# Data Mapping

## *Purchase Request*

**March 9, 2000**

## Data mapping: *Purchase Request*

Once a requisition has been routed for approval, reviewers will follow the steps below to review, approve, and submit the procurement action.

Then users will follow the purchase request process for simplified acquisitions (small purchases).

## Reviewer's In Box

Reviewers on the route list will receive an e-mail notifying them that an action has been routed to them for review and may need approval.

The reviewer will notice that their CSTARS *In Box* appears full (yellow paper).

In addition, the status bar displays the number of new items, along with a total number of items within the CSTARS *In Box* (fig. 1).

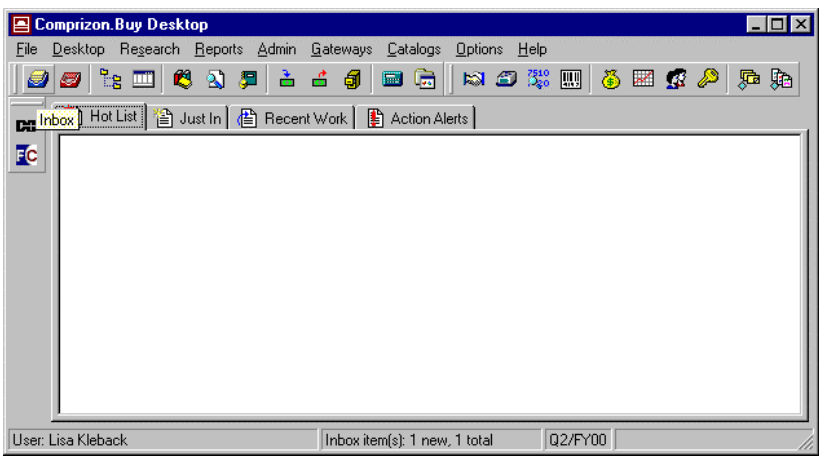


***Figure 1 - CSTARS desktop***

From the CSTARS desktop, the reviewer will open their *In Box* by clicking on the *In Box* icon on the toolbar.

The *Review & Approval Browser* will display (fig. 2).

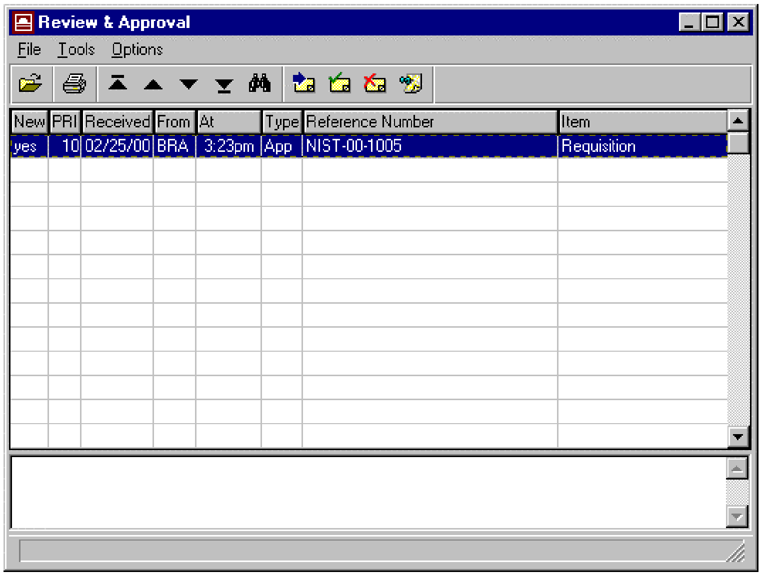


***Figure 2 - Review & Approval Browser***

One new item will be listed indicating the originator 3 - digit ID, date, time that the item was routed, along with the type of record that was routed (i.e. Requisition, Purchase Request, Solicitation, Award, Modifications or Project), and the record number.

The reviewer will have the ability to open and review the routed item.

## Submitting a Requisition

To submit a requisition, users will highlight the requisition, and click the *Open* button that will display the *Customer Requisition Summary Screen*.

Then users will click the *Submit Requisition* button from the *Customer Requisition Summary Screen* (fig. 3).

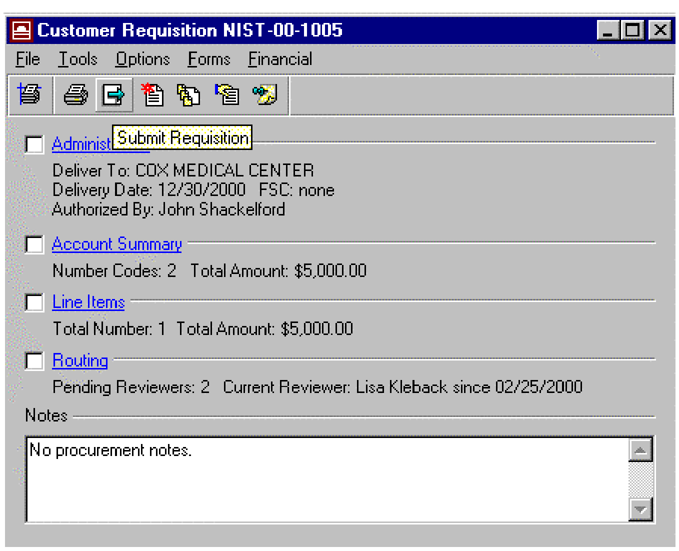


***Figure 3 - Customer Requisition Summary Screen***

The *Submit Requisition Screen* will display (fig. 4).

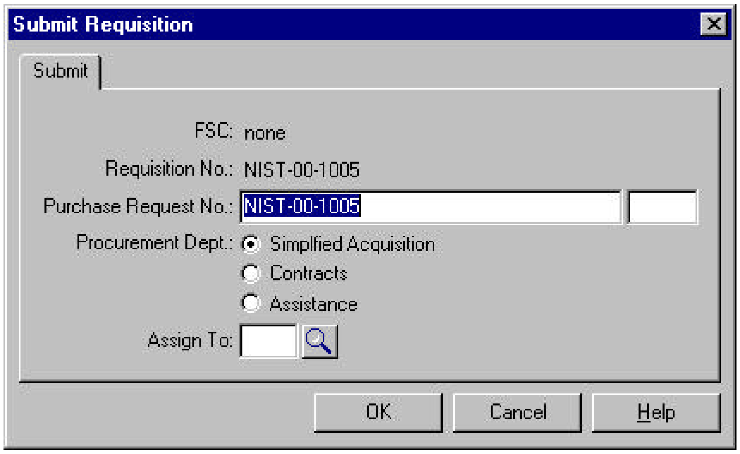


***Figure 4 - Submit Requisition Screen***

From the *Submit Requisition Screen*, users will either accept the purchase request number, or enter in a new number.

Then users will select which subsystem in which the requisition will be submitted:

- Simplified Acquisition - used for small purchases <= $100,000.
- Contracts - used for large purchases > $100,000.

Lastly, users will enter the 3-digit User ID that indicates the person that the requisition will be assigned to.

Otherwise, users will leave the *"Assign To"* field blank.

When finished, users will click the *OK* button and return to the *Customer Requisition Summary Screen*.

## Approve/Disapprove

Close the *Customer Requisition Summary Screen* and return to the *Review & Approval Browser*.

The reviewer will either *Approve* or *Disapprove* the routed record, by selecting the corresponding buttons from the *Review & Approval Browser* (fig. 5).

For the following example, the reviewer will click the *Approve* button from the browser. When asked to enter a signature password, the reviewer will do so, then press the *OK* key to proceed.

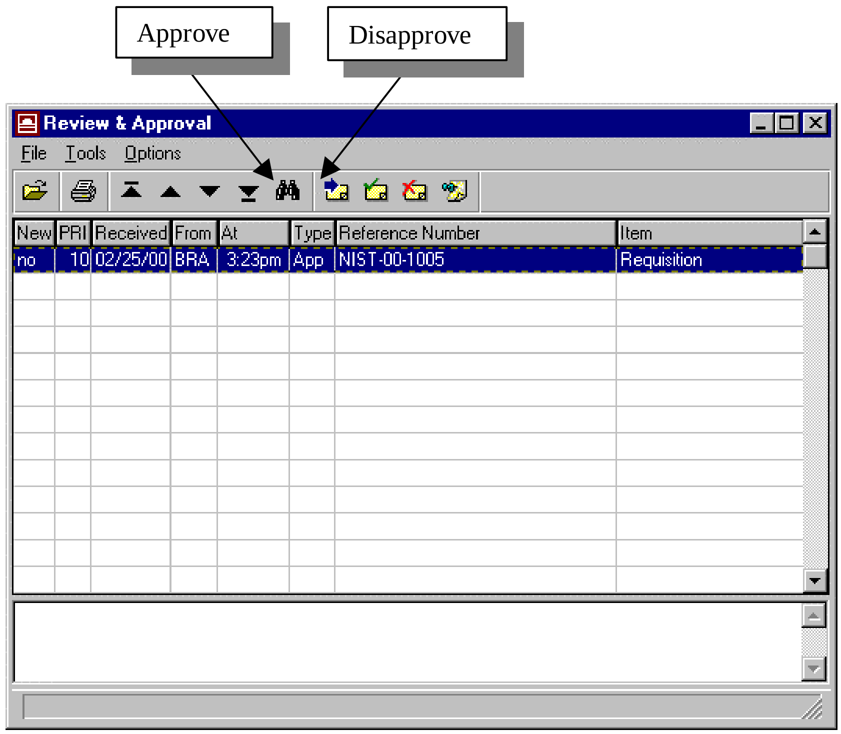


***Figure 5 - Review & Approval Browser***

Once the requisition has been approved, users will return to the worksheet by clicking the *Close* button at the upper right hand corner of the *Customer Requisition Summary Screen*.

This will display the status of the requisition as *"Submitted"* (fig. 6).

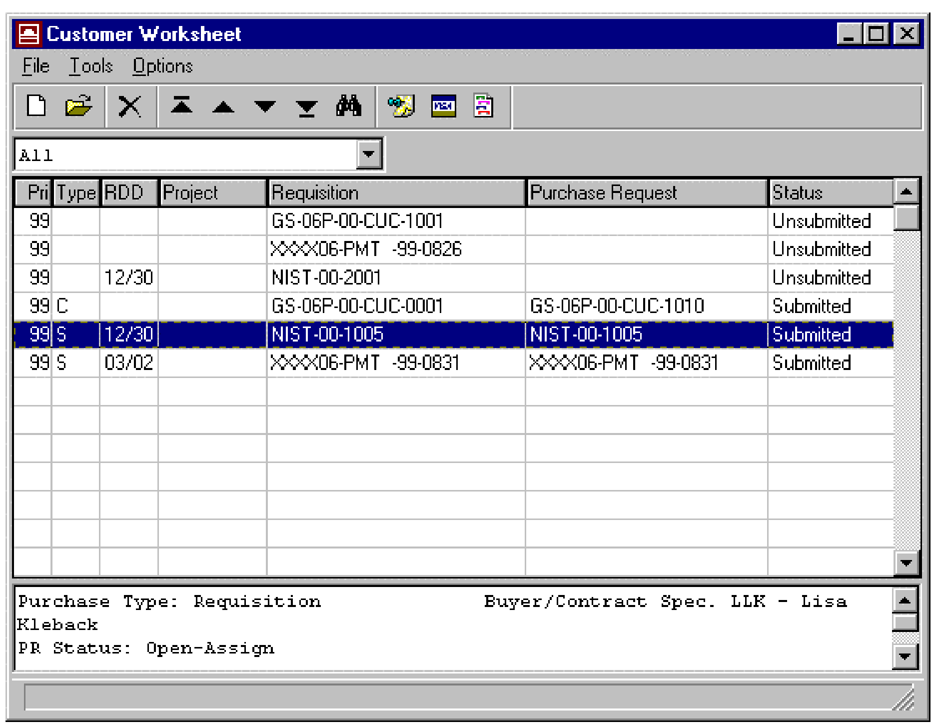


***Figure 6 - Customer Worksheet***

## Accessing the Purchase Request

To access the *Purchasing* subsystem, click the *Worksheet* icon from the CSTAR desktop, this will display a list of subsystems (fig. 7).

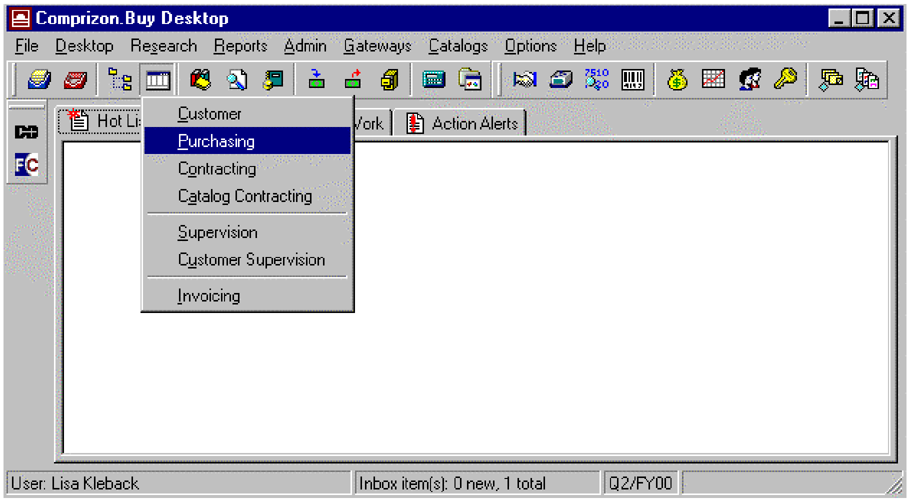


***Figure 7 – Worksheet icon – subsystems***

Highlight and click the *Purchasing subsystem* from the list, this will display the *Purchasing Worksheet* (fig. 8).

