# Creating a Requisition in STRIPES

# 1.2 Creating a Requisition in STRIPES

## *Purpose:*

This user guide will show you how to create a Requisition in STRIPES.

## *Before You Start:*

1. In order to create a Requisition you must be a *Requisitioner*.
2. Click **Help** on the STRIPES toolbar for on-line, context sensitive help. This on-line help may not reflect some DOE/STRIPES configurations and policies.

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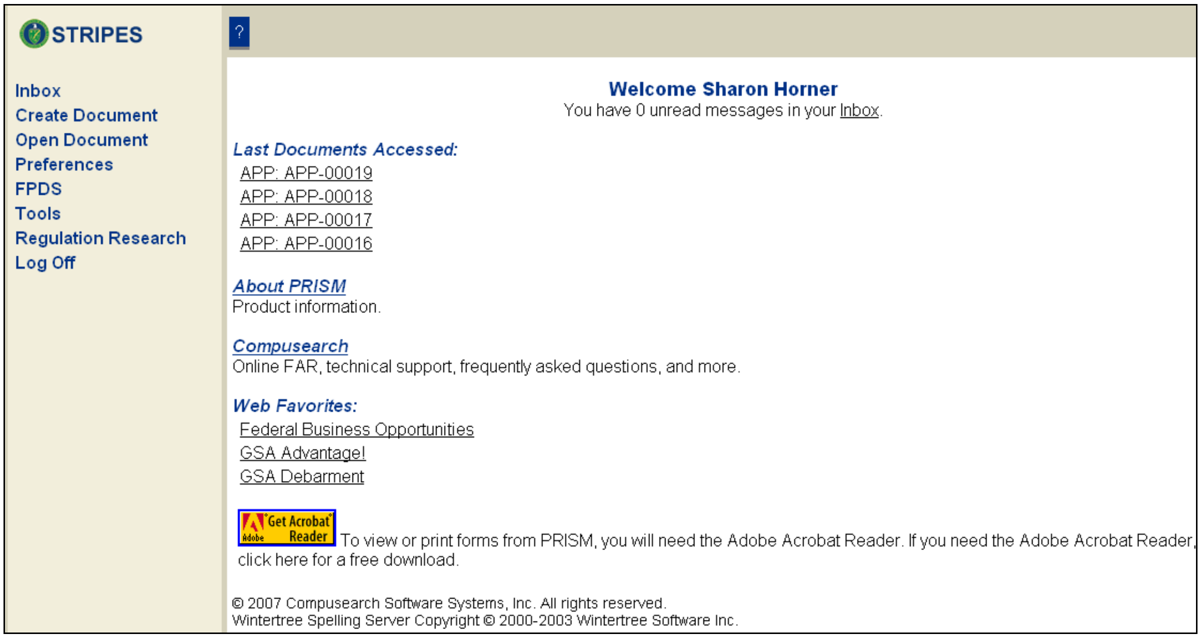
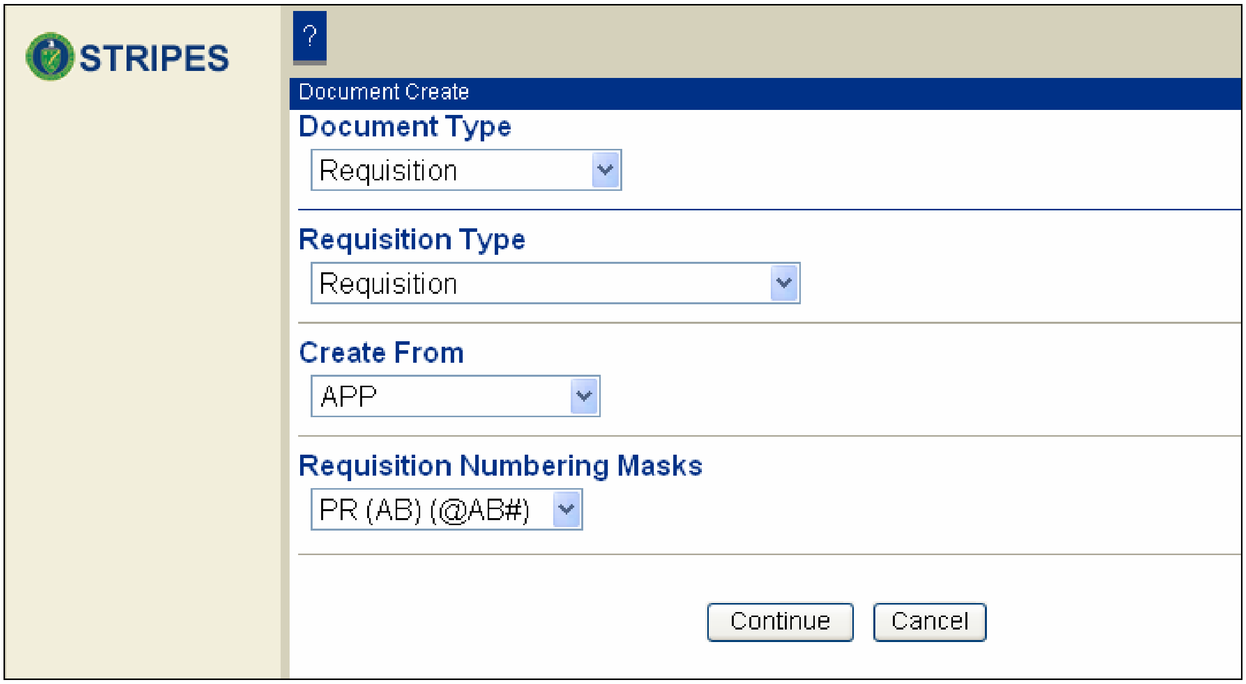
Your Notes

## *Steps:*



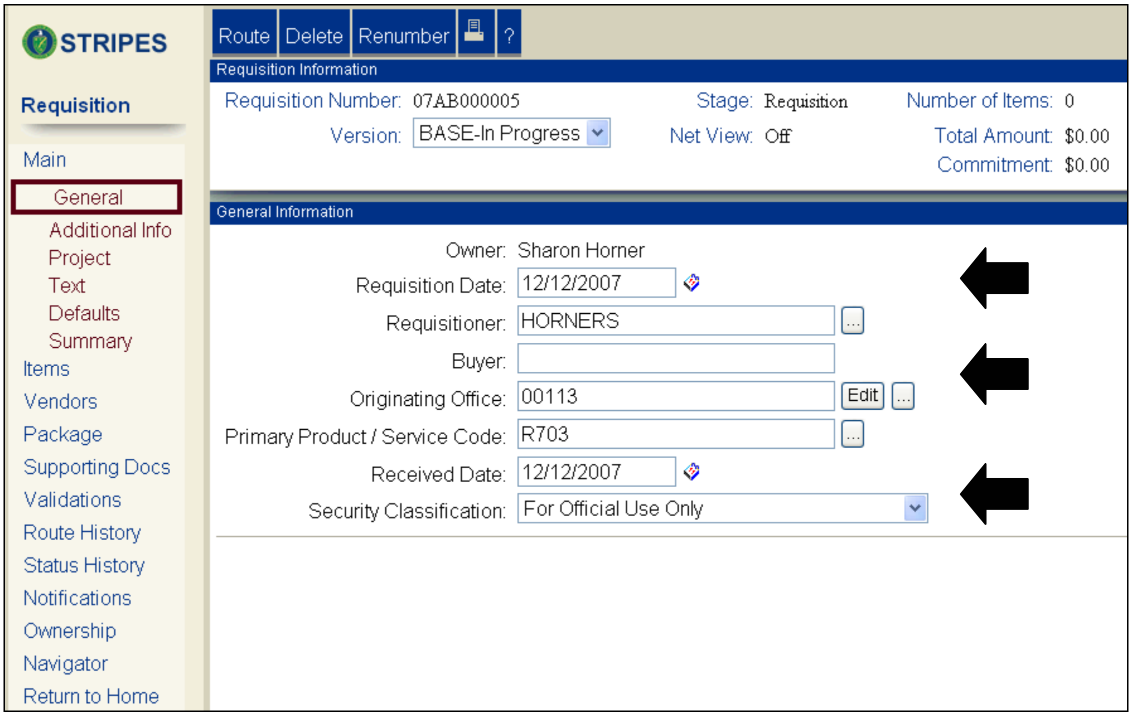

***Welcome Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 1. | *STRIPES Sign-On* | Log on to STRIPES. | |
| 2. | *Welcome* | Click the **Create Document** menu option. | |



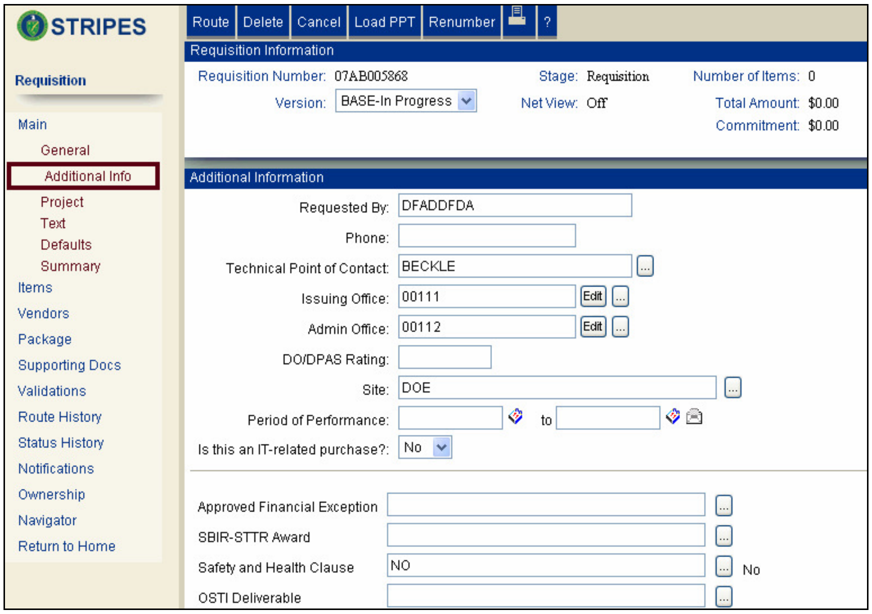

***Document Create Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 3. | *Document Create* | The *Document Create* page displays.<br>• **Document Type:** Select **Requisition**.<br>• **Requisition Type:** Select **Requisition**.<br>• **Create From:** Select **APP**.<br>• **Requisition Numbering Masks:** Select **Requisition Numbering Mask**.<br>• Click the **Continue** button. | • Requisitions are to be used for all DOE awards made.<br>• Requisitions will also have a Milestone Plan and an Advanced Procurement Plan (APP) associated with them. |




***General Information Page***

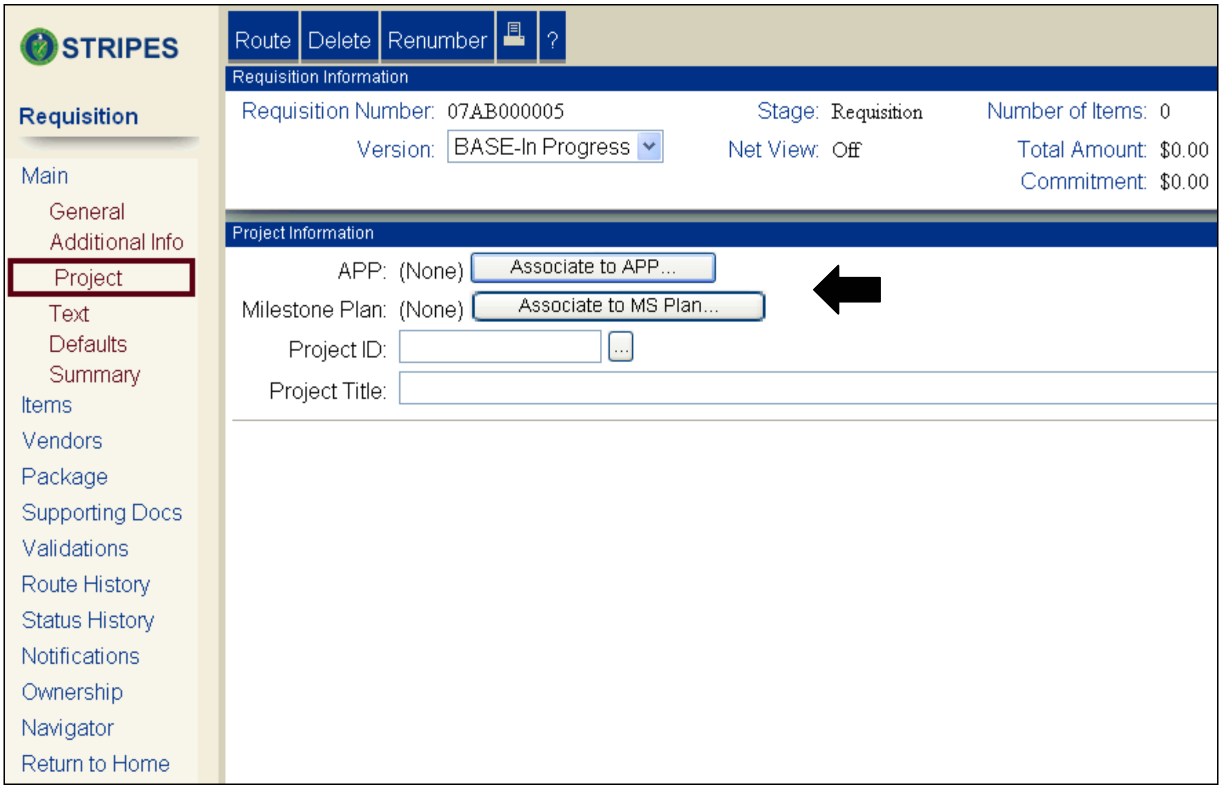
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 4. | *General Information* | The *General Information* page displays. Fill in the following fields as needed.<br>• **Requisition Date:** (Required) Enter today's date.<br>• **Buyer:** (Disabled) This information will be entered by the Workload Point of Contact.<br>• **Originating Office:** (Optional) Select originating office code.<br>• **Primary Product/Service Code:** (Optional) Select a Product/Service Code.<br>• **Received Date:** (Optional) The date the request was made.<br>• **Security Classification:** (Required) Select the appropriate security designation from the drop-down list. | • STRIPES will pre-fill the following fields:<br>- **Requisitioner**<br>- **Owner**<br>• It is not mandatory to enter a Product/Service Code here until the Award. The Primary Product/Service Code is mandatory at the Item level. |
| 5. | *General Information* | • Click the **Additional Info** menu option to continue. | |




