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Creating A New Purchase Requisition

Helpful Hints:

Before you begin a Purchase Requisition it is important to know the following information:

- UPC Code
- Cost Center
- Functional Area
- WBS Element
- Approvers

Let's Begin:

Use the following portal path to begin this transaction

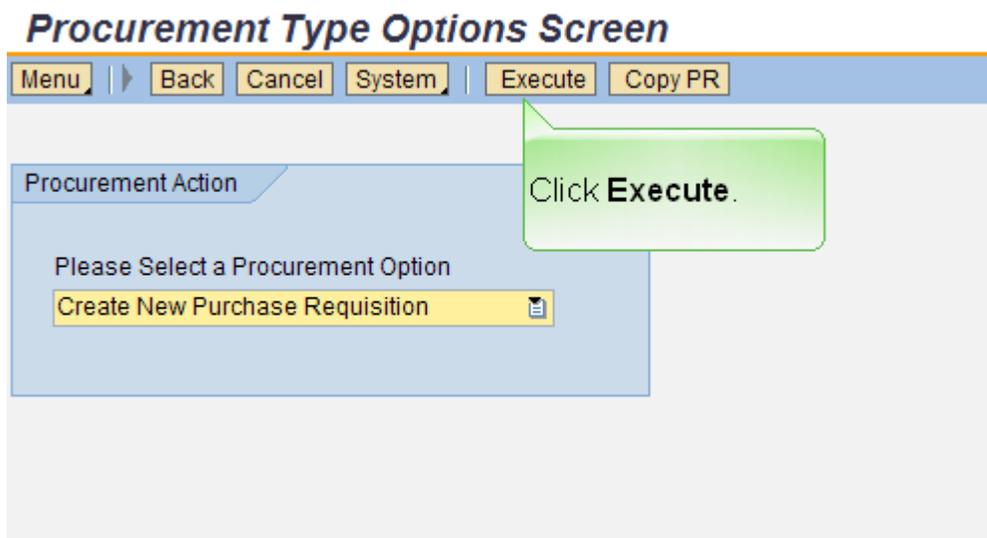
- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

1) Select **Create New Purchase Requisition** from the drop-down list. (The field will automatically default to **Create New Purchase Requisition**).



Note: If you are creating a new PR with data that resembles previously created PRs, click **Copy PR**. A search screen will allow you to select a PR to copy, and all data will default in. You can then just change the necessary information by following succeeding steps, beginning with step 3.

2) Click **Execute** to run the transaction.



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3) In the **Document Type** field click on the **drop down menu** icon.

(Note: When you see this icon  after clicking in a field, it indicates that a dropdown menu is available. It is recommended that you use the dropdowns when available).

Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status

Click the **drop down menu**.

PR Create

Document Type 

Requisition Title

Adv Procurement Plan

Requisitioner Timothy Smith

CO Responsible Total Value 0.00

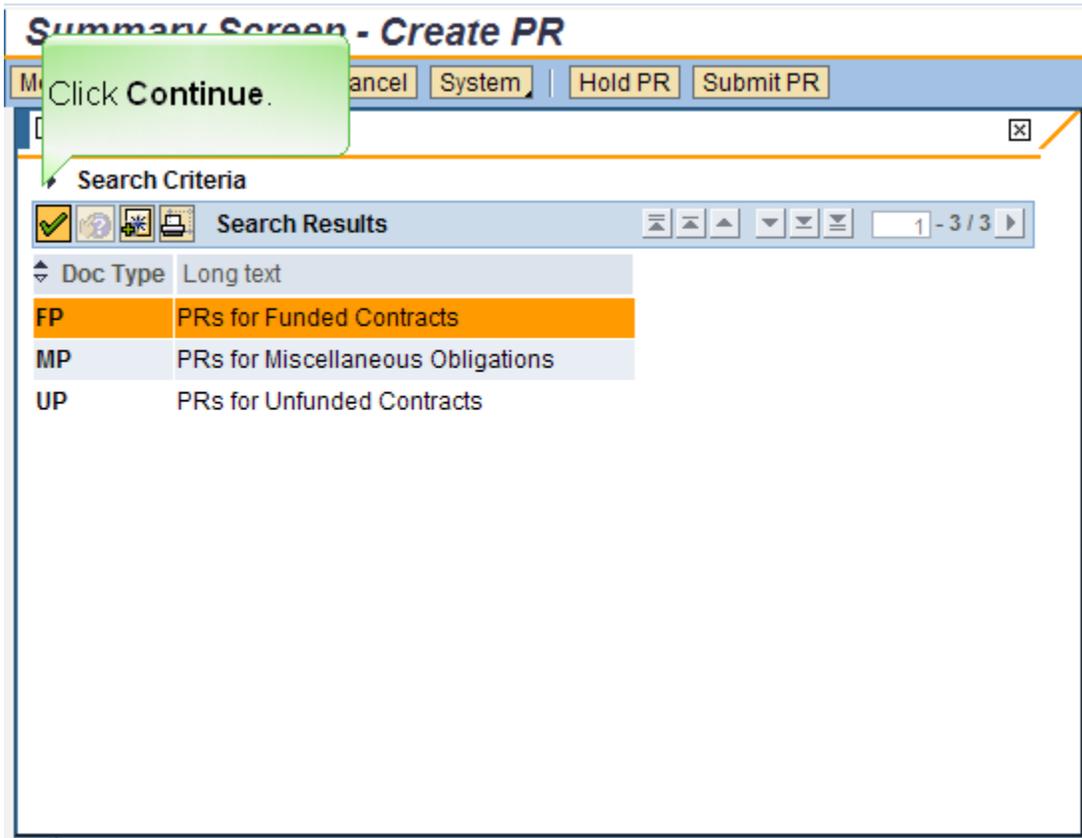
Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	To
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.0



There are three types of Purchase Requests (PRs) that you can create in FBMS.

- **FP – Funded Contracts** – Purchase Requests for items which there is funding.
- **MP – PRs for Miscellaneous Obligations** – For vehicle purchases only. These do not go through the Contract Management System. The Purchase Order is created directly in SAP.
- **UP – PRs for items that do not have available funding.** Primarily used for BPA (Blanket Purchase Agreement) and IDIQs. (Indefinite Delivery, Indefinite Quantity).

The Document Type **FP** is selected in this example.



- 4) Click  to continue to the **Summary Screen – Create PR**.

Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Header Text

PR Create

Document Type 

Requisition Title

Adv Procurement Plan

Requisitioner

CO Responsible Total Value

Click the **scroll bar** to see the remaining fields.

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	To
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0.0

Item Detail       

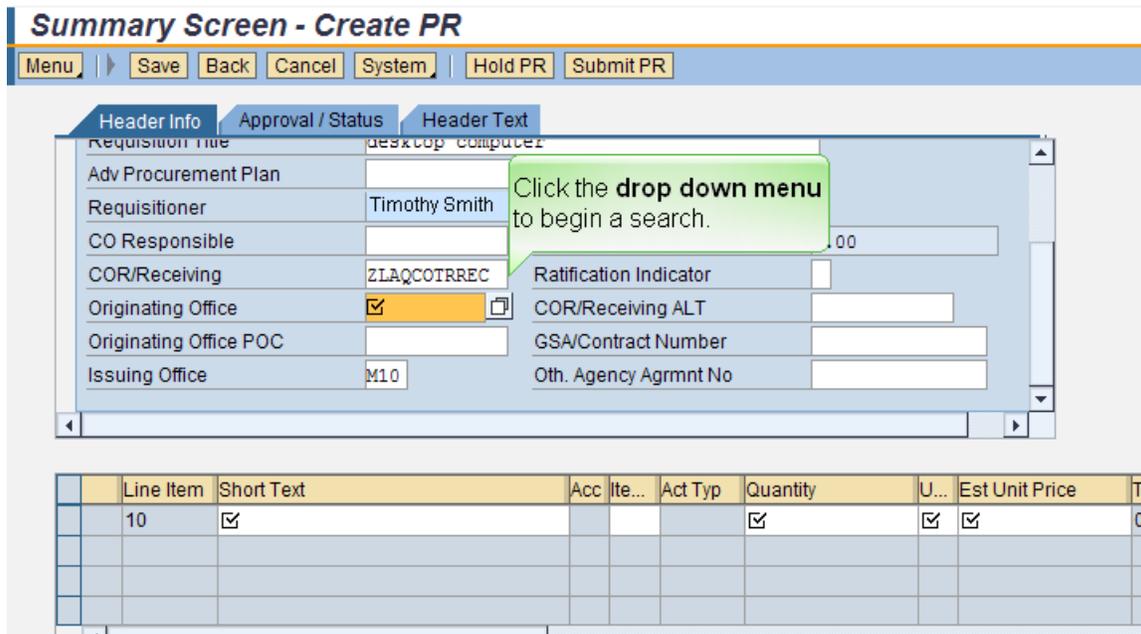
- 5) Click the **scroll bar** and scroll down to see the remaining fields on the screen.



All the required fields need to be completed prior to moving to another screen. The required fields are identified by . You may also fill in the non-required fields, such as the **Requisitioner** and the **CO Responsible** if you know the information.

- 6) In the **Requisitioner Title** field enter a brief description of the requested supply or service.
- 7) In the **COR/Receiving** field select the individual responsible for receiving good or services. Use the dropdown menu  to select the responsible COR from a list.
- 6) In the **Issuing Office** field, use the dropdown menu to enter the location of the office that is processing the Purchase Request.

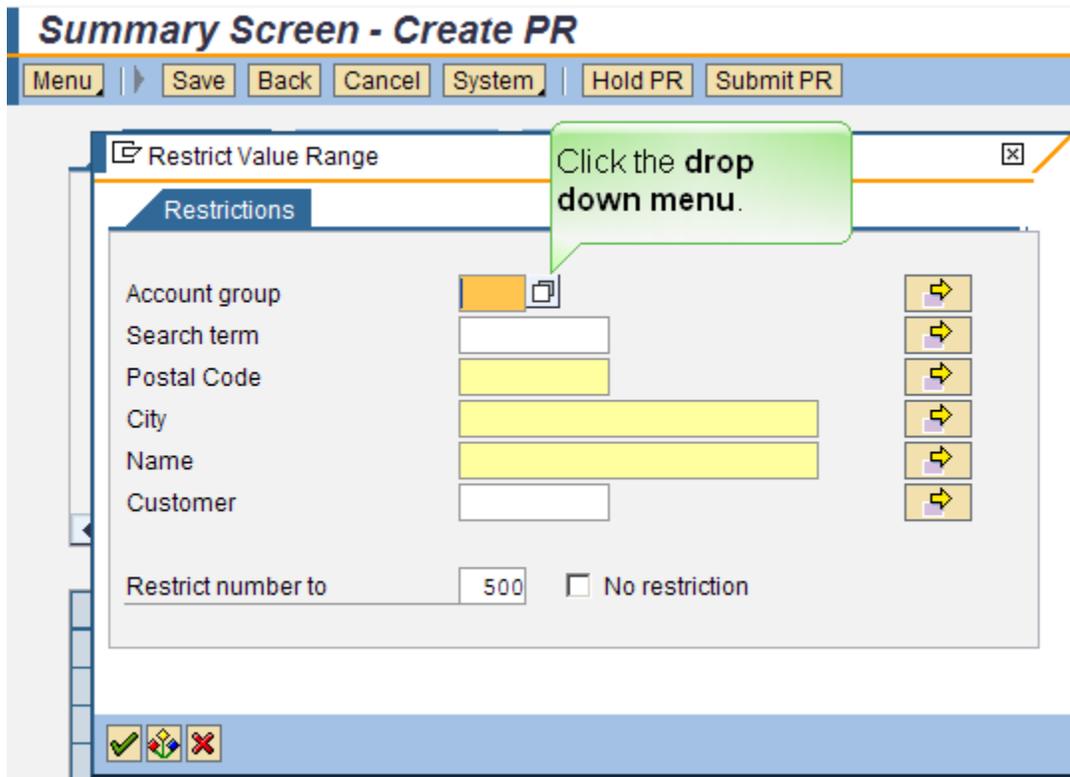
7) Click in the **Originating Office** field to highlight. This field represents the office originating the request and benefitting from the procurement.



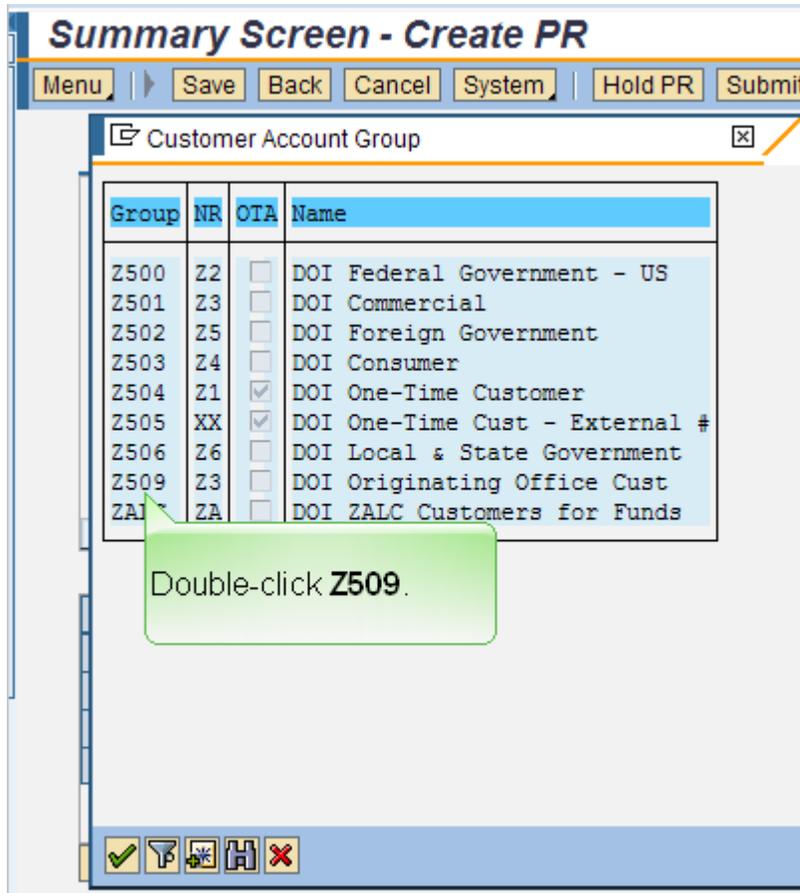
Line Item	Short Text	Acc	lte...	Act Typ	Quantity	U...	Est Unit Price	T
10	✓				✓	✓	✓	0

8) Click on the **drop down menu** to begin the search.

9) In the **Account group** field click on the **drop down menu**. This will limit your search for the originating office to those in the account group you select.

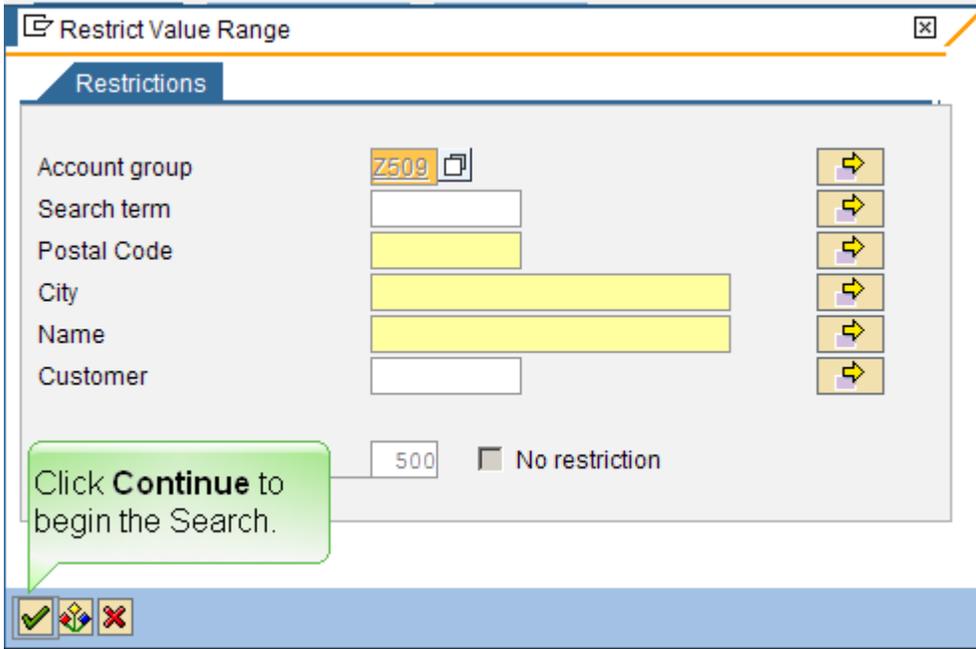


10) On the resulting search screen, double-click **Z509** to select it. **Z509** will populate the **Account Group** field on the search screen.



Always search the originating office field using **Z509** as the **account group**.

11) Click  to continue and begin the search.



Restrict Value Range

Restrictions

Account group:  

Search term: 

Postal Code: 

City: 

Name: 

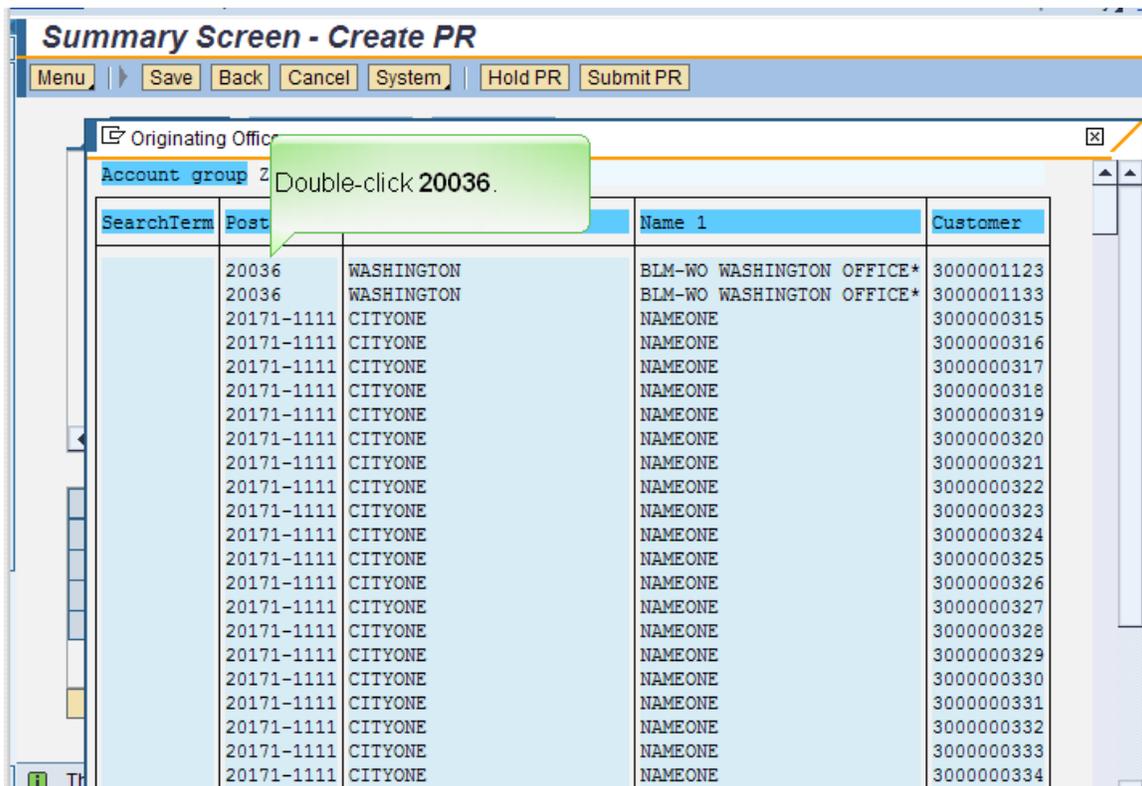
Customer: 

No restriction

Click **Continue** to begin the Search.

12) When the list of **Originating Offices** displays, double-click the office of your choice (in the example below, the chosen office was 20036).



Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Originating Offices

Account group:

SearchTerm	Post	Name 1	Customer
20036	WASHINGTON	BLM-WO WASHINGTON OFFICE*	3000001123
20036	WASHINGTON	BLM-WO WASHINGTON OFFICE*	3000001133
20171-1111	CITYONE	NAMEONE	3000000315
20171-1111	CITYONE	NAMEONE	3000000316
20171-1111	CITYONE	NAMEONE	3000000317
20171-1111	CITYONE	NAMEONE	3000000318
20171-1111	CITYONE	NAMEONE	3000000319
20171-1111	CITYONE	NAMEONE	3000000320
20171-1111	CITYONE	NAMEONE	3000000321
20171-1111	CITYONE	NAMEONE	3000000322
20171-1111	CITYONE	NAMEONE	3000000323
20171-1111	CITYONE	NAMEONE	3000000324
20171-1111	CITYONE	NAMEONE	3000000325
20171-1111	CITYONE	NAMEONE	3000000326
20171-1111	CITYONE	NAMEONE	3000000327
20171-1111	CITYONE	NAMEONE	3000000328
20171-1111	CITYONE	NAMEONE	3000000329
20171-1111	CITYONE	NAMEONE	3000000330
20171-1111	CITYONE	NAMEONE	3000000331
20171-1111	CITYONE	NAMEONE	3000000332
20171-1111	CITYONE	NAMEONE	3000000333
20171-1111	CITYONE	NAMEONE	3000000334

Double-click 20036.



13) The **Originating Office** field is now populated.

14) The next step is to select Approvers for the purchase request. Click on the

Approval / Status Tab. This will take you to the screen where you will enter approvals.

Summary Screen - Click Approval / Status.

Menu | Save | Back | Cancel | Submit PR

Header Info | **Approval / Status** | Header Text

PR Create

Document Type: FP

Requisition Title: desktop computer

Adv Procurement Plan: []

Requisitioner: Adv Procurement Plan

CO Responsible: []

CO/Receiving: ZLAQCOTRREC

Originating Office: 3000001123

Total Value: 0.00

Ratification Indicator: []

COR/Receiving ALT: []

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	T
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0



Approver Process for Purchase Requisitions

 The next steps demonstrate the Approver process. Supervisor and Certifying Funds Approver are **always** required. The other approvers are optional.

There are five types of Approvers that you may need on a Purchase Request:

Supervisor – Required to approve all purchase requests.

Property Approver – Required for any item that is accountable property

IT Approver – Required for all IT items.