Click the drop-down arrow at the top of the browser, and select the *Open PRs* option.

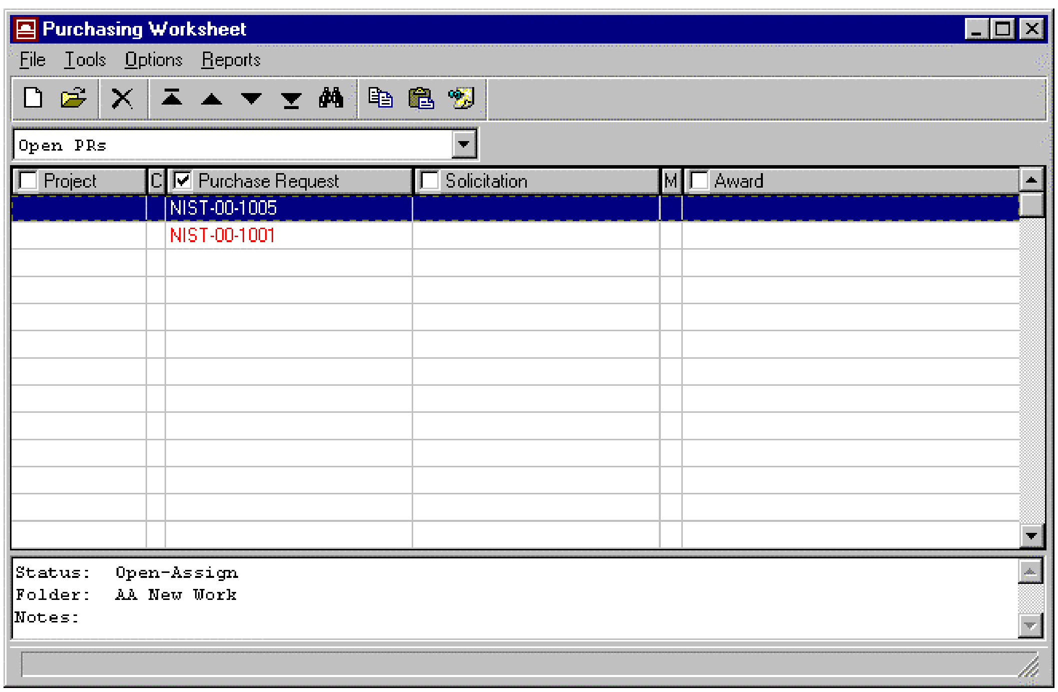


*Figure 8 – Purchasing Worksheet*

To create a new Purchase Request, users will click the *New* button located within the *Purchasing Worksheet*, this will display the *New Purchase Request Screen* (fig. 9).

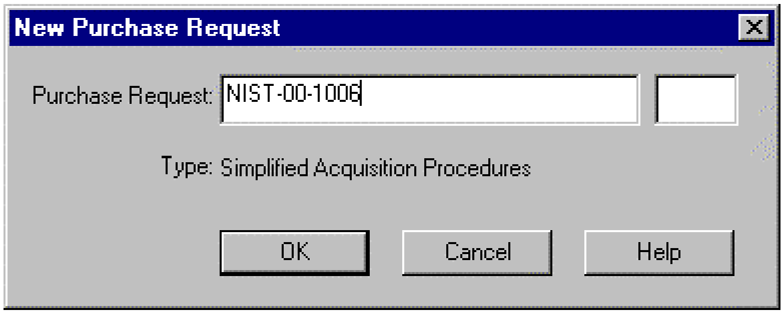


***Figure 9 – New Purchase Request Screen***

From the *New Purchase Request Screen*, users will either enter a purchase request PIIN number or accept the default purchase request number provided.

| Field Name | Field Description |
|---|---|
| Purchase Request number | Purchase Request PIIN Number<br><br>**Field Type:** Max 20 alphanumeric + 3 |

From the *New Purchase Request Screen*, click the *Cancel* button returning users to the *Purchase Request Worksheet*.

To open the purchase request just submitted to purchasing, highlight the purchase request number, select the *Purchase Request* column, and click the *Open* button that will display the *Purchase Request Summary Screen* (fig. 10).

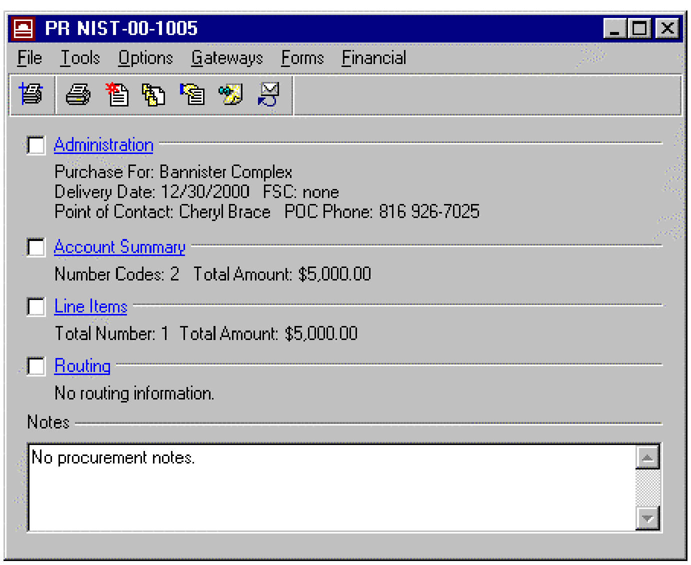


***Figure 10 – Purchase Request Summary Screen***

From the summary screen, users will be able to open any of information related to the purchase request such as the administrative, line item, account summary, and routing information.

From the *Purchase Request Summary Screen* click the *Administration* hyperlink, that will display the *Purchase Request Administrative* portion that includes four tab screens.

The *Admin* tab will display (fig. 11).

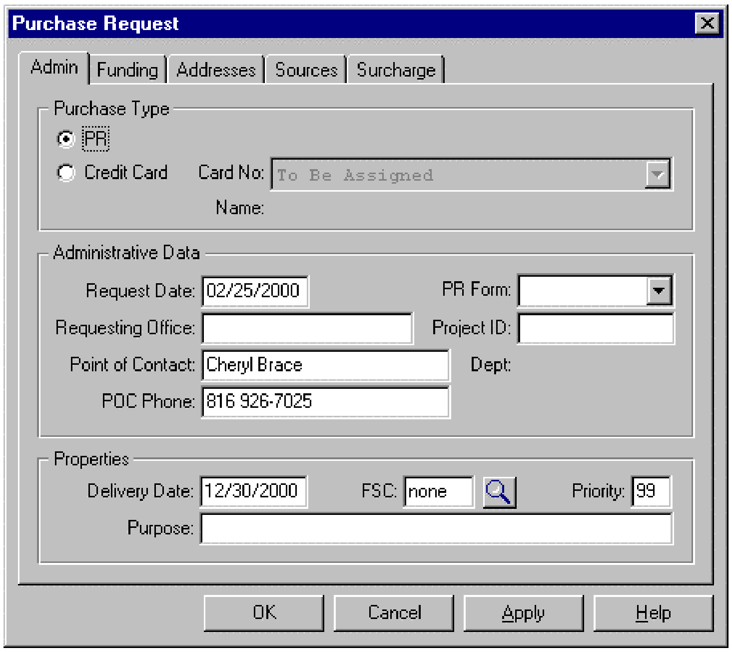


***Figure 11 – Purchase Request Admin Screen***

Enter pertinent information in the following corresponding fields.

Be sure to use the <*TAB*> key to move from field to field.

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Purchase Type** | • PR – purchase type used for ordering supplies/services.<br>• Credit Card – used for purchases that are paid by credit card.<br><br>**Field Type:** 1 character |
| **Request Date** | The purchase request date may represent the day you entered the purchase request into the system, or if the purchase request was submitted from the customer module this date would be the date the Requisitioner submitted his/her requisition to the procurement office.<br><br>**Field Type:** Date field MM/DD/YYYY |
| PR Form | Standard form |

| Field Name | Field Description |
| --- | --- |
| | ***Note:*** *Be sure to select a PR Form type because it automatically carries forward to the File-Print option for the PR.*<br><br>**Field Type:** Max 9 characters Integer |
| **Requesting Office** | Defaults from the admin portion of the requisition.<br><br>**Field Type:** Max 15 alphanumeric characters |
| **Project ID** | Defaults from the admin portion of the requisition as (View Only).<br><br>**Field Type:** Max 8 alphanumeric characters |
| **POC Name** | Defaults the name of the person that is logged into CSTARS.<br><br>***Note****: POC Name should be the person that is most familiar with the requisition. The POC may need to be contacted for questions concerning the requisition purchase.*<br><br>**Field Type:** Max 30 alphanumeric characters |
| **Department** | Defaults from the admin portion of the requisition as (View Only).<br><br>All sites do not use this field. If this requisition is being initiated by or for a specific department, section, group, or team you may identify them here.<br><br>**Field Type:** Max 15 alphanumeric characters |
| **POC Telephone** | Defaults the telephone number of the person that is logged into CSTARS.<br><br>**Field Type:** Max 20 alphanumeric characters |
| **Delivery Date** | Defaults from the admin portion of the requisition.<br><br>Otherwise, enter the delivery date for items/services being procured.<br><br>***Note:*** *The Delivery Date entered on the administrative screen of the requisition, purchase request, solicitation, or award, is copied to each of the line items as you create them.*<br><br>**Field Type:** Date field Format: MM/DD/YYYY |
| **FSC** | Select from a list of Federal Supply Class Codes.<br><br>***Note:*** *If an FSC code had been chosen at the requisition level, then the FSC code would default from the admin portion of the requisition.*<br><br>**Field Type:** Max 4 alphanumeric characters |
| **Priority** | Defaults from the admin portion of the requisition.<br><br>Sites may enable/disable and specify the priority level of procurement.<br><br>**Field Type:** Integer 99 |
| **Purpose** | Defaults from the admin portion of the requisition. |

| Field Name | Field Description |
|---|---|
| | Enter why the supplies are being ordered, or the services being performed. **Field Type:** Max 120 alphanumeric characters |

## Selecting an FSC Code

From the *Purchase Request Admin Screen* users will select a FSC code, by clicking the magnifying glass to the right of the *FSC* code field.

The *FSC Search Screen* will display (fig. 12).

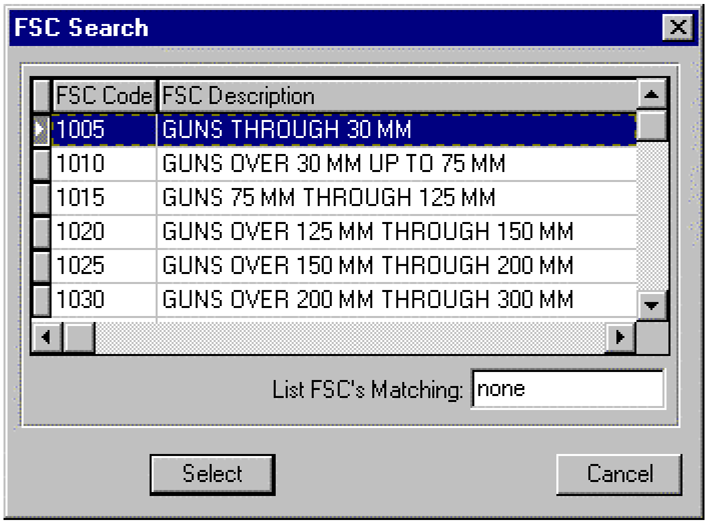


***Figure 12 – FSC Search Screen***

From the text field labeled *"List FSC's Matching"* highlight all text within the text field.

Enter the following in the text field **services** (fig. 13).

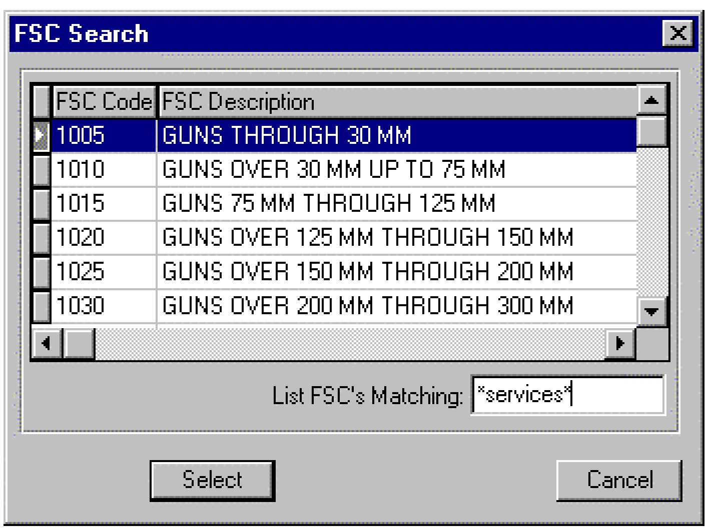


***Figure 13 – FSC Search Screen***

Click the gray column header labeled *"FSC Description,"* that will display all FSC codes that contain the word "services"  (fig. 14).