***Additional Information Page***

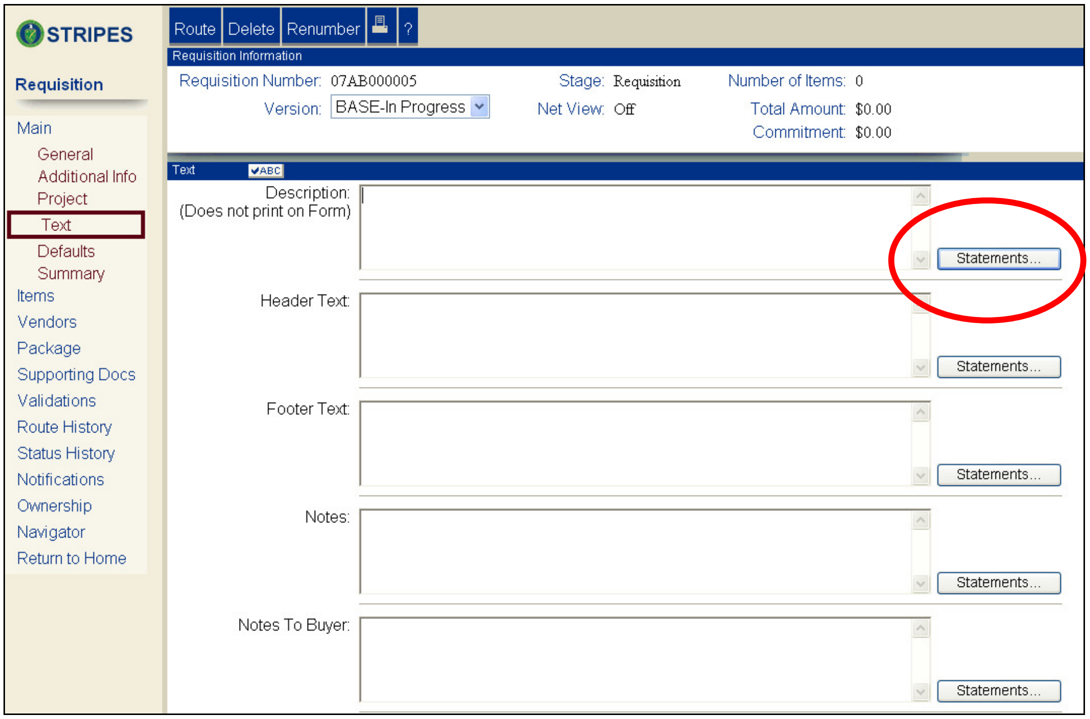
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 6. | *Additional Information* | The *Additional Info* page contains more information that applies to the entire Requisition. Fill in the following optional fields as needed.<br>• **Requested By:** Enter the name of the person who initiated this Requisition.<br>• **Phone:** Enter the phone number of the person who initiated this Requisition.<br>• **Technical Point of Contact:** Select a Technical Point of Contact.<br>• **Issuing Office:** Select the code of the office that is issuing this Requisition.<br>• **Admin Office:** Select the code of the office that will administer this Requisition.<br>• **Period of Performance:** Select the estimated period of performance. | • **DO/DPAS Rating:** Not currently being used by DOE<br>• STRIPES will pre-fill the following field:<br>- **Site** - Site is based on the Head of Contracting Authority (HCA).<br>- **IT-Related Purchase**<br>• The **Period of Performance** dates are the *Effective Date* and the *Completion Date* of the action.<br>• **SBIR-STTR Award**, **Safety and Health** and **OSTI Deliverable** all auto-populate from the APP. |

| | | | |
|---|---|---|---|
| 7. | | • **Is this an IT-related purchase?:** Select **Yes** or **No**.<br>• **Approved Financial Exception:** Select the exception if applicable.<br>• **SBIR-STTR Award**: (Optional) Fill this out to indicate a Small Business Innovative Research Program or Small Business Technology Transfer Program award.<br>• **Safety and Health**: (Optional) Defaults to NO. Change this field to yes if procuring safety equipment.<br>• **OSTI Deliverable**: (Optional) Enter the 2-character code that corresponds to the scientific/technical reporting deliverables if procuring for the Office of Scientific and Technical Information. | |
| 8. | *Additional Information* | • Click the **Project** menu option to continue. | |



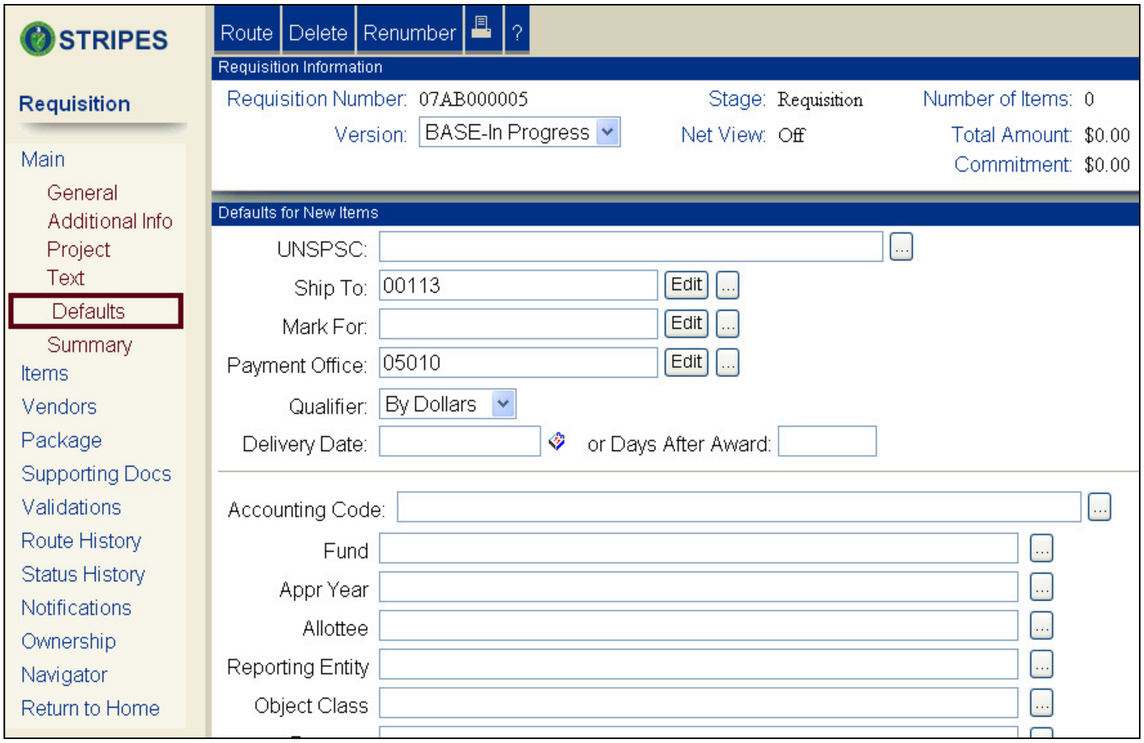

***Project Information Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 9. | *Project Information* | The *Project Information* page displays. Fill in the following optional fields as needed:<br>• **Project ID:** A work plan can be labeled in STRIPES.<br>• **Project Title:** Enter a brief description to be used for the ID labeling. | • **APPs and Milestone Plans** can be associated to the Requisition from this page.<br>• See STRIPES user guide sections **Creating an APP in STRIPES** and **Creating a Milestone Plan in STRIPES** for more information. |
| 10. | *Project Information* | • Click the **Text** menu option to continue. | |




***Text Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 11. | *Text* | The *Text* page displays. Use the *Text* page to enter text that applies to all line items in the Requisition. Fill in the following fields as needed:<br>• **Description:** (Required) At least 5 characters must be added to this field.<br>• **Header Text:** Will print out at the top of each page.<br>• **Footer Text:** Will print out at the bottom of each page.<br>• **Notes:** Will not print on the Requisition.<br>• **Notes to Buyer:** Notes from the Requestor to the Contract Specialist, or Contracting Officer.<br>• Click the **Statements** buttons to insert standard text into your Requisition. | • The **Description** and **Notes** will not print on the Requisition.<br>• You can cut and paste text from other documents into the STRIPES text fields.<br>• Each text fields hold 32,000 characters. This is the equivalent to 7 - 8 single-spaced typed pages.<br>• Header and footer text entered on the **Main** page will appear on each page of the Requisition, and is the same for all items in the document.<br>• Header and footer text entered on the **Item** page will appear with each item, and can be different for each item in the Requisition. |
| 12. | *Text* | • Click the **Defaults** menu option to continue. | |

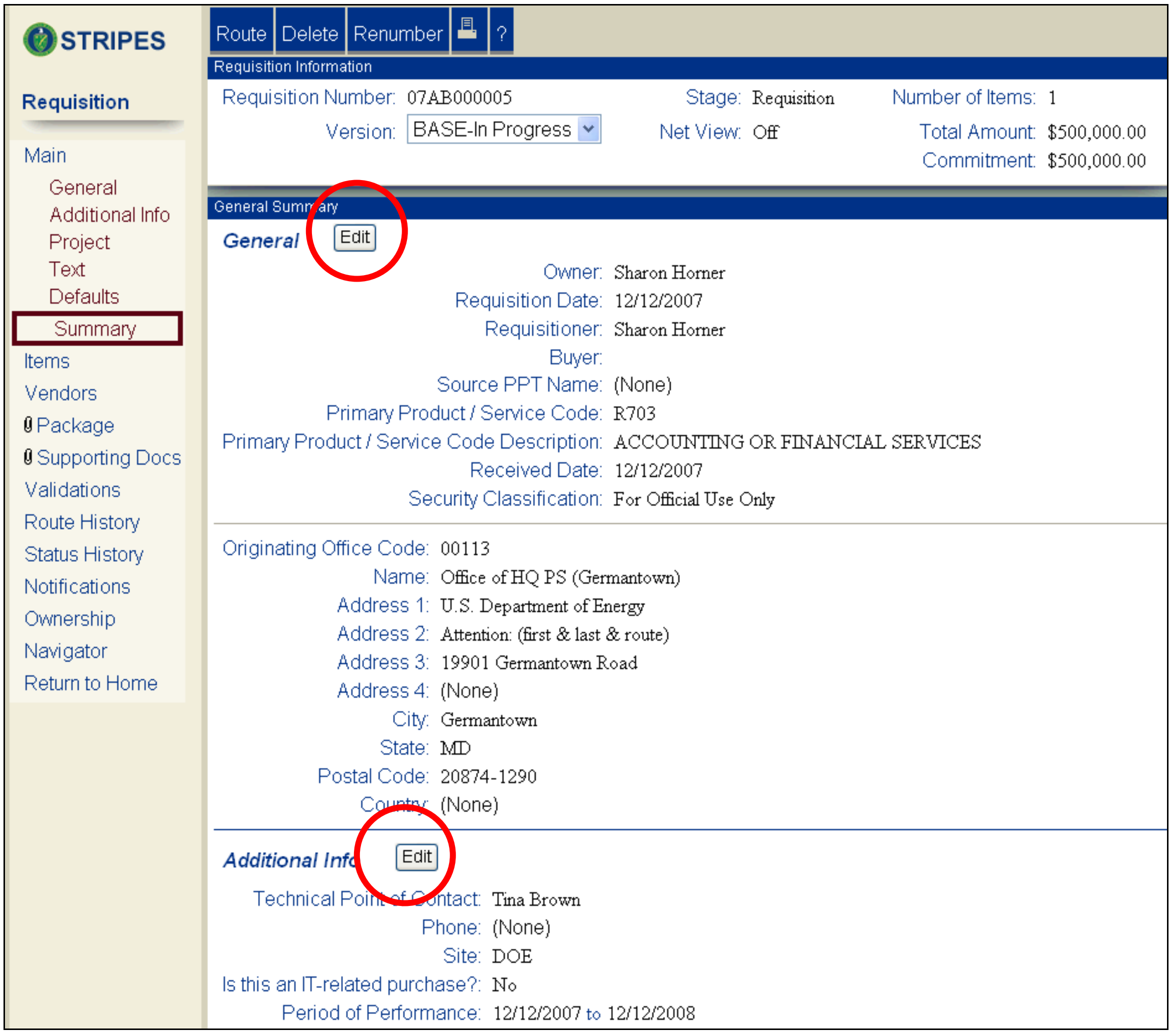



***Defaults for New Items Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 13. | *Defaults for New Items* | The *Defaults for New Items* page displays. Use this page to enter information that will be the same for every line item in the Requisition.<br>• **UNSPSC: United Nations Standard and Service Product Codes.** Select a Product Code.<br>• **Ship To:** Select a delivery office.<br>• **Mark For:** Select the office that will actually receive the items or service, if it differs from the **Ship To** location.<br>• **Payment Office:** Select the office that will make payments for this action.<br>• **Qualifier**: Select **By Dollar** to enter the total dollar amount of each of your line items; select **By Quantity** to specify the number of things you want to buy in each line item.<br>• **Delivery Date:** Choose a default delivery date, or specify delivery for a certain number of days after the award. | • You can skip this page, but not using defaults will force you to enter in this information for each line item.<br>• The **Mark For** address is the location where the items will be sent after they are delivered to the **Ship To** location.<br>• Only select a **Qualifier** if all line items will be purchased by quantity or dollar. |

