matter experts to review and gather feedback. Bureau feedback is documented on the appropriate pages of a single copy of the "Create the Requisition Workshop Results Document" and brought to the follow-up workshop.
- **May 22-23:** Workshop participants reconvene in a two day follow-up workshop to finalize the designs and standardization, propose performance metrics, and explore implementation best practices.
- **June 6:** Final "1.0 Create the Requisition Workshop Results Document" will be delivered to DOC leadership and bureaus to support implementation.

For the contract award and administration processes (2.0 Award the Contract and 3.0 Administer the Contract), we expect a more challenging effort due to the increased scope of the processes, the increased amount of data requiring standardization, and the lack of a new system to drive communization (C.Buy is an existing system, but the ORSI interface is new). The steps and milestone dates for this work includes:

- **April 18-28:** Selected representatives from the bureaus have been asked to document the AS IS process environment with materials provided by the contractor.
- **May 1-5:** A five-day workshop to develop the common processes and standardize data.
- **May 30-June 16:** Upon receipt of the workshop results titled, "Award and Administer the Contract Workshop Results Document", bureau representatives meet with appropriate bureau management and subject matter experts to review and gather feedback. Bureau feedback is documented on the appropriate pages of a single copy of the document and brought to the follow-up workshop.
- **June 19-20:** Workshop participants reconvene in a two day follow-up workshop to finalize the designs and standardization, propose performance metrics, and explore implementation best practices
- **July 10:** Finalized "Award and Administer the Contract Workshop Results Document" will be delivered to DOC leadership and bureaus to support implementation.





## 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 was then used in creating the “TO BE” processes. The team focused on carrying the best practices forward, while eliminating current process obstacles and bottlenecks.

### Similarities and Differences

At the completion of the AS IS process review, the bureau representatives agreed that for the most part, they follow similar steps when creating a requisition. There are certainly bureau differences that are driven by bureau policies, present day technical infrastructure, the bureau cultural history, and the nature of the procurements that each bureau makes.

The implementation of a common IT infrastructure will go a long way to standardizing processes. They found that all bureaus:

- Create requisitions.
- Provide a variety support documentation (electronic and/or physical) with their requisitions
- Conduct 508 research in some form, although not consistently. This is an example of supporting documentation which depends upon the type of contract that will result.
- Involve the procurement office in requisition process to some degree.
- Follow a basic flow of process for requisitions where the process of gathering support documentation can span planning and developing the requisition.
- Go through some kind of funding approval before requisition 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.

**Table 1: Bureau Differences**

	Census	NIST	NOAA	OS
Bureaus use different systems and methodologies for acquisition planning. NOAA has the Acquisition Plan Acceptance System (SAMS), and routes the requisition plan to itself for approval.	Manual	Manual	SAMS	Manual
Majority of OS uses the Acquisition Waiver for actions over \$100,000. Other Bureaus do not.				✓
NOAA requires certain types of requisitions go				

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



	Census	NIST	NOAA	OS
through property management to identify accountable property. (o/c 23XX, 25XX, 26XX, 31XX)			✓	
NIST uses an interface from CSTARTS to Oracle Fixed Assets for accountable property control at award.		✓		
Bureaus use CD435 in different formats.	Elect.	Hard Copy	Elect.	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. Both NIST and Census do approval routing electronically while OS and NOAA have a hardcopy approval.	✓			
OS requires external approval (OEB) before submissions for contracts \$100K or higher.				✓
Census has an extended approval chain which is CFS driven and enforced.	✓			
All NIST requisitions are electronically transmitted to the procurement office.		✓		
Census uses the simplified acquisition system (CSPS, part of CSTARTS) to route requisition electronically to procurement. However, the contract has to be re-entered into CSTARTS (C.Buy), after it is received.	✓			

**AS IS Process Decomposition**

The following pages contain the decomposition of the current sub-processes used by each bureau. To allow for easier comparison of existing activities across bureaus, the documented forms are grouped by sub process:

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

These processes are not linear as shown in Figure 3 below.

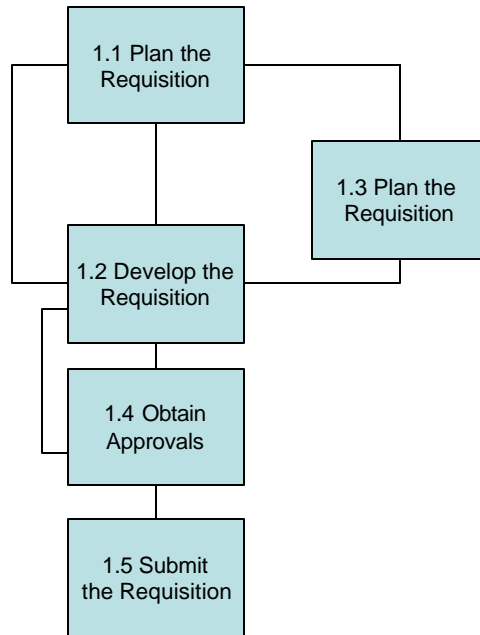


Figure 3: AS IS Process 1.0 Create the Requisition

On each form, the sub-process id decomposed into 5-7 steps, where applicable, and each step has the following information associated with it:

- The roles involved in executing the step
- The governing policies and practices that govern 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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.1 Plan Requisition**

Bureau: **Census** Workshop Participants: Peter Sefton, Greg Coss, Jerry Rorstrom-Lee Technology: Microsoft Word, MS Project, Electronic CD-435 into CFS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Assumption: Acquisition is included in long-term spend plan and budget.	Program staff	Procurement Executive Policy and Memorandum, FAR and CAR	None	Budget out as far as possible in advance	The earlier the better
2. Identify need	Program staff	Procurement Executive Policy and Memorandum, FAR and CAR	None	Getting acquisition involved early, budget out as far as possible in advance	The earlier the better
3. 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
4. Formulate plan and 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
5. 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.	Become Business Brokers, Use PPIRS, GSA Schedule....	None

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.1 Plan the Requisition**

Bureau: **NIST**

Workshop Participants: Debbie Turner/Pat Grimes

Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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 gov't 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			

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.1 Plan the Requisition**

Bureau: **NOAA**      Workshop Participants: John Abbott, Jan Dodi, Bernee Foreman, Lori Batson, Lillian O'Dell      Technology: SAMS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
<p>Enter Requisition Plans into Strategic Acquisition Management database before FY start.</p> <ol style="list-style-type: none"> <li>1. Primary Contact enters plan</li> <li>2. Primary Approver approves in Financial Management Center</li> <li>3. Final Approver approves I Financial Management Center</li> <li>4. Line office manager approves for Manager</li> <li>5. Agency Level Manager accepts in Acquisition and Grants Office</li> <li>6. Selected Acquisition Division accepts plan</li> <li>7. Team lead accepts plan and assigns to specialist</li> <li>8. Contract specialist contacts customer and determines milestones</li> <li>9. Team or Division chief approves milestones</li> <li>10. Specialist updates milestones at completion. Informs customer.</li> </ol>	<p>Project managers Component Planning Coordinators Acquisition personnel</p>	<p>NOAA AGO policy DOC and NOAA IT Policy SAM system</p>	<p>Unplanned purchases - last minute input to SAM</p>	<p>Can upload plans via excel spreadsheet to SAM Communicate status on procurements to customer via SAM Have Exhibit 300B completed</p>	<p>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</p>



**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.1 Plan the Requisition**

Bureau: **Office of the Secretary** Workshop Participants: Tim, Linh, Terry, Dan, Frank Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.2 Develop Requisition**

Bureau: Census Workshop Participants: Peter Sefton, Greg Coss, Jerry Rorstrom-Lee Technology: Microsoft Word, Excel, Electronic CD-435 into CFS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Create Sole source justification	Program staff, technical staff, contracting staff, budget staff	Procurement Executive Policy and Memorandum, FAR and CAR	If it is not a Sole Source Action this is not required, Micro Purchases have no Competition requirements,	Don't over explain, just the facts	None
2. Create 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 Limited Competition or Set-Aside Action this is not required, Micro Purchases have no Competition requirements,	Don't over explain, just the facts	None
3. Create Exhibit 300	Program staff, technical staff, contracting staff, budget staff	Procurement Executive Policy and Memorandum, FAR and CAR	Not required for actions under \$300,000	Don't over explain, just the facts	Improve 300 form

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.2 Develop Requisition**

Bureau: **NIST**

Workshop Participants: Debbie Turner, Pat Grimes

Technology: CSTARS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.2 Develop Requisition**

Bureau: **NOAA** Workshop Participants: John Abbott, Jan Dodi, Bernee Foreman, Lori Batson, Lillian O'Dell Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Meet with Contract Specialist <ul style="list-style-type: none"> <li>a. Identify requirements, e.g,</li> <li>b. Approvals</li> <li>c. Documents needed</li> </ul>	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 no alert

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: 1.2. Develop the Requisition (A.K.A. CD 435)

Bureau: Office of the Secretary Workshop Participants: Tim, Linh, Terry, Dan, Frank Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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 Supporting Documentation



**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.3 Gather Supporting Documents**

Bureau: Census Workshop Participants: Peter Sefton, Greg Coss, Jerry Rorstrom-Lee Technology: Microsoft Word, Electronic CD-435 into CFS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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 straight forward 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 supporting documentation	Program staff, Budget Staff	Budget Policy	None	None	NA
4. Obtain IGE	Program staff, technical staff, contracting staff, budget staff	Procurement Executive Policy and Memorandum, FAR and CAR			

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.3 Gather Supporting Documentation**

Bureau: **NIST**

Workshop Participants: Debbie Turner, Pat Grimes

Technology: CSTARS, Office Suite, Internal Website

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Determine what documentation is required	Program/ Administrative Requisitioner, Contract Specialist/ Officer	Acquisition requisition checklist	n/a	Acquisition Website 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 Website 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.

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.3 Gathering Supporting Documents**

Bureau: **NOAA** Workshop Participants: John Abbott, Jan Dodi, Bernee Foreman, Lori Batson, Lillian O'Dell Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Preparing 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 identify 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
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 Electronic Signature Together these permit electronic routing and approval

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.3 Gather Supporting Documents (Assumption = New Requirement)**

Bureau: **Office of the Secretary** Workshop Participants: Tim Kelley, Linh Nguyen, Terry O’Bryant, Dan Alexander, Frank  
 Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Develop the following documents: <ul style="list-style-type: none"> <li>Statement of Work</li> <li>Executive Summary</li> <li>Justification for Other than full and open competition</li> <li>Acquisition Waiver - (OCIO and OGC not applicable)</li> <li>CD 570 - Small Business Set- Aside <b>(not often used)</b></li> </ul>	Program Office  Program Office  Program Office /CO  Program Office  OSDBU	FAR/DOC POLICY  FAR/DOC POLICY  DOC POLICY  DOC POLICY			Standardize supporting documentation requirements Department-wide.
<u><b>COMMITTS/COMMITTS NEXGEN</b></u> Customer Sends a SOW to COMMITTS Program Office	Program Office				
COMMITTS Program Office prepares Customer Service Agreement ( <i>sent back to the customer</i> )	Program Office	COMMITTS NEXGEN ORDERING GUIDE			
COMMITTS Program Office sends a finalized CSA to NIST	Program Office/ NIST	COMMITTS NEXGEN ORDERING GUIDE			
External Customer sends a MIPR or their form of funding document A.K.A. CD-435 to COMMITTS Program Office.	Customer	NIST POLICY REQUEST			

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**





## 1.4 Obtain Approval

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.4 Obtain Approvals**

Bureau: Census Workshop Participants: Peter Sefton, Greg Coss, Jerry Rorstrom-Lee Technology: Microsoft Word, Electronic CD-435 into CFS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Conduct SLIC review	IT Division Chiefs, IT Program Staff, CIO, HCO (Census), CIOs 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)	CIOs 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



**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.4 Obtain Approval**

Bureau: **NIST**

Workshop Participants: Debbie Turner, Pat Grimes

Technology: CSTARS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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 website	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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.4 Obtain Approval**

Bureau: **NOAA** Workshop Participants: John Abbott, Jan Dodi, Bernee Foreman, Lori Batson, Lillian O'Dell Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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





## 1.5 Submit Requisition to Procurement

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.5 Submit Requisition to Procurement**

