REVIEW AND APPROVAL

Review and approval is the function of reviewing requisitions, approving or disapproving the contents, and notifying the initiator. This function also facilitates electronic budget commitments. Requisitions CAN be edited while they are in review and approval. Other documents that can be reviewed are Procurement Requests, Solicitations, Awards and Modifications.

Routing a Requisition for Review and Approval

Requisitions and supporting documentation can be routed to one or more users for review and approval BEFORE they are submitted to the Contracting Activity. The route process should include, for example, the Approving Official, Funds Certifying Official, Contract Manager, and Contracting Activity Team Leader or Contract Specialist, as appropriate.

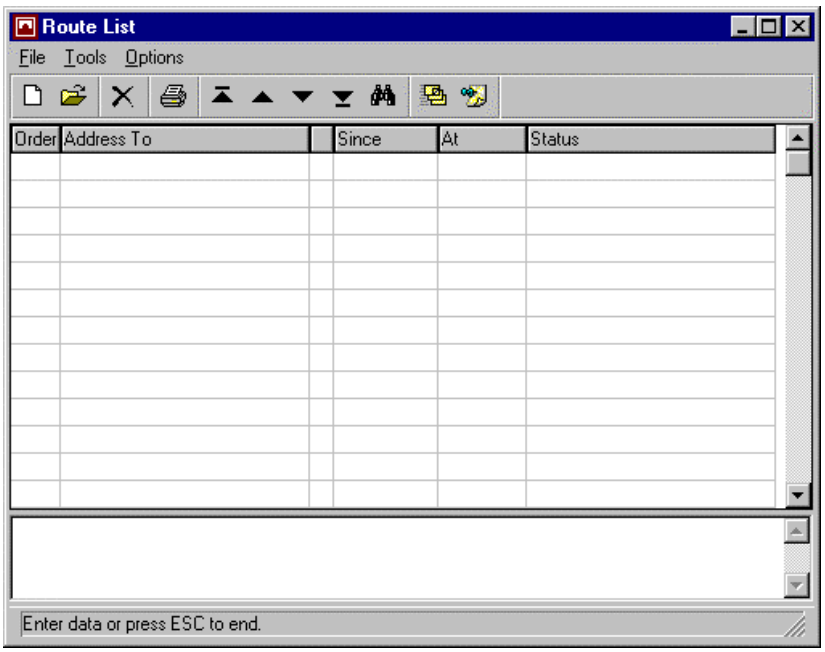
NOTE: Remember that the Contracting Activity should be the last entry on the route list.

Two options are available from the *Customer Requisition Summary Screen:* Creating a new route list and copying an existing route model into a route list with an option to modify it, if necessary.

Creating A New Route List

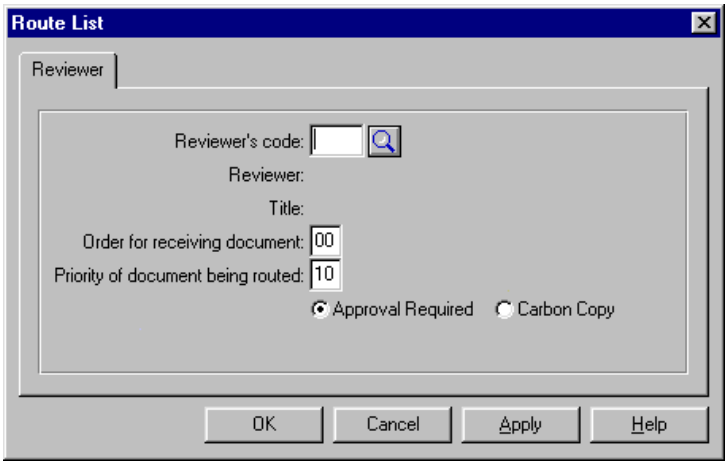
To create a new route list from the *Customer Requisition Summary Screen*, select "Tools" from the menu bar and then "Route" or click on the "Routing" hyperlink. The *Route List Browser* will appear.

Route List Browser



Click on the icon. The *Route List Data Entry Screen* will appear.

Route List Data Entry Screen

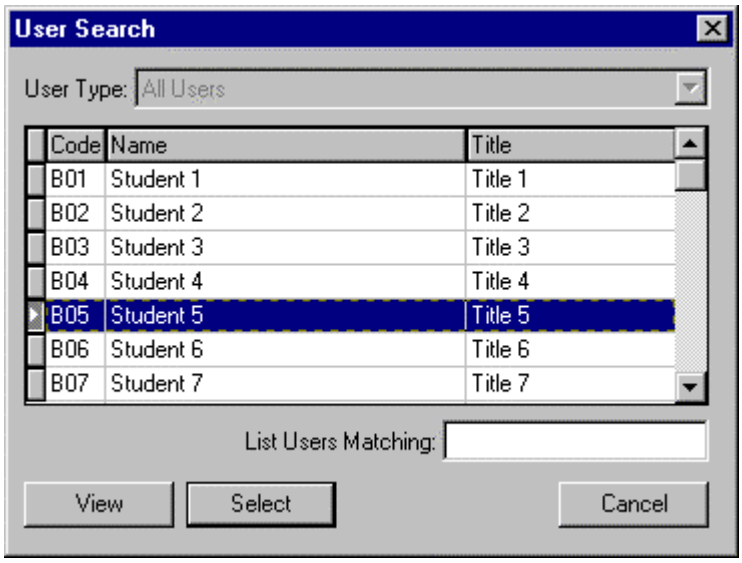


Reviewer's Code:	Add individuals to your route list by entering their Reviewer's code (three-character user ID). Press the <Tab> key to move to the next field. See below for instructions for doing a search to find a user ID.
Order for Receiving Document:	Enter order numbers in increments of ten so other names can be inserted later, if necessary. (Example: Assign "10" to

	the first person, "20" to the second person, etc.)
Priority of Document being Routed:	The default is "10." Do not change.
Approval Required/Carbon Copy:	Indicate by clicking on the appropriate radio button whether the individual is required to approve the *GSA 49* or only receive a carbon copy. (Note: Carbon copy recipients do not hold up the route process, but approvers often do.)

If a user ID is unknown, click on the icon to search for it. A *User Search Screen* will appear.

User Search Screen



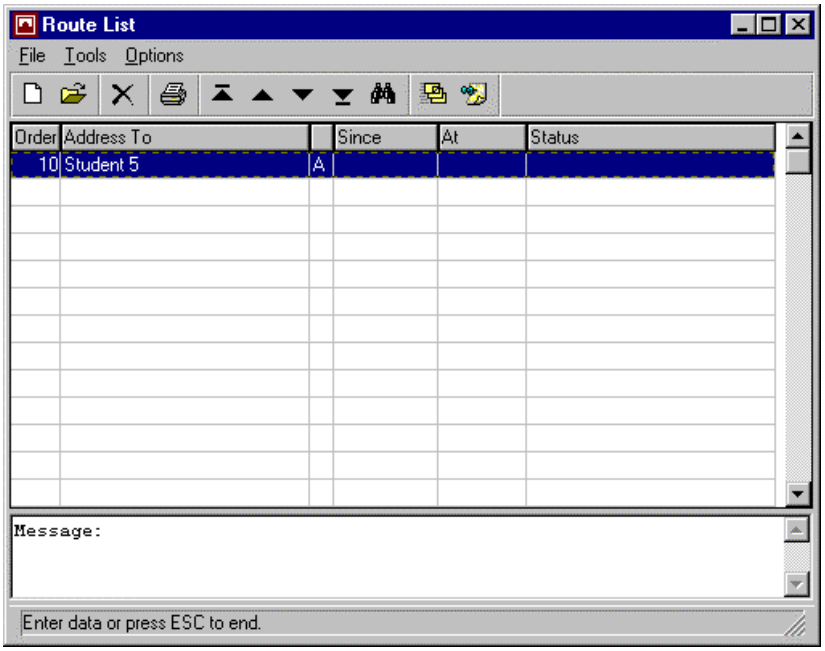
Highlight the appropriate user/ID, and click on "Select." After entering the appropriate information on the *Route List Data Entry Screen*, click on OK to save.
Continue the selection process by clicking on the icon from the *Route List Browser*, and repeat the process described above until all required recipients have been added to the route list.
Once the route list is complete, select "Tools" and then "Release" from the menu bar to route *GSA 49* to the first recipient.

Click on the icon to exit the *Route List Browser* and return to the *Customer Requisition Summary Screen*.