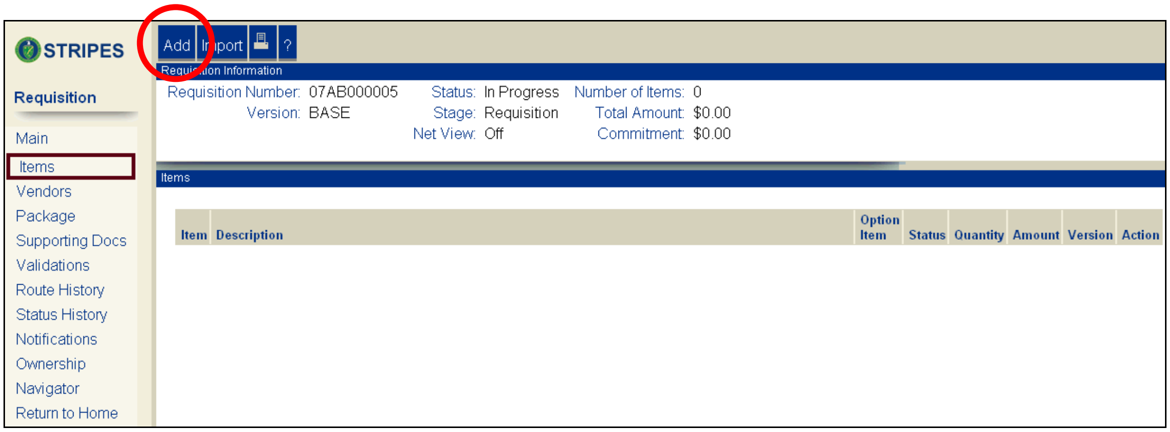
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 14. | *Defaults for New Items* | Complete the **Accounting Information** section by selecting an entry for the following STARS control segments:<br>• **Accounting Code**: preloaded templates that will automatically fill in other accounting fields.<br>• **Fund** identifies the fund type and appropriation for funds control and statutory reporting.<br>• **Appr (Appropriation) Year** identifies the four-digit year in which funding is appropriated.<br>• **Allottee** represents the allottee to which funds are distributed by the headquarters budget. The ranges for this segment are established by cluster.<br>• **Reporting Entity** uses roll-up groups and groups allottee-specific information. Security rules will control the values available per allottee. The ranges for this segment are established by allotee to differentiate between integrated contractor and DOE direct activity.<br>• **Object Class** uses roll-up groups that represent the three-digit object class and the two-digit DOE sub-object class.<br>• **Program** uses roll-up groups to represent the current Budgeting and Reporting (B&R) code structure and has numerous parent/child relationships, which include Hierarchical, Program Goals, Department Goals, Congressional Control Level, Targets, and Assistant Secretary.<br>• **Project** Provides a project structure that is independent of the other classification structures to allow multiple organizations, programs, and funding sources to be associated with a specific project.<br>• **WFO (Work for Others)** identifies the Reimbursable Work Orders, Intra-Office Work Orders, and Inter-Office Work Orders. The ranges for this segment are established by allottee.<br>• **Local Use** uses roll-up groups and represents the Local Project, Local B&Rs, and Cost Center breakdowns for project/program activity. It includes actual General Plant Project (GPP)/General Plant Equipment (GPE) numbers, captures WAPA Fund, and has the flexibility to provide lower level information. | • If you do not know the correct accounting codes for this Requisition, contact your financial management office for the funding information.<br>• If accounting codes are not correct, any documents created from this Requisition will not be posted in STARS. |

| | | | |
|---|---|---|---|
| 15. | *Defaults for New Items* | • Click the **Summary** menu option to continue. | |




***General Summary Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 16. | *General Summary* | The *General Summary* displays all the header level information on this Requisition.<br>• The **Edit** buttons allow you to navigate directly to the corresponding portion of the document to make changes. | |
| 17. | *General Summary* | • Click the **Items** menu option to continue. | |



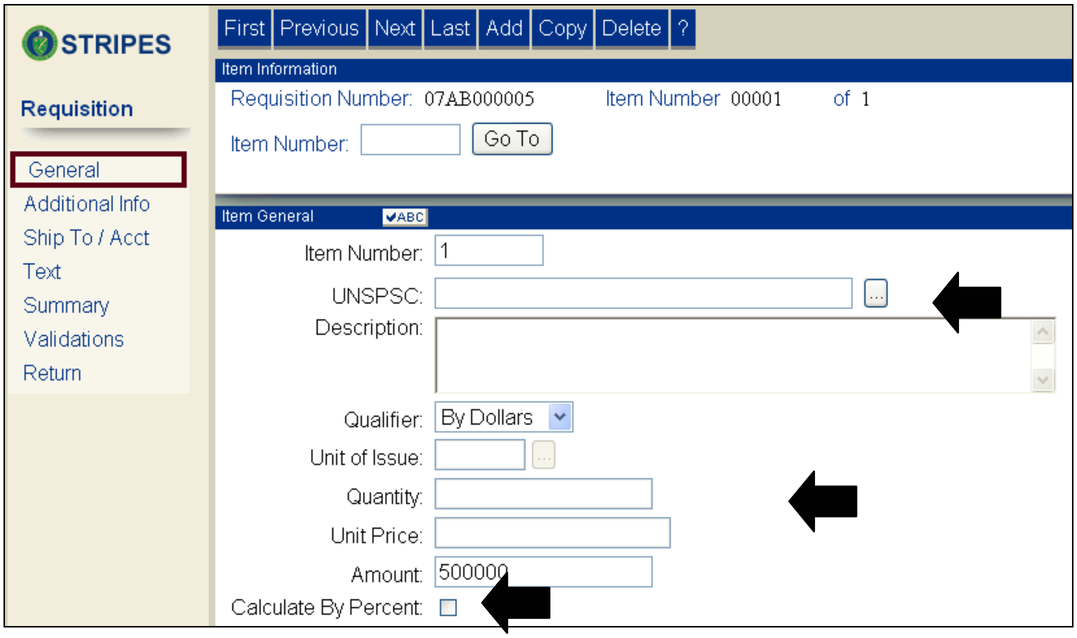

***Items Page***

## Page Features

The *Items* page displays.

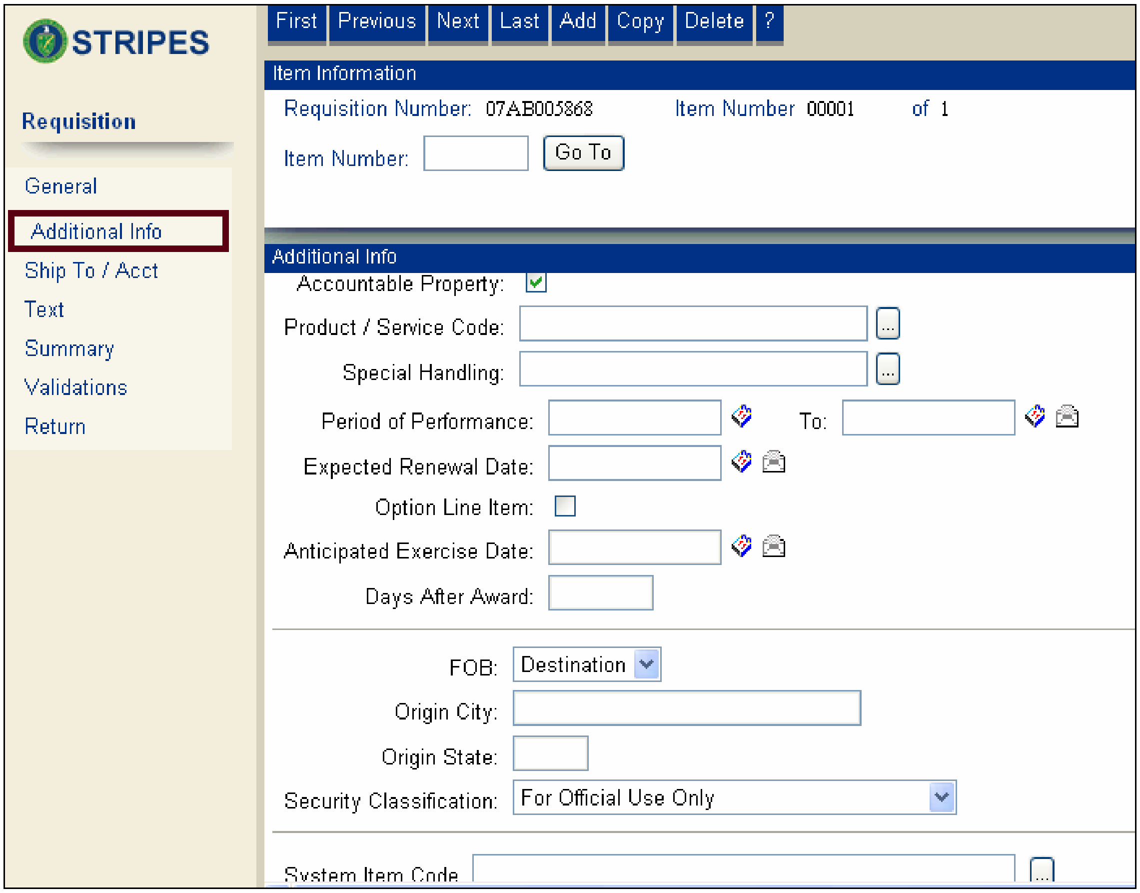
- **Item:** Displays the system generated number.
- **Description:** Displays a description for each line item in the list.
- **Option Item:** Displays **Y** if the line item is an option line item that can be exercised in future fiscal years. Otherwise, this column is blank. The **Option Item** column corresponds to the setting in the *Option Line Item* field on the *Additional Information* page at the item-level. If you check the box in the *Option Line Item* field on the *Additional Information* page, **Y** displays in the **Option Item** column on this page.
- **Status**: Indicates the document's place in the creation and approval process.
- **Quantity:** Displays the quantity on order for each line item.
- **Amount:** Displays the total dollar amount for each line item.
- **Version:** Displays **Base** if this line item is part of the original document. If this is a modification, the modification number is displayed.
- **Action**: Displays a message to indicate whether the version of the document that displays in the *Version* column has been added, edited, modified, or deleted. The **Action** column is especially useful when Net View is turned off and you are looking at amendments or modifications.
  - Displays **Add** if the line item was added to the current version.
  - Displays **Edit** if the line item was added on a prior version but was modified on this version.
  - Displays **Cancel** if the line item was canceled on this version.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 18. | *Items* | • Click the **Add** button to add a line item to this Requisition. | |




***Item General Page***

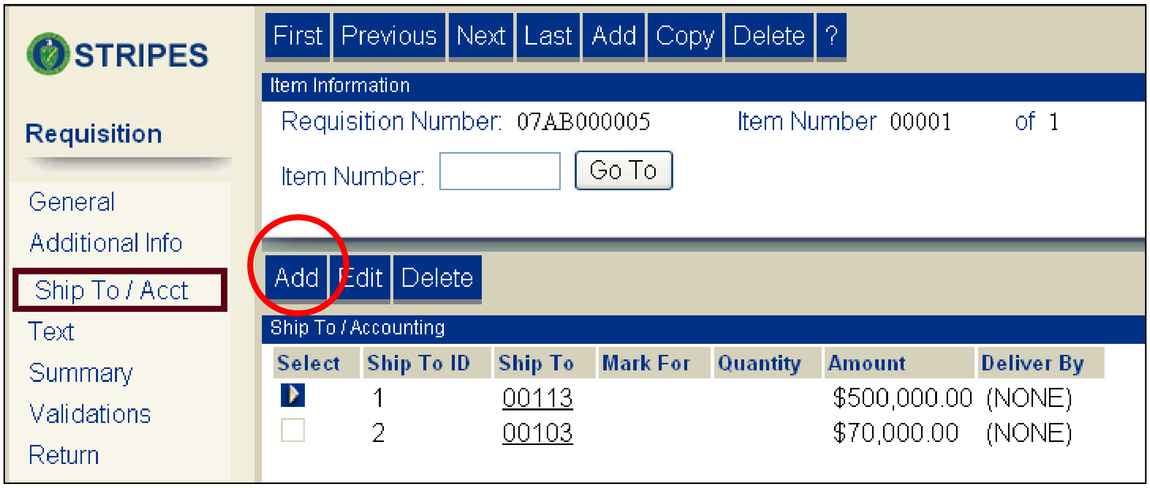
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 19. | *Item General* | The *Item General* page displays.<br>• **UNSPSC:** Select a product code.<br>• **Description:** Enter a brief description of the item or service.<br>• **Qualifier**: Select **By Dollar** to enter the total dollar amount; select **By Quantity** to specify particular items.<br>• **Quantity:** Enter the quantity requested in the field.<br>• **Unit Price:** Enter the price for each unit in the field.<br>• **Calculate By Percent:** Select this checkbox if this line item will be funded by more than one funding source. | • STRIPES will fill in the **Item Number** field automatically. Auto-numbering is the default. While the number can be changed, it is not recommended.<br>• The **Product/Service Code** defaults from the *General Information* page.<br>• If you select **Qualifier**: **By Dollar**: Enter the total dollar amount of the line item in the **Amount** field.<br>• Selecting **By Dollar** will render the **Unit of Issue**, **Quantity**, and **Unit Price** read-only.<br>• If you select **Qualifier**: **By Quantity**: You must select a **Unit of Issue**.<br><br>***NOTE:*** When entering dollar amounts in STRIPES, do not include commas or decimal points where cents equals 0. For example, $50,000.00 would be entered as 50000. |
| 20. | *Item General* | • Click the **Additional Info** menu option to continue. | |