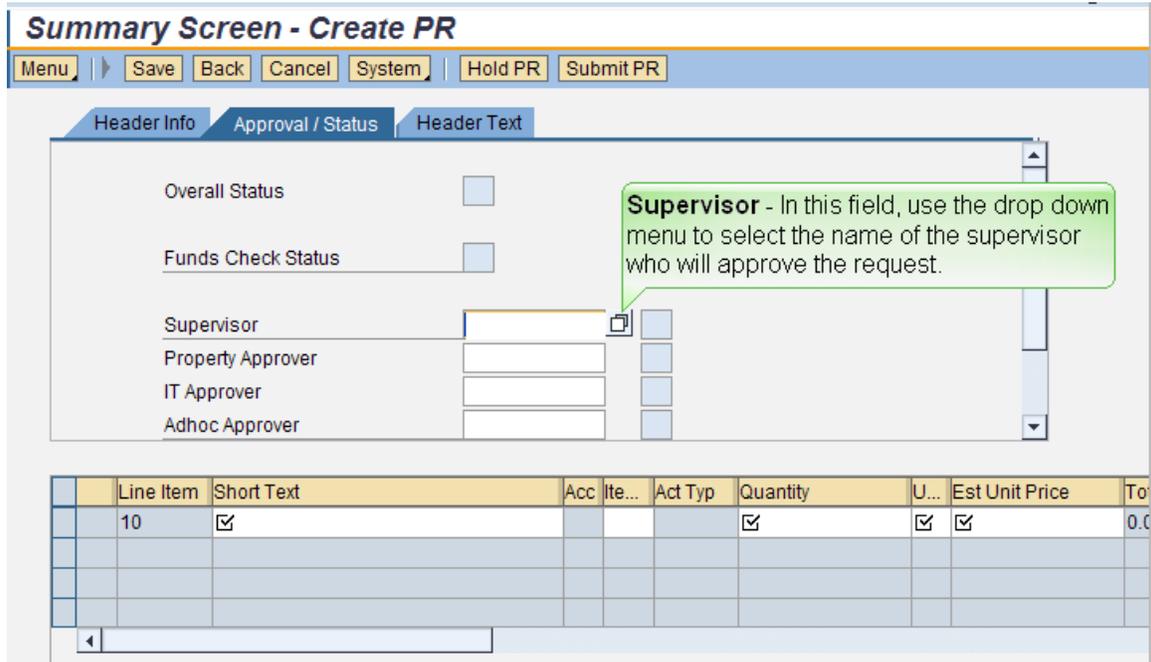
Ad Hoc Approver – You can add these approvers as needed; this is an additional level of approval that your bureau may require.

Certifying Funds Approver – Required to approve all purchase requests; verifies that funding is available and funding information on the PR is correct.



Always use the dropdown menus to select approvers.

15) Click the drop down box in the **Supervisor** field to search for the supervisor approver.



Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | **Approval / Status** | Header Text

Overall Status

Funds Check Status

Supervisor

Property Approver

IT Approver

Adhoc Approver

Supervisor - In this field, use the drop down menu to select the name of the supervisor who will approve the request.

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	To
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0.0

16) Highlight a **Supervisor** to select.

17) Click  to continue. The **Supervisor** field will populate.

Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Click Continue.

Search Criteria

Search Results 1 - 100 / 194

BusA	User Name	First name	Last name	Full Name
L000	ZLAQSUPVSFBLM		Acquisition Supervisor	BLM Acquisition Supervisor
L000	ZLAQSUPVSFBLM		Property Approver	BLM Property Approver
L000	ZLAQSUPVSFBLM		IT Approver	BLM IT Approver
L000	ZLAQSUPVSFBLM		AdHoc Approver	BLM AdHoc Approver
L000	ZUSER01	BLM	User01	BLM User01
L000	ZUSER01HL		ZUSER01HL	ZUSER01HL
L000	ZUSER02	BLM	User02	BLM User02
L000	ZUSER03	BLM	User03	BLM User03
L000	ZUSER04	BLM	User04	BLM User04
L000	ZUSER05	BLM	User05	BLM User05
L000	ZUSER06	BLM	User06	BLM User06
L000	ZUSER07	BLM	User07	BLM User07

18) Use the same method to select **Property, IT, and Ad Hoc Approvers**, if required for your purchase.

19) Click the drop down box in the **Certifying Funds Approver** field to search for the certifying funds approver.

Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Header Text

Funds Check Status

Supervisor Acq Supervisor

Property Approver

IT Approver

Adhoc Approver

Certifying Funds Approver 

Transmission Status

Click the drop down menu.

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	To
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0.0

Item Detail       



20) Highlight a **Certifying Funds Approver**.

21) Click  to continue. The **Certifying Funds Approver** field will populate.

Summary Screen - Create PR

Mer |

Click Continue.

Search Criteria

Search Results [Navigation icons]

BusA	User Name	First name	Last name	Full Name
L000	ZLAQCRFDAP	BLM	Budget Office Approver	BLM Budget Office Approver
L000	ZUSER01	BLM	User01	BLM User01
L000	ZUSER01HL		ZUSER01HL	ZUSER01HL
L000	ZUSER02	BLM	User02	BLM User02
L000	ZUSER03	BLM	User03	BLM User03
L000	ZUSER04	BLM	User04	BLM User04
L000	ZUSER05	BLM	User05	BLM User05
L000	ZUSER06	BLM	User06	BLM User06
L000	ZUSER07	BLM	User07	BLM User07
L000	ZUSER08	BLM	User08	BLM User08
L000	ZUSER09	BLM	User09	BLM User09
L000	ZUSER10	BLM	User10	BLM User10

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Information on the **Header Text** tab must now be completed. This tab contains information such as quantity, unit of measure, estimated unit price, and UPC code.

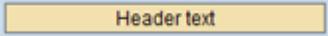
22) Click on the **Header Text** Tab.

The screenshot shows the 'Summary Screen - Create PR' interface. The 'Header Text' tab is selected, and a green callout box points to it with the text 'Click Header Text.' The interface includes a navigation bar with 'Status > Purchase Request' and 'History Back'. Below the navigation bar are buttons for 'Menu', 'Save', 'Back', 'Cancel', and 'System'. The main content area is divided into three tabs: 'Header Info', 'Approval / Status', and 'Header Text'. The 'Header Text' tab contains the following fields:

- Funds Check Status
- Supervisor Acq Supervisor
- Property Approver
- IT Approver
- Adhoc Approver
- Certifying Funds Approver Budget Office
- Transmission Status

Below the form is a table with the following columns: Line Item, Short Text, Acc, Ite..., Act Typ, Quantity, U..., Est Unit Price, and To. The table contains one row with the following data:

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	To
10	<input checked="" type="checkbox"/>				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0.0

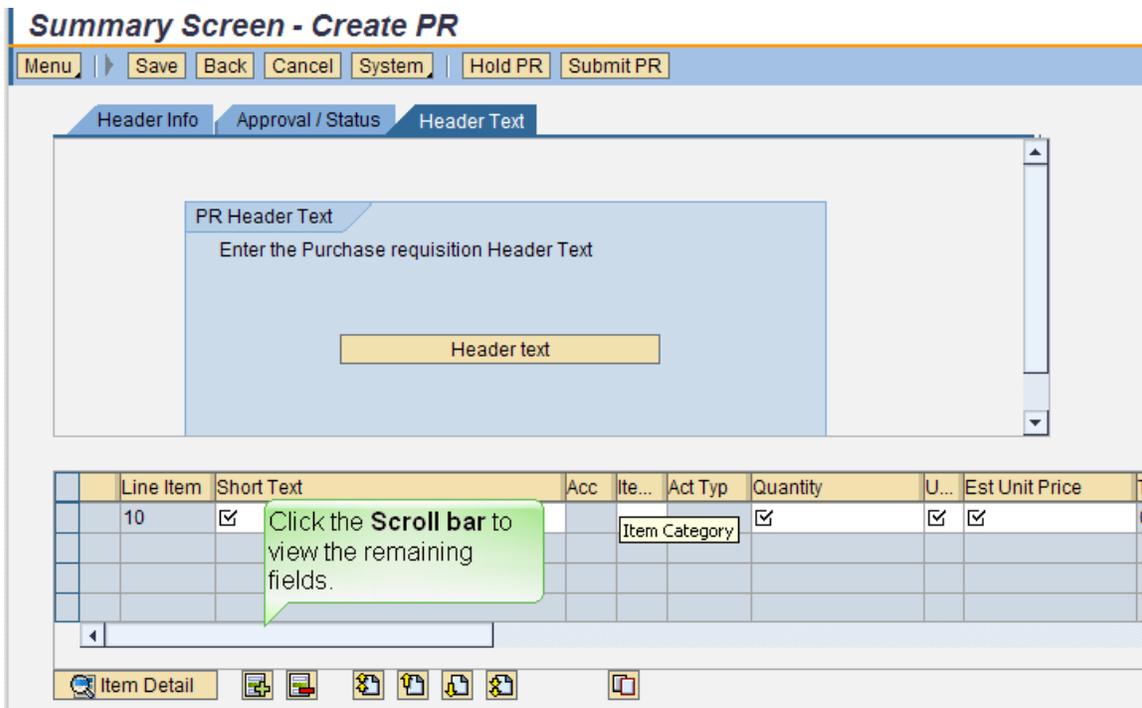
23) You may click  to enter a long description of the item. This is optional. When text is added at the Header level it will transfer to the Header of the Purchase Order and can be seen by the vendor. If you choose to do add header text, once you click on the **Header Text** button, a popup box will allow you to type in the information. After doing so, click  to continue.

24) In the **Short Text** field enter a description of the line item.

25) In the **Ite....(Item Category)** field, enter the item category “D” if you are ordering services. If you are ordering goods (supplies), leave this field blank.



Although the Item Category field is not a required field, it should always be completed.



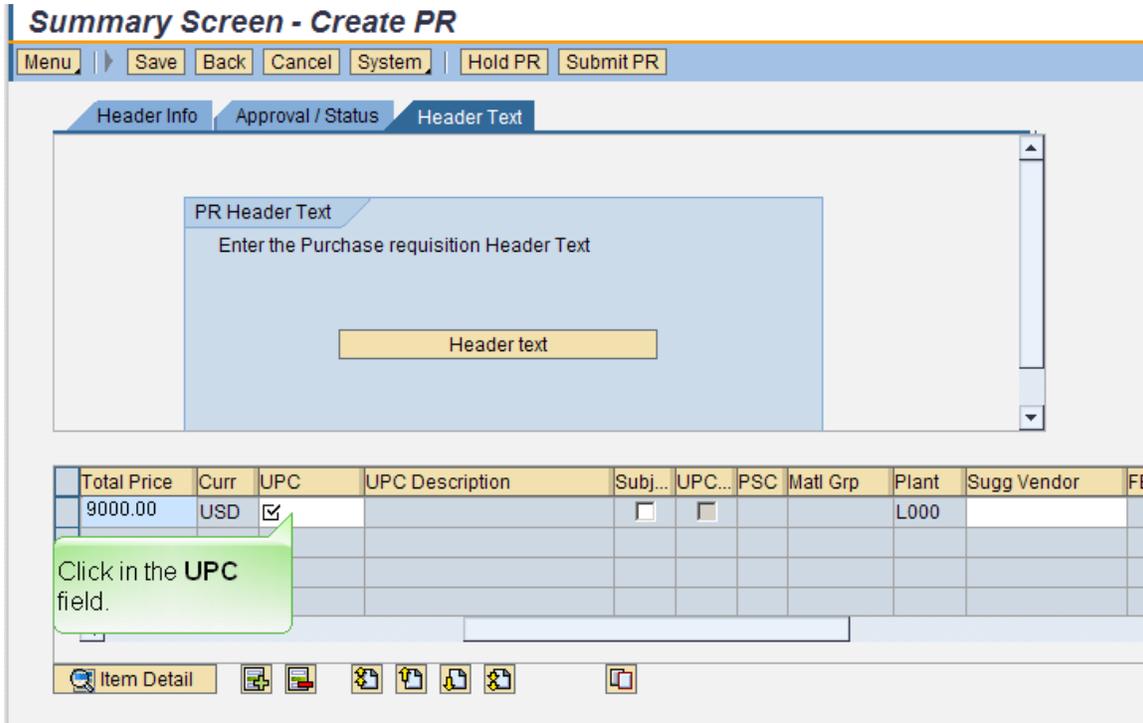
Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	T
10	<input checked="" type="checkbox"/>		Item Category		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		0

26) In the **Quantity** field enter the number of items you are ordering.

27) In the **U...(Unit of Measure)** field, enter **EA** for Each for goods. The unit of measure will always be **AU** (Activity Unit) if you are ordering a service.

28) In the **Est. Unit Price** field enter the estimated unit price of the good or service.

- 29) Use the **scroll bar** to scroll right and view the remaining fields.
- 30) Click in the **UPC** field.



The **UPC**, or **User Product Code**, is an 8-digit code identifying the type of item or service. The UPC you choose will automatically assign the commitment item (formerly called the Budget Object Class, or BOC) on the PR. It also determines whether the item being purchased is accountable property or IT-related, which drives whether you must choose property and/or IT approvers for the PR in addition to the other required approvals. Selection of the correct UPC is critical to ensure that the accounting data and approvals for the PR are correct. Always select the UPC from the dropdown menu.

A UPC Reference guide is included in Appendix A of this document.

31) Use the dropdown to view and search for the **UPC Code**.

Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Header Text

PR Create

Document Type: FP

Requisition Title: desktop computer

Adv Procurement Plan: []

Requisitioner: Timothy Smith

CO Responsible: []

Click the **drop down menu** to view and search for codes.

Unit Price	Total Price	Curr	UPC	UPC Description	Subj...	UPC...	PSC	Matt Grp	Plant	Sug
900.00	9000.00	USD	[]	[]	[]	[]	[]	[]	L000	[]

Item Detail [] [] [] [] [] [] [] [] [] []

32) Click the arrow ▶ in front of **Search Criteria**

Status > Purchase Request | History > Back

Click the **arrow** in front of Search Criteria.

Restrict Value Range (1)

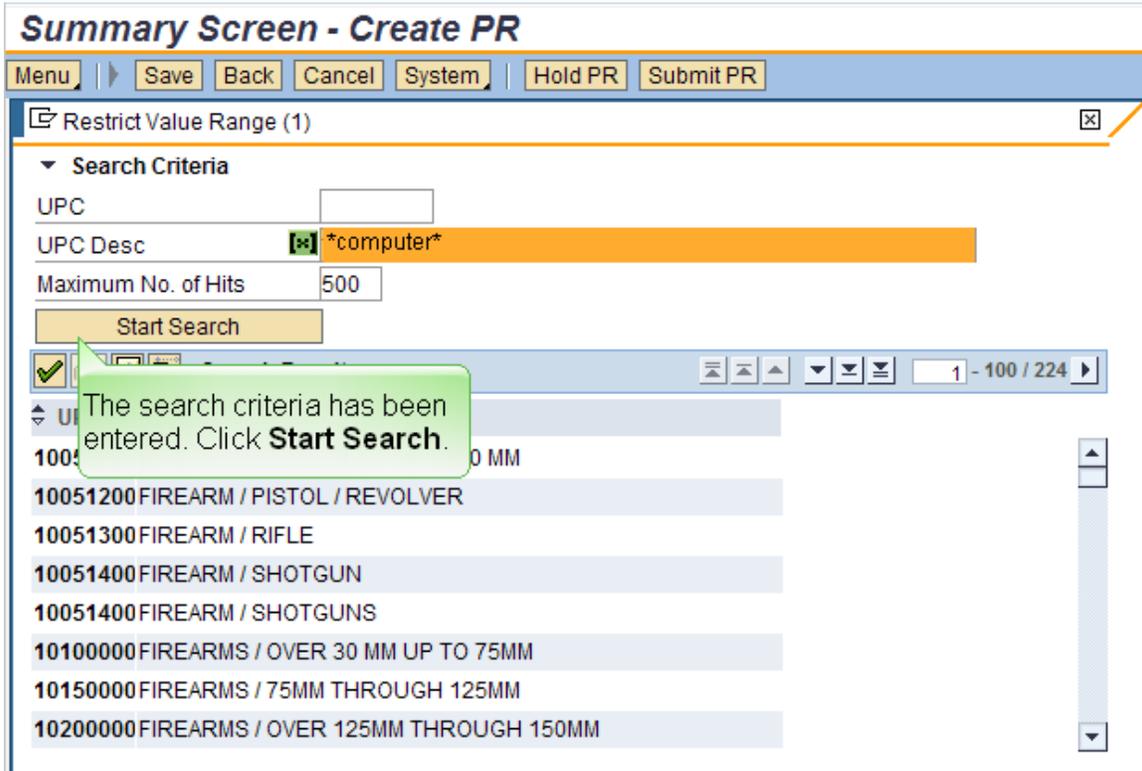
Search Criteria

Search Results 1 - 100 / 224

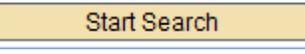
UPC	UPC Description
10050100	OTHER FIREARMS THROUGH 30 MM
10051200	FIREARM / PISTOL / REVOLVER
10051300	FIREARM / RIFLE
10051400	FIREARM / SHOTGUN
10051400	FIREARM / SHOTGUNS
10100000	FIREARMS / OVER 30 MM UP TO 75MM
10150000	FIREARMS / 75MM THROUGH 125MM
10200000	FIREARMS / OVER 125MM THROUGH 150MM
10250000	FIREARMS / OVER 150 MM THROUGH 200MM
10300000	FIREARMS / OVER 200MM THROUGH 300MM
10350000	FIREARMS / OVER 300MM
10400000	CHEMICAL WEAPONS & EQUIPMENT

Item Detail [] [] [] [] [] [] [] [] [] []

33) In the **UPC Desc** field type text that describes the type of object you are purchasing.

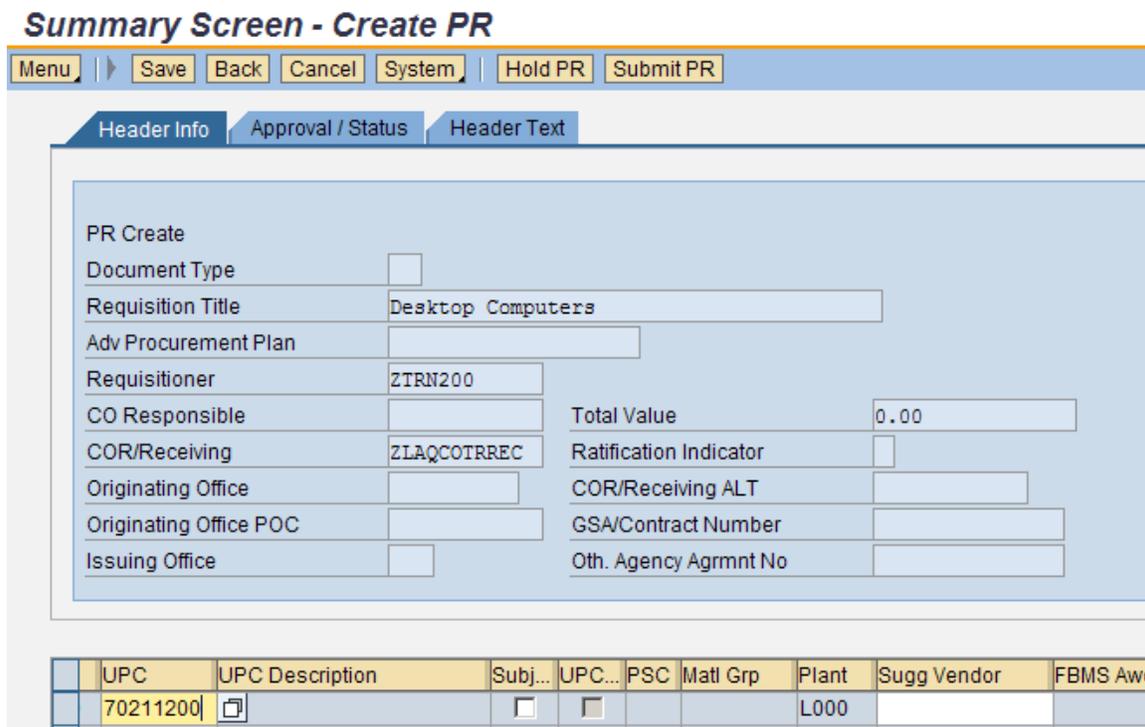


When using the search option, the wildcard symbol is an asterisk (*) There are options to search by code, (which begins with a number for supplies or an alpha character for services), or by item description. Use the asterisk symbol before and after your search word to bring back results with that word in the in the UPC description, (for example, ***computer***).

34) Click 

35) Double click on the correct UPC for your item. The **UPC** field will populate.

 UPCs for goods start with a number (e.g., 70211), and UPCs for services start with a letter (e.g., R256).



 To the right of the UPC Description field you will see the **Subj field**. Placing a checkmark in this box notifies the approvers, contracting officer, or buyer that the purchase requisition is subject to availability of funds.

The **Item Detail** information must now be added to the PR. This information includes account assignment, accounting information such as cost center and functional area, delivery date, address codes, etc.

36) Highlight the line item on the PR by clicking on the box to the left of that line. Then click



Summary Screen - Create PR

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Header Text

PR Create
 Document Type: FP
 Requisition Title: desktop computer
 Adv Procurement Plan:
 Requisitioner: Timothy Smith
 CO Responsible: Total Value: 0.00

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	Tot
10	desktop computers				10	EA	900.00	0.00

Click **Item Detail**.

Item Detail | [Icons] | Choose <detail>; Detail



Once you are on the **Accounting/Delivery Address/History – Create PR** screen, you may add text about the item for the contracting officer or buyer. This is optional, but if you wish to add text, highlight your line item by clicking on the box to the left of the line item, then click the

 button. Type in your item detail text, then click  to continue.

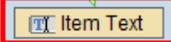
Accounting/ Delivery Address/ History - Preaward Changes to PR 10  

Menu  Back Cancel System  UPC Override

Item Info

PR Item Number	20	Unit Price	400.00
Item Category		Amount	800.00
Plant	I000	Item Quantity	2.000
BETC	DISB	TAS	14X11
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	74900100	G/L Account	6100.312B0
Material group	7490	Acct Assgn Category	K

Click Item Text.





38) Enter the following Accounting information in the respective fields:

Cost Center – required field

Functional Area – required field

Fund – required field (for some bureaus this may automatically fill in when you enter the cost center and functional area; other bureaus require you to fill it in).

WBS – entry of the WBS is dependent on your bureau's process

You may type these entries in directly, or use the dropdown menus to search for them.

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	10	Unit Price	900.00
Item Category		Amount	9,000.00
Plant	L000	Item Quantity	10.000 EA
BETC	DISB	TAS	
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	70211200	G/L Account	6100.312F0 <input type="button" value="Item Text"/>
Material group	7021	Acct Assgn Category	K

Accounting Info | Delivery Address | History

Distribution Idr UPC Override Flag Tradein

	Item	Seq #	Percent	Quantity	U...	Amount	Cost Center	Functional Area	Fund	WBS
✓	10	1		10.000	EA	9,000.00	☑	☑		



39) Scroll to the right to enter the following accounting information fields, if required:

Order – refers to Work Order; required for fleet maintenance purchase requests

Asset Number – entered by the property specialist during the review process

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	<input type="text" value="10"/>	Unit Price	<input type="text" value="900.00"/>
Item Category	<input type="text"/>	Amount	<input type="text" value="9,000.00"/>
Plant	<input type="text" value="L000"/>	Item Quantity	<input type="text" value="10.000"/> EA
BETC	<input type="text" value="DISB"/>	TAS	<input type="text"/>
Ordering Agency Ref.	<input type="text"/>	GSA/Fedstrip No.	<input type="text"/>
User Product Code	<input type="text" value="70211200"/>	G/L Account	<input type="text" value="6100.312F0"/> <input type="button" value="Item Text"/>
Material group	<input type="text" value="7021"/>	Acct Assgn Category	<input type="text" value="K"/>

Accounting Info | **Delivery Address** | **History**

Distribution Idr UPC Override Flag Tradein

Item	Seq #	Commitm...	Asset No	Asset Sub	Order	Curr	G/L Account	BA	Funds Center	Cont	Profit
✓ 10	1					USD	6100.312F0	L000			

40) Click the  **Validate** button to validate and derive the funding information.

