Commerce Business Systems (CBS)

Achieving Excellence in Financial Management

NOAA

C.Request

Exercises

for

FY 2021 Training

Version 1.0.1

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Changes/Revisions Record

This is a living document that is changed as required to reflect system, operational, or organizational changes. Modifications made to this document are recorded in the Changes/Revisions Record below. This record shall be maintained throughout the life of the document.

Version Number	Date	Description of Change/Revision	Changes Made by Name/Title/ Organization
V1.0.1	4/9/2021	Updated Office Code Link to correct link	E.Cobbs/FSD CSB - Training
V1.0	10/01/2020	New FY 2021 Training Exercises – updated for current FY	E.Cobbs/FSD CSB – Training

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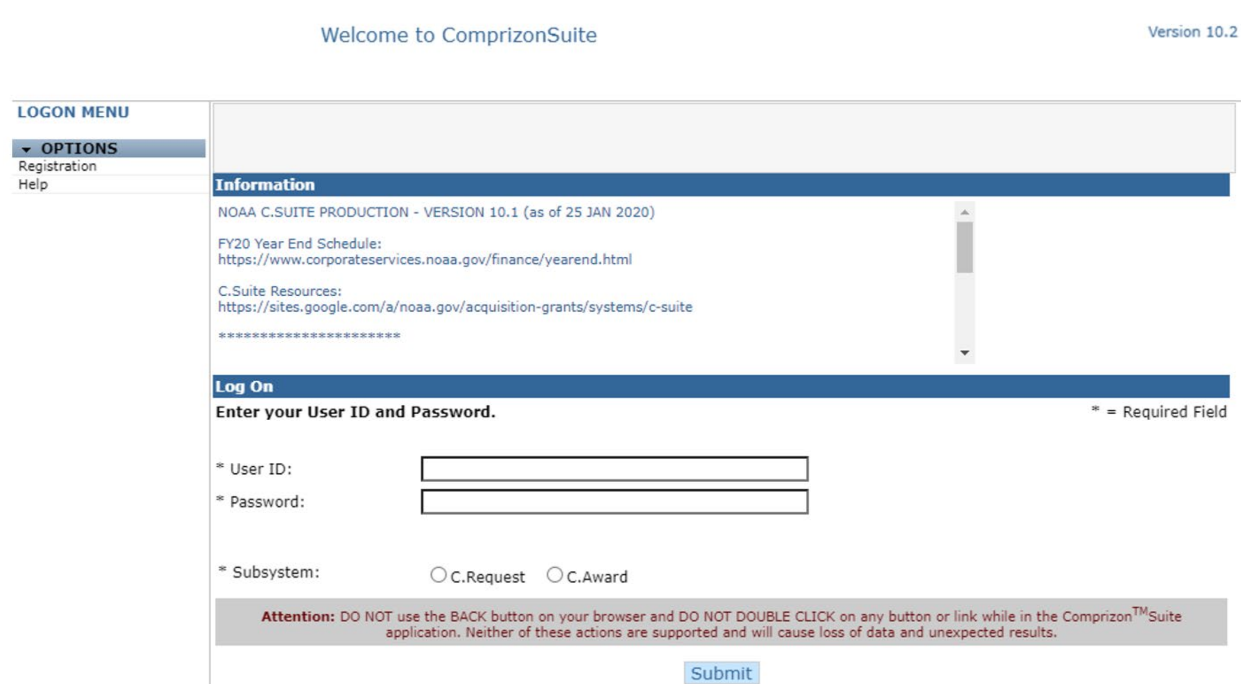
Exercise #1: Login to C.Request

Objectives:

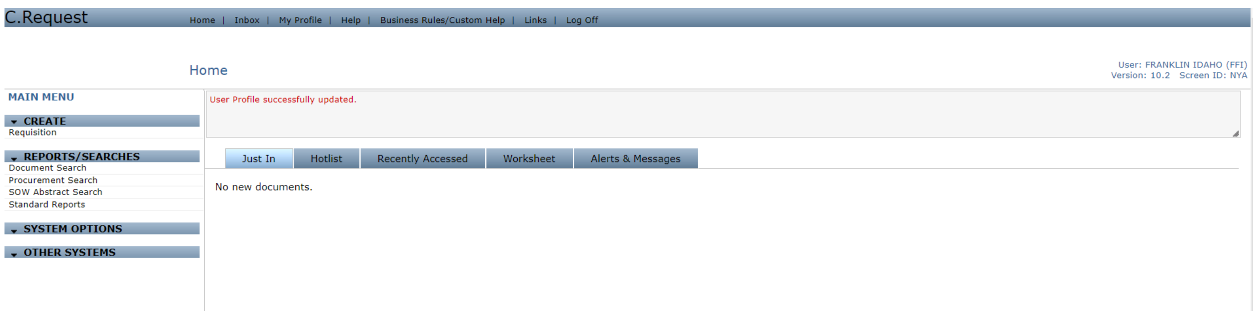
- Successfully Login to C.Request
- Access C.Request Home Page
- Understand the Navigation Terms

Instructions: Execute the following steps:

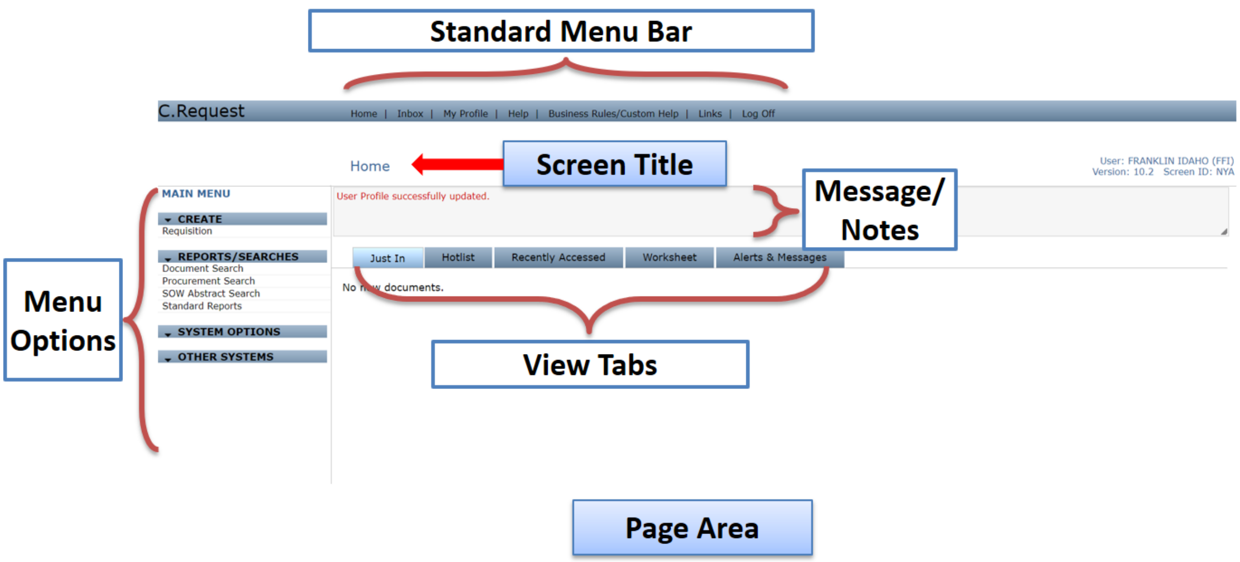
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>➢ Open up a web browser (Internet Explorer or Google Chrome)
➢ Go to the C.Suite URL</td></tr>
<tr><td>2</td><td>On the Login Screen:
➢ Enter your username.
➢ Enter temporary password
➢ Select the Subsystem
➢ Click Submit



</td></tr>
</table>

Step	Action
3	The **Home** screen appears. 

Navigation Terms



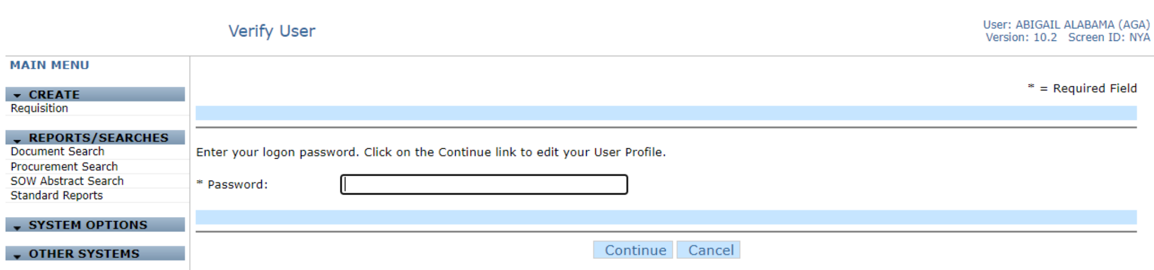
Exercise #2: My Profile

Objectives:

- Navigate to my profile
- Add your email address
- Change your password
- Change your signature PIN
- Add Personal Account Codes

Instructions: Execute the following steps:

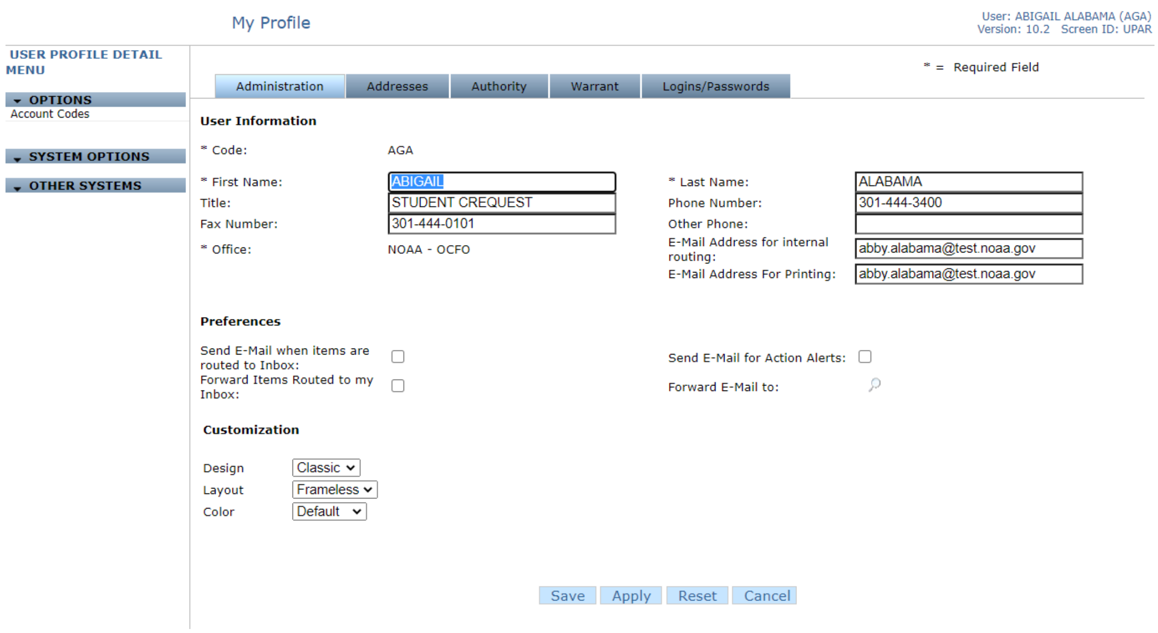
You have just received access to C.Request. The first time you log into the system you will need to update some fields on My Profile. Navigate to My Profile – add your email address, change your default password and default signature PIN and add Personal Account Codes.

Step	Action
1	From the **Home** screen: ➢ Click the ***My Profile*** menu option on the *Standard Menu Bar*
2	The **Verify User** screen appears. ➢ Enter your *login password* ➢ Click ***Continue*** 

Step | **Action**

3

The **My Profile** screen appears.



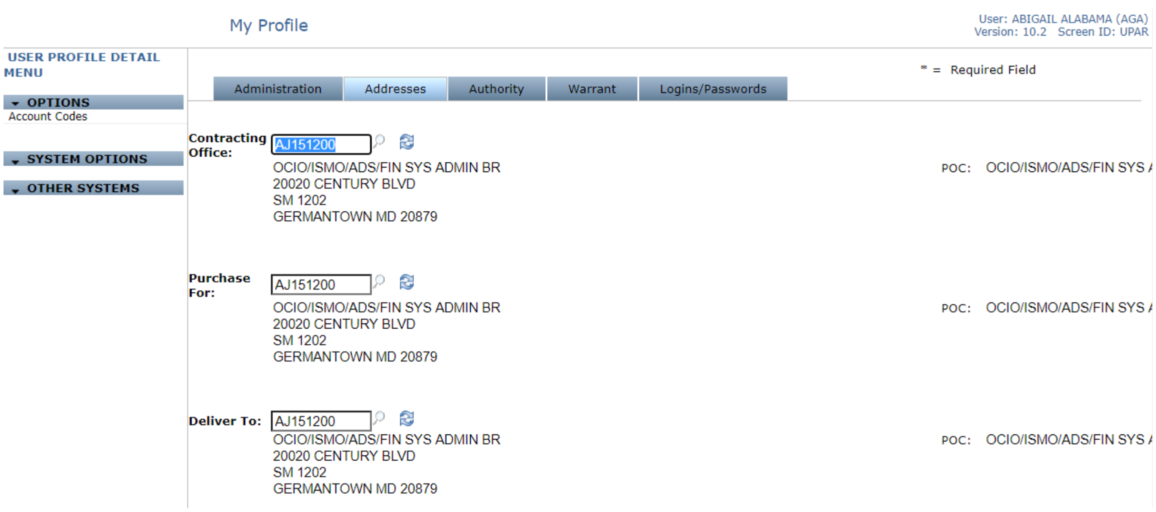
Under the *Administration* view tab:

- Verify Information entered is correct
- Click the *Addresses* view tab

Notes:

- ✓ *In production, you will verify the information in these fields is correct. These fields are populated by the information provided by you when you signed up for access to C.Request.*
- ✓ *In the preferences section, a general requisitioner will only check the box for action items. Once checked, C.Suite will send you emails when actions either need to be taken or have been taken (i.e. to whom it was sent to for approval, final approval, rejected or accepted by CFS, etc.)*
- ✓ *A reviewing or approving official will want to check the box to receive and email when items are sent to their inbox.*
- ✓ *There is also a section that allows you to customize the way C.Request displays on screen.*

Step	Action
4	Under the *Addresses* view tab: ➢ Verify that the first three address fields are filled out ➢ Click the *Logins/Passwords* view tab

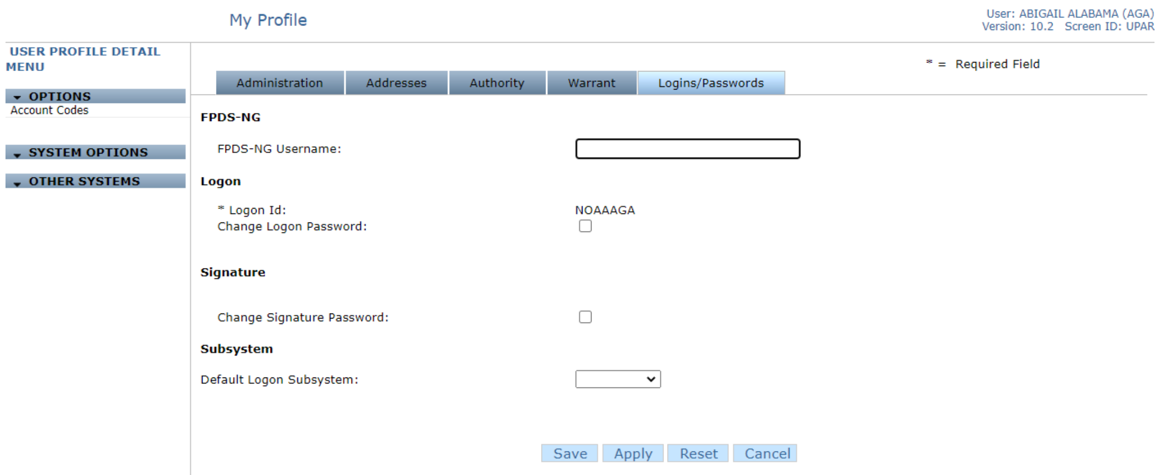


Notes:

✓ *When first logging into this screen, these fields will be blank.*

✓ *In production, you will want to enter all of your addresses here in order for them to automatically populate on each requisition. This will save you a great deal of time when processing requests in future.*

✓ *You can change any populated address on a requisition to a different one.*

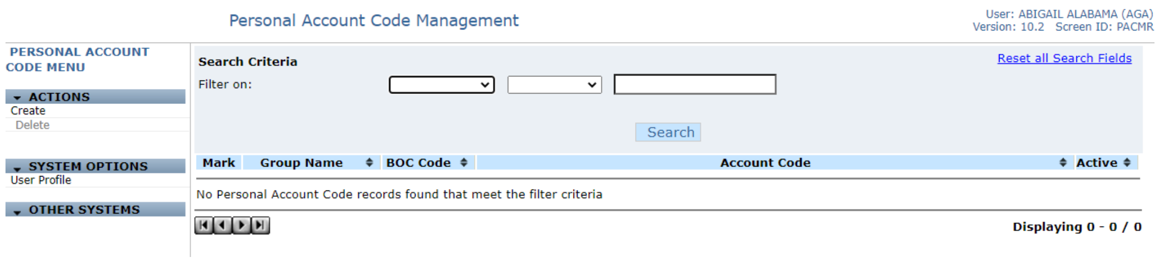
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>
Under the Logins/Passwords view tab:
➢ Check the box Change Logon Password
➢ Check the box Change Signature Password
➢ Enter & Confirm the New Password
➢ Enter & Confirm the New Signature PIN
➢ Click Apply


</td></tr>
<tr><td></td><td>
Notes:
✓ In production the FPDS-NG Username field will be filled in with your email.
✓ Clicking Apply saves the information and keeps you on the same screen.
✓ Clicking Save saves the information and closes the screen.
</td></tr>
<tr><td>6</td><td>
Once you have clicked Apply, you will see the following option in the menu at the left.
Click Account Codes under the Menu Options.


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

The **Personal Account Code Management** screen appears.



➢ Click the ***Create*** menu option

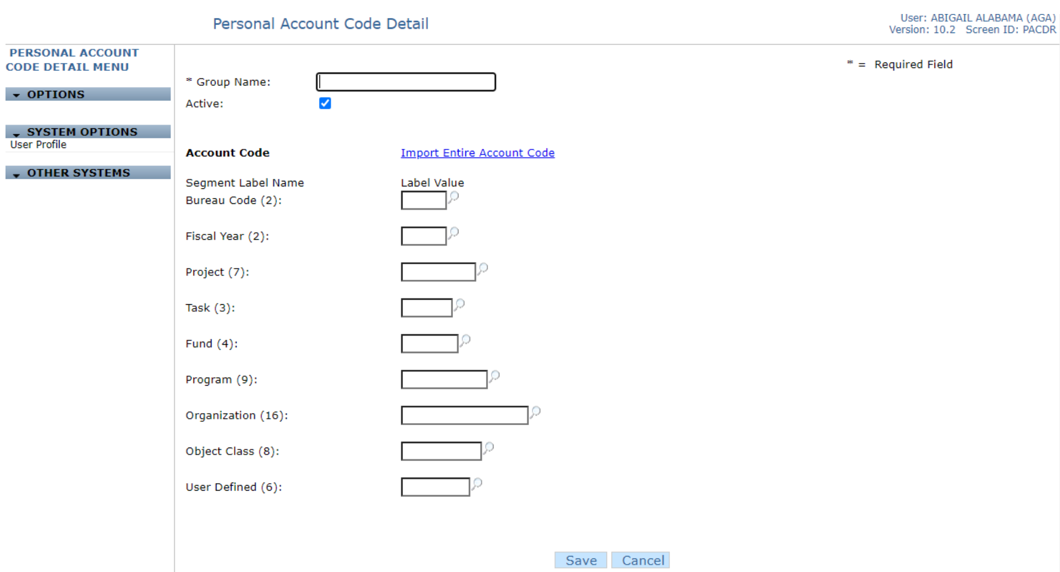
</td></tr>
<tr><td></td><td>

Notes:

✓ *This feature allows you to add accounting codes to your profile so that you can more easily add them to your requisitions.*

</td></tr>
<tr><td>8</td><td>

The **Personal Account Code Detail** screen appears.



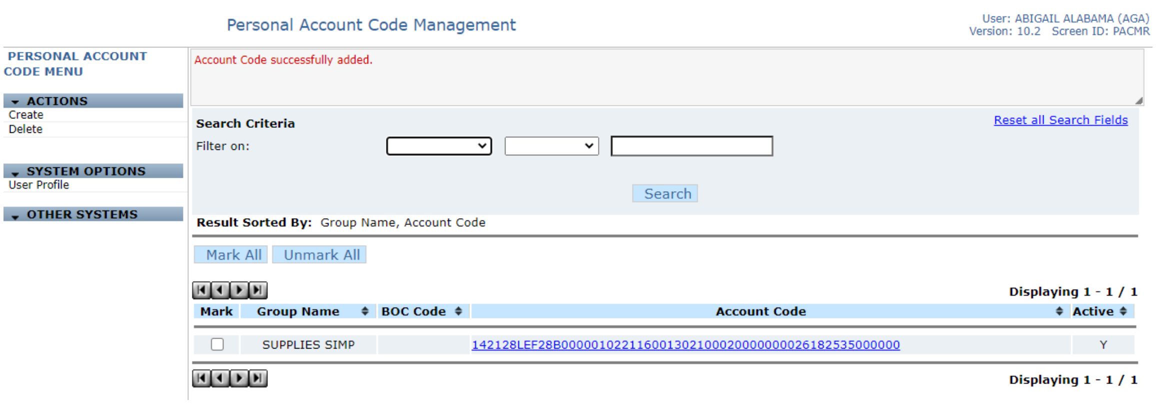
➢ Enter the name you wish to give this ACCS in the *Group Name* field (i.e. **Supplies Simp**)

➢ Enter all values of the ACCS (e.g., bureau, fund, etc.)

➢ In this example, use the following ACCS string: *14-21-28LEF28-B00-0001-022116001-3021000200000000-26182535-000000*

➢ Click ***Save***

</td></tr>
</table>

Step	Action
	Notes: ✓ *Each field name has a number in parentheses; this represents the number of characters that the field must contain* ✓ *Enter all field values in capital letters* ✓ *For any fields that end in zero, you can hold down on the zero on your keyboard; C.Request knows when to stop* ✓ *You can also leave some fields blank (like object class) so that you have a default template ACCS. This is useful if you often use ACCS codes that have most of the same information, but may have different Object Class entries.* ✓ *AGO Fee for Service (FFS) now means your ACCS must have either 2517 or 2535 at the end of your object class code* ✓ *Pro-Tech object classes will end in 2603* ✓ *NOAALink object classes will end in 0011*
9	You'll be returned to the **Personal Account Code Management** screen, where your new ACCS will appear and you'll see a message at the bottom stating it has been successfully added.  ➢ Using the above steps add the following ACCS string for **Supplies Non-Simp**: *14-21-28LEF29-P00-0001-022116001-3031000200000000-26182517-000000* ➢ Click the ***Home*** link in the *Standard Menu Bar* when finished
10	The **Home** screen appears.

Exercise #3: Create a Requisition (Paper)

Objectives:

- Navigate through C.Request
- Create a Requisition
- Follow flow chart

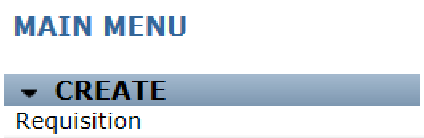
Instructions: Execute the following steps:

Your office is close to running out of copier/fax paper. You need to create a requisition after getting a quote for 10 boxes that would contain 10 reams per box. The quote you got from Staples was $6.59 per ream for 70+ reams.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>

From the **Home** screen:

➢ Click ***Create Requisition*** from the *Menu Options*



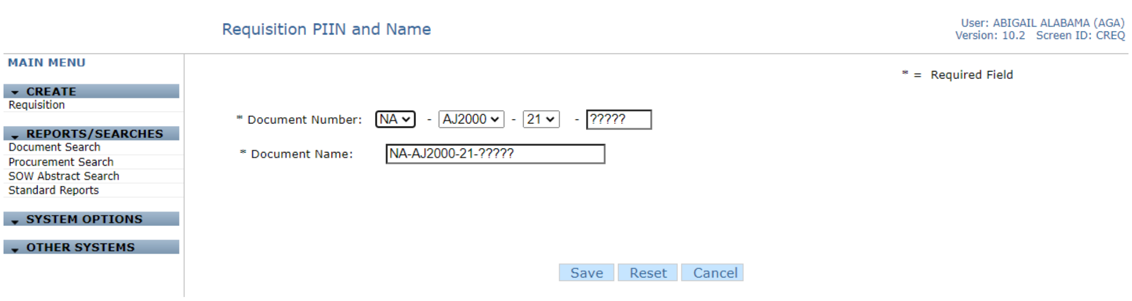
</td></tr>
<tr><td>2</td><td>

The **Requisition PIIN and Name** screen appears.