***Additional Info Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 21. | *Additional Info* | The *Additional Info* page contains basic information about this line item. The following fields are all Optional.<br>• **Accountable Property:** Select this checkbox if this item is accountable property.<br>• **Product/Service Code:** This will default from the header.<br>• **Special Handling:** Select a code if this item requires special handling.<br>• **Period of Performance:** This will default from the header page. | STRIPES will pre-fill the following fields:<br>• **Product / Service Code**<br>• **Period of Performance**<br>All fields on the Additional Info page are optional on Requisitions. |

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 22. | *Additional Info* | Fill out the following fields if you know this will be an Option Line Item:<br>• **Expected Renewal Date:** Enter the date you expect to renew this action.<br>• **Option Line Item:** Do not select this checkbox. The option line items will be recorded on the award by the Contracting Officer or Contract Specialist.<br>• **Anticipated Exercise Date:** Will be filled in by the Contracting Officer or Contract Specialist when exercising an option line item.<br>• **Days After Award:** Will be filled in by Contracting Officer or Contract Specialist when exercising an option line item. | |
| 23. | *Additional Info* | Enter shipping information in the lower section of the *Additional Info* page.<br>• **FOB:** Select an option if this item has Free On Board shipping.<br>• **Origin City** and **Origin State:** If the FOB is *Origin*, state where the item is coming from.<br>• **Security Classification:** Select the appropriate security classification.<br>• **System Item Code:** Enter if applicable to task, subtask, and activity values for NETL major site support contracts and Permanent Change of Station (PCS) expense codes used department-wide. | |
| 24. | *Additional Info* | • Click the **Ship To / Acct** menu option to continue. | |



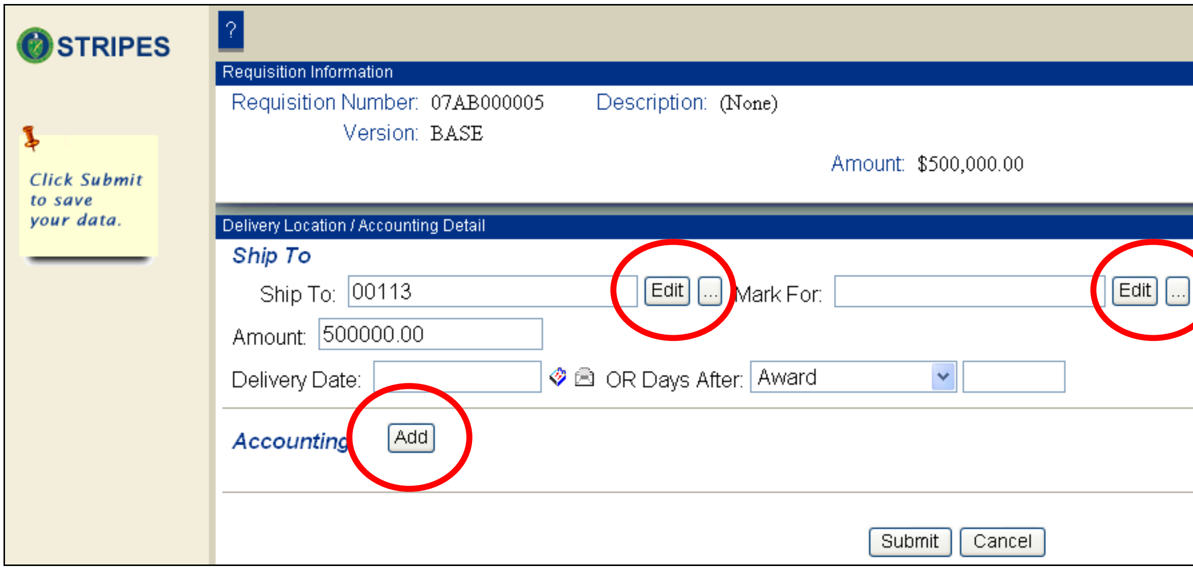

***Ship To/Accounting Page***

**Page Features**

The *Ship To/Accounting* page displays. Use this page to view and add **Ship To** addresses for line items.

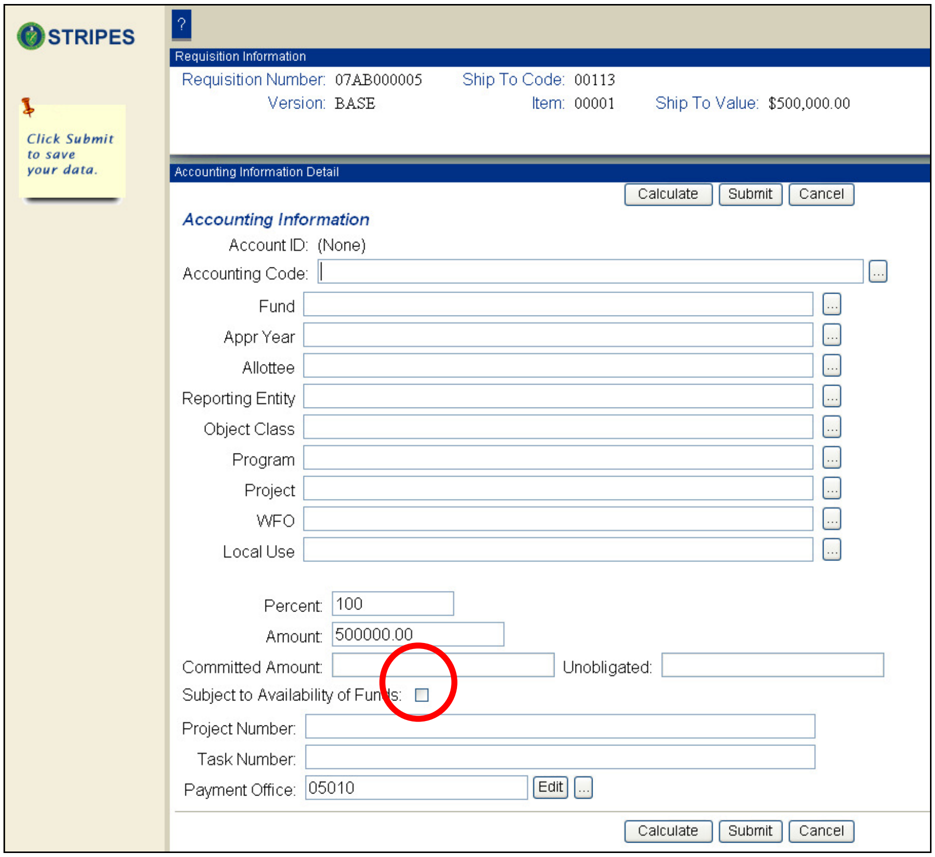
- **Select:** Click the box to select a line item for further action.
- **Ship To ID:** Displays a number that indicates the line item's place in the list. For example, it displays 1 for the first line item in the list, and 7 for the seventh, etc.
- **Ship To**: Displays the ship to code that was set up for the line item on the Delivery Location/Accounting Detail page.
  *NOTE:* The Ship To is usually the office location to which the line item should be sent.
- **Quantity:** Displays the quantity on order for each line item.
- **Mark For**: Displays the final destination code for each line item in the list, provided there is a Mark For address related to the **Ship To** address.
- **Amount:** Displays the total dollar amount for each line item.
- **Deliver By:** Displays the date each line item must be delivered to each **Ship To** in the list provided a date was set up in the **Delivery Date** field in the *Delivery Location/Accounting Detail* page.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 25. | *Ship To/ Accounting* | • Click the **Add** button to add a **Ship To** address to this line item. | |




***Delivery Location/Accounting Detail Page***

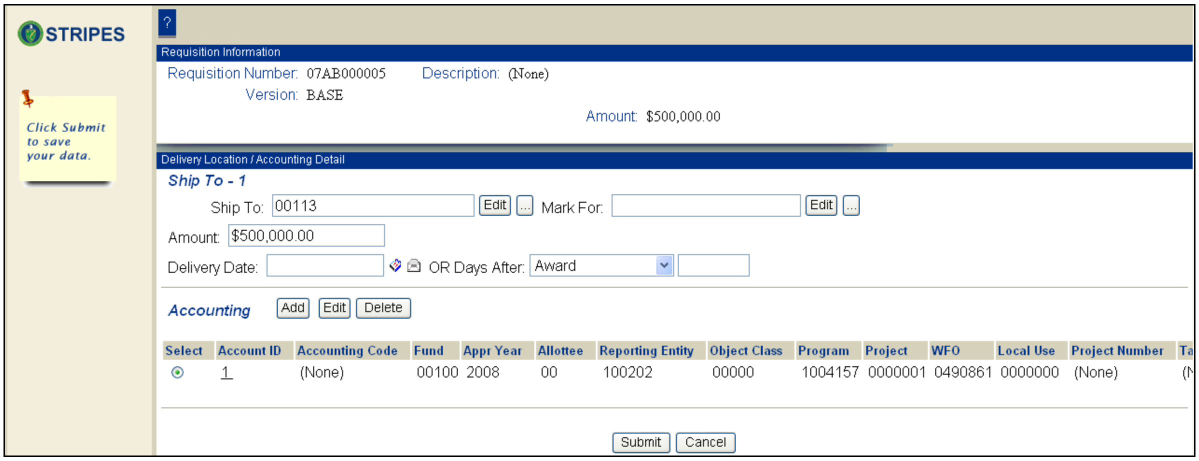
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 26. | *Delivery Location / Accounting Detail* | The *Delivery Location / Accounting Detail* page displays.<br>• The **Ship To** and **Mark For** addresses will default from the header-level information. You can click the **Edit** buttons to change them.<br>• Enter a dollar amount for this **Ship To** address in the **Amount** field (Required). | • Each line item can have multiple **Ship To** addresses.<br>• Each line item **Ship To** address can have multiple accounting lines.<br>• Ship To information is required. |
| 27. | *Delivery Location / Accounting Detail* | • **Delivery Date** or **Days After (Award Notice to Proceed, or Reciept of Order)** When product or service will be delivered. This field will default from the header level. | At least one of these fields is required. |
| 28. | *Delivery Location / Accounting Detail* | • Click the **Add** button to add accounting information to this line item. | |




***Accounting Information Detail Page***

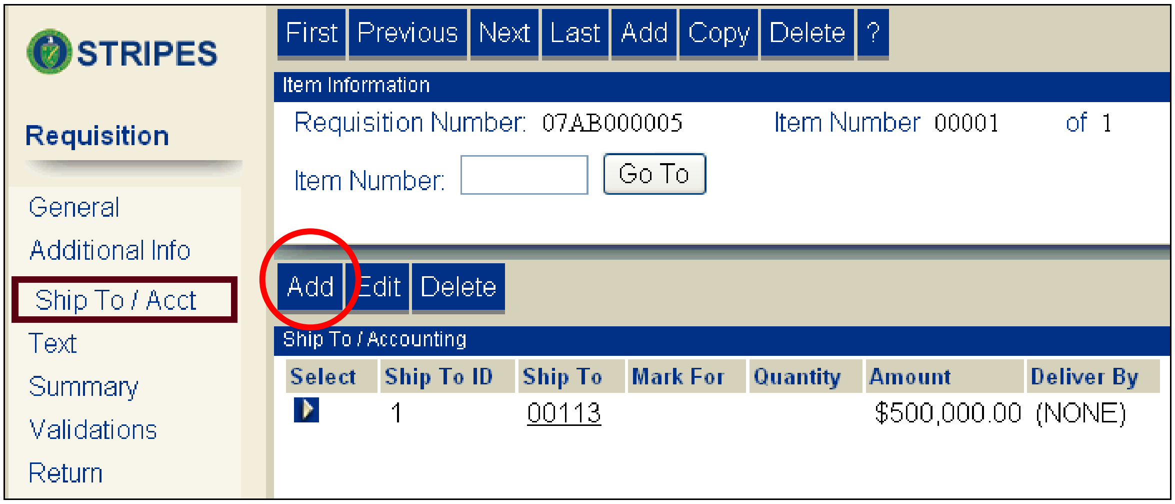
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 29. | *Accounting Information Detail* | The *Accounting Information Detail* page displays. Information will default from the header.<br><br>In order to process a Requisition, you must enter a complete set of STARS codes for each fund site. | • Your Budget Office is responsible for providing the STARS fund site.<br><br>• If you do not know the correct accounting codes for this request, you can leave these fields blank and let your Budget Office fill them out when you route this Requisition for review. |

| Steps | Page | User Action | Notes |
| --- | --- | --- | --- |
| 30. | *Accounting Information Detail* | • If you checked the **Calculate By Percent** box earlier (Step 18), you need to enter a value in the **Percent** field. STRIPES will calculate the dollar value based on the line item's overall dollar value.<br>• If you did not check the **Calculate By Percent** box earlier, the line amount defaults in the **Amount** field.<br>• **Subject to Availability of Funds:** STRIPES will not commit funds if you check this box.<br>• **Project Number** and **Task Number:** (Optional) Use these fields to label and identify certain policy criteria.<br>• The **Payment Office** (Required) defaults from the header. | See Step 13 for the definition of preceding fields.<br>• **Committed Amount** and **Unobligated** are read-only fields that will fill in automatically when you click the **Calculate** button. |
| 31. | *Accounting Information Detail* | • Click the **Calculate** button to have STRIPES calculate what percent of the entire Ship To address amount is funded by this site. | |
| 32. | *Accounting Information Detail* | • Click the **Submit** button to save this accounting information for this Ship To address. | |