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	10	Unit Price	900.00
Item Category		Amount	9,000.00
Plant	L000	Item Quantity	10.000 EA
BETC	DISB	TAS	
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	70211200	G/L Account	6100.312F0 
Material group	7021	Acct Assgn Category	K

Accounting Info | **Delivery Address** | **History**

Distribution Id: UPC Override Flag Tradein

Item	Seq #	Percent	Quantity	U...	Amount	Cost Center	Functional Area	Fund	WBS
✓ 10	1		10.000	EA	9,000.00	MMOM402000	141RGR000.AAG000		

 By clicking on the validate button you will automatically advance to the **Accounting/Delivery Address/History** screen. If your accounting information is incorrect you will receive an error message at the bottom of the screen detailing the error. Correct the error, then continue.



41) On the **Accounting/Delivery Address/History** screen click in the **Delivery Date/POP From** field to select a period of performance from date.

For all item categories this is a required field. By clicking the dropdown menu, you may select the date from the calendar.

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	10	Unit Price	200.00
Item Category		Amount	200.00
Plant	L000	Item Quantity	1.000 EA
BETC	DISB	TAS	
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	13950000	G/L Account	6100.267A0 <input type="button" value="Item Text"/>
Material group	1395	Acct Assgn Category	K

Click the **Delivery Date / POP From** field to select a date.

Delivery date/POP From - Period of Performance from date. For all item categories this field is required.

Delivery Date / POP From Delivery Date / POP To

Delivery Address Code

Name

42) Select the date from the calendar, then click to continue.

Calendar

04/28/2009

2009	12	16	17	18	19	20	21	22
	13	23	24	25	26	27	28	29
APR 2009	14	30	31	1	2	3	4	5
	15	6	7	8	9	10	11	12
	16	13	14	15	16	17	18	19
	17	20	21	22	23	24	25	26
	18	27	28	29	30	1	2	3
MAY 2009	19	4	5	6	7	8	9	10
	20	11	12	13	14	15	16	17
	21	18	19	20	21	22	23	24
	22	25	26	27	28	29	30	31
	23	1	2	3	4	5	6	7



43) In the **Delivery Address Code** field click the drop down menu to begin a search.

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	10	Unit Price	900.00
Item Category		Amount	9,000.00
Plant	I000	Item Quantity	10.000 EA
BETC	DISB	TAS	
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	70211200	G/L Account	6100.312F0 <input type="button" value="Item Text"/>
Material group	7021	Acct Assgn Category	K

Accounting Info | **Delivery Address** | History

Delivery Date Delivery Date / POP To

Delivery Address Code

Name



When searching for a Delivery Address Code, always restrict the **Address Group** to **ME01**.

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44) In the **Address group** field type **ME01**

45) Click **Start Search** to bring up the search results.

Address number (1)

Search Criteria

Category: Country, region, sort field, name, City, Street

Country Key:

Region:

Search Term 1:

Search Term 2:

Company name:

City:

Street:

Address group: **ME01**

Maximum No. of Hits: 500

Start Search

Search Results 0 / 0

46) On the search results screen, double-click the desired address to select it. It will automatically populate the **Delivery Address Code** field.

Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Address number (1)

Search Criteria

Search Results

City	Rg	Search Term 1	Search Term 2	Name	Street	City
CO		DAVE		Dave Wunder	Denver Federal Center, Bldg. 810	Denver
US				Negative Test		
US				Refer to line item description		
US				Testing	10361 Sunville drive	Herndon
US				testing123		
US				XYZ	NNN Dr	Ashburn
US	GINGI			gingi	building 810	denver
US	AK	AK010		BLM-AK ALASKA STATE OFFICE*	6881 ELMORE ROAD	ANCHORAGE
US	AK	AK010		BLM-AK ALASKA STATE OFFICE*	6881 ELMORE ROAD	ANCHORAGE
US	AK	AK010		BLM-AK ANCHORAGE FIELD OFFICE	6881 ELMORE ROAD	ANCHORAGE
US	AK	AK010		BLM-AK ANCHORAGE FIELD OFFICE	6881 ELMORE ROAD	ANCHORAGE
US	AK	AK012		BLM-AK GLENNALLEN FIELD OFFICE*	MILE 186.5, GLENN HIGHWAY	GLENNALLEN
US	AK	AK012		BLM-AK GLENNALLEN FIELD OFFICE*	MILE 186.5, GLENN HIGHWAY	GLENNALLEN
US	AK	AK020		BLM-AK FAIRBANKS DISTRICT OFFICE	1150 UNIVERSITY AVENUE	FAIRBANKS
US	AK	AK020		BLM-AK FAIRBANKS DISTRICT OFFICE	1150 UNIVERSITY AVENUE	FAIRBANKS



Accounting / Delivery Address / History - Create PR

Menu | Back | Cancel | System | UPC Override

Item Info

PR Item Number	10	Unit Price	900.00
Item Category		Amount	9,000.00
Plant	L000	Item Quantity	10.000 EA
BETC	DISB	TAS	
Ordering Agency Ref.		GSA/Fedstrip No.	
User Product Code	70211200	G/L Account	6100.312F0 Item Text
Material group	7021	Acct Assgn Category	K

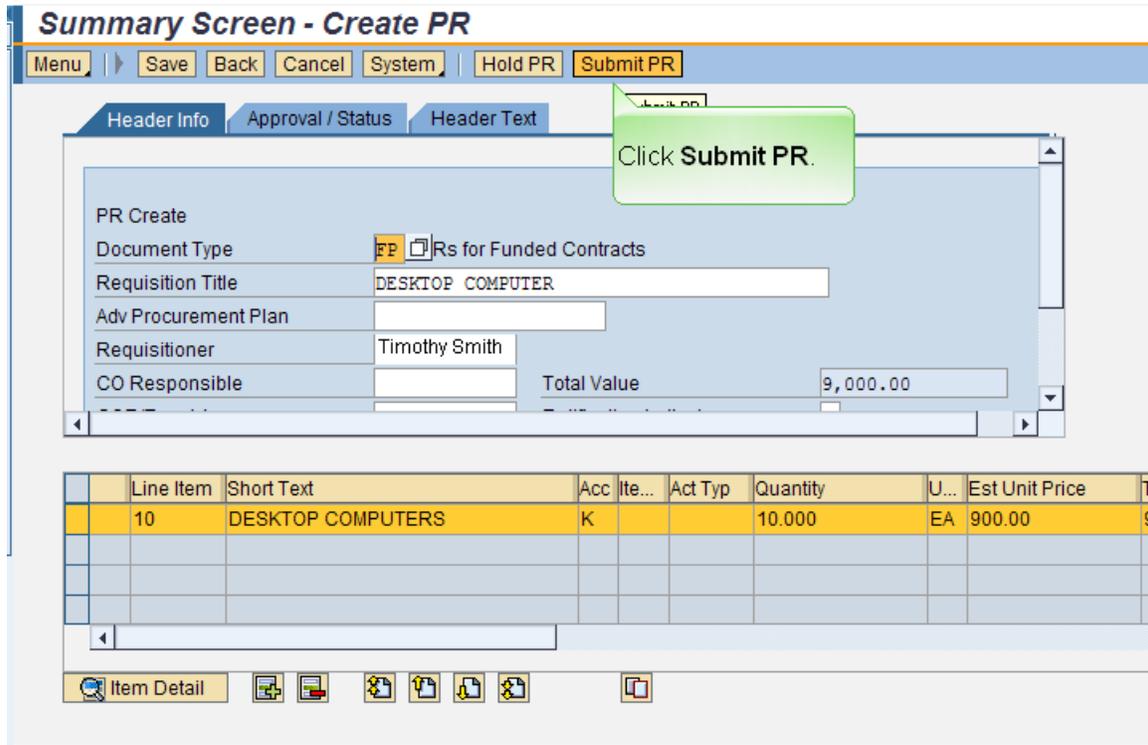
Accounting Info | **Delivery Address** | History

Delivery Date / POP From	04/28/2009	Delivery Date / POP To	
Delivery Address Code	3315912 Address Details		
Name			
Street			
House Number			
City			
Postal Code			
Country			

You are now ready to submit your Purchase Requisition.

47) Click [Back](#) twice to return to the **Summary Screen – Create PR** screen

48) If you need to review the PR before you submit it, or if you need to add an attachment, you may click **Hold PR** .



A Purchase Requisition must be created and saved before you can add an attachment. To do this you can create the PR and select **Hold PR** . After creating and holding the PR you can add an attachment using the following menu path:

Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** and select **Preward Changes to a PR** from the dropdown menu on the **Procurement Type Options** screen.

For more information and the step-by-step process for adding an attachment, **see Purchase Requisition Change – Preward, Adding an Attachment to a Purchase Request** in this document.

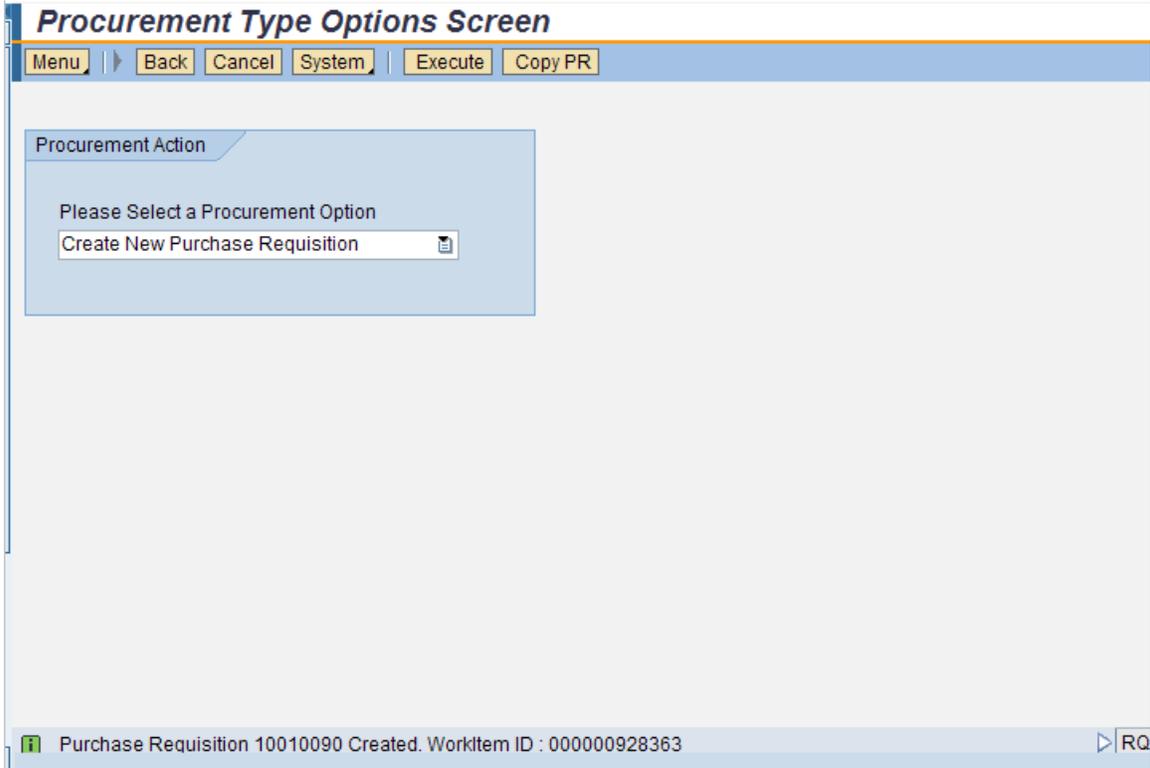
49) If you are ready to submit the PR, click **Submit PR** .



If there are errors in your PR, you will receive an error message detailing the problem at the bottom of your screen. Common errors include forgetting to designate an IT or Property Approver for IT or property purchases, and errors in entering accounting information. If you receive an error message, correct the PR and resubmit it.



If submission of your PR is successful, you will receive a message at the bottom of the screen verifying that the PR has been created. Write down the Purchase Requisition number for future reference. Once your PR is submitted, workflow will notify the approvers you designated that the PR is waiting for approval.



Clicking Save will save the PR but will not submit it. You must click **Submit PR** in order to submit the PR for approval.

Displaying a Purchase Requisition

Helpful Hints:

Before you display a purchase requisition, it is important to know the following information:

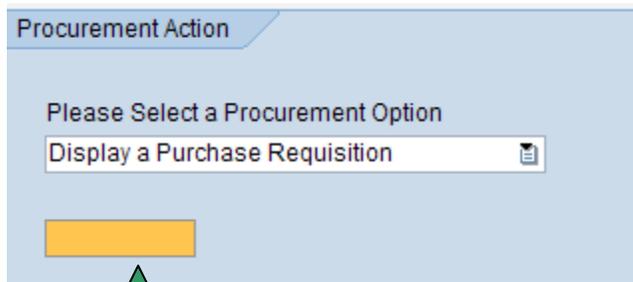
- Purchase Requisition Number

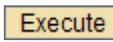
Let's Begin:

Use the following portal path to begin this transaction

- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

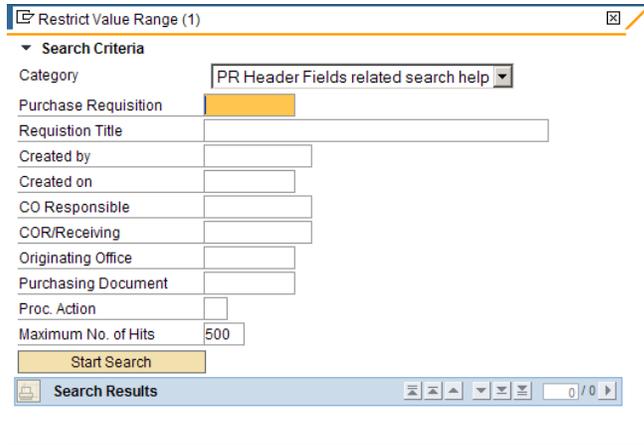
- 1) Click on  to display the procurement options. Choose **Display A Purchase Requisition**.



There are two ways to find a PR that you want to display. One method is to type the purchase requisition number directly into the text field below **Display a Purchase Requisition** on the **Procurement Type Options Screen** and click  to display your PR.

The other method, if you do not know the PR number, is to perform a search. To search for an existing purchase requisition to display, follow the steps below.

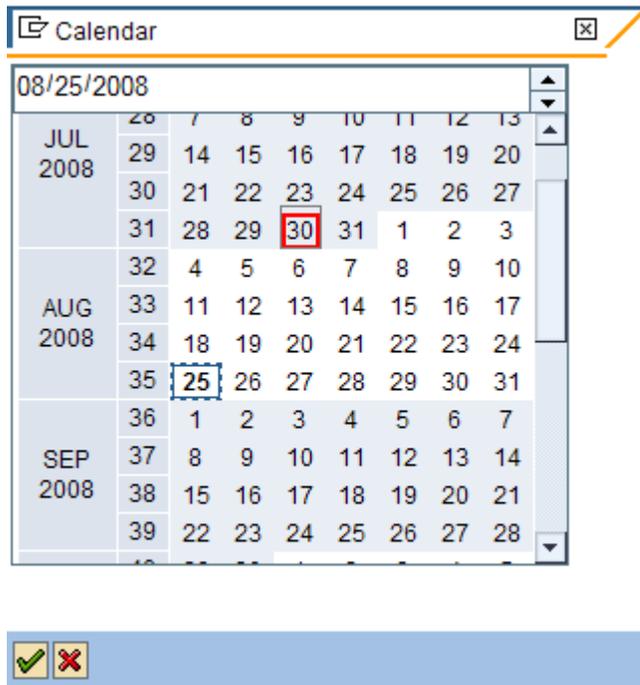
2) Click in the text box at the bottom of the **Procurement Types Options screen** to reveal the dropdown menu icon,  and click on it to go to the search screen.




There are several fields available to narrow your search options. In this example we will search using the **Created on** field, but may use any of the fields; the search process is the same.

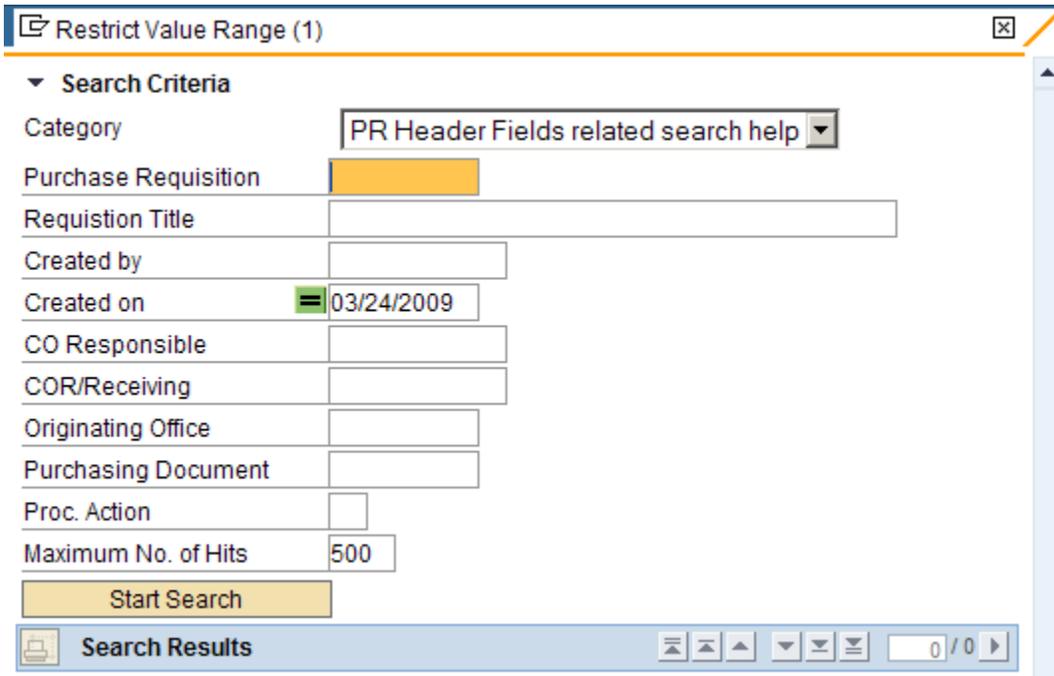
3) Click in the **Created On field to reveal** the dropdown box ; then click on the dropdown icon to open the calendar.

4) Select the date on which the **Purchase Requisition** you want to display was created and click .



08/25/2008		28	7	8	9	10	11	12	13
JUL 2008	29	14	15	16	17	18	19	20	
	30	21	22	23	24	25	26	27	
	31	28	29	30	31	1	2	3	
		32	4	5	6	7	8	9	10
AUG 2008	33	11	12	13	14	15	16	17	
	34	18	19	20	21	22	23	24	
	35	25	26	27	28	29	30	31	
SEP 2008	36	1	2	3	4	5	6	7	
	37	8	9	10	11	12	13	14	
	38	15	16	17	18	19	20	21	
	39	22	23	24	25	26	27	28	

5) The date will be populated into the **Created On** field.



6) Click  to begin searching.



- 7) When your search results are returned, highlight the purchase requisition that you want to display and click  to continue.

Restrict Value Range (1)

Search Criteria

Search Results

Purchase R	Requisition Title	Created by	Created on	CO	COR	Orig Offic	Purch.Doc.
10001580	TRAINING - POST AWARD TEST	DMANCUSO	07/30/2008		ZLAQCOTRR	3000000426	

- 8) Your PR number will default into the box on the **Procurement Type Options Screen**.

Procurement Action

Please Select a Procurement Option

Display a Purchase Requisition

10001580

- 9) Click **Execute** to display your purchase requisition.