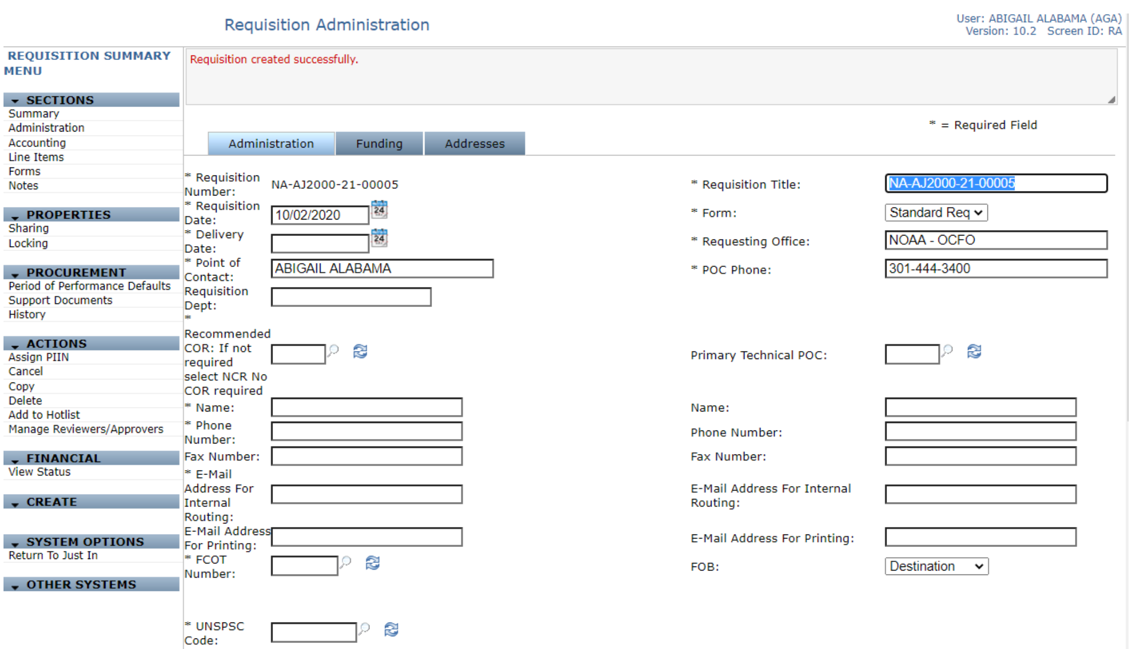
➢ Choose ***Document Number*** from the *PICKLIST*

➢ Change the ***Document Name*** if you wish. (i.e. [date] PAPER)

➢ Click ***Save***



</td></tr>
</table>

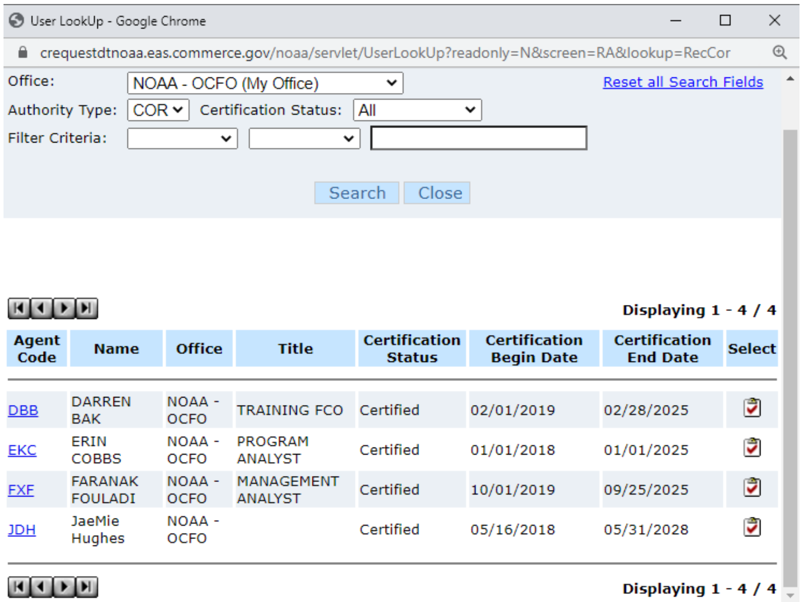
Step	Action
	Notes: ✓ *The user's codes for their office will show in the first Document Number field.* ✓ *The document number is made up of the Bureau Code, Office Code, Fiscal Year and a system generated number.* ✓ *The Office Codes can be looked up here: [Google Sheet - Office Codes]* ✓ *A preparer may change the document name to something that is specific to them; however, there is approximately a 30 character limit. If the preparer does not want to change it, the system will default the name to the Document Number.* ✓ *If changing the Document Name you may want to add a date at the beginning of the name letting you know when this requisition was created.* ✓ *Any field containing an asterisk (*) is a mandatory field that needs to be entered.*
3	The **Requisition Administration** screen appears. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3a</td><td>On the Administration view tab:
The following fields should be automatically populated based on information in your Profile:
Requisition Number (system generated)
Requisition Title (although this can still be changed here)
Requisition Date (populates with the current system date)
Form (Should always read Standard Req)
Requesting Office (populated from My Profile and should be filled with your office)
Point of Contact (populated from My Profile and should be filled with your name)
POC Phone (populated from My Profile and should be filled with your number)</td></tr>
<tr><td>4</td><td>On the Administration view tab you will need to:
➢ Enter the Delivery Date (i.e. MM/DD/YYYY)
➢ Click the Lookup icon for the Recommended COR field</td></tr>
<tr><td></td><td>Notes:
✓ The Delivery Date should follow the PALT guidelines.
✓ The Delivery Date for certain items would be when you expect it to be delivered.
✓ The Delivery Date for items that have multiple option periods should reflect the end date of the last period.
✓ AGO has the ability to change the delivery date should it need to change due to PALT issues.</td></tr>
</table>

Step	Action

4a

A new window opens:

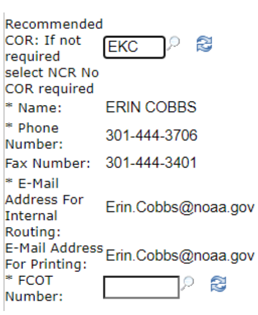


The pop-up window automatically has populated your Office and the Authority type of COR, which allows for a listing of all your CORs for your office. Prior to selecting one you must review their certification status and begin and end dates to make sure you've selected a valid one.

➢ Click the *Select* icon of the code you want to choose (i.e. EKC)

5

The selection will populate all the mandatory fields related for the COR on the screen:



➢ Click the ***Lookup*** icon for the ***FCOT Number***

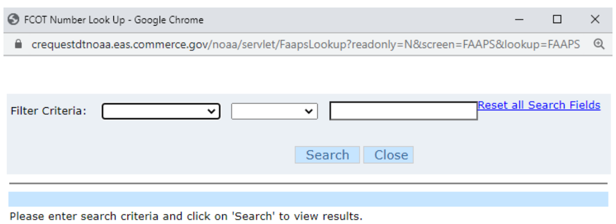
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Notes:

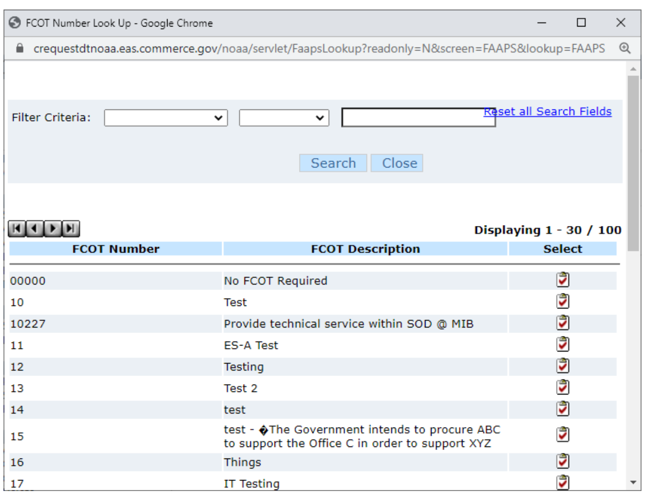
- ✓ *If you do not know who the Contracting Officer Representative (COR) is you can type in NCR in capital letters and click the refresh icon. The fields below will then populate with default system information.*
- ✓ *FCOT Number is replacing FAAPs and information containing that can be found here: https://sites.google.com/a/noaa.gov/acquisition-grants/systems/c-bot*

</td></tr>
<tr><td>5a</td><td>

A new window opens:



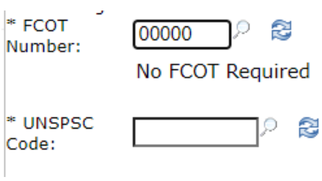
The filter criteria fields will be blank. Either use the drop-down arrows for each field to enter your criteria or click ***Search*** to bring back all FCOT numbers



Since this is a non-simplified purchase and isn't a service we can choose the option for No FCOT Required

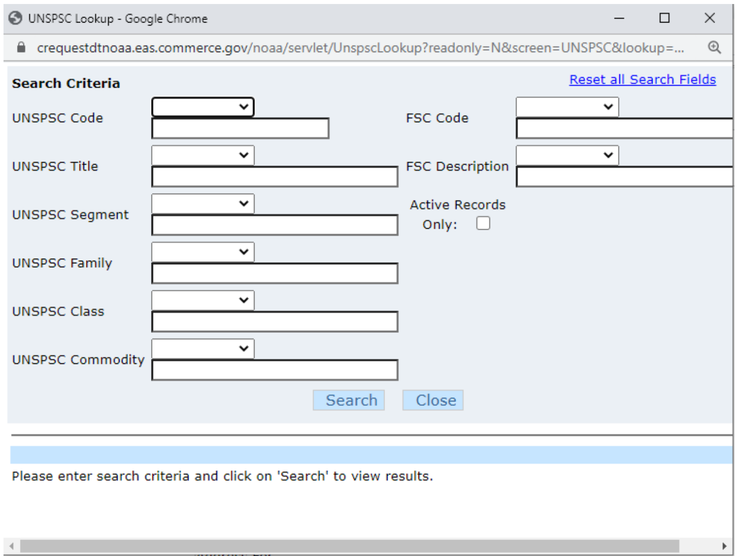
- ➢ Click the *Select* icon for the code (i.e. 00000)

</td></tr>
</table>

Step	Action
	Notes: ✓ *Any acquisition that is $250,000 or less might be considered a simplified acquisition and will use 5 zeroes in the FCOTs number field. Do not use more than 5!* ✓ *Any acquisition over $250,000 must have a specific FCOTs number.* ✓ *Primary Technical POC is not a required field.*
6	The selection will populate the FCOT field on the screen:  ➢ Click the ***Lookup*** icon for the ***UNSPSC Code***

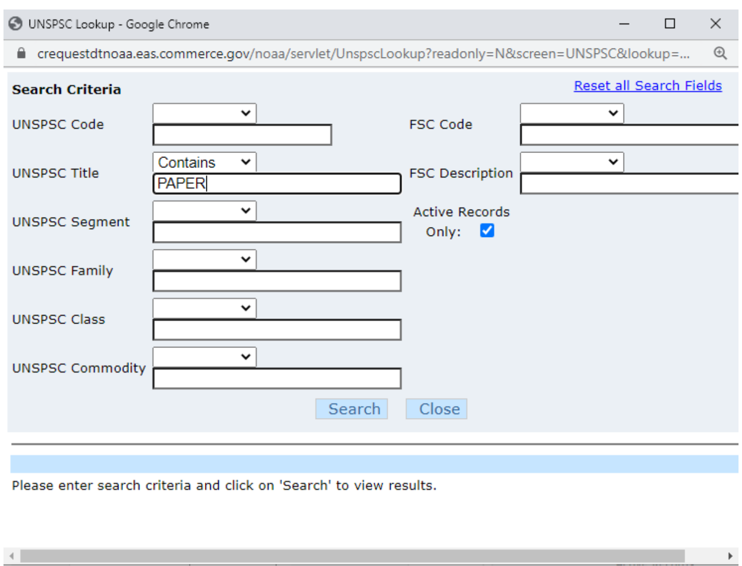
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6a</td><td>

A new window opens:



The filter criteria fields will be blank.

- Check *Active Records Only*
- Use the drop-down menus and enter the criteria you want to use to locate the UNSPSC code OR FSC Code



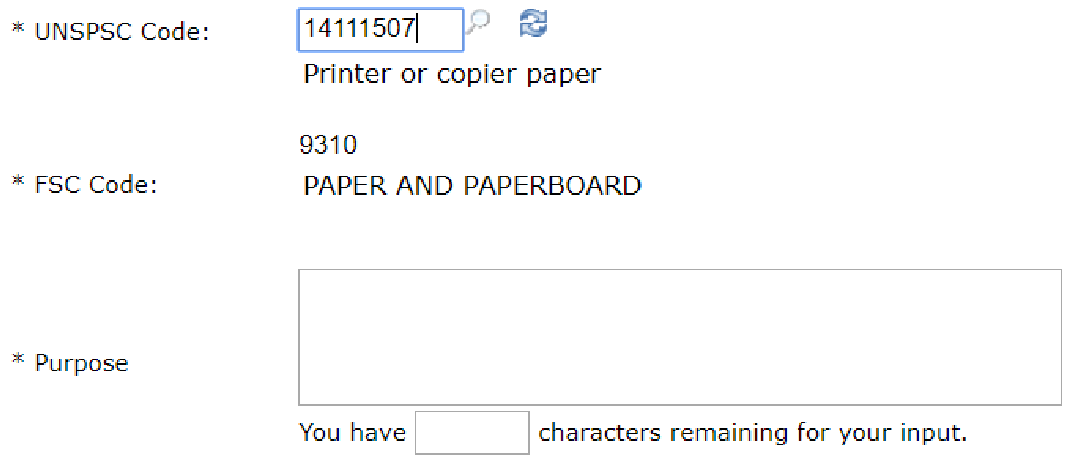
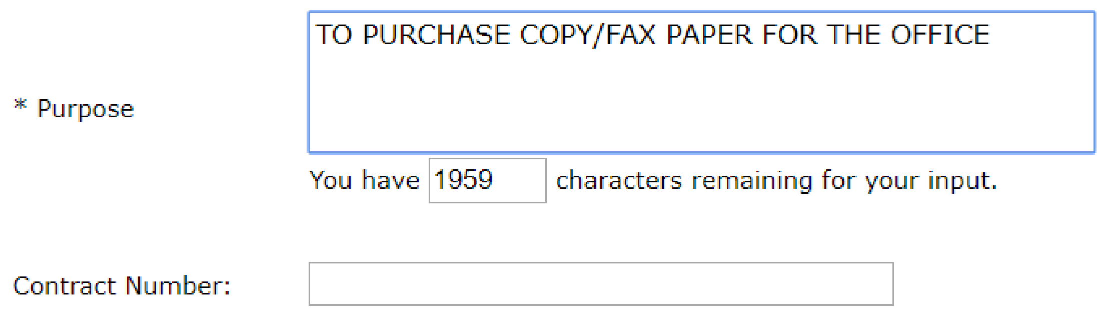
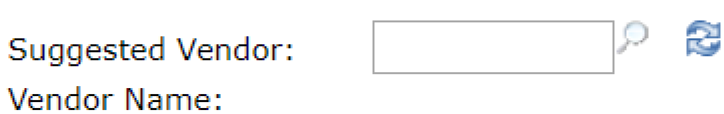
- Click ***Search*** to return all codes that match the criteria you are searching

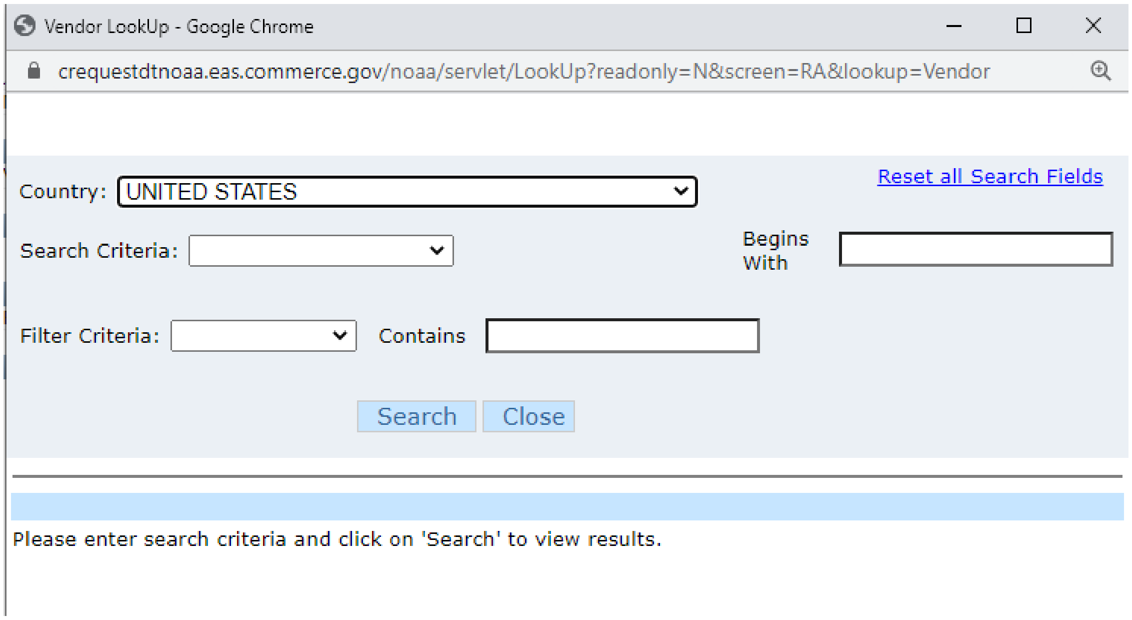
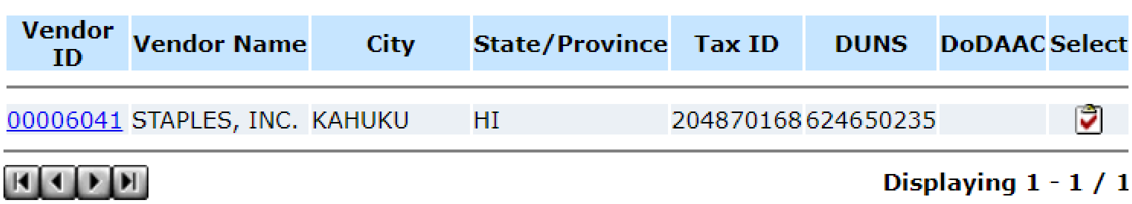
</td></tr>
</table>

Step	Action
	Notes: ✓ *This is a mandatory field. You are not able to enter the FSC code directly; however, when you select a UNSPSC code, the related FSC Code will populate automatically.* ✓ *If you are unable to find the code in the system, check the DOC website: https://community.max.gov/pages/viewpage.action?pageId=696617672* ✓ *You will have to register to download the list and the FSC crosswalk.* ✓ *If you find a UNSPSC code that you need on the list, fill out this form: UNSPSC Code Form and submit it so that it can be added to C.Request by the system administrators.*
6b	The screen will then display all codes matching what you're searching on:

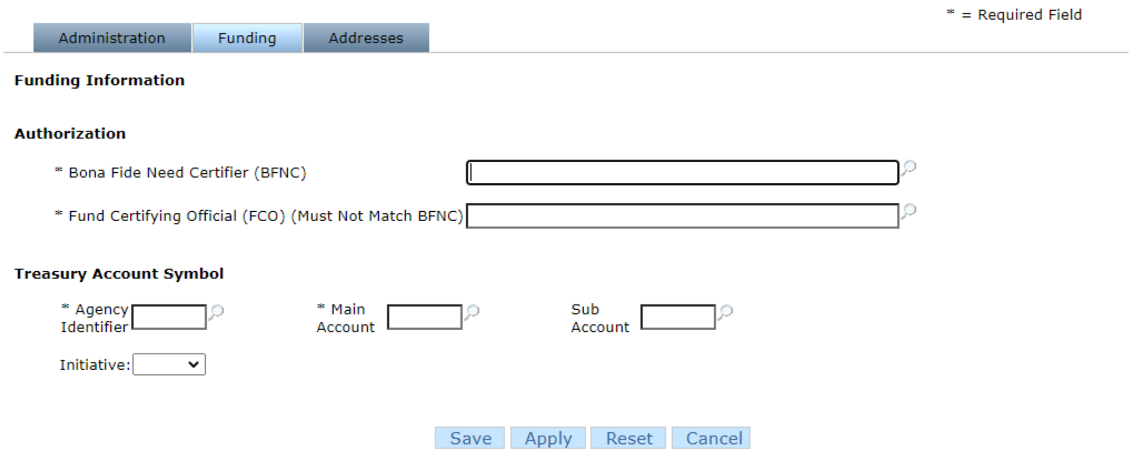
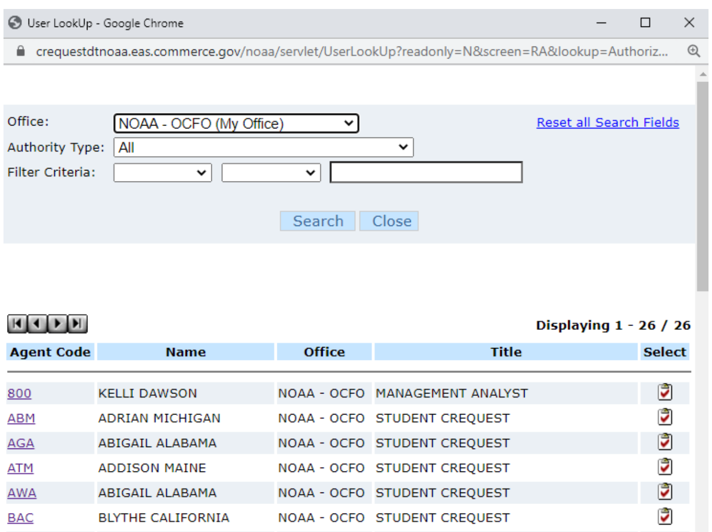
UNSPSC Code	UNSPSC Title	UNSPSC Segment	UNSPSC Family	UNSPSC Class	UNSPSC Commodity	FSC Code	FSC Description	Active	Select
14111500	Printing and writing paper	Paper Materials and Products	Paper products	Printing and writing paper		9310	PAPER AND PAPERBOARD	Y	
14111507	Printer or copier paper	Paper Materials and Products	Paper products	Printing and writing paper	Printer or copier paper	9310	PAPER AND PAPERBOARD	Y	
14111511	Writing paper	Paper Materials and Products	Paper products	Printing and writing paper	Writing paper	9310	PAPER AND PAPERBOARD	Y	
14111514	Paper pads or notebooks	Paper Materials and Products	Paper products	Printing and writing paper	Paper pads or notebooks	9310	PAPER AND PAPERBOARD	Y	
14111530	Self adhesive note paper	Paper Materials and Products	Paper products	Printing and writing paper	Self adhesive note paper	9310	PAPER AND PAPERBOARD	Y	
14111703	Paper towels	Paper Materials and Products	Paper products	Personal paper products	Paper towels	9310	PAPER AND PAPERBOARD	Y	
14111705	Paper napkins or serviettes	Paper Materials and Products	Paper products	Personal paper products	Paper napkins or serviettes	9310	PAPER AND PAPERBOARD	Y	
14121500	Paperboard and packaging papers	Paper Materials and Products	Industrial use papers	Paperboard and packaging papers		9310	PAPER AND PAPERBOARD	Y	
14121600	Tissue papers	Paper Materials and Products	Industrial use papers	Tissue papers		9310	PAPER AND PAPERBOARD	Y	

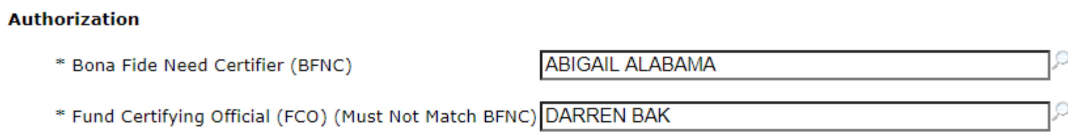
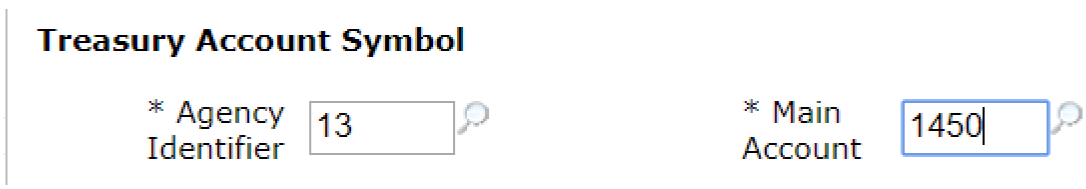
➢ Click the *Select* icon of the code you want to choose (i.e. 14111507)

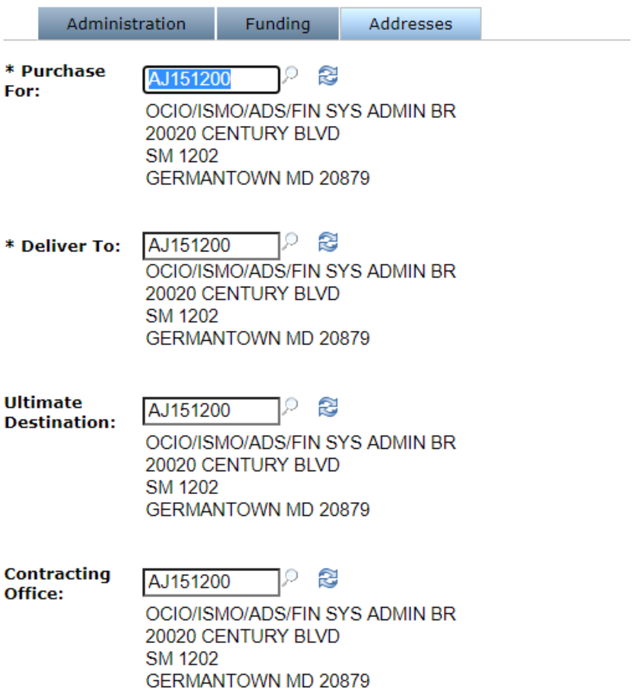
Step	Action
7	The screen will return with the UNSPSC and FSC codes populated:  * UNSPSC Code: 14111507 Printer or copier paper * FSC Code: 9310 PAPER AND PAPERBOARD * Purpose You have characters remaining for your input. ➢ Enter the ***Purpose*** (i.e. TO PURCHASE FAX/COPY PAPER)  * Purpose TO PURCHASE COPY/FAX PAPER FOR THE OFFICE You have 1959 characters remaining for your input. Contract Number:
	Notes: ✓ *Contract Number and/or Delivery Number fields can be used if modifying an Award Number.* ✓ *Contract Number field can be used if purchasing from GSA*
8	The next field to be entered is the Suggested Vendor:  Suggested Vendor: Vendor Name: ➢ Click the ***Lookup*** icon for the ***Suggested Vendor*** field

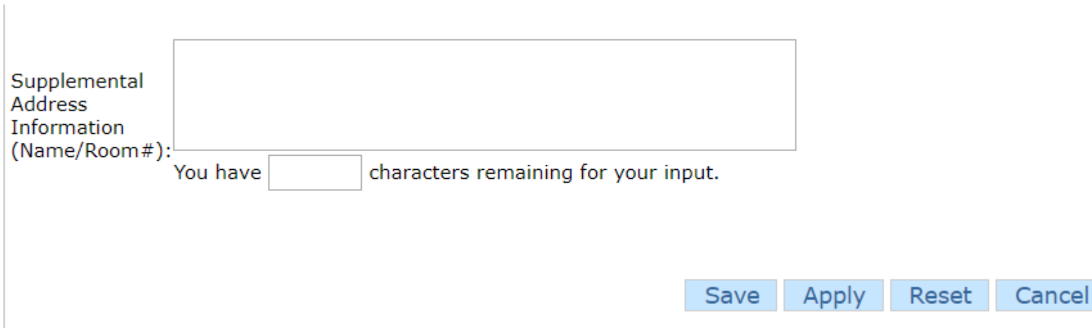
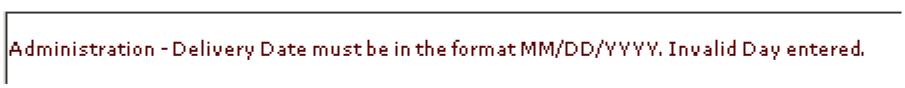
Step	Action
8a	A new window opens:  ➢ Select ***Vendor Name*** in the *Search Criteria* field ➢ Enter ***Staple*** in the *Begins With* field ➢ Click ***Search***
	Notes: ✓ *If you are unable to find the vendor, change the Country drop-down selection to ALL and click Search again.*
8b	The system will bring back all available options matching the criteria you used to search:  Vendor ID: 00006041 — Vendor Name: STAPLES, INC. — City: KAHUKU — State/Province: HI — Tax ID: 204870168 — DUNS: 624650235 — DoDAAC: — Select Displaying 1 - 1 / 1 ➢ Click the *Select* icon of the code you want to choose (i.e. Staples)