Bureau: Census Workshop Participants: Peter Sefton, Greg Coss, Jerry Rorstrom-Lee Technology: Microsoft Word, Electronic CD-435 into CFS

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.5 Submit Requisition to Procurement**

Bureau: **NIST**

Workshop Participants: Debbie Turner, Pat Grimes

Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Ensure all necessary approvals have been obtained	Requisitioner		n/a	Electronic Routing/Approval (req's 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

**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.5 Submit Requisition to Procurement**

Bureau: NOAA Workshop Participants: John Abbott, Jan Dodi, Bernee Foreman, Lori Batson, Lillian O'Dell Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
1. Physically provide requisition and supporting documents to Acquisition (may email 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			



**CBE BPR & Data Standardization**  
**1.0 Create the Requisition**



Sub-process # and Name: **1.5 Submit Requisition to Procurement**

Bureau: **Office of the Secretary** Workshop Participants: Tim Kelley, Linh Nguyen, Terry O’Bryant, Dan Alexander Technology: \_\_\_\_\_

List process steps (5-7)	Who is involved? Roles	Governing policies & practices	Exceptions to these steps	Best Practices	Opportunities for improvements
<p>1. Once CD 435 package has been approved and stamped by OEB, hand carried to CAS for physical documented receipt.</p>	<p>Program Office &amp; CO</p>	<p>Acquisition Community development guide</p>	<p>Deliver directly to your favorite contracting officer and secure a date for contract delivery.</p>	<p>Follow the CAS developed guides.</p>	<p>Implement the Electronic requisition tracking system better known as ORSI. . . C.Request.</p> <p>Have the contracting specialists call the Requisitioner when then receive a requisition and keep requisitioner in the loop on the progress or lack of progress of the requisition status on a weekly basis.</p>



## TO BE Processes

### Key Design Innovations

In designing the common **1.0 Create the Requisition** process, the team leveraged the best practices from the bureaus and collaborated to develop a streamlined approach. The result is process and data which effectively achieves the goals of commonization and standardization, while leaving flexibility for bureau specific customer needs. They clearly defined what should be common and what can be bureau specific. The process continues to be non-linear as shown in figure 4, but is more logical in flow and integrated with C.Request than current processes.

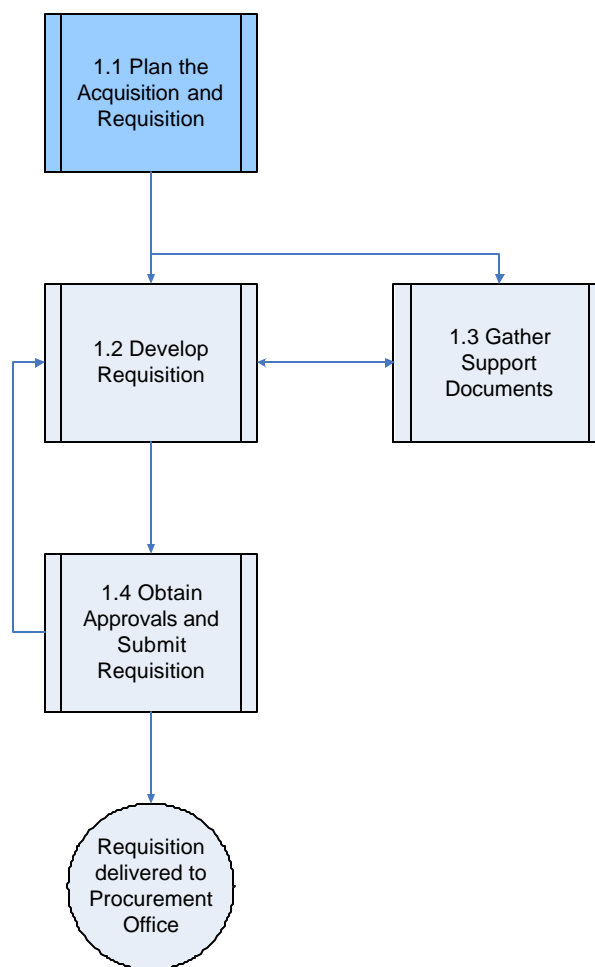


Figure 4: TO BE Process 1.0 Create the Requisition

### Acquisition Planning

The team put a great deal of thought into 1.1 Plan the Acquisition and Requisition. The result is a strawman that provides input for a common acquisition planning process as well as support for an automated acquisition planning tool (Data recommendations are contained in

## **CBE BPR and Data Standardization**

### **1.0 Create the Requisition**



Appendix A). The process also engages the Procurement Office as part acquisition team early in the acquisition planning process, leveraging the 'business broker' concept.

By forming the acquisition team early and keeping all team members—Requisitioner, Program, and Procurement—involved throughout the process, DOC can ensure that the procurement documentation is complete and accurate the first time through to eliminate rework and increase the quality of the requisition package significantly. Forming the acquisition team early also provides for early identification of schedule deliverables and milestones.

#### **Focus on performance-based procurements**

The team put a focus on performance-based acquisition, whenever possible. While the team recognizes that making the procurement process more performance-based will take time, incorporating that philosophy into the procurements process reinforces the effort and will allow people to evolve their experience with this new performance-based approach.

#### **Single system for requisition processing**

The common design completely incorporates the use of C.Request into the 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 a common system will improve the department's cross-servicing capabilities, especially through data standardization.

#### **The role of bureau management to enforce common process execution**

The C.Request system takes a step forward in requiring common data from all bureaus for requisitioning and the electronic approval and submittal to the Procurement Office. However, the system does not automatically enforce standardization through many screen fields with automated 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 (validate the ACCS string through CFS) and submit (send to the Procurement Office) functions. These common processes and their proper execution can be accomplished only through the discipline of bureau policies, practices, and management performance reinforcement.

### **TO BE Process Decomposition**

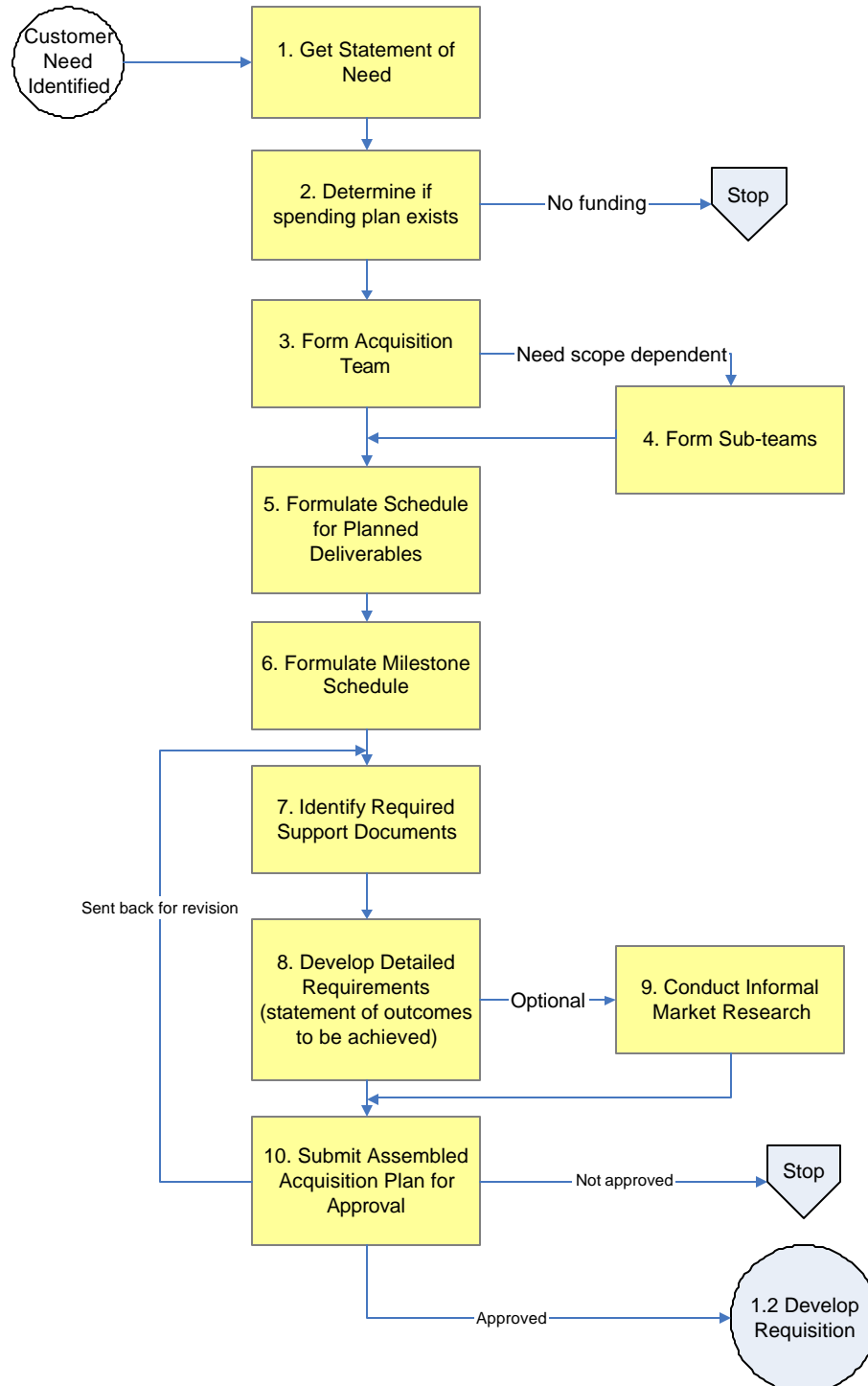
On each process definition form which follows, a sub-processes is decomposed into 5-7 steps, where applicable. Each step has the following information associated with it:

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



# 1.1 Plan the Acquisition and Requisition

## Process Flow Diagram





## TO BE Process Forms

Sub-process # and Name: **1.1 Plan the Acquisition and Requisition**  
Workshop Team members: Randy Hill, Greg Coss, Tim Kelley and Peter Sefton

List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems accessed	Additional bureau specific reqts.
1. Get statement of need	Written need	Program Requisitioner	Must define the need specifically enough to proceed with concrete planning.	No	None	Who receives the need statement will vary by bureau.
2. Determine if spending plan exists  (If funding exists, go to 3, if not, stop)	Funding exists  Funding does not exist	Administrative or Budget Officer	Congressional budget request for major systems, spend plan or budget for smaller	Budget plan	None	None
3. Form acquisition team  Number assigned to team can vary based on the scope of the need.	Members identified Communication plan  Acquisition Strategy Plan	Requisitioner, Program Area, COTR designee, budget and Acquisition Staff members, other team members as determined by need.	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-	No	None	Bureaus must follow its acquisition lead times. These are established or at least reviewed annually.