Summary Screen - Display PR 10001552 Created By DBHUPALA

Menu | Back | Cancel | System | Refresh

Header Info | Approval / Status | Header Text

PR Display

Document Type: MP PRs for Miscellaneous Obl

Purchase Requisition: 10001552

Requisition Title: E443 UT- CREATE PO- CR 16958

Adv Procurement Plan:

Requisitioner: DBHUPALA Vendor(for MOB): 20003926

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	Tot
10	LINE ITEM #10	A			1.000	EA	32,000.00	32,
20	LINE ITEM #10	A			1.000	EA	40,000.00	40,

Item Detail

Printing a Purchase Requisition

Helpful Hints:

Before you print a purchase requisition, it is important to know the following information:

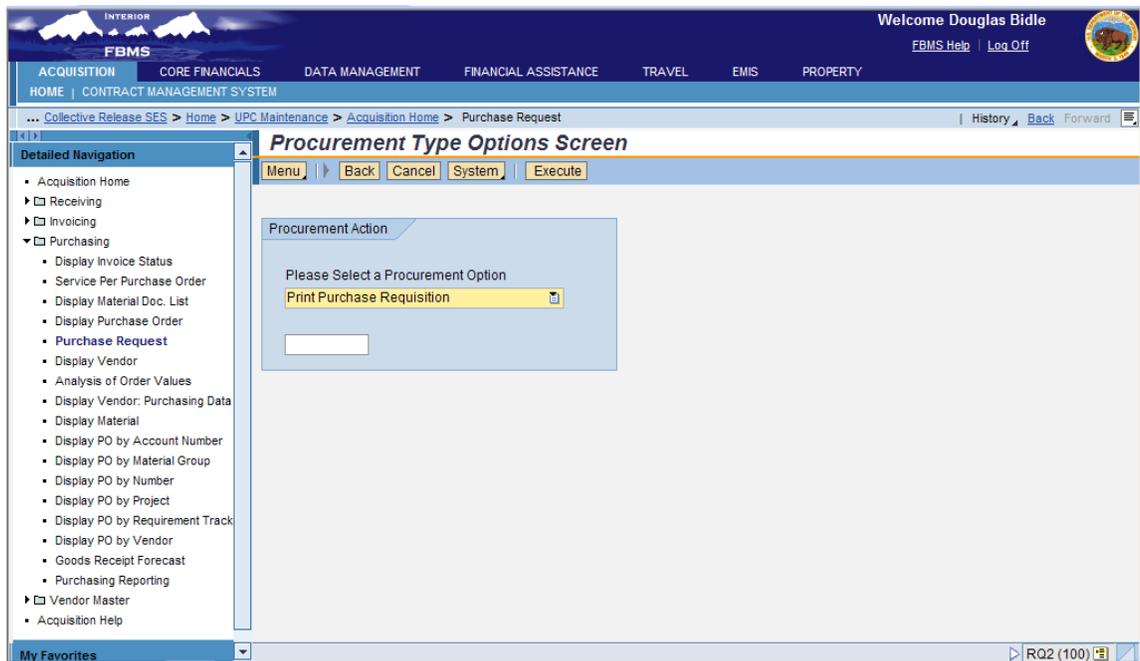
- Purchase Requisition Number

Let's Begin:

Use the following portal path to begin this transaction

- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

- 1) Click on  to display the procurement options. Choose **Print Purchase Requisition**

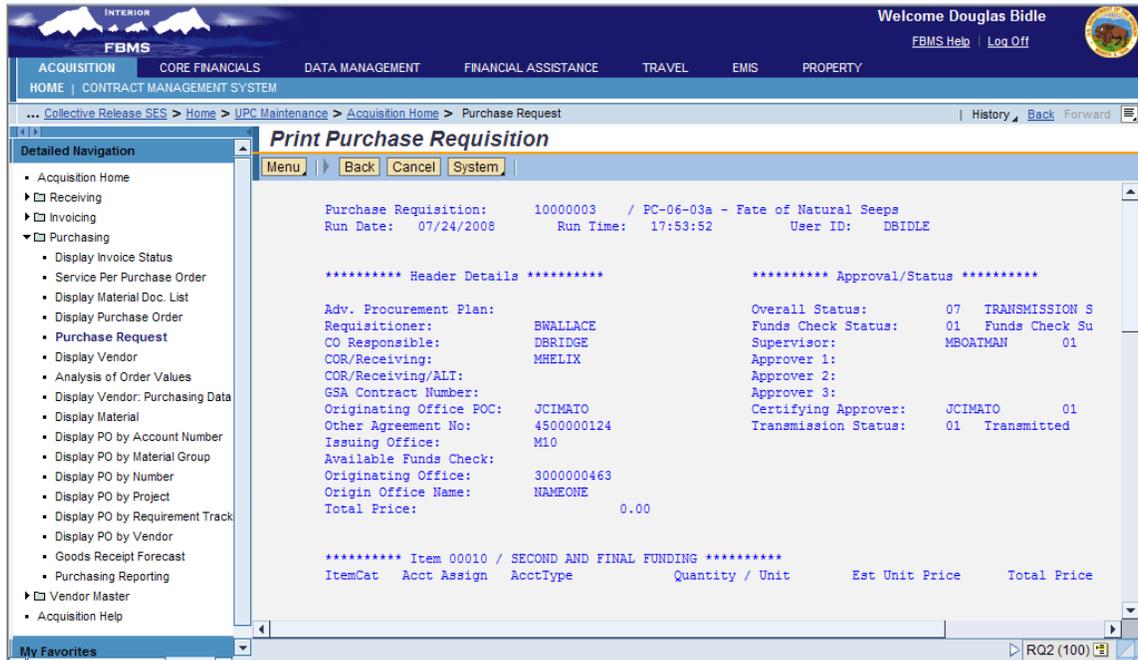


- 2) In the Blank box enter the Purchase Requisition number that you want to print.

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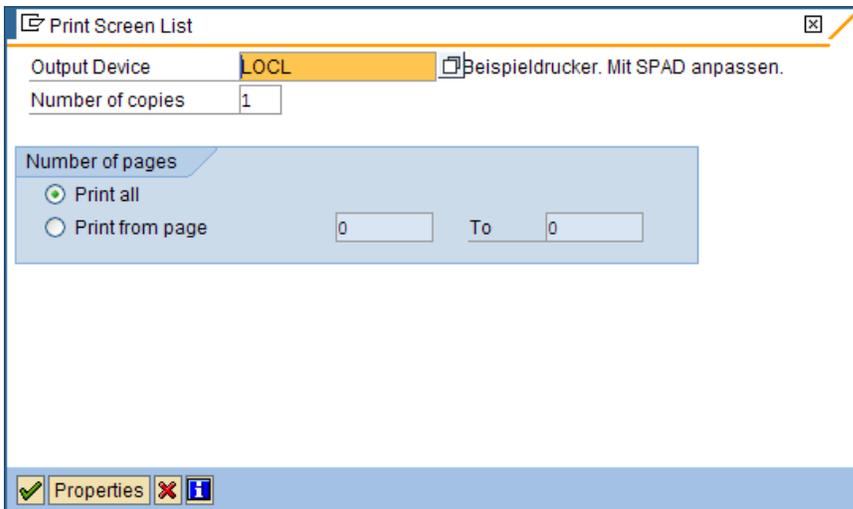


- 3) Click **Execute** the Execute button to run the transaction.



Information regarding the purchase requisition is displayed

- 4) Click **Menu** the Menu button.
- 5) Select **List > Print**.





FBMS should already be set up to use your local (default Windows) printer – LOCL will appear in the Output Device field.

- 6) Click  the Continue button to print the Purchase Requisition.

The screenshot shows the 'Print Purchase Requisition' screen in the FBMS system. The top navigation bar includes 'ACQUISITION', 'CORE FINANCIALS', 'DATA MANAGEMENT', 'FINANCIAL ASSISTANCE', 'TRAVEL', 'EMIS', and 'PROPERTY'. The breadcrumb trail is: 'Collective Release SES > Home > UPC Maintenance > Acquisition Home > Purchase Request'. The main content area displays the following information:

Purchase Requisition: 10000003 / PC-06-03a - Fate of Natural Seeps
Run Date: 07/24/2008 Run Time: 17:53:52 User ID: DBIDLE

***** Header Details *****

Adv. Procurement Plan:		Overall Status:	07 TRANSMISSION S
Requisitioner:	BWALLACE	Funds Check Status:	01 Funds Check Su
CO Responsible:	DBRIDGE	Supervisor:	MBOATMAN 01
COR/Receiving:	MHELIX	Approver 1:	
COR/Receiving/ALI:		Approver 2:	
GSA Contract Number:		Approver 3:	
Originating Office POC:	JCIMATO	Certifying Approver:	JCIMATO 01
Other Agreement No:	4500000124	Transmission Status:	01 Transmitted
Issuing Office:	M10		
Available Funds Check:			
Originating Office:	3000000463		
Origin Office Name:	NAMEONE		
Total Price:	0.00		

***** Item 00010 / SECOND AND FINAL FUNDING *****

ItemCat	Acct Assign	AcctType	Quantity / Unit	Est Unit Price	Total Price
---------	-------------	----------	-----------------	----------------	-------------

At the bottom of the screen, a status bar shows: 'Spool request (number 0000013334) sent to SAP printer LOCL' and 'RQ2 (100)'.

- 7) Click  the Back button to exit the transaction.



Pre-award Changes to a Purchase Requisition

Topic Description

There may be times when you need to change a purchase requisition you created prior to it being awarded. The types of changes you may need to make include the following:

- Add or Delete a line item
- Change data for line items – including quantity, price or UPC codes
- Change accounting or delivery information
- Change account assignment and add or remove text
- Add or delete an attachment
- Remove Subject to Availability of funds indicator (STA)

To make a preaward change, the PR must have been approved and submitted to the FBMS Contract Management system, but not yet awarded.

Helpful Hints:

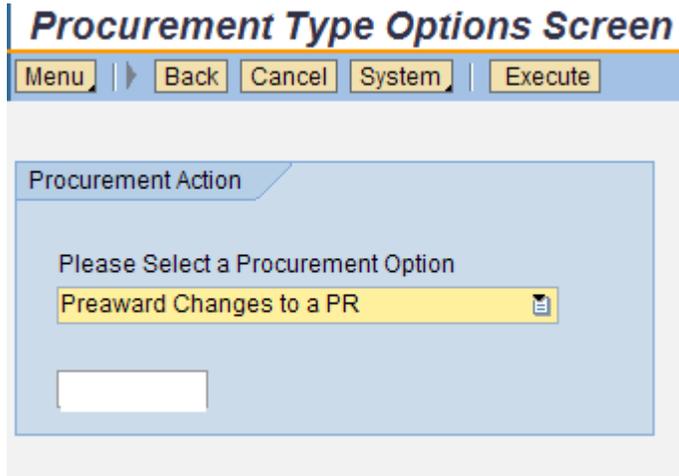
Before you begin a pre-award purchase requisition change it is important to know the following information:

- Purchase Requisition Number

Let's Begin:

You will use the following portal path to begin all types of pre-award changes to a PR:

- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.



- 1) Click the **Drop down menu** icon  and select **Preaward Changes to a PR**.
- 2) Type the **Purchase Requisition Number** into the **Text Box** below.
- 2) Click **Execute** to take you to the **Summary Screen – Pre-Award Changes**.

From this point on, you can change information just as you would if you were creating a new PR as described in this document and hold or submit the revised PR in the same way.

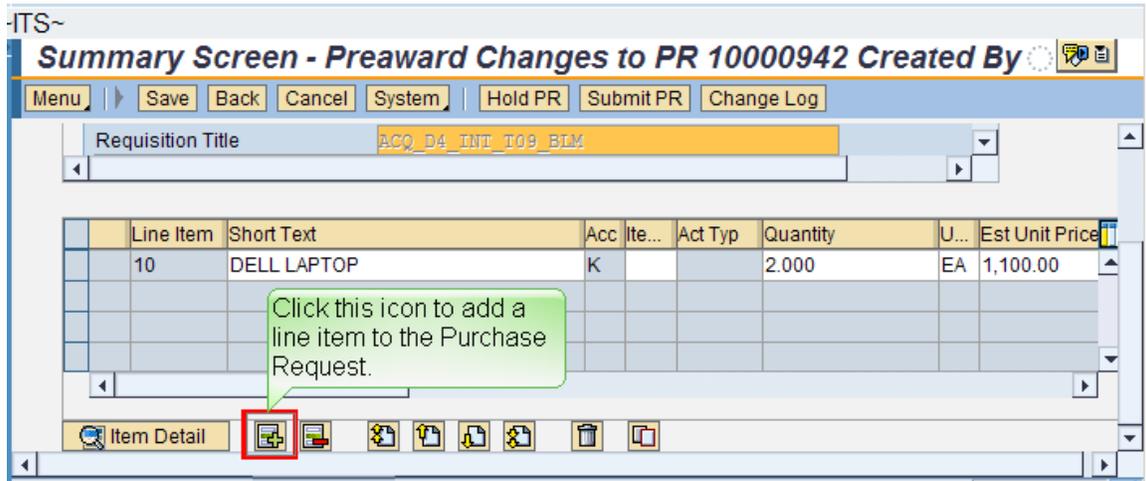
Adding a New Line Item to a PR

In order to add another line item to a PR after you have submitted it, you must do a pre-award change to that PR by following the menu path:

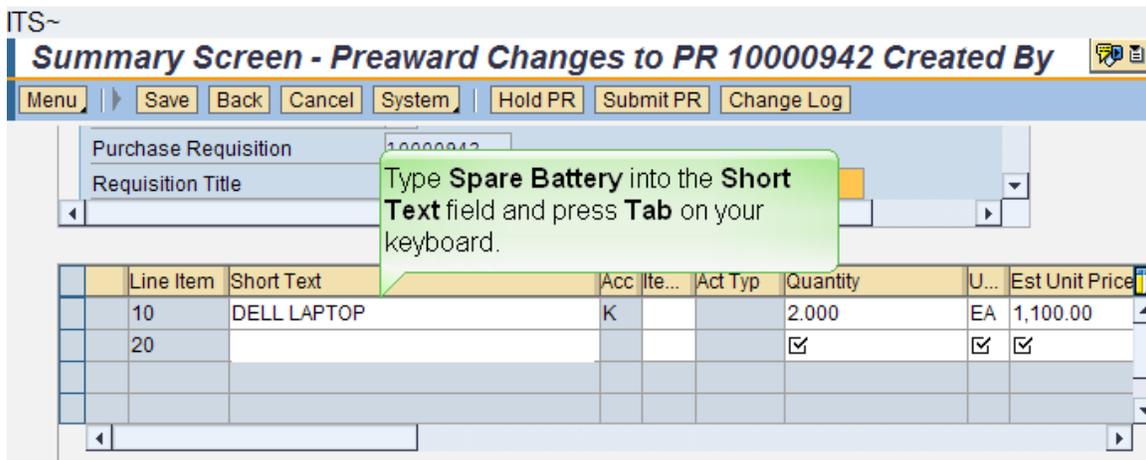
Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

The following screens depict an example of a purchase requisition that has one line item for Dell Laptops. 2 laptops were originally requested. You now want to add a Requisition for two spare batteries for these laptops. In order to add the spare batteries to this PR, you will need to add a new line item for the batteries and enter all pertinent information for that line item.

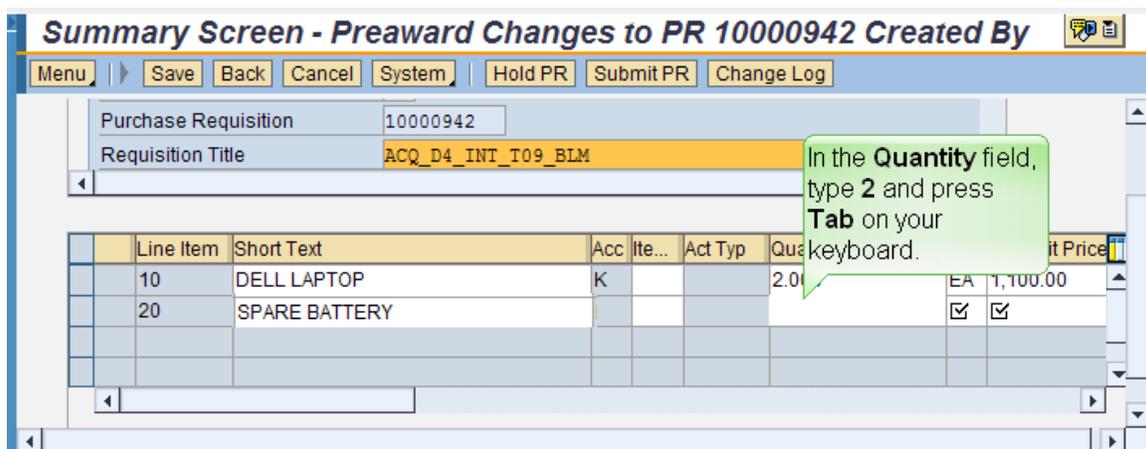
4) Click on the  button to **add a line item** to the purchase request.



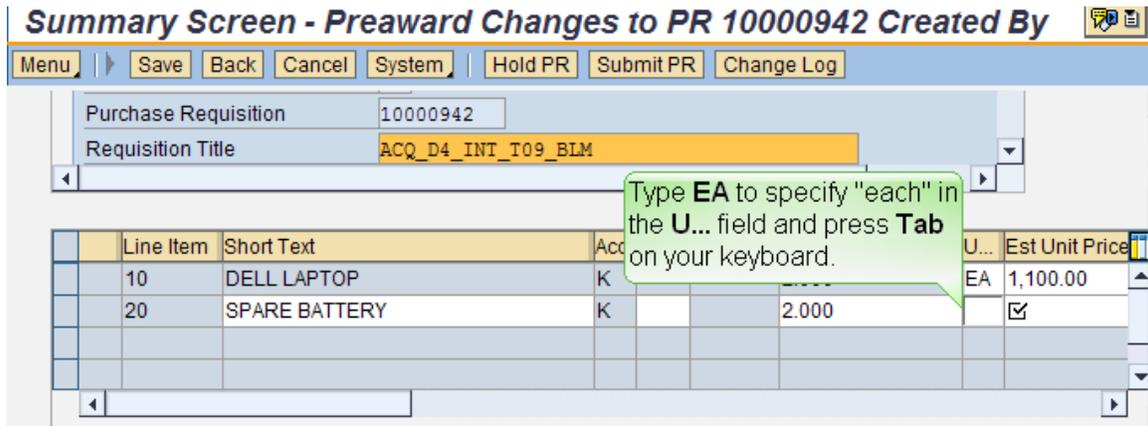
5) In the **Short Text Field**, enter the **description of the item(s)** (in this example, Spare Battery) and press **tab** on your keyboard



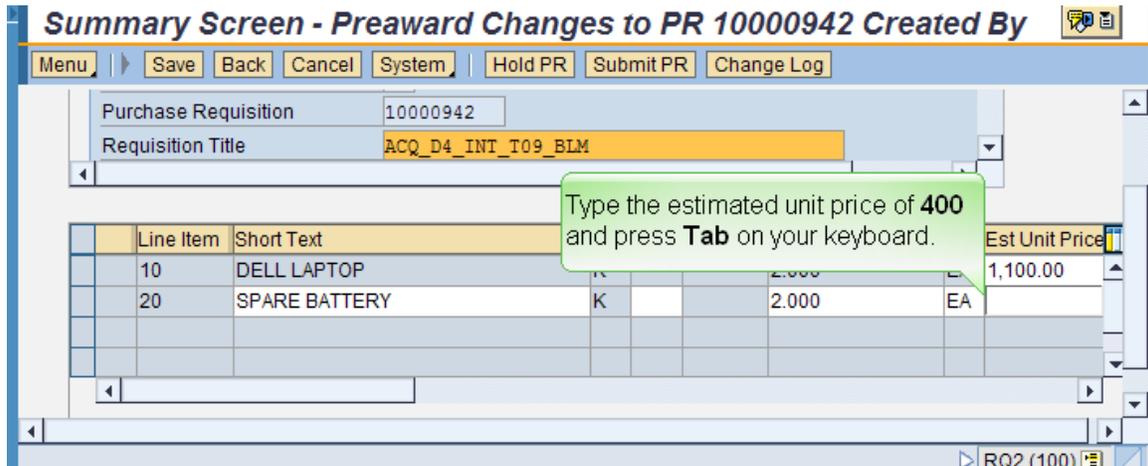
6) In the **Quantity Field** type the **quantity** needed (in this example, 2) and press **tab** on your keyboard



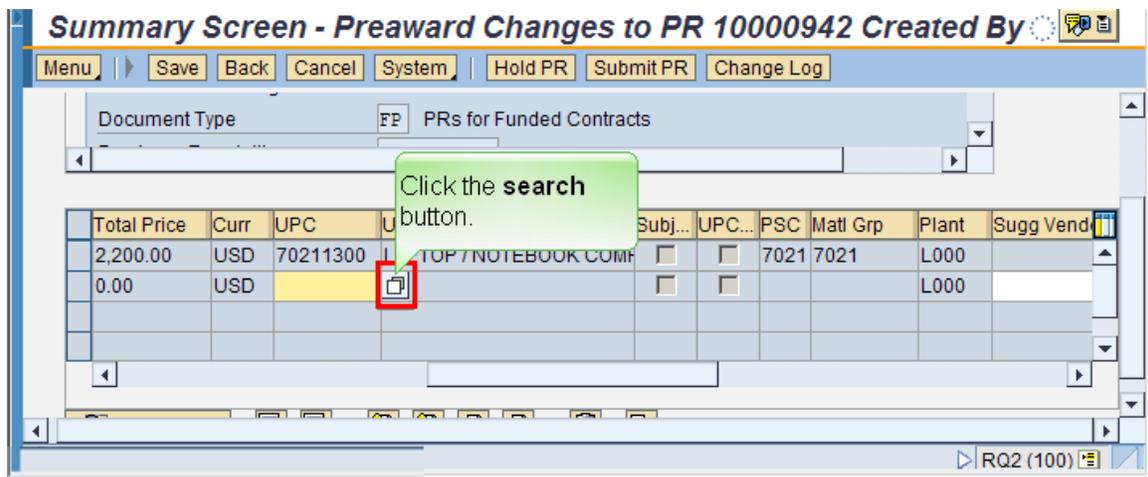
7) In the **U.. field** (Unit if Measure) type **EA** to specify “each” and press **Tab** on your keyboard.



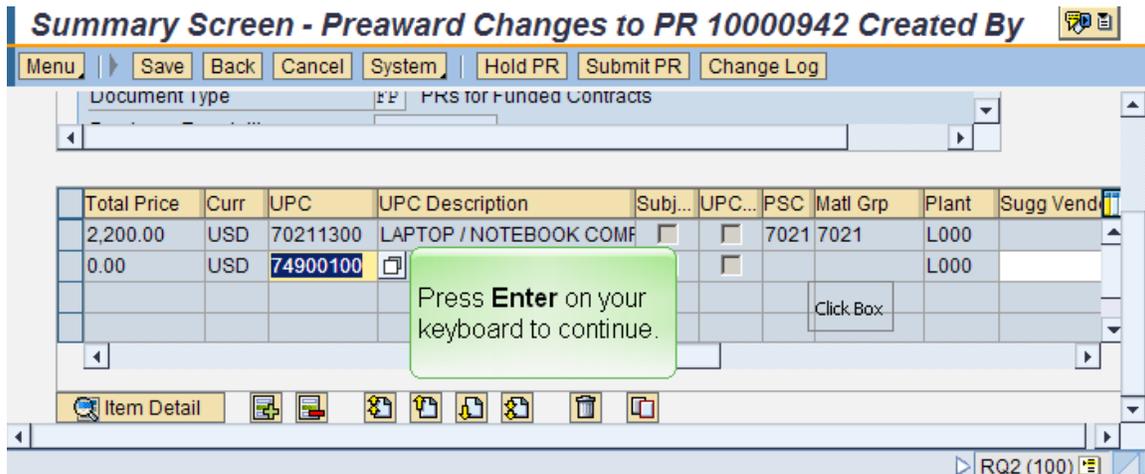
8) In the **Est. Unit Price** field type the unit price (in this example, 400) and click **Tab** on your keyboard.



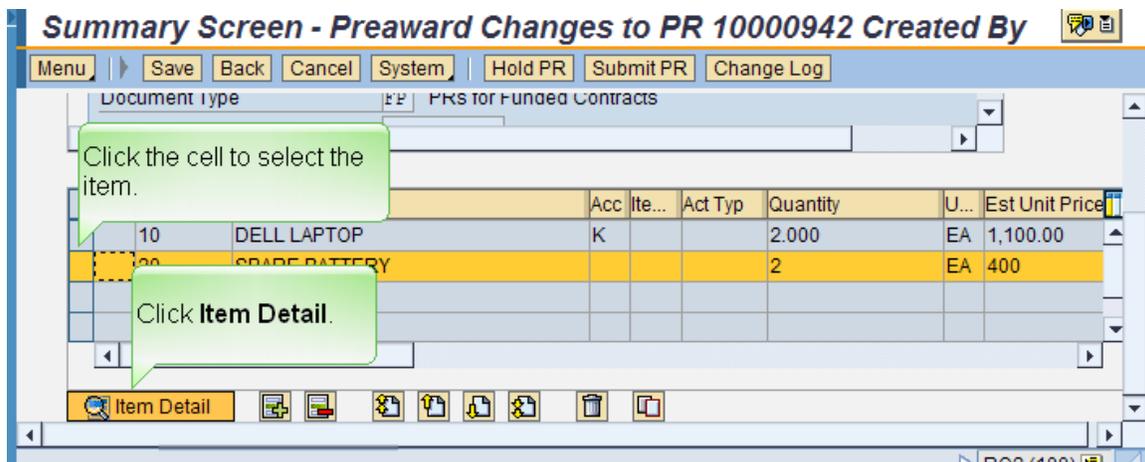
9) Enter the UPC code for the line item in the **UPC field** or search for it using the dropdown. Refer to pp. 16-18 of this document for details on searching for the UPC code.