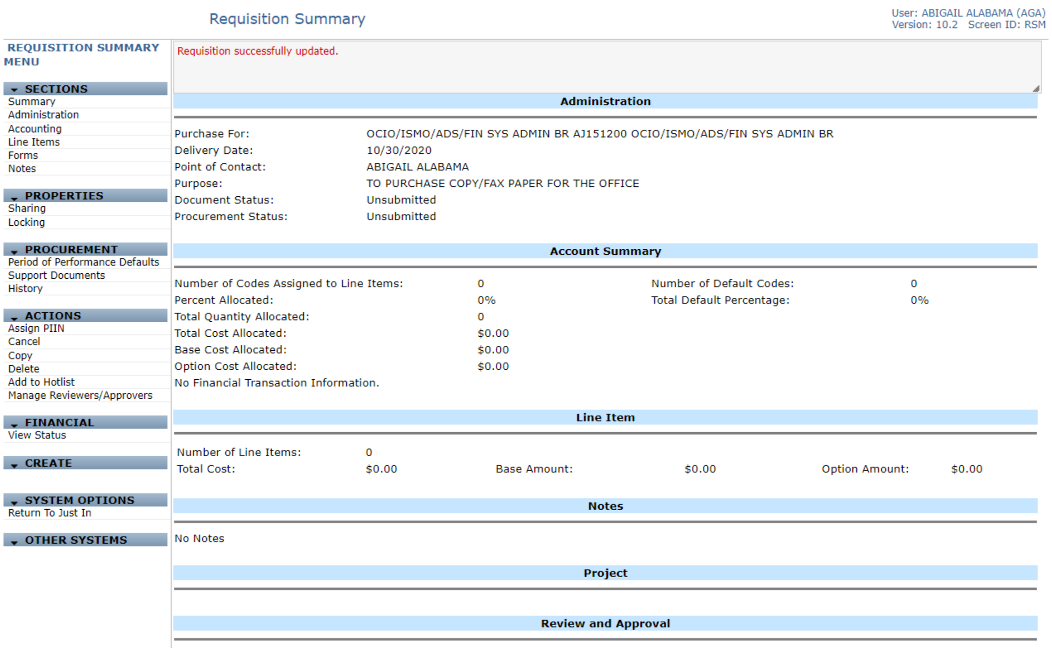
Step	Action
	Notes: ✓ *If you click on the Vendor ID link, a new window opens displaying the details of the vendor. Doing this does not select the vendor.* ✓ *Selecting the vendor does not mean acquisitions will use that vendor to order this item.* ✓ *When searching in C.Request, the more values you enter, the fewer entries will be returned. Use the fewest values you need to locate the Vendor.*
9	The screen will return with the Suggested Vendor field populated:  At this time if you click Save or Apply you'd get error messages Funding - Funds Certified By is a mandatory field. Funding - Authorized By is a mandatory field. Funding - Agency Identifier is a mandatory field. Funding - Main Account is a mandatory field. Apply would keep you on the same page/tab and Save would take you to the next mandatory field. Neither will actually save any data until all mandatory fields have been filled in.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>Click on the Funding Tab (if Save didn’t already take you there):

➢ Click the Lookup icon for the Bona fide Need Certifier field</td></tr>
<tr><td>10a</td><td>A new window opens:

As you can see this lookup does not have the Bona Fide Needs Certifier as a search criteria. So you’ll need to know who you’re searching for or typing in the field.
➢ Search on your training name
➢ Click Search
➢ Click the Select icon
➢ Click the Lookup icon for the Funds Certifier field
➢ Select Darren Bak</td></tr>
</table>

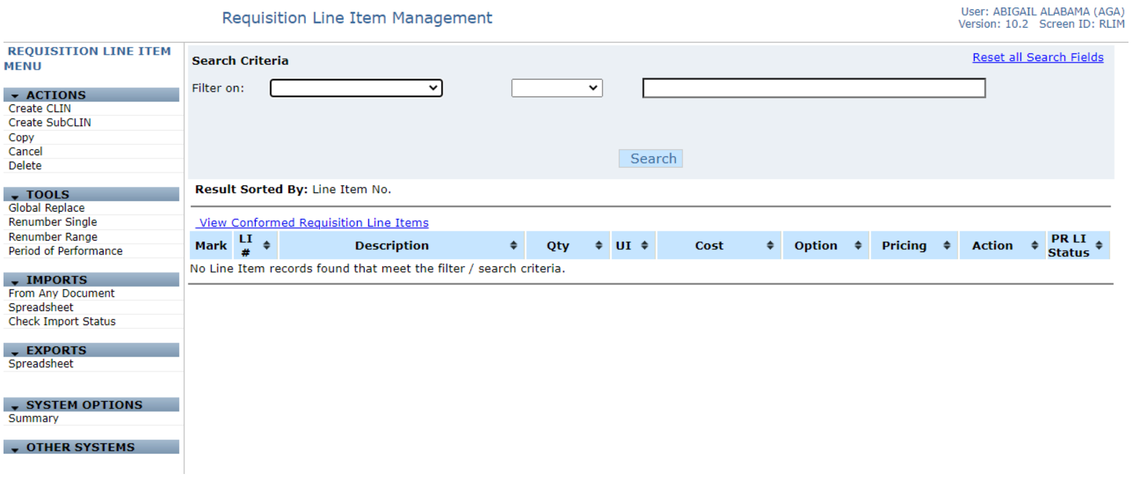
Step	Action
11	The fields will be filled out:  Next onto the next section:  In the **Treasury Account Symbol** section, enter information in the following fields: *Agency Identifier* (i.e.13) *Main Account* (i.e. 1450)  ➢ Click on the *Addresses* tab
	Notes: ✓ *Please make sure to use the look up icons to search on these fields. Do NOT type them.* ✓ *The Sub Account and Initiative fields are currently not being utilized.*

Step	Action
12	All the addresses have been populated from my profile, if added there:  ➢ Scroll down to view/modify all of the fields.
	Notes: ✓ *Addresses automatically fill out from your Profile.* ✓ *If any address needs to be changed, it can be done here for this requisition.* ✓ *Use the lookup icon to search for a new address.*

Step	Action
12a	At the bottom of the screen is a non-mandatory field in the Administration screen, however it will be mandatory on the CLINs.  ➢ Enter "**N/A**" ➢ Click **Save**
12b	If any errors are found in the Administration screen they will show in the message area like the following:  ➢ Fix them and click **Save** again
	Notes: ✓ *You may have to use the scroll bar to view all the mandatory fields.* ✓ *Clicking **Save** to save your changes will only work after all mandatory fields have been entered.* ✓ *Clicking **Apply** on each tab will not save changes unless all mandatory fields have been entered.* ✓ *If Administration screen mandatory fields are not filled out and saved prior to closing out the requisition, you will be unable to locate it on your Hotlist or Recently Accessed view tables. It will only be able to be found using the Worksheet search.*

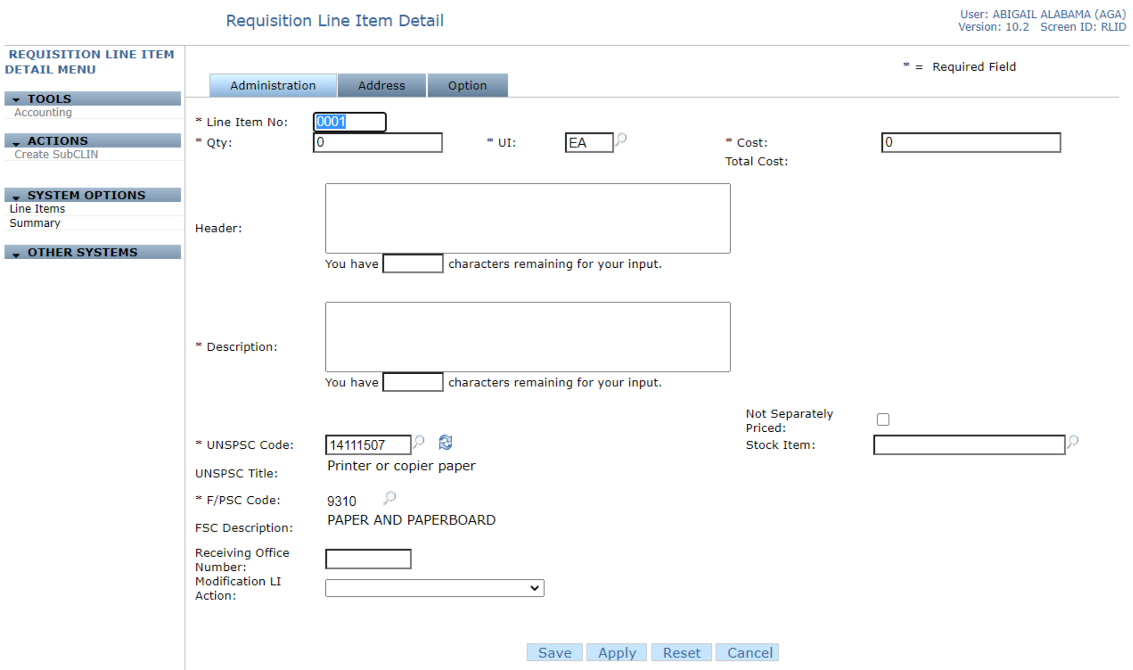
Step	Action
13	The **Requisition Summary** screen appears:  ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ A message comes back Requisition added to Hot List successfully. ➢ Click ***Line Items*** from the *Menu Options*
	Notes: ✓ *The Requisition Summary screen is the "home" screen for the requisition. It displays all information pertaining to the requisition at a summary level.*

Step	Action
14	The **Requisition Line Item Management** screen appears:



➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
15a	The **Requisition Line Item Detail** screen appears:



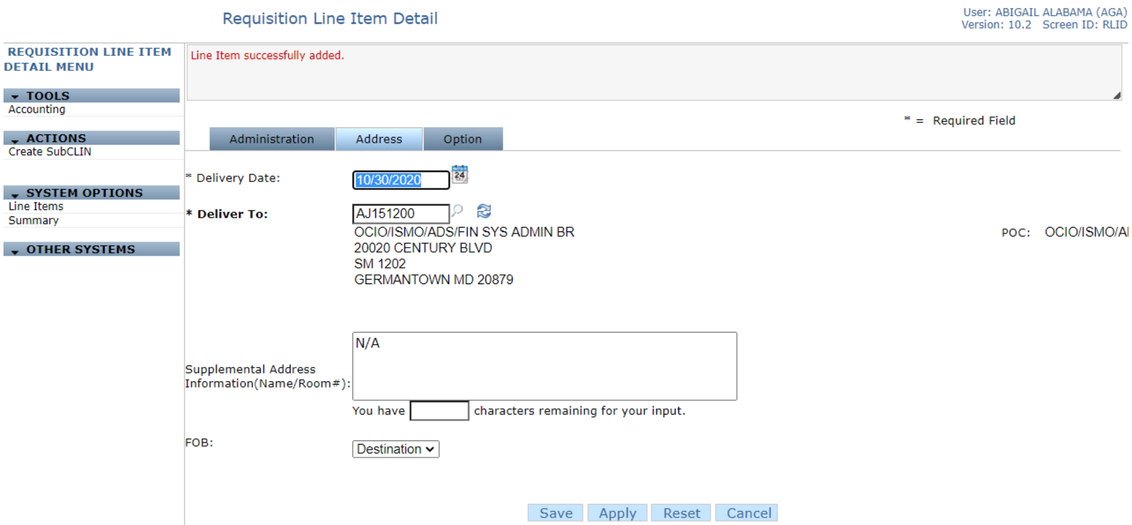
From the *Administration* view tab (Line 0001):

- Enter the ***Qty*** (i.e. 100)
- Enter the ***UI*** (i.e. REAM)
- Enter the ***Cost*** (i.e. 6.59)
- Enter the ***Description*** (i.e. FAX/COPIER PAPER)
- Enter the ***Receiving Office Number*** (i.e. copy an Address Code)
- Click on the *Address* tab

Notes:

- ✓ *The UNSPSC & FSC for the line item will default from the Administration screen.*
- ✓ *If any code needs to be changed, use the lookup icon or enter the new code in that field.*
- ✓ *Header information entered on this screen appears on the printed form above the line information.*

Step	Action
15b	From the *Address* view tab:



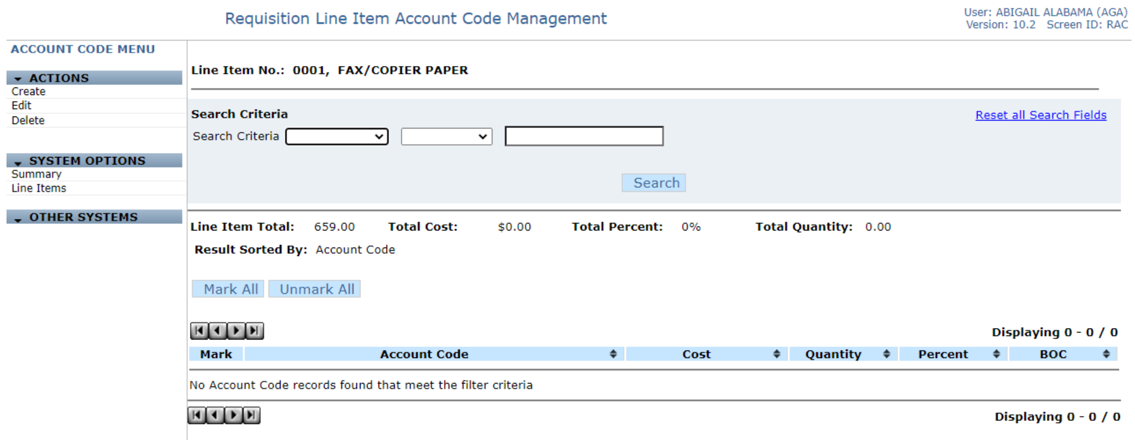
- Verify/Modify Delivery Date
- Verify/Modify Addresses
- Copy the Address Code
- Go back to the *Administration* view tab
- Paste the Address Code in the ***Receiving Office Number***
- Click ***Apply***
- Click ***Accounting*** from the *Menu Options*

Notes:

- ✓ *The Address Tab information is extracted from the information provided on the Administration screen.*
- ✓ *If the delivery date is different for the line compared to what was added on the Administration screen, make the change here.*
- ✓ *Each line item's address area can be edited to have its own shipping information and delivery date(s).*
- ✓ *Supplemental Address Information is **mandatory** on CLINs*
- ✓ *The Option Tab **<u>should only</u>** be used when dealing with base and option years.*
- ✓ *Apply needs to be done here because it will save our line information and give us the ability to then add line accounting.*
- ✓ *If save was done instead of apply, the user would have to re-open the line in order to see the Accounting option for the line.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16</td><td>

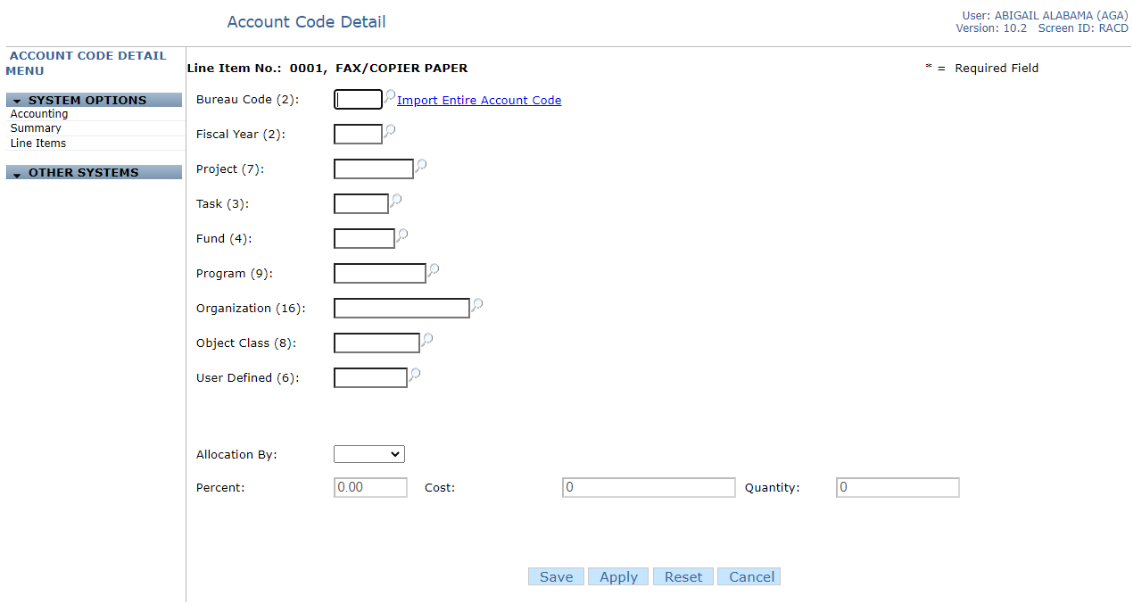
The **Account Code Management** screen appears:



➢ Click ***Create*** from the *Menu Options*

</td></tr>
<tr><td>17a</td><td>

The **Account Code Detail** screen appears:

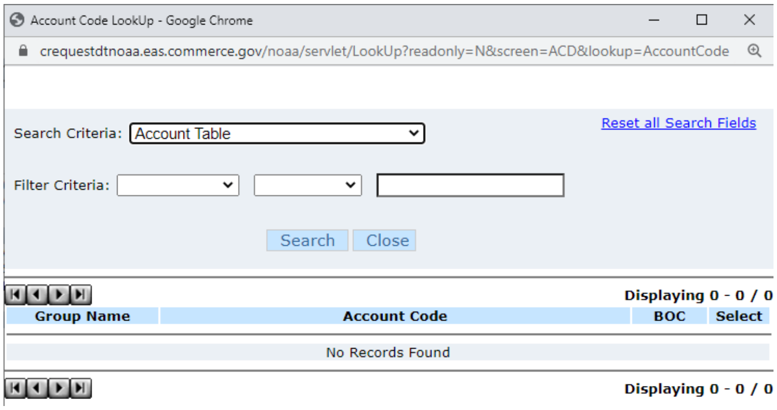


➢ Click the "**Import Entire Account Code**" link

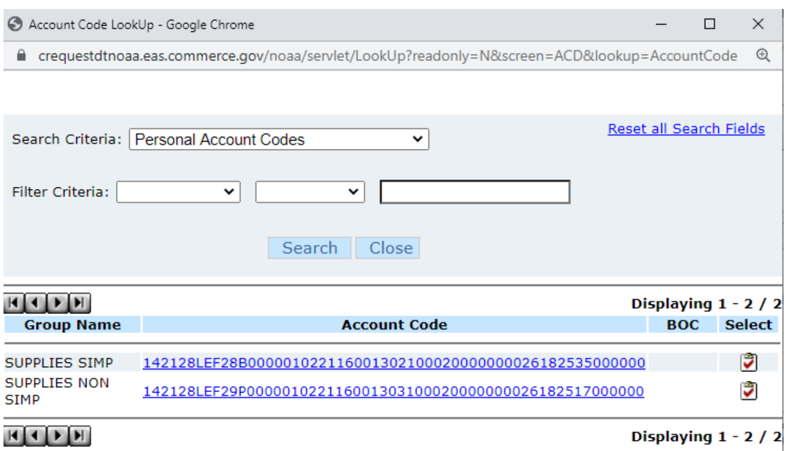
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17b</td><td>

A new window will open:



The default will be **Account Table**. Click on the drop-down Search Criteria field and select **Personal Account Codes**. Click ***Search***.



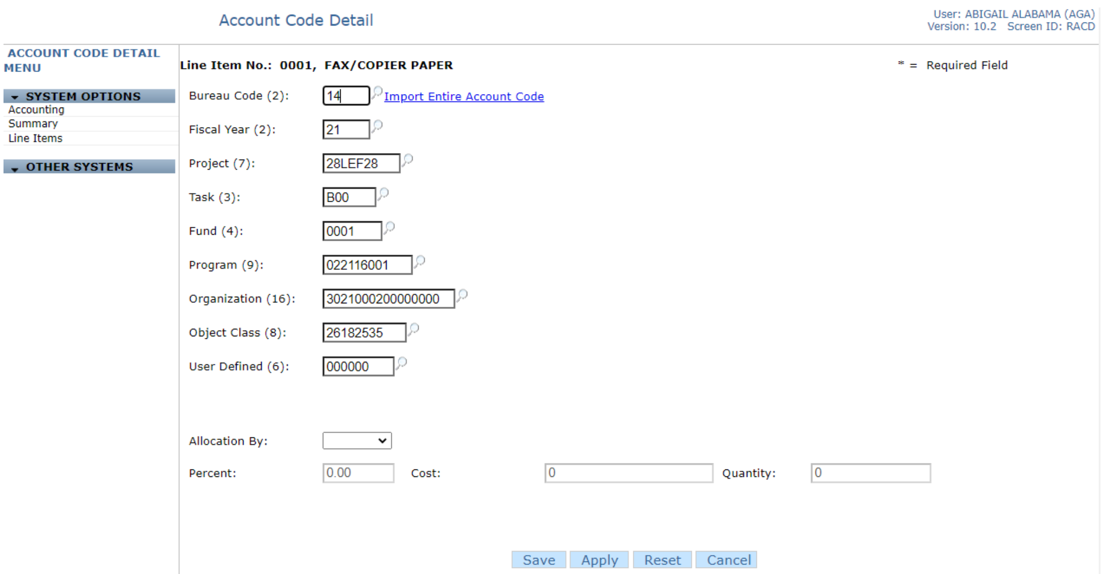
All Account Codes entered on your Profile appear here.

➢ Click the *Select* icon for the code you want to select

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>17c</td><td>

The fields then will populate with the values from the account code selected.



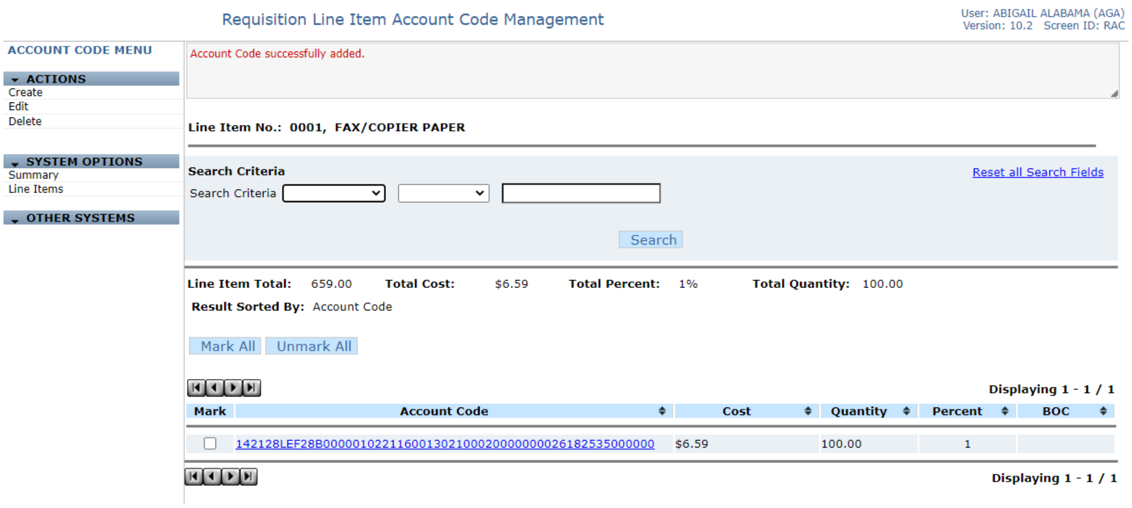
- Select ***Allocation By*** (i.e. Cost)
- Enter ***Cost*** (i.e.659.00)
- Enter ***Quantity*** (i.e.100.00)
- Click ***Save***

</td></tr>
<tr><td></td><td>

Notes:

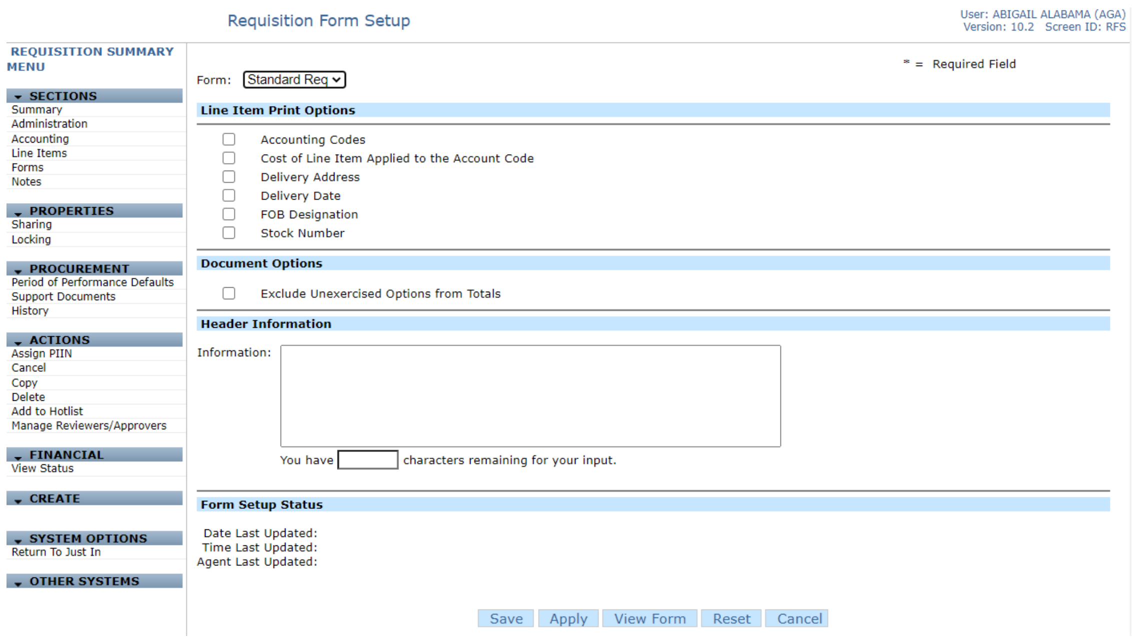
- ✓ *Line Accounting allows a user to enter the amount on the ACCS by Percent, Cost and/or Quantity.*
- ✓ *Depending upon which one you choose, different fields will need to be entered.*
- ✓ *If using Cost, you will also have to enter the Quantity and vice versa. Cost is option most commonly used*

</td></tr>
</table>

Step	Action
18	The **Account Code Management** screen appears with the accounting now listed.  ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19</td><td>

The **Requisition Form Setup** screen appears:



- Click the ***Accounting Codes*** checkbox
- Click the ***Cost of Line Item Applied to the Account Code*** checkbox
- Click the ***Delivery Address*** checkbox
- Click the ***Delivery Date*** checkbox
- Click ***View Form***

</td></tr>
<tr><td></td><td>

Notes:

- ✓ *Each box that is checked displays information on the printed copy of the requisition.*
- ✓ *You must check at least one box in the **Line Item Print Options** section. Any others are optional.*
- ✓ *Header information appears above the line items on the printed form.*
- ✓ *Click Apply if you wish to keep the options checked for this requisition.*

</td></tr>
</table>

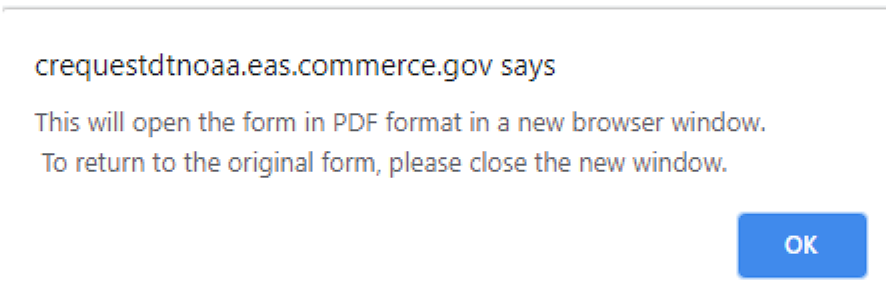
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Notes:

- ✓ *Each box that is checked displays information on the printed copy of the requisition.*
- ✓ *Header information appears above the line items on the printed form.*
- ✓ *Click Apply if you wish to keep the options checked for this requisition.*

</td></tr>
<tr><td>20</td><td>

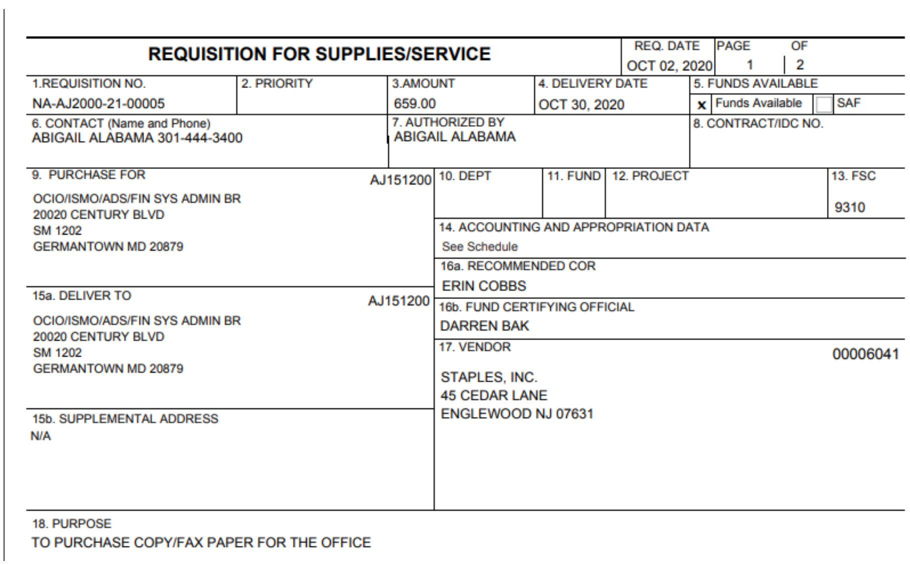
A warning message appears:



➢ Click ***OK***

</td></tr>
<tr><td>21</td><td>

A new tab/window will open showing your requisition form in Adobe (pdf) format. You can then print or save your document.

