

# **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).

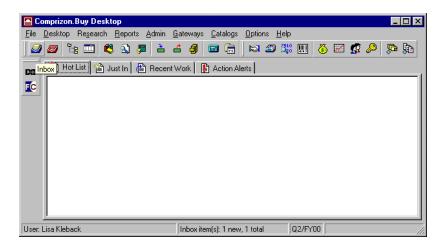


Figure 1 - CSTARS desktop

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).

ew F	RI Rece	eived Fror	m At	Туре	Reference Number	Item	
s	10 02/2	5/00 BR/	4 3:23pm	Арр	NIST-00-1005	Requisition	
_							
_							
-	_						
-							
-							
_							

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).

Customer Requisition NIST-00-1005	. 🗆 ×
<u>File T</u> ools <u>Options</u> <u>Forms</u> <u>Financial</u>	
🍯 🖨 🔁 🏷 🖻	
Administ Submit Requisition	
Deliver To: COX MEDICAL CENTER Delivery Date: 12/30/2000 FSC: none Authorized By: John Shackelford	
Account Summary Number Codes: 2 Total Amount: \$5,000.00	
Total Number: 1 Total Amount: \$5,000.00	
Routing Pending Reviewers: 2 Current Reviewer: Lisa Kleback since 02/25/2000	
Notes	
No procurement notes.	4

Figure 3 - Customer Requisition Summary Screen

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

Submit Requisition	2
Submit	
FSC: none	
Requisition No.: NIST-00-1005 Purchase Request No.: NIST-00-1005	
Procurement Dept.:	ion
Assign To:	
<u> </u>	Cancel <u>H</u> elp

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.

Review & Approval         File Iools Options         Image: Second	Appr	Disapprove	
New       PRI       Received       From       At       Type       Reference Number       Item       A         no       10       02/25/00       BRA       3:23pm       App       NIST-00-1005       Requisition	<u>File T</u> ools <u>O</u> ptions		
no         10         02/25/00         BRA         3:23pm         App         NIST-00-1005         Requisition           Image: Second	New PRI Received Fr	m At Type Reference Number	
Image: Section of the section of t	no 10 02/25/00 BF	A 3:23pm App NIST-00-1005	Requisition
1 $1$			
Image: Second			
			<b></b> 1
			-
			<b>T</b>

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).

11			▼		
<sup>p</sup> ri Typ	e RDD	Project	Requisition	Purchase Request	Status
39			GS-06P-00-CUC-1001		Unsubmitted
39			XXX06-PMT -99-0826		Unsubmitted
39	12/30		NIST-00-2001		Unsubmitted
99 C			GS-06P-00-CUC-0001	GS-06P-00-CUC-1010	Submitted
39 S	12/30		NIST-00-1005	NIST-00-1005	Submitted
99 S	03/02		XXXX06-PMT -99-0831	XXXX06-PMT -99-0831	Submitted

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).

	omprizor	n.Buy D	eskta	р															-	
<u>F</u> ile	<u>D</u> esktop	Re <u>s</u> ea	irch <u>I</u>	<u>R</u> epor	ts <u>A</u>	dmin	<u>G</u> at	eway	s <u>C</u> a	talogs	<u>O</u> ptic	ins I	<u>H</u> elp							
	Ø	is 💷	8	3	<del>5</del>	à	đ	6		ē.	ka	٢	7510 Dgo	Щ,	3	×	<u>8</u>	$\mathcal{P}$	<b>\$</b>	<b>B</b>
	💾 Ho	ot Li:	<u>C</u> usto	mer			_/	ork Ì	🖪 A	tion Al	erts									
CO			<u>P</u> urch	asing								en sabr	10.274							
FC			Contr	acting																
100			C <u>a</u> talo	og Cor	ntract	ng														
and the	device a		Supe	rvision																
			Custo			ision														
1996							-													
			Invoid	ang																
	10																			
User:	Lisa Kleb	ack					h	nbox i	tem(s)	0 new	, 1 tota	al		22/F1	200					

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.

pen PRs	< ▲ ▲ ▼ ★ ♣ ₪			
Project	C 🗹 Purchase Request	Solicitation	M 🗖 Award	
	NIST-00-1005			
	NIST-00-1001			
atus: 0	)pen-Assign			

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).