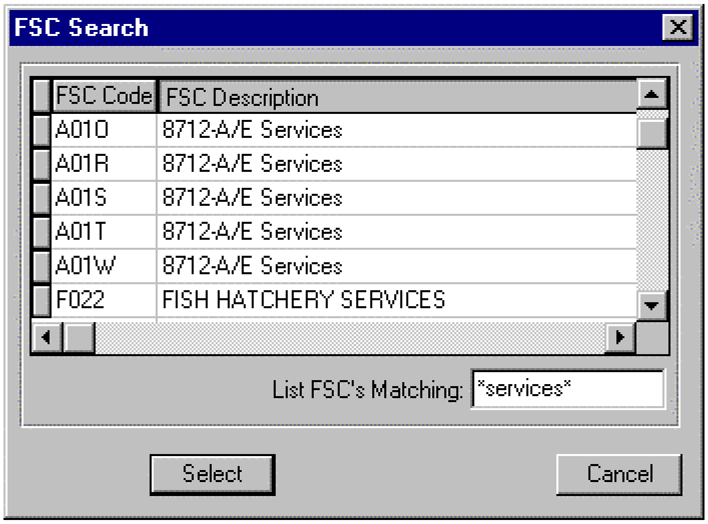


***Figure 14 – FSC Search Screen - FSC codes - Services***

Scroll down the list and highlight the "*A01K A/E Services"* code, then click the *Select* button that will return users to the *Purchase Request Admin Screen* (fig. 15).

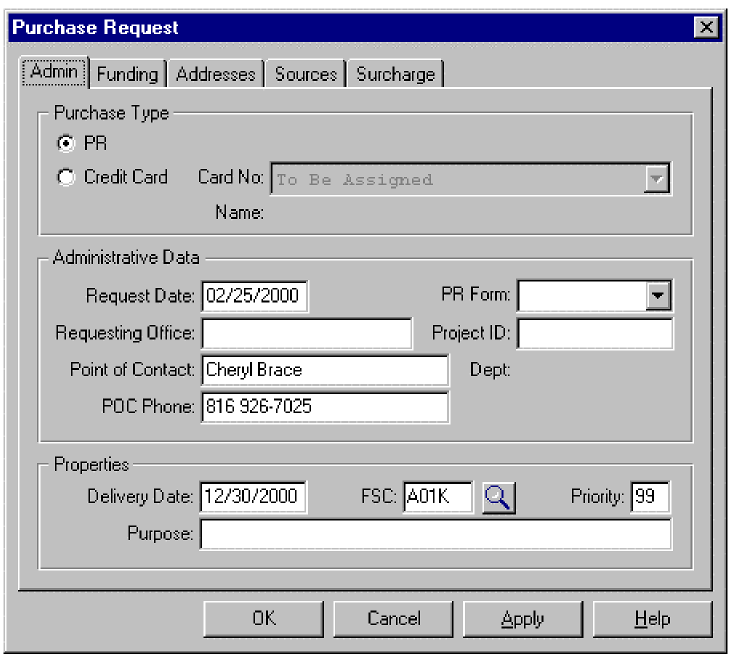


***Figure 15 – Purchase Request Admin Screen - FSC code***

Press the <*TAB*> key a few times until the cursor is positioned in the *Purpose* text field.

Enter text that indicates why the supplies and/or services are being procured (fig. 16)

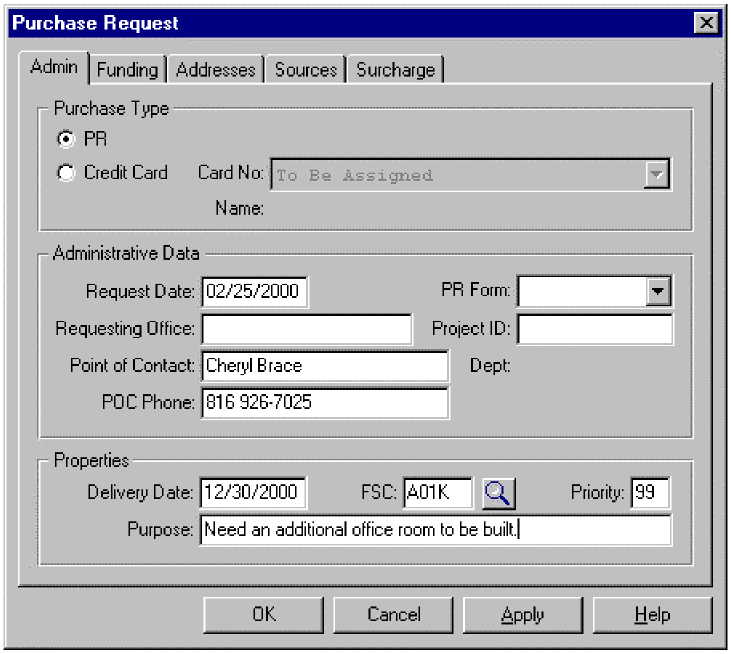


*Figure 16 – Purchase Request Admin Screen - Purpose*

When finished, users will click the *Funding* tab. This will display the *Purchase Request Funding Screen* (fig. 17).

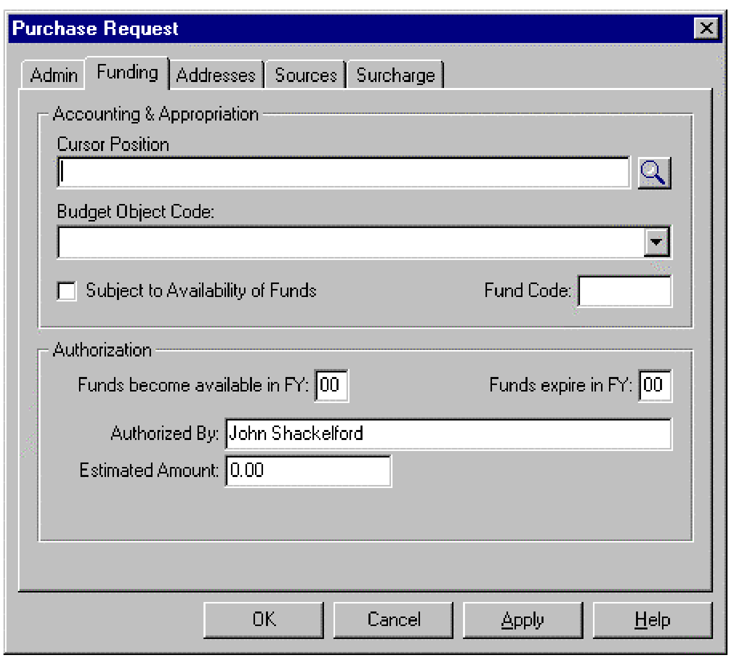


*Figure 17 – Purchase Request Funding Screen*

Enter pertinent information in the following corresponding fields.

Be sure to use the <*TAB*> key to move from field to field.

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Accounting and Appropriation Data** | Enter the accounting code, if applicable.<br><br>***Note:*** *If an accounting had been entered at the requisition level, then the accounting string would default within the accounting & appropriation field at the PR level.*<br><br>**Field Type:** Max 100 alphanumeric characters |
| **BOC** | Enter the Budget Object Code, if applicable.<br><br>***Note:*** *If a BOC had been entered at the requisition level, then the BOC would default within the BOC field at the PR level.*<br><br>**Field Type:** Max 6 alphanumeric characters |
| **Subject to availability to Funds** | Defaults from the admin portion of the requisition.<br><br>When option is checked, indicates that the funds on this acquisition as "not-yet-available."<br><br>**Field Type:** Logical field (Yes/No) |
| **Fund Code** | Defaults from the admin portion of the requisition.<br><br>All sites may not use this field. However, if there is a fund code, name, or other fund identification code for the procurement or for individual line items, enter the data here.<br><br>**Field Type:** Max 4 alphanumeric characters |
| **FY Funds Available** | Defaults from the admin portion of the requisition.<br><br>Enter the fiscal year that the funds become available.<br><br>**Field Type:** Integer 99 |
| **FY Funds Expire** | Defaults from the admin portion of the requisition.<br><br>Enter the fiscal year that the committed funds will expire.<br><br>**Field Type:** Integer 99 |
| **Authorized By** | Defaults from the admin portion of the requisition.<br><br>Enter the name of the supervisor/manager that will approve the funds for the acquisition.<br>**Field Type:** Max 30 alphanumeric characters |
| **Estimated Amount** | Defaults from the admin portion of the requisition.<br><br>The estimated value of the PR is a user updateable field and does not necessarily have to be the total of the line items. |

| Field Name | Field Description |
|---|---|
| | The line items are totaled for the PR and display on the line item browser. The total of the line items is the amount that prints on the Request forms, not the Estimated amount entered by the user.<br><br>**Field Type:** Decimal ->>>,>>>,>>>,>>9.99 |

When finished, users will click the *Addresses* tab, this will display the *Purchase Request Addresses Screen* (fig. 18).

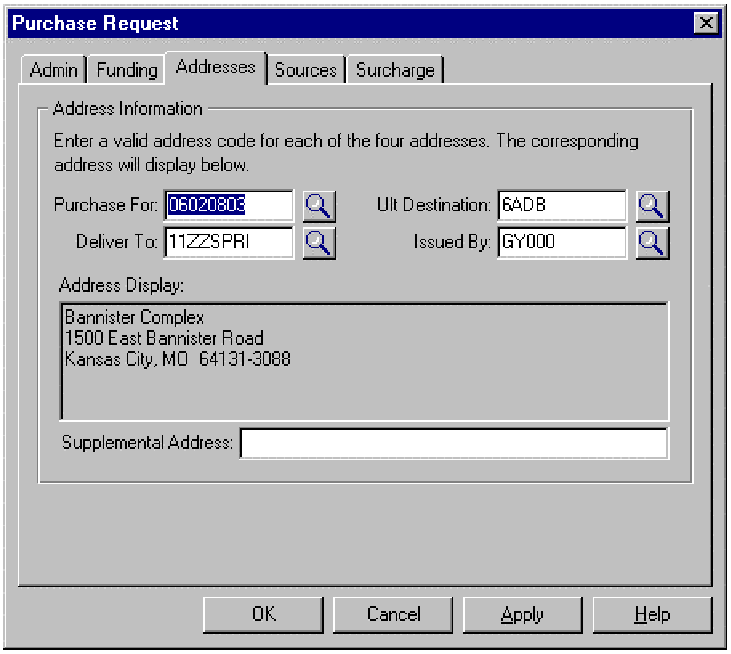


***Figure 18 – Purchase Request Addresses Screen***

All addresses need to be listed in the Address table.

Enter pertinent information in the following corresponding fields. Be sure to use the *<TAB>* key to move from field to field.

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Purchase For** | Defaults from the admin portion of the requisition.<br><br>The address of the office that is ordering the supplies, or requesting the services.<br><br>**Field Type:** Address code Max 8 alphanumeric characters |
| **Ult Destination** | Defaults from the admin portion of the requisition.<br><br>All sites do not use ultimate Destination addresses. If the Deliver To address is the final destination of the items/services being procured, the Ultimate |

| Field Name | Field Description |
|---|---|
| | Destination address is probably not used and may remain blank. However, if the items and/or services are "ultimately" to be provided to a location other than the Deliver To address, then the Ultimate Destination address will represent the location to which the items should be forwarded after delivery. **Field Type:** Address code Max 8 alphanumeric characters |
| **Deliver To** | Defaults from the admin portion of the requisition.<br><br>The address of where the items will be delivered.<br><br>**Field Type:** Address code Max 8 alphanumeric characters |
| **Issued By** | Defaults from the Issued By address field as entered from within the User Profile Screen, Addresses Tab.<br><br>The address code of the office that is issuing the supplies and/or services.<br><br>**Field Type:** Address code Max 8 alphanumeric characters |
| **Supplemental Address** | Defaults from the admin portion of the requisition.<br><br>Enter any additional information in this field (i.e. Loading Dock, Building Number, Room Number).<br><br>**Field Type:** Max 40 alphanumeric characters |

When finished, users will click the *Sources* tab, this will display the *Purchase Request Sources Screen* (fig. 19).

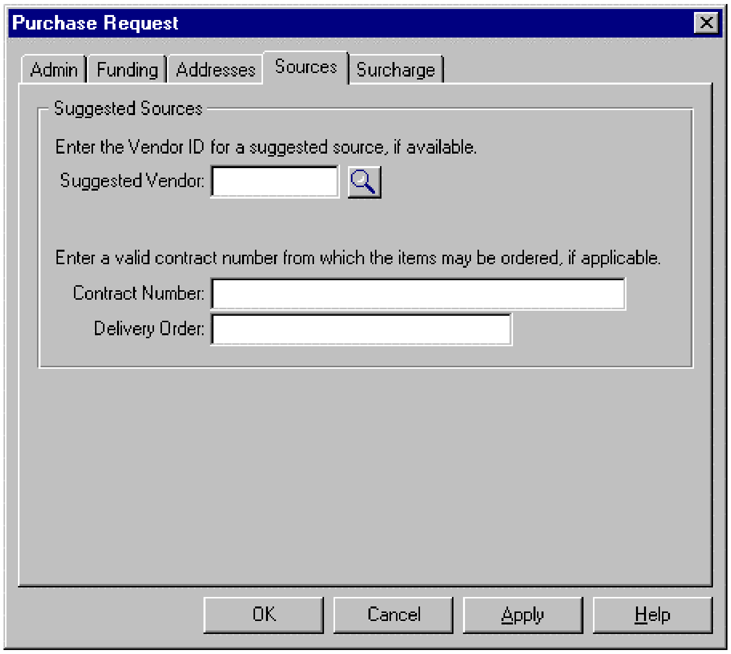


***Figure 19 – Purchase Request Sources Screen***

Enter pertinent information in the following corresponding fields.