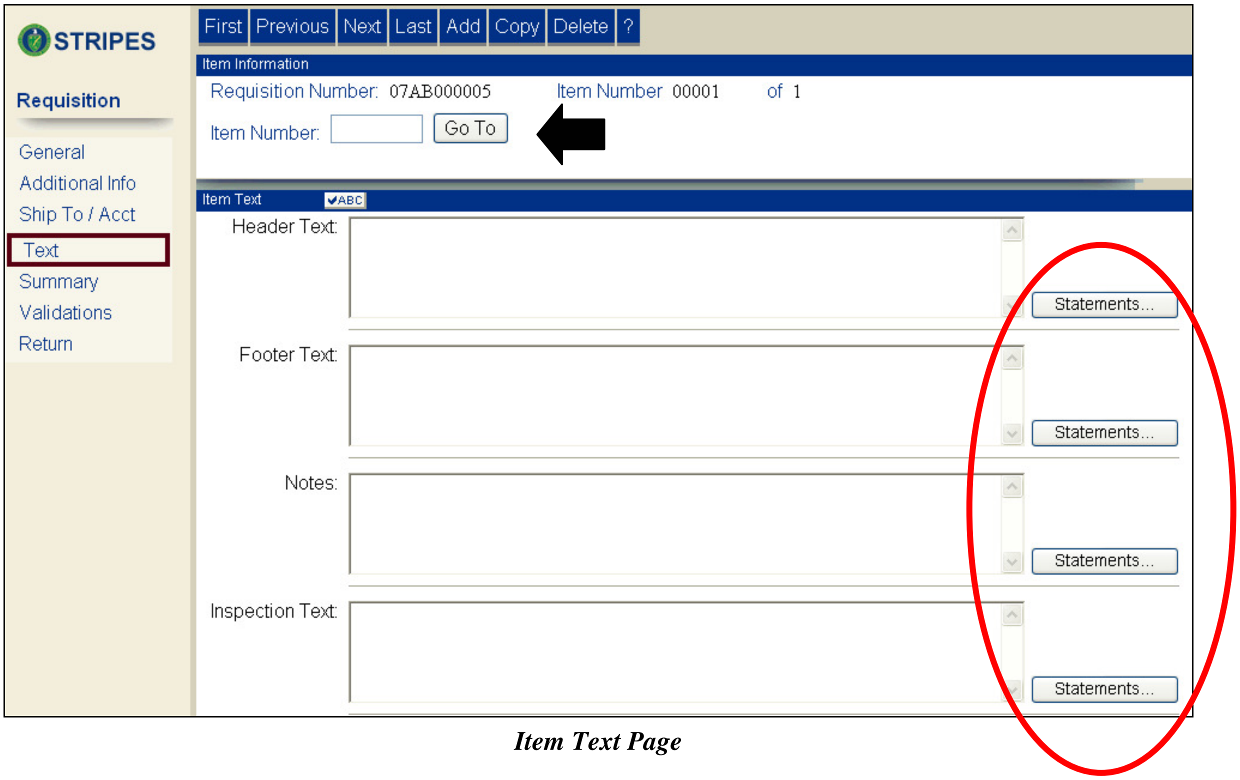

***Delivery Location/Accounting Detail Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 33. | *Delivery Location / Accounting Detail* | The new accounting information displays in the **Accounting** section of the *Delivery Location / Accounting Detail* page.<br>• To add more accounting lines to this Ship To address, click the **Add** button and repeat the steps shown above. You can add multiple accounting lines to a single Ship To address.<br>• Click **Submit** to save your data. | |



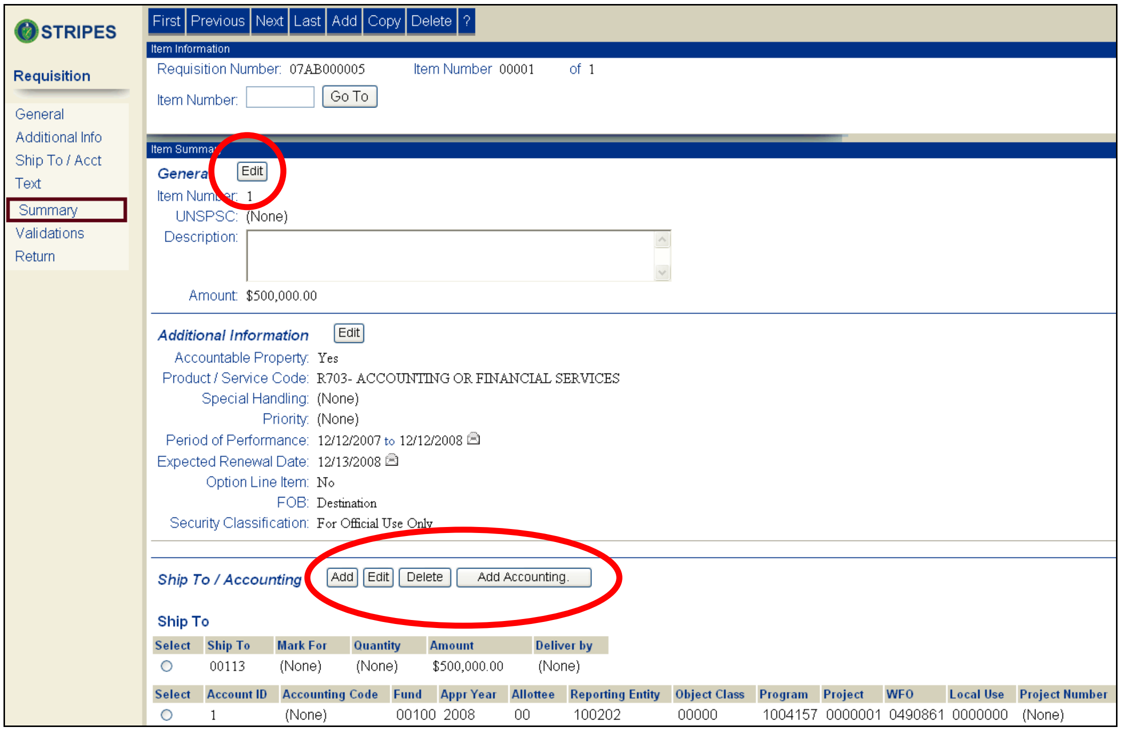

***Ship To/Accounting Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 34. | *Ship To/ Accounting* | STRIPES returns to the *Ship To/Accounting* page.<br>• Click the **Add** button to add another **Ship To** address for this Requisition line item. | See Step 27 for instructions on adding an another **Ship To** address. |
| 35. | *Ship To/ Accounting* | • After entering **the Ship To** addresses with accounting information for this line, click the **Text** menu option to continue. | |



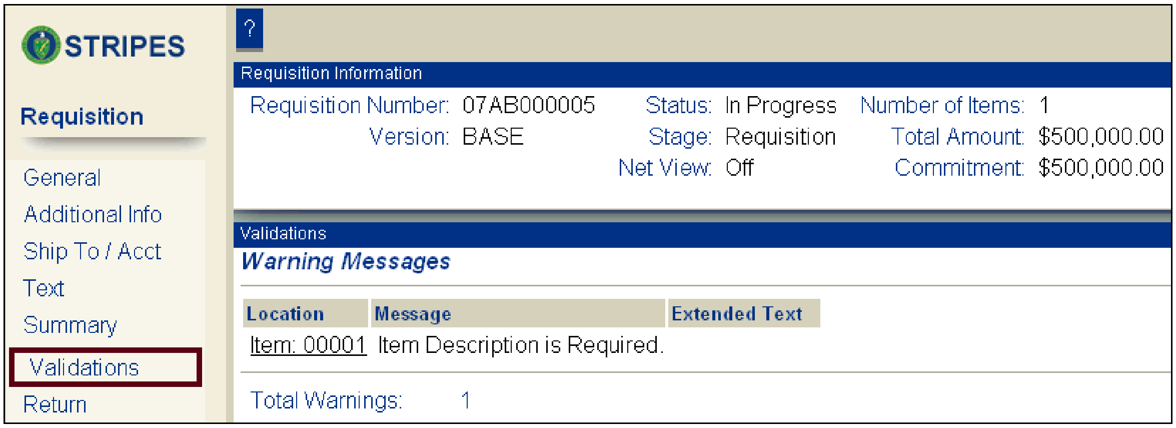

***Item Text Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 36. | *Item Text* | The *Item Text* page displays. Use this page to enter text that only applies to this particular line item.<br>• **Header Text:** Will print out at the top of the line item.<br>• **Footer Text:** Will print out at the bottom of the line item.<br>• **Notes:** Will not print on the Requisition and can only be viewed by STRIPES users.<br>• **Inspection Text:** Will not print on the Requisition and can only be viewed by STRIPES users. | • Use the **Go To** feature to go directly to a specific line *Item General* page.<br>• You can cut and paste text from other documents into the STRIPES text fields.<br>• Click the **Statements** buttons to view lists of standard content that you can insert in your Requisition. |
| 37. | *Item Text* | • Click the **Summary** menu option to continue. | |

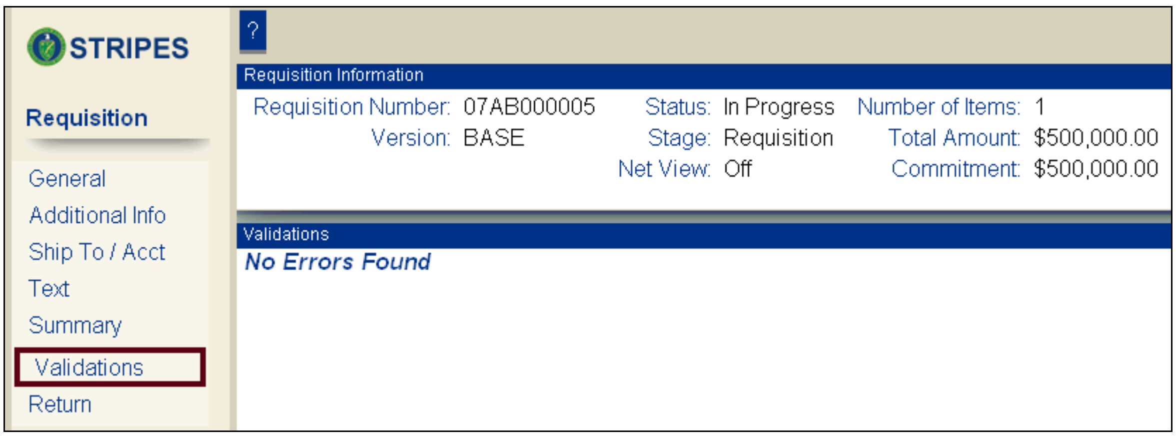



***Item Summary Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 38. | *Item Summary* | The *Item Summary* page displays. Review the *Item Summary* page to see if the information about this line item is accurate.<br>• Click the **Add** or **Edit** buttons to add or change the item information.<br>• Click the **Add Accounting** button to add accounting information to a selected item. | |
| 39. | *Item Summary* | • Click the **Validations** menu option to continue. | |