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**



List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems accessed	Additional bureau specific reqts.
			<p>purchase threshold, the Acquisition Office should be consulted.</p> <p>Above the simplified acquisition threshold, they must be involved with the team to ensure all requirements are specified well.</p> <p>If there is a dire/urgent need within days, the acquisition must be contacted and directly involved immediately.</p>			
4. Form sub-teams (need driven)	<p>Members identified</p> <p>Often Acquisition Team members lead sub-teams.</p>	Sub-teams are not needed for plans with smaller scope.	<p>Performance-based contracting policy</p> <p>Sub-teams will tackle different aspects of the planning based on the scope of the need</p> <p>Sub-teams feed their outcomes to the acquisition team.</p>	No	None	None
5. Formulate Schedule for planned deliverables	Schedule developed	Acquisition Team and sub-teams	<p>Bureau-specific</p> <p>This includes all milestones.</p>	No	Microsoft Project	None
6. Formulate milestone schedule	Plan showing events and plan to get to award	Acquisition Team		No	None	None

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**

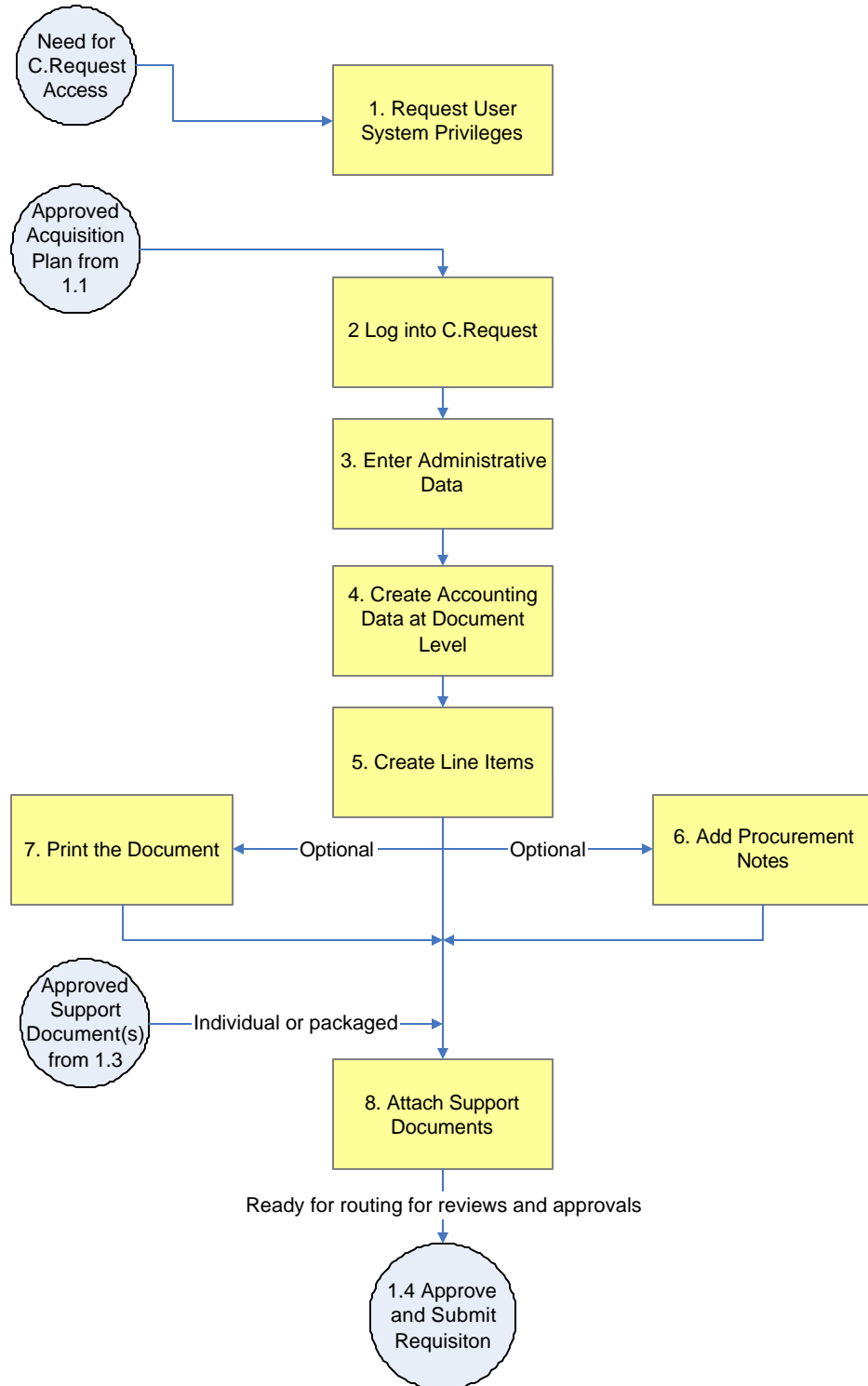


List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems accessed	Additional bureau specific reqts.
7. Identify required supporting documents	Listing of supporting documents required (need driven)	Acquisition 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)	No	Microsoft Project	AWR required in OS for procurements over \$100,000
8. Develop detailed requirements  (statement of outcomes; what you are trying to accomplish)	Written listing of requirements	Acquisition Team and sub-teams work collaboratively to reach consensus	Bureau-specific  Use results oriented language.	No	Microsoft Project	None
9. Conduct informal market research to determine availability	Written analysis of competition possibilities	Acquisition Team and/or sub-teams	Bureau-specific  This type of informal market research is 'surveillance' in nature	No	Internet research	None
10. Submit assembled acquisition plan for approval	Approved written plan	Acquisition team  Review groups	FAR, bureau-specific  Acquisition team is responsible for assembling all components of the plan and validating its completion  Electronic submissions for review and approval	No	Submit electronically using new acquisition planning systems	None



# 1.2 Develop Requisition

## Process Flow Diagram







## TO BE Process Forms

Sub-process # and Name: **1.2 Develop the Requisition**

Workshop Team members: Jerry Rorstrom-Lee, Debbie Turner, Lillian O'Dell and Frank

List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
1. Requests User System Privileges	Access/ Privileges Granted	System Administrators, Supervisors, User	User requires clearances, training, correct authority levels. This results in the user profile being established.  Some users may wish to develop standard templates for individual or bureau use.  Bureaus have common policies regarding IT Security and access issues.	Yes	E-mail, Fax, Telephone	Bureau may have varying procedures regarding user access and password requirements.
2. Log into C.Request	System available for use	User	C.Request User Documentation and Training provided	Yes	Word Processing Programs, Spreadsheet	"User" is agency defined and could be the person with the requirement or administrative staff assigned to enter requisitions
3. Enter Administrative Data	Document number assigned, and general information entered	User and/or Requisitioner	C.Request User Documentation and Training Provided. (e.g. System Generated Information),	Yes, using administrative screen	None	Pick list values shown may be a subset of the common values that are specific to the user
4. Create Accounting	Default ACCS	User and/or	Financial Policy,	Yes	CBS Finance	None

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**

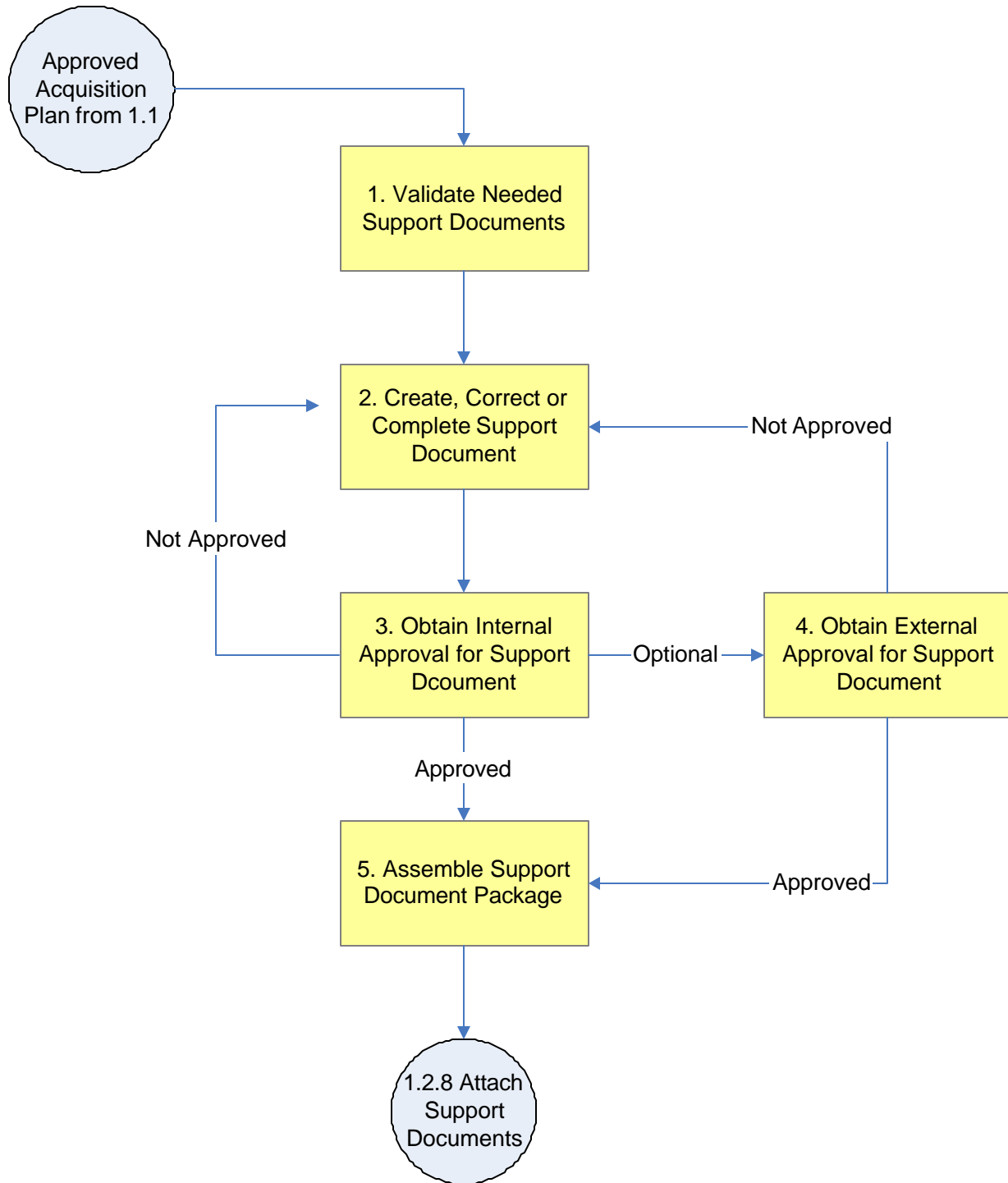


List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
Data At Document Level		Requisitioner	C.Request User Documentation and Training provided		System	
5. Create Line Items	Specific details on individual line items entered. Includes descriptions, ACCS, funding distribution, dates, deliverables, etc.	User and/or Requisitioner	C.Request User Documentation and Training Provided	Yes	None	None
6. Add procurement notes	Additional information provided to the acquisition office	User and/or Requisitioner	Optional. Additional suggested vendors are added here.  Can be done at any time after administration screen	Yes	None	None
7. Print the document	Physical requisition document	User and/or Requisitioner	Optional, for those who require paper documentation.  Can be done at any time after administration screen	Yes.	None	None
8. Attach Supporting Documentation (outcome of 1.3)	Supporting Documents are attached per 1.3	User	Per 1.3, Can be done any time after the administration screen is completed.	Yes	Word Processing Programs, Spreadsheet	None



## 1.3 Gather Supporting Documents

### Process Flow Diagram





## TO BE Process Forms

Sub-process # and Name: **1.3 Gather Support Documents**

Workshop Team members: John Abbott, Linh Nguyen, Bernie Forman, Pat Grimes

List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
1. Determine/Validate needed documentation  (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
2. Create/Correct/Complete Supporting Documentation	Completed Supporting Documentation	Requisitioners, Contract Specialist	FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy	Yes	Internet, Acquisition Planning System, MS Office	SAM
3. Obtain Internal Approval of Supporting Documentation  Based on dollar thresholds or other bureau/DOC guidance	Internal Approvals obtained	Requisitioners, Approving Officials, Reviewers, Procurement/Business Analyst, Property Mgmt, OCIO	FAR, CAR, Bureau Acquisition Policy, Procurement Executive Policy, DOC and Bureau IT Policy  Internal groups are within the bureau, usually the immediate office. Some bureaus have checklists on their procurement website.  Bureaus have written policy regarding the type of approvals and	No	Email	NIST - Change Control Board (IT Projects)  Approval groups vary by bureau.  Bureaus are encouraged to standardize approval levels for support documents wherever possible.