New Purchase Request	×
Purchase Request: NIST-00-1006	
Type: Simplified Acquisition	Procedures
ОК	Cancel Help

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	Purchase Request PIIN Number
Request number	
	<b>Field Type:</b> 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).

PR NIST-00-1005	_ 🗆 ×
<u>File T</u> ools <u>Options G</u> ateways <u>F</u> orms <u>F</u> inancial	
「 日本 「 「 「 」 「 」 「 」 」 「 」 」 」 「 」 」 」 」 」	
Administration	
Purchase For: Bannister Complex Delivery Date: 12/30/2000 FSC: none Point of Contact: Cheryl Brace POC Phone: 816 926-7025	
Account Summary Number Codes: 2 Total Amount: \$5,000.00	
Total Number: 1 Total Amount: \$5,000.00	
Routing	
No routing information.	
Notes	
No procurement notes.	4

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).

Purchase Request
Admin Funding Addresses Sources Surcharge
Purchase Type
◯ Credit Card Card No: To Be Assigned
Name:
Administrative Data
Request Date: 02/25/2000 PR Form:
Requesting Office: Project ID:
Point of Contact: Cheryl Brace Dept:
POC Phone: 816 926-7025
Properties
Delivery Date: 12/30/2000 FSC: none Q Priority: 99
Purpose:
OK Cancel Apply Help

Figure 11 – Purchase Request Admin Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the  $\langle TAB \rangle$  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.							
	• Credit Card – used for purchases that are paid by credit card.							
	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.							
	Field Type: Date field MM/DD/YYYY							
PR Form	Standard form							

Field Name	Field Description
	<i>Note:</i> Be sure to select a PR Form type because it automatically carries
	forward to the File-Print option for the PR.
Requesting	Field Type: Max 9 charactersIntegerDefaults from the admin portion of the requisition.
Office	Defaults from the admin portion of the requisition.
	Field Type: Max 15 alphanumeric characters
Project ID	Defaults from the admin portion of the requisition as (View Only).
	Field Type: Max 8 alphanumeric characters
POC Name	Defaults the name of the person that is logged into CSTARS.
	<i>Note</i> : <i>POC Name should be the person that is most familiar with the</i>
	requisition. The POC may need to be contacted for questions concerning the
	requisition purchase.
	Field Type: Max 30 alphanumeric characters
Department	Defaults from the admin portion of the requisition as (View Only).
	All sites do not use this field. If this requisition is here spitiated have for a
	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.
POC Telephone	<b>Field Type:</b> Max 15 alphanumeric characters
POC Telephone	Defaults the telephone number of the person that is logged into CSTARS.
	Field Type: Max 20 alphanumeric characters
Delivery Date	Defaults from the admin portion of the requisition.
	Otherwise, enter the delivery date for items/services being procured.
	<i>Note:</i> 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.
	Field Type: Date field Format: MM/DD/YYYY
FSC	Select from a list of Federal Supply Class Codes.
	<i>Note:</i> If an FSC code had been chosen at the requisition level, then the FSC code would default from the admin portion of the requisition.
Duiovity	Field Type: Max 4 alphanumeric characters
Priority	Defaults from the admin portion of the requisition.
	Sites may enable/disable and specify the priority level of procurement.
	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).

F	SC Sear	ch	×
	FSC Co	ode FSC Description	
	1005	GUNS THROUGH 30 MM	
	1010	GUNS OVER 30 MM UP TO 75 MM	
	1015	GUNS 75 MM THROUGH 125 MM	
	1020	GUNS OVER 125 MM THROUGH 150 MM	
	1025	GUNS OVER 150 MM THROUGH 200 MM	
	1030	GUNS OVER 200 MM THROUGH 300 MM	-
1			
and the second		List FSC's Matching: none	
		Select	Cancel

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).