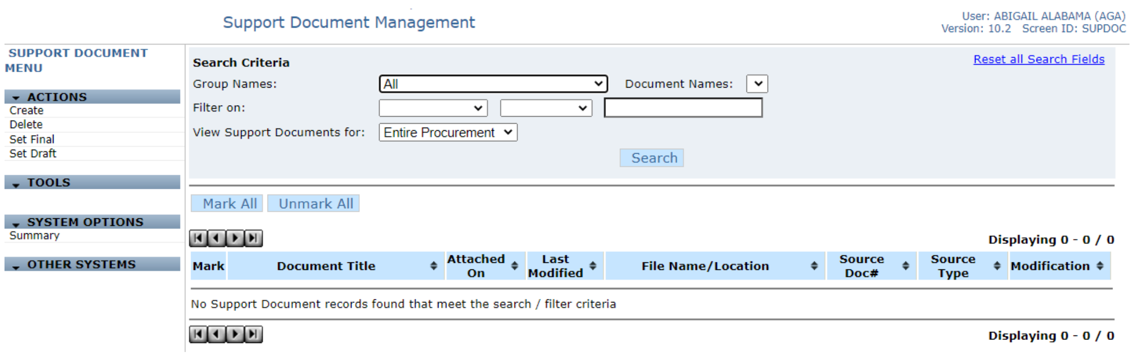
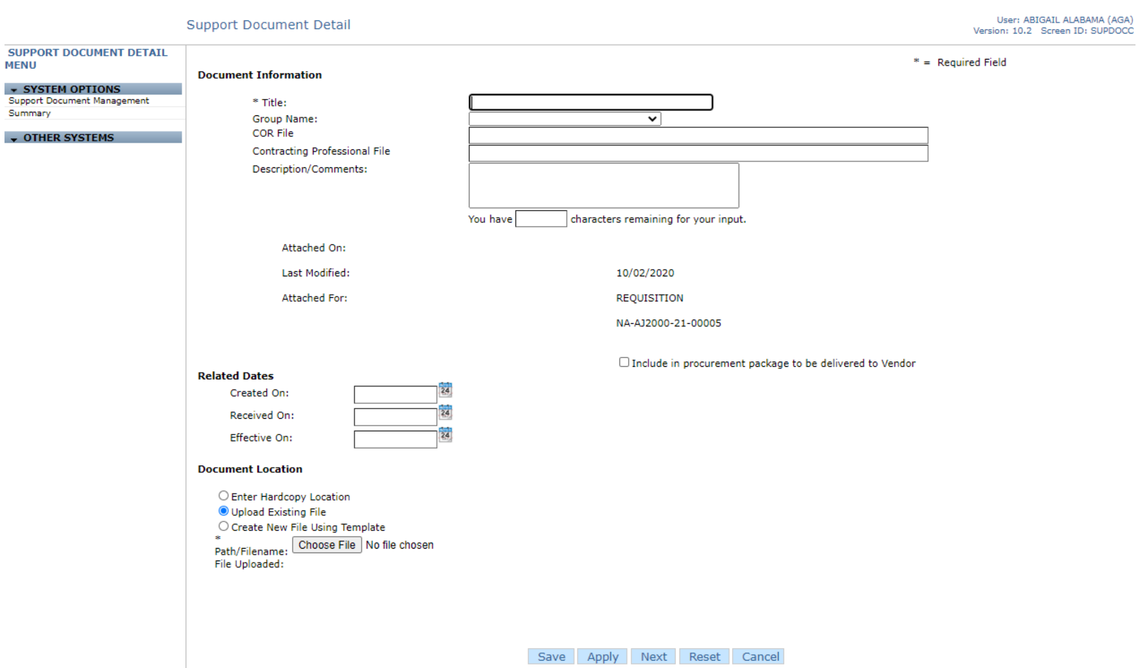


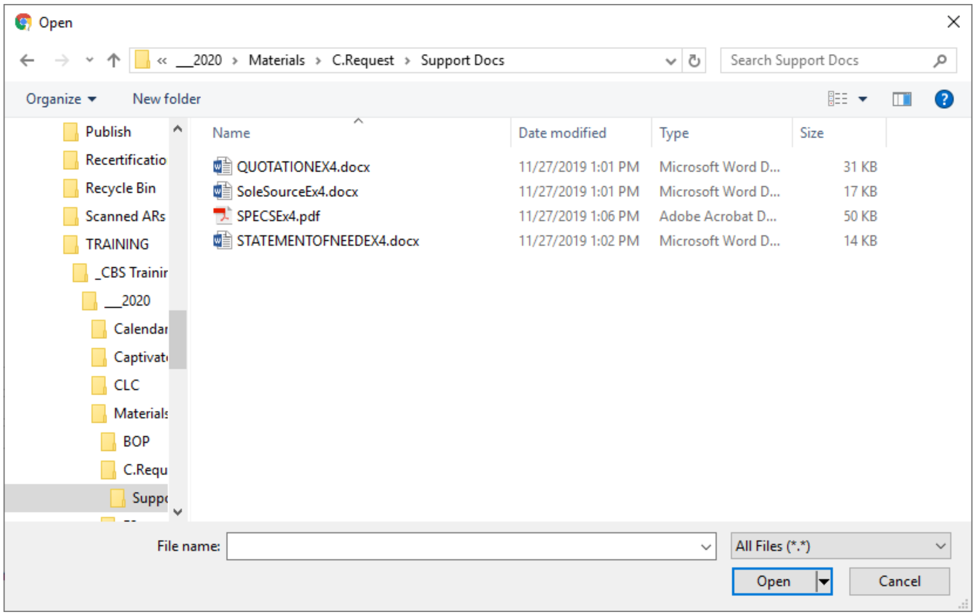
REQUISITION FOR SUPPLIES/SERVICE
REQ. DATE: OCT 02, 2020 | PAGE 1 OF 2
1.REQUISITION NO.: NA-AJ2000-21-00005
2. PRIORITY:
3.AMOUNT: 659.00
4. DELIVERY DATE: OCT 30, 2020
5. FUNDS AVAILABLE: x Funds Available | SAF
6. CONTACT (Name and Phone): ABIGAIL ALABAMA 301-444-3400
7. AUTHORIZED BY: ABIGAIL ALABAMA
8. CONTRACT/IDC NO.:
9. PURCHASE FOR: AJ151200
OCIO/ISMO/ADS/FIN SYS ADMIN BR
20020 CENTURY BLVD
SM 1202
GERMANTOWN MD 20879
10. DEPT:
11. FUND:
12. PROJECT:
13. FSC: 9310
14. ACCOUNTING AND APPROPRIATION DATA: See Schedule
15a. DELIVER TO: AJ151200
OCIO/ISMO/ADS/FIN SYS ADMIN BR
20020 CENTURY BLVD
SM 1202
GERMANTOWN MD 20879
15b. SUPPLEMENTAL ADDRESS: N/A
16a. RECOMMENDED COR: ERIN COBBS
16b. FUND CERTIFYING OFFICIAL: DARREN BAK
17. VENDOR: 00006041
STAPLES, INC.
45 CEDAR LANE
ENGLEWOOD NJ 07631
18. PURPOSE: TO PURCHASE COPY/FAX PAPER FOR THE OFFICE

➢ Close the tab/window

➢ Click ***Support Documents*** from the *Menu Options* (found under ***Procurement***)

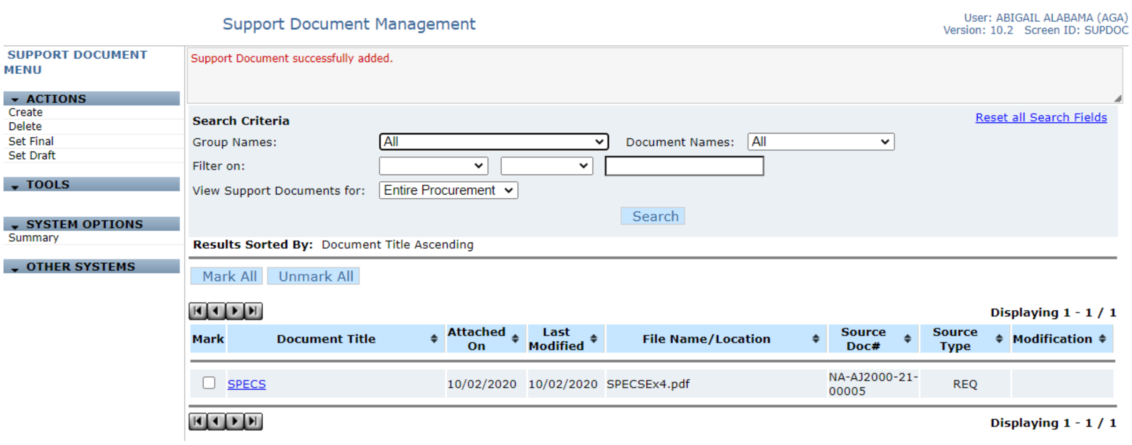
</td></tr>
</table>

Step	Action
	Notes: ✓ *A Supplementary Page may appear with the print out. Do not worry about it.* ✓ *How the document appears will depend on how the browser was set up.*
22	The **Support Document Management** screen appears. Attach any supporting documentation in electronic format that you think is important for this requisition.  ➢ Click ***Create*** from the *Menu Options*
22a	The **Support Document Detail** screen appears. 

Step	Action
22b	➢ Enter ***Title*** (i.e. SPECS) ➢ Click Browse... by Path/Filename This opens a dialog box that allows you to select the file you want to attach to the requisition. Attached files should have additional information pertaining to the requisition, such as an e-quote, or specifications for the item.  ➢ Once the file has been highlighted, click ***Open*** ➢ Once the file has been added, click ***Save***

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22c</td><td>

The **Support Document Management** screen appears now showing the support document.



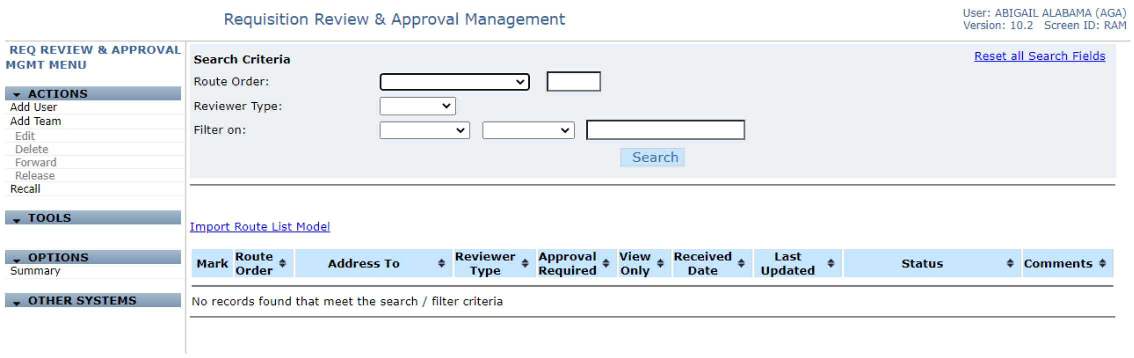
- Click ***Summary*** from the *Menu Options*
- Click ***Manage Reviewers/Approvers*** from the *Menu Options*

</td></tr>
<tr><td></td><td>

Notes:

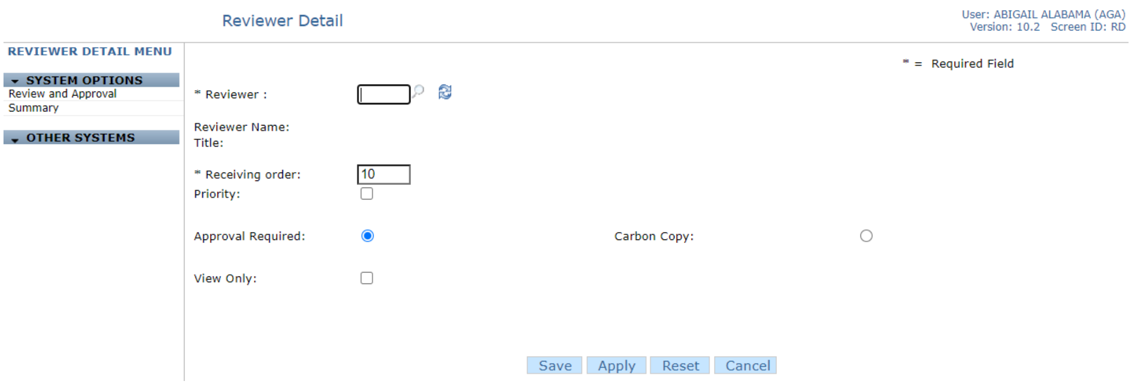
- ✓ *Support document file names should not have any special characters or spaces.*
- ✓ *The file name should not be longer than 20 characters.*
- ✓ *If you have multiple documents with different file extensions (xls, doc, pdf) be sure to rename them different file names, otherwise you will receive error messages.*
- ✓ *Best supported documents extensions: .txt, .doc/.docx, .xls/.xlsx, & pdf.*
- ✓ *You will need to load each document separately.*

</td></tr>
</table>

Step	Action
23	The **Requisition Review & Approval Management** screen appears. This is where you will set up the routing path for your document.  ➢ Click ***Add User*** from the *Menu Options*
	Notes: ✓ *Offices that have set up route models can select IMPORT ROUTE LIST MODEL.* ✓ *If an office would like a Route List Model set up, because their reviewers/approvers do not change, will have to contact the NOAA Client Services Help Desk to do so.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>24</td><td>

The **Requisition Reviewer Detail** screen appears. It is here where you will be entering your information pertaining on how your requisition will route through the system.



- Enter or Search for the ***Reviewer Code*** (i.e. Pauline Garcia)
- Leave the ***Receiving Order*** the number as is
- Make sure ***Approval Required*** radio button is selected
- Check the ***View Only*** checkbox
- Click ***Save***

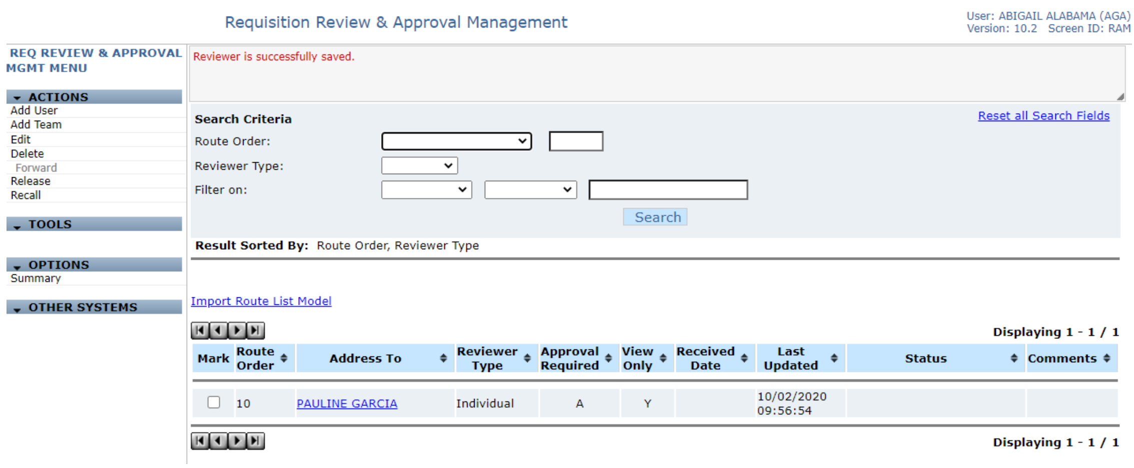
</td></tr>
<tr><td></td><td>

Notes:

- *If entering the code, make sure to click the Refresh Icon to make sure you have the correct person entered in the field.*
- *C.Request automatically creates each "receiving order" number in increments of 10.*
- *If you need additional people to review before the final approval you may enter them as 10, 11, 12, etc.*
- *If you have a reviewer prior to an approver, you will need to select Carbon Copy. That will automatically change to view only.*
- *A Carbon Copy can only be completed at a level after an approval one has been completed.*
- *All approval levels, except for the FCO level, should have the Approval and View Only checkboxes checked.*
- *If the document is already committed, you will not have to check the View Only checkbox for the approvers.*

</td></tr>
</table>

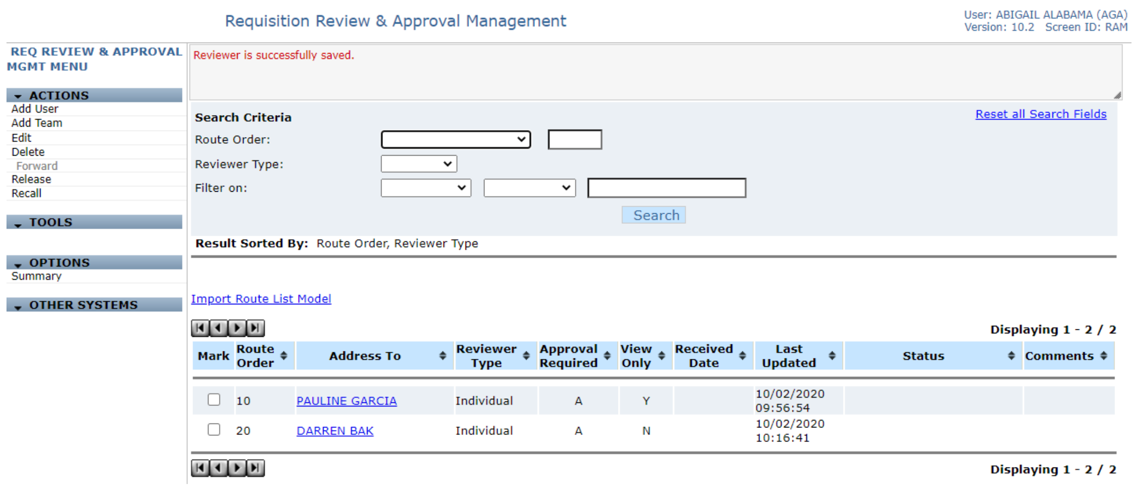
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>25</td><td>
The Requisition Review & Approval Management screen appears with the first reviewer/approver showing.



You also need to add the FCO to the routing list:
➢ Select Add User on the Actions Menu
➢ Enter or search for the Reviewer Code (i.e. Darren Bak)
➢ Leave the Receiving Order the number as is
➢ Make sure Approval Required radio button is selected
➢ If the Approval Required radio button is selected, DO NOT check the View Only checkbox
➢ Click Save
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>26</td><td>

The **Requisition Review & Approval Management** screen appears with the reviewers/approvers showing.



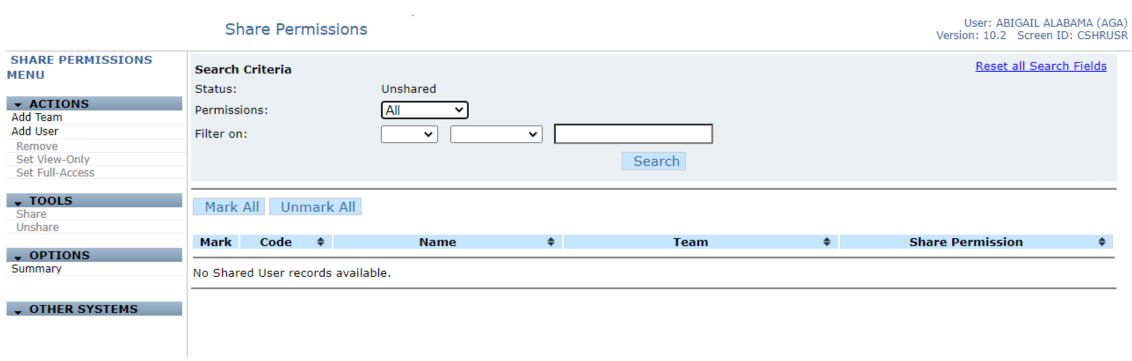
You may not have the capability to release the document through the routing process. You will have to share the document with the BFNC in your office. Each office operates under its own policy regarding releasing or sharing documents, so check you process before either releasing or sharing.

If you are in an office that allows you to commit the document, you will want to do the sharing first, because after the commitment has been accepted, you will be unable to share the document.

- Click ***Summary*** from the *Menu Options*
- Click ***Sharing*** in the menu options

</td></tr>
<tr><td>27</td><td>

The **Share Permissions** screen appears:

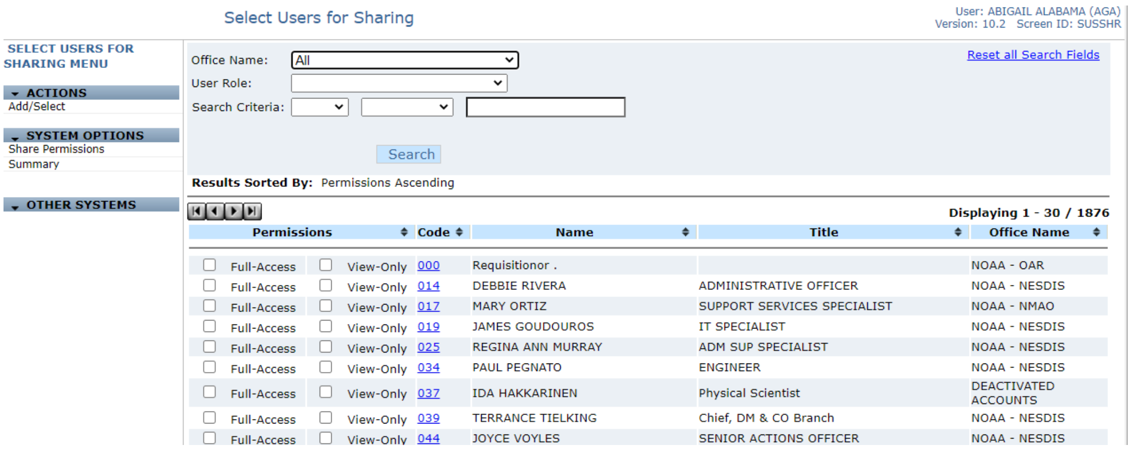


- Click ***Add User***

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td rowspan="2">28</td><td>

The **Select Users for Sharing** screen appears:



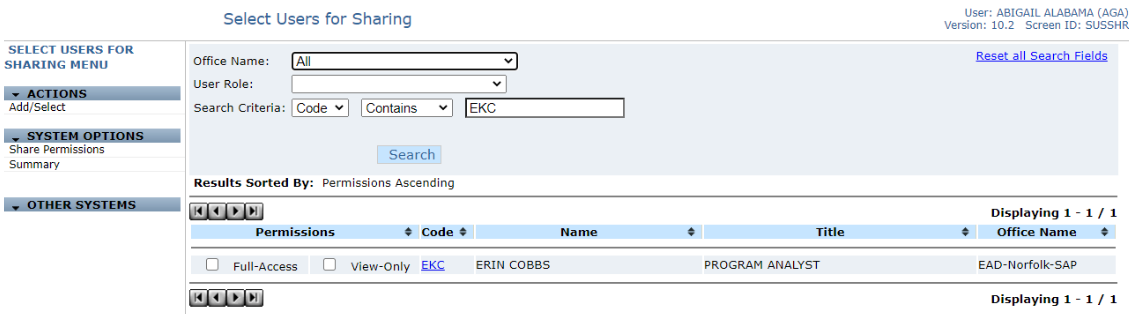
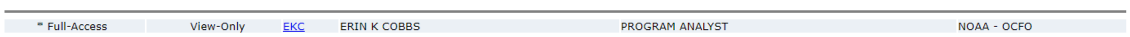
- Use the Search Criteria fields to locate the BFCN for your office (i.e. EKC)
- Click *Search*

</td></tr>
<tr><td>

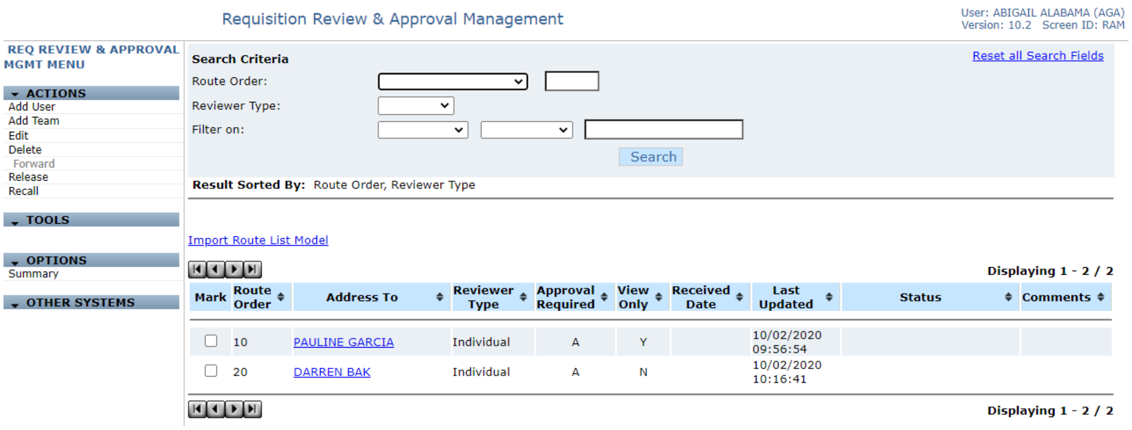
Notes:

- ✓ *Full-Access means the person you are sharing it with can change data on the document.*
- ✓ *View-only will only allow the user to view not edit/change it.*