Be sure to use the <*TAB*> key to move from field to field.

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Suggested Vendor** | Defaults from the admin portion of the requisition.<br><br>If the items being procured on the requisition come from a known source, then enter the vendor ID.<br>**Field Type:** Max 8 numeric characters |
| **Contract Number** | If the items on this procurement may be ordered from a "Local" requirements or IDIQ type contract. Enter the contract number without any dashes. This will allow the requestor to select line items from previously created delivery orders.<br><br>***Note:*** *The Contract Number can either be entered at the Requisition or Purchase Request level, within the Admin portion of the procurement.*<br><br>**Field Type:** Max 40 alphanumeric characters |
| **Delivery Order** | Enter the delivery order number of the "Local" requirements or IDIQ type contract. Enter the Deliver Order number without any dashes. This will allow the requestor to select line items from previously created delivery orders.<br><br>**Field Type:** Max 30 alphanumeric characters |

When finished, users will click the *Surcharge* tab, this will display the *Purchase Request Surcharge Screen* (fig. 20).

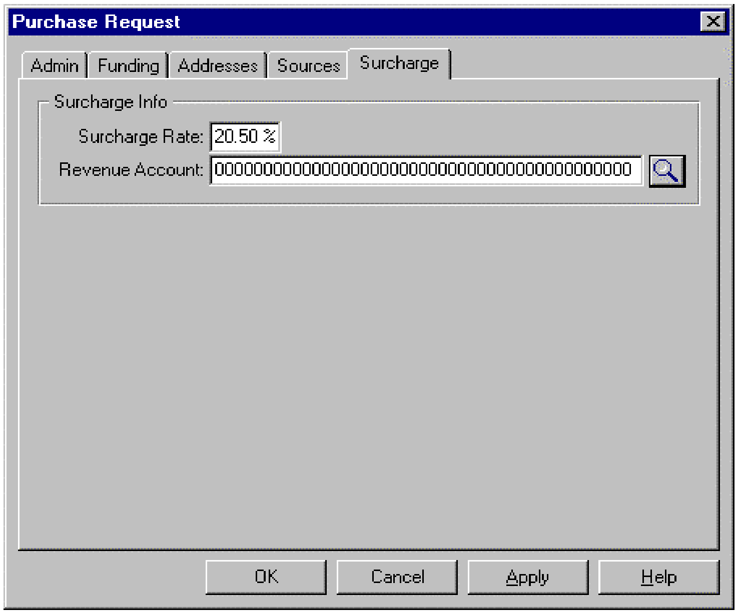


***Figure 20 – Purchase Request Surcharge Screen***

Enter pertinent information in the following corresponding fields.

Be sure to use the <*TAB*> key to move from field to field.

| Field Name | Field Description |
|---|---|
| Surcharge Rate | A surcharge percentage rate may be entered on the PR. This rate will then be applied to the total of all award line items flagged as "Included in Surcharge."<br><br>**Field Type:** 2-digit percent, 2- digit half (i.e. 20.50%) |
| Revenue Account | The revenue accounting classification is to allow for differentiation of funds.<br>**Field Type:** Max. 75 alpha numeric characters |

When finished users will click the *OK* button, this will display the *Purchase Request Summary Screen* (fig. 21).

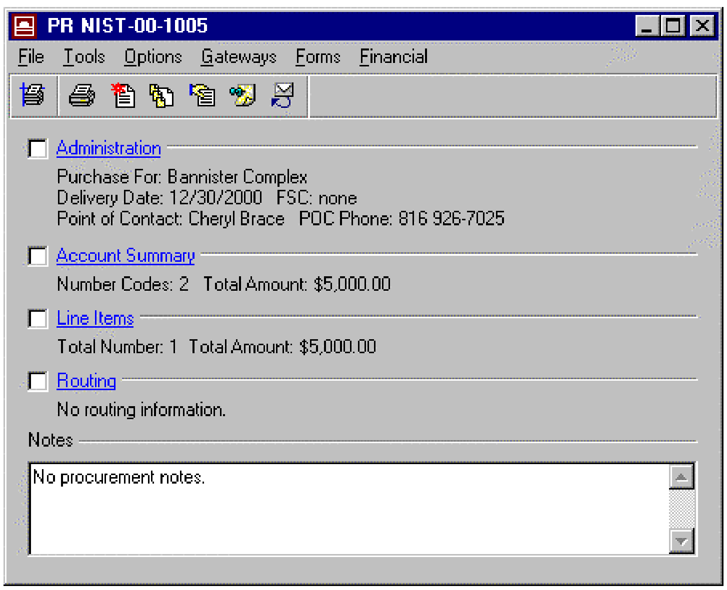


***Figure 21 – Purchase Request Summary Screen***

## View Administration information

Users have the ability to view the Administration, Line Item, and Account Summary information within the purchase request.

To view the Administrative portion of the purchase request, users will select *File/View/Administration* (fig. 22).

*Notice the option to view the Line Item, and Account Summary information as well.*

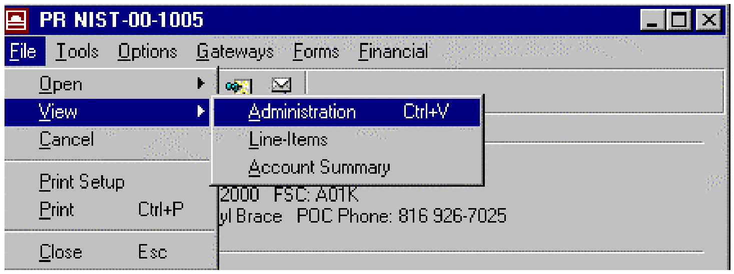


*Figure 22 – Purchase Request Summary Screen - View options*

The *Purchase Request Administration Tab Screens* will display (View only) (fig. 23).

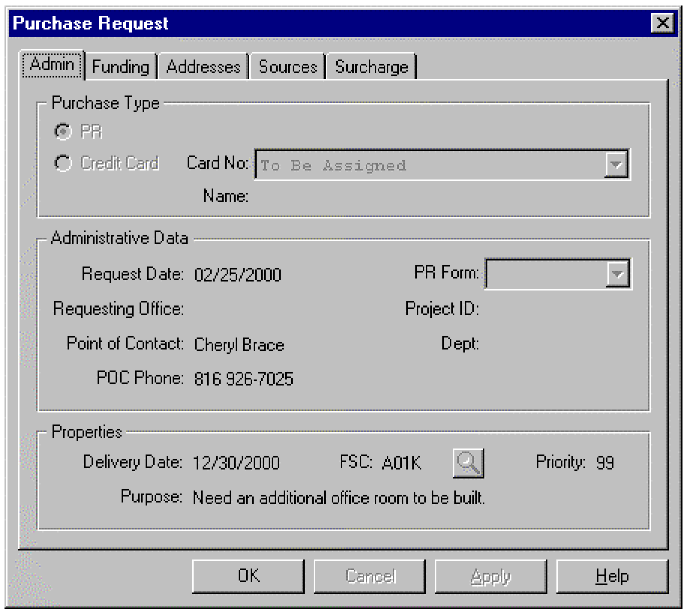


*Figure 23 – Purchase Request Admin Tab Screen - View only*

Users may click each screen tab to view, but not change the administrative information.

When finished, users will click the *OK* button and return to the *Purchase Request Summary Screen.*

## View Line Item information

To view the purchase request line item information, select *File/View/Line Items* from the *Purchase Request Summary Screen.*

The *Purchase Request Line Item Management Browser* will display (View only) (fig. 24).

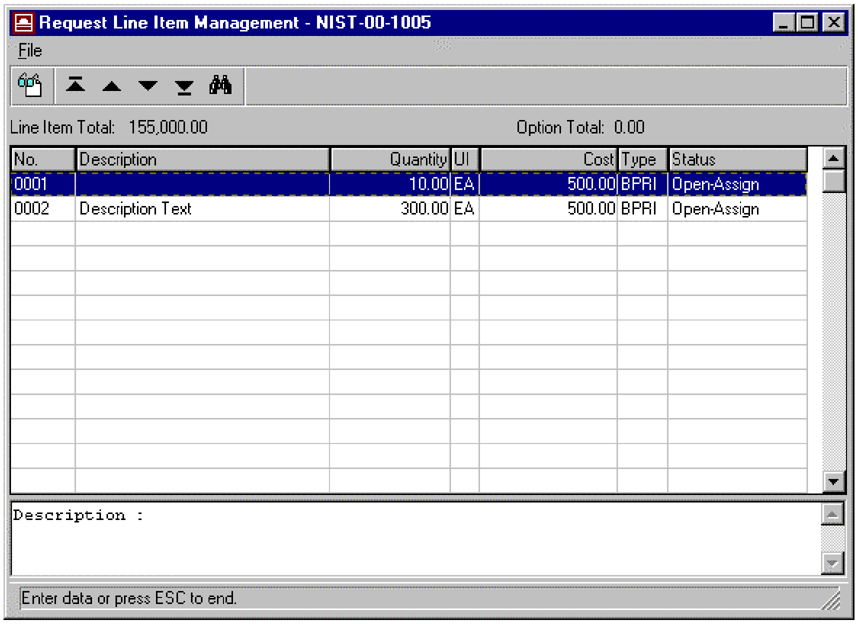


*Figure 24 – Purchase Request Line Item Management Browser- View only*

To view a line item, click the *View Detail* icon on the toolbar (fig. 25).

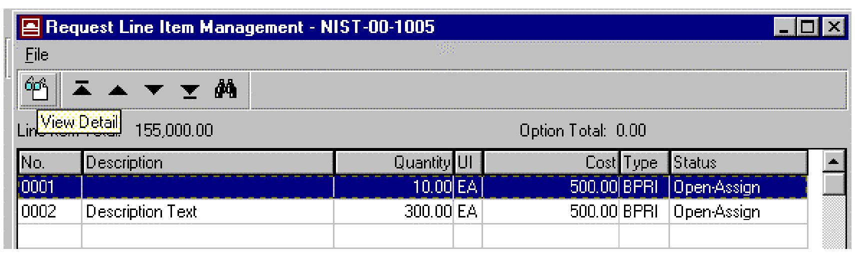


*Figure 25 – Purchase Request Line Item Management Browser- View Detail icon*

The *Purchase Request Line Item Tab Screen* will display (fig. 26).

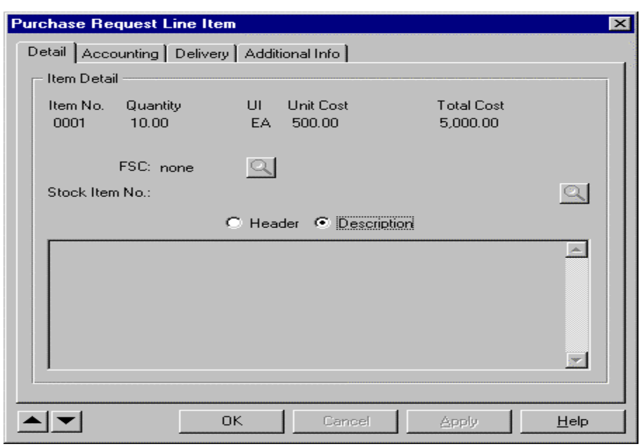


*Figure 26 – Purchase Request Line Item Tab Screens (View only)*

Users may click each screen tab to view, but not change the line item information.

When finished, users will click the *OK* button and return to the *Purchase Request Summary Screen.*

## Account Summary Browser

From the *Purchase Request Summary Screen* users will click the *Account Summary* hyperlink.

The *Account Summary Management Browser* will display (fig. 27).

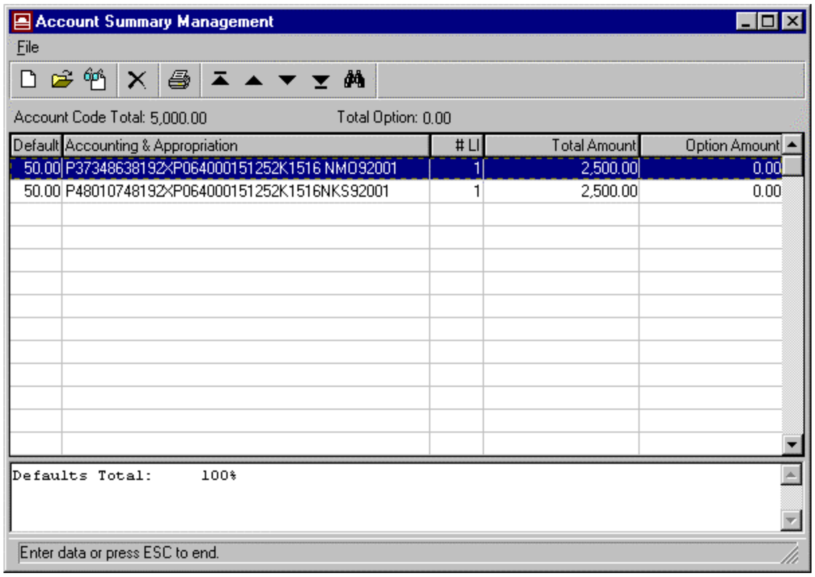


***Figure 27 - Account Summary Management Browser***

Displayed within the *Account Summary Management Browser* are two separate accounting strings, each assigned 50% per account.