10) Once the UPC code populates, press **Enter** on your keyboard to continue.



11) You must now enter the **Item Detail** information for the PR. Click to the left of the line item you created to highlight it, and then click .



12) Enter the accounting information details in their respective fields. For additional detail and screen shots on entering accounting information, refer to pp. 23-24 of this guide.

Cost Center – required field

Functional Area – required field

Fund – required field (for some bureaus this may automatically fill in when you enter the cost center and functional area; other bureaus require you to fill it in).

WBS – entry of the WBS is dependent on your bureau’s process

You may type these entries in directly, or use the dropdown menus to search for them.

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13) Click on the **Delivery Address** tab and enter the **Delivery Date/POP From** date by using the dropdown to select from the calendar or by entering the date manually.



Adding a line item does not change the original delivery address on the PR, although you may change it if necessary.

14) Click **Back** to return to the initial screen.

HOME | CONTRACT MANAGEMENT SYSTEM

... Display Invoice Request | Acquisition Home > Display Invoice Status > Purchase | History | Back Forward

ITS~

Accounting/ Delivery Address/ History - Preaward Changes to PR

Menu | Back | Cancel | System | UPC Override

Ordering Agency Ref. | GSA/edstrip No.

User Product Code 74900100 | G/L Account 6100.312B0 | Item Text

Material group 7490 | Acct Assgn Category K

Accounting Info | **Delivery Address** | History

Delivery Date / POP From 2/14/08 | Delivery Date / POP To

Delivery Address Code 3954085 | Address Details

Submit PR

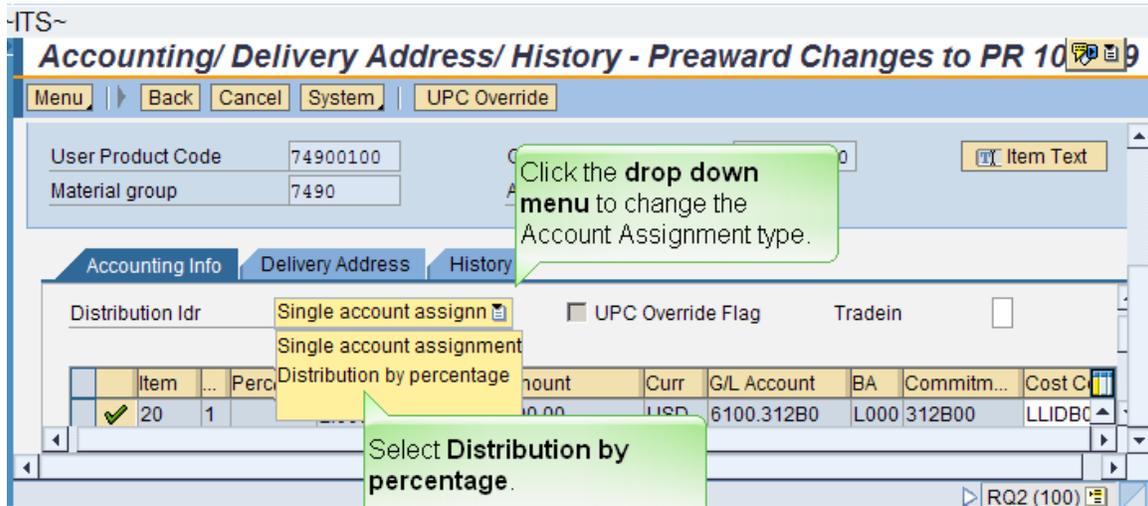
15) If you have finished with your changes, click **Submit PR**. You will be prompted to document the pre-award changes you made to the PR; follow the steps beginning on p. 50 of this manual.

Working with Multiple Account Assignments

FBMS allows you to assign the costs of items on PRs to multiple accounts. The following screens depict an example of multiple account assignments to split the costs of a line item between two accounts (50% to each), but you may choose any percentages, as long as they total 100%. The multiple account assignment only allows you to assign a percentage of the costs to multiple cost centers or functional areas, not actual amounts.

- 1) From the **Accounting Info** tab, Click the **Drop down menu** icon  in the **Distribution Idr** field and select **Distribution by Percentage**.

-ITS-



Accounting/ Delivery Address/ History - Preadward Changes to PR 10

Menu | Back | Cancel | System | UPC Override

User Product Code: 74900100
Material group: 7490

Accounting Info | Delivery Address | History

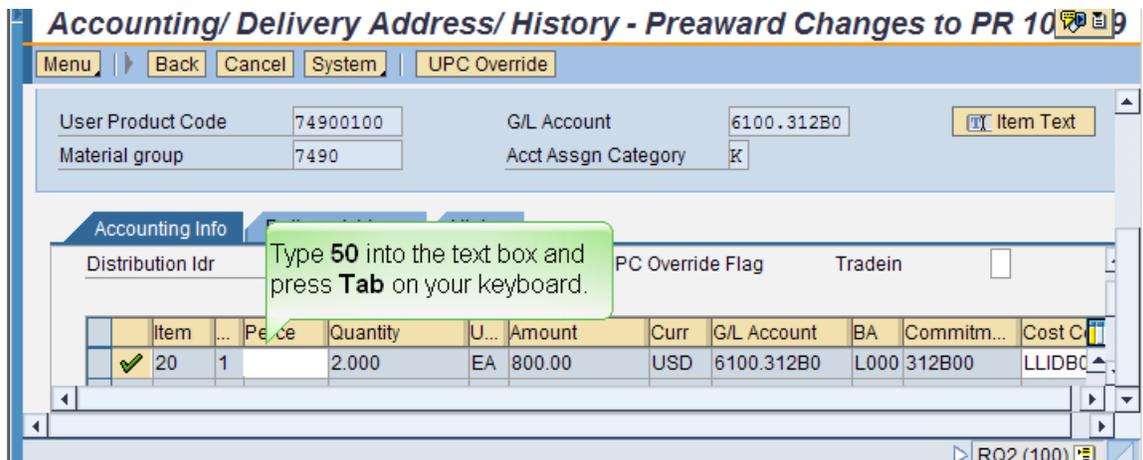
Distribution Idr: Single account assignn (dropdown menu open)
Single account assignment
Distribution by percentage

UPC Override Flag: Tradein:

Item	Perc	Quantity	U...	Amount	Curr	G/L Account	BA	Commitm...	Cost C
✓ 20	1				USD	6100.312B0	L000	312B00	LLIDBC

RQ2 (100)

- 2) In the **Perc** field, type the percentage of the cost you are assigning to the first cost center and press **Tab** on your keyboard. In the example below, the user is assigning 50% of the cost to the first cost center.



Accounting/ Delivery Address/ History - Preadward Changes to PR 10

Menu | Back | Cancel | System | UPC Override

User Product Code: 74900100
Material group: 7490

G/L Account: 6100.312B0
Acct Assgn Category: K

Accounting Info | Delivery Address | History

Distribution Idr: Single account assignn

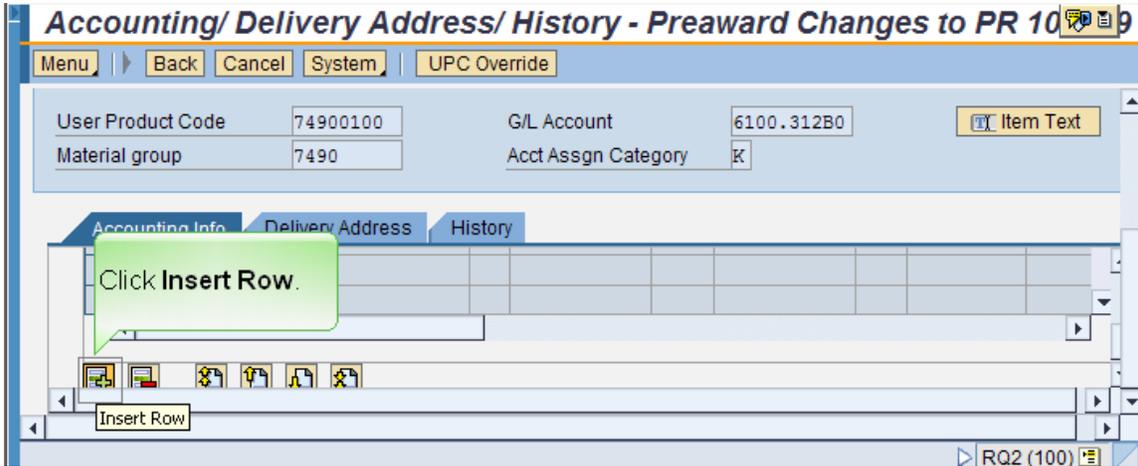
UPC Override Flag: Tradein:

Item	Perc	Quantity	U...	Amount	Curr	G/L Account	BA	Commitm...	Cost C
✓ 20	50	2.000	EA	800.00	USD	6100.312B0	L000	312B00	LLIDBC

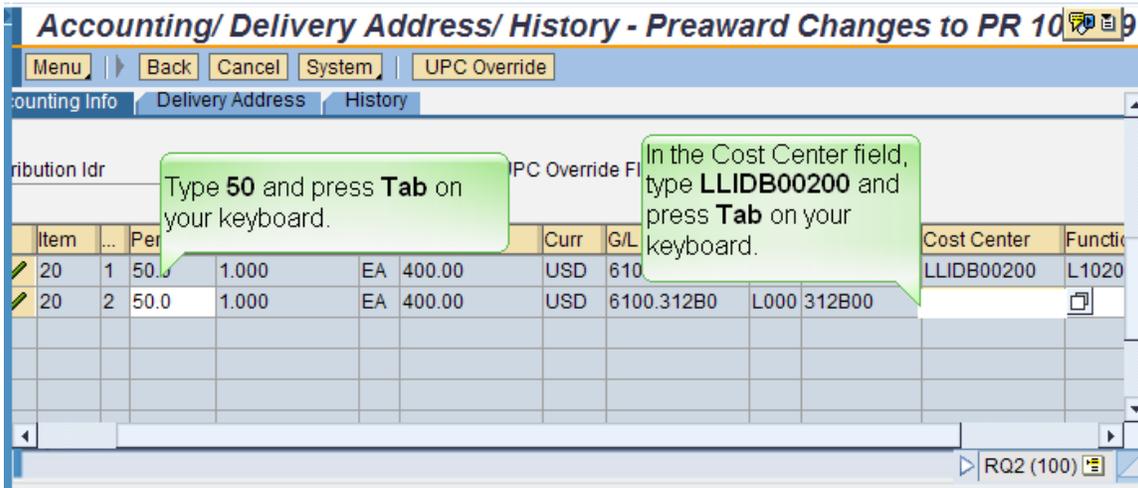
RQ2 (100)

You will need to insert another row to assign the remaining percentage.

- 3) Scroll down so you can view the icons at the bottom of the screen, and click  to insert a new row.



- 4) In the **Perc** field of the new row, type the percentage of the cost you are assigning to the next cost center. In the example below, the user is assigning the remaining 50% of the cost to another cost center.



- 5) Enter the accounting information details in their respective fields for the additional line. For additional detail and screen shots on entering accounting information, refer to pp. 23-24 of this guide.

Cost Center – required field

Functional Area – required field

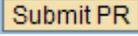
Fund – required field (for some bureaus this may automatically fill in when you enter the cost center and functional area; other bureaus require you to fill it in).

WBS – entry of the WBS is dependent on your bureau’s process

You may type these entries in directly, or use the dropdown menus to search for them.

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- 6) Validate and derive your accounting information as you normally would when creating a PR by clicking the  **Validate** button to the left of your new line.
- 7) Click  to return to the initial screen.
- 8) If you have finished with your changes, click . You will be prompted to document the pre-award changes you made to the PR; follow the steps beginning on p. 50 of this manual.

Adding an Attachment to a Purchase Request



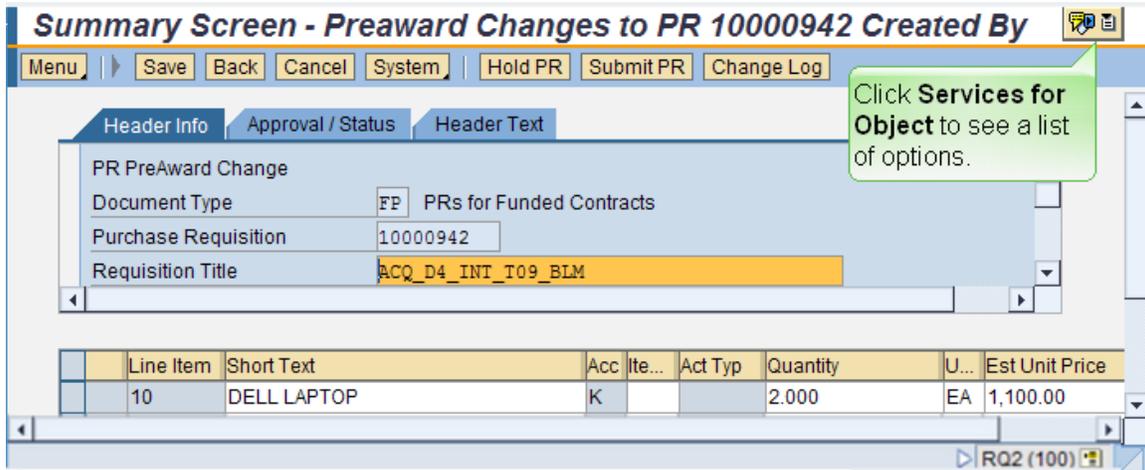
An attachment can only be added to a purchase requisition after it has been created and placed on hold or submitted. You may then do a pre-award change to a PR to add the attachment.

After creating and holding or submitting the PR, add an attachment using the following menu path:

Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** and select **Preaward Changes to a PR** from the dropdown menu on the **Procurement Type Options** screen.

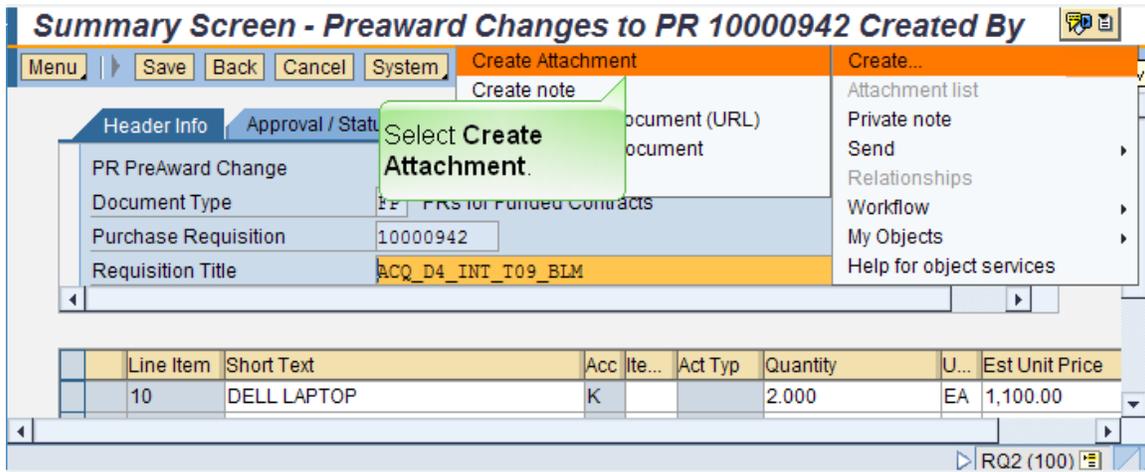
The next steps demonstrate how to add an attachment to your PR:

- 1) Click on the **Services for Object** icon  to view a list of options.



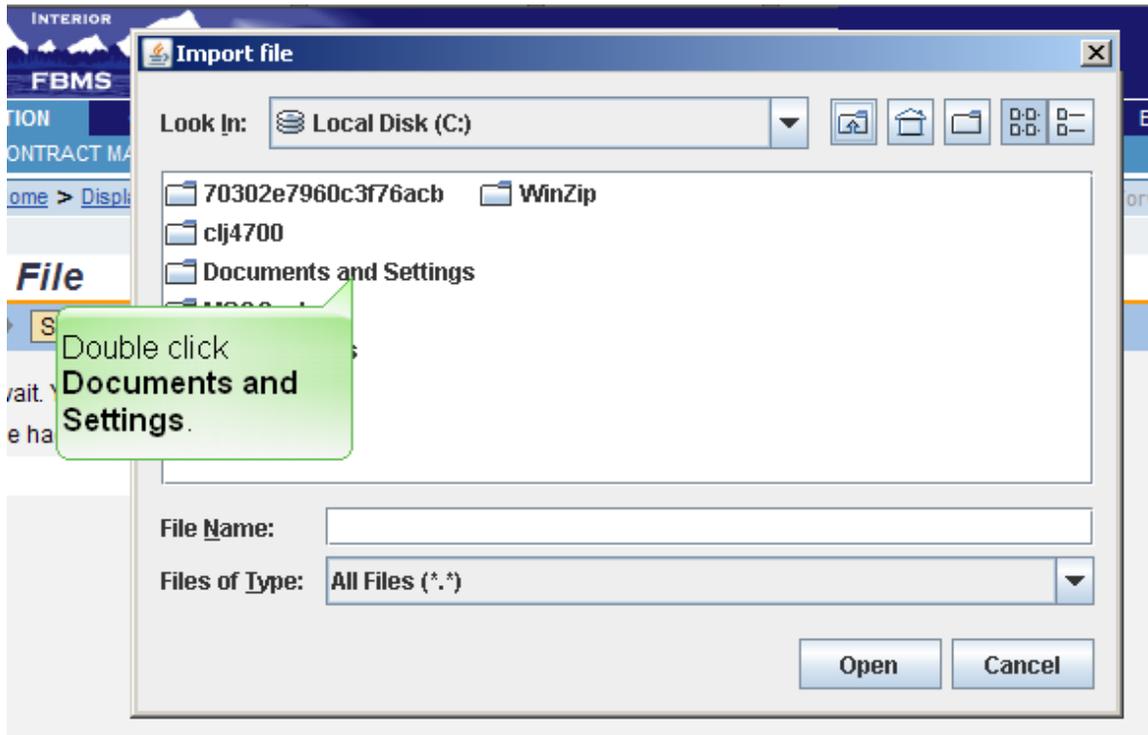
Line Item	Short Text	Acc	lte...	Act Typ	Quantity	U...	Est Unit Price
10	DELL LAPTOP	K			2.000	EA	1,100.00

- 2) Select **Create>Create Attachment**

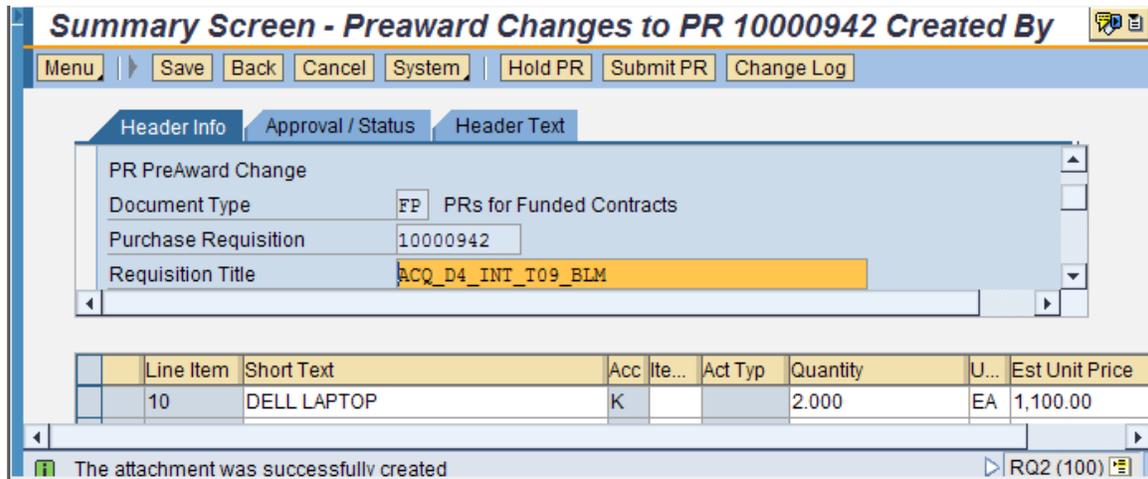


Line Item	Short Text	Acc	lte...	Act Typ	Quantity	U...	Est Unit Price
10	DELL LAPTOP	K			2.000	EA	1,100.00

3) Browse to locate your attachment, select it, and click



4) You will return to the PR Summary Screen and will receive a notification at the bottom of your screen that the attachment was created.

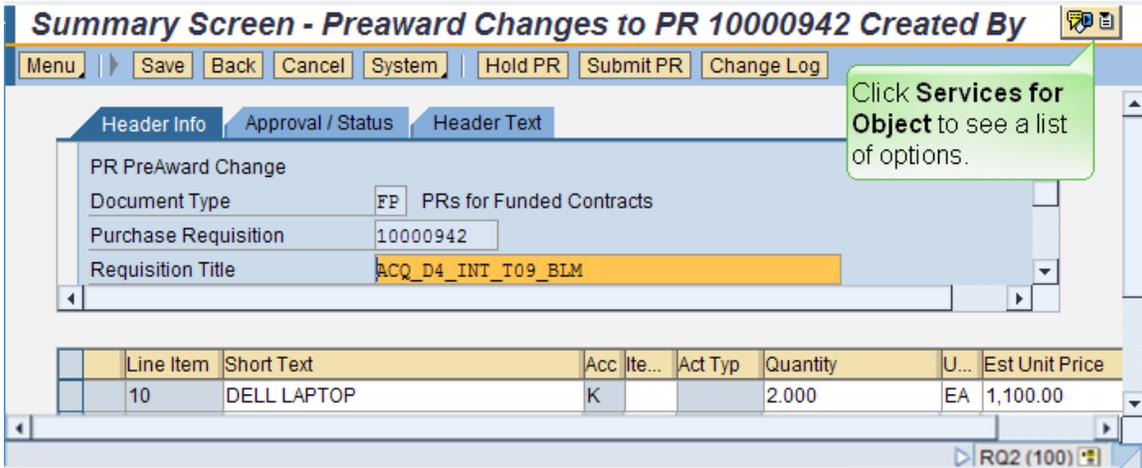


5) If you have finished with your changes, click **Submit PR**. You will be prompted to document the pre-award changes you made to the PR; follow the steps beginning on p. 50 of this manual.

Viewing Attachments on a Purchase Request

The next steps demonstrate how to view a list of all attachments to a Purchase Request.

- 1) Click on the **Services for Object** icon  to view a list of options.