Copying an Existing Route Model into a Route List

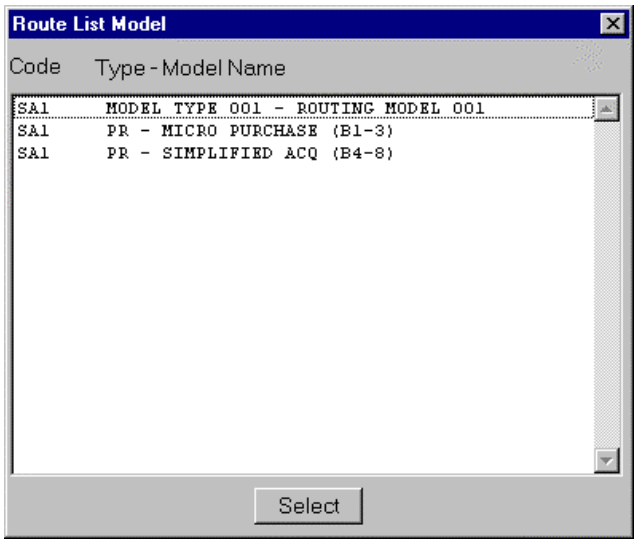
To copy a route model into a route list, from the *Customer Requisition Summary Screen*, select "Tools" from the menu bar and then choose "Route." The *Route List Browser* will appear.

Route List Browser



From the *Route List Browser,* select "Tools" and then "Model" from the menu bar. The *Route List Model Screen* will display.

Route List Model Screen



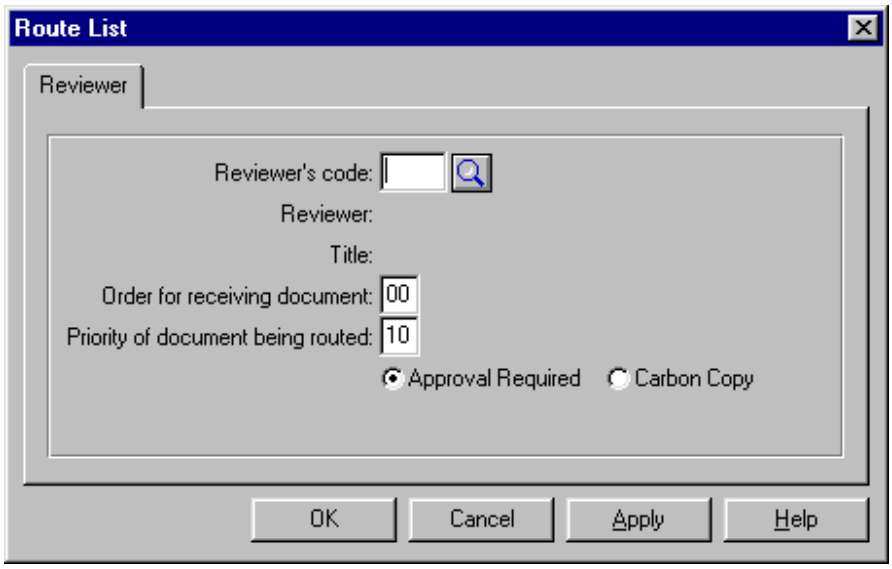
Highlight the appropriate route model and click on "Select." The *Route List Browser* will appear, displaying the individuals in the route model.

If the route list is correct, click the icon, and EAS returns to the *Customer Requisition Summary Screen*. If the route list is incorrect, however, follow the steps described below for adding and/or deleting individuals to the route list.

Modifying a Route List

To ADD an individual to a route list from the *Route List Browser,* click the icon on the menu bar, and the *Route List Data Entry Screen* will appear.

Route List Data Entry Screen



Reviewer's Code:	Enter the reviewer's three-character user ID. Press the <Tab> key to move to the next field. If you need to perform a search for the ID, follow the instructions for doing so given earlier in this chapter.
Order for Receiving Document:	Enter the order number for the new individual. Insert the new individual's name between existing recipients or at the end of the route list.
Priority of Document being Routed:	The default is "10." Do not change.
Approval Required/Carbon Copy:	Indicate (by clicking on the appropriate radio button) whether the individual is required to approve *GSA 49* or only receive a carbon copy. (Note: Carbon copy recipients do not hold up the route process.)

After entering the appropriate information, click OK to save and return to the *Route List Browser*. If the route list is complete, click on the icon to exit and return to the *Customer Requisition Summary Screen*. Otherwise, to add additional individuals, click the icon on the menu bar from the *Route List Browser*, and repeat the process described above.

Once the route list is complete, select "Tools" and then "Release" from the menu bar of the *Route List Browser* to route *GSA 49* to the first recipient.

NOTE: *If you are using a route model, the "Tools"/"Release" function is not required. EAS automatically routes the* GSA 49 *to the first recipient listed on the model.*

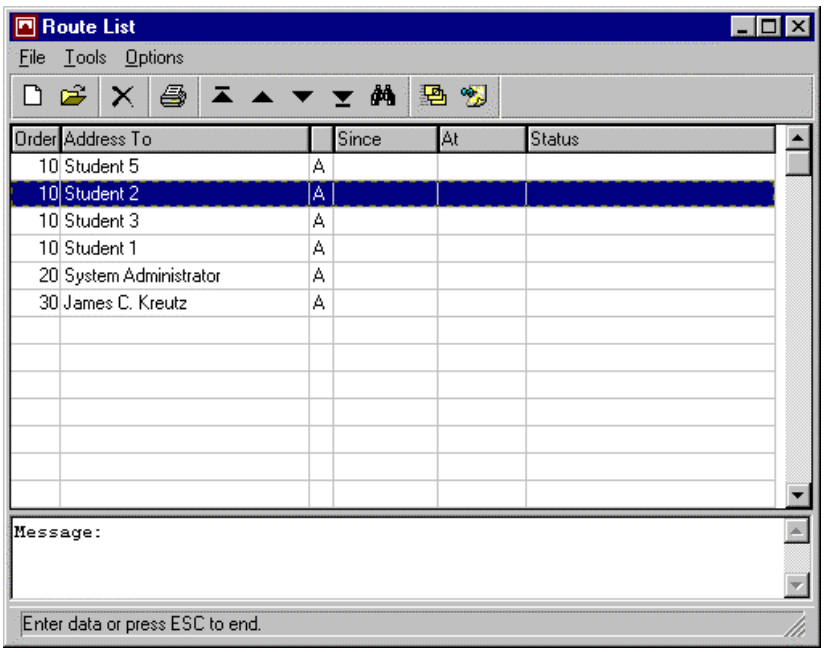
To DELETE individuals from a route list, highlight their user ID on the *Route List Browser* and click . A dialogue box will appear to confirm the deletion command. Click on "Yes" or "No," as appropriate. EAS returns to the *Customer Requisition Summary Screen.*

NOTE: *A requisition is routed for review and approval the instant you create your route list by selecting a route model. The status on the first individual will read "Review Pending." After the first individual has approved a requisition, its status changes to "Approved," and the status of the second individual becomes "Review Pending."*

Route Status

Once created, a route list displays on the *Route List Browser*. Next to the name of each reviewer on the *Browser* are columns for date and time, indicating when a reviewer received a routed record. The last column contains the status of the routed record in regards to each reviewer. By displaying the date, time, and status, users can keep track of the location of routed records as well as the length of time they remained in each reviewer's Inbox.

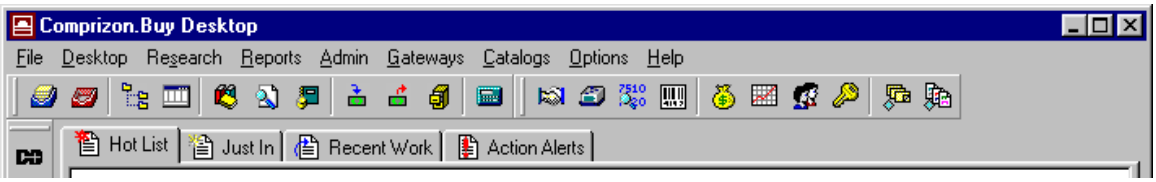
Route List Browser



Reviewing a Procurement Request

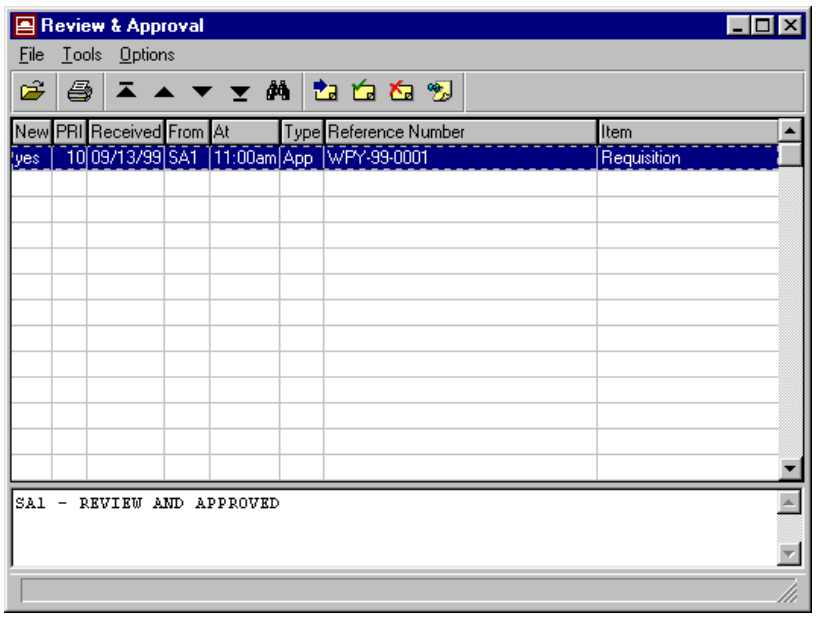
At the EAS desktop, a yellow stack of papers above the blue "Inbox" icon notifies the reviewing/approving official that there are documents waiting to be reviewed and approved.