Each accounting string pulled from the requisition level within the *Account Summary Management Browser*.

When finished, close the *Account Summary Management Browser* by clicking the *Close* button (X) within the upper right hand corner of the browser.

The *Purchase Request Summary Screen* will display (fig. 28).

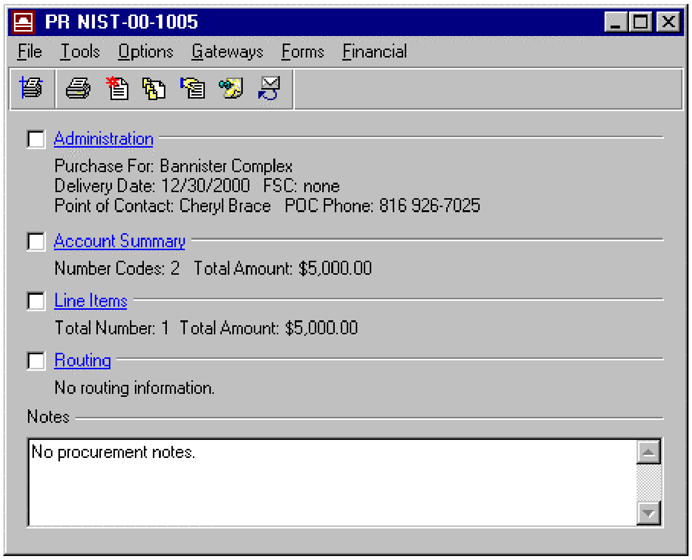


***Figure 28 - Purchase Request Summary Screen***

## Purchase Request Line Item Management Browser

To create and/or modify line items, users will click the *Line Item* hyperlink from the *Purchase Request Summary Screen.*

The *Purchase Request Line Item Management Browser* will display (fig. 29).

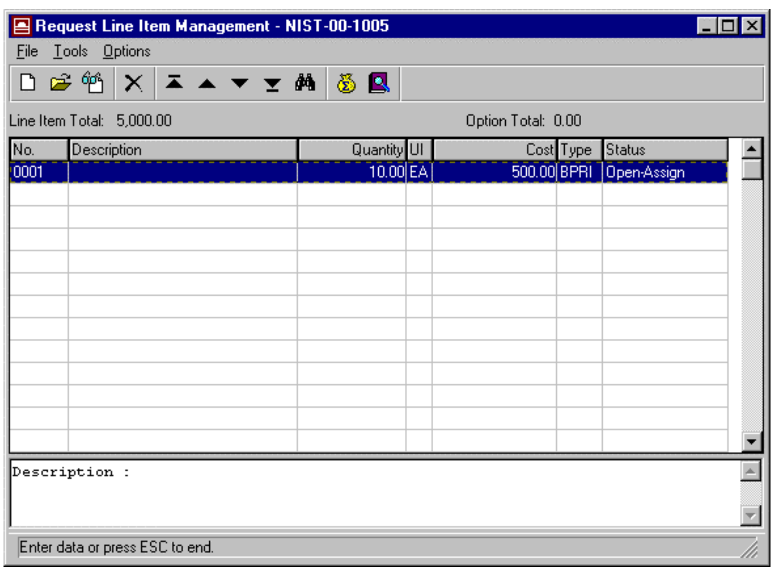


***Figure 29 – Purchase Request Line Item Management Browser***

## Modify Line Items

To modify existing line items, users will highlight the line item, then click the *Open* button, that will display the *Purchase Request Line Item Tab Screens*. Users will then make any necessary changes.

When finished, users will click the *OK* button to save changes and return to the *Purchase Request Line Item Management Browser.*

## Create Line Items

To create new line items, users will click the *New* button, this will display the *Purchase Request Line Item Detail Screen* (fig. 30).

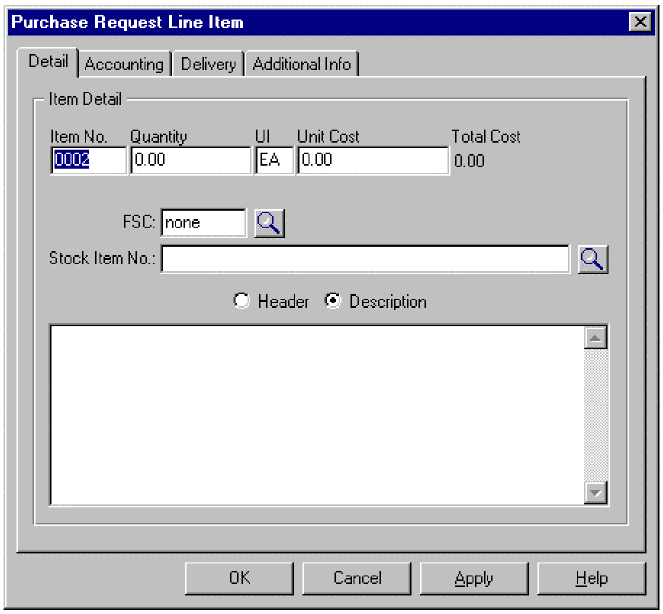


***Figure 30 – Purchase Request Line Item Detail Screen.***

Be sure to press the *<TAB>* to move from field to field on the screen.

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Line Item Number** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.<br><br>Otherwise, users may enter 0001, 0002, 0003 etc for CLINS or you may enter 0001AA<br>0001AB, 0001AC if this item is a SUB-CLIN.<br><br>**Field Type:** Max 6 alphanumeric characters |
| **Quantity** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.<br><br>Otherwise, enter the quantity required for this item.<br><br>**Field Type:** Decimal ->>>,>>>,>>9.99 |

| Field Name | Field Description |
| --- | --- |
| **Unit of Issue** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.  Otherwise, enter the unit of issue for this line item.<br><br>**Field Type:** 2 digit characters |
| **Unit Cost** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.  Otherwise, enter the appropriate unit cost for this item.<br><br>***Note:*** *Once the unit cost is entered, press the <TAB> key will automatically calculate the total cost of the line item.*<br>**Field Type:** Decimal     ->>>>>>>>>>>9.99999 |
| **FSC** | The FSC code defaults from the Administrative portion of the requisition.<br><br>**Field Type:** Max 4 alphanumeric characters |
| **Stock Item Number** | Defaults from the line item at the requisition level.<br><br>Stock Item numbers may be set up for recurring requirement description detail. If a stock item number is entered in this field, and the description field is blank, the Description box will be automatically completed with the Stock Item description.<br><br>**Field Type:** Need to verify |
| **Header Text** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.<br><br>Header text is used for text users would like to have print with the line items, directly above the description enter for that line item.  Each line item may have it is own header text, however, this field is most commonly used as the exception rather than the rule.<br><br>**Field Type:** 300 alphanumeric characters |
| **Description Text** | Line Items that were added from the requisition level will display within the PR Line Item Management Browser.<br><br>When the Description radio button is selected, enter the line item description for the supplies or services being procured.<br><br>**Field Type:** 300 alphanumeric characters |

When finished, users will click the *Accounting* tab this will display the *Purchase Request Line Item Accounting Screen* (fig. 31).

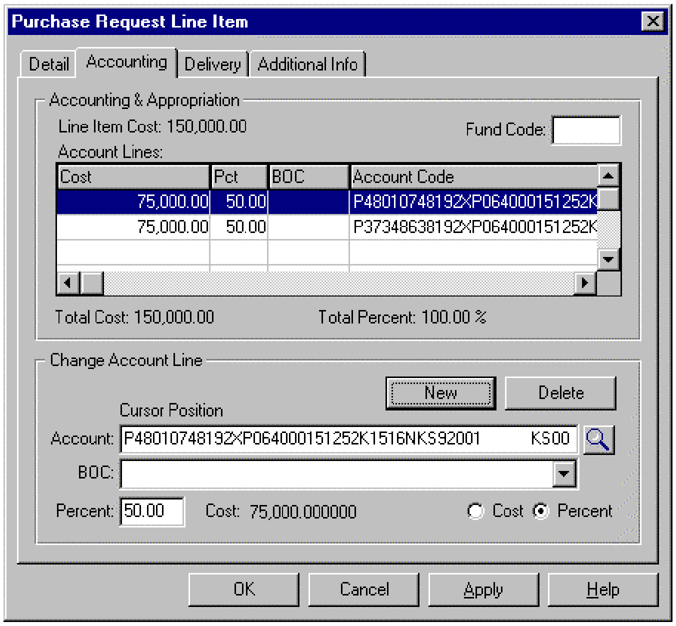

***Figure 31 – Purchase Request Line Item Accounting Screen.***

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Fund Code** | Defaults from the Line Item portion of the requisition. |
| **Account Code** | Defaults from the Line Item portion of the requisition.<br><br>**Field Type:** Max 100 alphanumeric characters |
| **BOC** | Defaults from the Line Item portion of the requisition, if entered.<br><br>**Field Type:** 6 alphanumeric characters |
| **Cost/Percent** | Defaults from the Line Item portion of the requisition.<br><br>Select either the *Cost* or *Percent* radio option.<br><br>Logical field (Yes/No) |

To search for an accounting code, users will click the magnifying glass to the right of the *Account* field.

The *Accounting Search Screen* will display (fig. 32).

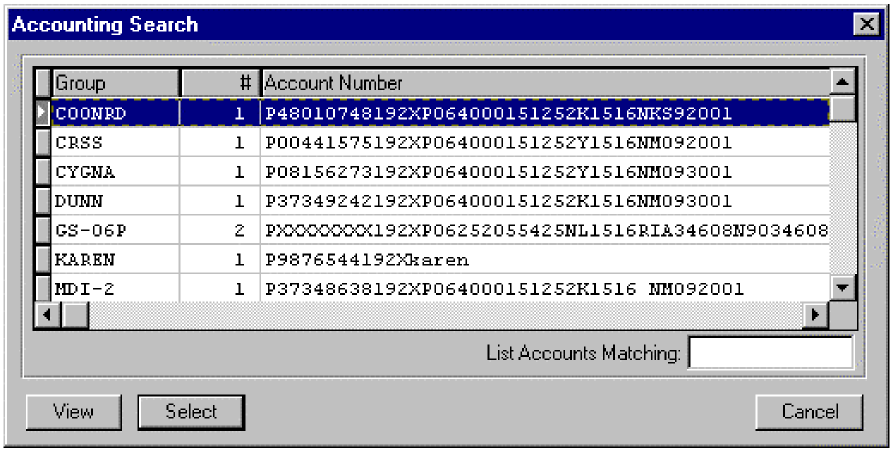

*Figure 32 – Accounting Search Screen*

Users will scroll through the list and highlight an accounting code, then click the *Select* button.

Users will return to the *Accounting Search Screen* with the accounting code displayed in the *Account* field (fig. 33).

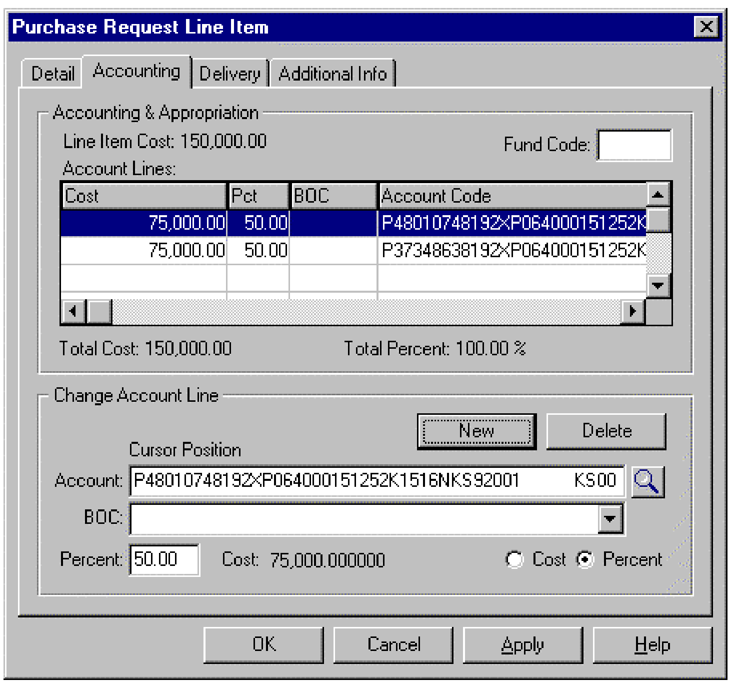

*Figure 33 – Purchase Request Line Item Accounting Screen*

If applicable, select the *BOC* code by clicking the drop-down arrow next to the BOC field (fig. 34).