Summary Screen - Preaward Changes to PR 10000942 Created By

Menu | Save | Back | Cancel | System | Hold PR | Submit PR | Change Log

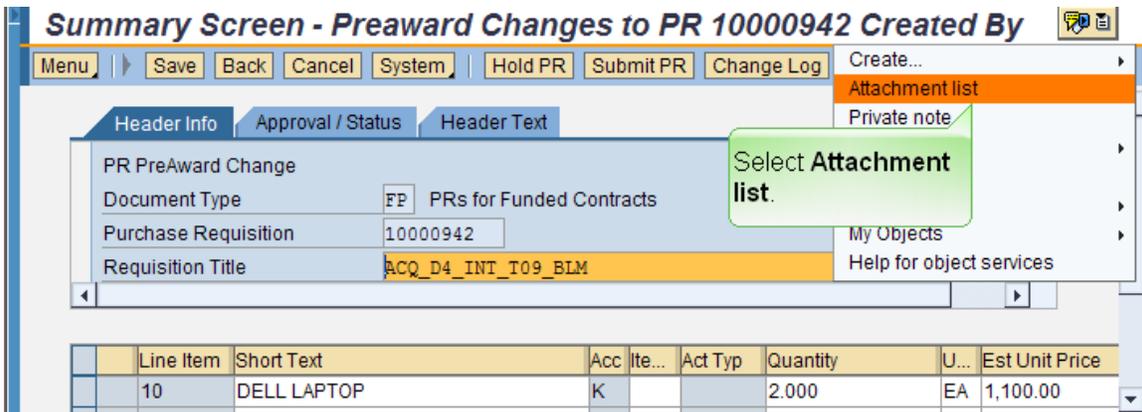
Header Info | Approval / Status | Header Text

PR PreAward Change
Document Type: FP PRs for Funded Contracts
Purchase Requisition: 10000942
Requisition Title: ACQ_D4_INT_I09_BLM

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price
10	DELL LAPTOP	K			2.000	EA	1,100.00

RQ2 (100)

- 2) Select **Attachment List**.



Summary Screen - Preaward Changes to PR 10000942 Created By

Menu | Save | Back | Cancel | System | Hold PR | Submit PR | Change Log

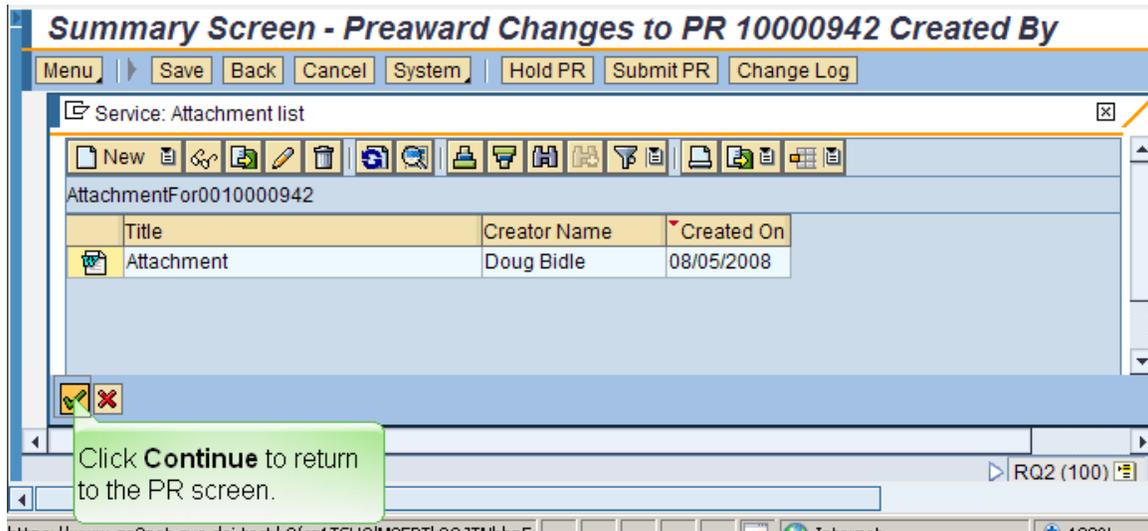
Create...
Attachment list
Private note
My Objects
Help for object services

Header Info | Approval / Status | Header Text

PR PreAward Change
Document Type: FP PRs for Funded Contracts
Purchase Requisition: 10000942
Requisition Title: ACQ_D4_INT_I09_BLM

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price
10	DELL LAPTOP	K			2.000	EA	1,100.00

3) A popup box will appear with a list of attachments on that PR.



4) Highlight the attachment you wish to view, and click  to view.



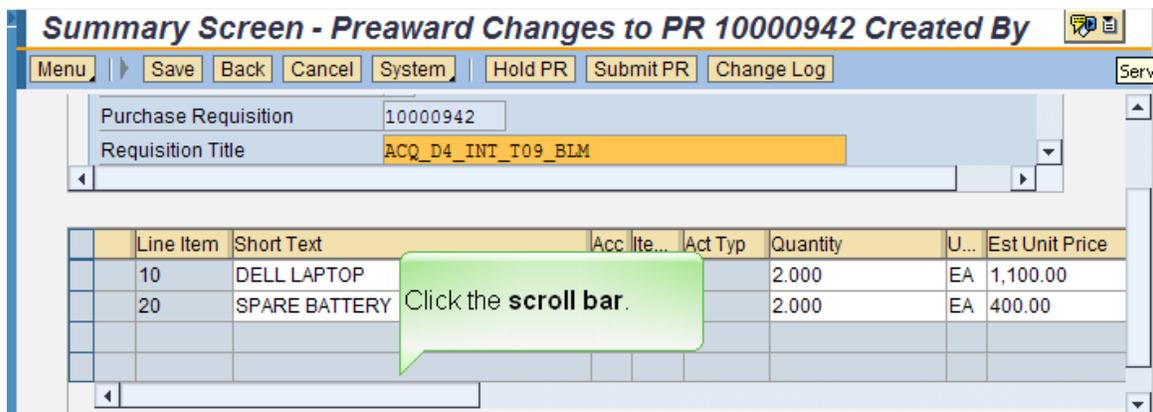
You can delete attachments from the PR by selecting the attachment and clicking  (delete). Once you submit the PR for approval you will not be able to delete any attachments.

5) Click  to continue.

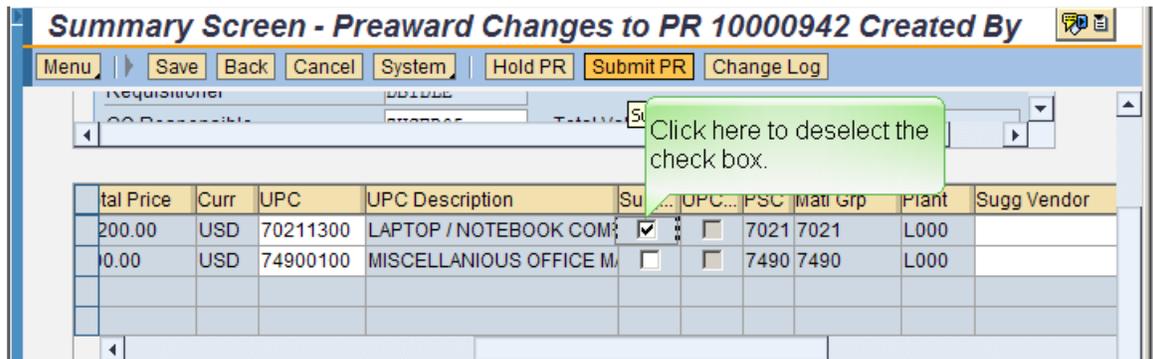
Removing Subject to Availability Indicator (STA)

If the original purchase requisition indicated that purchase of the requested item(s) was subject to the availability of funding, the **Subject to Availability Indicator (STA)** would have been checked on the appropriate line items during the creation of the purchase requisition. If funds later become available, you may wish to do a pre-award change to the PR to remove the STA indicator.

- 1) Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** and select **Preaward Changes to a PR** from the dropdown menu on the **Procurement Type Options** screen.
- 2) Scroll to the right over to the **Subj.** column



- 3) Remove the checkmark in the **Subj.** column by clicking on it.



- 3) Click **Submit PR**.



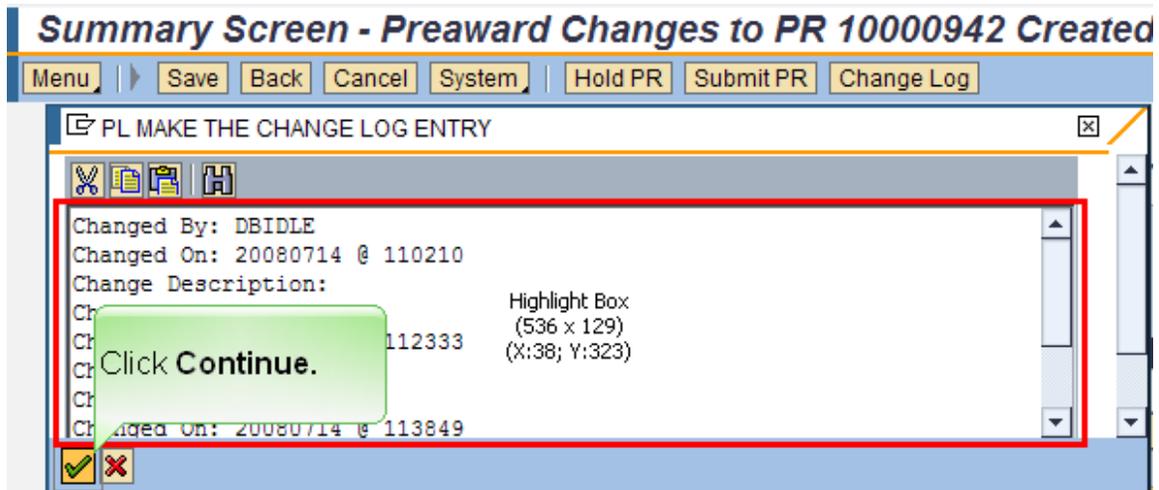
Clicking **Save** will save the PR but will not submit it. You must click **Submit PR** in order to submit the PR for approval.

- 4) If you have finished with your changes, click **Submit PR**. You will be prompted to document the pre-award changes you made to the PR; follow the steps beginning on p. 50 of this manual.

Documenting Pre-Award Changes on the PR

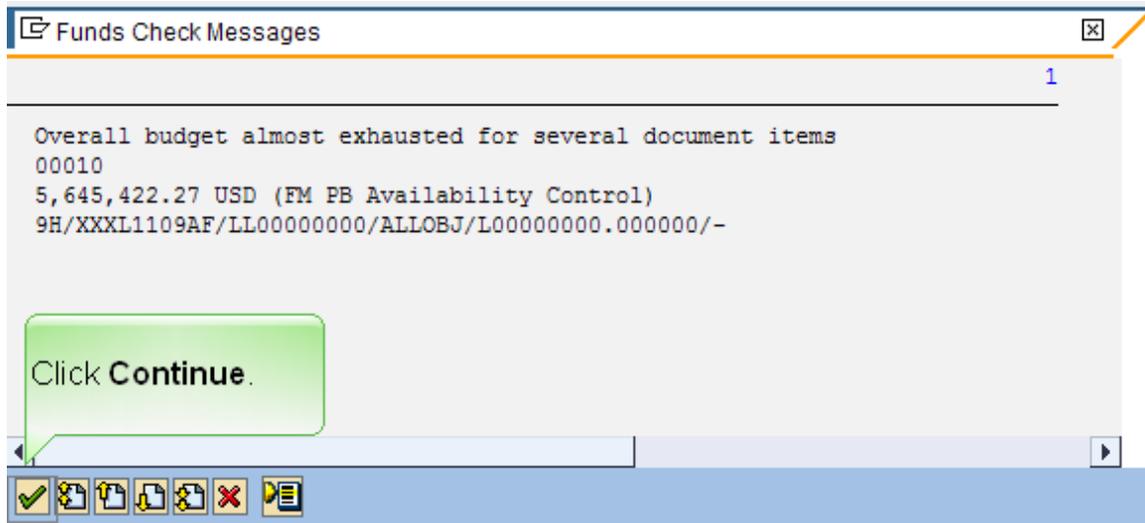
Once you have finished with your pre-award changes to the PR and click **Submit PR**, you will be prompted to document the changes you made.

- 1) Upon clicking **Submit PR**, the **Summary Screen Preadward Changes to PR** screen will display. In the change log entry, enter the changes you made to the PR.



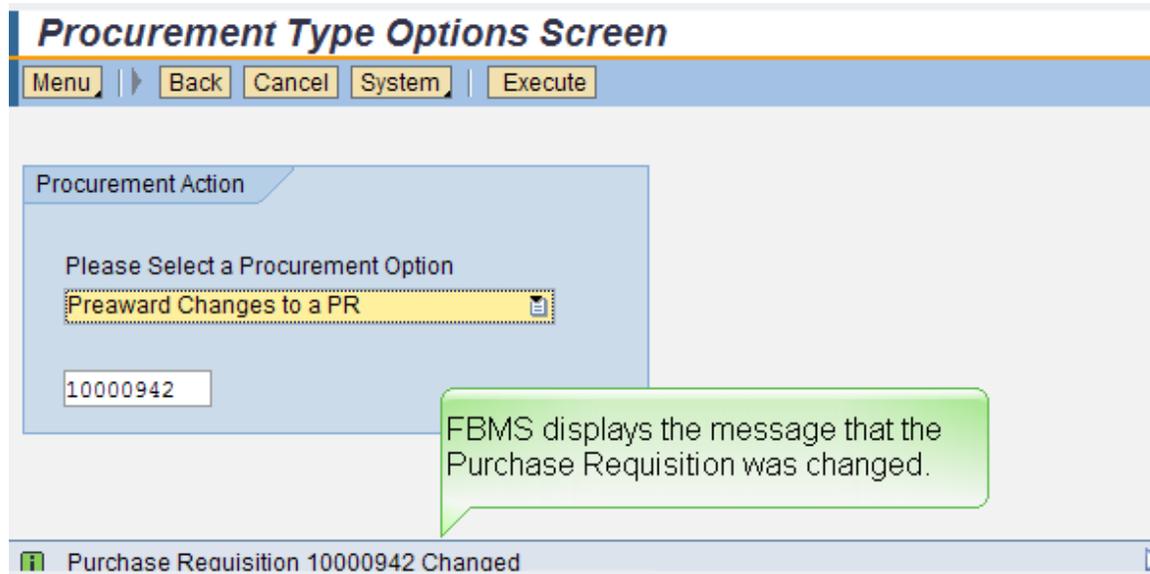
- 2) Click  to continue. A **Funds Check Message** will display.

- 3) Click  again to continue.





4) A system message will display at the bottom of your screen indicating that the PR was changed.





Post-Award Changes to a Purchase Requisition

Topic Description

Once a purchase order has been awarded to a vendor, you may no longer make a change to the original purchase requisition using the process for pre-award changes; there is a separate process for post-award changes. This topic demonstrates how you can change awarded items using the PR for post-award changes. A typical scenario for a post-award change would be to increase the prices or quantities of items.



Price and quantity increases are the only data that you can amend on an awarded item without first de-obligating it. If you have other post-award changes, such as a decrease in price or quantity or cancellation of an item, you should follow the process outlined in the De-obligation of Awards Purchase Requisition section of this document, beginning on p. 61.

Helpful Hints:

Before you begin a post-award purchase requisition change it is important to know the following information:

- Purchase Order Number from FBMS Contract Management System

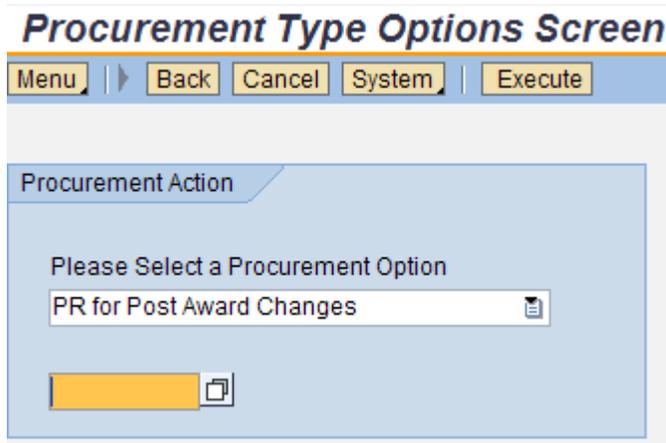
To make a post-award change, you must create a new purchase requisition by copying the line items from your original purchase requisition. These changes will be identified on the new PR. Both the original PR and the new PR will be linked to the purchase order generated in the FBMS contract management system.

Let's Begin:

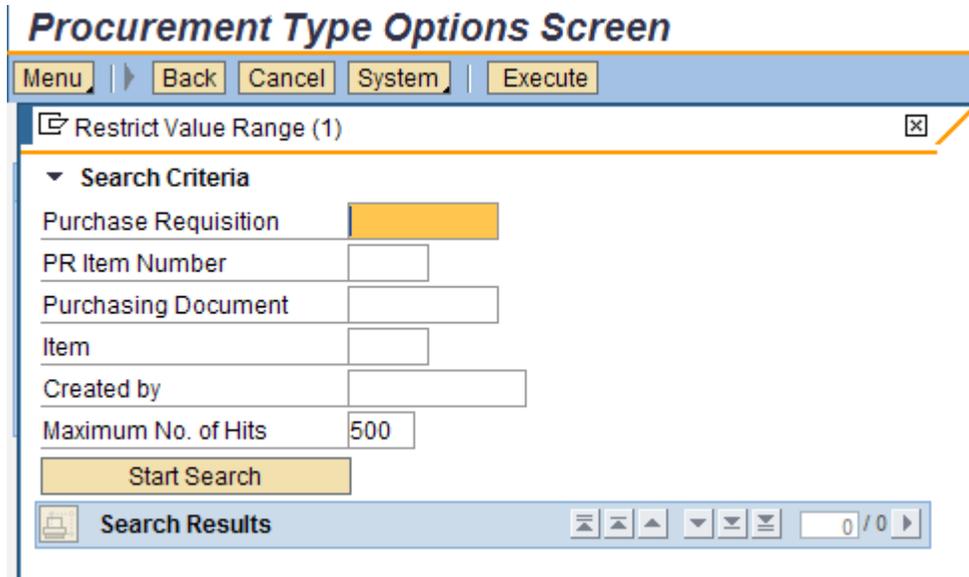
The following example illustrates the procedure for increasing the price or quantity of an awarded item using a PR for post-award changes.

You will use the following portal path to begin all types of post-award changes to a PR:

- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

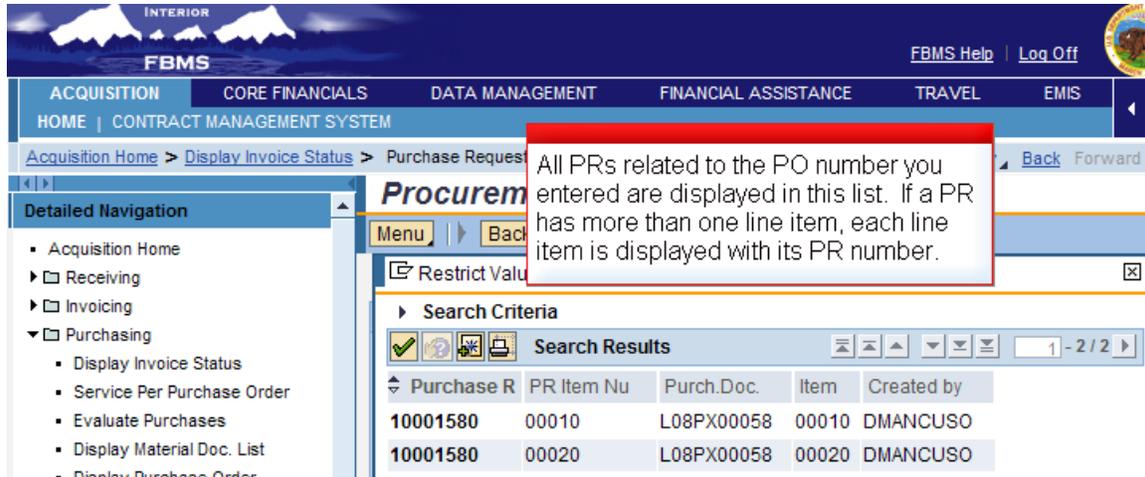


- 1) Click the **Drop down menu** icon  and select **PR for Post Award Changes**.
- 2) Click in the text box below to reveal the **Drop down menu** icon . Click this icon to reveal the search screen.
- 3) In the **Purchasing Document** field of the search screen, type the **Purchase Order Number** generated from the FBMS Contract Management System

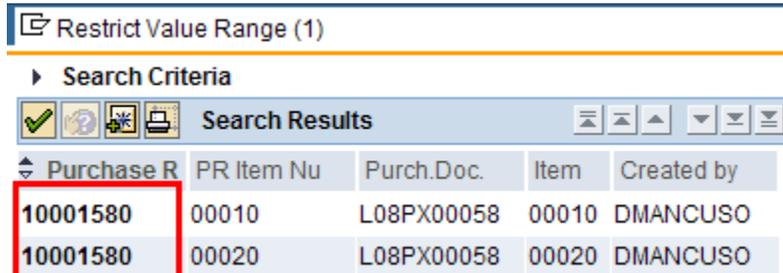


- 3) Click  .

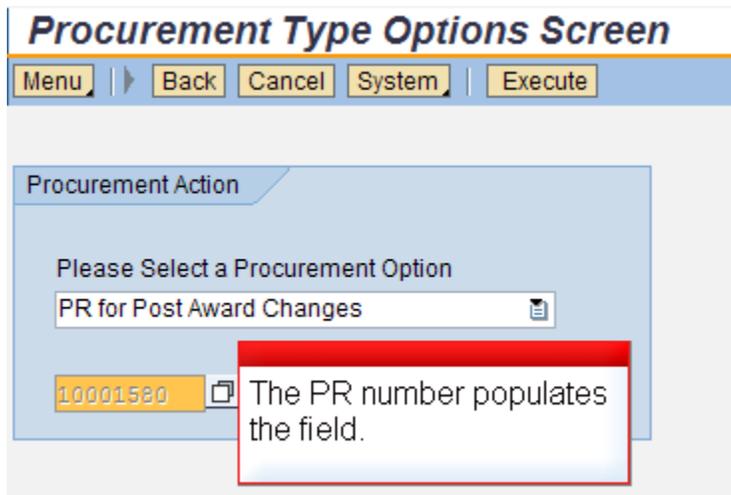
All Purchase Requisitions related to the PO number you entered will be displayed in a list. If a PR has more than one line item, each line is displayed with its PR number. In the example below, you can see two line items on one PR.



- 4) Double click on the **PR number** that you wish to display. If the PR is listed more than once (because it has more than one line item), you may select either number that is displayed.