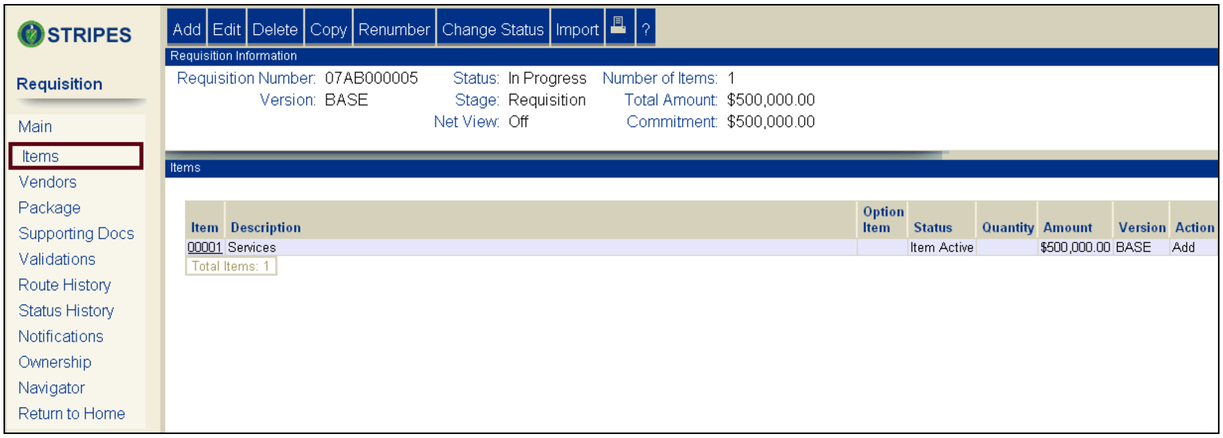



***Validations Page Warning Messages***



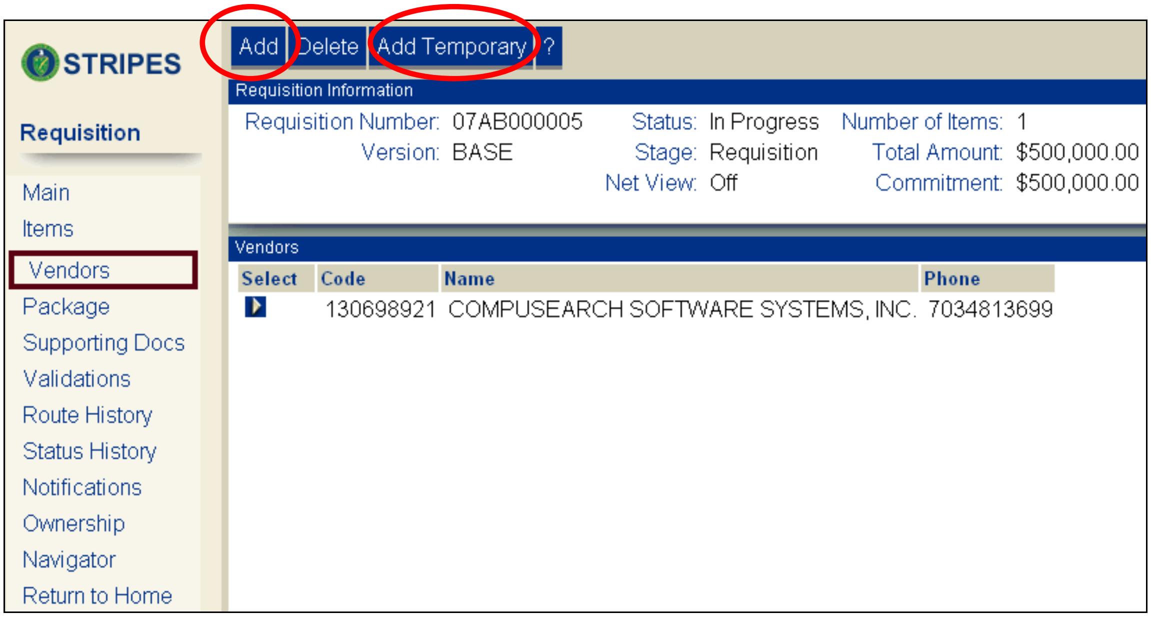

***Validations Page No Errors Found***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 40. | *Validations* | STRIPES validates the Requisition line item.<br><br>The *Validation* page displays with a list of *Error Messages* and/or *Warning Messages* for this particular line item.<br><br>• Click the links under the **Location** column to go to the location of the error or warning. Correct the errors or warnings and click the **Validate** menu option again to re-validate the line item. | • *Error Messages* must be corrected to continue.<br><br>• *Warning Messages* do not have to be corrected to continue.<br><br>• If you did not fill in the STARS fund site in the Accounting Information section, you will receive several Error Messages about these missing values. You can still route this Requisition to your Program Manager with these STARS fund site errors. |
| 41. | *Validations* | • Click the **Return** menu option to continue. | |



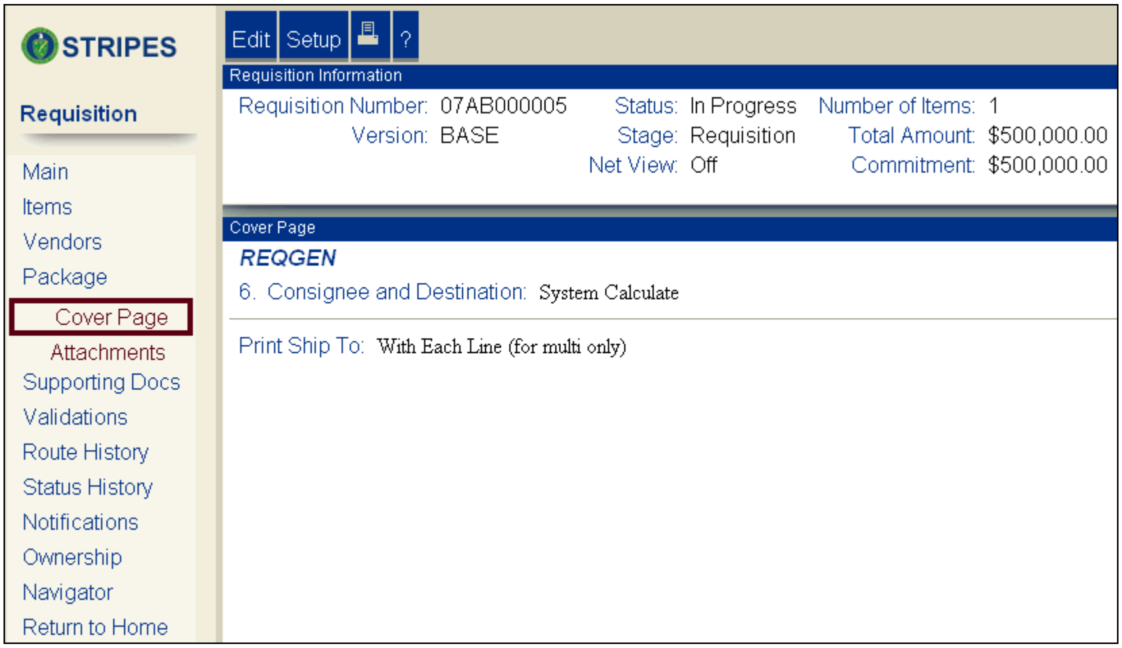

***Items Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 42. | *Items* | You are returned to the *Items* page. To cancel an item on an **In Progress** Requisition:<br>• Select the item and click the **Change Status** button. The *Change Item Status* page will open with the **Suspend** option selected.<br>  • To cancel an item, change the default selection from **Suspended** to **Cancel**.<br>• Click **Submit** to continue.<br>• STRIPES will confirm your action and then return to the *Items* page where the status of the item will now be **Suspended** or **Canceled**. | • Suspending an item will prevent any access to its funding. Click Change Status again to bring the Item Status back to Active.<br>• Cancelling an item will de-commit all funds associated with the item. You may uncancel an item, but all financial information will have to be re-entered. |
| 43. | *Items* | • Click the **Vendors** menu option to continue. | |



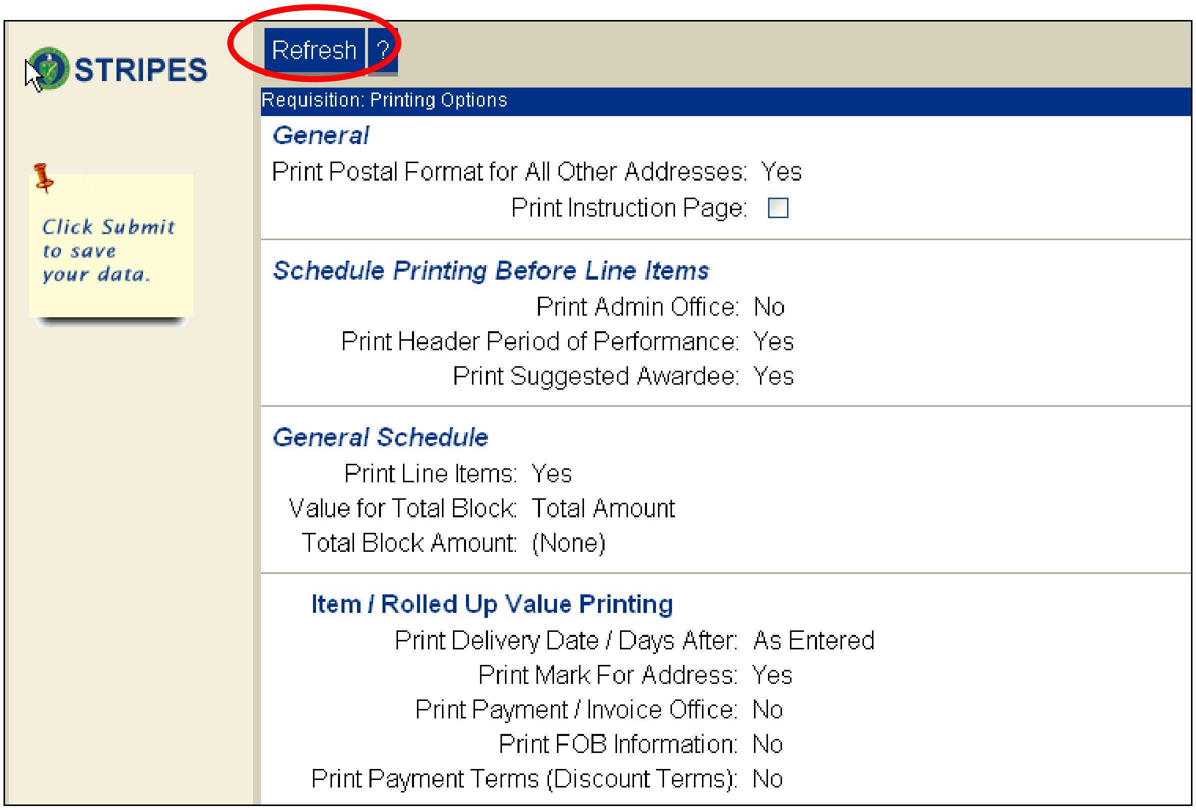

***Vendors Page***

| Steps | Page | User Action | *Notes* |
|---|---|---|---|
| 44. | *Vendors* | The *Vendors* page displays.<br>To add a **Permanent Vendor** to a Requisition:<br>• Click the **Add** button.<br>• Search for a vendor and click a vendor code to select it.<br>To add a **Temporary Vendor** to a Requisition:<br>• Click the **Add Temporary** button.<br>• Type in the requested vendor information in the available fields. | • Vendors are not required on Requisition documents. If the Requisition is for sole source procurement, select the vendor. For competitive procurements, the vendor ultimately selected will be entered by the Contract Specialist.<br>• Permanent Vendors come from the CCR database and are updated real time and can be used on all STRIPES transactions. |
| 45. | *Vendors* | • Click **Submit** to return to the *Vendors* page. | |
| 46. | *Vendors* | • Click the **Package** menu option to continue. | |



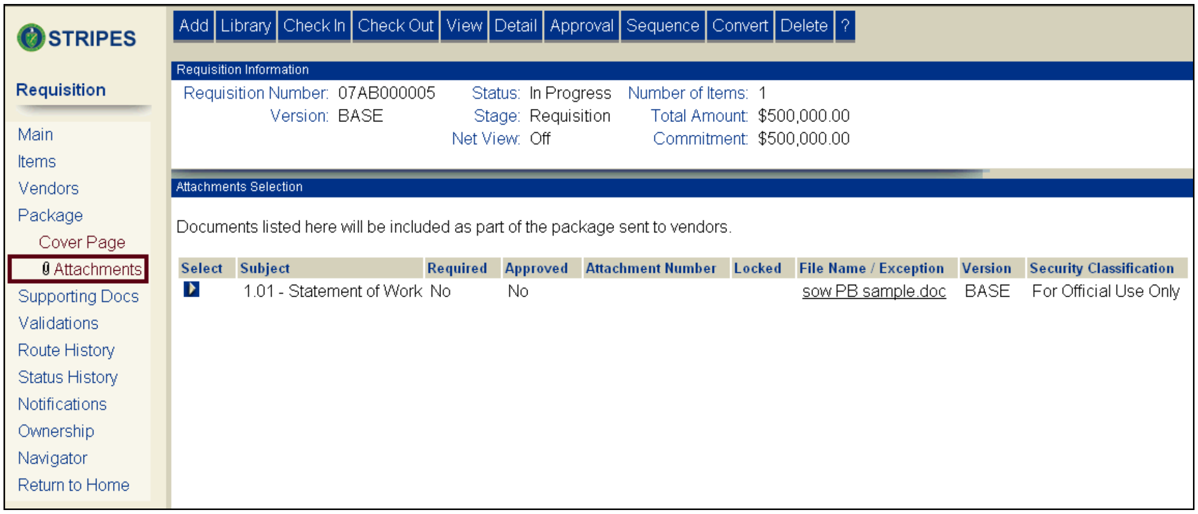

***Cover Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 47. | *Cover Page* | *The Cover Page* page displays with the default Requisition cover page.<br>• Click the **Edit** button to make changes to the standard Requisition cover page. | • The cover page contains a **Consignee and Destination** address (calculated from the fields in the Requisition), and will print a **Ship To** address on each line.<br>• See STRIPES user guide section **Selecting a Cover Page in STRIPES** for more information. |
| 48. | *Cover Page* | • Click the **Setup** button. | . |