EAS Desktop



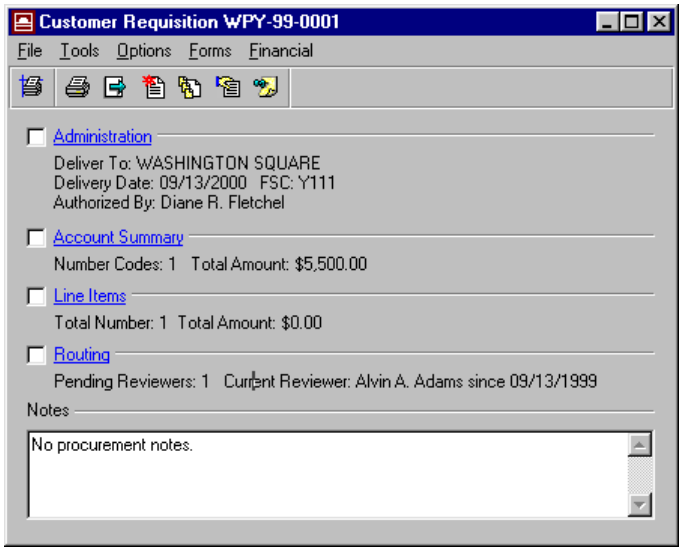
Click on from the EAS desktop menu. The *Review & Approval Browser* will appear.

Review & Approval Browser



Look at the column titled "Type." "App" identifies a procurement request sent to be APPROVED. "FYI" identifies a copy of a procurement request. Highlight the procurement request to be reviewed and double click for its *Customer Requisition Summary Screen* to appear.

Customer Requisition Summary Screen



Click on "Administration," and the *Customer Requisition Tab Control Screen* will appear, with the *Admin Screen* defaulting.

Customer Requisition Tab Control Screen

Admin Screen

Customer Requisition

Admin | Funding | Addresses | Sources

Purchase Type
- (•) Requisition
- ( ) Credit Card Card No: To Be Assigned
  Name:

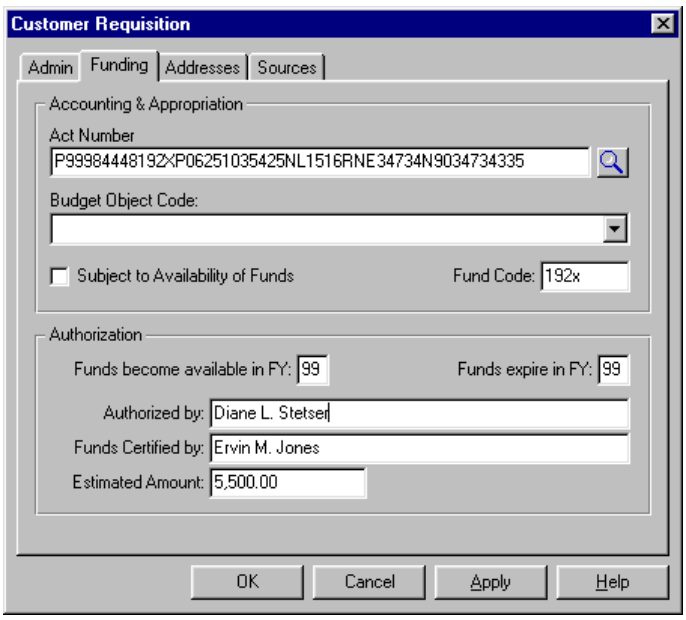
Administrative Data
- Requisition Date: 09/13/1999 Requisition Form: GSA49
- Requesting Office: WPY Project ID: RDC12345
- Point of Contact: Alvin A. Adams Dept: WPYB
- POC Phone: 202.708.7858

Properties
- Delivery Date: 09/13/2000 FSC: Y111 Priority: 99
- Purpose: New Court House in Reston, Va

OK | Cancel | Apply | Help

After reviewing the data here, click on the "Funding" tab, which is next to the "Admin" tab at the top of the screen. The *Funding Screen* will appear. See the note below regarding information that is required on the *Admin* and *Funding Screens*.

Funding Screen



NOTE TO FUND CERTIFYING OFFICIAL: Verify *that complete accounting and appropriation data have been entered. Visit both the* Funding Screen *within the Admin area, and the* Accounting Screen *within the Line Item area.*

(1) *To view or insert accounting information in the* Admin Screen*, click on "Admin" and then on the "Funding" tab. If coding is incomplete, insert the accounting and appropriation data in the proper format. (Refer to the following Accounting Classification Table.) The system allows for only one line of coding in the Funding area of the* Admin Screen. *If multiple lines of accounting are needed, they need to be entered in the Accounting area of the* Line Item Screen.

(2) *To view or insert accounting information in the* Line Item Screen*, click on "Line Items" hypertext link and then on the "Accounting" tab. Verify the existing data is correct. If line item accounting information is blank, insert data by clicking on "New." Information previously entered in the* Funding Screen *of the Admin area will pull forward; edit it as necessary. For multiple lines of coding, continue selecting the "New" icon until the cost or percentage equals 100%.*

ACCOUNTING CLASSIFICATION TABLE

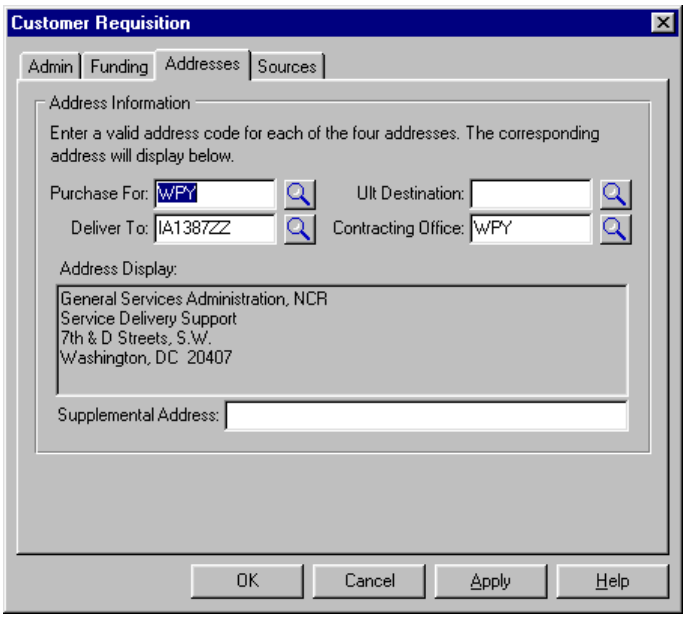
ACCT CODE	LENGTH	EXAMPLE
ACT #:	9	P12345678
Fund Code:	4	192X
Org Code:	8	P0730001
Budget Activity:	2	54
Object Class:	2	25
Function Code:	3	RK1
Cost Element:	3	516
Project #:	8	RTX96057

CC-A:	8	N9123456
Work Item:	3	314
CC-B:	8	TX0224ZZ

NOTE: *If portions of the above accounting classification codes are not needed, leave blank spaces in their place by pressing the space bar the correct number of spaces.*

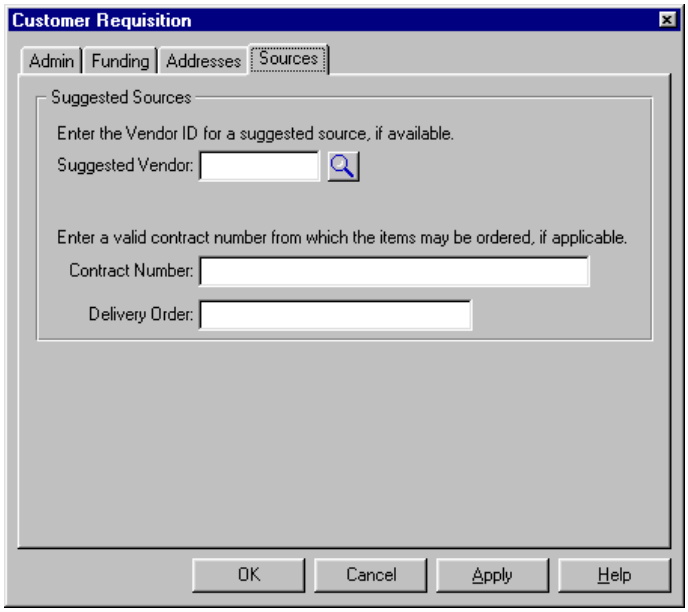
After reviewing the funding data, click on the "Addresses" tab at the top and the *Addresses Screen* will appear.