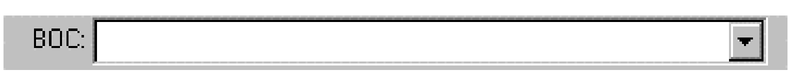

*Figure 34 – BOC drop-down*

Either enter a percentage or cost for this line item by clicking the *Percent* or *Cost* radio buttons (fig. 35-36).


***Figure 35 – Percent radio option***


***Figure 36 – Cost radio option***

When finished, users will click the *Delivery* tab, this will display the *Purchase Request Line Item Delivery Screen* (fig. 37).

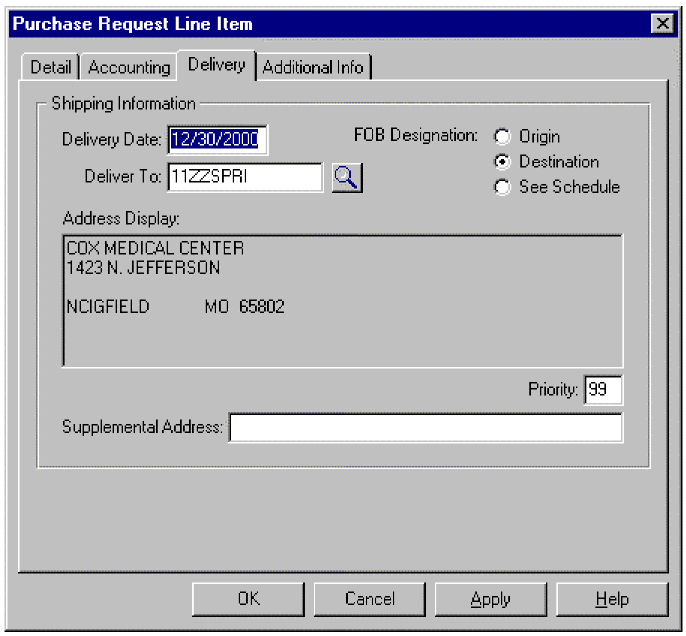


*Figure 37 -* ***Purchase Request Line*** *Item Delivery Screen*

Enter pertinent information in the following fields:

***Note:*** *All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Delivery Date** | Defaults from the Line Item portion of the requisition.<br><br>Otherwise, enter the date that the supplies will be delivered or the date that the services will be performed. Each line item may have the same or different Delivery Dates.<br><br>**Field Type:** Date field MM/DD/YYYY |
| **Deliver To** | Defaults from the Line Item portion of the requisition.<br><br>Otherwise, enter the address that the items will be delivered. Each line |

| Field Name | Field Description |
| --- | --- |
| | item may have the same or different Delivery To. **Field Type:** Address Code max. of 8 alphanumeric characters |
| **FOB Designation** | Defaults from the Line Item portion of the requisition.<br><br>Each line item may have the same or different FOB destination. Users may specify different FOB for each line item.<br><br>**Field Type:** 1 character<br><br>Origin=O Destination=D See Schedule=S |
| **Priority** | Defaults from the Line Item portion of the requisition.<br><br>**Field Type:** Integer 99 |
| **Supplemental Address** | Defaults from the Line Item portion of the requisition.<br><br>Each line item may have the same or a different supplemental address.<br><br>**Field Type:** Max 40 alphanumeric characters |

When finished, users will click the *Additional Info tab* this will display the *Purchase Request Line Item Additional Info Screen* (fig. 38).

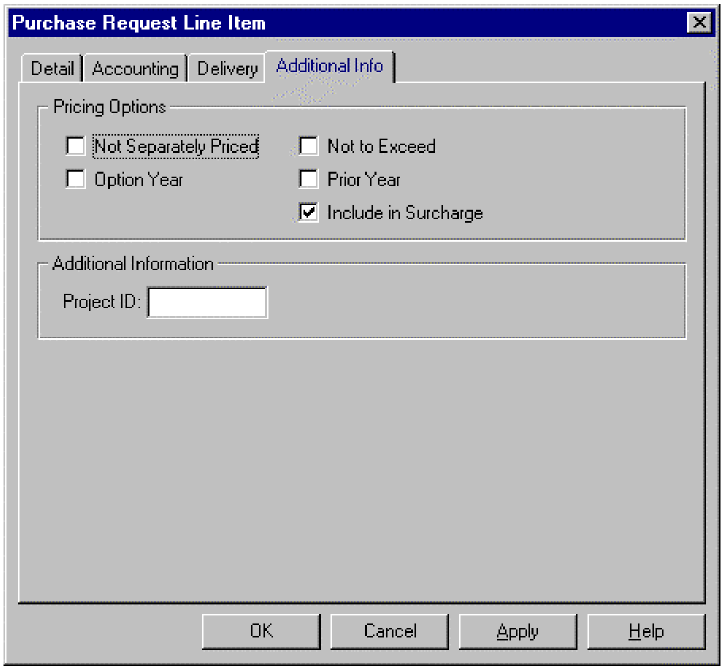

*Figure 38 - **Purchase Request** Line Item Additional Info Screen*

Enter pertinent information in the following fields.

***Note:** All fields that default from the requisition level are highlighted in bold text throughout the document.*

| Field Name | Field Description |
|---|---|
| **Not Separately Priced** | Defaults from the Line Item portion of the requisition. Otherwise, check the box if this item is Not Separately Priced.<br><br>**Field Type:** Logical field (Yes/No) |
| **Option Year** | Defaults from the Line Item portion of the requisition. Otherwise, check the box to designate this item as an Option Year.<br><br>**Field Type:** Logical field (Yes/No) |
| **Not to Exceed** | Defaults from the Line Item portion of the requisition. Otherwise, check box to designate this item as Not To Exceed.<br><br>**Field Type:** 1 character<br>Quantity=Q Unit Cost=U Both=B |
| **Prior Year** | Defaults from the Line Item portion of the requisition.<br><br>Otherwise, check if obligating funds is other than the current year.<br><br>***Note:*** *This field is used when transactions are sent through financial interfaces. Checking this field tells the financial interface that the obligation or deobligation transaction is for funds from a prior fiscal year, not the current fiscal year.*<br>**Field Type:** Logical field (Yes/No) |
| **Include in Surcharge** | Defaults from the Line Item portion of the requisition.<br><br>Otherwise, a surcharge percentage rate may be entered on the PR. This rate will then be applied to the total of all award line items flagged as "Included in Surcharge."<br><br>**Field Type:** This field is a Check Box |
| **Project ID** | Defaults from the Line Item portion of the requisition.<br><br>**Field Type:** Max 8 alphanumeric characters |

When finished, users will click the *OK* button and return to the *Purchase Request Line Item Management Browser* (fig. 39).

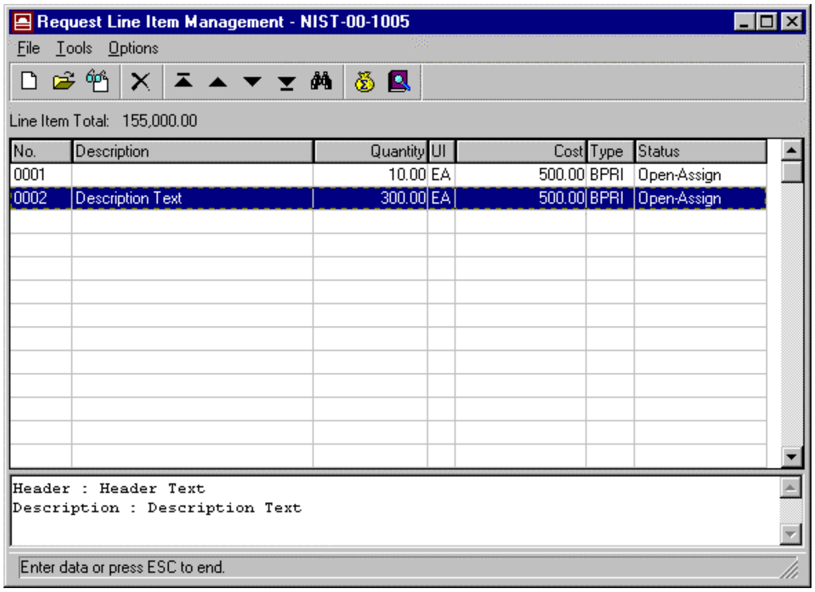


***Figure 39 - Purchase Request Line Item Management Browser***

Click the *Close* button (X) within the upper right hand corner of the *Purchase Request Line Item Management Browser*, and return to the *Purchase Request Summary Screen (fig. 40).*

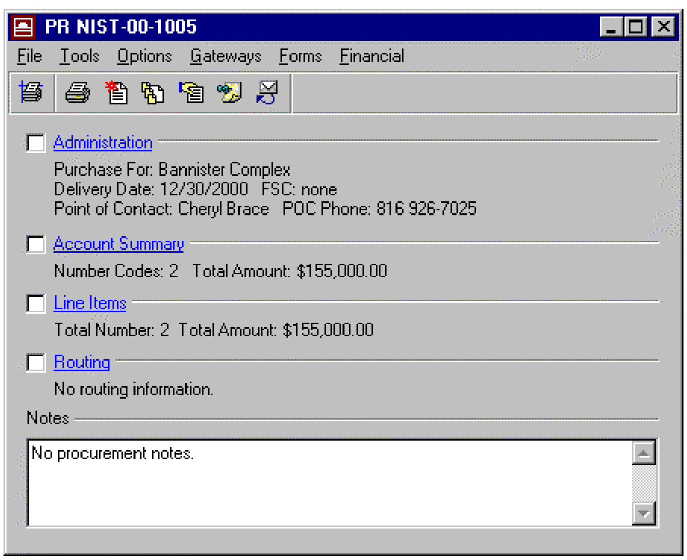


***Figure 40 - Purchase Request Summary Screen***

## Working with Support Documents

Support documents on the browser will all be associated with one procurement action. For example, we will be inserting support documents for our purchase request, as our procurement action that can be routed for approval as well.

To access the *Supporting Documentation Browser*, click the *Support Docs* icon from the *Purchase Request Summary Screen (fig. 41).*

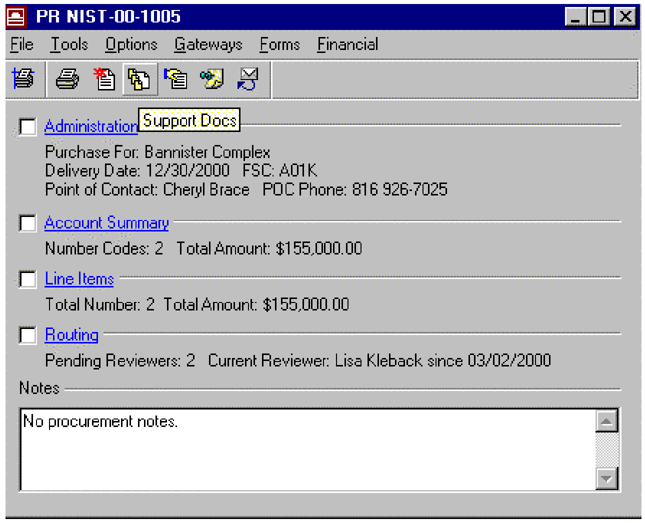


***Figure 41 - Purchase Request Summary Screen - Support Docs***

The *Supporting Documentation Browser* will display (fig. 42).

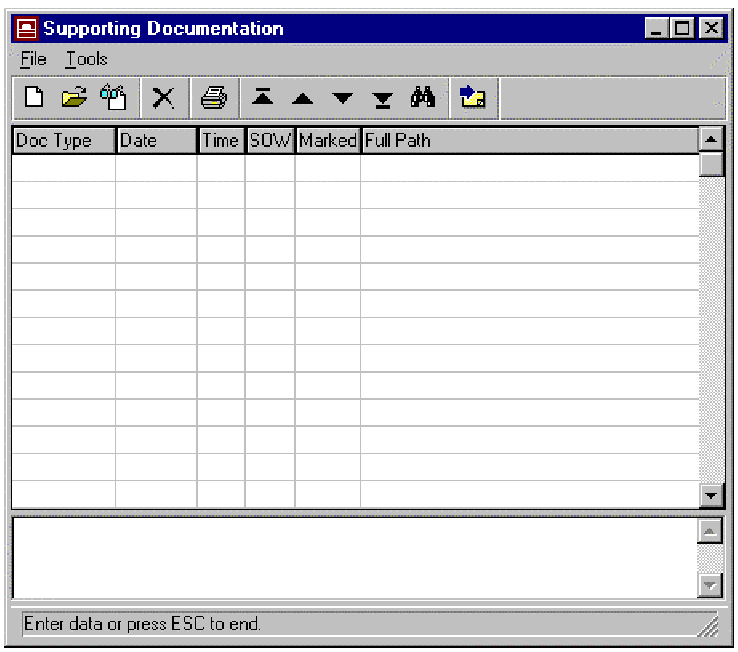


***Figure 42 - Supporting Documentation Browser***

To enter CSTARS, click the *New* button from the browser.

The *Supporting Documentation Screen* will display (fig. 43).