***Printing Options Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 49. | *Attachments Selection* | • The *Printing Options* page opens in a new window. | The *Requisition Printing Options* page displays to view the print switches set up for each document type, and to refresh the print switches settings.<br>• The **Refresh** button updates to the latest print switch settings.<br>• Read only fields have been set up by your Site Administrator.<br>• You may modify all read-write fields. |
| 50. | *Requisition Printing Options* | • Click the **Submit** button to return to the *Cover Page*. | |
| 51. | *Cover Page* | • Click the **Attachments** menu option to continue. | |



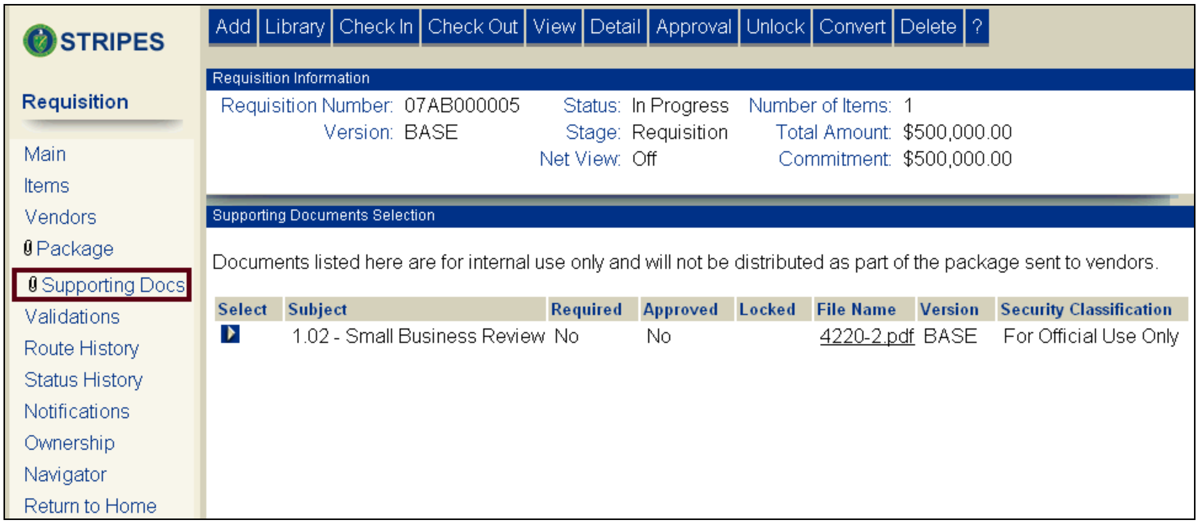

***Attachments Selection Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 52. | *Attachments Selection* | The *Attachments Selection* page displays.<br>• Click the **Add** button to select a document stored locally on your computer to the Requisition Package.<br>AND/OR<br>• Click the **Library** button to add supporting documents maintained in the STRIPES database to the Requisition Package.<br>In each case then<br>• Select the document(s) to be included as attachment(s).<br>• Select the **Security Classification**.<br>• Click the **Submit** button.<br>• Repeat until all the required attachments have been added. | • The **Attachments** folder contains documents that are for the Vendor, and will go out to FedConnect for them to view. They can also be viewed by STRIPES users with the appropriate access rights (see below).<br>• The **Supporting Docs** folder contains documents that can be viewed only by STRIPES users that have been given access (read-only or full access) to the STRIPES documents.<br>***Note*: If the Supporting Document is marked **Confidential**, only STRIPES users with full access will be able to view the Supporting Document. See STRIPES user guide section *Adding Attachments and Supporting Documentation* for more details. |


***Attachments Selection Page – STRIPES Toolbar***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 53. | *Attachments Selection* | To open and display a copy of the selected supporting document or attachment:<br>• Click the **Check Out** button.<br>• Once any changes are made to the checked out version, you will be prompted to **Save As**… Enter the location and / or file name where the document should be saved on your computer. | • When checking out a document, be sure to save it to your computer in a location you can find when it is time to check it back in.<br>• Only one person at a time can check out a document. When a document is checked out, it is put into a locked state.<br>• The file name can be changed, but STRIPES will change it back to the original before checking it back in.. |
| 54. | *Attachments Selection* | To overwrite a previously stored copy of the supporting document in the STRIPES database:<br>• Click the **Check In** button.<br>• Enter the location and file name where the changed document is stored on your computer. | • Users can add comments to display in the document history.<br>• STRIPES does not allow changes to be made directly to the attachments or supporting documents stored in the database. If a change is required, the document must first be checked out. |
| 55. | *Attachments Selection* | To launch the application that created the attachment or supporting document so that it can be viewed or printed:<br>• Click the **View** button. | The document can also be printed at this time. If the associated application is not available on your computer, you will not be able to view it. |
| 56. | *Attachments Selection* | To open the *Document Detail* page where information such as the document description, whether it's required or not, exceptions, etc., can be viewed or edited:<br>• Click the **Detail** button. | |
| 57. | *Attachments Selection* | To open the *Approve Document* page where the selected document can be marked as approved:<br>• Click the **Approval** button. | |

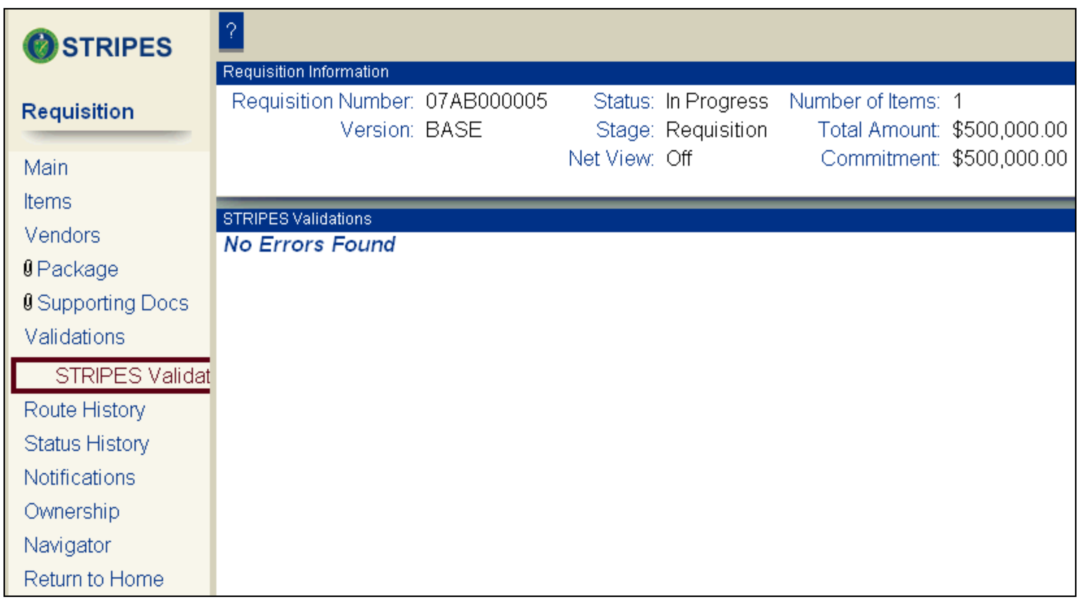
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 58. | *Attachments Selection* | To open the *Document Re-sequence* page where you can edit or review the sequencing of attachments:<br><br>• Click the **Sequence** button. | |
| 59. | *Attachments Selection* | To unlock a document that is checked out and make it available to other users for editing:<br><br>• Click the **Unlock** button (not shown). | |
| 60. | *Attachments Selection* | To move supporting documents to the attachments folder, or attachments to the supporting documents folder:<br><br>• Click the **Convert** button. | |
| 61. | *Attachments Selection* | To delete a selected file and remove all records of it from the database:<br><br>• Click the **Delete** button. | |
| 62. | *Attachments Selection* | • Click the **Supporting Docs** menu option to continue. | |




***Supporting Documents Selection Page***

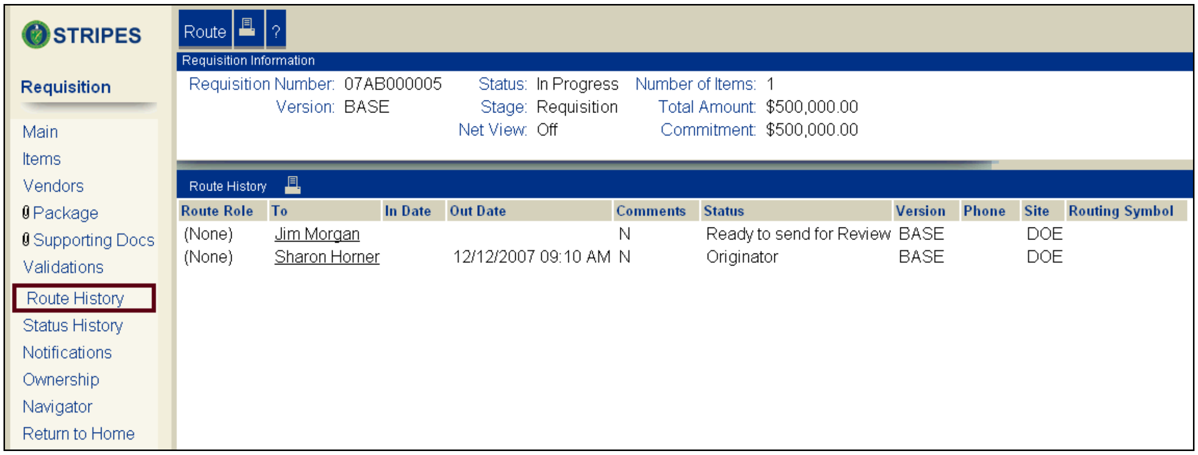
| Steps | Page | User Action | Notes |
|---|---|---|---|
| 63. | *Supporting Documents Selection* | The *Supporting Documents Selection* page displays.<br>• Click the **Add** button to attach a document stored locally on your computer to the Requisition Package.<br>• Click the **Library** button to add supporting documents maintained in the STRIPES database to the Requisition Package.<br>• Select the document(s) to be included as attachment(s).<br>• Select the **Security Classification**.<br>• Click the **Submit** button.<br>• Repeat until all the required attachments have been added. | • The **Supporting Docs** folder contains documents that can be viewed only by STRIPES users that have been given access (read-only or full access) to the STRIPES document.<br>***Note*:** If the Supporting Document is marked **Confidential**, only STRIPES users with full rights will be able to view the Supporting Document<br>• The same STRIPES toolbar buttons are available as described in the previous *Attachments Selection* page. However, Supporting Documents are not sequenced. There is no **Sequence** button on the **Supporting Documents Selection** STRIPES toolbar. |
| 64. | *Supporting Documents Selection* | • Click the **Validations** menu option to continue. | |

| | Page | User Action | Notes |
|---|---|---|---|
| 65. | *Validations* | STRIPES validates the Requisition.<br>The *Validation* page displays with a list of *Error Messages* and/or a list of *Warning Messages*<br>• Click the links under the location column to go to the location of the error or warning.<br>• Click the **Validations** menu option again to re-validate the Requisition. | • An *Error Message* must be corrected to continue.<br>• *Warning Messages* do not have to be corrected to continue.<br>• You can still route this Requisition to your Program Manager with STRIPES fund site errors. |
| 66. | *Validations* | • Once all errors are corrected, the **STRIPES Validations** menu option displays. | |



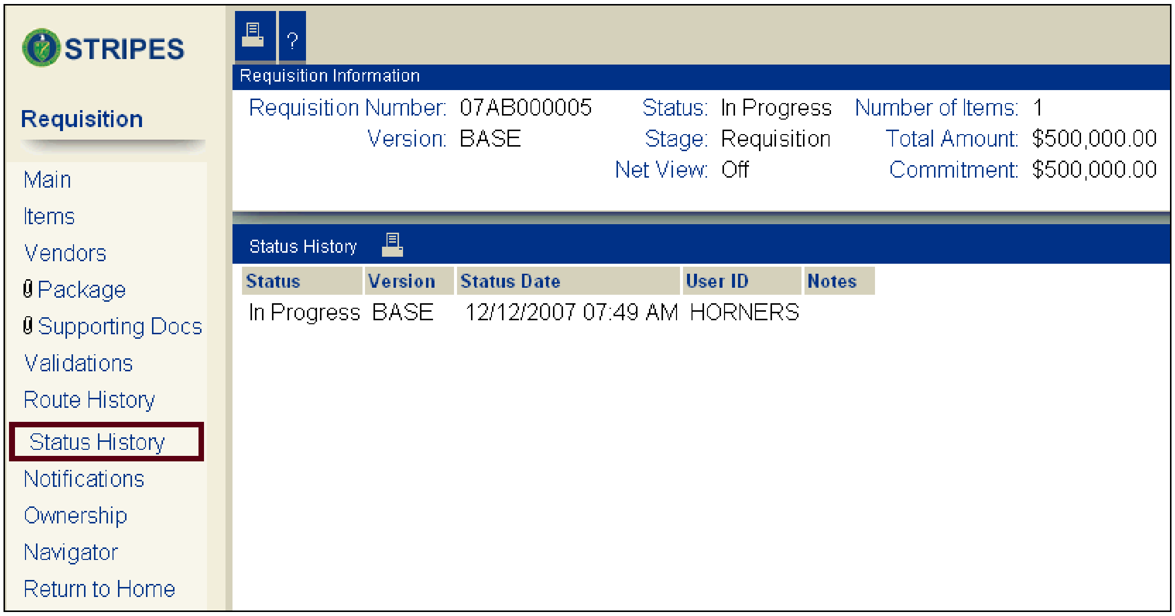

***STRIPES Validations Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 67. | *Validations* | • Click the **STRIPES Validations** menu option. | • This validation is for the STARS financial data and should pass or fail with the same conditions as **Validations**. |
| 68. | *Validations* | • When the STRIPES Validation has completed successfully click the **Route History** menu option to continue. | |