Addresses Screen



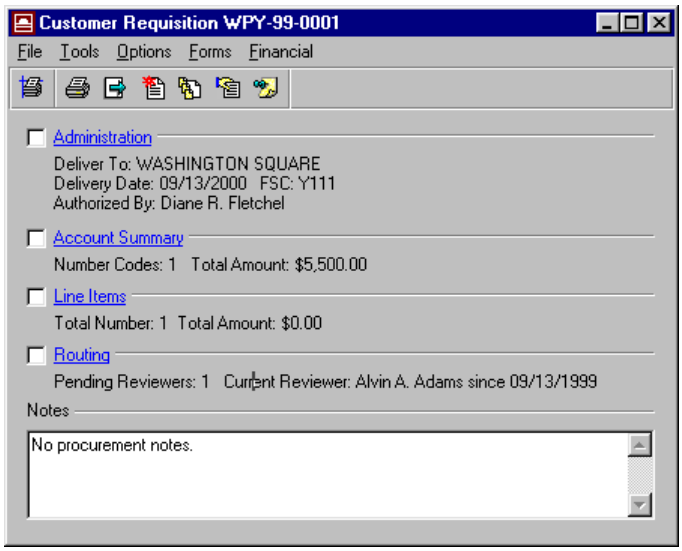
Review the data in the *Addresses Screen,* and then click on the "Sources" tab to review the data on the *Sources Screen.*

Sources Screen



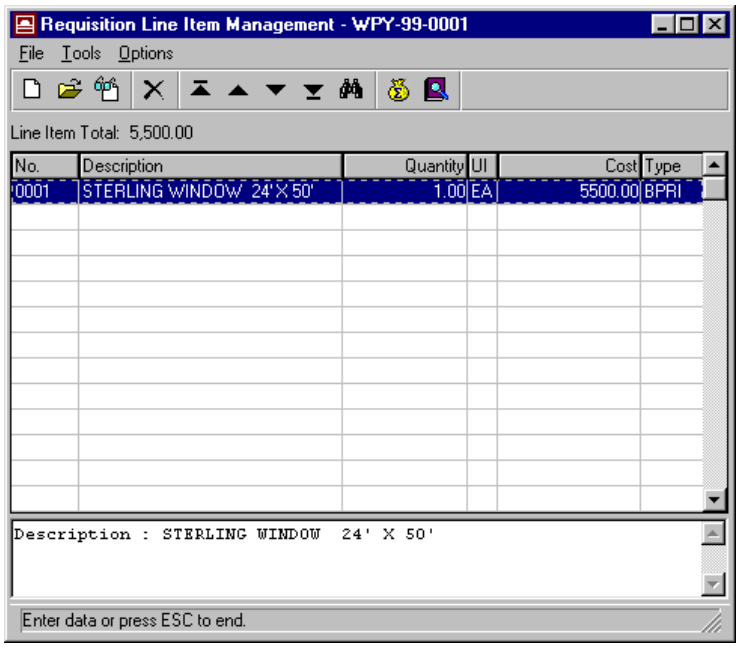
After reviewing all the data screens, click on OK .

Customer Requisition Summary Screen



Click on "Line Items," and the *Requisition Line Item Management Browser* will appear.

Requisition Line Item Management Browser



Highlight the first line item, and double-click. The *Requisition Line Item Tab Control Screen* will appear, with the *Detail Tab* defaulting.

Requisition Line Item Tab Control Screen

Detail Screen

Requisition Line Item

Detail | Accounting | Delivery | Additional Info

Item Detail

Item No.	Quantity	UI	Unit Cost	Total Cost
0001	1.00	EA	5,500.00	5,500.00

FSC: Y111

Stock Item No.:

Header Description

STERLING WINDOW 24'X 50'

OK | Cancel | Apply | Help

Review the data in the *Detail Screen,* and then click on the "Accounting" tab to review the data on the *Accounting Screen*.

Accounting Screen

Requisition Line Item

Detail | Accounting | Delivery | Additional Info

Accounting & Appropriation

Line Item Cost: 5,500.00 Fund Code: 192x

Account Lines:

Cost	Pct	BOC	Account Code
5,500.00	100.00		PXXXXXXXX192XP06251035425N

Total Cost: 5,500.00 Total Percent: 100.00 %

Change Account Line

New | Delete

Cursor Position

Account: PXXXXXXXX192XP06251035425NL1516RNE34734N9034734

BOC:

Percent: 100.00 Cost: 5,500.000000 Cost Percent

OK | Cancel | Apply | Help

After reviewing the funding data, click on the "Delivery" tab.

Delivery Screen

Requisition Line Item

Detail | Accounting | Delivery | Additional Info

Shipping Information

Delivery Date: 09/13/2000

Deliver To: MO1744ZZ

FOB Designation: Origin / Destination / See Schedule

Address Display:

VAN GUARD SELF STGE
2403 HIGHWAY 63 NORTH

COLUMBIA MO 65202

Priority: 99

Supplemental Address:

OK | Cancel | Apply | Help

Review the data in the *Delivery Screen,* and then click on the "Additional Info" tab.

Additional Info Screen

Requisition Line Item

Detail | Accounting | Delivery | Additional Info

Pricing Options

Not Separately Priced
Not to Exceed
Option Year
Prior Year

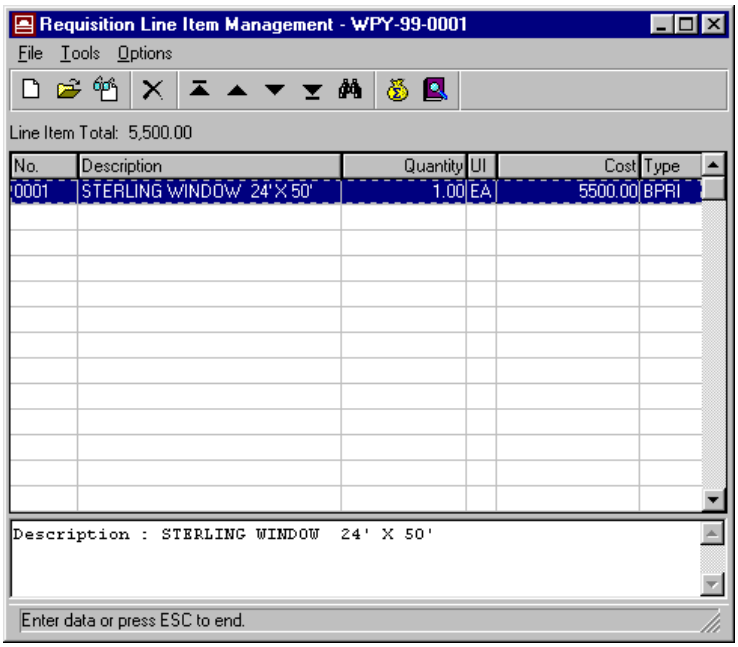
Additional Information

Project ID: RDC12345

OK | Cancel | Apply | Help

After reviewing/verifying the data on all screens, click on OK to save changes and return to the *Line Item Management Browser*.

Requisition Line Item Management Browser

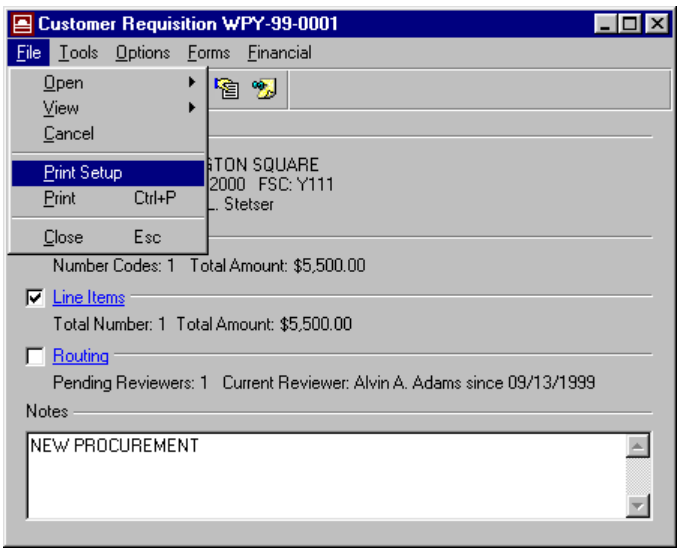


To close either click the ✕ in the upper right-hand corner OR choose "File" and "Close" from the pull-down menu. If a hard copy of the requisition is not required, skip to steps in the "Approving or Disapproving Routed Information" section below.