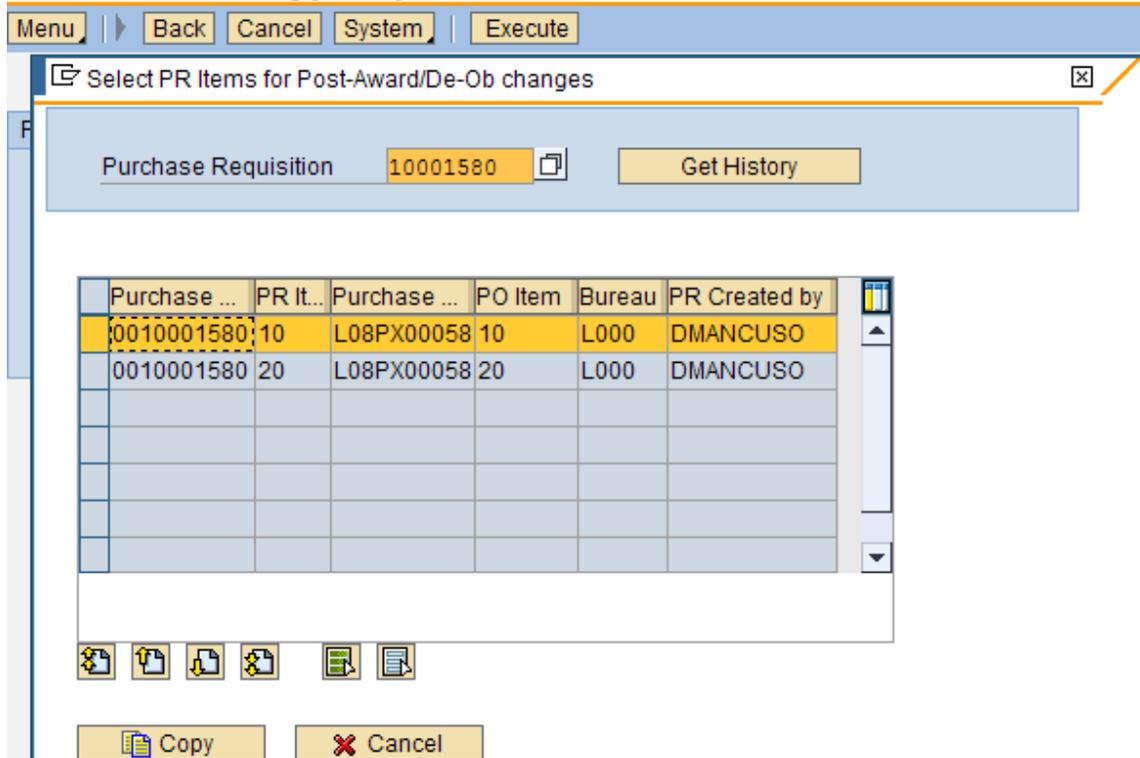
- 6) The PR number you selected will populate the field on the **Procurement Type Options** screen. Click **Execute** to proceed.



All items on the awarded PR will display. You will need to select the items you are changing (the line item associated with the price or quantity increase), then copy the selection into the new PR that you will create.

- 7) Click in the box to the left of the line item you wish to change to highlight that line.
- 8) Click  Copy.

Procurement Type Options Screen



Menu | Back Cancel System | Execute

Select PR Items for Post-Award/De-Ob changes

Purchase Requisition 10001580  Get History

Purchase ...	PR It...	Purchase ...	PO Item	Bureau	PR Created by
0010001580	10	L08PX00058	10	L000	DMANCUSO
0010001580	20	L08PX00058	20	L000	DMANCUSO

 Copy  Cancel

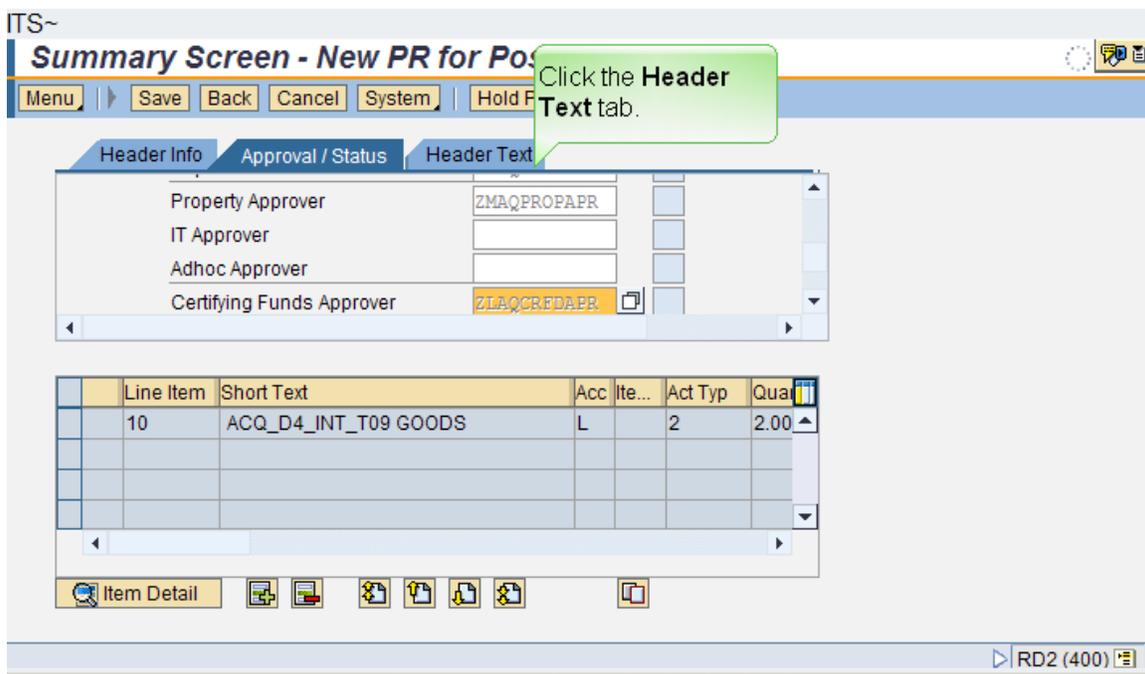


The **Summary Screen – New PR for Post award screen** will display. This will show your new PR with your copied line item along with all of its line item details (accounting information and delivery information).

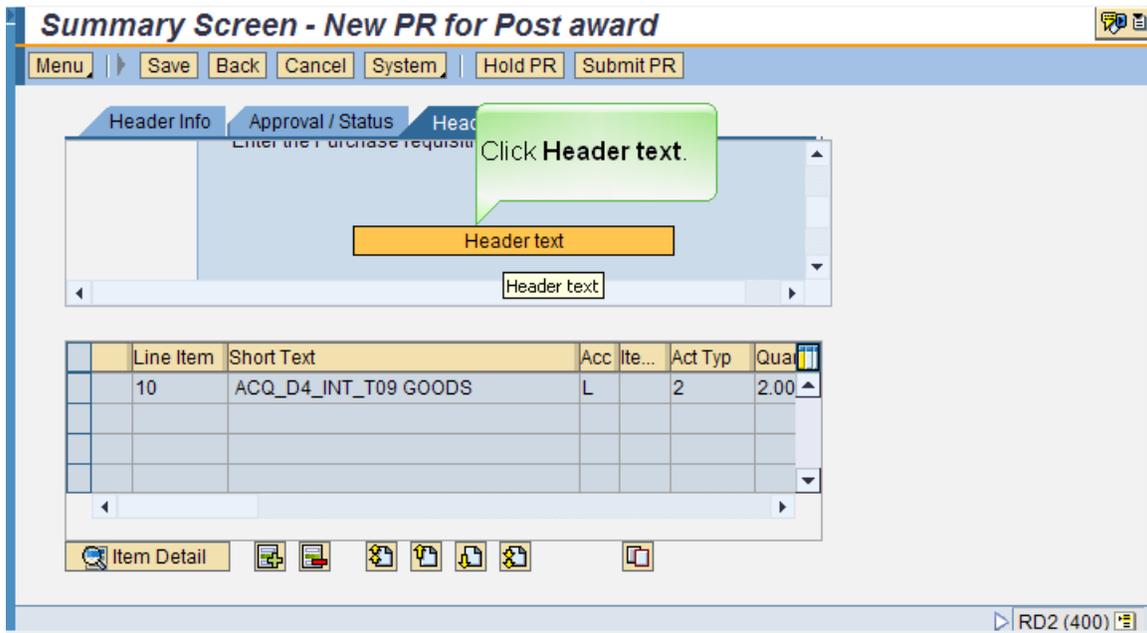
9) Click on the **Approval / Status** tab. Follow the same steps to add approvers to your new PR that you follow when creating a new PR (detailed on pp. 11-13 of this manual).

Once you have all required approvers identified, you will need to enter and describe what changes are being made to the PR in the header text. This information will be used to notify the contracting officer of what changes are being requested.

10) Click the **Header Text** tab.



11) Click 



Summary Screen - New PR for Post award

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Head

Enter the purchase requisition

Click Header text.

Header text

Line Item	Short Text	Acc	Ite...	Act Typ	Qua
10	ACQ_D4_INT_T09 GOODS	L		2	2.00

Item Detail

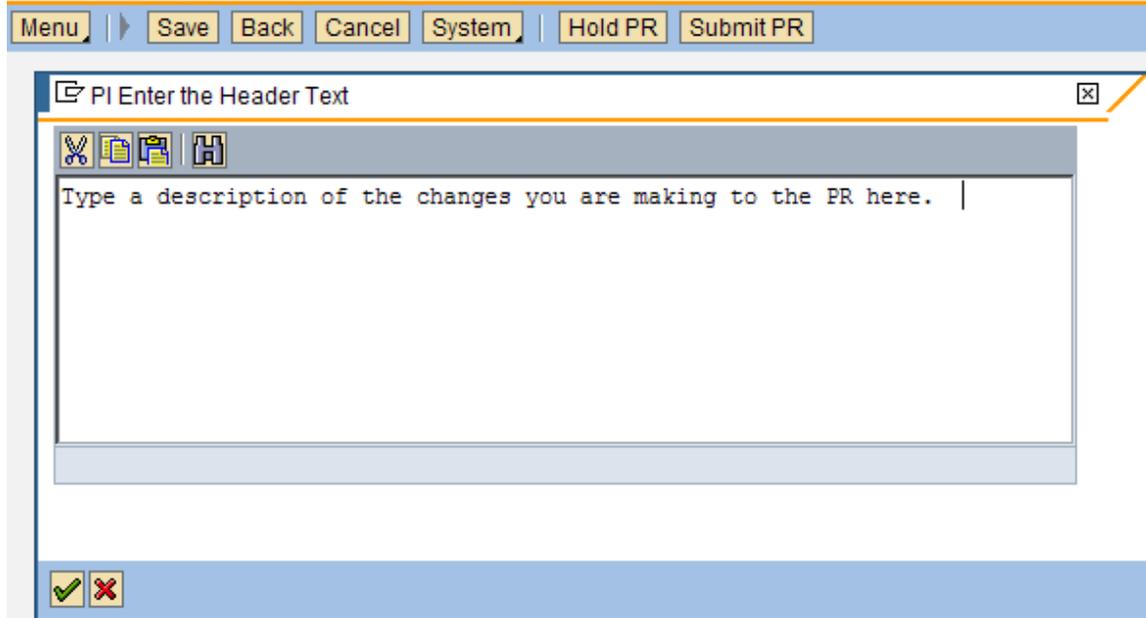
RD2 (400)

12) Enter the **Header text** describing the changes you are making on the PR, then click



to continue.

Summary Screen - New PR for Post award

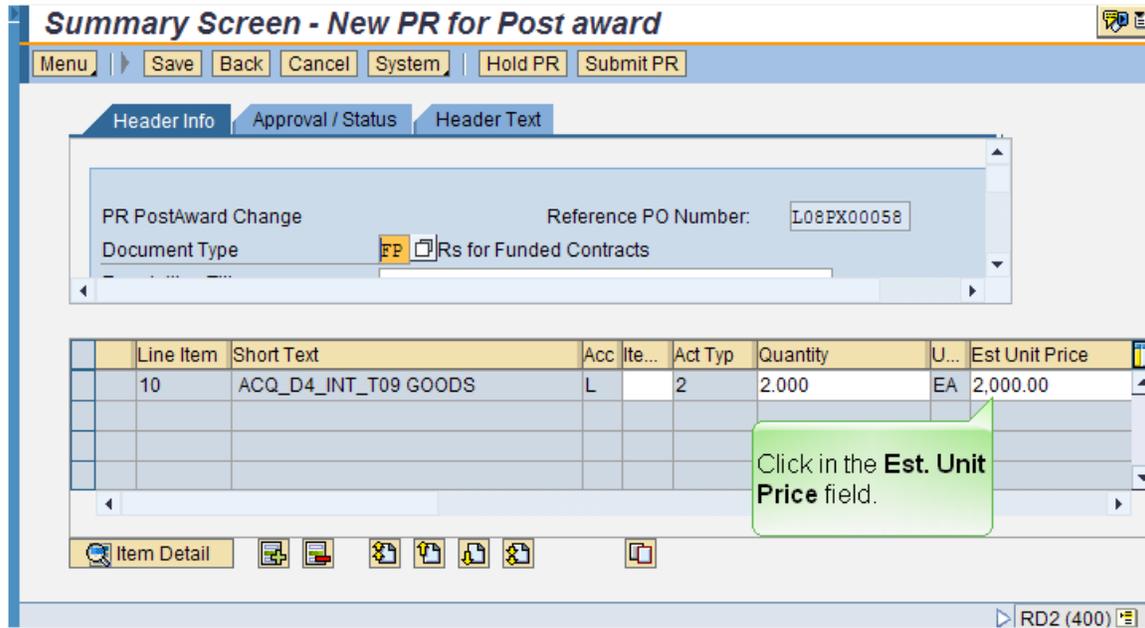


Next, you will make the changes you need to either the price or the quantity of the item (or both). In the example screens below, the unit price on the original PR was \$2000.00. In this example, you want to increase the unit price by \$100.00.

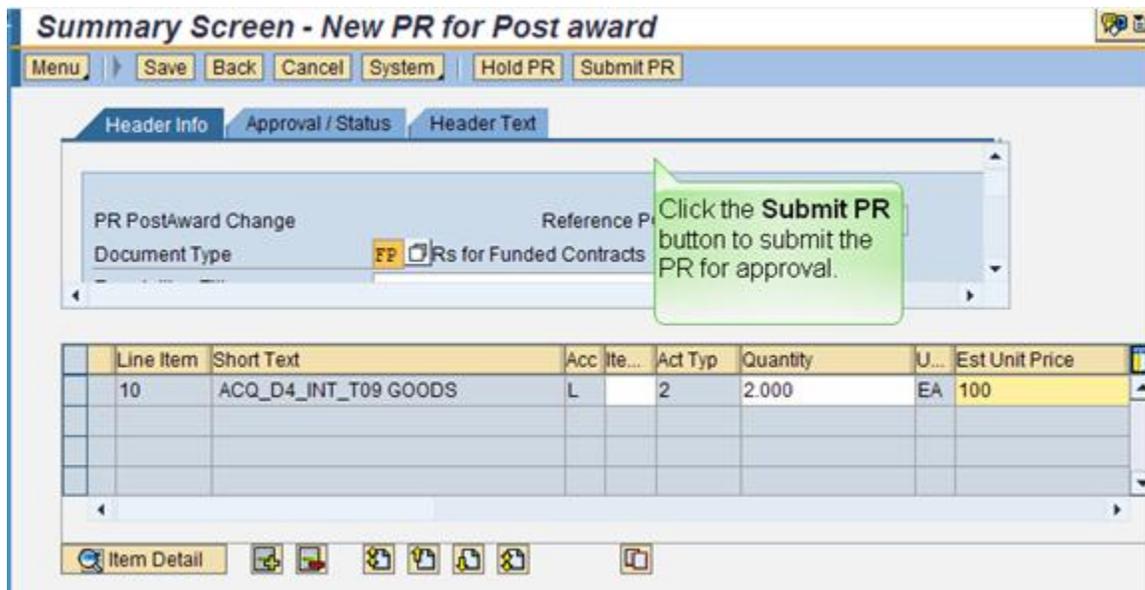


Since both the original PR and the new PR will be linked to the purchase order generated in the FBMS contract management system, you should only enter the additional amount of the increase on this new PR, not the total price. To do this you will need to delete the original price (\$2000.00) and enter the price increase (\$100.00).

- Click in the **Est. Unit Price** field to highlight the field. Delete the original price and enter your price increase (the difference between the old and new prices, in this example, 100.00), then hit **Enter** on your keyboard to populate the field.



- Follow the same procedure if you need to change the **quantity**. Click in the **Quantity** field, delete the original quantity, enter your new quantity, then hit **Enter** on your keyboard to populate the field.
- Once your changes are complete, click **Submit PR**. You will return to the Procurement Types screen and your PR will now go through the normal approval process.





If submission of your PR is successful, you will receive a message at the bottom of the screen verifying that the PR has been created. Write down the Purchase Requisition number for future reference.

The screenshot shows a web application window titled "Procurement Type Options Screen". At the top, there is a navigation bar with buttons for "Menu", "Back", "Cancel", "System", and "Execute". Below this is a "Procurement Action" section with a blue header. Inside this section, there is a prompt "Please Select a Procurement Option" followed by a dropdown menu with "PR for Post Award Changes" selected. Below the dropdown is a text input field containing the number "10001583". At the bottom of the window, a status bar displays the message "Purchase Requisition 10001583 Created. WorkItem ID : 000000546508" and a window title "RD2 (400)".



When you submit the new PR, a new PR number is generated. This new PR number and all of its items will be assigned to the Purchase Order that was generated from the original PR. Once the post-award PR is submitted for approval it cannot be changed by the Requisitioner until it has been fully approved and sent to the FBMS contract management system. Approving officials may make additional changes to the PR if it is required.



De-Obligation of Awards Purchase Requisition

Topic Description

An increase in price or a change in quantity are the only things that can be amended on an awarded item using the post-award change process. All other post-award changes, such as decreasing the price or quantity of an item or completely canceling an item require funds to be de-obligated from the award. To make these types of changes, you must create a de-obligation of awards purchase requisition.

There are two types of de-obligations:

Partial de-obligation – used to make a change to an awarded item to decrease the price of the item. Do a partial de-obligation of awards purchase requisition when:

- You receive the item for a quantity or price less than what was on the original award. Since you will have money left on the award, you must de-obligate the remaining amount.
- You need to decrease the price or quantity for an item on an award PR, even if it has not yet been received.

Full de-obligation – used to completely cancel an item from the award. Do a full de-obligation of awards purchase requisition when:

- You want to cancel an item from the award.
- You want to change accounting information on an awarded item.

Helpful Hints:

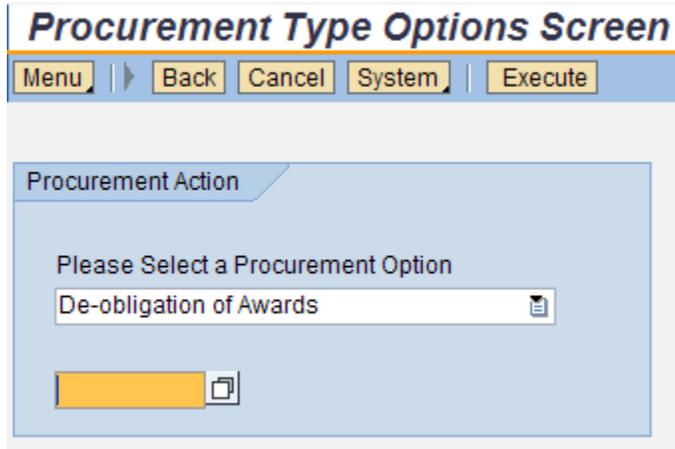
Before you begin a de-obligation of awards purchase requisition it is important to know the following information:

- Purchase Order Number from FBMS Contract Management System

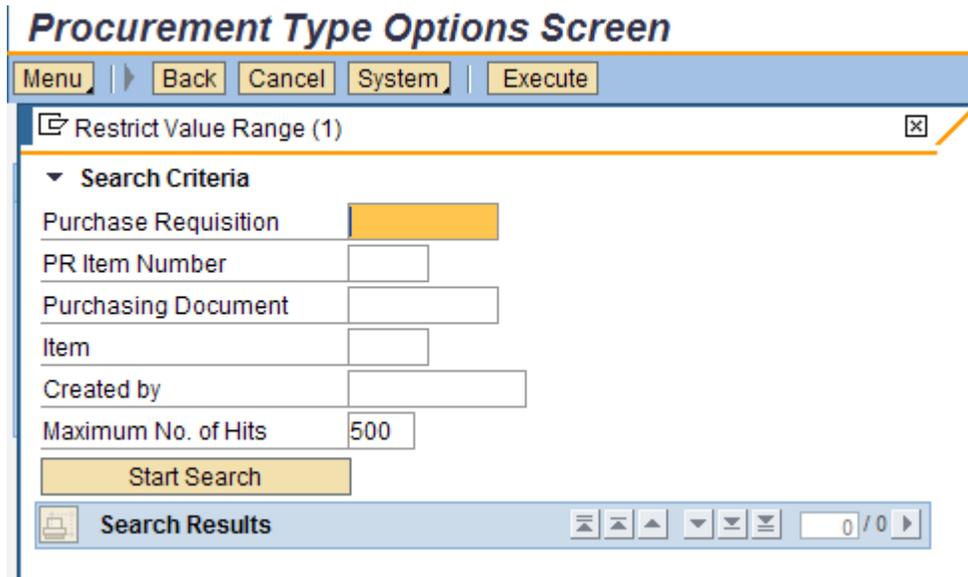
Let's Begin:

Use the following portal path to begin this transaction

- Select **Acquisition** tab → **Home** tab → **Purchasing** folder → **Purchase Request** to go to the *Procurement Types Options* screen.

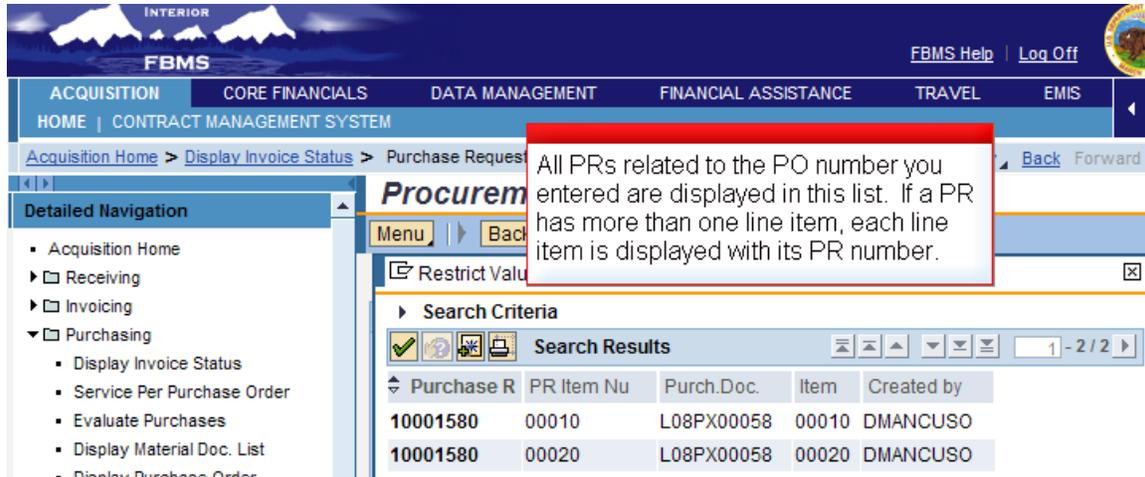


- 1) Click the **Drop down menu** icon  and select **De-obligation of Awards**.
- 2) Click in the text box below to reveal the **Drop down menu** icon . Click this icon to reveal the search screen.
- 3) In the **Purchasing Document** field of the search screen, type the **Purchase Order Number** generated from the FBMS Contract Management System

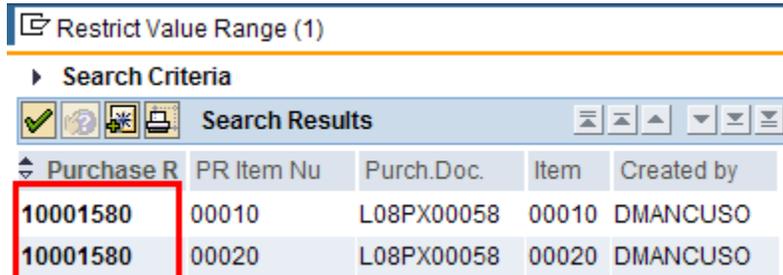


- 4) Click  .