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**

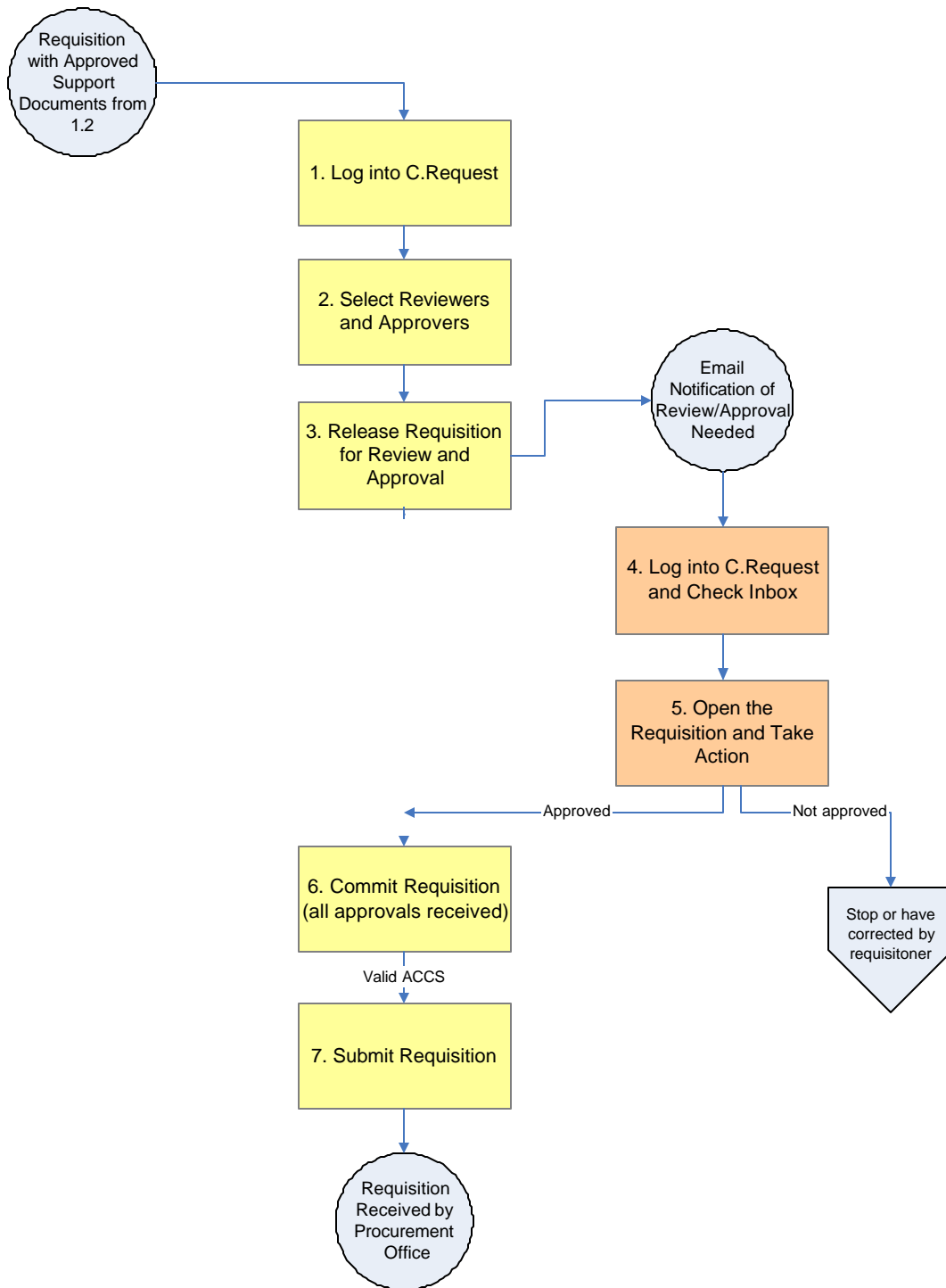


List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
			levels by supporting documents.			Time frames for approvals vary by type on dollar value for requisition.
4. Obtain External Approval of Supporting Documentation Obtain  (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	No	Email	None
5. Assemble Package (e.g., attach documentation to the requisition)	All supporting documentation have been attached to the requisition	Requisitioner	C.Request User Manual/Handbook  The need for external approvals has political customer considerations, which may cause lengthy delays.  This step is not always required for some supporting documents. Decision to use external approvals often related to funding issue. Very specific buys and GSA schedule do not require this step.	Yes	None	Time frames for approvals vary by type on dollar value for requisition



# 1.4 Obtain Approvals and Submit Requisition

## Process Flow Diagram





## TO BE Process Form

Sub-process # and Name: **1.4 Obtain Approvals and Submit Requisition**  
Workshop Team members: Lori Batson, Terry O'Bryant, & Dan Alexander

List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
Assumption: All Requisitioner will be using C.Request.						
<i>Trigger is: all support documents have been completed and are attached.</i>						
1. Logs into C.Request	Accepted into system	Requisitioner/ User	C.Request training and user manuals	Yes	None	Bureau specific security and user access requirements.
2. Select reviewer/approvers	Route list in the system	Requisitioner/ User	<p>This determination is generally based upon dollar amount of proposed procurement.</p> <p>Can be done any time after the administration screen for the requisition is completed in the system (C. Request)</p> <p>IT, 508, Greening of Government, Security, Property.</p> <p>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".</p>	Yes all reviewer/approvers must be on pick list	SAMs, Any other advanced acquisition planning tool being used by the bureaus or program offices.	<p>Reviewer/ Approvers will vary by dollar value.</p> <p>Census: May have an additional process for the budgetary approval. They currently use CFS to enforce routing and approval cycle.</p> <p>OS: additional need to enforce routing (Office of Executive Budget-OEB); the RED STAMP problem. This will need to</p>

CBE BPR and Data Standardization  
 1.0 Create the Requisition



List 5-7 process steps	Outcome produced	What roles should be involved?	Policies & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
			<p>Reviewers and approvers can forward their 'inbox' for approving to alternate approvers when they are not available. (Must be part of their training).</p> <p>At least one level above the Requisitioner to review/approve. Exception for approvals - when one person in program; has both budget and program control; anyone who has a micro purchase threshold.</p> <p>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.</p>			change.
3. Release Requisition to Reviewer / Approver	Requisition sent to reviewer(s)/ Approver (s)	Requisitioner	<p>Requisitioner releases the requisition in the C.Request system which shows up in the in-boxes of the reviewer(s) / approver(s) that are designated in the routing.</p> <p>Reviewer user profiles should carry email address to automatically received email that something inside</p>	Yes	None	None



**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**



List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
			<p>C.Request has been sent to them.</p> <p>Requisitioner notifies review/approver that requisition is available for review/approval (outside of C.Request). Reviewer approval email addresses be included in their user profiles. This eliminates need for additional email work. (NOAA, Census and OS will need to work with Office of Computer Services to make this happen)</p>			
4. Log into C.Request and Checks Inbox	Successful login and Requisition in In-Box	Reviewer/ Approver	<p>C.Request training and user manuals</p> <p>Requisition successfully released a requisition</p>	Yes	None	None
5. Open the requisition and takes action.	Approve, Disapprove, Return for change, forward to some else for action/info.	Reviewer/ Approver	<p>Must take an action as described in Outcome produced column in order to keep the requisition moving through the system</p> <p>If disapproved, the requisition goes back to the Requisitioner for changes as needed. The Requisitioner would make changes and re-release.</p>	Yes	None	None

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**



List 5-7 process steps	Outcome produced	What roles should be involved?	Polices & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
			Disapproval may stop the requisition, which will then be cancelled.			
6. Commit the requisition	CFS returns validated ACCS to Requisitioner	Requisitioner/ user / approver	Valid ACCS  <u>Issue:</u> 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 it is not turned on.	YES	CFS	Bureaus will determine who is allowed to commit the requisition in C.Request
7. Submit the Requisition to Procurement	Successful receipt in CSTARS by Procurement  Data added to the Requisition of acceptance and who is assigned to.	Requisitioner / user / approver	It is procurement's role to review and accept the approvals.  Once submitted, the requisition is locked and data cannot be changed. To change a requisition after submission, the original requisition must be cancelled and redone.  Statuses will change, but nothing else.  The requisition should be printed off in the procurement office to be the "copy of record".	Yes	CSTARS	Bureaus will determine who is allowed to submit the requisition in C.Request

CBE BPR and Data Standardization  
 1.0 Create the Requisition



List 5-7 process steps	Outcome produced	What roles should be involved?	Policies & practices to drive commonality & performance	C. Request used?	Other systems that may be accessed	Additional bureau specific reqts.
			<p>Requisitioner can check statuses on the requisition at the document level as the procurement office makes progress on the solicitation using C.Buy. This is done through the C.Request section called "Related Documents".</p>			



## Data Standardization Table of Contents

<b>Requisition PIIN and Name</b>	<b>56</b>
Document Number .....	57
Document Name .....	58
<b>Requisition Administration: Administration Tab</b>	<b>59</b>
Requisition Number .....	60
Requisition Name .....	61
Requisition Date .....	62
Form Output .....	63
Delivery Date .....	64
Requesting Office .....	65
Point of Contact .....	66
Point of Contact Phone .....	67
Requisition Department .....	68
Project ID .....	69
Project Plan Name (Not Used) .....	70
Federal Supply Code (FSC) .....	71
Free On Board (FOB) (OPEN ISSUE) .....	72
Requisition Purpose .....	73
Subject to Availability of Funds .....	74
Contract Number (OPEN ISSUE) .....	75
Delivery Order Number (OPEN ISSUE) .....	76
Suggested Vendor .....	77
<b>Requisition Administration: Funding Tab</b>	<b>78</b>
Fund Code (Not Used) .....	79
Authorized By .....	80
Funds Certified By .....	81
<b>Requisition Administration: Addresses Tab</b>	<b>82</b>
Purchase For .....	83
Deliver to .....	84
Ultimate Destination .....	85
Contracting Office .....	86
Supplemental Address .....	87
<b>Account Summary Detail</b>	<b>88</b>
Bureau Code .....	89
Fiscal Year .....	90
Fund .....	91
Program .....	92
Project .....	93
Task .....	94
Organization .....	95



Object Class.....	96
User Defined Field .....	97
Budget Object Class Code (Not Used) .....	98
Set as Default .....	99
Default Percentage.....	100
<b>Award Line Item Administration: Administration Tab</b>	<b>101</b>
Line Item Number.....	102
Quantity.....	103
Unit of Issue.....	104
Cost.....	105
Line Item Header .....	106
Line Item Description.....	107
Not to Exceed.....	108
Not Separately Priced.....	109
Line Item Federal Supply Classification Code (Not Used) (OPEN ISSUE) .....	110
Stock Item.....	111
Line Item Project ID .....	112
Prior Year (Not used) (OPEN ISSUE) .....	113
Line Item Fund Code (Not Used) .....	114
Receiving Office Number (Not Used).....	115
Award Line Item Action (Not Used) .....	116
<b>Award Line Item Administration: Address Tab</b>	<b>117</b>
Line Item Delivery Date.....	118
Line Item Deliver to.....	119
Line Item Supplemental Address .....	120
Line Item Free On Board (FOB) (OPEN ISSUE).....	121
<b>Award Line Item Administration: Option Tab</b>	<b>122</b>
Line Item Option .....	123
Option Period Begin Date.....	124
Option Period End Date.....	125
<b>Award Form Setup</b>	<b>126</b>
Form Output .....	127
Line Item Print Options.....	128
<b>Requisition Reviewer Detail</b>	<b>129</b>
Notes .....	130
Reviewer Code .....	131
Requisition Routing Sequence.....	132
Approval Priority Notice .....	133
Type of Approval.....	134
View Only .....	135
<b>Support Document Detail</b>	<b>136</b>
Support Document Title .....	137
Group Name (Not Used) .....	138
Support Document Description.....	139
Created on (OPEN ISSUE) .....	140

**CBE BPR and Data Standardization**  
**1.0 Create the Requisition**



Received On (OPEN ISSUE) .....	141
Effective On (OPEN ISSUE) .....	142
Document Location .....	143
Path/Filename .....	144
<b>Account Code LookUp</b> .....	<b>145</b>
Group Name .....	146
<b>Review Document</b> .....	<b>147</b>
Approve/Disapprove/Forward Responsibility .....	148
To Reviewer .....	149
Signature .....	150
Reviewer Comments .....	151



## C.Request Screen: Requisition PIIN and Name



Business Name			
<b>Document Number</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Document Number	Requisition PIIN and Name	
Data Definition			
Control number that uniquely identifies a Requisition document			
Valid Format, Values and examples			
Format: Bureau - 8 alphanumeric Fiscal Year - 1 numeric Counter - 5 alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): AABB0444600112 Fiscal year that the first obligation is planned.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Fiscal year cannot be changed Counter is system generated		Bureau codes maintained at bureau level.	