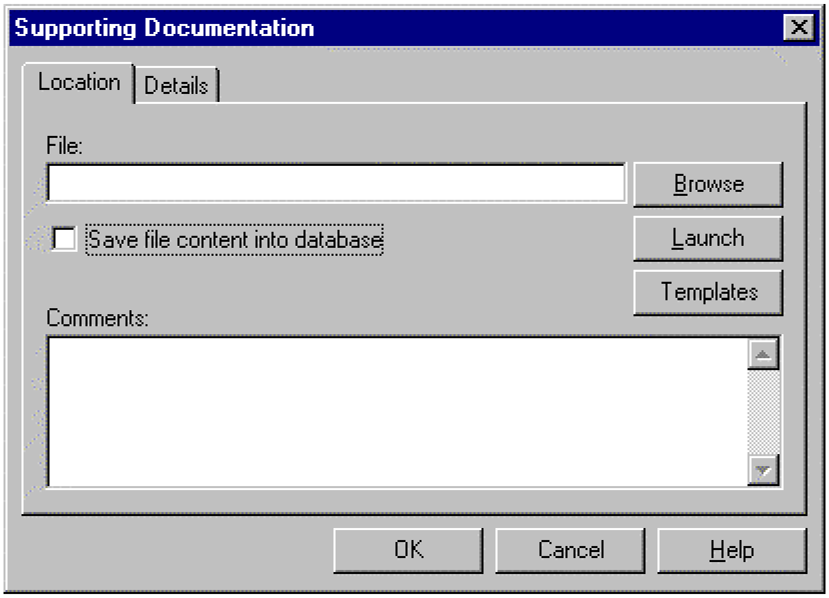


***Figure 43 - Supporting Documentation Screen***

The following fields will display on the *Location Tab Screen*.

| Field Name | Field Description |
|---|---|
| Filename | Manually enter the location and name of the file to be considered as a supporting document.<br><br>**Field Type:** Text field |
| Browse | The Browse button can be used to locate filenames from both local and network drives. |
| Launch | The Launch button can be used to automatically launch the filename within the associated application of which the file was created.<br><br>Users can make editing changes to the document and resave the file. |
| Template | Templates within CSTARS. |
| Save file contents into database (checkbox) | When checked, allows the supporting document to be saved to the database. In order words, if this procurement action were routed to a reviewer for approval, then the reviewer would have the ability to open the supporting document from the database. This is true as long as the reviewer is on a shared drive with the owner of the support document.<br><br>**Field Type:** This field is a Check Box |
| Comments | This is an optional field.<br><br>This field may be used to insert special notations/comments to be routed with this procurement action to a reviewer.<br><br>**Field Type:** Text field |

From the *Location Tab Screen*, click the *Browse* 

button to locate the filename from both local and network drives.

The *Select Supporting Document Screen* will display (fig. 44).

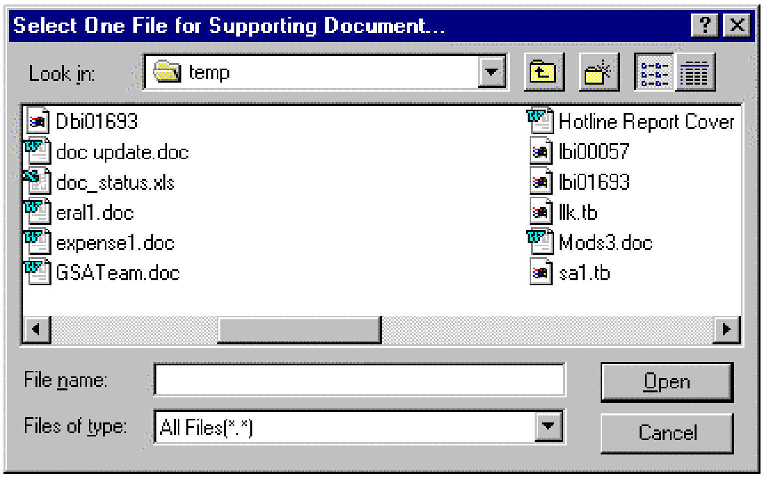


***Figure 44 - Select Supporting Documentation Screen***

Highlight the filename from the list, and click the *Open* button, that will return users to the *Location Tab Screen*, with the selected filename (fig. 45).

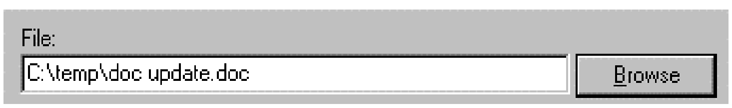


***Figure 45 - Location Tab Screen - Filename***

To launch the filename, click the *Launch* 

button that will automatically launch the application that is associated with the file.

In this example, we selected an MS Word file (.DOC) file format. Once the associated application is launched, users can make editing changes to their document.

***Note:*** *Be sure to resave changes to the revised document.*

Close the associated application and return to the CSTARS *Supporting Documentation Location Tab Screen*.

When routing the procurement action to a reviewer for approval, the reviewer would have the ability to open the supporting document from the database. This is true as long as the reviewer is on a shared drive with the owner of the support document.

To save the supporting document to the database, users will be sure that the checkbox is selected for *" Save file contents into database"* (fig. 46).


***Figure 46 - Location Tab Screen - Checkbox option***

When finished, click the *Details* tab, that will display the *Details Tab Screen* (fig. 47).

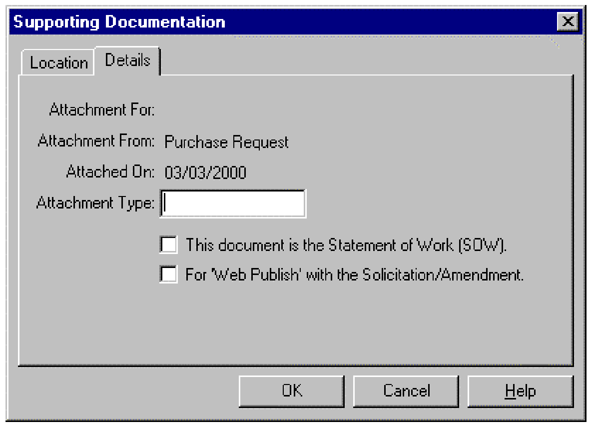


***Figure 47 - Details Tab Screen***

The following fields will display on the *Details Tab Screen*.

| Field Name | Field Description |
|---|---|
| Attachment Type | Used to indicate the application used to create the document, therefore letting the reviewer know if they will be able to launch the supporting document from their PC.<br><br>Otherwise, this field is used to indicate the contents of the supporting document (i.e. Statement of Work (SOW), Section D, etc.)<br><br>**Field Type:** Max. of 12 alphanumeric characters |
| SOW (checkbox) | Used to indicate a supporting document as the Statement of Work.<br><br>***Note:*** *While you can have only one support document designated as the SOW, you can change the file at any time.*<br><br>Once this support document is identified as the Statement of Work, the file can be automatically launched from the SOW Abstract Search screen by clicking on the SOW button.<br><br>**Field Type:** This field is a Check Box |
| Web Publish (checkbox) | This option allows users to specify which supporting documents to be published with the solicitation or amendment when they are published to the web (EDI).<br><br>***Note:*** *Support Documents are NOT sent as attachments, they are* |

| Field Name | Field Description |
|---|---|
| | *sent as an attachment with solicitations or amendments exporting for web publishing only.*<br><br>Some documents may be for internal use only, others are actually a part of the solicitation and/or award package issued to the vendor.<br><br>**Field Type:** This field is a Check Box |

From the *Details Tab Screen*, within the *Attachment Type* field, enter the type of file that will be used for this supporting document, or enter information describing what the contents are for the file (fig. 48).

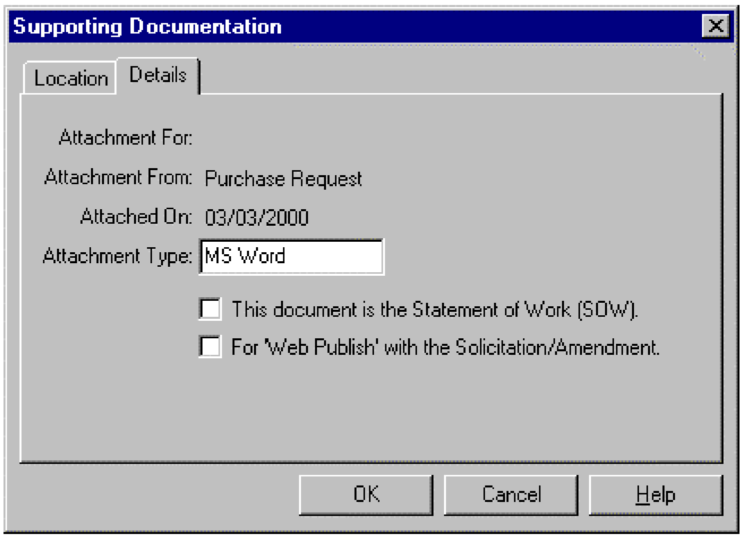


***Figure 48 - Details Tab Screen - Attachment Type***

When specifying that a supporting document will be used to represent the Statement of Work, users will be sure to check the box labeled *"This document is the Statement of Work (SOW)"* (fig. 49).

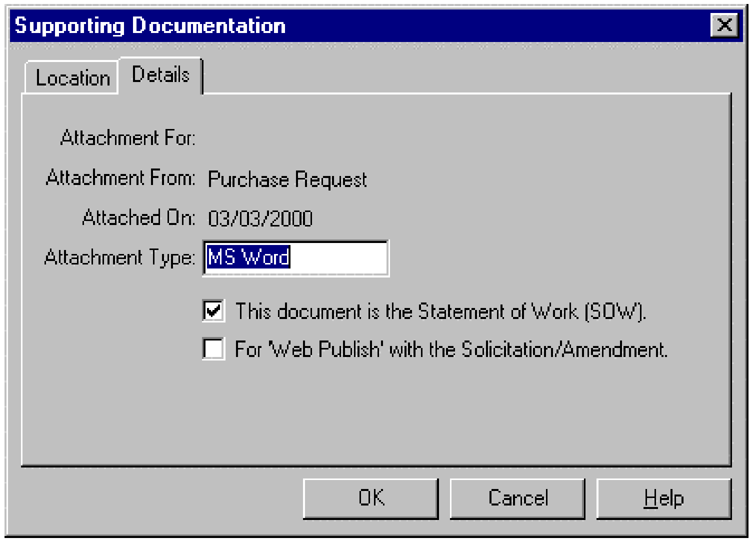

***Figure 49 - Details Tab Screen - SOW option***

Check the box labeled *"For Web Publish with the Solicitation/Amendment,"* to specify which supporting documents to be published with the solicitation or amendment when they are published to the web (fig. 50).

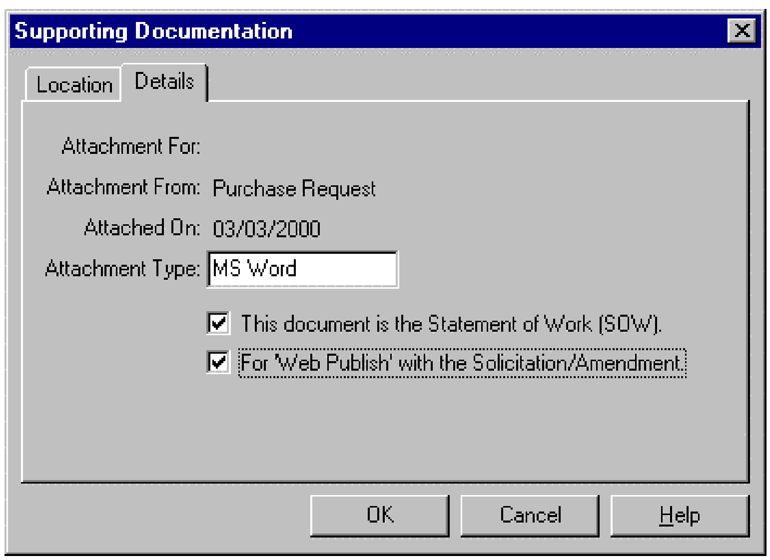

***Figure 50 - Details Tab Screen - Web Publish option***

For this example, we will unmark the check for *"Web Publishing."* Be sure that the Statement of Work check box <u>is selected</u>.

When finished, click the *OK* button that will display the following information message (fig. 51).

*Figure 51 - Information Message*

Click the *OK* button returning users to the *Supporting Documentation Browser* (fig. 52).

Notice that the support document is identified as an MS Word document, and identified as a Statement of Work.