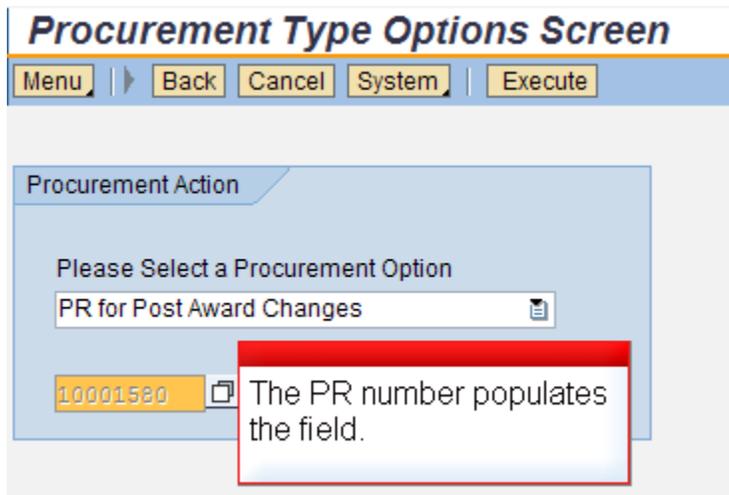
All Purchase Requisitions related to the PO number you entered will be displayed in a list. If a PR has more than one line item, each line is displayed with its PR number. In the example below, you can see two line items on one PR.



- 5) Double click on the **PR number** that you wish to display. If the PR is listed more than once (because it has more than one line item), you may select either number that is displayed.



- 6) The PR number you selected will populate the field on the **Procurement Type Options** screen. Click **Execute** to proceed.



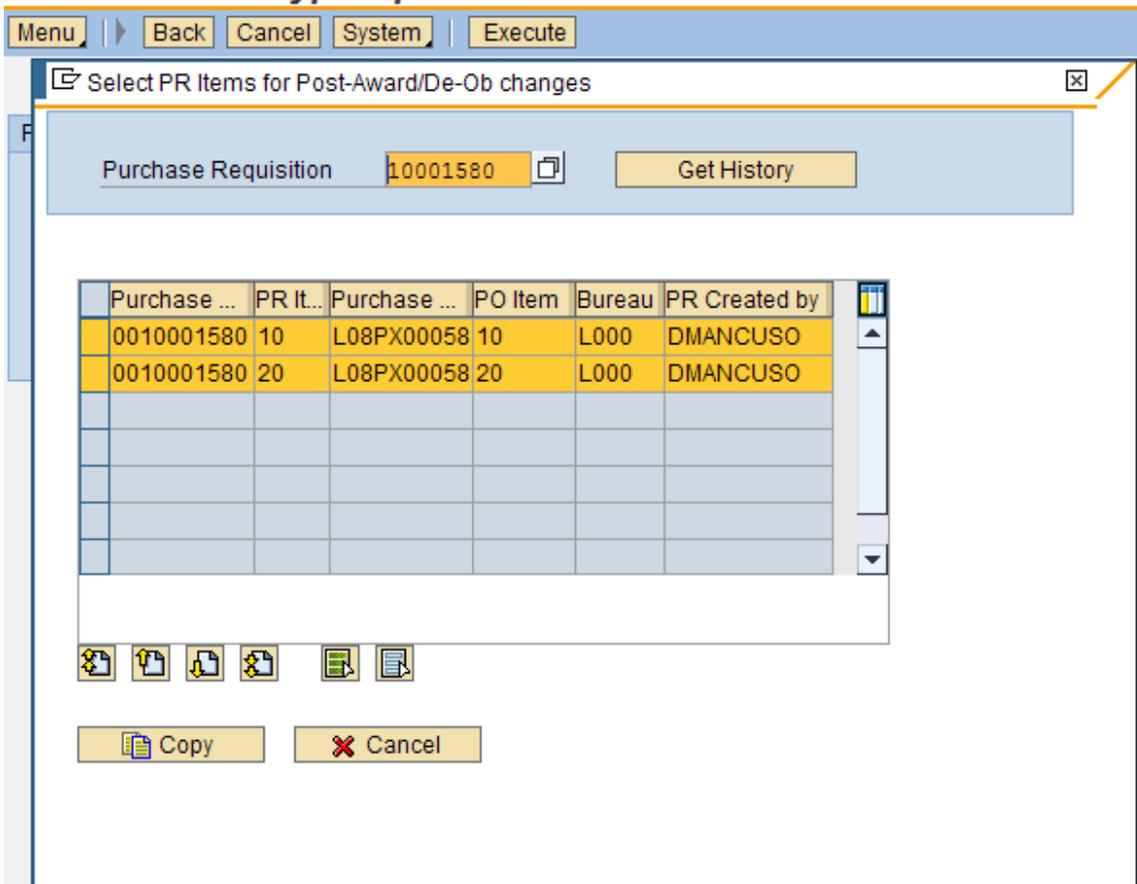
On the resulting screen, all items on the awarded PR will be displayed. You will need to select the line item(s) you wish to change by clicking in the box to the left of the line item. If you wish to change more than one line, highlight more than one.

In the example below you will fully de-obligate the first line item (to cancel it) and partially de-obligate the second line item (because of a price decrease).

7) Highlight the **line item(s)** you wish to change by clicking the box to the left of each line item. In the below example, both lines were highlighted.

8) Click  Copy to copy the selected line item(s).

Procurement Type Options Screen



Menu | Back | Cancel | System | Execute

Select PR Items for Post-Award/De-Ob changes

Purchase Requisition: 10001580  Get History

Purchase ...	PR It...	Purchase ...	PO Item	Bureau	PR Created by
0010001580	10	L08PX00058	10	L000	DMANCUSO
0010001580	20	L08PX00058	20	L000	DMANCUSO

 Copy  Cancel



The **Summary Screen – New PR for De-Obligation screen** will display. This will show your new PR with your copied line items along with all of the line item details (accounting information and delivery information).

Summary Screen - New PR for De-Obligation

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

Header Info | Approval / Status | Header Text

De-obligation of Award Li Reference PO Number:
Document Type FP Rs for Funded Contracts

Line Item	Short Text	Acc	Ite...	Act Typ
10	ACQ_D4_INT_T09 GOODS	L		4
20	ACQ_D4_INT_T09 SERVICEA	K	D	4

RD2 (400)

9) Click on the **Approval / Status** tab. Follow the same steps to add approvers to your new PR that you follow when creating a new PR (detailed on pp. 11-13 of this manual).



Notice on the **Summary Screen – New PR for De-Obligation of Award Lines** screen that Action type “4” defaults into the **Act Typ** column of every item that was selected for de-obligation. This action type denotes that the item must be de-obligated.

10a) **Full de-obligation (to cancel an item completely):** To do a **full de-obligation** of a line item, you should leave the item as it is without changing any data. If no change occurs to an item, the Contracting Officer will know to delete this item from the award.

The screenshot shows the 'Summary Screen - New PR for De-Obligation of Award Lines' interface. The 'Header Text' tab is active, displaying 'De-obligation of Award Li' and 'Reference PO Number: L08PX00058'. Below this is a table with two line items:

Line Item	Short Text	Acc	lte...	Act Typ	Quantity	U...	Est Unit Price
10	ACQ_D4_INT_T09 GOODS	L		4	1.000	EA	2,000.00
20	ACQ_D4_INT_T09 SERVICEA	K	D	4	1.000	AU	30,000.00

10b) **Partial de-obligation (to decrease the price on a line item):** To do a **partial de-obligation**, you must enter the difference between the original price and the new price in the **Est. Unit Price** field. Action type “4” alerts the contacting officer that he/she must decrease the price of the line item by the amount you have entered. To decrease the line item price, click in the **Est. Unit Price** field, delete the current entry, and replace it with the difference between the original price and the new price. Then hit **Enter** on your keyboard.

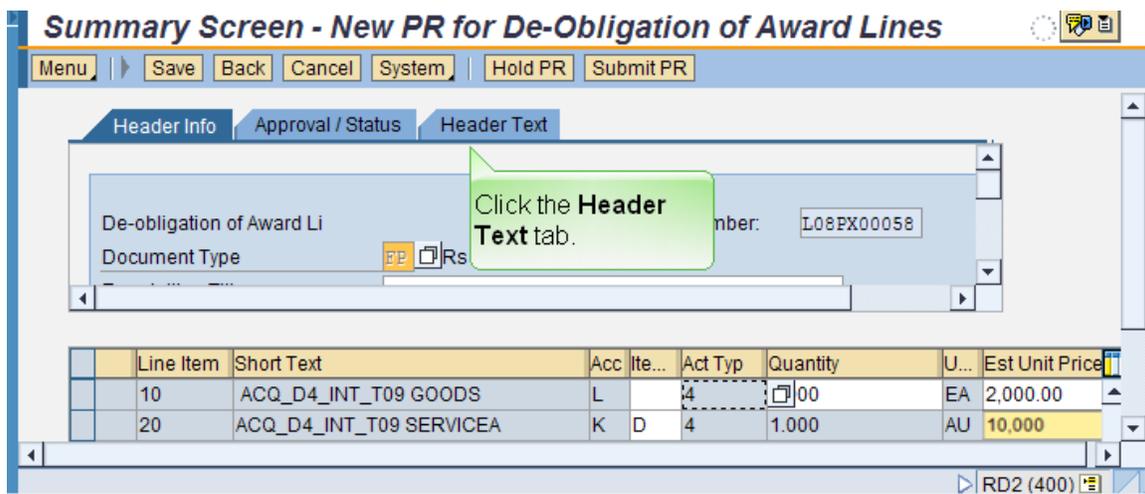
This screenshot is identical to the previous one, but includes a green callout box with the text: 'Click in the **Est Unit Price** field.' The callout box points to the 'Est Unit Price' column of the table, specifically to the value '2,000.00' for line item 10.

In the example below, the original unit price was \$30,000. The new price is \$20,000. The difference between the two, \$10,000, was entered into the **Est. Unit Price** field.

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price	Total Price
10	ACQ_D4_INT_T09 GOODS	L		4	2.000	EA	2,000.00	4,000.00
20	ACQ_D4_INT_T09 SERVICEA	K	D	4	1.000	AU	10,000.00	30,000.00

You now must enter and describe what changes are being made to the PR in the header text. This information will be used to notify the contracting officer of what changes are being requested.

11) Click the **Header Text** tab.



Summary Screen - New PR for De-Obligation of Award Lines

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

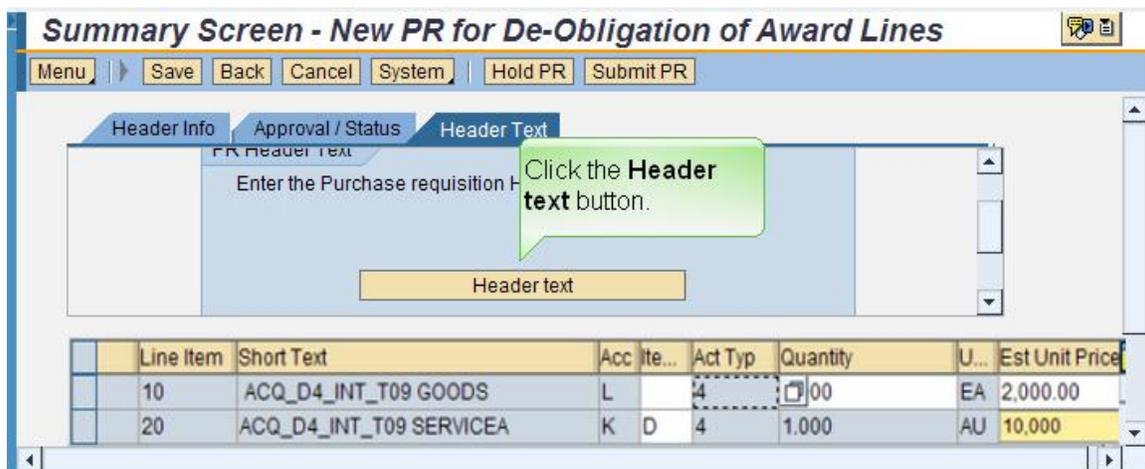
Header Info | Approval / Status | **Header Text**

De-obligation of Award Li... Document Type... PR Number: L08PX00058

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price
10	ACQ_D4_INT_T09 GOODS	L		4	2.000	EA	2,000.00
20	ACQ_D4_INT_T09 SERVICEA	K	D	4	1.000	AU	10,000.00

RD2 (400)

12) Click **Header text**.



Summary Screen - New PR for De-Obligation of Award Lines

Menu | Save | Back | Cancel | System | Hold PR | Submit PR

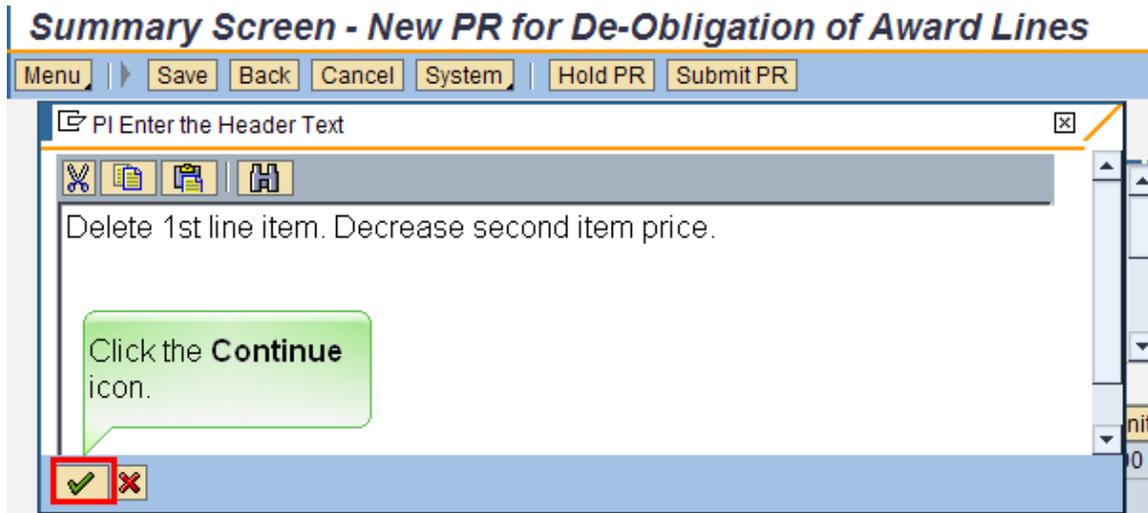
Header Info | Approval / Status | **Header Text**

PR Header Text

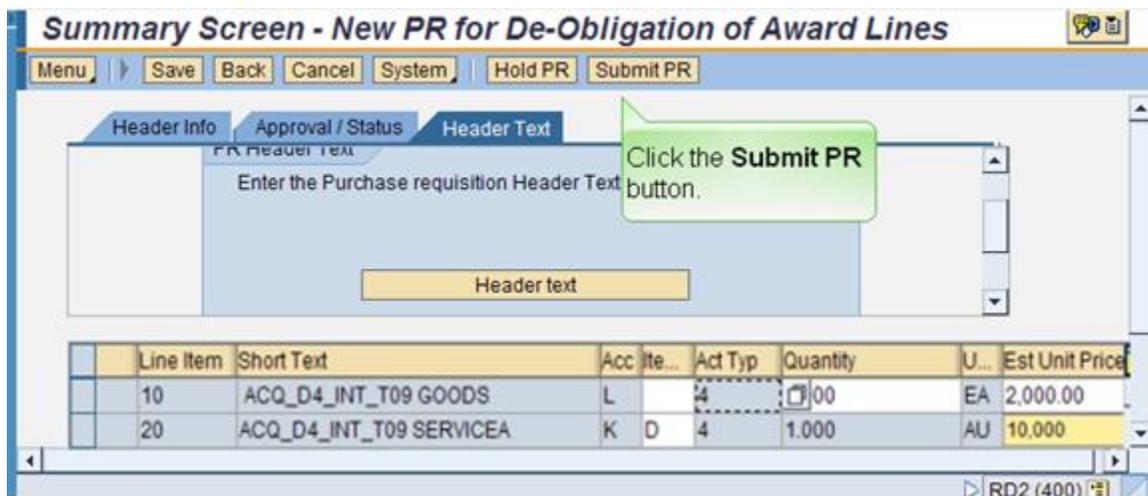
Enter the Purchase requisition H... Header text

Line Item	Short Text	Acc	Ite...	Act Typ	Quantity	U...	Est Unit Price
10	ACQ_D4_INT_T09 GOODS	L		4	2.000	EA	2,000.00
20	ACQ_D4_INT_T09 SERVICEA	K	D	4	1.000	AU	10,000.00

13) Enter the desired text, then click  to continue.



14) Once your changes are complete, click . You will return to the Procurement Types screen and your PR will now go through the normal approval process.



If submission of your PR is successful, you will receive a message at the bottom of the screen verifying that the PR has been created. Write down the Purchase Requisition number for future reference.



If you have an item on a post-award PR with incorrect accounting information, but you still want to order the item, you should complete a de-obligation of awards purchase requisition as outlined here, and:

- 1) Leave the original line item as is; it will signify to the contracting officer that you want it deleted from the original award.
- 2) Add a second line item to the PR with the same item information.
- 3) Go to **Item Details** to enter different accounting information.



Appendix A – User Product Code (UPC) Selection Guide

This guide will be used to select the appropriate User Product Service Code (UPC) for creating Purchase Requests. The UPC consists of an eight-character code that is used for deriving accounting information that is entered on the Purchase Request in the Item Detail Screen.

Follow the steps below for selecting the appropriate UPC code:

- > Click on the search ICON in the UPC field
- > Click on the Search Criteria Arrow
- > Enter the Single Service Code from Table 1, or the 2-character Goods code from Table 2 below in the UPC search code field.
- > Click Start Search
- > Double Click the appropriate UPC code to make your selection for the UPC field.

TABLE 1. SERVICES	
A - Research and Development	P - Salvage Services
B - Special Studies and Analyses - Not R&D	Q - Medical Services
C - Architect and Engineering - Construction	R - Professional, Administrative and Management Support
D - Automatic Data Processing and Telecommunication	S - Utilities and Housekeeping Services
E - Purchase of Structures and Facilities	T - Photographic, Mapping, Printing, and Publications
F - Natural Resources and Conservation	U - Education and Training
G - Social Services	V - Transportation, Travel and Relocation
H - Quality Control, Testing, and Inspection	W - Lease or Rental of Equipment
J - Maintenance, Repair, and Rebuilding of Equipment	X - Lease or Rental of Facilities
K - Modification of Equipment	Y - Construction of Structures and Facilities
L - Technical Representative	Z - Maintenance, Repair or Alteration of Real Property
M - Operation of Government Owned Facilities	
N - Installation of Equipment	

TABLE 2. GOODS	
10 - Weapons	54 - Prefabricated Structures and Scaffolding
11 - Nuclear Ordnance	55 - Lumber, Millwork, Plywood, and Veneer
12 - Fire Control Equipment	56 - Construction and Building Materials
13 - Ammunitions and Explosives	58 - Communications, Detection and Coherent Radiation
14 - Guided Missiles	59 - Electrical and Electronic Equipment Components
15 - Aircraft and Airframe Structural Components	60 - Fiber Optics Materials and Components
17 - Aircraft Launching/Landing/Ground Handling Equip.	61 - Electric Wire, and Power and Distribution Equipment
18 - Space Vehicles	62 - Lighting Fixtures and Lamps
19 - Ships, Small Craft, Pontoons, and Floating Docks	63 - Alarm, Signal, and Detection Systems
20 - Ship and Marine Equipment	65 - Medical, Dental, and Veterinary Equipment
22 - Railway Equipment	66 - Instruments and Laboratory Equipment
23 - Ground Vehicles, Motor Vehicles, Trailers, Cycles	67 - Photographic Equipment



TABLE 2. GOODS CONTINUED

24 - Tractors	68 - Chemicals and Chemical Products
25 - Vehicular Equipment Components	69 - Training Aids and Devices
26 - Tires and Tubes	70 - ADP Equipment Software, Supplies, Equipment
28 - Engines, Turbines, and Components	71 - Furniture
29 - Engine Accessories	72 - Household/Commercial Furnishings and Appliances
30 - Mechanical Power Transmission Equipment	73 - Food Preparation and Serving Equipment
31 - Bearings	74 - Office Machines
32 - Woodworking Machinery and Equipment	75 - Office Supplies and Devices
34 - Metalworking Machinery	76 - Books, Maps, and Other Publications
35 - Service and Trade Equipment	77 - Musical Instruments
36 - Special Industry Machinery	78 - Recreational and Athletic Equipment
37 - Agricultural Machinery and Equipment	79 - Cleaning Equipment and Supplies
38 - Construction, Mining, Excavating, Highway Maint.	80 - Brushes, Paints, Sealers, and Adhesives
39 - Materials Handling Equipment	81 - Containers, Packaging, and Packing Supplies
40 - Rope, Cable, Chain, and Fittings	83 - Textiles/Leather/Furs/Apparel/Shoes/Tents/Flags
41 - Refrigeration, Air Conditioning Equip.	84 - Clothing, Individual Equipment, and Insignia
42 - Fire Fighting, Rescue, and Safety Equipment	85 - Toiletries
43 - Pumps and Compressors	87 - Agricultural Supplies
44 - Furnace/Steam Plant/Drying Equip, Nuclear Reactors	88 - Live Animals
45 - Plumbing, Heating, and Sanitation Equipment	89 - Subsistence (Food)
46 - Water Purification and Sewage Treatment Equipment	91 - Fuels, Lubricants, Oils, and Waxes
47 - Pipe, Tubing, Hose, Fittings	93 - Nonmetallic Fabricated Materials
48 - Valves	94 - Nonmetallic Crude Materials
49 - Maintenance and Repair Shop Equipment	95 - Metal Bars, Sheets, and Shapes
51 - Hand Tools	96 - Ores, Minerals, and Their Primary Products
52 - Measuring Tools	99 - Miscellaneous
53 - Hardware and Abrasives	