Business Name			
<b>Document Name</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Document Name	Requisition PIIN and Name	
Data Definition			
A unique name with the requisition document. Defaults to Document Number.			
Valid Format, Values and examples			
Format: 50 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: X Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): AABB0444600112			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
If the field is left blank, Document Number defaults. Document name is not transferred to C.Buy 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			



## C.Request Screen: Requisition Administration: Administration Tab



Business Name			
<b>Requisition Number</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Requisition Number	Requisition Administration Administration Tab	
Data Definition			
Same as Document number. Defaults.			
Valid Format, Values and examples			
Format: Defaults, read only	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The Requisition Number defaults from the Document Number established in the Requisition PIIN and Name screen and is read only.			



Business Name			
<b>Requisition Name</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	Requisition Name	Requisition Administration Administration Tab	
Data Definition			
Defaults from Document Name.			
Valid Format, Values and examples			
Format: Defaults, read only	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
If the field is left blank, Document Number defaults. Document name is not transferred to C.Buy 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			



Business Name			
<b>Requisition Date</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>  Requisition Date	<b>C.Request Screen Name</b>  Requisition Administration Administration Tab	<b>C.Buy Entity &amp; Name</b>
Data Definition			
The date the Purchase Request was started by the customer.			
Valid Format, Values and examples			
Format: MM/DD/YYYY	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Use the date the requisition is initiated.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Defaults to today's date.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Let the system default.			



Business Name			
<b>Form Output</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Form	Requisition Administration Administration Tab	
Data Definition			
The form the requisition will eventually print on.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): N/A			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Standard Req			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Only selection available.			



Business Name			
<b>Delivery Date</b>			
<input type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>  Delivery Date	<b>C.Request Screen Name</b>  Requisition Administration Administration Tab	<b>C.Buy Entity &amp; Name</b>
Data Definition			
The date entered by the customer to indicate when the products or services are requested to be delivered.			
Valid Format, Values and examples			
Format: MM/DD/YYYY	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 03/12/2006			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Not recommended to use today's date except in case of emergency or high official request.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
No back dating.			



Business Name			
<b>Requesting Office</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	Requesting Office	Requisition Administration Administration Tab	
Data Definition			
The office in which the customer requesting the resources resides.			
Valid Format, Values and examples			
Format: 30 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Organization Code or Office Code.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition	Rules for administering (creating, adding or changing) standardized values in system		
Defaults to the home office based on the user profile office setting, but can be changed.	Changes are made to the user profile to change home office.		





Business Name			
<b>Point of Contact</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b> Point of Contact	<b>C.Request Screen Name</b> Requisition Administration Administration Tab	<b>C.Buy Entity &amp; Name</b>
Data Definition			
The person to be contacted regarding this requisition.			
Valid Format, Values and examples			
Format: 61 alphanumeric charcters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Jan Dodi, Jerry Rorstrom-Lee			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults to the user name in the user profile of the person creating the requisition. Can be changed. First name and last name.			



Business Name			
<b>Point of Contact Phone</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	POC Phone	Requisition Administration Administration Tab	
Data Definition			
Telephone number for the person named as POC			
Valid Format, Values and examples			
Format: 80 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Area Code and number with extension 301 343 4512			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Must be entered. Will default from user profile if the number is included.			



Business Name			
<b>Requisition Department</b>			
<input checked="" type="checkbox"/> Exists in C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Requisition Dept.	Requisition Administration Administration Tab	
Data Definition			
The name of customer organizational units internal or external to the bureaus.			
Valid Format, Values and examples			
Format: 20 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): HUD and NOAAs (BIS)			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
NIST has it hidden.		Use by external customers is a future consideration after policy and interagency agreement and issues are resolved.	



Business Name			
<b>Project ID</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Project ID	Requisition Administration Administration Tab	
Data Definition			
Bureau specific number to identify special efforts, projects, and plans.			
Valid Format, Values and examples			
Format: 50 digit alphanumeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Varies by bureau.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Census uses field for IT Projects NOAA uses it for SAMS OS uses six digits for COMMITS funding NIST uses for work order number		Only the first nine of the thirty characters is passed to CFS.	



Business Name			
<b>Project Plan Name (Not Used)</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	Project Plan Name	Requisition Administration Administration Tab	
Data Definition			
Reserved for future use.			
Valid Format, Values and examples			
Format: 50 alphanumeric characters or lookup	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Can this field be hidden?			



Business Name			
<b>Federal Supply Code (FSC)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>  FSC	<b>C.Request Screen Name</b>  Requisition Administration Administration Tab	<b>C.Buy Entity &amp; Name</b>  
Data Definition			
Federal Supply Classification Code or Product Service Code			
Valid Format, Values and examples			
Format: 4 alphanumeric characters	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Pick list			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Should be entered in procurement office.			



Business Name			
<b>Free On Board (FOB) (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
<input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	FOB	Requisition Administration Administration Tab	
Data Definition			
Point where the government accepts responsibility for delivery. If Origin, the Gov't 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.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Destination, Origin, See Schedule			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The Procurement Office should complete this field.  In the end it is a contracting officers decision.  <b>OPEN ISSUE</b>			



Business Name			
<b>Requisition Purpose</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Purpose	Requisition Administration Administration Tab	
Data Definition			
A high level description of the requirement.			
Valid Format, Values and examples			
Format: 2000 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Suggesting standard approach to language: "Exercising Option XXXX 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"			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Consistent use of this field needs to be reinforced in training.  NOAA uses the title to from the AAP list. Possible application by all bureaus.			





Business Name			
<b>Subject to Availability of Funds</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Subject to Availability of Funds	Requisition Administration Administration Tab	
Data Definition			
Funds are not available at the time of this requisition, but may be available in the future.			
Valid Format, Values and examples			
Format: Check box	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Decision will be made at the budget approval level. Requisitioner will not check this box until directed. Box can be changed (unchecked)			



Business Name			
<b>Contract Number (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Contract Number	Requisition Administration Administration Tab	
Data Definition			
Existing contract number that the requisition is being ordered against or Agency order number against a GSA Contract.			
Valid Format, Values and examples			
Format: 40 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Standard format. (DOC, COMMITS) SA130106SE0023 (OS) Prefix varies by bureau.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Not used in a new requirement.		Unique internal number.	
OPEN ISSUE			



Business Name			
<b>Delivery Order Number (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Delivery Order Number	Requisition Administration Administration Tab	
Data Definition			
Task order number against an existing contract			
Valid Format, Values and examples			
Format: 30 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Internal Delivery order number.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Not used in a new requirement.  OPEN ISSUE			



Business Name			
<b>Suggested Vendor</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Suggested Vendor	Requisition Administration Administration Tab	
Data Definition			
A US vendor that is in CCR and has a DUNS number or a foreign vendor with a DUNS number.			
Valid Format, Values and examples			
Format: Search Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist-CCR plus others			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Limited to one vendor.  Five exceptions to the CCR		Non-CCR vendors can be added by system administrator	



## C.Request Screen: Requisition Administration: Funding Tab



Business Name			
<b>Fund Code (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Fund Code	Requisition Administration Funding Tab	
Data Definition			
Not Used (COTS system carryover)			
Valid Format, Values and examples			
Format: 4 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Not used at NOAA or NIST  Recommend graying out. The group recommends not using this screen.			



Business Name			
<b>Authorized By</b>			
<input checked="" type="checkbox"/> Exists in C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
<input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Authorized By:	Requisition Administration Funding Tab	
Data Definition			
The person who can authorize the expenditure of funds in the requesting organization. This is merely a name and not an approval.			
Valid Format, Values and examples			
Format: 50 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Can enter First and Last name as free text. (ex Division Chief)			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Pick List			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Requisitioner can enter a name or select from picklist.  NIST and OS are using it. NOAA is not using this field.  The group recommends not using this screen.		Pick list consists of any active user, maintained by System Administrator.	



Business Name			
<b>Funds Certified By</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Funds Certified By:	Requisition Administration Funding Tab	
Data Definition			
The administrative officer from the requesting office who verifies funds are available.			
Valid Format, Values and examples			
Format: 50 alphanumeric characters	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Requisitioner can enter a name or select from picklist.  NIST, OS, is using it. NOAA is not using this field. The group recommends not using this screen.		Pick list consists of any active user, maintained by System Administrator.	





## C.Request Screen: Requisition Administration: Addresses Tab



Business Name			
<b>Purchase For</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Purchase for	Requisition Administration Addresses Tab	
Data Definition			
The customer agency or specific group who has the need.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist maintained at bureau level.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition	Rules for administering (creating, adding or changing) standardized values in system		
Defaults from user profile but can be changed.  Group recommends making this field required.	List maintained by system admin at a Bureau level  Some of the fields can be pre-filled based on user profile.		



Business Name			
<b>Deliver to</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Deliver To:	Requisition Administration Addresses Tab	
Data Definition			
The first point of delivery for the goods or services.			
Valid Format, Values and examples			
Format: Picklist 15-digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Could be a loading dock or direct office.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist maintained at bureau level.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Could be the same as the Purchase for Address.  Group recommends making this field required.		List maintained by system admin at a Bureau level  Some of the fields can be pre-filled based on user profile.	



Business Name			
<b>Ultimate Destination</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Ultimate Destination	Requisition Administration Addresses Tab	
Data Definition			
The final point of delivery for the goods or service.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist maintained at bureau level.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Group recommends making this field optional.		List maintained by system admin at a Bureau level Some of the fields can be pre-filled based on user profile.	



Business Name			
<b>Contracting Office</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Contracting Office	Requisition Administration Addresses Tab	
Data Definition			
The acquisition office providing the procurement services.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist maintained at bureau level.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
This field can be changed from the default.		List maintained by system admin at a Bureau level	



Business Name			
<b>Supplemental Address</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>  Supplemental Address Information	<b>C.Request Screen Name</b>  Requisition Administration Addresses Tab	<b>C.Buy Entity &amp; Name</b>
Data Definition			
Free text field used differently by each bureau for specific delivery instructions.			
Valid Format, Values and examples			
Format: 100 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Cannot be left blank. Name and location of final delivery.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
NIST-(req'd) NOAA - Not used (N/A inserted) Census - (req'd) OS- TBD		System required field.	



## C.Request Screen: Account Summary Detail



Business Name			
<b>Bureau Code</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Bureau Code (2)	Account Summary Detail	
<b>Data Definition</b>			
2-digit FIPS Code designating the customer bureau			
<b>Valid Format, Values and examples</b>			
Format: Picklist 2-digit numeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Pick list			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
<b>Rules for creating or changing on a requisition</b>		<b>Rules for administering (creating, adding or changing) standardized values in system</b>	
The entire ACCS can be imported.		Pick list maintained by the system administrator. Values must match CFS.	





Business Name			
<b>Fiscal Year</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Fiscal Year (2)	Account Summary Detail	
Data Definition			
Fiscal year of the money being used.			
Valid Format, Values and examples			
Format: Picklist 2 Digit numeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported. Must use appropriate accounting string for the money being used.		Maintained by system administrator	



Business Name			
<b>Fund</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Fund (2)	Account Summary Detail	
Data Definition			
Code used by the Treasury to assign funds to Federal Departments.			
Valid Format, Values and examples			
Format: Picklist 2 digit numeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Working capital			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported. Training issue, users should use the picklist. However, the system does not stop you from entering values.		Picklist maintained by system administrator	



Business Name			
<b>Program</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b> Program	<b>C.Request Screen Name</b> Account Summary Detail	<b>C.Buy Entity &amp; Name</b>
Data Definition			
Code used by Congress to grant program authority to Federal Departments. Program authority gives each Department the legal authority to spend funds.			
Valid Format, Values and examples			
Format: Picklist 9-digit numeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported.		Picklist maintained by system administrator	



Business Name			
<b>Project</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Project	Account Summary Detail	
Data Definition			
codes used to assign and track costs associated with specific work efforts.			
Valid Format, Values and examples			
Format: Picklist 7 digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported.		Picklist maintained by system administrator	



Business Name			
<b>Task</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Task	Account Summary Detail	
Data Definition			
codes used to assign and track costs associated with specific work efforts. Task codes provide another level of detail to project codes.			
Valid Format, Values and examples			
Format: Picklist 3 digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported.			



Business Name			
<b>Organization</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Organization	Account Summary Detail	
Data Definition			
Code used to identify the specific organization that is creating a procurement or finance transaction.			
Valid Format, Values and examples			
Format: Picklist 16 digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported.			