FS	SC Search		×
	FSC Code	FSC Description	
	1005	GUNS THROUGH 30 MM	1
	1010	GUNS OVER 30 MM UP TO 75 MM	
	1015	GUNS 75 MM THROUGH 125 MM	
	1020	GUNS OVER 125 MM THROUGH 150 MM	
	1025	GUNS OVER 150 MM THROUGH 200 MM	
	1030	GUNS OVER 200 MM THROUGH 300 MM	-
	•	<u>)</u>	
the second second		List FSC's Matching: services	
	[	Select	cel

Figure 13 – FSC Search Screen

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

SC Search		2
FSC Code	FSC Description	
A010	8712-A/E Services	
A01R	8712-A/E Services	
A01S	8712-A/E Services	
A01T	8712-A/E Services	
A01W	8712-A/E Services	
F022	FISH HATCHERY SERVICES	-
•	Þ	$\square$
	List FSC's Matching: services*	
ſ	Select Can	cel

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).

Purchase Request
Admin Funding Addresses Sources Surcharge
Purchase Type
⊙ PB
C Credit Card No: To Be Assigned
Name:
Administrative Data
Request Date: 02/25/2000 PR Form:
Requesting Office: Project ID:
Point of Contact: Cheryl Brace Dept:
POC Phone: 816 926-7025
Properties
Delivery Date: 12/30/2000 FSC: A01K Q Priority: 99
Purpose:
OK Cancel <u>A</u> pply <u>H</u> elp

Figure 15 – Purchase Request Admin Screen - FSC code

Press the  $\langle TAB \rangle$  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)

Purchase Request
Admin Funding Addresses Sources Surcharge
Purchase Type
• PR
🔿 Credit Card 🛛 Card No: To Be Assigned 🔽
Name:
Administrative Data
Request Date: 02/25/2000 PR Form:
Requesting Office: Project ID:
Point of Contact: Cheryl Brace Dept:
POC Phone: 816 926-7025
Properties
Delivery Date: 12/30/2000 FSC: A01K Q Priority: 99
Purpose: Need an additional office room to be built.
OK Cancel Apply Help

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).

Purchase Request	×
Admin Funding Addresses Sources Surcharge	
Accounting & Appropriation	
Cursor Position	
<b> </b>	<u> </u>
Budget Object Code:	
<b> </b>	
Subject to Availability of Funds Fund Code:	
Authorization	
Funds become available in FY: 00 Funds expire in	n FY: 00
Authorized By: John Shackelford	
Estimated Amount: 0.00	
OK Cancel Apply	<u>H</u> elp

Figure 17 – Purchase Request Funding Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the  $\langle TAB \rangle$  key to move from field to field.

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

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

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.	
	<b>Field Type:</b> Decimal ->>>,>>>,>>9.99	

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

Purchase Request	×
Admin       Funding       Addresses       Sources       Surcharge         Address       Information         Enter a valid address code for each of the four addresses. The corresponding address will display below.         Purchase For:       05020803       Q       Ult Destination:       6ADB       Q         Deliver To:       11ZZSPRI       Q       Issued By:       GY000       Q         Address Display:       Bannister Complex       1500 E ast Bannister Road       Kansas City, MD       64131-3088	
Supplemental Address: OK Cancel Apply Help	

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  $\langle TAB \rangle$  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	
<b>Purchase For</b>	Defaults from the admin portion of the requisition.	
	The address of the office that is ordering the supplies, or requesting the services. <b>Field Type:</b> Address code Max 8 alphanumeric characters	
Ult Destination	Defaults from the admin portion of the requisition.	
	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.							
	The address of where the items will be delivered.							
	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.							
	The address code of the office that is issuing the supplies and/or services.							
	Field Trunce Address and May 9 alphanumenia sharestore							
	Field Type:         Address code         Max 8 alphanumeric characters							
Supplemental	Defaults from the admin portion of the requisition.							
Address	Enter any additional information in this field (i.e. I adding Dark Duilding							
	Enter any additional information in this field (i.e. Loading Dock, Building							
	Number, Room Number).							
	Field Type: May 40 alphanumeric characters							
	Field Type: Max 40 alphanumeric characters							

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

Admin Funding Addresses Sources Surcharge
- Suggested Sources
Enter the Vendor ID for a suggested source, if available.
Suggested Vendor:
Enter a valid contract number from which the items may be ordered, if applicable.
Contract Number:
Delivery Order:
OK Cancel <u>A</u> pply <u>H</u> elp

Figure 19 – Purchase Request Sources Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the  $\langle TAB \rangle$  key to move from field to field.