</td></tr>
</table>

Step	Action
29a	Your search results appear:  ➢ Check the **checkbox** for the type of sharing permission (i.e. Full-Access) ➢ Click ***Add/Select*** The checkbox will be replaced with an asterisk (*)  ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Manage Reviewers/Approvers*** from the *Menu Options*
	Notes: ✓ *If you do not have the BFNC role, you would close out this document and move to another one. You would also let the BFNC know that the document has been shared with them.* ✓ *If you do have the BFNC role, the sharing permissions would not be necessary and you could release the routing list.* ✓ *For this exercise, we will release the document for approval but the FCO will be committing and submitting.*

Step	Action
30	The **Requisition Review & Approval Management** screen appears with the routing list showing:



- Click ***Release*** from the *Menu Options*

Notes:

- *Code under Approval Requested:*

  A = Approval Required

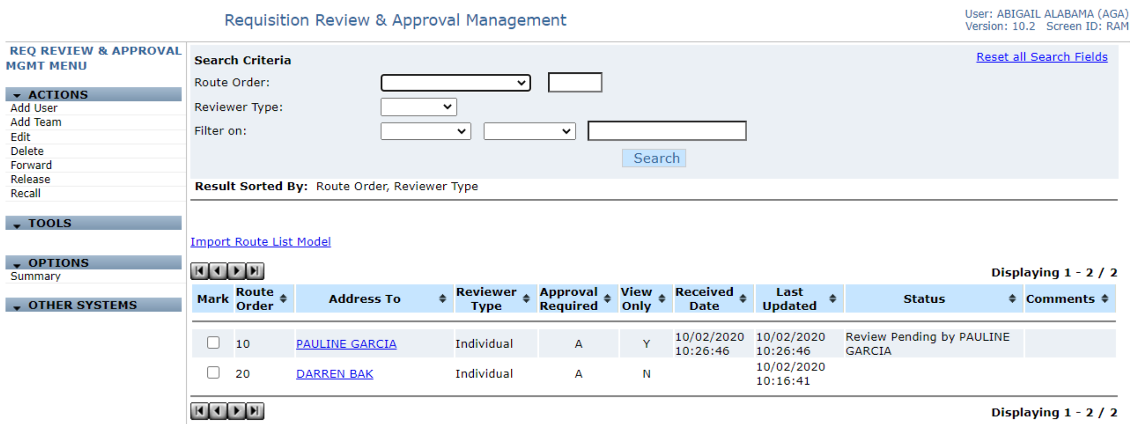
  C = Carbon Copy

- *Codes under View Only:*

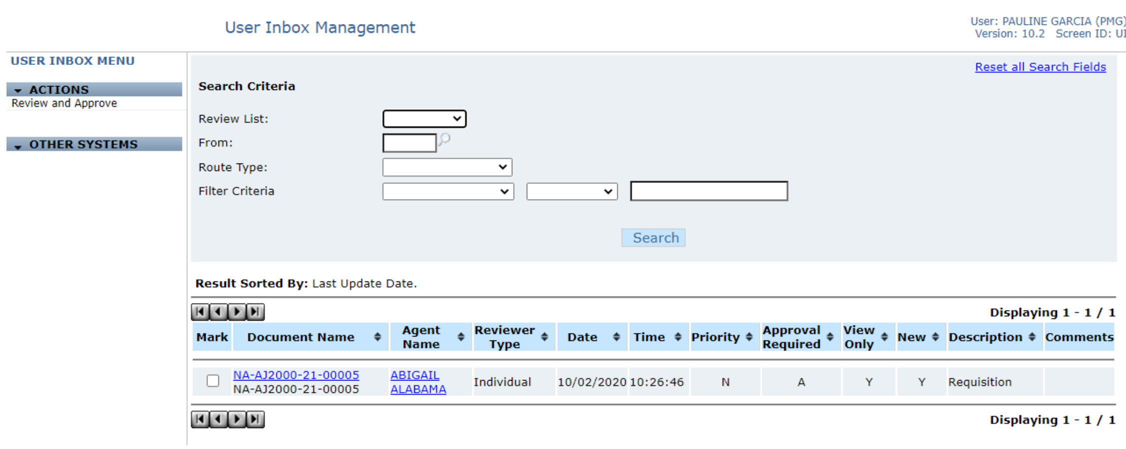
  Y = Yes, Read Only Access

  N = No, Full Read/Write Access

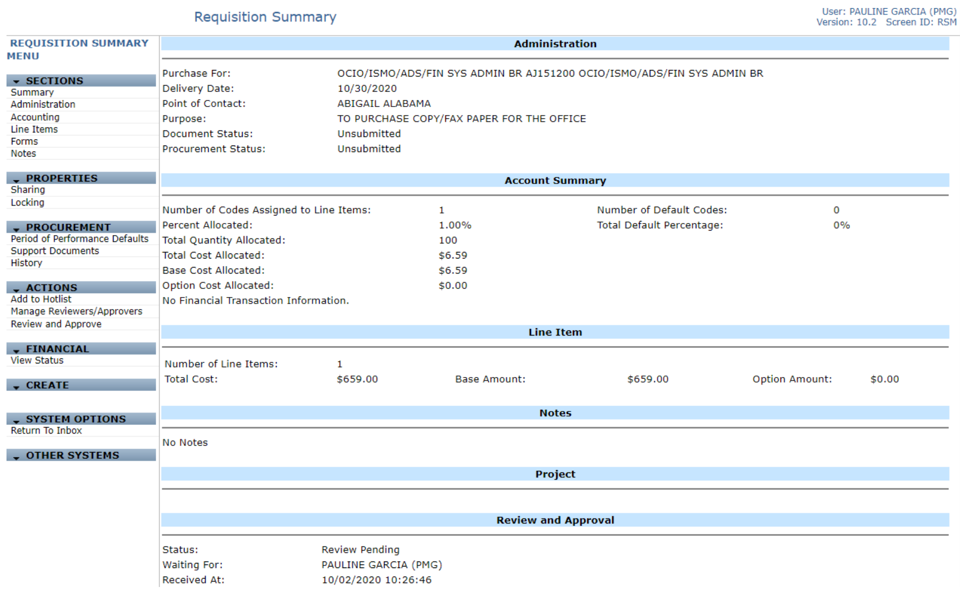
- *You can have multiple people listed in the same route order number.*
- *In order for the requisition to be sent to the people listed, you must click Release.*
- *You must have the BFNC role in order to release, if you do not, you will create the routing order and then share it with the BFNC for them to release it to be approved/submitted.*

Step	Action
31	The **Requisition Review & Approval Management** screen will then show the date/time and status of the review.  ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Home*** from the *Standard Menu Bar*
	Notes: ✓ *The recall option may be used if the status is not Reviewed or Approved.*

DEMONSTRATION - APPROVAL & SUBMIT PROCESS

Step	Action
A1	If the person who is on the routing list has set up in their profile to be notified when things come to their inbox, they will receive an email notification when it's sent to them. If they do not, you may have to contact them in order to have them do the approval.
A2	Once logged into C.Request: ➢ Click ***Inbox*** from the *Standard Menu Bar*  ➢ Click on the ***Document Name***

Step	Action
A3	The **Requisition Summary** screen appears:



The approver would then review all pieces of the requisition. Once they have reviewed the requisition and are ready to approve:

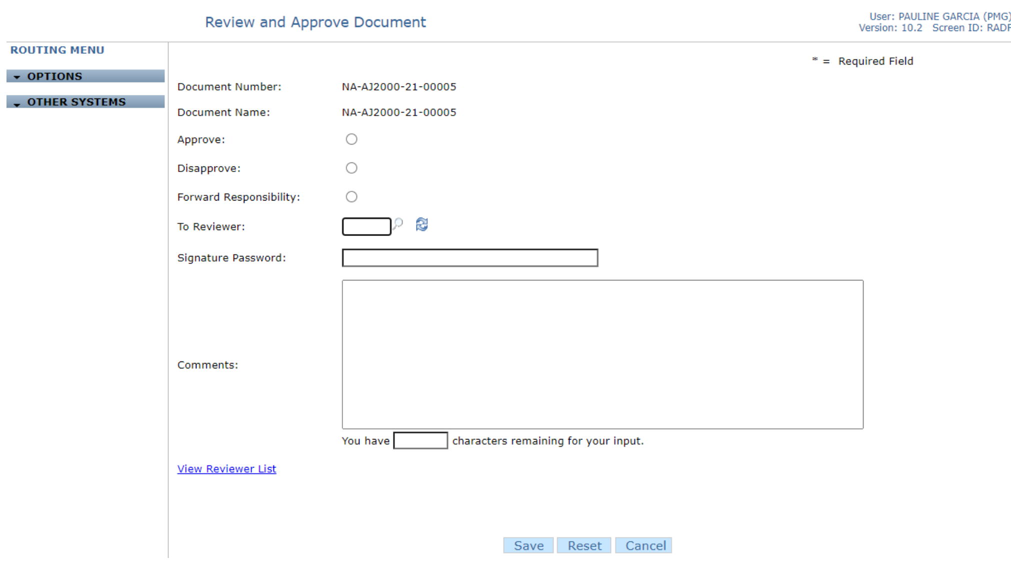
- Click ***Review and Approve*** from the *Menu Options*

Notes:

- ✓ *If the view only was done in the routing, the person will only be able to view the requisition, not be able to make changes.*
- ✓ *If you forgot to make it view only, but the requisition is committed, they will not be able to make changes.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td rowspan="2">A4</td><td>

The **Review Document** screen appears.



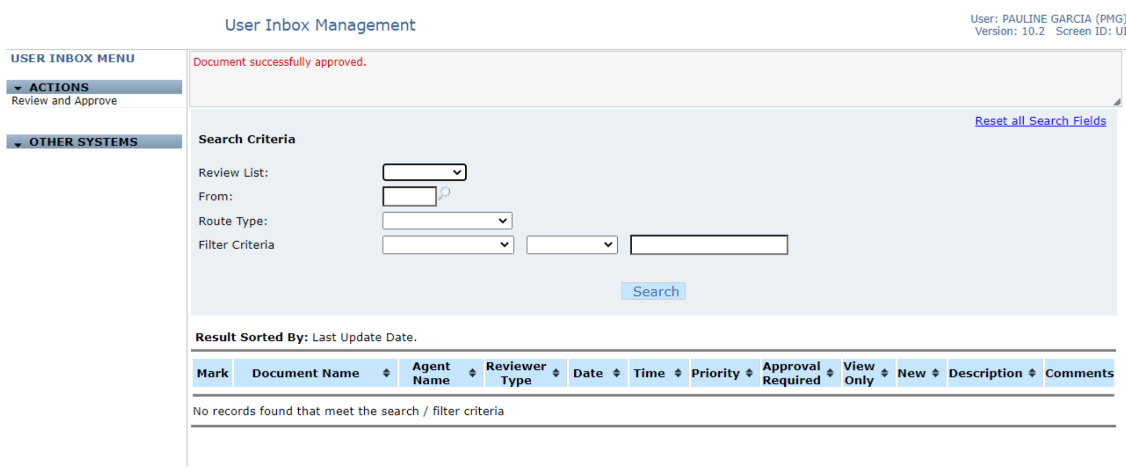
- Check the ***Approve*** radio button
- Enter your ***Signature Password***
- Enter any ***Comments***
- Click ***Save***

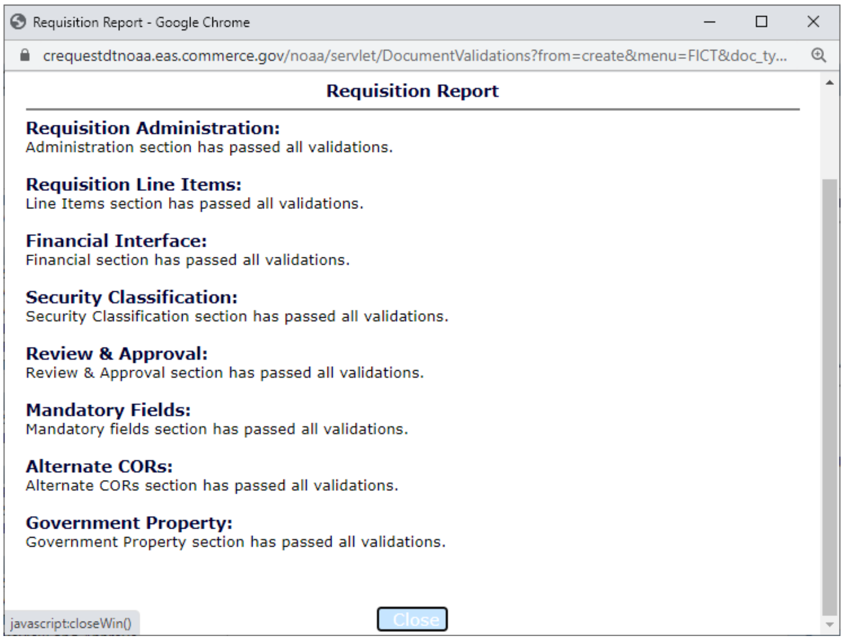
</td></tr>
<tr><td>

Notes:

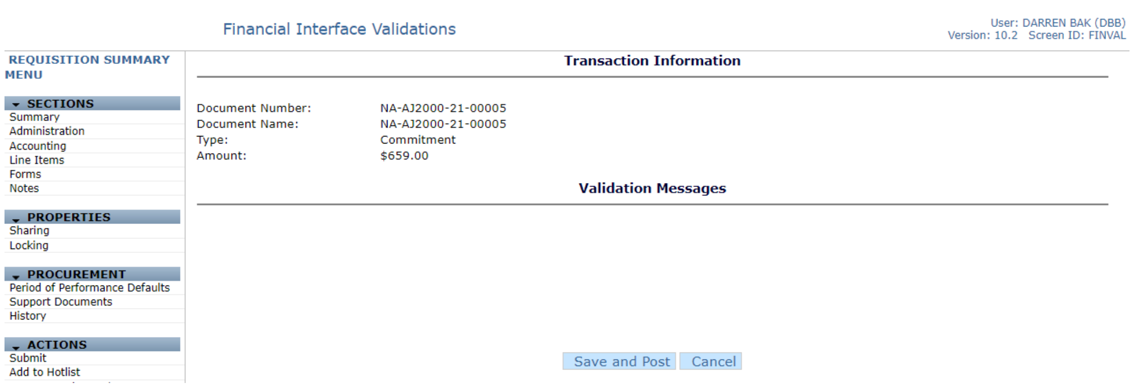
- ✓ *If as an approving official, you were to disapprove the document, make sure to enter comments as to why it's being disapproved.*
- ✓ *If as an approving official, you needed to someone else to review/approve, you would click the radio button Forward Responsibility and enter the code of the person in the To Review field.*
- ✓ *To view the whole routing list, click on View Reviewer List link on the screen.*

</td></tr>
</table>

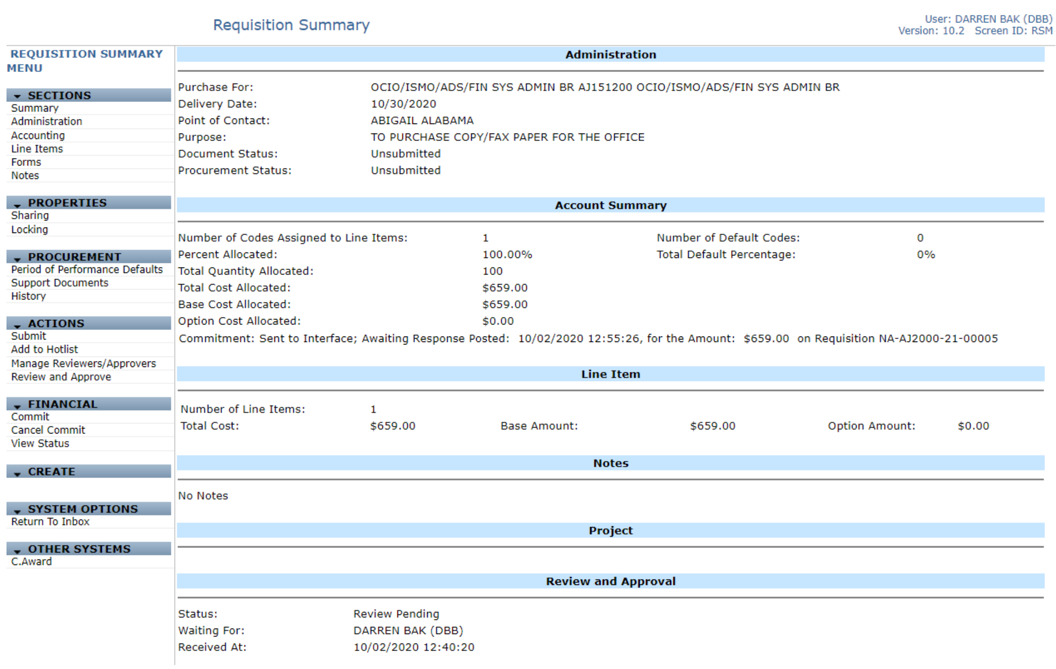
Step	Action
A5	The **User Inbox Management** screen appears and the document is now gone from their inbox and has been routed to the next person on the list. The requisitioner will receive an email stating the approval and who's it has been routed to next, if notifications in the profile have been set up. 
S1	In our training exercise, the next person on the routing list is the Funds Certifying Officer (FCO). Just like the other approver, they will have to log in and then go to their inbox to open up the requisition.
S2	Once on the **Requisition Summary** screen and after reviewing all parts of the requisition, instead of approving they will: ➢ Click ***Commit*** from the *Menu Options*

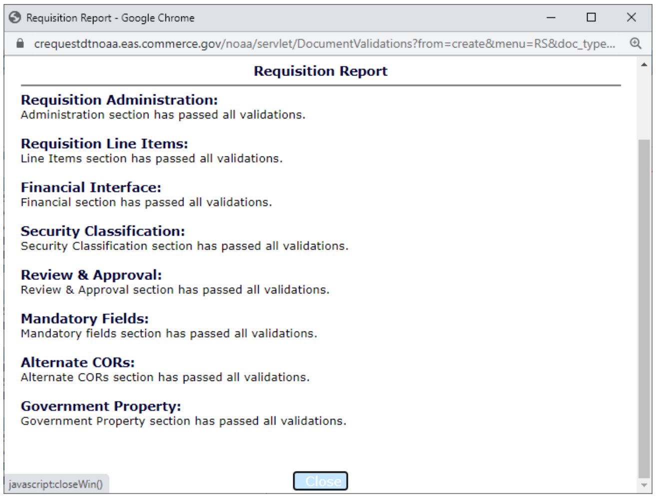
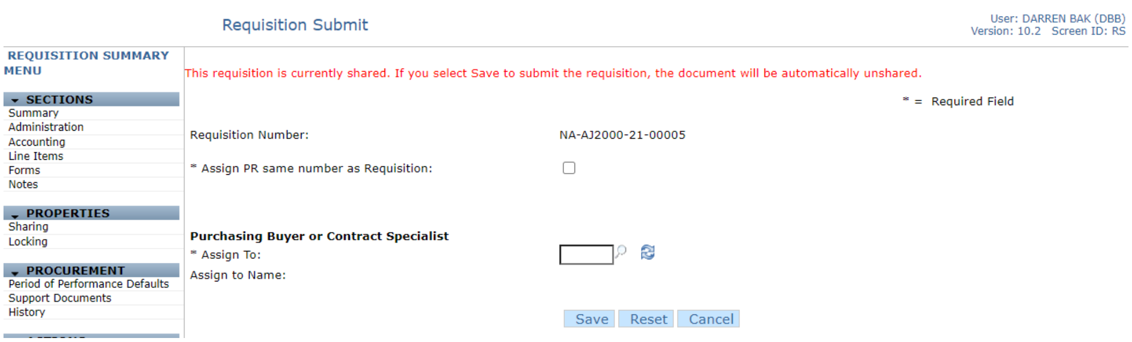
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>S3</td><td>A new window will appear. You will need to verify that everything has passed all validations.


If it did, click Close.

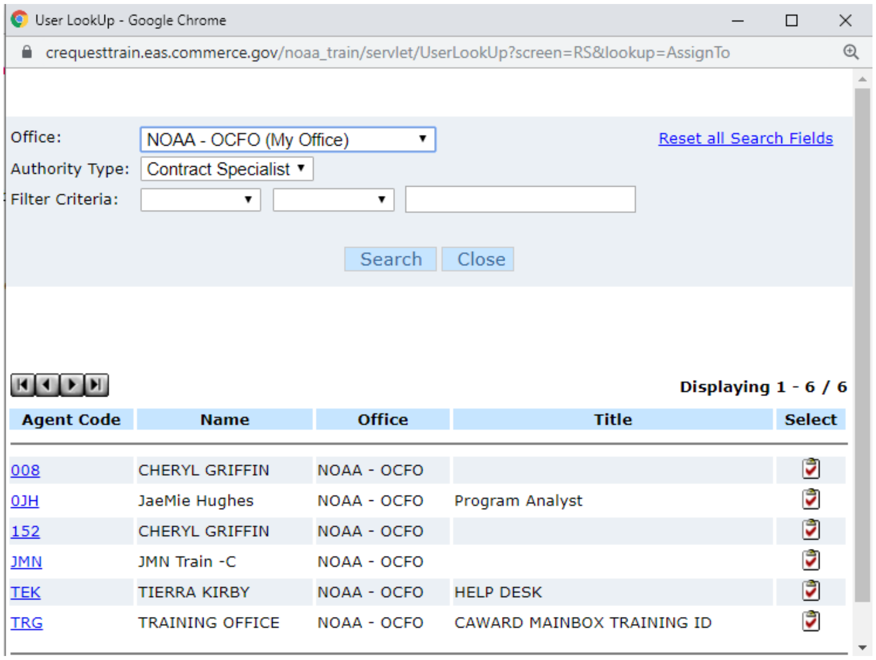
If it didn’t, click Close and then fix any errors and try committing again.</td></tr>
<tr><td>S4</td><td>The Financial Interface Validations screen will appear if there were no errors.


➢ Validate the dollar amount
➢ Click Save and Post</td></tr>
</table>

Step	Action
	Notes: ✓ *Please only click the Save and Post link once. Double-clicking will cause issues within CFS.*
S5	The **Requisition Summary** screen appears. You should now have in the *Account Summary* area that a commitment has been sent.  ➢ Click ***Summary*** from the *Menu Options* to refresh the screen
S6	Once you receive the message that the commitment went through do the following: Commitment: Accepted/Approved by Financial System Posted: 10/02/2020 12:55:26, for the Amount: $659.00 on Requisition NA-AJ2000-21-00005 ➢ Click ***Submit*** from the *Menu Options.*
	Notes: ✓ *Commitment needs to be done prior to submission.* ✓ *FCO's are encouraged to be the ones doing the commitment in case of any changes needed prior to their approval.* ✓ *The commitment is not actually doing a funds check, it is only verifying that the ACCS information is a valid and active one in CFS.*

Step	Action
S7	A new window will appear. You will need to verify that everything has passed all validations.  If it did, click ***Close***. If it didn't, click ***Close*** and then return back to the requisitioner and have them fix the issue and re-route.
S8	The **Requisition Submit** screen appears  ➢ Check the ***Assign PR same number as Requisition*** checkbox ➢ Click on the ***Lookup*** icon for the ***Purchasing Buyer or Contract Specialist*** field

Step	Action
S9	A new window opens which allows the user to find a buyer or contract specialist for a particular office. You may need to change the default office and authority type to send it to the correct mailbox:



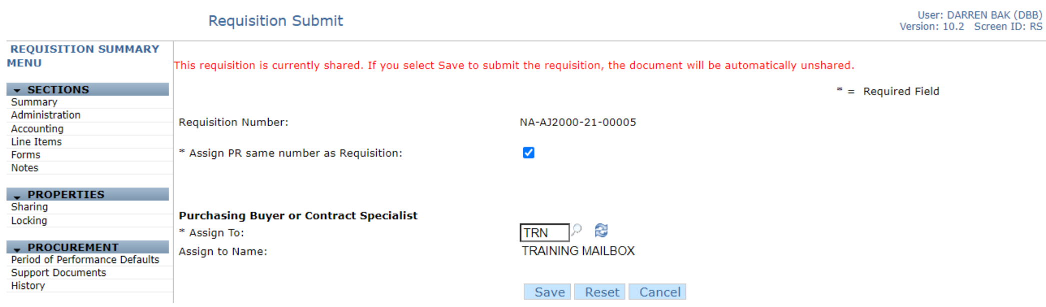
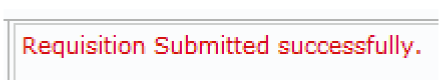
➢ Click the *Select* icon of the code you want to choose (i.e. Training Mailbox)

Notes:

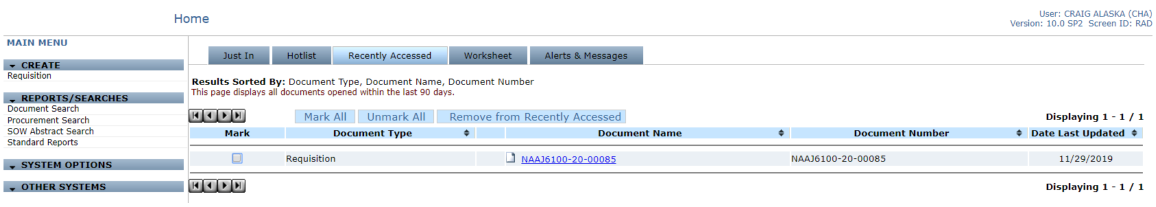
✓ *For training purposes we have our own box to send the requisition.*