Business Name			
<b>Object Class</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Object Class	Account Summary Detail	
Data Definition			
Numeric codes assigned to financial transactions to identify the nature of a service or item.			
Valid Format, Values and examples			
Format: Picklist 8 digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported.			



Business Name			
<b>User Defined Field</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	User Defined	Account Summary Detail	
Data Definition			
A field that can be used by the Burueas to track miscellaneous accounting transactions on an as-needed basis.			
Valid Format, Values and examples			
Format: Picklist 6-digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The entire ACCS can be imported. In most cases, the User Defined Field (UDF) will contain all zeros.			





Business Name			
<b>Budget Object Class Code (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	BOC	Account Summary Detail	
Data Definition			
Currently not used			
Valid Format, Values and examples			
Format: 8-digit alphanumeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Recommend graying out.			



Business Name			
<b>Set as Default</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Set as default	Account Summary Detail	
Data Definition			
A selection box that automatically applies the ACCS to line items.			
Valid Format, Values and examples			
Format: Check Block	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Can be changed. If selected, must enter default percent from (1 to 100%) Applies ACCS code to line items.			



Business Name			
<b>Default Percentage</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
		Account Summary Detail	
Data Definition			
Value from 1 to 100%			
Valid Format, Values and examples			
Format: Numeric (NNN.NN)	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 50.00, 10.25			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Must be entered if Default is selected.			



**C.Request Screen:  
Award Line Item Administration: Administration Tab**



Business Name			
<b>Line Item Number</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Line item number	Award Line Item Administration Administration Tab	
Data Definition			
A unique number that identifies a line item on a requisition			
Valid Format, Values and examples			
Format: 6 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 0001, 0001AA			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
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.			



Business Name			
<b>Quantity</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	QTY	Award Line Item Administration Administration Tab	
Data Definition			
The number of products or services required for this line item.			
Valid Format, Values and examples			
Format: 13 numeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 1, 99			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Entered by the user			



Business Name			
<b>Unit of Issue</b>			
<input checked="" type="checkbox"/> Exists in C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	UI	Award Line Item Administration Administration Tab	
Data Definition			
The two character code for the unit of measurement of the item being purchased.			
Valid Format, Values and examples			
Format: 2 digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Bureaus to reach consensus on list of standard values.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
This field is particularly important to cross-servicing.		C.Request values must match CFS, addressed separately at each bureau. Any values added in C.Request must be added to CFS.	



Business Name			
<b>Cost</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Cost	Award Line Item Administration Administration Tab	
Data Definition			
The cost of the product or service per unit of issues.			
Valid Format, Values and examples			
Format: 17 digit numeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 1234.55, 1.24			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Number can be positive or negative. CFS will make negative values zero.			





Business Name			
<b>Line Item Header</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Header	Award Line Item Administration Administration Tab	
Data Definition			
A free text field used differently by each bureau.			
Valid Format, Values and examples			
Format: 2000 Characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Highlight an item, Periods of performance.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
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			



Business Name			
<b>Line Item Description</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	Description	Award Line Item Administration Administration Tab	
Data Definition			
A brief set of words that tells procurement what you want. Narrative with description and also may contain justification (what and sometimes the why).			
Valid Format, Values and examples			
Format: 8000 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 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. "			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition	Rules for administering (creating, adding or changing) standardized values in system		
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.			



Business Name			
<b>Not to Exceed</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Not to Exceed	Award Line Item Administration Administration Tab	
Data Definition			
Specifies a ceiling for a line item purchase.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Related to the line item cost and or quantity. Selected by requisitioner.			



Business Name			
<b>Not Separately Priced</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	Not Separately Priced	Award Line Item Administration Administration Tab	
Data Definition			
A zero dollar line item that cannot be accepted until all items have been received.			
Valid Format, Values and examples			
Format: Checkbox	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Computers, monitors and keyboards where each is on a separate line item but you do not want to pay until all are received.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Selected by requisitioner. Must be zero dollars.			



Business Name			
<b>Line Item Federal Supply Classification Code (Not Used) (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	FSC code	Award Line Item Administration Administration Tab	
Data Definition			
A four-character classification code of all items of supply used by the federal government.			
Valid Format, Values and examples			
Format: 4-digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
OPEN ISSUE			



Business Name			
<b>Stock Item</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b> Stock Item	<b>C.Request Screen Name</b> Award Line Item Administration Administration Tab	<b>C.Buy Entity &amp; Name</b>
Data Definition			
Provides a means of simplifying the ordering process for stock or warehouse items frequently reordered.			
Valid Format, Values and examples			
Format: Picklist 29-digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Selected by requisitioner. Picking a stock item will overwrite the description field and additional text can also be added.		Table is maintained at the bureau level. Could use standard stock numbers.	



Business Name			
<b>Line Item Project ID</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Project ID	Award Line Item Administration Administration Tab	
Data Definition			
Bureau specific number to identify special efforts, projects, and plans.			
Valid Format, Values and examples			
Format: 50 digit alphanumeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults from document level data and can be changed. Census uses field for IT Projects NOAA uses it for SAMS OS uses six digits for COMMITS funding NIST uses for work order number		Only the first nine of the thirty characters is passed to CFS.	



Business Name			
<b>Prior Year (Not used) (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Prior Year	Award Line Item Administration Administration Tab	
Data Definition			
Not Used			
Valid Format, Values and examples			
Format: Checkbox	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Group recommends graying out if no CFS impact.  OPEN ISSUE			





Business Name			
<b>Line Item Fund Code (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Fund code	Award Line Item Administration Administration Tab	
Data Definition			
COTS System carryover. Note Used			
Valid Format, Values and examples			
Format: 4 alphanumeric characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Not used at NOAA or NIST  Recommend graying out.			



Business Name			
<b>Receiving Office Number (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
<input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Receiving Office Number	Award Line Item Administration Administration Tab	
Data Definition			
No definition (COTS System Carryover)			
Valid Format, Values and examples			
Format: 8-digit alphanumeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Group recommends graying out.			



Business Name			
<b>Award Line Item Action (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Award LI Action	Award Line Item Administration Administration Tab	
Data Definition			
Not defined			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Group recommends graying out until a web-based decision is made. Should be revisited if C.Award is selected.			



**C.Request Screen:  
Award Line Item Administration: Address Tab**



Business Name			
<b>Line Item Delivery Date</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Delivery Date	Award Line Item Administration Address Tab	
Data Definition			
The date entered by the customer to indicate the when the product or services are requested to be delivered.			
Valid Format, Values and examples			
Format:	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Not recommended to use today's date except in case of emergency or high official request.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults for Document level. User can change if a different delivery date is required for this line item.			



Business Name			
<b>Line Item Deliver to</b>			
<input checked="" type="checkbox"/> <b>Exists in C.Request</b> <input type="checkbox"/> <b>Needed in C.Request</b> <input type="checkbox"/> <b>Non-C.Request</b>	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Deliver To	Award Line Item Administration Address Tab	
Data Definition			
The first point of delivery for the goods or service.			
Valid Format, Values and examples			
Format: Picklist 15-digit alphanumeric	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist maintained at bureau level.			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults from Document level data. Allows changing for specific line item deliver.		List maintained by system admin at a Bureau level Some of the fields can be pre-filled based on user profile.	



Business Name			
<b>Line Item Supplemental Address</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Supplemental Address	Award Line Item Administration Address Tab	
Data Definition			
Free text field used differently by each bureau for specific delivery instructions.			
Valid Format, Values and examples			
Format: 100 characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Cannot be left blank. Name and location of final delivery.			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults from document level. Can be changed for specific line item			



Business Name			
<b>Line Item Free On Board (FOB) (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>  FOB	<b>C.Request Screen Name</b>  Award Line Item Administration Address Tab	<b>C.Buy Entity &amp; Name</b>  (Greyed out)
Data Definition			
<p>Point where the government accepts responsibility for delivery. If Origin, the Gov't 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.</p>			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Destination, Origin, See Schedule			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
The Procurement Office should complete this field.  In the end it is a contracting officers decision.  OPEN ISSUE			





## C.Request Screen: Award Line Item Administration: Option Tab



Business Name			
<b>Line Item Option</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Option	Award Line Item Administration Option Tab	
Data Definition			
A designated period of time beyond the base period. Used for services to designate multi-year needs.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Blank, Base Period, Option Period			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
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.			



Business Name			
<b>Option Period Begin Date</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Period Begin Date	Award Line Item Administration Option Tab	
Data Definition			
Base period or option start date.			
Valid Format, Values and examples			
Format: DD/MM/YYYY	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Required if line item option used.			



Business Name			
<b>Option Period End Date</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Period End Date	Award Line Item Administration Option Tab	
Data Definition			
Base period or option end date.			
Valid Format, Values and examples			
Format: DD/MM/YYYY	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Required if line item option used.			



## C.Request Screen: Award Form SetUp



Business Name			
<b>Form Output</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Form	Award Form Setup	
Data Definition			
Defaults from form selected earlier.			
Valid Format, Values and examples			
Format: Picklist	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Standard req			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	



Business Name			
<b>Line Item Print Options</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Print Options	Award Form Setup	
Data Definition			
Options that you would like to add to your printed form.			
Valid Format, Values and examples			
Format: Checkbox	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): 6 options (Accounting code, Cost of Line Item, Delivery Address, Delivery Date, FOB Designation, Stock Number)			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Prints at line item level.			



## C.Request Screen: Requisition Reviewer Detail





Business Name			
<b>Notes</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Notes	Requisition Reviewer Detail	
Data Definition			
Any addition information that you would like to provide to the acquisition office that you have not had the opportunity to provide.			
Valid Format, Values and examples			
Format: 1000	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Additional Suggested vendors, Notes to the contracting specialists, Identify Contracting Specialist contacted.			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
This information does not print anywhere, but does come across on the Procurement Notes.			



Business Name			
<b>Reviewer Code</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b> Reviewer Code	<b>C.Request Screen Name</b> Requisition Reviewer Detail	<b>C.Buy Entity &amp; Name</b>
Data Definition			
Three 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.			
Valid Format, Values and examples			
Format: 3 digit Code	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Picklist			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input checked="" type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
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 themselves 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.		Maintained by bureau system administrator.	



Business Name			
<b>Requisition Routing Sequence</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b> Receiving Order	<b>C.Request Screen Name</b> Requisition Reviewer Detail	<b>C.Buy Entity &amp; Name</b>
Data Definition			
The sequence in which the selected reviewer/approver will get the requisition.			
Valid Format, Values and examples			
Format: 3 digit numeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): 10, 20, 30			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
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.			



Business Name			
<b>Approval Priority Notice</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Priority	Requisition Reviewer Detail	
Data Definition			
Option that moves the approval action message to the tops of the approver's C.Request inbox.			
Valid Format, Values and examples			
Format: Checkbox	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Currently grayed out.			



Business Name			
<b>Type of Approval</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Approval Require and Carbon Copy	Requisition Reviewer Detail	
Data Definition			
Approval Required - Document must be approved before it proceeds on the routing. Carbon Copy - Document will proceed on route regardless approval.			
Valid Format, Values and examples			
Format: Radio Button	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults to "Approval Required". User can change to "Carbon Copy". Carbon Copy still requires an Approve/Disapprove action to remove from inbox. Approval is not required by the system prior to Submission.			



Business Name			
<b>View Only</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	View Only	Requisition Reviewer Detail	
Data Definition			
Selection box which allows/prevents reviewers to make changes.			
Valid Format, Values and examples			
Format: Checkbox	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Checkbox			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Defaults unchecked "View only" allows approval/disapproval, but not document editing. If you select "Carbon Copy", View Only defaults.			



## C.Request Screen: Support Document Detail



Business Name			
<b>Support Document Title</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Title	Support Document Detail	
Data Definition			
Description of support document			
Valid Format, Values and examples			
Format: 40 Alphanumeric	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Statement of Work, Government Estimate, Sole Source Justification			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Free text. Needs to describe the type of document you are attaching.			





Business Name			
<b>Group Name (Not Used)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Group Name	Support Document Detail	
Data Definition			
Not used			
Valid Format, Values and examples			
Format:	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Group recommends graying out.			



Business Name			
<b>Support Document Description</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
		Support Document Detail	
Data Definition			
A brief summary/explanation of the supporting document.			
Valid Format, Values and examples			
Format: 2000 characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Open issue. Will determine whether the information flows onto CSTARS.			