Field Name	Field Description						
Suggested Vendor	Defaults from the admin portion of the requisition.						
	If the items being procured on the requisition come from a known source, then enter the vendor ID. <b>Field Type:</b> 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. <b>Note:</b> The Contract Number can either be entered at the Requisition or Purchase Request level, within the Admin portion of the procurement.						
Delivery Order	<ul> <li>Field Type: Max 40 alphanumeric characters</li> <li>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.</li> </ul>						
	Field Type: Max 30 alphanumeric characters						

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

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

Purchase Request
Admin Funding Addresses Sources Surcharge
Surcharge Info
Surcharge Rate: 20.50 %
Revenue Account: 000000000000000000000000000000000000
OK Cancel Apply Help

Figure 20 – Purchase Request Surcharge Screen

Enter pertinent information in the following corresponding fields.

Be sure to use the $\langle TAB \rangle$ 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."					
	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.					
	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).

PR NIST-00-1005	_ 🗆 ×
<u>File Tools Options Gateways Forms Financial</u>	199
19 🖨 🖥 🕲 😕 😹	
Administration	
Purchase For: Bannister Complex Delivery Date: 12/30/2000 FSC: none Point of Contact: Cheryl Brace FOC Phone: 816 926-7025	
Account Summary Number Codes: 2 Total Amount: \$5,000.00	
Total Number: 1 Total Amount: \$5,000.00	
Bouting	
No routing information.	
Notes	
No procurement notes.	

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.

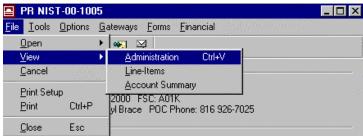


Figure 22 – Purchase Request Summary Screen - View options

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

Purchase Request	
Admin Funding Addresses Sou	rces Surcharge
Purchase Type	
© PR	
C Credit Card Card No: To	Be Assigned 💌
Name:	
Administrative Data	
Request Date: 02/25/2000	PR Form:
Requesting Office:	Project ID:
Point of Contact: Cheryl Brace	Dept:
POC Phone: 816 926-702	5
Properties	
Delivery Date: 12/30/2000	FSC: A01K 🔍 Priority: 99
Purpose: Need an add	itional office room to be built.
	Cancel <u>A</u> pply <u>H</u> elp

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).

<b>6</b> 6	ĂĂ▼▼ M						
ine Ite	m Total: 155,000.00		(	Option Total:	0.00		
No.	Description	Quantity		Cost	Туре	Status	
0001		10.00		500.00		Open-Assign	
0002	Description Text	300.00	EA	500.00	BPRI	Open-Assign	
							_
							_
							_
							-
							-
							-
							1

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).

File	quest Line Item Management				
- 66	▲ <b>▼</b> ¥ #				
Line	v Detail 155,000.00		Option Total: 0	1.00	
No.	Description	Quantity UI	Cost	Type Status	
0001		10.00 EA	500.00	BPRI Open-Assign	
0002	Description Text	300.00 EA	500.00	BPRI Open-Assign	
0002	Description Lext	300.00 EA	500.00	BPRI Upen-Assign	_

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

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

	quest Line Ite				×
	ounting Deliver	y Additio	onal Info		-
ltem Detai					
Item No. 0001	Quantity 10.00	UI EA	Unit Cost 500.00	Total Cost 5,000.00	
	FSC: none	9			
Stock Iten	n No.:				9
		O Head	er 💿 Description		
					<u>^</u>
					-
1					
		ок	Cancel	Apply	<u>H</u> elp

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).

Account Summary Management			_ 🗆 ×			
Eile						
🗅 😅 🛍 🗙 🚭 🛋 🔺 🛨 🚧						
Account Code Total: 5,000.00 Total Option: 0.00						
Default Accounting & Appropriation	# LI	Total Amount	Option Amount 🔺			
50.00 P37348638192×P064000151252K1516 NM092001	1	2,500.00	0.00			
50.00 P48010748192×P064000151252K1516NKS92001	1	2,500.00	0.00			
Defaults Total: 100%			<u> </u>			
1			<b>*</b>			
Enter data or press ESC to end.			///			

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).