Printing a Procurement Request (GSA 49)

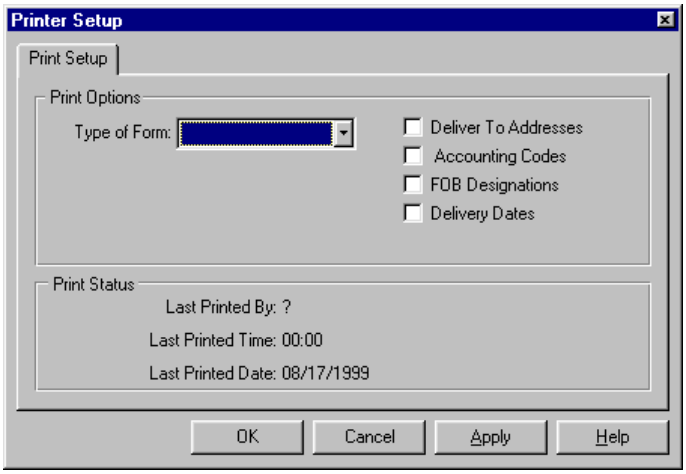
A hard copy of the requisition can be printed from the *Customer Requisition Summary Screen*.

Customer Requisition Summary Screen



Highlight "File" from the pull-down menu and choose "Print Setup." The *Printer Setup* T*ab Control Box* will appear.

Printer Setup Tab Control Box

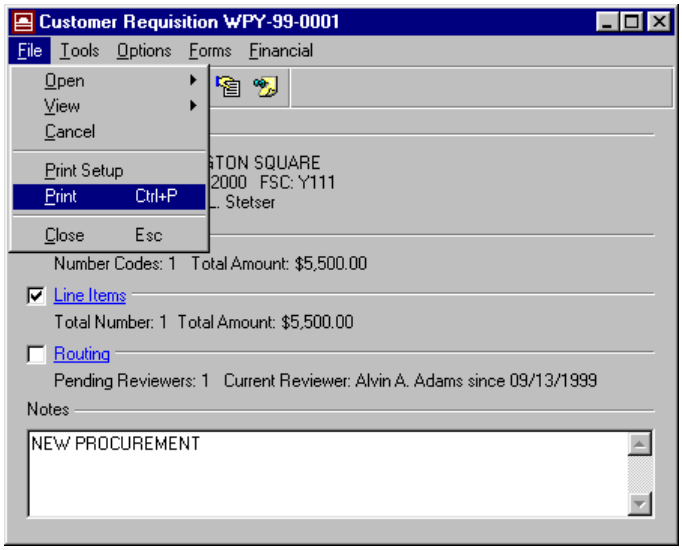


Click the drop down arrow in the box next to the words "Type of Form." Highlight "GSA 49." To choose additional information to print on the *GSA 49,* press the <Tab> key to move through each field. Click white squares to make the check marks appear.

Type of Form:	Select the appropriate form from the drop down menu.
Delivery to Addresses:	Click this box to display the delivery address on the form.
Accounting Codes:	Click this box to display accounting codes on the form.
FOB Destinations:	Click this box to display the FOB destination on the form.
Delivery Dates:	Click this box to display the delivery date on the form.

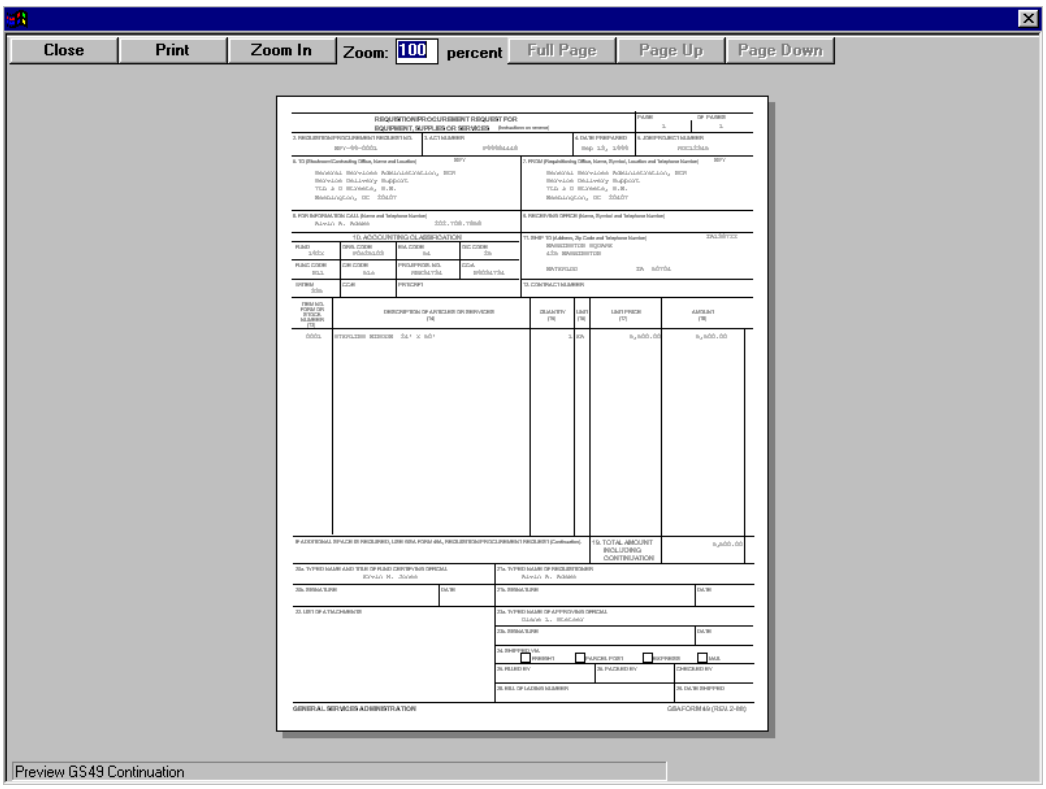
Click on OK to return to the *Customer Requisition Summary Screen.*

Customer Requisition Summary Screen



To print choose "File" and "Print" from the pull-down menu.

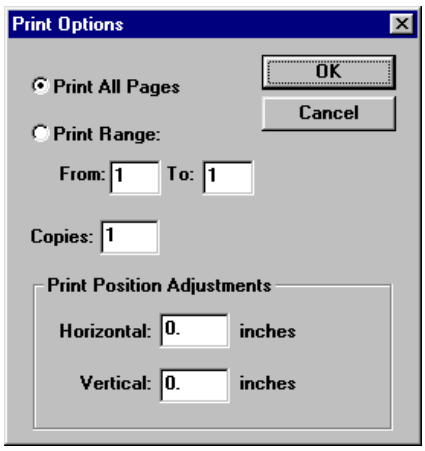
Print Preview Screen



The form will preview on the screen. To view in a larger print, highlight the "100" in the "Zoom" field at the top of the screen and overtype "30." Click on Zoom In . (Use the right-hand side scroll arrows to view the document.)

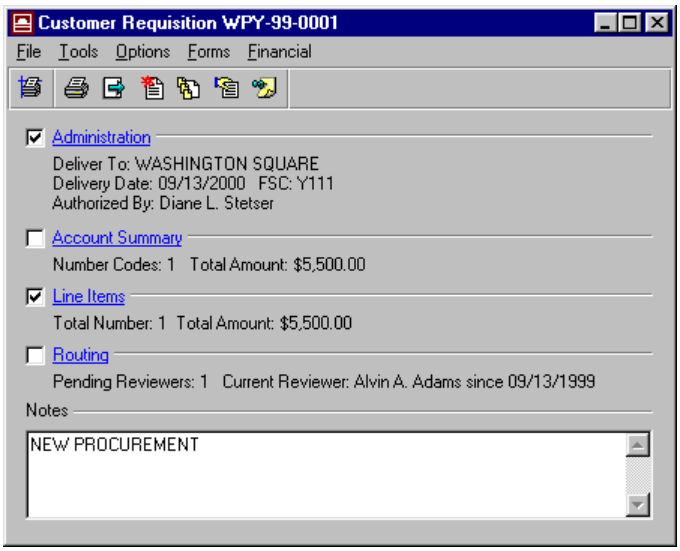
To cancel the print job, click on Close . To print, click on Print button at the top of the screen.

Print Options Prompt Screen



After making the appropriate changes to the *Print Options Prompt Screen*, click on OK to print. Or click on Close to exit and return to the *Customer Requisition Summary Screen.*

Customer Requisition Summary Screen



Click on ☒ in the upper right-hand corner to close the window. Or choose "File" and "Close" from the pull-down menu to return to the *Review & Approval Browser.*

The last person on the routing list should be a Procurement Supervisor or the Contract Specialist who will be handling a requisition. BEFORE approving the requisition, this person must SUBMIT the requisition.