Business Name			
<b>Created on (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
	Created on	Support Document Detail	
Data Definition			
The date the support document was created.			
Valid Format, Values and examples			
Format: DD/MM/YYYY	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Open Issue			



Business Name			
<b>Received On (OPEN ISSUE)</b>			
<input type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
		Support Document Detail	
Data Definition			
The date the support document was received.			
Valid Format, Values and examples			
Format: DD/MM/YYYY	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Open Issue			



Business Name			
<b>Effective On (OPEN ISSUE)</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	Field on C.Request Screen	C.Request Screen Name	C.Buy Entity & Name
		Support Document Detail	
Data Definition			
The date the support document became (or will become) effective.			
Valid Format, Values and examples			
Format: DD/MM/YYYY	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Open Issue			



Business Name			
<b>Document Location</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Document Location	Support Document Detail	
Data Definition			
The location of the supporting document.			
Valid Format, Values and examples			
Format: Radio button	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): (Enter Hardcopy Location, Upload existing file, Create New File Using Template)			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Default is Upload Existing File Uploaded files are stored on the database.			



Business Name			
<b>Path/Filename</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Path/Filename or physical location	Support Document Detail	
Data Definition			
The electronic or physical location of the file.			
Valid Format, Values and examples			
Format: 50 character	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two): Files			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Required for supporting documents.			



## C.Request Screen: Account Code LookUp





Business Name			
<b>Group Name</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Group Name	Account Code LookUp	
Data Definition			
The project number for associated ACCSs.			
Valid Format, Values and examples			
Format:	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
		Individuals can create and access personalized lists for themselves of Systems Administrators can create groups for a Bureau.	



## C.Request Screen: Review Document



Business Name			
<b>Approve/Disapprove/Forward Responsibility</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>  Approve/Disapprove/Forward Responsibility	<b>C.Request Screen Name</b>  Review Document	<b>C.Buy Entity &amp; Name</b>  
Data Definition			
Reviewer action			
Valid Format, Values and examples			
Format: Radio Button	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	



Business Name			
<b>To Reviewer</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	To Reviewer	Review Document	
Data Definition			
The 3-digit Code of the individual that the responsibility is being forwarded to.			
Valid Format, Values and examples			
Format: 3 digit	Is this a free form field? <input type="checkbox"/> Yes, enter examples. <input checked="" type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items): Pick list			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Required if "Forward Responsibility" is selected.			



Business Name			
<b>Signature</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Signature	Review Document	
Data Definition			
Password for your electronic signature.			
Valid Format, Values and examples			
Format:	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Signature password must match the signature password in the approvers user profile. Open issue: a policy needs to be issued allowing electronic signatures in lieu of hardcopy signature.			



Business Name			
<b>Reviewer Comments</b>			
<input checked="" type="checkbox"/> Exists in C.Request <input type="checkbox"/> Needed in C.Request <input type="checkbox"/> Non-C.Request	<b>Field on C.Request Screen</b>	<b>C.Request Screen Name</b>	<b>C.Buy Entity &amp; Name</b>
	Comments	Review Document	
Data Definition			
A text fields that contains a message to the requisitioner explaining reason for disapproval or forwarding.			
Valid Format, Values and examples			
Format: 500 characters	Is this a free form field? <input checked="" type="checkbox"/> Yes, enter examples. <input type="checkbox"/> No, enter standardized values.	Required to be entered: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
High-quality examples or minimum content for free form field (at least two):			
Recommended Standardized Value(s) (e.g., pick list/look-up table items):			
Must this data item be common across all bureaus: <input checked="" type="checkbox"/> Yes, enter common usage rules below. <input type="checkbox"/> No, indicate bureau usage differences below.			
Rules for creating or changing on a requisition		Rules for administering (creating, adding or changing) standardized values in system	
Is required if the requisition is forwarded or disapproved.			



## Issue Management

The following pages contain the current outstanding issues that need resolution as well as issues that were raised and resolved during the first workshop. Resolution efforts are currently underway for several of these issues and some will be resolved during Workshop #2. Any issues that require resolution by the Program Sponsor will be forwarded accordingly with recommendations.



## OPEN ISSUES

Procurement involvement in acquisition planning	
Issue date: <b>3.21.06</b>	Issue submitter: Many team members
<p>Issue description</p> <p>What is a 'ready requisition?'</p> <p>Does the acquisition team (Solicitation team) get involved early in 1.1 Plan the requisition using the 'business broker' concept?</p>	
<p>What type of issue is this?</p> <p><input checked="" type="checkbox"/> Create requisition process name) _____ <input type="checkbox"/> IT (system</p> <p><input checked="" type="checkbox"/> Award contract process <input type="checkbox"/> Bureau readiness preparation</p> <p><input checked="" type="checkbox"/> Manage contract process <input type="checkbox"/> End user Training</p> <p><input type="checkbox"/> Don't Know <input type="checkbox"/> Other (please explain)</p>	
<p>What organizations that may be impacted?</p> <p><input checked="" type="checkbox"/> OS <input checked="" type="checkbox"/> NIST <input checked="" type="checkbox"/> Census <input checked="" type="checkbox"/> NOAA <input checked="" type="checkbox"/> PTO</p> <p><input type="checkbox"/> Don't know <input type="checkbox"/> Not applicable <input type="checkbox"/> Other _____</p>	
<p>Describe the possible impacts on the organization(s)</p> <p>Business broker concept is new. Creates a new role for Solicitation team in the planning of requisitions. Focus is on working collaborative to avoid rework down stream</p>	
<p>Who needs to be involved in developing solution options for this issue?</p> <p>Project team in workshop #1.</p>	
<p>Who needs to make the decision to resolve this issue?</p> <p>Project team in workshop #1.</p>	
<p>Date by which this issue must be resolved <u>May 23</u></p> <p>Date on we must follow-up on this issue <u>May 23</u></p>	
<p>Issue Priority: <input type="checkbox"/> Critical <input checked="" type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy</p> <p><b>Critical:</b> If unresolved, will stop Go-live. Resolution agreed to by the Acquisition Council</p> <p><b>Serious:</b> Will cause difficulties to be resolved before Go-live. Resolved without Acquisition Council</p> <p><b>Problematic:</b> Will cause difficulties to be resolved after Go-live through continuous improvement</p> <p><b>Easy:</b> This issue can be resolved before Go-live</p>	
Possible solutions with identification of accepted resolution	
Accepted?	Solution description
	The project team will attempt to come to consensus on how to incorporate the business broker concept into the new processes and how to translate this into actual business practices. This is a process design issue and does not affect the systems that go live for Oct. 16 <sup>th</sup> .





Unit of Measure Standard Values	
Issue date: <b>4.14.2006</b>	Issue submitter: Jerry Rorstrom-Lee
Issue description	
What are the standard values for Unit?	
What type of issue is this?	
<input type="checkbox"/> Create requisition process/policy	<input checked="" type="checkbox"/> IT (system name)_____
<input type="checkbox"/> Award contract process/policy	<input type="checkbox"/> Bureau readiness preparation
<input type="checkbox"/> Administer contract process/policy	<input type="checkbox"/> End user training
<input type="checkbox"/> Don't Know	<input type="checkbox"/> Other (please explain)
What organization(s) may be impacted?	
<input checked="" type="checkbox"/> OS	<input checked="" type="checkbox"/> NIST
<input checked="" type="checkbox"/> Census	<input checked="" type="checkbox"/> NOAA
<input type="checkbox"/> Don't know	<input type="checkbox"/> PTO
<input type="checkbox"/> Not applicable	<input type="checkbox"/> Other _____
Describe the possible impacts on the organization(s)	
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	
Who needs to be involved in developing solution options for this issue?	
Each bureau must report additions to Jerry.	
Date by which this issue must be resolved <u>Wednesday, April 19, 2006</u>	
Date to follow-up _____	
Issue Priority: <input type="checkbox"/> Critical <input checked="" type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed	
<b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed.	
<b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live	
<b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution? Jerry Rorstrom-Lee	
Who needs to make the decision to resolve this issue?	
Peter Shefton (Census), John Abbott (NOAA), Debbie Turner (NIST) and Tim Kelly (OS).	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	Team is collecting input from OS, NIST, NOAA, and Census to come to agreement on a common set of units that match with CFS and all bureaus can live with.

**CBE BPR and Data Standardization  
1.0 Create the Requisition**



<b>Commitment accounting</b>	
Issue date: <b>4.14.2006</b>	Issue submitter: Lori Batson & Lillian O-Dell
Issue description	
Sometimes funding is not available because there is no commitment accounting. Awards are made but money is taken by other groups/awards.	
What type of issue is this?	
<input checked="" type="checkbox"/> Create requisition process/policy name)_____	<input type="checkbox"/> IT (system
<input checked="" type="checkbox"/> Award contract process/policy	<input type="checkbox"/> Bureau readiness preparation
<input type="checkbox"/> Administer contract process/policy	<input checked="" type="checkbox"/> End user training
<input type="checkbox"/> Don't Know	<input type="checkbox"/> Other (please explain)
What organization(s) may be impacted?	
<input checked="" type="checkbox"/> OS	<input checked="" type="checkbox"/> NIST
<input checked="" type="checkbox"/> Census	<input checked="" type="checkbox"/> NOAA
<input type="checkbox"/> PTO	<input type="checkbox"/> Don't know
<input type="checkbox"/> Not applicable	<input checked="" type="checkbox"/> Other Believe all are affected
Describe the possible impacts on the organization(s)	
If pilot program cannot be linked with C.Request, then pilot program will cause major duplication/confusion for all involved.	
Who needs to be involved in developing solution options for this issue?	
Pat O'Connor (NOAA) in charge of Funds Reservation Pilot Program, Final, and Pilot Participants	
Date by which this issue must be resolved <u>Wednesday, April 19, 2006</u>	
Date to follow-up _____	
Issue Priority: <input type="checkbox"/> Critical <input type="checkbox"/> -Serious <input checked="" type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed	
<b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed.	
<b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live	
<b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution? TBD	
Who needs to make the decision to resolve this issue?	
TBD	
<b>Possible solutions with identification of date solution accepted</b>	
Resolved date?	Solution description
5 May 06	Need to identify the participants/creator/initiators in this endeavor
TBD	Need to either eliminate or link systems



Approval Checklists	
Issue date: 4.14.2006	Issue submitter: Greg Coss, Terry O'Bryant
Issue description Bureaus should develop checklists for approval levels for requisition and make them available.	
What type of issue is this? <input checked="" type="checkbox"/> Create requisition process/policy name) _____ <input type="checkbox"/> IT (system <input type="checkbox"/> Award contract process/policy <input type="checkbox"/> Bureau readiness preparation <input type="checkbox"/> Administer contract process/policy <input type="checkbox"/> End user training <input type="checkbox"/> Don't Know <input type="checkbox"/> Other (please explain)	
What organization(s) may be impacted? <input checked="" type="checkbox"/> OS <input checked="" type="checkbox"/> NIST <input checked="" type="checkbox"/> Census <input checked="" type="checkbox"/> NOAA <input checked="" type="checkbox"/> PTO <input type="checkbox"/> Don't know <input type="checkbox"/> Not applicable <input type="checkbox"/> Other <input type="checkbox"/> Change Management _____	
Describe the possible impacts on the organization(s) Possible standardized approval levels	
Who needs to be involved in developing solution options for this issue? Requisitioner, HCO, OGC, CO, IG	
Date by which this issue must be resolved	<u>August 10, 2006</u>
Date to follow-up	<u>August 31, 2006</u>
Issue Priority: <input type="checkbox"/> Critical <input checked="" type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<p><b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed</p> <p><b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed.</p> <p><b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live</p> <p><b>Easy:</b> This is part of our implementation work and not actually an issue.</p>	
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? Mike Sade	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
8/10	<p>Collect all available checklists</p> <p>Evaluate checklists to establish commonality in approvals levels</p> <p>Allow for multiple selections to be made on approval levels in clicking on "other" option, which allows for additional approval levels and descriptions.</p>



Buy-in for implementation success	
Issue date: 4.14.2006	Issue submitter: Linh Nguyen, John Abbott, Jan Dodi, Bernie
Issue description	
How do we implement these common processes and gain organization buy in.	
What type of issue is this? <input checked="" type="checkbox"/> Create requisition process/policy (name) _____ <input type="checkbox"/> IT (system) <input type="checkbox"/> Award contract process/policy <input checked="" type="checkbox"/> Bureau readiness preparation <input type="checkbox"/> Administer contract process/policy <input checked="" type="checkbox"/> End user training <input type="checkbox"/> Don't Know <input type="checkbox"/> Other (please explain) _____	
What organization(s) may be impacted? <input checked="" type="checkbox"/> OS <input checked="" type="checkbox"/> NIST <input checked="" type="checkbox"/> Census <input checked="" type="checkbox"/> NOAA <input type="checkbox"/> PTO <input type="checkbox"/> Don't know <input type="checkbox"/> Not applicable <input checked="" type="checkbox"/> Other <input type="checkbox"/> All DOC as applicable _____	
Describe the possible impacts on the organization(s) Training Resources	
Who needs to be involved in developing solution options for this issue? Acquisition - Training Management - Enforcement Users- Implementing	
Date by which this issue must be resolved	<u>October 16, 2006</u>
Date to follow-up	<u>March 31, 2007</u>
Issue Priority: <input checked="" type="checkbox"/> Critical <input type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed <b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed. <b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live <b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution? Dan Alexander, John Abbott	
Who needs to make the decision to resolve this issue?	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	Beginning implementation in June through training. Hopefully, the completion training date will be June 07.