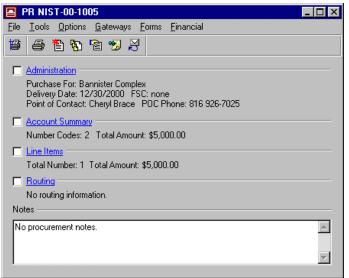


Figure 28 - Purchase Request Summary Screen

## **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).

ne Iter	m Total: 5,000.00		Option Total: 0.	00
0.	Description	Quantity UI		Type Status
001		10.00 E4	A 500.00 E	3PRI Open-Assign

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).

Purchase Request Line Item	X
Detail Accounting Delivery Additional Info	
Item No. Quantity UI Unit Cost Total	Cost
0002 0.00 EA 0.00 0.00	000
FSC: none	
Stock Item No.:	<u> </u>
C Header 💿 Description	
	<u> </u>
<u> </u>	<u> </u>
OK Cancel <u>Appl</u>	y <u>H</u> elp

Figure 30 – Purchase Request Line Item Detail Screen.

Be sure to press the  $\langle TAB \rangle$  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	Line Items that were added from the requisition level will display within the			
Number	PR Line Item Management Browser.			
	Otherwise, users may enter 0001, 0002, 0003 etc for CLINS or you may enter 0001AA 0001AB, 0001AC if this item is a SUB-CLIN.			
	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.			
	Otherwise, enter the quantity required for this item.			
	<b>Field Type:</b> 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.
	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.
	<i>Note:</i> Once the unit cost is entered, press the <i>&lt;</i> TAB <i>&gt;</i> key will automatically calculate the total cost of the line item. <b>Field Type:</b> Decimal ->>>>9.99999
FSC	The FSC code defaults from the Administrative portion of the requisition.
	Field Type: Max 4 alphanumeric characters
Stock Item Number	Defaults from the line item at the requisition level.
Number	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.
	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.
	Header text is used for text users would like to have print with the line items
	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.
	Field Type: 300 alphanumeric characters
Description Text	Field Type: 300 alphanumeric charactersLine Items that were added from the requisition level will display within the
	PR Line Item Management Browser.
	When the Description radio button is selected, enter the line item description
	for the supplies or services being procured.
	Field Type: 300 alphanumeric characters
	The super soo approximent characters

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

urchas	e Request Line	ltem			×
Detail	Accounting De	ivery Additi	onal Info		
Lin	ounting & Appropri e Item Cost: 150,0 count Lines:			Fund Code:	
Co	st	Pct BOI	C Account	Code	<b>^</b>
	75,000.00	50.00	P480107	48192×P0640001	51252K
	75,000.00	50.00	P373486	38192×P0640001	51252K
					-
•					
Tota	al Cost: 150,000.0	D	Total Percent:	100.00 %	
E Char	nge Account Line				
	Cursor Positi	on		New [	)elete
Acc	ount: P48010748	192×P06400	0151252K1516N	KS92001 KS	500 Q
	BOC:				
Per	cent: 50.00	Cost: 75,000	000000	O Cost G	Percent
		OK	Cancel	Apply	<u>H</u> elp

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.					
	ield Type: Max 100 alphanumeric characters					
BOC	Defaults from the Line Item portion of the requisition, if entered.					
	Field Type: 6 alphanumeric characters					
<b>Cost/Percent</b>	Defaults from the Line Item portion of the requisition.					
	Select either the Cost or Percent radio option.					
	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).

Grou	.p	#	Account Number	4
C00	NRD	1	P48010748192XP064000151252K1516NKS92001	
CRS	S	1	P00441575192XP064000151252Y1516NM092001	
CYG	NA	1	P08156273192XP064000151252Y1516NM093001	
DUN	N	1	P37349242192XP064000151252K1516NM093001	
GS-	06P	2	PXXXXXXX192XP06252055425NL1516RIA34608N9034608	
KAR	EN	1	P9876544192Xkaren	
MDI	-2	1	P37348638192XP064000151252K1516 NM092001	-
•			Þ	
			List Accounts Matching:	

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).