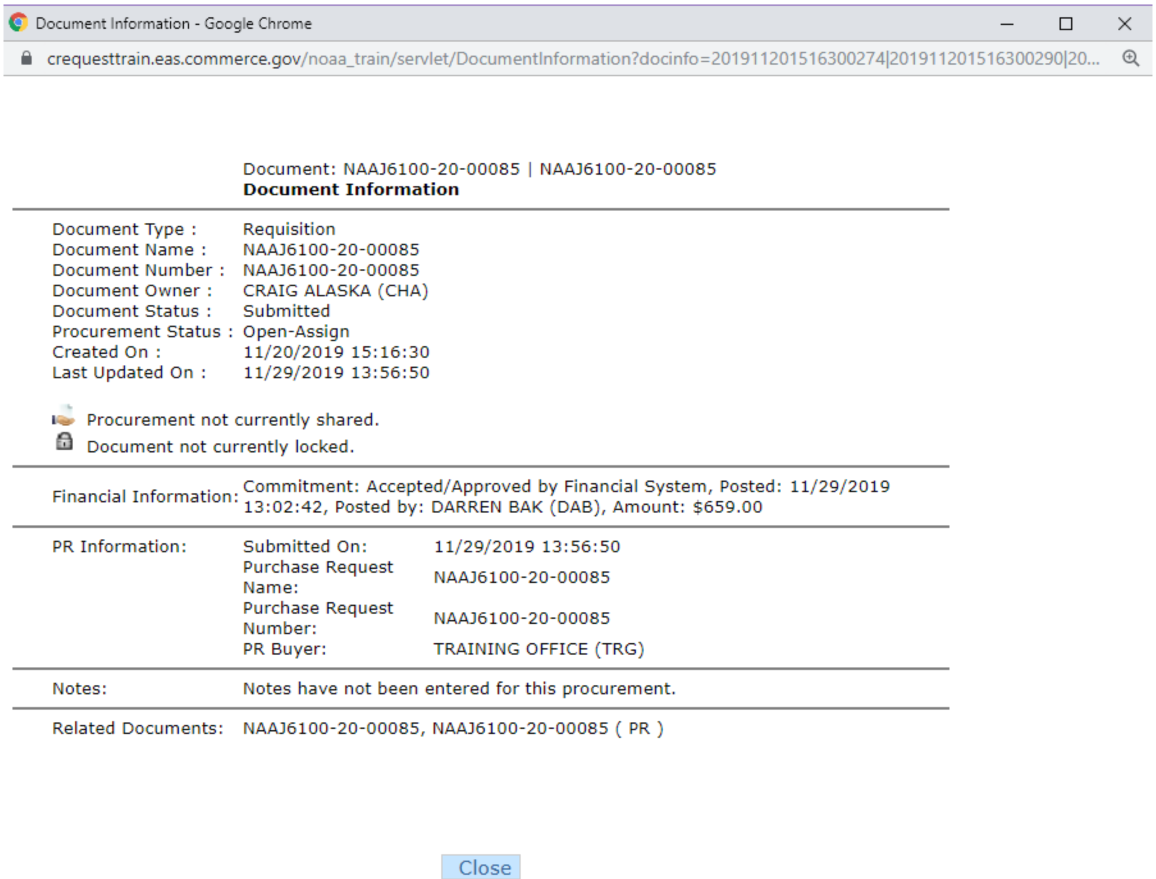
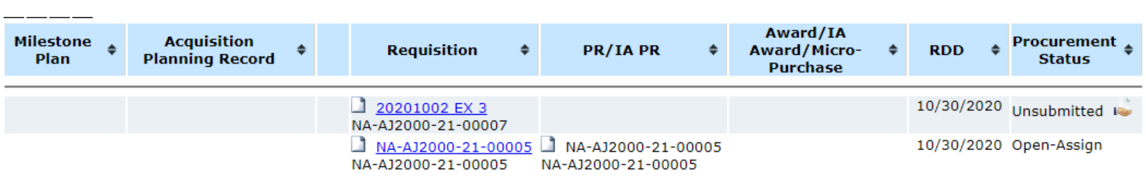
✓ *If you are unable to find the buyer change the Office drop-down selection to ALL and click Search again.*

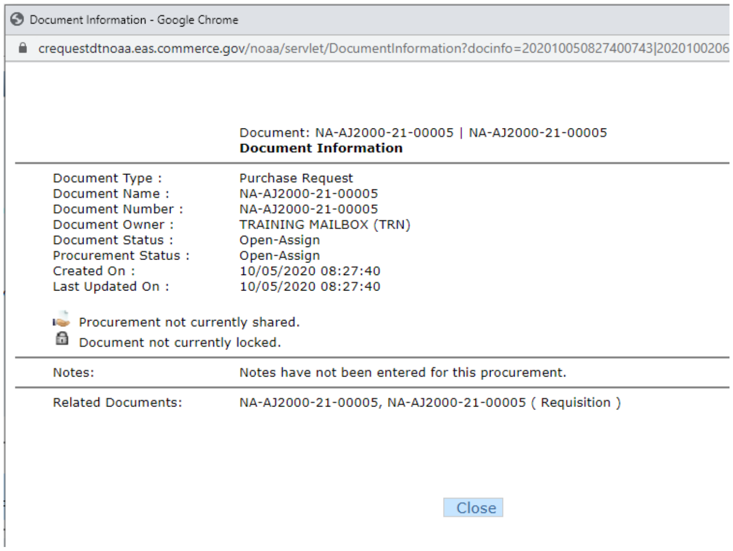
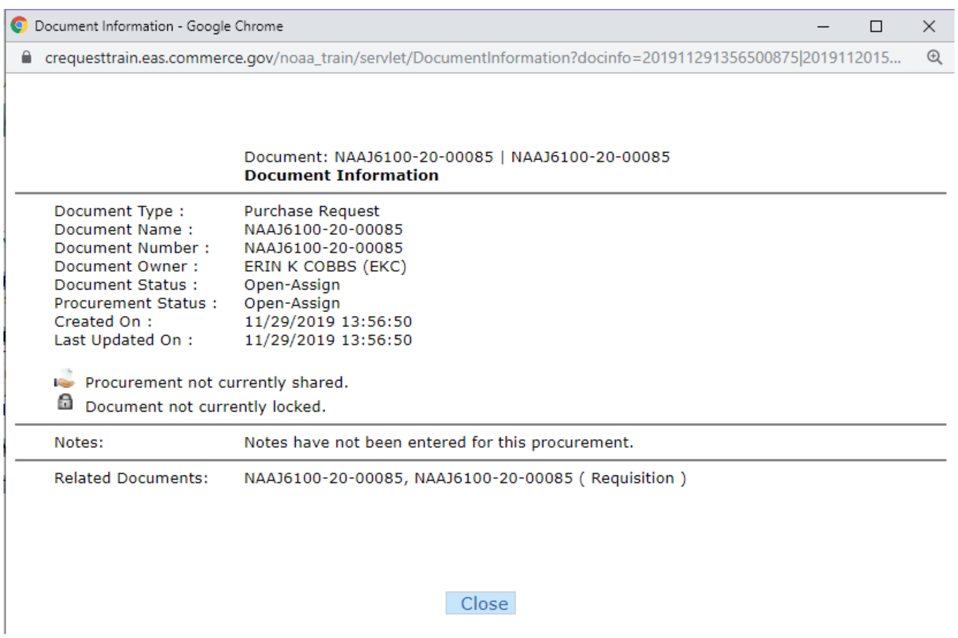
✓ *Most Acquisition Offices have a general box where the requisition will appear in C.Award however, you may be told to send it to a specific person.*

Step	Action
S10	The **Requisition Submit** screen appears with your selection.  ➢ Click ***Save***
S11	The **Requisition Summary** screen appears. At the bottom of the screen in the *Message* area you should get a message that the requisition has been successfully submitted.  ➢ Click ***Review and Approve*** from the *Menu Options*
S12	The **Review Document** screen appears. ➢ Check the ***Approve*** radio button. ➢ Enter your ***Signature Password.*** ➢ Enter any ***Comments.*** ➢ Click ***Save.***
S13	The **User Inbox Management** screen appears and the document is now gone from their inbox. They can now log out of the system or go to another requisition to submit and approve.

INFORMATION FOR REQUISITIONER TO VIEW STATUS

Step	Action
IN1	To view the status of the document once it has been submitted, you can either open the **Hot List** or **Recently Accessed** view tabs.  ➢ Click the ***paper icon***

Step	Action
IN2	A new window will open showing the status of the document as well as where it is in the procurement process.  Document Information - Google Chrome crequesttrain.eas.commerce.gov/noaa_train/servlet/DocumentInformation?docinfo=20191120151630027420191120151630029020... Document: NAAJ6100-20-00085 | NAAJ6100-20-00085 **Document Information** Document Type : Requisition Document Name : NAAJ6100-20-00085 Document Number : NAAJ6100-20-00085 Document Owner : CRAIG ALASKA (CHA) Document Status : Submitted Procurement Status : Open-Assign Created On : 11/20/2019 15:16:30 Last Updated On : 11/29/2019 13:56:50 Procurement not currently shared. Document not currently locked. Financial Information: Commitment: Accepted/Approved by Financial System, Posted: 11/29/2019 13:02:42, Posted by: DARREN BAK (DAB), Amount: $659.00 PR Information: Submitted On: 11/29/2019 13:56:50 Purchase Request Name: NAAJ6100-20-00085 Purchase Request Number: NAAJ6100-20-00085 PR Buyer: TRAINING OFFICE (TRG) Notes: Notes have not been entered for this procurement. Related Documents: NAAJ6100-20-00085, NAAJ6100-20-00085 (PR) Close When finished reviewing the information: ➢ Click ***Close***
IN3	Or from the worksheet tab:  Milestone Plan | Acquisition Planning Record | Requisition | PR/IA PR | Award/IA Award/Micro-Purchase | RDD | Procurement Status 20201002 EX 3 NA-AJ2000-21-00007 | | | 10/30/2020 | Unsubmitted NA-AJ2000-21-00005 NA-AJ2000-21-00005 | NA-AJ2000-21-00005 NA-AJ2000-21-00005 | | 10/30/2020 | Open-Assign Click the paper icon for the Purchase Request, rather than requisition to view the status

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>IN4</td><td>A new window will open showing the status:

</td></tr>
<tr><td>IN5</td><td>Or if it has been assigned to a specific acquisition staff member:

</td></tr>
</table>

Exercise #4: Create a Requisition (Printer)

Objectives:

- Navigate through C.Request
- Create a Requisition
- Follow flow chart

Instructions: Execute the following steps:

Your office is in need of a Laser Jet Printer. You go to GSA Advantage and find the following: HP COLOR LASER JET CP4025N PRINTER under contract (GS-35F-0103N) for $1,366.17.

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] PRINTER) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT*** (i.e. 5 zeros) ➢ Look up the ***UNSPSC*** code and select it (i.e. OFFICE MACHINE) ➢ Enter the ***Purpose*** (i.e. TO PROCURE A COLOR LASER JET PRINTER FOR THE OFFICE) ➢ Enter the ***Contract Number*** (i.e. GS-35F-0103N) ➢ Click on the *Funding* view tab

Step	Action
3b	From the *Funding* view tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Select the ***Agency Identifier*** (i.e. 13) ➢ Select the ***Main Account*** (i.e. 1450) ➢ Click on the *Addresses* view tab
4	From the *Addresses* view tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save***
5	The **Requisition Summary** screen appears: ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ Click ***Line Items*** from the *Menu Options*
6	The **Requisition Line Item Management** screen appears: ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
7	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0001): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. EA) ➢ Enter the ***Cost*** (i.e. 1366.17) ➢ Enter the ***Description*** (i.e. HP COLOR LASER JET CP4025N PRINTER FED-GSA CONTRACT GS-35F-0103N) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
8	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options*
9	The **Account Code Detail** screen appears: ➢ Click the "**Import Entire Account Code**" link
9b	A new window will open. The default will be **Account Table**. Click on the drop-down Search Criteria field and select **Personal Account Codes**. Click ***Search***. All Account Codes entered on your Profile appear here. ➢ Click the *Select* icon for the code you want to select
9c	The fields then will populate with the values from the account code selected. ➢ Change Object Class to **31282535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.1366.17) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save***

Step	Action
10	The **Account Code Management** screen appears with the accounting now listed. ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*
11	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
12	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
13	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

Exercise #5: Create a Requisition (Helium – 2 ACCS codes)

Objectives:

- Navigate through C.Request
- Create a Requisition
- Understand adding more than one accounting code
- Follow flow chart

Instructions: Execute the following steps:

You are purchasing for your office some Liquid Helium that should last the office for 3 months. You'll need 18,200 liters at $5.49 per liter.

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] HELIUM) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab: ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT #*** (i.e. 5 zeros) ➢ Look up the ***UNSPSC*** code and select it (i.e. HELIUM) ➢ Enter the ***Purpose*** (i.e. TO PURCHASE 18,200 LITERS OF LIQUID HELIUM AT $5.49 PER LITER FOR 3 MONTHS) ➢ Enter the ***Vendor*** (i.e. MOTE MARINE LABORATORY, INC) ➢ Click on the *Funding* view tab

Step	Action
3b	From the *Funding* tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Enter the ***Agency Identifier*** (i.e. 13) ➢ Enter the ***Main Account*** (i.e. 1450) ➢ Click on the *Addresses* tab
4	From the *Addresses* tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save***
5	The **Requisition Summary** screen appears: ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ Click ***Line Items*** from the *Menu Options*
6	The **Requisition Line Item Management** screen appears: ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
7	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0001): ➢ Enter the ***Qty*** (i.e. 18200) ➢ Enter the ***UI*** (i.e. LITER) ➢ Enter the ***Cost*** (i.e. 5.49) ➢ Enter the ***Description*** (i.e. LIQUID HELIUM) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* tab From the *Address* tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
8	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options*
9	The **Account Code Detail** screen appears: ➢ Import your Personal Account Code (i.e. 28LEF28) ➢ Change the Object Class to: ***26142535*** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.49959) ➢ Enter ***Quantity*** (i.e. 9100) ➢ Click ***Save***
10	The **Account Code Management** screen appears with the accounting now listed. ➢ Click ***Create*** from the *Menu Options*

Step	Action
11	The **Account Code Detail** screen appears: ➢ Import your Personal Account Code (i.e. 28LEF29) ➢ Change the Object Class to: ***26142535*** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.49959) ➢ Enter ***Quantity*** (i.e. 9100) ➢ Click ***Save***
12	The **Account Code Management** screen appears with the accounting now listed. ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*
13	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear: ➢ Click ***OK***
14	A new window will open showing your requisition form in Adobe (pdf) format. Print or save your document. ➢ Close the window ➢ Click ***Save***
15	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

Exercise #6: Create a Requisition (Chairs and Rounding Issue)

Objectives:

- Navigate through C.Request
- Create Multiple Accountings for a line
- Understand
- Use Rounding Worksheet to figure out multiple accounting costs
- Follow flow chart

Instructions: Execute the following steps:

Your boss has emailed you with the details of the ergonomic chairs needed to be ordered for the office staff. Please use the details in the email to set up your requisition.

Subject: Chair Order

From: Your Boss <yourboss@noaa.gov>

Date: Mon, Current Date 08:10:20 – 0500

To: You <yourname@noaa.gov>

We need 30 new ergonomic chairs. Below are the specs. Use GSA # GS-27F-0024V and the following accounting codes for these purchases.

(30) BIG AND TALL MESH CHAIR WITH MESH SEAT

Brand: Office Star Space Collection

Dimensions: 27"W x 26-1/2"D x 42"H

GS-27F-0024V $393.82/ea

ACCS:

14-21-28LEF28-B00-0001-022116001-3021000200000000-26182535-000000 $5000.25

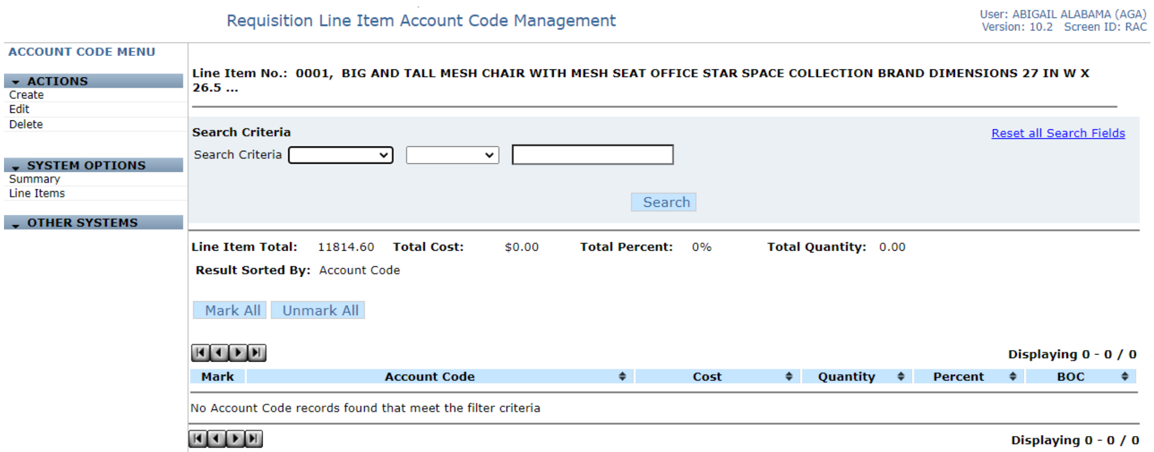
14-21-28LEF29-P00-0001-022116001-3031000200000000-26182517-000000 $1500.10

14-21-28LEF30-P00-0001-022145030-3021000200000000-26182535-000000 $2500.15

14-21-28LEF32-P00-0001-022144002-3031000200000000-26182517-000000 $2814.10

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] CHAIRS) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT #*** (i.e. 5 zeros) ➢ Look up the ***UNSPSC*** code and select it (i.e. CHAIRS) ➢ Enter the ***Purpose*** (i.e. PURCHASE OF ERGONOMIC CHAIRS FOR THE OFFICE) ➢ Enter the ***Contract Number*** (i.e. GS-27F-0024V) ➢ Click on the *Funding* view tab
3b	From the *Funding* view tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Enter the ***Agency Identifier*** (i.e. 13) ➢ Enter the ***Main Account*** (i.e. 1450) ➢ Click on *Addresses* tab
4	From the *Addresses* view tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save*** ➢ Click ***Add to Hotlist*** from the *Menu Options*

Step	Action
5	The **Requisition Summary** screen appears: ➢ Click ***Line Items*** from the *Menu Options.*
6	The **Requisition Line Item Management** screen appears: ➢ Click ***Create CLIN*** from the *Menu Options.*
6a	From the *Administration* view tab (Line 0001): ➢ Enter the ***Qty*** (i.e. 30) ➢ Enter the ***UI*** (i.e. EA) ➢ Enter the ***Cost*** (i.e. 393.82) ➢ Enter a ***Description*** (i.e. BIG AND TALL MESH CHAIR WITH MESH SEAT OFFICE STAR SPACE COLLECTION BRAND DIMENSIONS 27 IN W X 26.5 IN D X 42 IN H, GSA CONTRACT GS-27F-0024V) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* tab From the *Address* tab: ➢ Verify the addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
	Notes: ✓ *You need to Apply here in order to save the line information and provide the ability to add line accounting.* ✓ *If you select save instead of apply, you will need to re-open the line in order to see the Accounting option for the line.*

Step	Action
6b	The **Account Code Management** screen appears. 
6b1	Because there are more than three accounting codes that will need to added to this line and because your boss has asked that it be done by cost, you may end up with what is called a rounding issue. This happens because C.Request only allows for two decimal points in the quantity but CFS requires four. However, CFS does not allow for a 0 quantity. So if the quantity broken out equals something along the lines of 0.0040 it will round to zero, but you must enter at least 0.01 in C.Request in order for it to go through in CFS. So when you add accounting to the line the following must be there: ➢ Line Item Total = Total Cost (accounting) ➢ Total Percentage = 100% ➢ Total Quantity (accounting) = Quantity on Line To make this easier to calculate and easier to enter into C.Request, we have come up with a worksheet that will help.

Step	Action
6b2	The Rounding Worksheet is done in Excel.

	Summary	Line Total	Difference	Fix
Line Item Total	200,000.00	200,000.00	0.00	
Total Quantity	30.00	30.01	-0.01	0.00

Quantity can not be 0 in CFS and Crequest only shows 2 decimal places

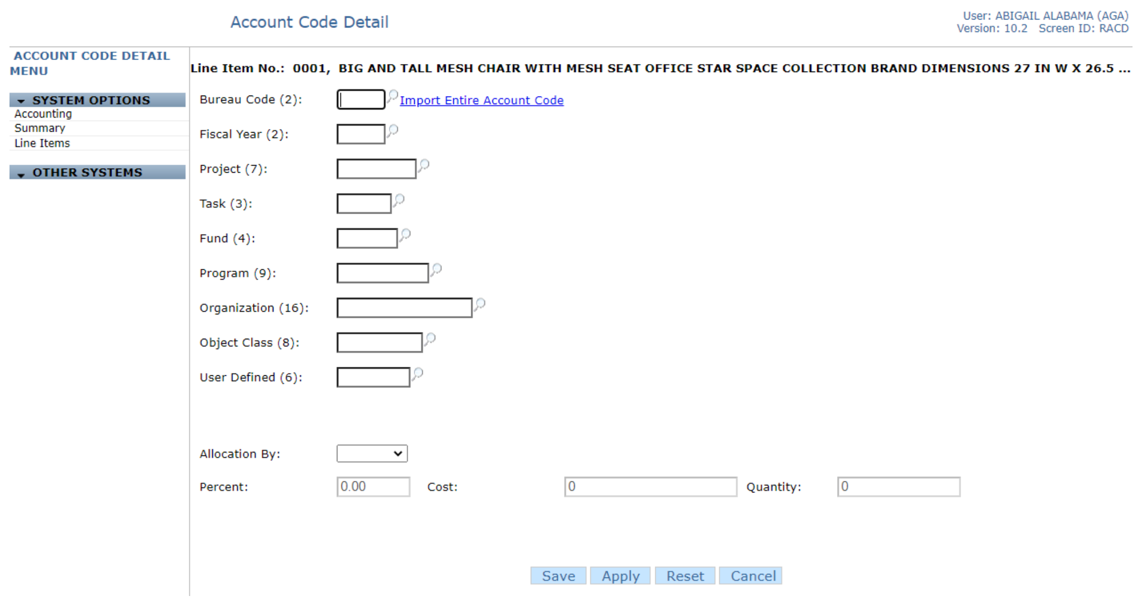
	ACCS	Cost	Quantity	Rounded Qty	Fix	Percent
#1		500.00	0.0750	0.08		0.25%
#2		50.00	0.0090	0.01		0.03%
#3		100,000.00	15.0000	15.00		50.00%
#4		75,000.00	11.2500	11.25		37.50%
#5		24,450.00	3.6690	3.67		12.23%
#6			0.0000	0.00		0.00%
#7			0.0000	0.00		0.00%
#8			0.0000	0.00		0.00%
#9			0.0000	0.00		0.00%
#10			0.0000	0.00		0.00%
#11			0.0000	0.00		0.00%
#12			0.0000	0.00		0.00%
#13			0.0000	0.00		0.00%
#14			0.0000	0.00		0.00%
#15			0.0000	0.00		0.00%
#16			0.0000	0.00		0.00%
#17			0.0000	0.00		0.00%
#18			0.0000	0.00		0.00%
#19			0.0000	0.00		0.00%
#20			0.0000	0.00		0.00%
#21			0.0000	0.00		0.00%
#22			0.0000	0.00		0.00%
#23			0.0000	0.00		0.00%
#24			0.0000	0.00		0.00%
#25			0.0000	0.00		0.00%
#26			0.0000	0.00		0.00%
#27			0.0000	0.00		0.00%
#28			0.0000	0.00		0.00%
#29			0.0000	0.00		0.00%

The colored boxes do all of the calculations for you. Notice there are two columns for quantity. The first is for the CFS side showing the four positions after the decimal point. The second column shows what C.Request does to "round" the quantity to two positions after the decimal point. If any value in the Rounded Qty column has rounded to 0.00 or the subtotal of that column is more than the line quantity, you will need to use the FIX column to fix the quantities to make sure they equal the line quantity. Any column that is white is a fillable field and will allow you to enter data.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6b21</td><td>
For this exercise there are 4 accounting codes to add. Enter these accounting codes into the worksheet first:
<table>
<tr><td></td><td></td><td>Summary</td><td>Line Total</td><td>Difference</td><td>Fix</td><td></td></tr>
<tr><td></td><td>Line Item Total</td><td>11,814.60</td><td>11,814.60</td><td>0.00</td><td></td><td></td></tr>
<tr><td></td><td>Total Quantity</td><td>30.00</td><td>30.01</td><td>-0.01</td><td>0.00</td><td></td></tr>
<tr><td colspan="7">Quantity can not be 0 in CFS and Crequest only shows 2 decimal places</td></tr>
<tr><td></td><td>ACCS</td><td>Cost</td><td>Quantity</td><td>Rounded Qty</td><td>Fix</td><td>Percent</td></tr>
<tr><td>#1</td><td></td><td>5,000.25</td><td>12.6960</td><td>12.70</td><td></td><td>42.32%</td></tr>
<tr><td>#2</td><td></td><td>1,500.10</td><td>3.8100</td><td>3.81</td><td></td><td>12.70%</td></tr>
<tr><td>#3</td><td></td><td>2,500.15</td><td>6.3480</td><td>6.35</td><td></td><td>21.16%</td></tr>
<tr><td>#4</td><td></td><td>2,814.10</td><td>7.1460</td><td>7.15</td><td></td><td>23.82%</td></tr>
</table>
The worksheet automatically calculates the quantity and percentage to be added to C.Request. In the subtotal and total areas, you will see if there are any differences that need to be corrected.
Any changes to the quantity should be done in the FIX column and if that is the case, you will need to make sure to enter that column’s quantity into C.Request.
Once you are finished, print this worksheet for easy entry into C.Request.
</td></tr>
<tr><td>6c</td><td>
Return to C.Request from the Account Code Management screen:
➢ Click Create from the Menu Options.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6c1</td><td>

The **Account Code Detail** screen appears.



- ➢ Enter all values of the first ACCS (e.g., bureau, fund, etc.) from your worksheet
- ✓ *14-21-28LEF28-B00-0001-022116001-30210002000000000-26252535-000000*
- ➢ Select ***Allocation By*** (i.e. Cost)
- ➢ Enter the ***Cost*** (i.e. 5000.25)
- ➢ Enter the ***Quantity*** (i.e. 12.69)
- ➢ Click ***Save***

</td></tr>
<tr><td>6c2</td><td>

- ➢ Click ***Create*** from the *Menu Options.*
- ➢ Enter all values of the ACCS (e.g., bureau, fund, etc.).
- ✓ *14-21-28LEF29-P00-0001-022116001-30310002000000000-26252535-000000*
- ➢ Select ***Allocation By*** (i.e. Cost)
- ➢ Enter the ***Cost*** (i.e. 1500.10)
- ➢ Enter the ***Quantity*** (i.e. 3.81)
- ➢ Click ***Save***

</td></tr>
</table>

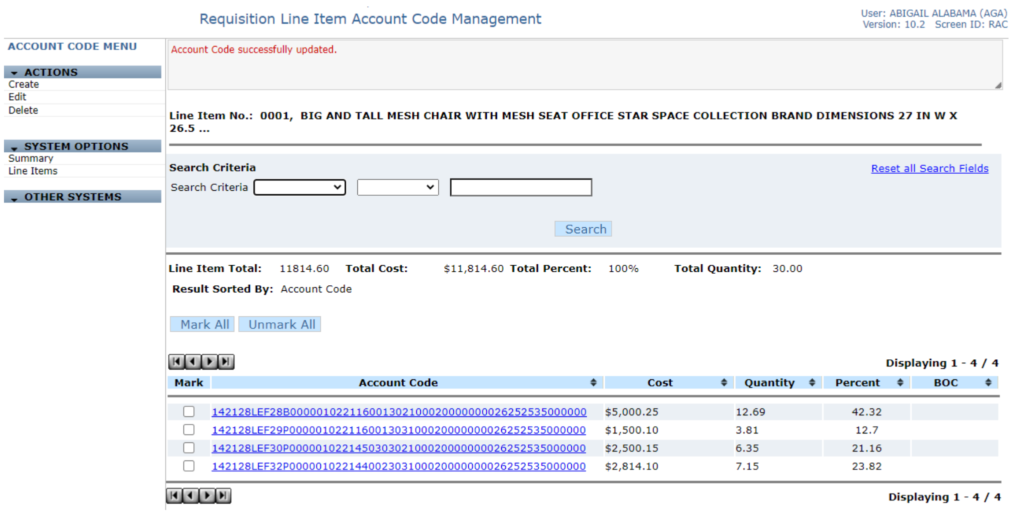
Step	Action
6c3	➢ Click ***Create*** from the *Menu Options.* ➢ Enter all values of the ACCS (e.g., bureau, fund, etc.). ✓ *14-21-28LEF30-P00-0001-022145030-3021000200000000-26182535-000000* ✓ Select ***Allocation By*** (i.e. Cost) ➢ Enter the ***Cost*** (i.e. 2500.15) ➢ Enter the ***Quantity*** (i.e. 6.35) ➢ Click ***Save***
6c4	➢ Click ***Create*** from the *Menu Options.* ➢ Enter all values of the ACCS (e.g., bureau, fund, etc.). ✓ *14-21-28LEF32-P00-0001-022144002-3031000200000000-26182535-000000* ✓ Select ***Allocation By*** (i.e. Cost) ➢ Enter the ***Cost*** (i.e. 2814.10) ➢ Enter the ***Quantity*** (i.e. 7.15) ➢ Click ***Save***

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6d</td><td>

➢ Verify the Line Item Total equals Total Cost

➢ Verify the Total Percentage equals 100%

➢ Verify the Total Quantity equal the total line item quantity



</td></tr>
<tr><td>7</td><td>

➢ If you are finished, click ***Summary*** from the *Menu Options*

➢ Click ***Forms*** from the *Menu Options*

</td></tr>
<tr><td>8</td><td>

The **Requisition Form Setup** screen appears:

➢ Click the ***Accounting Codes*** checkbox

➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox

➢ Click the ***Delivery Date*** checkbox

➢ Click ***View Form***

A warning message will appear:

➢ Click ***OK***

</td></tr>
<tr><td>9</td><td>

A new window opens showing your requisition form in Adobe (pdf) format. Print or save your document.