All other reviewers should return to the *Review & Approval Browser* by either clicking the ☒ in

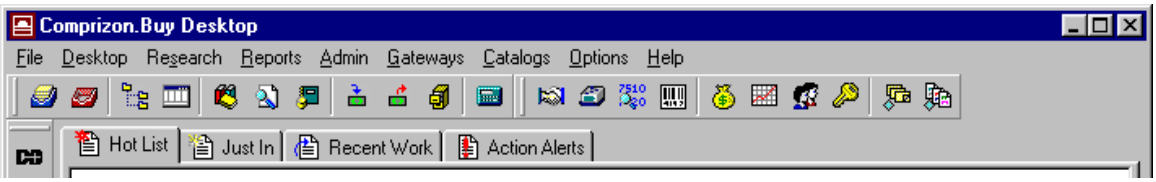
the upper right-hand corner or choosing "File" and "Close" from the pull-down menu.

Submitting a Requisition

Submitting a requisition is the function of electronically accepting and assigning work actions to a Contracting (EAS) user's worksheet for processing. Because this process cannot be undone, ONLY PROCUREMENT PERSONNEL ARE AUTHORIZED TO SUBMIT REQUISITIONS after they have been reviewed by the assigned specialist.

The process of submitting a requisition creates a purchase request on the designated worksheet. These instructions are from the EAS desktop; if the Customer Requisition is open, skip to the appropriate step.

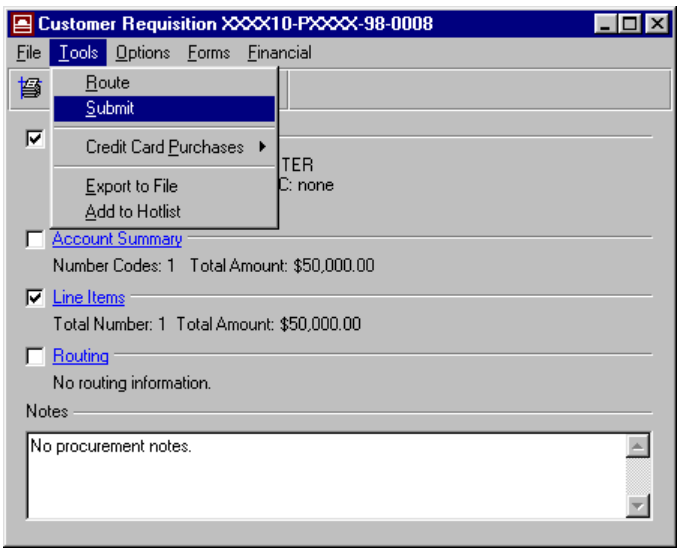
EAS Desktop



From the desktop, click on and choose "Customer," or use the pull-down menu and select "Desktop," "Worksheets," and "Customer."

To submit a requisition, click on the requisition's name and the *Customer Requisition Summary Screen* will open.

Customer Requisition Summary Screen



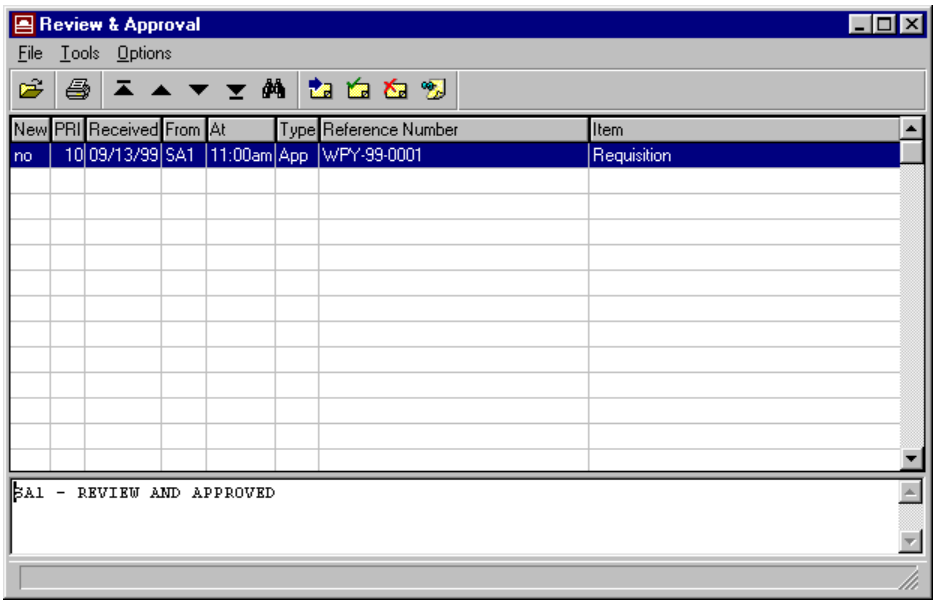
Click "Tools" and "Submit" to display the *Submit Requisition Screen*.
Complete the following table:

Requisition number:	(Defaults to the Requisition No. Being assigned.)
Purchase Request No.:	EAS will mirror the Requisition No. with Purchase Request No.
Procurement Dept.:	Click the radio button for the worksheet to which the purchase request is to be assigned.
Assign To:	Insert the 3-letter ID of the procurement person to whom it is to be assigned OR use the to search for the user by "Name" and "Select" the User ID.

Click on OK to return to the *Customer Requisition Screen*. Then, click the in the upper right-hand corner OR choose "File" and "Close" from the pull-down menu to return to the *Review & Approval Browser*.

Adding and Viewing a Message

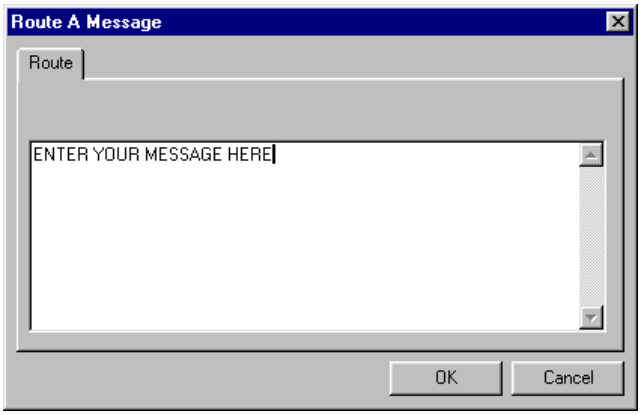
Review & Approval Browser



If a reviewer has made changes to the requisition or if the reviewer will be disapproving it, the Requisitioner should be informed of the reasons for these actions.

To add comments, click "Options" from the menu bar. Then, select "Messages" and "Open" from the pull-down menu to display the *Route a Message Screen*.

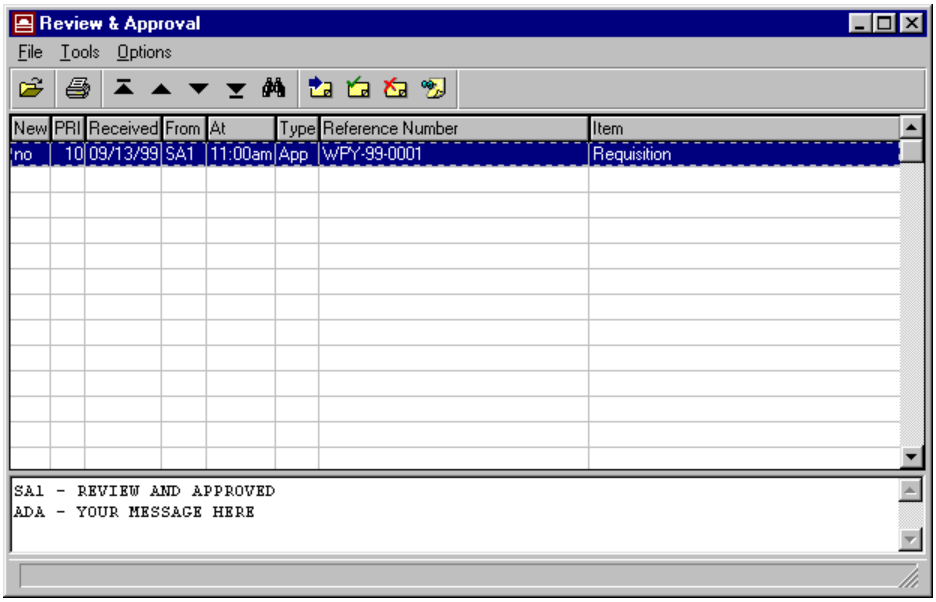
Route a Message Screen



After entering a message, click on OK to return to the *Review & Approval Browser*. The

message will be displayed at the bottom of the screen (see below).