**CBE BPR and Data Standardization  
1.0 Create the Requisition**



Census and CFS routing enforcement	
Issue date: 4.14.2006	Issue submitter: Group
Issue description	
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	
What type of issue is this?	
<input type="checkbox"/> Create requisition process/policy	<input checked="" type="checkbox"/> IT (system name) _____
<input type="checkbox"/> Award contract process/policy	<input type="checkbox"/> Bureau readiness preparation
<input type="checkbox"/> Administer contract process/policy	<input type="checkbox"/> End user training
<input type="checkbox"/> Don't Know	<input checked="" type="checkbox"/> Other (please explain) Financial
policy/obligation of funds	
What organization(s) may be impacted?	
<input type="checkbox"/> OS	<input type="checkbox"/> NIST
<input checked="" type="checkbox"/> Census	<input type="checkbox"/> NOAA
<input type="checkbox"/> Don't know	<input type="checkbox"/> PTO
<input type="checkbox"/> Not applicable	<input type="checkbox"/> Other _____
Describe the possible impacts on the organization(s)	
The issue is how funds will be obligated. 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 has the need to see that this step was taken in CFS without having to go outside C.Request.	
Who needs to be involved in developing solution options for this issue?	
Date by which this issue must be resolved <u>October 16, 2006</u>	
Date to follow-up _____	
Issue Priority: <input type="checkbox"/> Critical <input checked="" type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed	
<b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed.	
<b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live	
<b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution?	
Who needs to make the decision to resolve this issue?	
ACQ/CFO/Systems (within Census)	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	Fundamentally, CFO/Finance area needs to see Requisition data to update CFS. Acquisition needs to see CFS update is done. Need is to see that in one integrated system. Assume there is some system Fix that could accomplish this.

CBE BPR and Data Standardization  
1.0 Create the Requisition



**CBE BPR and Data Standardization  
1.0 Create the Requisition**



CACI demo of version 8.0	
Issue date: 4.14.2006	Issue submitter: Dan Alexander
Issue description	
Have CACI provide a Demo of C.Request Version 8.0	
What type of issue is this?	
<input type="checkbox"/> Create requisition process/policy name)_C.Request_____	<input checked="" type="checkbox"/> IT (system
<input type="checkbox"/> Award contract process/policy	<input type="checkbox"/> Bureau readiness preparation
<input type="checkbox"/> Administer contract process/policy	<input type="checkbox"/> End user training
<input type="checkbox"/> Don't Know	<input type="checkbox"/> Other (please explain)
What organization(s) may be impacted?	
<input checked="" type="checkbox"/> OS	<input checked="" type="checkbox"/> NIST
<input checked="" type="checkbox"/> Census	<input checked="" type="checkbox"/> NOAA
<input type="checkbox"/> Don't know	<input type="checkbox"/> PTO
<input type="checkbox"/> Not applicable	<input type="checkbox"/> Other _____
Describe the possible impacts on the organization(s)	
Provides most recent information to all bureaus in most recent versions of C.Request.	
Who needs to be involved in developing solution options for this issue?	
CACI Rep....Gary Hill/Dan Alexander COR on Support Services Contracts	
Terry O'Bryant OS Technical Rep/Jerry Rorstrom-Lee COR BPR Data Standardization Contract	
Date by which this issue must be resolved <u>May 2 2006</u>	
Date to follow-up _____	
Issue Priority: <input type="checkbox"/> Critical <input type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy	
<b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed	
<b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed.	
<b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live	
<b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution?	
Who needs to make the decision to resolve this issue?	
Dan Alexander/Jerry Rorstrom-Lee	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
4/28/06	Obstacles - Propose version release date - if CACI is late - demo may be delayed





CSTARS electronic approvals	
Issue date: <b>4.14.2006</b>	Issue submitter: Pat Grimes and Debbie Turner
Issue description	
Can CSTARS approvals be accepted in lieu of pen and ink signatures	
What type of issue is this? <input checked="" type="checkbox"/> Create requisition process/policy (name) _____ <input type="checkbox"/> IT (system) <input type="checkbox"/> Award contract process/policy <input type="checkbox"/> Bureau readiness preparation <input type="checkbox"/> Administer contract process/policy <input type="checkbox"/> End user training <input type="checkbox"/> Don't Know <input type="checkbox"/> Other (please explain) _____	
What organization(s) may be impacted? <input checked="" type="checkbox"/> OS <input checked="" type="checkbox"/> NIST <input checked="" type="checkbox"/> Census <input checked="" type="checkbox"/> NOAA <input type="checkbox"/> PTO <input type="checkbox"/> Don't know <input type="checkbox"/> Not applicable <input type="checkbox"/> Other _____	
Describe the possible impacts on the organization(s) Forces user to revert to paper for signatures or the agency must implement a separate electronic signature system	
Who needs to be involved in developing solution options for this issue? Acquisition council	
Date by which this issue must be resolved <u>June 1, 2006</u> Date to follow-up <u>June 15, 2006</u>	
Issue Priority: <input type="checkbox"/> Critical <input type="checkbox"/> Serious <input type="checkbox"/> Problematic <input type="checkbox"/> Easy  <b>Critical:</b> If unresolved, will stop go-live. Resolution by the Acquisition Council (AC) needed <b>Serious:</b> Will cause difficulties and must be resolved before Go-live. AC not needed. <b>Problematic:</b> May cause bureau difficulties, but can be resolved after Go-live <b>Easy:</b> This is part of our implementation work and not actually an issue.	
Who should be assigned to manage this issue to resolution? Jerry	
Who needs to make the decision to resolve this issue? Mike Sade	
Possible solutions with identification of date solution accepted	
Resolved date?	Solution description
	Memo stating acceptance of C.Request approvals. No paper signature needed (Sade)





## Issues closed

Team decision making	
Issue date: <b>3.20.06</b>	<b>Resolved prior to Requisition Workshop #1</b>
Issue description: (Issue raised during Alignment Meeting)	
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	
<p>There will be a two-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</p> <ul style="list-style-type: none"> <li>• Workshop 1: Process 1.0 Create the requisition (<b>April 10-14</b>)</li> <li>• Follow-up workshop: (<b>May 22-23</b>)</li>   <li>• Workshop 2: Process 2.0 Award the Contract and 3.0 Administer the Contract (<b>May 1-5</b>)</li> <li>• Follow-up workshop: (<b>June 19-20</b>)</li> </ul> <p>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.</p>	

Original workshop schedule	
Issue date: <b>3.20-21.06</b>	Issue submitter: Pat Grimes, John Abbott, Dan Alexander
Issue description	
<p>Original schedule for workshops uses up too many resources.            Can the ORSI project be delayed until after Oct. 16<sup>th</sup>?            Can other projects be delayed until after Oct. 16<sup>th</sup>?            We must have materials for input to training by mid-April.</p>	
Resolution	
<p>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 4<sup>th</sup> quarter.</p> <p>Acquisition Council agreed to support the following:</p> <ul style="list-style-type: none"> <li>▪ Upper and middle management will provide clear visible support               <ul style="list-style-type: none"> <li>▪ Team resources available at the right time.</li> <li>▪ People have been identified and dates set for involvement.</li> <li>▪ <u>We need you to get their calendars cleared!</u></li> </ul> </li> <li>▪ Maintain Oct 16 ORSI Go-Live. Any delay will cost us another year.</li> <li>▪ All design work must be completed by July 3 (start of 4th quarter)               <ul style="list-style-type: none"> <li>▪ The design work will be compressed to meet this date</li> </ul> </li> <li>▪ Fund travel for field representatives to participate in the project</li> </ul>	



Original workshop schedule	
Issue date: <b>3.20-21.06</b>	Issue submitter: Pat Grimes, John Abbott, Dan Alexander
<ul style="list-style-type: none"> <li>▪ OS/OAM may be able to help Census and NOAA bring in field participation</li> <li>▪ To free up resources for CBE, we need to:                             <ul style="list-style-type: none"> <li>▪ Delay OS C.Request deployment until Oct</li> <li>▪ Delay RFI (web) effort until November</li> <li>▪ Add CACI support for ORSI project (in progress)</li> </ul> </li> </ul>	

Approval chain enforcement	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
How do we manage and enforce proper approval chains (e.g., Requisitioner approving his/her own requisitions)	
<b>Resolution</b>	
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: <ul style="list-style-type: none"> <li>• 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.</li> <li>• Anyone who has a requisition at or below the micro purchase threshold.</li> </ul>	

Submit and commitment screen functionality	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
How does the submit screen in C.Request function? How does the commit screen in C. Request function?	
<b>Resolution</b>	
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.

Accounting screen pick list for ACCS	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
<p>Are the C.Request accounting screen data items available from a pick list? How do the pre-defined look-up tables for ACCSs function?</p>	
<b>Resolution</b>	
<p>C.Request does not provide pick 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:</p> <ul style="list-style-type: none"> <li>o Bureau Code</li> <li>o Fiscal Year</li> <li>o Fund</li> <li>o Program</li> <li>o Project</li> <li>o Task</li> <li>o Organization</li> <li>o Object Class</li> <li>o User Defined</li> </ul> <p>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.</p>	

Tracking progress outside of C.Request	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
<p>How do we track the progress of our requisition once it has gone into the procurement office?</p>	
<b>Resolution</b>	
<p>C.Buy, 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.</p>	



Routing list enforcement in C.Request	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
Does C.Request allow bureaus to standardize and require (enforce) certain routing chains for certain types of contracts and dollar amounts?	
<b>Resolution</b>	
No. FAR and bureau policy dictate required routing chains which must be enforced through process management by the business.	

Use of C.Request >1 year requisitions	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
How should C.Request be used for major requisitions that will require of more than one year before they can be submitted for solicitation?	
<b>Resolution</b>	
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: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
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?	
<b>Resolution</b>	
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: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
How will we be able to implement C.Request and C.Buy before Oct. 16 <sup>th</sup> with limited budgets?	
<b>Resolution</b>	
Mr. Mike Sade and the Acquisition Council have mandated the implementation of C.Request and C.Buy. It will go live October 16 <sup>th</sup> . Bureaus must do whatever is necessary to prepare for the go-live (training and business practice changes) before that time.	

C.Request approvals as 'official'	
Issue date: <b>4.14.2006</b>	<b>Resolved during Requisition Workshop #1</b>
Issue description	
Will approvals in C.Request be considered 'official'? What approach is being used? Will there be electronic signatures.	
<b>Resolution</b>	
C.Request uses a special 'approval' type password in the user profiles of those individuals who are authorized to approve requisitions at various \$ amounts. This is not a digital signature. However it is more than a radial button that can be checked by anyone.	
NIST has used this special password as an 'official' approval for almost five years. There is an open issue to document and confirm this policy at the department level.	



## Appendix A: Acquisition Planning Data Recommendations

[To be added]