Purchase Request	Line Item					х
Detail Accounting	Delivery A	dditional	Info ]			
Accounting & App Line Item Cost:				Fund Code	e: 🚺	
Account Lines:	Cost Pct BOC Account Code					
	00.00 50.00			48192×P064000	151252K	
	00.00 50.00		P3734863	38192×P064000	151252K	
					▼ ▶	
Total Cost: 150,0	00.00	T	otal Percent:	100.00 %		
Change Account	Line					4
Cursor	Position			New	Delete	
Account: P4801	0748192×P06	4000151	252K1516Nk	<s92001 k<="" td=""><td>(SOO 🔍</td><td></td></s92001>	(SOO 🔍	
BOC:					•	4
Percent: 50.00	Cost: 75	,000.000	000	C Cost (	Percent	
	OK		Cancel	Apply	<u>H</u> elp	

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).

BOC:		•
Elauna 24	DOC dram daying	

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).

Percent: 100.00	Cost: 5,000.000000	🔿 Cost 💿 Percent			
Figure 35 – Percent radio option					
Percent: 100.00	Cost: 5,000.000000	Cost O Percent			
Figure 36 – Cost re	adio option				

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

Purchase Request Li	ne Item			×
Detail Accounting	elivery Additio	nal Info		
Shipping Information	ı			
Delivery Date: 12	/30/2000	FOB Designation:	_	
Deliver To: 112	ZSPRI	<u>a</u>	<ul> <li>Destination</li> <li>See Sche</li> </ul>	
Address Display:				
COX MEDICAL CI 1423 N. JEFFERS				
NCIGFIELD	MO 65802			
			Priority:	99
Supplemental Add	ess:			
	ок	Cancel <u>A</u>	pply	<u>H</u> elp

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.
	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.
	Field Type: Date field MM/DD/YYYY
<b>Deliver</b> To	Defaults from the Line Item portion of the requisition.
	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	Defaults from the Line Item portion of the requisition.					
Designation						
	Each line item may have the same or different FOB destination. Users					
	may specify different FOB for each line item.					
	Field Type: 1 character					
	Origin=O Destination=D See Schedule=S					
Priority	Defaults from the Line Item portion of the requisition.					
	Field Type: Integer 99					
Supplemental	Defaults from the Line Item portion of the requisition.					
Address						
	Each line item may have the same or a different supplemental address.					
	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).

Purchase Request Line Item		×
Detail Accounting Delivery Pricing Options INt Separately Priced Option Year	Additional Info	
Additional Information		
0	Cancel Apply	Help

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	Defaults from the Line Item portion of the requisition. Otherwise, check				
Priced	the box if this item is Not Separately Priced.				
	Field Type: Logical field (Yes/No)				
<b>Option Year</b>	Defaults from the Line Item portion of the requisition. Otherwise, check				
	the box to designate this item as an Option Year.				
	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.				
	Field Type: 1 character				
Prior Year	Quantity=QUnit Cost=UBoth=BDefaults from the Line Item portion of the requisition.				
	Defaults from the Line ferm portion of the requisition.				
	Otherwise, check if obligating funds is other than the current year.				
	<i>Note: This field is used when transactions are sent through financial</i>				
	interfaces. Checking this field tells the financial interface that the				
	bligation or deobligation transaction is for funds from a prior fiscal				
	year, not the current fiscal year.				
	Field Type: Logical field (Yes/No)				
Include in	Defaults from the Line Item portion of the requisition.				
Surcharge	Otherwise a surplement percentage rate may be entered on the DD. This				
	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."				
	Field Type: This field is a Check Box				
Project ID	Defaults from the Line Item portion of the requisition.				
	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).

ine Iter	n Total: 155,000.00						
lo.	Description	Quantity	UI	Cost	Туре	Status	
001		10.00		500.00		Open-Assign	
1002	Description Text	300.00	EA	500.00	BPRI	Open-Assign	
							- 1
							- 1
							- 8
							- 8
							18

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*).

PR NIST-00-1005	_ 🗆 🗵
<u>File T</u> ools <u>O</u> ptions <u>G</u> ateways <u>F</u> orms <u>F</u> inancial	
督 🖨 陷 🔁 🍤 🔗	
Administration	
Purchase For: Bannister Complex Delivery Date: 12/30/2000 FSC: none Point of Contact: Cheryl Brace POC Phone: 816 926-7025	
Account Summary Number Codes: 2 Total Amount: \$155,000.00	
Total Number: 2 Total Amount: \$155,000.00	
E Routing	
No routing information.	
Notes	
No procurement notes.	A

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).