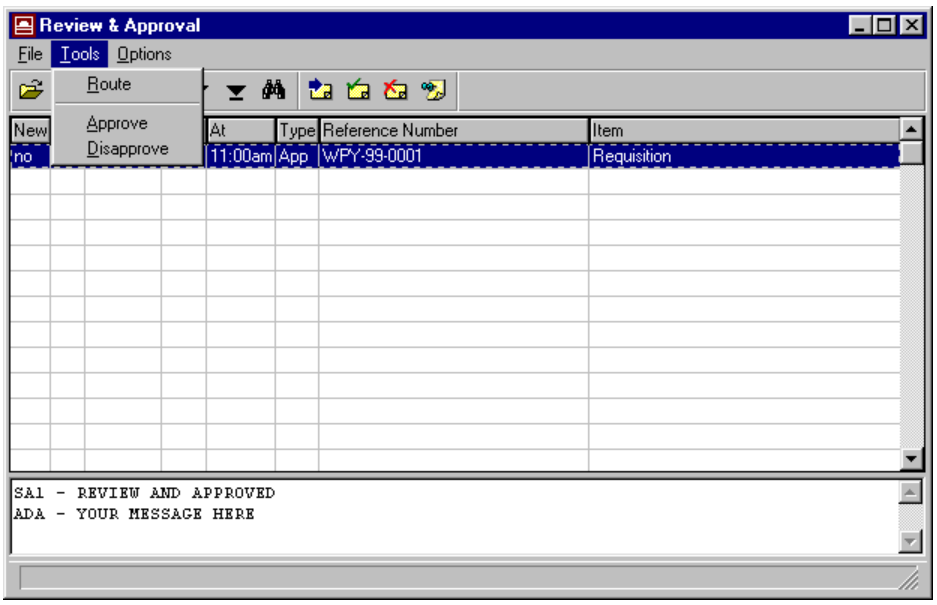
Review & Approval Browser



Approving or Disapproving Routed Information

To approve or disapprove routed information, highlight the action, click on the icon for APPROVE or the icon for DISAPPROVE. Or choose "Tools," and select "Approve" or "Disapprove" from the pull-down menu.

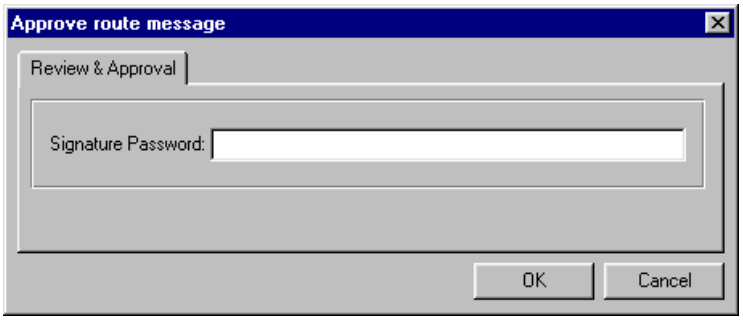
Review & Approval Browser



NOTE: *When disapproving a procurement document, it is a good practice to add a comment informing the initiator why the document is being disapproved. SEE the "Adding Messages" section.*

The *Approve Route Message Prompt Box* will appear.

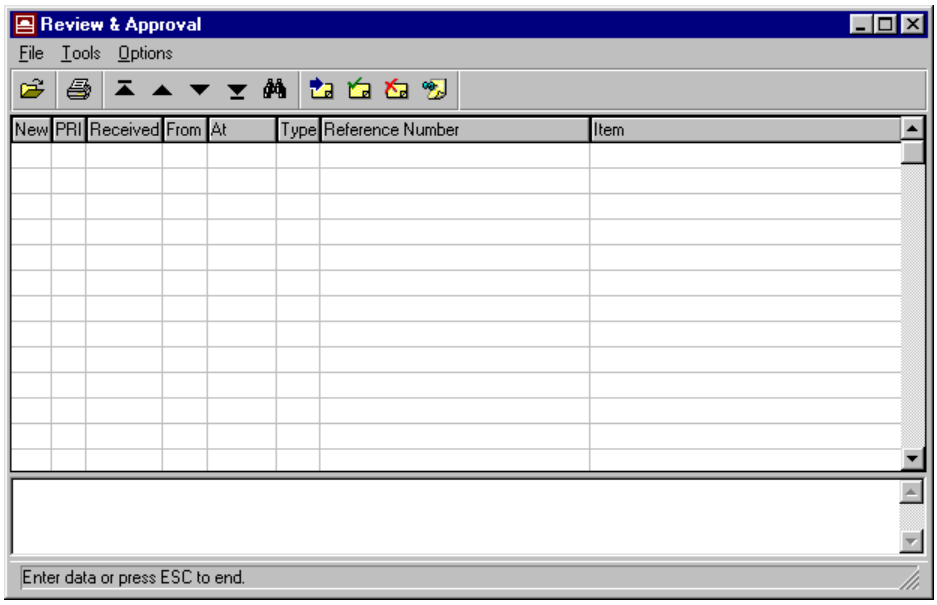
Approve Route Message Prompt Box



After entering a signature password, press the OK button to return to the *Review & Approval Browser.*

NOTE: *If problems with a signature password occur,* **c***ontact the system administrator to have a new signature password issued.*

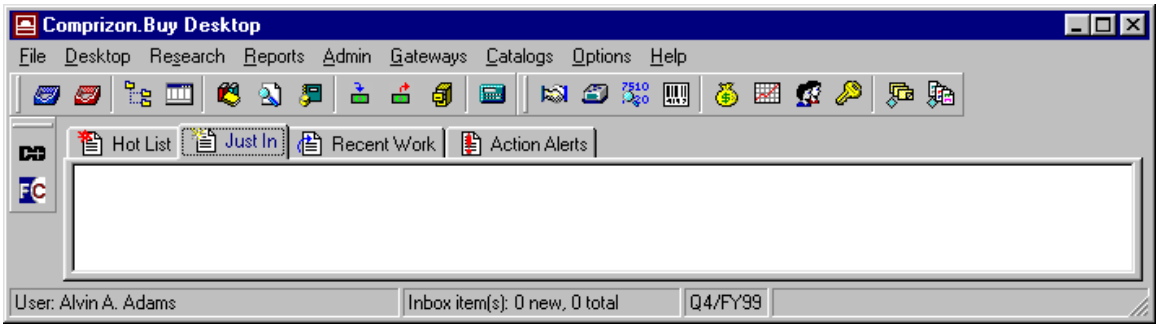
Review & Approval Browser



The approved/disapproved record will disappear from the *Review & Approval Browser* and will be forwarded to the next recipient listed on the route list, if applicable.

To close the screen and return to the EAS desktop, click the ☒ in the upper right-hand corner.

EAS Desktop

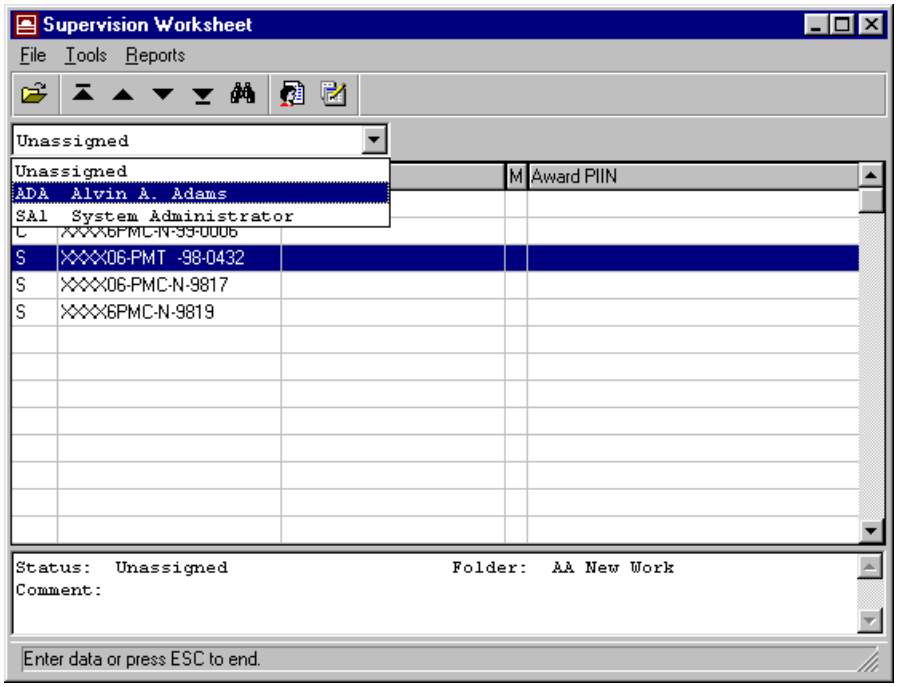


Reassigning Actions

NOTE: *THIS STEP IS TO BE UNDERTAKEN BY CONTRACT MANAGERS ONLY!*

From the EAS desktop, click on the icon and highlight "*Supervision*" Or use the pull-down menus to select "Desktop," "Worksheet," and "Supervision." The *Supervision Worksheet* will appear, with the "Unassigned" work filter defaulting.