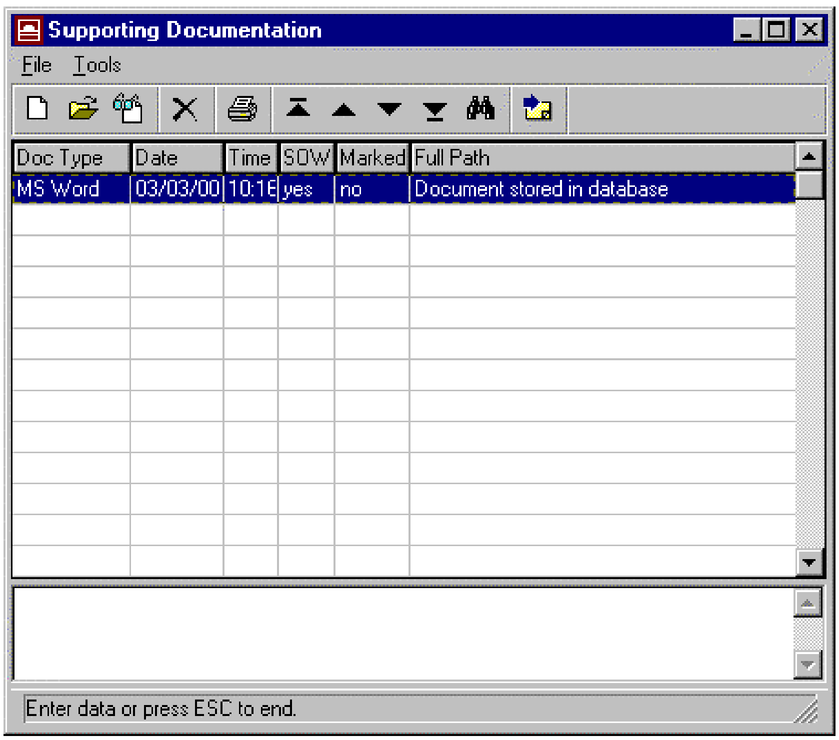

*Figure 52 - Supporting Documentation Browser*

## Routing a Purchase Request

To route the purchase request, users will click the *Route* hyperlink from the *Purchase Request Summary Screen*.

The *Route List Screen* will display (fig. 53).

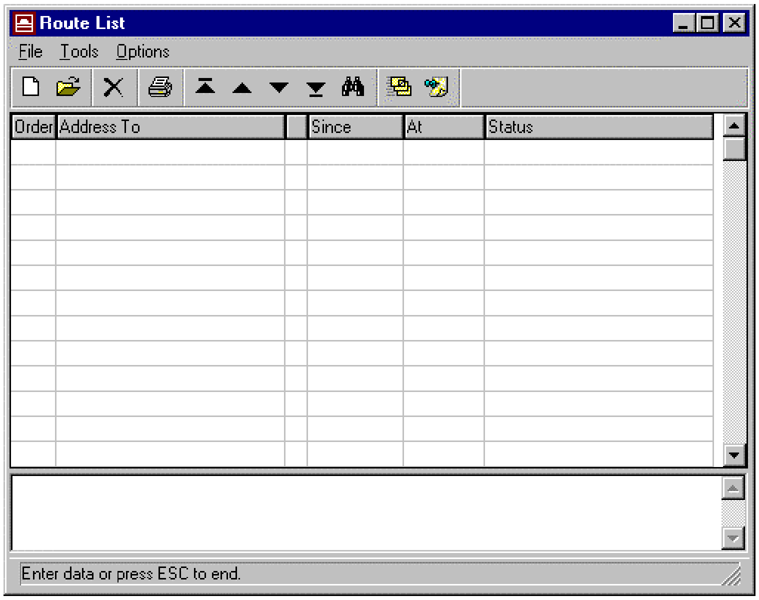


*Figure 53- Route List Browser*

Users may choose from a list of Route Models, by selecting *Tools/Model* from the *Route List Browser* (fig. 54).

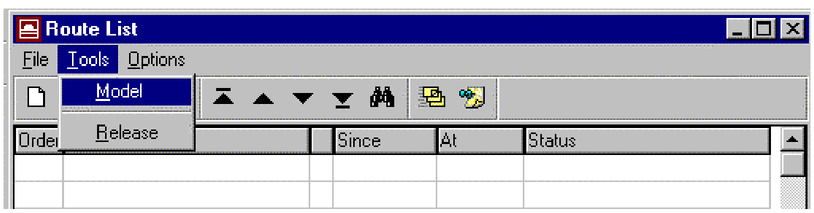


*Figure 54 - Route List Browser*

The *Route List Model Screen* will display (fig. 55).

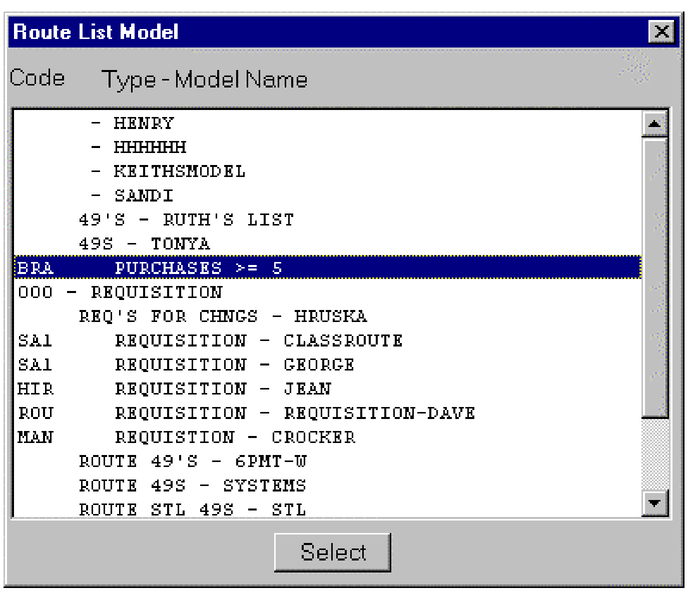


*Figure 55 - Route List Model Screen*

Select a route list model, then click the *Select* button, and return to the Route *List Browser*.

Otherwise, to set up a new route list, users will click the *New* button from the *Route List Browser* (fig. 56).

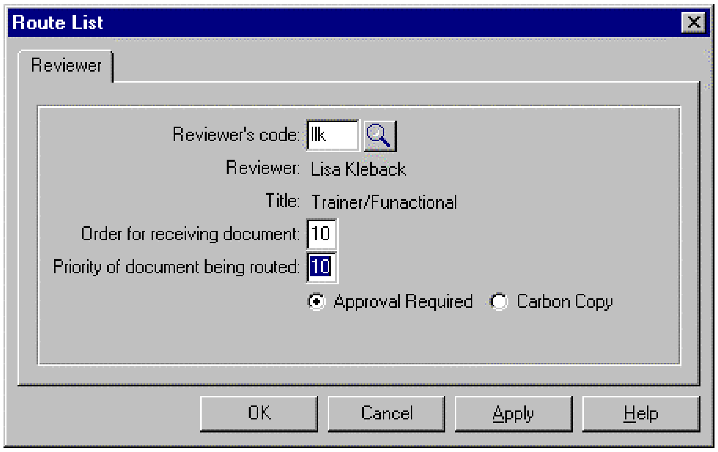


***Figure 56 - Route List Screen***

Enter the 3-digit User ID within the *Reviewer's Code* field. In addition, enter the order in which the reviewer will receive the item, as well as entering the priority of document being routed.

Specify one of the following radio options:

- Approval Required
- Carbon Copy

Click the *OK* button and users will return to the *Route List Browser*.

Repeat the previous steps to add additional reviewer's (fig. 57).

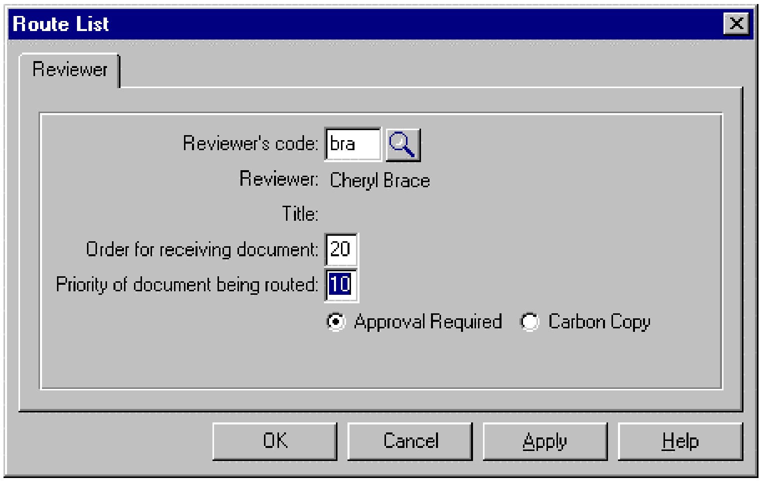


***Figure 57 - Route List Screen***

When finished, users will click the *OK* button and return to the *Route List Browser* that displays both reviewers (fig. 58).

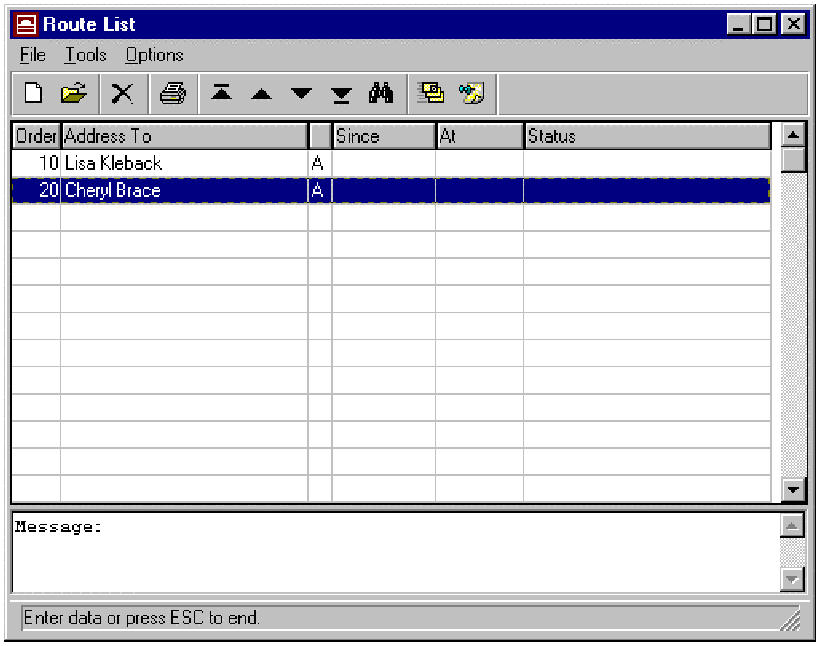


***Figure 58 - Route List Browser***

To begin the routing process, users will click the *Release* button from the *Route List Browser*, this will display the status of the route list as "Review Pending" (fig. 59).

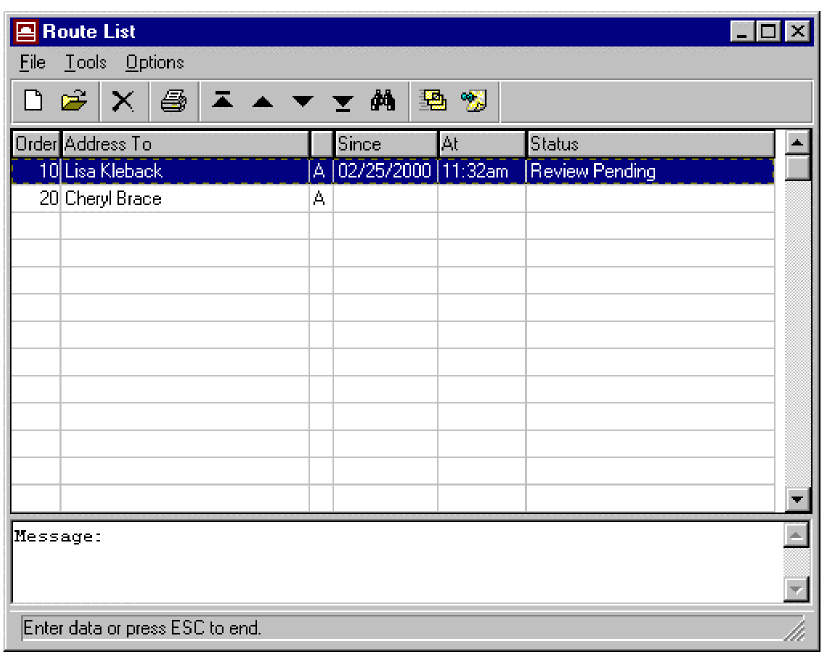


***Figure 59 - Route List Browser - Review Pending Status***

Close the *Route List Browser* and users will return to the *Purchase Request Summary Screen* that displays the current status and reviewer's name for this particular record (fig. 60).

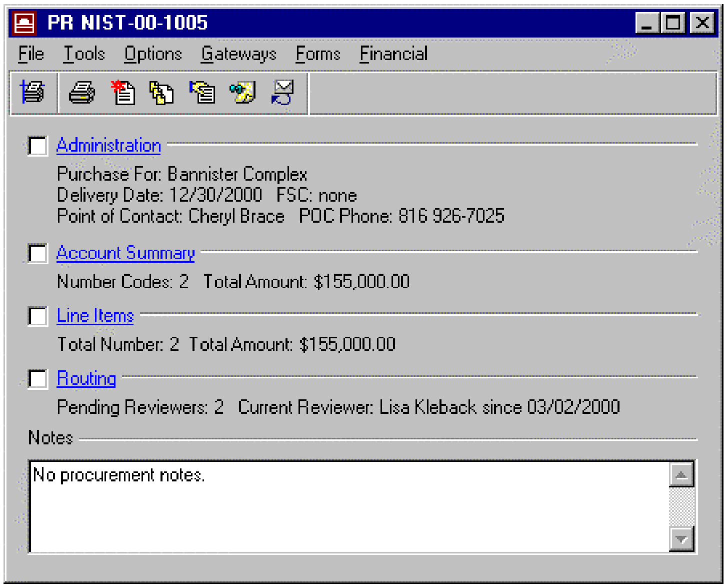


***Figure 60 - Purchase Request Summary Screen***