PR NIST-00-1005	- 🗆 ×			
<u>File T</u> ools <u>Options G</u> ateways <u>F</u> orms <u>F</u> inancial				
19 🔿 🎦 🚯 🖀 🍤 🔗				
Administration Support Docs				
Purchase For: Bannister Complex Delivery Date: 12/30/2000 FSC: A01K Point of Contact: Cheryl Brace - POC Phone: 816-926-7025				
Account Summary Number Codes: 2 Total Amount: \$155,000.00				
Total Number: 2 Total Amount: \$155,000.00				
Pending Reviewers: 2 Current Reviewer: Lisa Kleback since 03/	02/2000			
Notes				
No procurement notes.	×			

Figure 41 - Purchase Request Summary Screen - Support Docs

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

S 🖻	uppa	rting	Doc	umenta	ation						_	⊐ ×
<u>F</u> ile	<u>T</u> ool										 	
Ľ	<b>2</b>	œ	$\mathbf{X}$	9	▲ .	• •	Ŧ	<b>#</b>	2			
Doc'	Туре	Da	ite	Time	SOW	Marked	Full P	ath				-
-										 	 	
		_										_ ]
		-										
		_										
											 	7
Ente	er data	a or pr	ess ES	SC to er	nd.							_//_

Figure 42 - Supporting Documentation Browser

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

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

Supporting Documentation	×
Location Details	
File:	Browse
Save file content into database	
	Templates
Comments:	
	<u></u>
	7
OK Cancel	<u>H</u> elp

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.
	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.
	Users can make editing changes to the document and resave the
	file.
Template	Templates within CSTARS.
Save file contents into	When checked, allows the supporting document to be saved to the
database (checkbox)	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.
	Field Type: This field is a Check Box
Comments	This is an optional field.
	This field may be used to insert special notations/comments to be
	routed with this procurement action to a reviewer.
	Field Type: Text field

From the *Location Tab Screen*, click the *Browse* button to locate the filename from both local and network drives.

Select One File for Supporting Document	? ×
Look jn: 🔄 temp 💌	
🖻 Dbi01693	🕙 Hotline Report Cover
🕙 doc update.doc	🖻 lbi00057
📲 doc_status.xls	🛋 lbi01693
🖭 eral1.doc	🛋 llk.tb
🚰 expense1.doc	🚰 Mods3.doc
🚰 GSATeam.doc	🛋 sa1.tb
	Ŀ
File <u>n</u> ame:	<u>O</u> pen
Files of type: All Files(*.*)	▼ Cancel

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).

File:	
C:\temp\doc update.doc	<u>B</u> rowse

Figure 45 - Location Tab Screen - Filename

To launch the filename, click the *Launch* <u>Launch</u> 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).

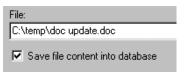


Figure 46 - Location Tab Screen - Checkbox option

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

Supporting Documentation
Location Details
Attachment For:
Attachment From: Purchase Request
Attached On: 03/03/2000
Attachment Type:
This document is the Statement of Work (SDW).
For 'Web Publish' with the Solicitation/Amendment.
OK Cancel Help

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.
	Otherwise, this field is used to indicate the contents of the supporting document (i.e. Statement of Work (SOW), Section D, etc.)
	Field Type: Max. of 12 alphanumeric characters
SOW (checkbox)	Used to indicate a supporting document as the Statement of Work.
	<i>Note:</i> While you can have only one support document designated as the SOW, you can change the file at any time.
	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.
	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).
	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.
	Some documents may be for internal use only, others are actually a part of the solicitation and/or award package issued to the vendor.
	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).

Supporting Documentation			×
Location Details			
Attachment For:			
Attachment From: Purchase I	Request		
Attached On: 03/03/200	00		
Attachment Type: MS Word			
		atement of Work ( ne Solicitation/Am	
	ОК	Cancel	<u>H</u> elp

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).