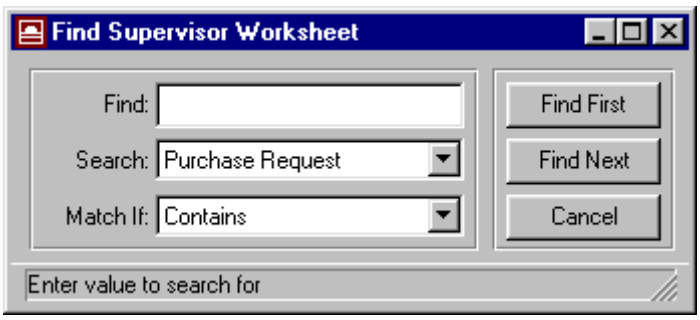
Supervision Worksheet



If the action is on a user worksheet, use the pull-down arrow next to "Unassigned" to highlight the employee name whose worksheet it is on.

If you know the action number (i.e Purchase Request, Solicitation, Contract PIIN), click on the icon to locate. The *Find Supervisor Worksheet Screen* will appear.

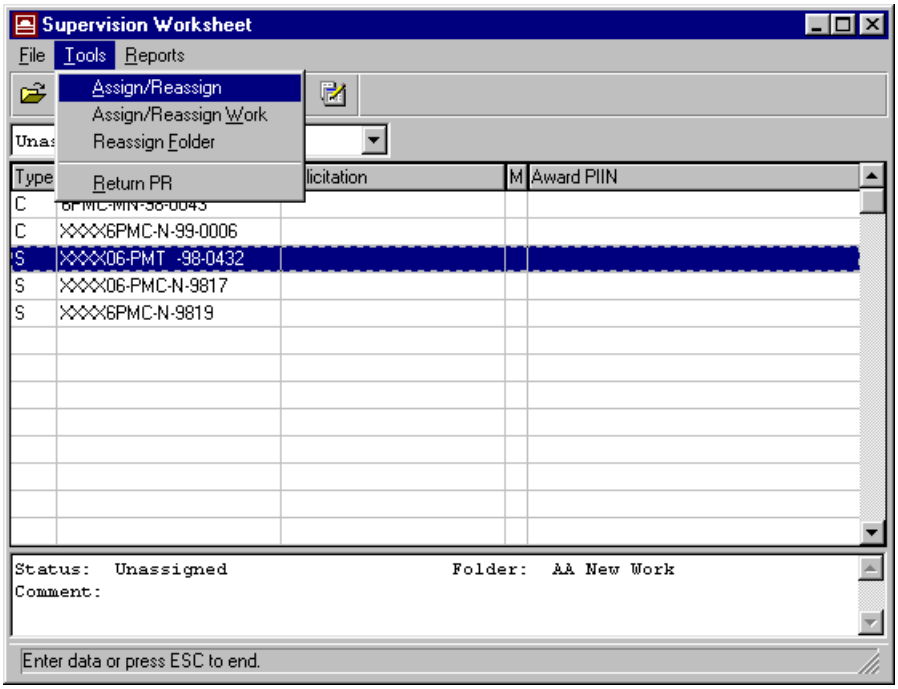
Find Supervisor Worksheet Screen



Insert the number of the action you want in the "Find" field. Use the drop-down arrow on the "Search" or "Match If" fields to help locate. Click Find First, and EAS highlights the first action which matches the description entered.

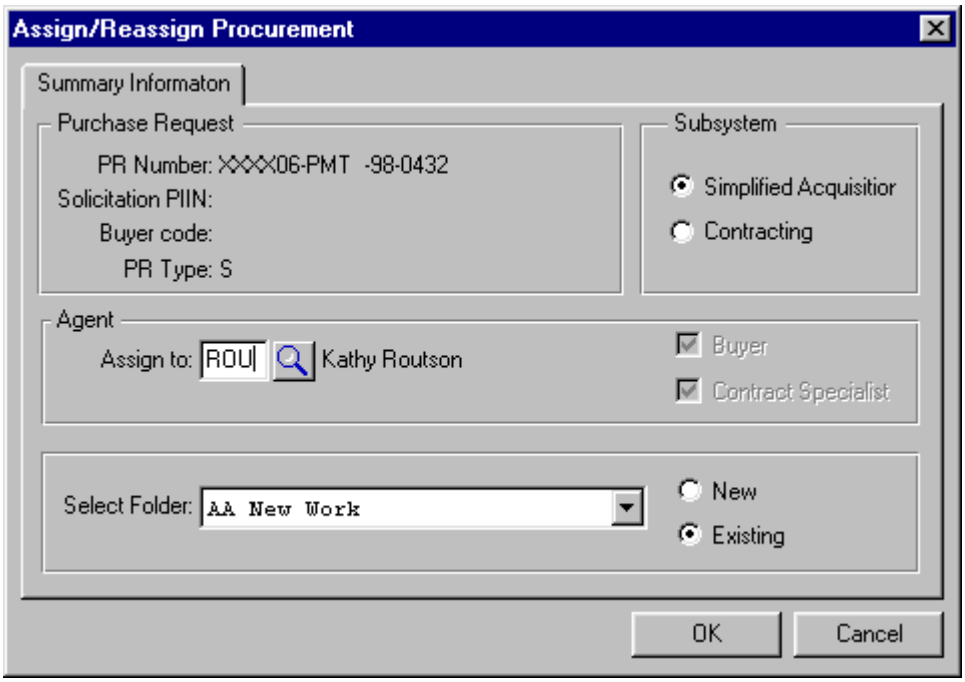
Click Find Next to locate the next action matching the entered description or Cancel to close the *Find Supervisor Worksheet Screen* to return to the *Supervision Worksheet*. (The action will be highlighted.)

Supervision Worksheet



Use the pull-down menu, click "Tools" and "Assign/Reassign." The *Assign/Reassign Procurement Screen* will appear

Assign/Re-assign Procurement Screen



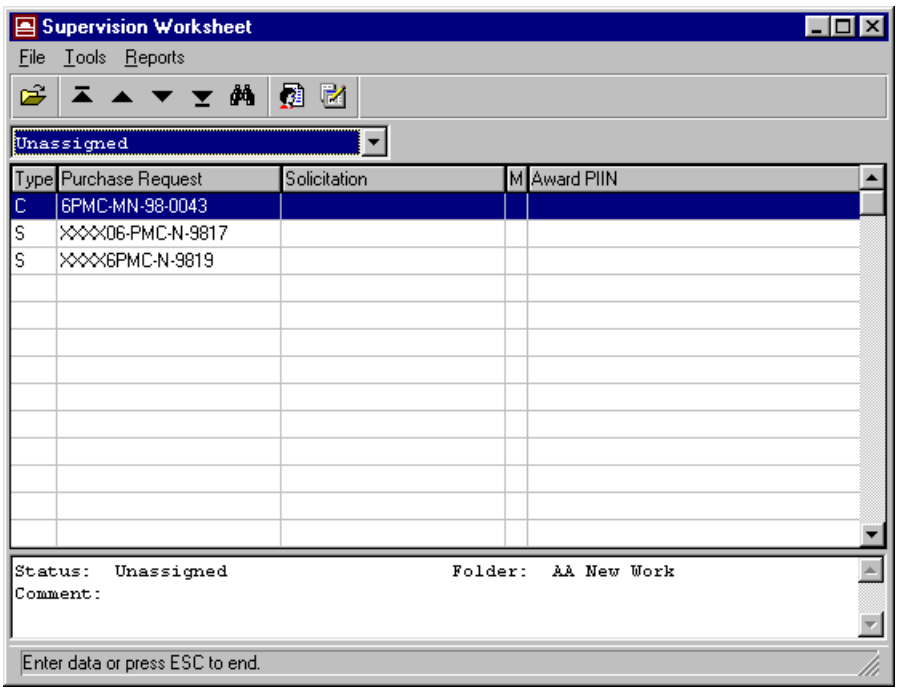
To assign an action to a new agent or contract specialist, insert the 3-letter ID for that individual OR use the to search for the ID by name. TAB TO THE NEXT FIELD.

To re-assign an action from one worksheet to another (i.e., from *Simplified Acquisition* to *Contracting*), click on the radio button in the "Subsystem" field that identifies which worksheet the action will be assigned.

Click on the drop-down arrow next to "Select Folder" to assign an action to an existing folder.

Click on the radio button next to if you are creating a new folder. Click OK and EAS will return to the *Supervision Worksheet*.

Supervision Worksheet

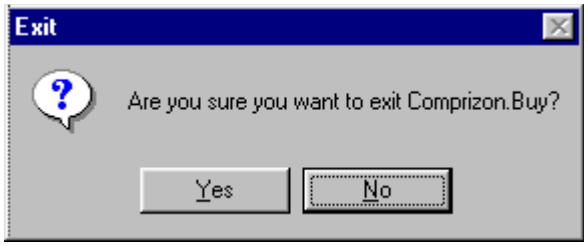


The action will no longer appear. Click on in the upper right-hand corner to exit and return to the EAS desktop.

EAS Desktop

Click on in the upper right-hand corner to exit EAS. An E*xit Prompt Box* may appear.

Exit Prompt Box



Indicate “Yes” to exit the desktop or “No” to continue working on the desktop.