➢ Close the window

➢ Click ***Save***

</td></tr>
</table>

Step	Action
10	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

Exercise #7: Create a Requisition (SEACAT - Multiple Lines)

Objectives:

- Navigate through C.Request
- Create Multiple Lines
- Follow flow chart

Instructions: Execute the following steps:

You will need to create a requisition that has multiple lines per a quote about a SEACAT profiler that needs to be confirmed and recertified.

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] SEACAT) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT #*** (i.e. 5 zeros) ➢ Look up the ***UNSPSC*** code and select it (i.e. EQUIPMENT INSPECTION) ➢ Enter the ***Purpose*** (i.e. CONFIRM AND RECERTIFY SBE 19 CALIBRATE CONDUCTIVITY TEMPERATURE AND PRESSURE NOAA SHIP) ➢ Enter the ***Vendor*** (i.e. SEABIRD) ➢ Click on the *Funding* view tab

Step	Action
3b	From the *Funding* view tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Select the ***Agency Identifier*** (i.e. 13) ➢ Select the ***Main Account*** (i.e. 1450) ➢ Click on the *Addresses* view tab
4	From the *Addresses* view tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save***
5	The **Requisition Summary** screen appears: ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ Click ***Line Items*** from the *Menu Options*
6	The **Requisition Line Item Management** screen appears: ➢ Click ***Create CLIN*** from the *Menu Options*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>The Requisition Line Item Detail screen appears:
From the Administration view tab (Line 0001):
➢ Enter the Qty (i.e. 5)
➢ Enter the UI (i.e. EA)
➢ Enter the Cost (i.e. 170)
➢ Enter the Description (i.e. CONFIRM/RECERTIFY SBE28)
➢ Enter the Receiving Office Number (i.e. copy an Address Code)
➢ Click on the Address view tab
From the Address view tab:
➢ Verify addresses are correct
➢ Click Apply
➢ Click Accounting from the Menu Options</td></tr>
<tr><td>8</td><td>The Account Code Management screen appears:
➢ Click Create from the Menu Options
➢ Click the “Import Entire Account Code” link
➢ Select a Personal Account Code
➢ Change Object Class to 25272535
➢ Select Allocation By (i.e. Cost)
➢ Enter Cost (i.e.850.00)
➢ Enter Quantity (i.e.5)
➢ Click Save
➢ Click Create CLIN from the Menu Options</td></tr>
</table>

Step	Action
9	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0002): ➢ Enter the ***Qty*** (i.e. 5) ➢ Enter the ***UI*** (i.e. EA) ➢ Enter the ***Cost*** (i.e. 495) ➢ Enter the ***Description*** (i.e. CALIBRATE CONDUCTIVITY/PRESSURE) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
10	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **25272535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.2475.00) ➢ Enter ***Quantity*** (i.e.5) ➢ Click ***Save*** ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
11	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0003): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. LO) ➢ Enter the ***Cost*** (i.e. 4410) ➢ Enter the ***Description*** (i.e. CONFIRM/RECERTIFY SBE EQUIP PER QUOTE) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
12	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **25272535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.4410.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
13	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0004): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. LO) ➢ Enter the ***Cost*** (i.e. 5275) ➢ Enter the ***Description*** (i.e. CONFIRM/RECERTIFY SBE EQUIP PER QUOTE) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
14	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **25272535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.5275.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
15	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0005): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. JB) ➢ Enter the ***Cost*** (i.e. 5485) ➢ Enter the ***Description*** (i.e. CONFIRM/RECERTIFY SBE EQUIP PER QUOTE) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
16	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **25272535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.5485.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
17	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0006): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. JB) ➢ Enter the ***Cost*** (i.e. 793) ➢ Enter the ***Description*** (i.e. CONFIRM/RECERTIFY 11/11PLUS; PERFORM MINOR REPAIRS - SEE QUOTE) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
18	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **25272535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.793.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*

Step	Action
19	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
20	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
21	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

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Exercise #8: Create a Requisition (Cell Phone - Multiple Lines)

Objectives:

- Navigate through C.Request
- Create Multiple Lines
- Follow flow chart

Instructions: Execute the following steps:

You will need to create a requisition that has multiple lines per a quote about a cell phone service.

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] CELLPHONE) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT #*** (i.e. 5 zeros) ➢ Look up the ***UNSPSC*** code and select it (i.e. PHONE) ➢ Enter the ***Purpose*** (i.e. TO PROCURE CELL PHONE SERVICE FOR EMPLOYEE JOE SMITH) ➢ Enter the ***Vendor*** (i.e. SPRINT) ➢ Click on the *Funding* view tab

Step	Action
3b	From the *Funding* view tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Select the ***Agency Identifier*** (i.e. 13) ➢ Select the ***Main Account*** (i.e. 1450) ➢ Click on the *Addresses* view tab
4	From the *Addresses* view tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save***
5	The **Requisition Summary** screen appears: ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ Click ***Line Items*** from the *Menu Options*
6	The **Requisition Line Item Management** screen appears: ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
7	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0001): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. EA) ➢ Enter the ***Cost*** (i.e. 720) ➢ Enter the ***Description*** (i.e. CELL PHONE SERVICE $60/MO FOR YEAR STARTING ON DATES LISTED IN SOW) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
8	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **23382535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.720.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Create CLIN*** from the *Menu Options*

Step	Action
9	The **Requisition Line Item Detail** screen appears: From the *Administration* view tab (Line 0002): ➢ Enter the ***Qty*** (i.e. 1) ➢ Enter the ***UI*** (i.e. EA) ➢ Enter the ***Cost*** (i.e. 200) ➢ Enter the ***Description*** (i.e. OVERAGE COSTS) ➢ Enter the ***Receiving Office Number*** (i.e. copy an Address Code) ➢ Click on the *Address* view tab From the *Address* view tab: ➢ Verify addresses are correct ➢ Click ***Apply*** ➢ Click ***Accounting*** from the *Menu Options*
10	The **Account Code Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link ➢ Select a Personal Account Code ➢ Change Object Class to **23382535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.200.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save*** ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*

Step	Action
11	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
12	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
13	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

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Exercise #9: Create a Requisition – Simple Contract with Option Period

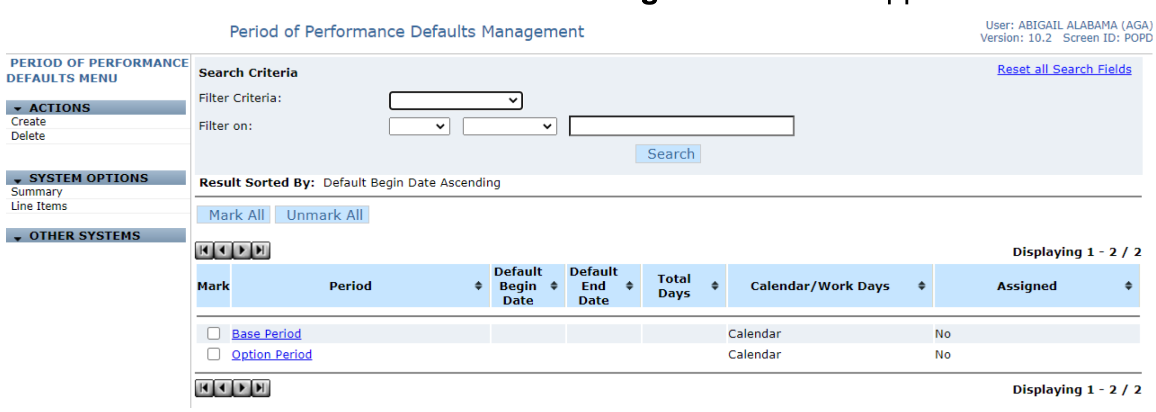
Objectives:

- Navigate through C.Request
- Create a Requisition for a Simple Contract with option period
- Use the Option View Tab
- Follow flow chart

Instructions: Execute the following steps:

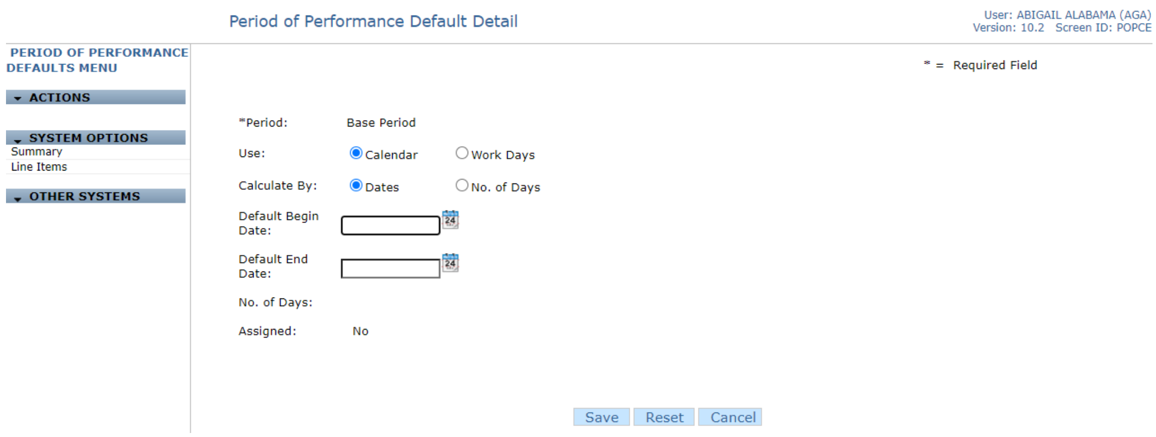
Your office needs janitorial services for various locations. You'll need to create a requisition for the first year and add an option year.

Step	Action
1	From the **Home** screen: ➢ Click ***Create Requisition*** from the *Menu Options*
2	The **Requisition PIIN and Name** screen appears: ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] JANITOR SVCS) ➢ Click ***Save***
3a	The **Requisition Administration** screen appears. From the *Administration* view tab ➢ Enter the ***Delivery Date*** (i.e. MM/DD/YYYY) ➢ Enter the ***COR*** (i.e. EKC – make sure to use the refresh icon if typing) ➢ Choose the ***FCOT #*** (i.e. JANITOR/CLEANING) ➢ Look up the ***UNSPSC*** code and select it (i.e. JANITOR) ➢ Enter the ***Purpose*** (i.e. TO PROCURE JANITOR SERVICES) ➢ Click on the *Funding* view tab

Step	Action
3b	From the *Funding* view tab: ➢ Enter the ***Certifies bonafide need*** field (i.e. TRAINING ID name) ➢ Enter the ***Certifies funds available*** field (i.e. DAB) ➢ Select the ***Agency Identifier*** (i.e. 13) ➢ Select the ***Main Account*** (i.e. 1450) ➢ Click on the *Addresses* view tab
4	From the *Addresses* view tab: ➢ Enter or verify all applicable addresses including ***Supplemental Address Information*** ➢ Click ***Save***
5	The **Requisition Summary** screen appears: ➢ Click ***Add to Hotlist*** from the *Menu Options* ➢ Click ***Period of Performance Defaults*** from the *Menu Options*
6	The **Period of Performance Defaults Management** screen appears:  ➢ Click ***Base Period*** (Use the system generated one)
	Notes: ✓ *The system generated Base Period is the only one that the system recognizes as an actual base period.* ✓ *Anything else created the system will only recognize as an option period.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

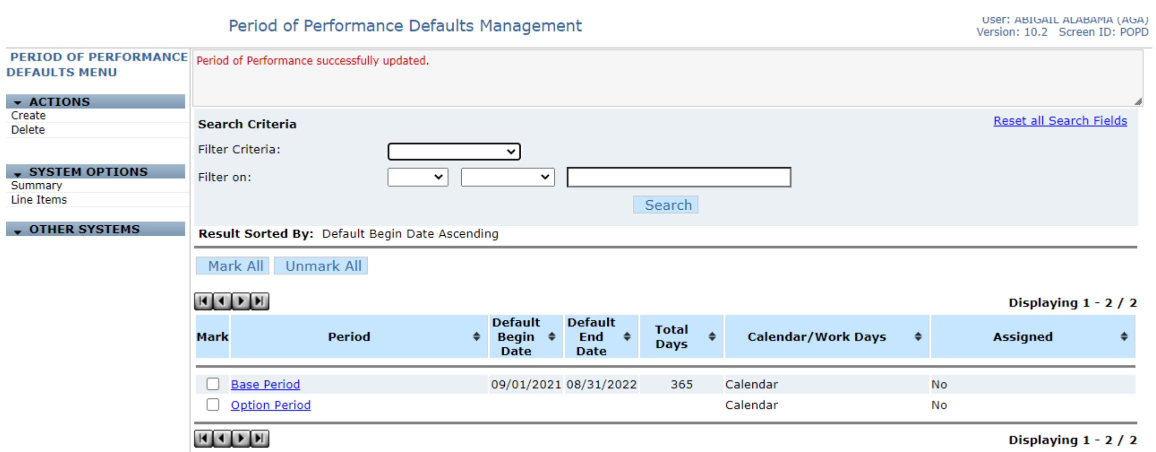
The **Period of Performance Default Detail** screen appears:



- Choose ***Use*** (i.e. Calendar)
- Choose ***Calculate By*** (i.e. Dates)
- Enter the ***Default Begin Date***
- Enter the ***Default End Date***
- Click ***Save***

</td></tr>
<tr><td>8</td><td>

The **Period of Performance Default Detail** screen appears with your new period listed:



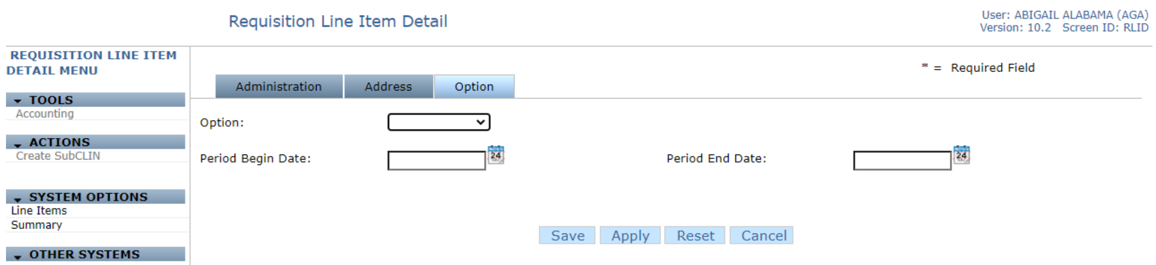
- Edit Option Period dates like you did with the Base Period dates

</td></tr>
</table>

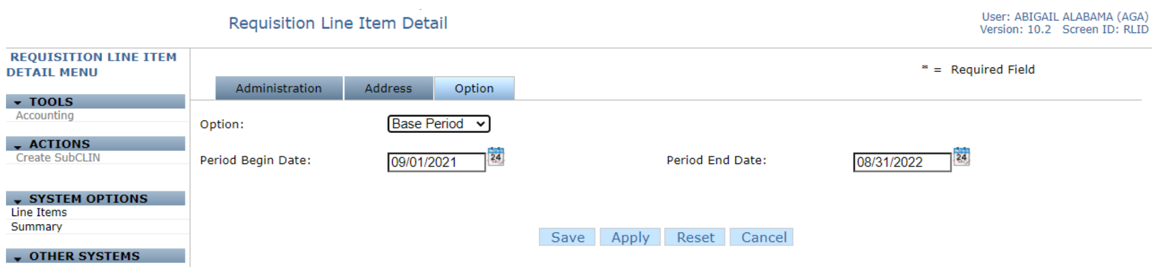
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
The Period of Performance Default Detail screen appears with your new period listed:
<table>
<tr><th>Mark</th><th>Period</th><th>Default Begin Date</th><th>Default End Date</th><th>Total Days</th><th>Calendar/Work Days</th><th>Assigned</th></tr>
<tr><td>☐</td><td>Base Period</td><td>09/01/2021</td><td>08/31/2022</td><td>365</td><td>Calendar</td><td>No</td></tr>
<tr><td>☐</td><td>Option Period</td><td>09/01/2022</td><td>08/31/2023</td><td>365</td><td>Calendar</td><td>No</td></tr>
</table>
If you need additional options, you can create them.
When finished adding your Period of Performances:
➢ Click Line Items from the Menu Options
</td></tr>
<tr><td>10</td><td>
The Requisition Line Item Detail screen appears:
From the Administration view tab (Line 0001):
➢ Enter the Qty (i.e. 12)
➢ Enter the UI (i.e. MONTHS)
➢ Enter the Cost (i.e. 1800)
➢ Enter the Description (i.e. BASE YEAR JANITORIAL SVCS NON-PERSONAL TO FURNISH ALL LABOR, MATERIALS AND EQUIPMENT NECESSARY TO PERFORM SERVICES IN ACCORDANCE WITH SOW ATTACHED)
➢ Enter the Receiving Office Number (i.e. copy an Address Code)
➢ Click on the Address view tab
From the Address view tab:
➢ Verify addresses are correct
➢ Click Apply
➢ Click the Option tab
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>

From the *Option* view tab (Line 0001):



- Choose the ***Option*** (i.e. Base Period) – Dates will automatically fill in from what you had from the Period of Performance



- Click ***Apply***
- Click ***Accounting*** from the *Menu Options*

</td></tr>
<tr><td>12</td><td>

The **Account Code Management** screen appears:

- Click ***Create*** from the *Menu Options*
- Click the "**Import Entire Account Code**" link
- Select a Personal Account Code
- Change Object Class to **25272535**
- Select ***Allocation By*** (i.e. Cost)
- Enter ***Cost*** (i.e.21600.00)
- Enter ***Quantity*** (i.e.12)
- Click ***Save***
- Click ***Create CLIN*** from the *Menu Options*

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>The Requisition Line Item Detail screen appears:
From the Administration view tab (Line 0002):
➢ Enter the Qty (i.e. 12)
➢ Enter the UI (i.e. MONTHS)
➢ Enter the Cost (i.e. 1800)
➢ Enter the Description (i.e. OPTION YEAR 1 - JANITOR SERVICES – SPECS IN ATTACHED SUPPORT DOC)
➢ Enter the Receiving Office Number (i.e. copy an Address Code)
➢ Click on the Address view tab
From the Address view tab:
➢ Verify addresses are correct
➢ Click Apply
➢ Click the Option tab</td></tr>
<tr><td>14</td><td>From the Option view tab (Line 0002):
➢ Choose the Option (i.e. Option Period) – Dates will automatically fill in from what you had from the Period of Performance
➢ Click Apply
➢ Click Summary from the Menu Options
➢ Click Forms from the Menu Options</td></tr>
<tr><td></td><td>Notes:
✓ Option periods do not have any accounting associated to them</td></tr>
<tr><td>15</td><td>The Requisition Form Setup screen appears:
➢ Click the Accounting Codes checkbox
➢ Click the Cost of Line Item Applied to the Account Code checkbox
➢ Click the Delivery Date checkbox
➢ Click View Form
A warning message will appear.
➢ Click OK</td></tr>
</table>

Step	Action
16	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
17	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

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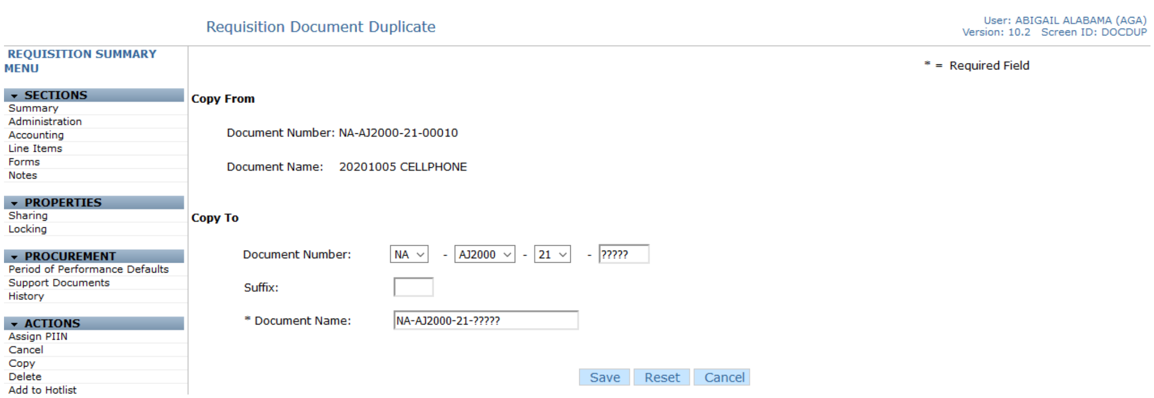
Exercise #10: Create a Modification Requisition (Change ACCS – Add New Line)

Objectives:

- Navigate through C.Request
- Create a modification requisition
- Understand how to change ACCS for an award modification
- Understand how to add an additional line
- Follow flow chart

Instructions: Execute the following steps:

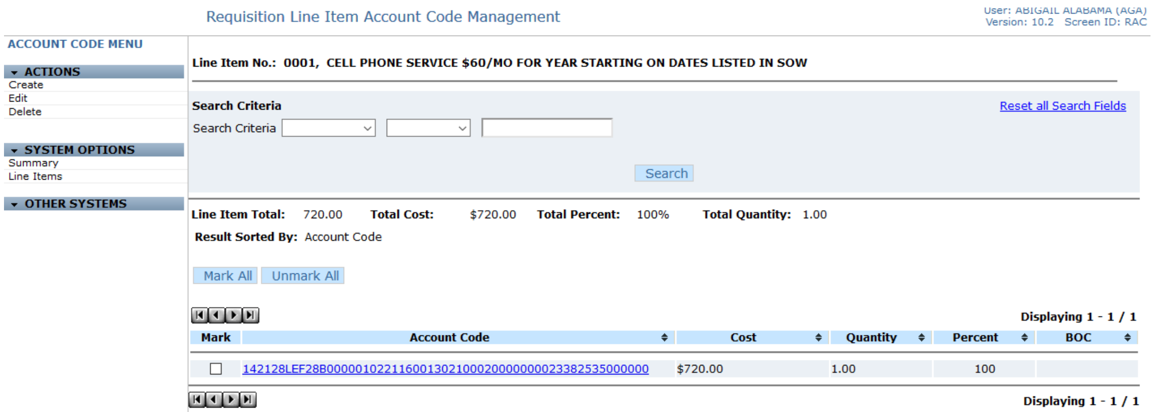
After the requisition was sent over and awarded, you find out that your office wants to add a new additional line to the award and change the accounting for the two existing lines.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Locate the requisition through Hotlist, Recently Access, and/or Worksheet tab. Open the document. For training purposes, you’re going to look for your Exercise 8 – Cell phone.</td></tr>
<tr><td>2</td><td>From the Requisition Summary screen do the following:
➢ Click Copy from the Menu Options.</td></tr>
<tr><td>3</td><td>The Requisition Document Duplicate screen appears.


➢ Choose Document Number from the PICKLIST</td></tr>
</table>

Step	Action
	➢ Change the ***Document Name*** if you wish (i.e. [date] MOD TO CELL PHONE) ➢ Click ***Save***
4	The **Requisition Administration** screen appears. Make any changes that are needed on this screen. When finished do the following: ➢ Validate all fields and make changes where necessary (i.e. Delivery Date) ➢ Enter the ***Purpose***. (i.e. MODIFICATION TO AWARD # TO CHANGE ACCOUNTING FOR LINES 1-2 AND ADD NEW LINE 3) ➢ Click ***Save*** ➢ Add to ***Hotlist*** ➢ Click ***Line Items*** from the *Menu Options*
	Notes: ✓ *Depending upon when the modification is taking place, other fields may need to be updated like dates and codes.* ✓ *In production, if you know the award number, enter it on the contract number field.*
5	The **Requisition Line Item Management** screen appears: ➢ Click ***0001*** from the Line Items to edit it
6	The **Requisition Line Item Detail** screen appears. ➢ Change ***Modification LI Action*** to ***Change Award Line Item*** Modification LI Action: Change Award Line Item ▼ ➢ Click ***Apply*** ➢ Click on ***Accounting***

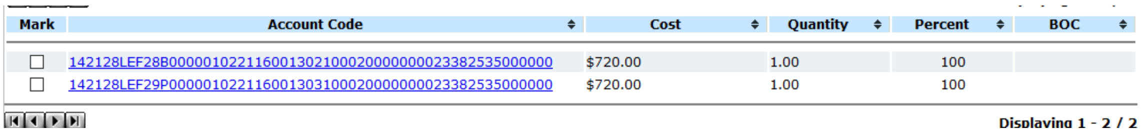
Step	Action
7a	The **Requisition Line Item Account Code Management** screen appears:



- Take note of the current accounting especially the object class code
- Click ***Create*** from the *Menu Options*
- Click the "**Import Entire Account Code**" link (i.e. use the "new" code)
- Select a Personal Account Code
- Change Object Class to **23382535**
- Select ***Allocation By*** (i.e. Cost)
- Enter ***Cost*** (i.e.720.00)
- Enter ***Quantity*** (i.e.1)
- Click ***Save***

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7b</td><td>

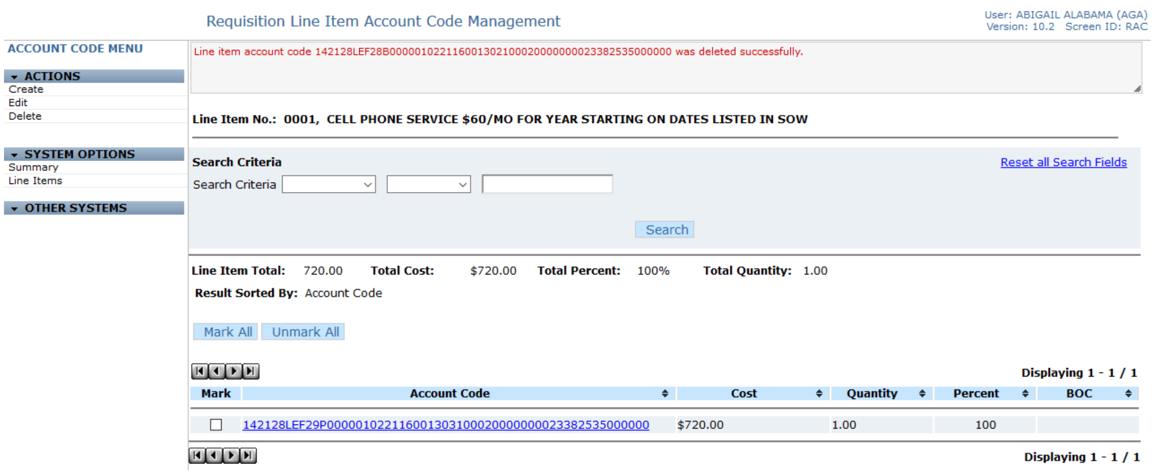
The **Requisition Line Item Account Code Management** screen appears:



Both codes are now on the line. It's time to make sure the correct information is there before doing the following steps:

- Write/copy the original code
- Check the box before the original code
- Click ***Delete*** from the *Menu Options*
- Click ***OK*** from the pop-up

The screen will come back with only one accounting and a message stating the other accounting has been deleted successfully.