Supporting Documentation
Location Details
Attachment For:
Attachment From: Purchase Request
Attached On: 03/03/2000
Attachment Type: MS Word
<ul> <li>This document is the Statement of Work (SDW).</li> <li>For 'Web Publish' with the Solicitation/Amendment.</li> </ul>
OK Cancel <u>H</u> elp

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).

Supporting Documentation	×
Location Details	
Attachment For: Attachment From: Purchase Request Attached On: 03/03/2000	
Attachment Type: MS Word  This document is the Statement of Work (SOW).  For 'Web Publish' with the Solicitation/Amendment.	
OK Cancel <u>H</u> elp	

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).

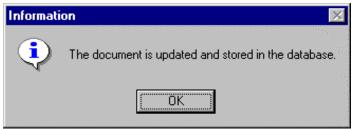


Figure 51 - Information Message

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.

🗅 😅 🤅	<u>۲</u> 1	9		▲ ▼	<b>•</b> #	2		
)oc Type	Date				Full Path			
IS Word	03/03/00	10:16	yes	no	Document	stored	in database	
								-
								_
								 -
								-

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).

		<b>×</b> •			🖳 🤧	•	
rder Add	ress To			Since	At	Status	
					_		
			_				

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).

R	oute List					1 ×
<u>F</u> ile	<u>Tools</u> <u>Options</u>					
D	<u>M</u> odel	<b>X A V</b>	Y 🗛 📱	h 🤧		
Ordei	<u>R</u> elease	1	Since	At	Status	

Figure 54 - Route List Browser

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

Code Type - Model Name	
- HENRY	<b></b>
– ннннн	
- KEITHSMODEL	
- SANDI	
49'S - RUTH'S LIST	
495 - TONYA	
BRA PURCHASES >= 5	
000 - REQUISITION	
REQ'S FOR CHNGS - HRUSKA	
SA1 REQUISITION - CLASSROUTE	
SA1 REQUISITION - GEORGE	
HIR REQUISITION - JEAN	
ROU REQUISITION - REQUISITION	I-DAVE
MAN REQUISTION - CROCKER	
ROUTE 49'S - 6PMT-W	
ROUTE 495 - SYSTEMS	
ROUTE STL 495 - STL	•

Figure 55 - Route List Model Screen

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

Re	bute List	×
Π	Reviewer	
	Reviewer's code: 🔣	
	Reviewer: Lisa Kleback	
	Title: Trainer/Funactional	
	Order for receiving document: 10	
	Priority of document being routed: 🔟	
	Approval Required O Carbon Copy	
	OK Cancel <u>Apply</u> <u>H</u> elp	

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).

Reviewer				
Rev	viewer's code: b			
	Reviewer: (	Cheryl Brace		
	Title:			
Order for receivi	ng document: 🛛	20		
Priority of document	being routed:	0		
		Approval Requ	ired C Carbon	Сору
	01/			
	OK	Cancel	Apply	<u>H</u> elp

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).

□ 🛩 🗙 🖨 革 🔺				
Irder Address To	Since	At S	Status	
10 Lisa Kleback	A			_ +
20 Cheryl Brace	A			
				_
				- 0
				-
				-
				-
				- 8
				-
				- 1
				- 1
				-
essage:				-

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).

🗅 🧀 🗙 🎒 🛋 🔺	-	Since	At	Status	
10 Lisa Kleback	Δ	02/25/2000			
20 Cheryl Brace	A		TH. OLOIN	in one in on any	
essage:		·			

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).

PR NIST-00-1005	⊐ ×
<u>File T</u> ools <u>O</u> ptions <u>G</u> ateways <u>F</u> orms <u>F</u> inancial	1
🍯 🎒 🖏 🗃 🤧 🗧	
Administration	//
Purchase For: Bannister Complex Delivery Date: 12/30/2000 - FSC: none Point of Contact: Cheryl Brace - POC Phone: 816-926-7025	
Account Summary	
Number Codes: 2 Total Amount: \$155,000.00	
☐ Line Items Total Number: 2 Total Amount: \$155,000.00	
Routing	
Pending Reviewers: 2 Current Reviewer: Lisa Kleback since 03/02/2000	
Notes	
No procurement notes.	4

Figure 60 - Purchase Request Summary Screen