- Click ***Line Items*** from the *Menu Options*

</td></tr>
</table>

Step	Action
8a	The **Requisition Line Item Management** screen appears: ➢ Click ***0002*** from the Line Items to edit it ➢ Change ***Modification LI Action*** to ***Change Award Line Item*** ➢ Click ***Apply*** ➢ Click on ***Accounting*** ➢ Take note of the current accounting especially the object class code ➢ Click ***Create*** from the *Menu Options* ➢ Click the "**Import Entire Account Code**" link (i.e. use the "new" code) ➢ Select a Personal Account Code ➢ Change Object Class to **23382535** ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter ***Cost*** (i.e.200.00) ➢ Enter ***Quantity*** (i.e.1) ➢ Click ***Save***
8b	The **Requisition Line Item Account Code Management** screen appears with both codes showing. It's time to make sure the correct information is there before doing the following steps: ➢ Write/copy the original code ➢ Check the box before the original code ➢ Click ***Delete*** from the *Menu Options* ➢ Click ***OK*** from the pop-up The screen will come back with only one accounting and a message stating the other accounting has been deleted successfully. ➢ Click ***Line Items*** from the *Menu Options*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td rowspan="2">9</td><td>The Requisition Line Item Detail screen appears:
From the Administration view tab (Line 0001):
➢ Enter the Qty (i.e. 1)
➢ Enter the UI (i.e. EA)
➢ Enter the Cost (i.e. 338.00)
➢ Enter the Description (i.e. CELL PHONE)
➢ Enter the Receiving Office Number (i.e. copy an Address Code)
➢ Click on the Address view tab
From the Address view tab:
➢ Verify addresses are correct
➢ Click Apply
➢ Click Accounting from the Menu Options</td></tr>
<tr><td>Notes:
✓ On a new line being added to an Award you leave the Modification LI Action blank.</td></tr>
<tr><td>10</td><td>➢ Click Create from the Menu Options
➢ Click the “Import Entire Account Code” link (i.e. use the “new” code)
➢ Select a Personal Account Code
➢ Change Object Class to 23382535
➢ Select Allocation By (i.e. Cost)
➢ Enter Cost (i.e.338.00)
➢ Enter Quantity (i.e.1)
➢ Click Save
➢ Click Summary from the Menu Options
➢ Click Accounting from the Menu Options</td></tr>
</table>

Step	Action
11	The **Account Code Summary Management** screen appears: ➢ Click ***Create*** from the *Menu Options* ➢ Enter the ACCS code that was used on the original award ➢ Uncheck the Default checkbox ➢ Enter the Default percentage to **100%** ➢ Click ***Save*** ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*
12	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
13	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
14	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

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Exercise #11: Create a Modification Requisition (Cancel Lines on an Award)

Objectives:

- Navigate through C.Request
- Create a modification requisition
- Understand how to cancel lines for an award modification
- Follow flow chart

Instructions: Execute the following steps:

An Award was issued for servicing of a SEACAT.

Step	Action
1	Locate the requisition through Hotlist, Recently Access, and/or Worksheet tab. Open the document. For training purposes, you're going to look for your Exercise 7 – SEACAT.
2	From the **Requisition Summary** screen do the following: ➢ Click ***Copy*** from the *Menu Options.*
3	The **Requisition Document *Duplicate*** screen appears. ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] MOD TO SEACAT) ➢ Click ***Save***
4	The **Requisition Administration** screen appears. Make any changes that are needed on this screen. When finished do the following: ➢ Validate all fields and make changes where necessary (i.e. Delivery Date) ➢ Enter the ***Purpose***. (i.e. UPDATING AWARD TO CANCEL LINES 5 & 6. LINE 5 TO USE AGAIN ON ANOTHER AWARD. LINE 6 TOTALLY CANCELLING NOT USING AGAIN) ➢ Click ***Save*** ➢ Add to ***Hotlist*** ➢ Click ***Line Items*** from the *Menu Options*

Step	Action
	Notes: ✓ *Depending upon when the modification is taking place, other fields may need to be updated like dates and codes.* ✓ *In production, if you know the award number, enter it on the contract number field.*

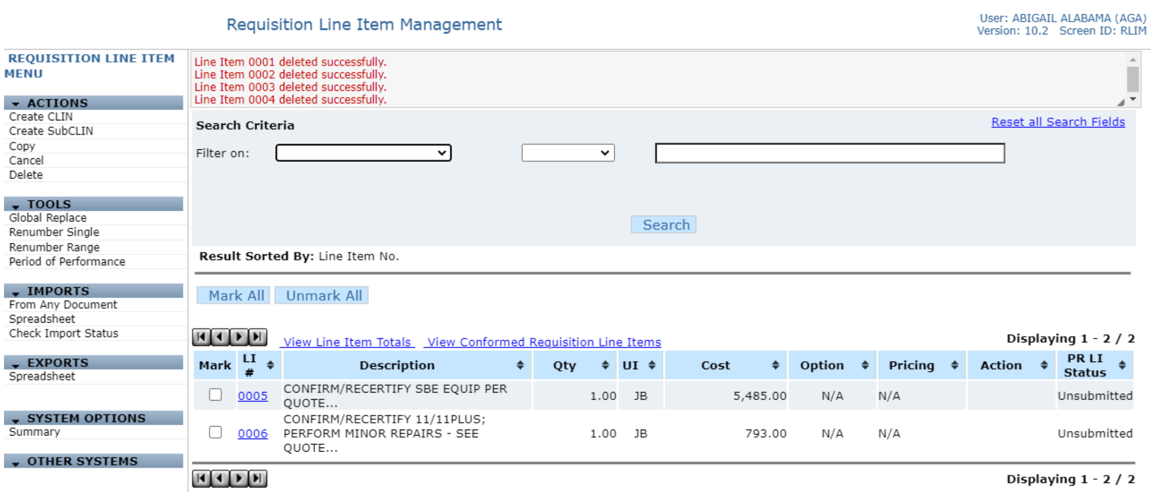
Step 5

The **Requisition Line Item Management** screen appears:

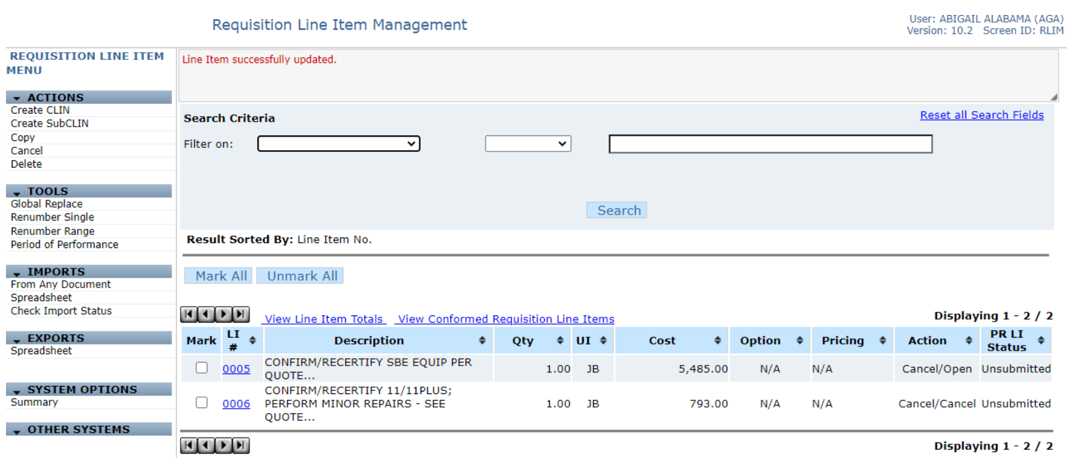
Mark	LI #	Description	Qty	UI	Cost	Option	Pricing	Action	PR LI Status
☐	0001	CONFIRM/RECERTIFY SBE28...	5.00	EA	170.00	N/A	N/A		Unsubmitted
☐	0002	CALIBRATE CONDUCTIVITY/PRESSURE...	5.00	EA	495.00	N/A	N/A		Unsubmitted
☐	0003	CONFIRM/RECERTIFY SBE EQUIP PER QUOTE...	1.00	LO	4,410.00	N/A	N/A		Unsubmitted
☐	0004	CONFIRM/RECERTIFY SBE EQUIP PER QUOTE...	1.00	LO	5,275.00	N/A	N/A		Unsubmitted
☐	0005	CONFIRM/RECERTIFY SBE EQUIP PER QUOTE...	1.00	JB	5,485.00	N/A	N/A		Unsubmitted
☐	0006	CONFIRM/RECERTIFY 11/11PLUS; PERFORM MINOR REPAIRS - SEE QUOTE...	1.00	JB	793.00	N/A	N/A		Unsubmitted

- Check the boxes for Lines 1-4
- Click ***Delete*** from the *Menu Options*
- Click ***OK*** from the pop-up

The screen will come back with lines 5 and 6 and a message stating the other line has been deleted successfully.



- Click ***0005*** from the Line Items to edit it

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The Requisition Line Item Detail screen appears.
➢ Change Modification LI Action to Cancel/Open Award Line Item
Modification LI Action: Cancel/Open Award Line Item ▼
➢ Click Save</td></tr>
<tr><td>7</td><td>The Requisition Line Item Management screen appears:
➢ Click 0006 from the Line Items to edit it</td></tr>
<tr><td>8</td><td>The Requisition Line Item Detail screen appears.
➢ Change Modification LI Action to Cancel/Cancel Award Line Item
Modification LI Action: Cancel/Cancel Award Line Item ▼
➢ Click Save</td></tr>
<tr><td></td><td>Notes:
✓ The Cancel/Open option will cancel it from the award, but leave it open to be put on another one.
✓ The Cancel/Cancel option will cancel it from the award and de-obligate the money.</td></tr>
<tr><td>9</td><td>The Requisition Line Item Management screen appears:

➢ Click Summary from the Menu Options
➢ Click Forms from the Menu Options</td></tr>
</table>

Step	Action
10	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
11	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
12	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

Exercise #12: Create a Modification Requisition – Exercising Option Period

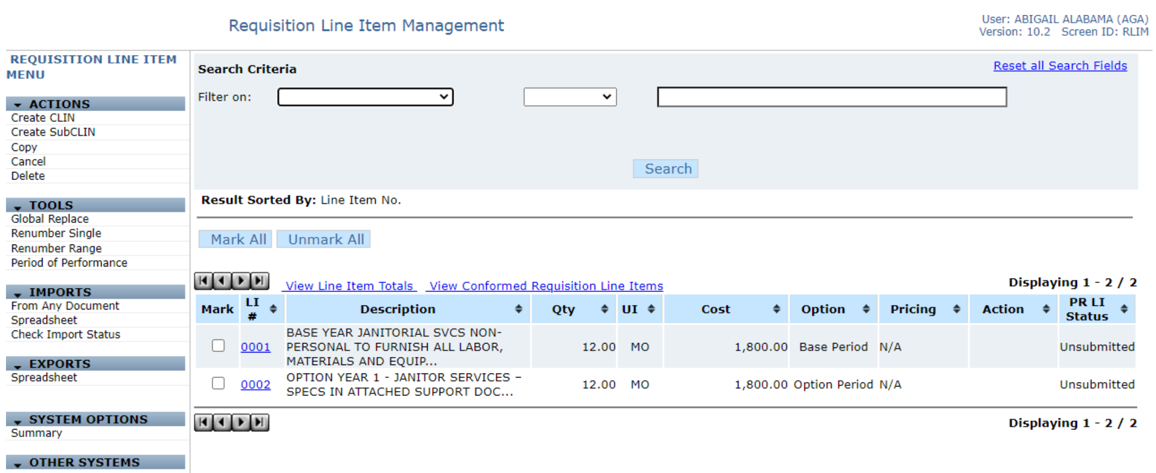
Objectives:

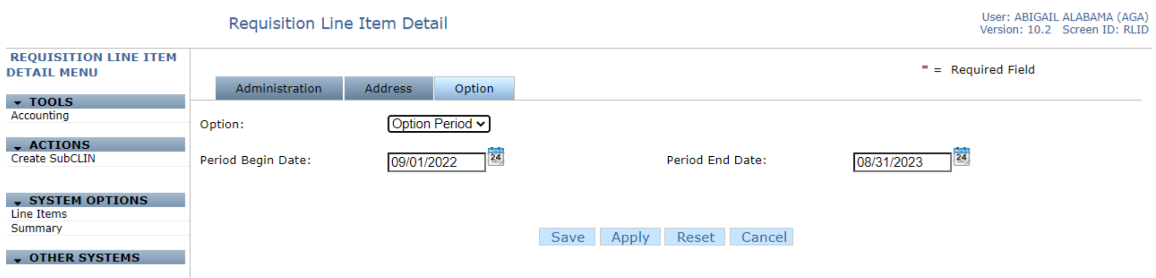
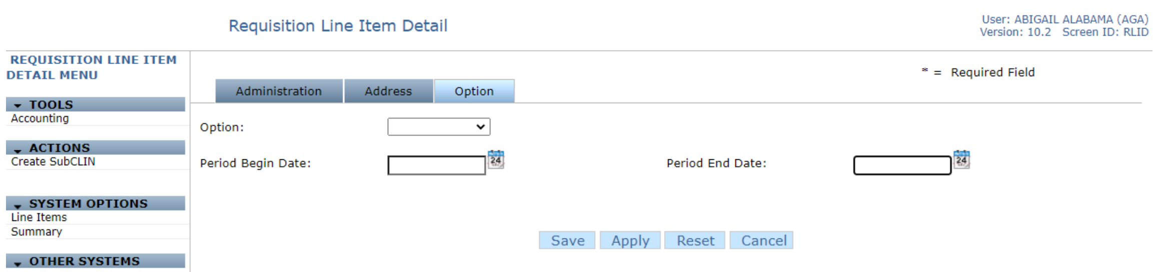
- Navigate through C.Request
- Create a Requisition to Exercise Option Period
- Copy previous requisition
- Use the Option View Tab
- Follow flow chart

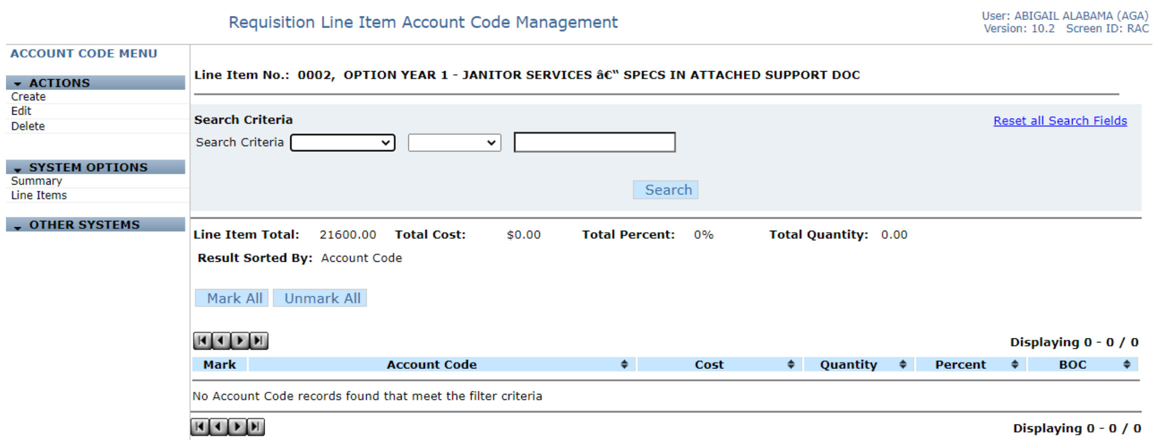
Instructions: Execute the following steps:

Your office still needs janitorial services for your location(s). You will need to create a requisition to exercise the option year already contained on the initial contract. You will copy the original requisition, delete the original base line, and make changes to the option line.

Step	Action
1	Locate the requisition through Hotlist, Recently Access, and/or Worksheet tab. Open the document. For training purposes, you're going to look for your Exercise 9 – JANITOR
2	From the **Requisition Summary** screen do the following: ➢ Click ***Copy*** from the *Menu Options.*
3	The **Requisition Document *Duplicate*** screen appears. ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** if you wish (i.e. [date] MOD TO EXERCISE OPT1) ➢ Click ***Save***

Step	Action
4	The **Requisition Administration** screen appears. Make any changes that are needed on this screen. When finished do the following: ➢ Validate all fields and make changes where necessary (i.e. Delivery Date) ➢ Enter the ***Purpose***. (i.e. MOD TO EXERCISE OPTION PERIOD 1) ➢ Click ***Save*** ➢ Add to ***Hotlist*** ➢ Click ***Line Items*** from the *Menu Options*
	Notes: ✓ *If there is a FCOTs number associated to this line and it's been a year, please make sure to verify the number is still correct or if a new one needs to be added.*
5	The **Requisition Line Item Management** screen appears with all CLINs:  ➢ Click ***Mark*** checkbox for Line 0001 ➢ Select ***Delete*** from the *Menu Options* ➢ Click ***OK*** from the message prompt ➢ Click ***0002*** from the Line Items to edit

Step	Action
6	The **Requisition Line Item Detail** screen appears: ➢ Change the *Modification LI Action* to:  ➢ Click the *Option* tab
7	 ➢ Change the option to "blank" ➢ Delete the Period Begin and End Dates  ➢ Click ***Apply*** ➢ Click ***Accounting***

Step	Action
8	The **Requisition Line Item Account Code Management** screen appears:  ➢ Select ***Create*** from the *Menu Options*
9	The **Account Code Detail** screen appears. ➢ Import your Personal Account Code ➢ Change the Object Class if needed (i.e. 25272535) ➢ Select ***Allocation By*** (i.e. Cost) ➢ Enter the ***Cost*** (i.e.21600) ➢ Enter the ***Quantity*** (i.e.12) ➢ Click ***Save***
10	➢ Verify the Line Item Total equals Total Cost ➢ Verify the Total Percentage equals 100% ➢ Verify the Total Quantity equals the total line item quantity ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*

Step	Action
	Notes: ✓ *In production, you would use the FY for when the option period would be exercised for both the Document Number as well as the Accounting. (i.e. FY 20 or FY 21).* ✓ *Option periods can be years or they can be months within a year.* ✓ *In Training, we are limited to only the current FY.*
11	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
12	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
13	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

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Exercise #13: Create a Modification Requisition – To De-Obligate Funding

Objectives:

- Navigate through C.Request
- Create a Requisition to de-obligate funding
- Copy previous requisition
- Follow flow chart

Instructions: Execute the following steps:

Notes:

- *Any modifications to awards are always done with a new requisition. However, the new requisition must have the same line number(s) as the original award.*
- *The new requisition must have zero dollar amounts on the line. You need to enter the amount you want de-obligated in the description along with any amount that has already been paid into the Commerce Financial System (CFS) along with the ACCS Strings that need to be de-obligated. Modification LI Action must be filled out correctly.*
- *The FMC Obligation Query in Discoverer can be used to find the de-obligation and paid amounts.*

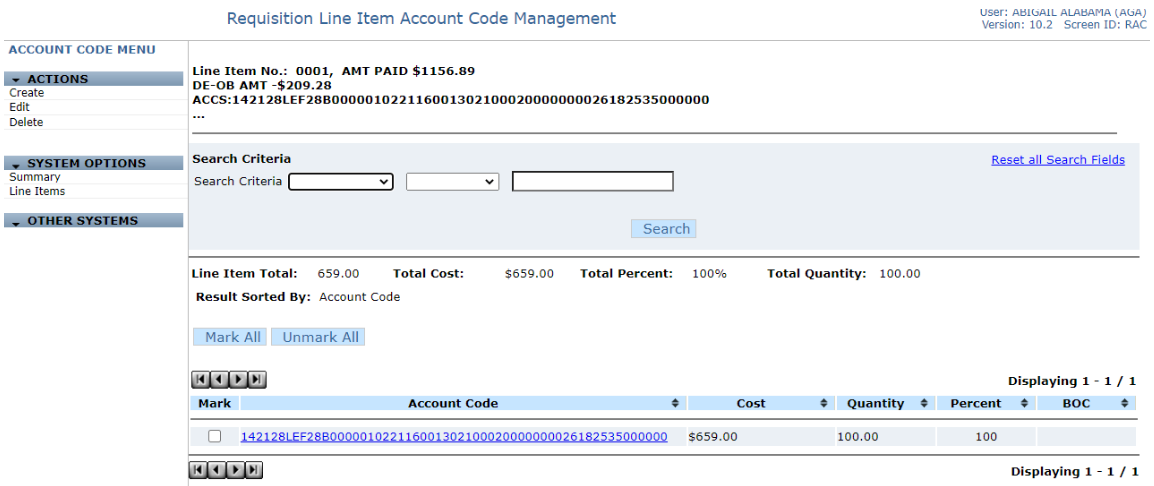
The original requisition was sent to acquisitions, awarded and obligated. Not all of the funds were used, so you will need to create a new requisition to de-obligate those funds. There are different reports to be used in figuring out what is left to de-obligate. Depending on the situation, an AGO officer may end up sending you the details of the requisition you need to create, or you can run the FMC Obligation Discoverer Workbook.

Step	Action
1	After running the report or getting something from the budget or AGO office, you see that you need to de-obligate the left-over amount.
2	Locate the requisition through Hotlist, Recently Access, and/or Worksheet tab. Open the document. For training purposes, you're going to look for your Exercise 4 – PRINTER

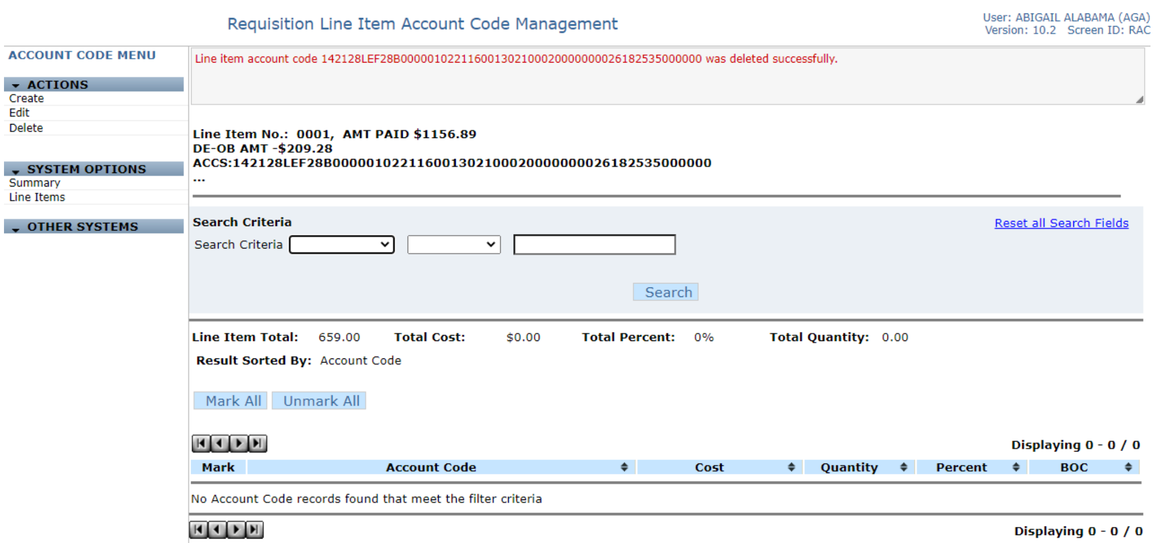
Step	Action
4	From the **Requisition Summary** screen do the following: ➢ Click ***Copy*** from the *Menu Options.*
5	The **Requisition Document *Duplicate*** screen appears. ➢ Choose ***Document Number*** from the *PICKLIST* ➢ Change the ***Document Name*** (i.e. [date] DEOB PRINTER) ➢ ➢ Click ***Save***
6	The **Requisition Administration** screen appears. Make any changes that are needed on this screen. When finished do the following: ➢ Enter the ***Purpose***. You should include the information that you are de-obligating money. ➢ Click ***Save*** ➢ Add to ***Hotlist*** ➢ Click ***Line Items*** from the *Menu Options*
7	The **Requisition Line Item Management** screen appears with all CLINs: ➢ Click ***0001*** from the Line Items to edit it
8	The **Requisition Line Item Detail** screen appears. ➢ Change ***Modification LI Action*** to ***Change Award Line Item*** ➢ Change the **Cost** to the **zero** for the line (i.e. 0.00) ➢ In the ***Description*** field enter the amount to be de-obligated (-209.28), Amount paid (1156.89) and ACCS code(s) the amount needs to being de-obligated from. Because you are creating a $0 requisition, this is the only place this information is captured. ➢ Click ***Apply*** ➢ Click on ***Accounting***

Step	Action
	Notes: ✓ *Negative amounts are not allowed in the cost field. De-obligation and paid amounts should be entered in the description only.* ✓ *No ACCS is necessary on the requisition if cost for the line is set to $0.* ✓ *Since no ACCS is necessary for a $0 requisition, before deleting it off this requisition, copy the string(s) to add to the description line prior to deleting any ACCS strings.*

Step	Action
9	The **Requisition Line Item Account Code Management** screen appears:



- ➢ Copy the ACCS string(s) that will be used
- ➢ Check the ***Mark*** checkbox in front of the ACCS
- ➢ Click ***Delete***
- ➢ Click ***OK***



- ➢ Click ***Line Items*** from the *Menu Options*

Step	Action
10	The **Requisition Line Item Management** screen appears with all CLINs: ➢ Click **0001** from the Line Items to edit it
11	The **Requisition Line Item Detail** screen appears. ➢ Paste the ACCS string(s) that will be de-obligated AMT PAID $1156.89 DE-OB AMT -$209.28 ACCS:142128LEF28B0000010221160013021000200000000 0026182535000000 ➢ Click ***Save*** ➢ Click ***Summary*** from the *Menu Options* ➢ Click ***Forms*** from the *Menu Options*
12	The **Requisition Form Setup** screen appears: ➢ Click the ***Accounting Codes*** checkbox ➢ Click the ***Cost of Line Item Applied to the Account Code*** checkbox ➢ Click the ***Delivery Date*** checkbox ➢ Click ***View Form*** A warning message will appear. ➢ Click ***OK***
13	A new window opens showing your requisition form in Adobe (pdf) format. You can then print or save your document. ➢ Close out the window. ➢ Click ***Save***
14	The **Requisition Summary** screen appears. For training purposes, you're done. In production you would still finish all the steps.

Step	Action
	Notes: ✓ *Since you can export the FMC Obligation Discoverer report as an excel document, it might be helpful to attach it to the requisition for the Contracting Specialist as a support document.*