***Route History Page***

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 69. | *Route History* | The *Route History* page displays.<br>• Click the **Route** button to route the Requisition for review or approval.<br>• Requisitions are to be routed to the following Route Roles:<br>  • Budget Approver<br>  • Program Office (Non-Budget)<br>  • Contracting Officer (Optional in the review process.) | • The **Route** button lets you forward documents to other STRIPES users for review and approval.<br>• See STRIPES user guide section, *Routing a Document* for the full explanation of the steps required to Route a document for approval or review. |
| 70. | *Route History* | • Click the **Status History** page to continue. | |

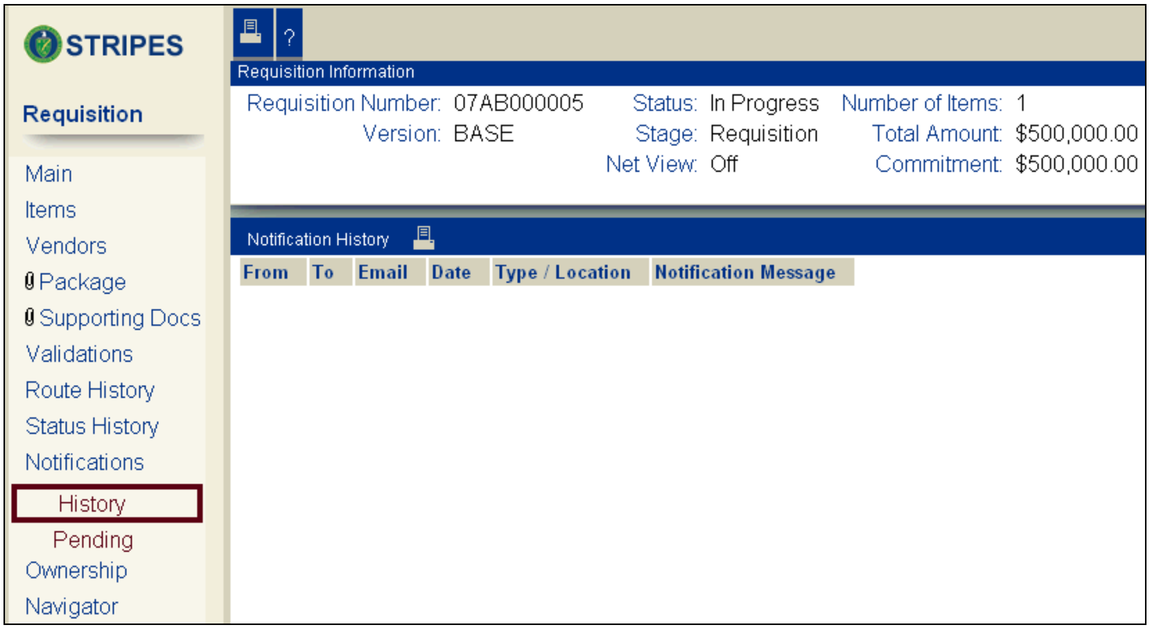



***Status History Page***

## Page Features

The *Status History* page provides a complete history of document status changes. The history is presented in a list format with the most recent event at the top.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 71. | *Status History* | • Click the **Notifications** menu option to display the *Notification History* page. | |

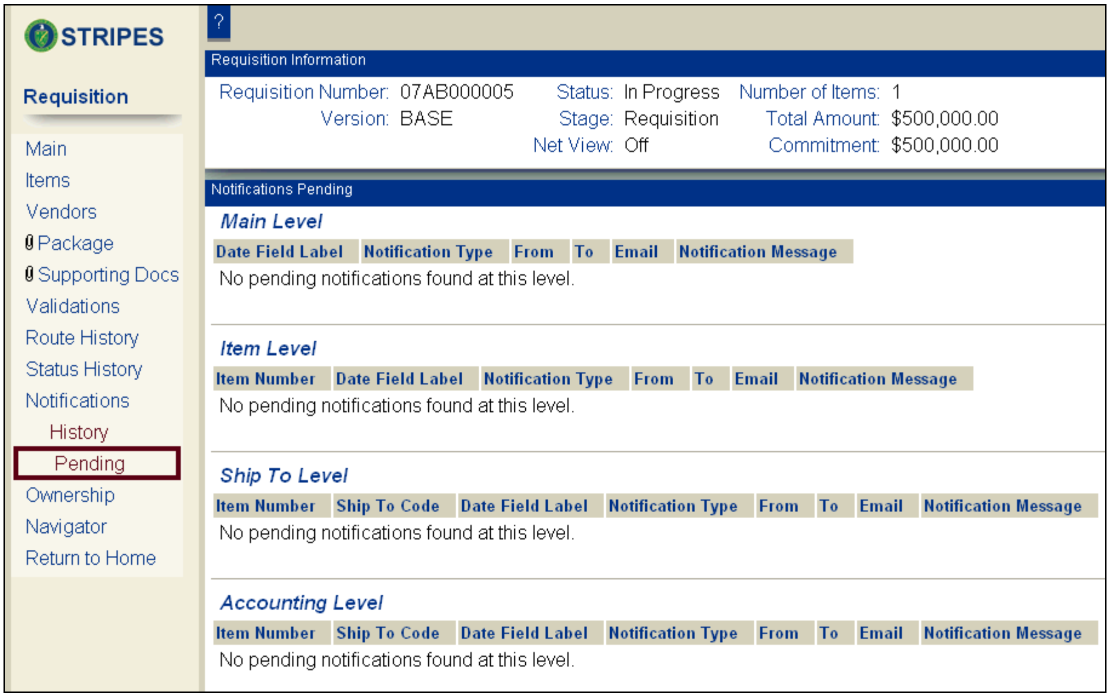



***Notification History Page***

**Page Features**

The *Notification History* page provides a view of the history of each notification set up for your document. STRIPES will automatically send a notification message each time a significant event happens to a document. This page provides a complete history of all notifications sent.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 72. | *Notification History* | • Click the **Notifications Pending** menu option to continue. | |




***Notifications Pending Page***

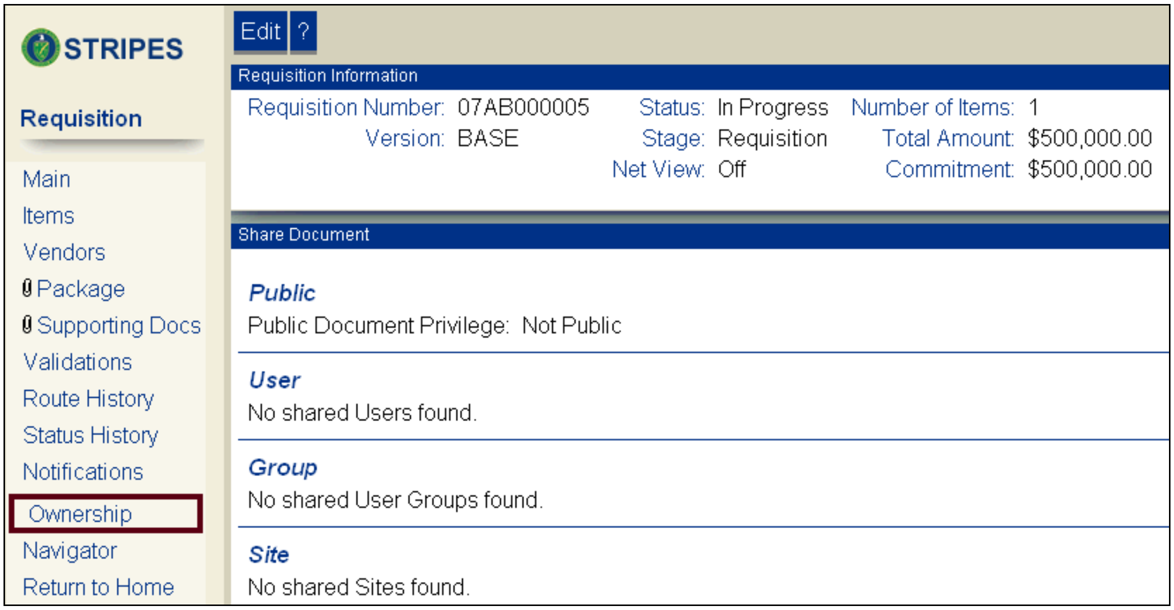
**Page Features**

The *Notifications Pending* page provides a complete listing of all notifications not yet sent. The *Notifications Pending* page is divided into the various levels where Notifications can be set up. The column headings are determined by the location level of the notification. All information on this page is read-only. To change a notification setting, you must return to the section where it was created.

Most levels include the following columns:

- **Date Field Label**: This is the date field where the notification is associated.
- **Notification Type**: Displays the type of notification.
- **From**: This is the person who will send the notification.
- **To**: This is the person who will receive the notification.
- **Email**: Displays the email of the person who will receive the notification.
- **Notification Message**: This is the notification message sent.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 73. | *Notifications Pending* | • Click the **Ownership** menu option to continue. | |




***Share Document Page***

**Page Features**

Use the *Share Document* page to change the access to this document.

Depending on your system setup, the stage and status of your document, and your level of access and/or authority, the page might not display all the features in the list.

**Public**: Displays **Not Public** (system default) if no one else in STRIPES can access this document unless you set them up with document sharing privileges.

**Full Access:** Is displayed if other users are set up with full access document sharing privileges for this document.

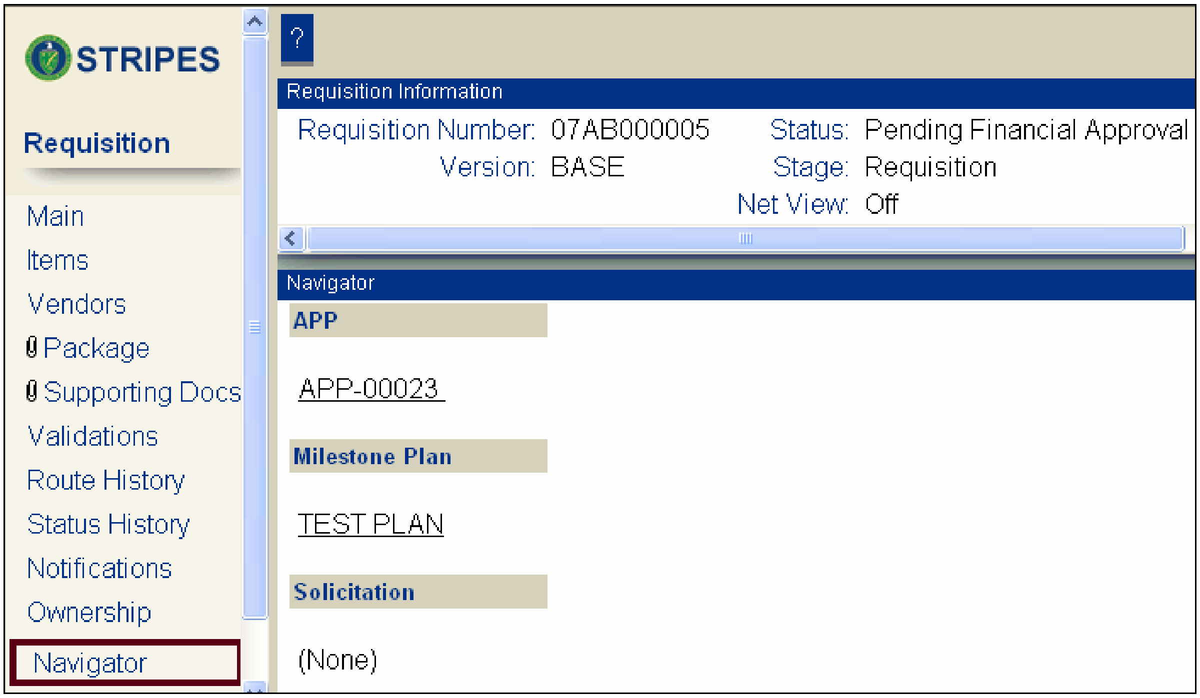
**Read Only:** Is displayed if other users are set up with read-only document sharing privileges for this document.

**User:** Displays a list of user identification codes for users able to view and/or modify the document.

**Group:** Displays a list of user groups able to view and/or modify this document.

**Site:** Displays a list of site codes for the sites able to view and/or modify this document.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 74. | *Share Document* | • Click the **Navigator** menu option to continue. | |




***Navigator Page***

**Page Features**

The **Navigator** displays all documents associated with the Requisition currently open.

Clicking the hyperlink of the associated document in **Navigator** will take you to that document.

| Steps | Page | User Action | Notes |
|---|---|---|---|
| 75. | *Navigator* | Congratulations! You have completed your Requisition document.<br>• Click the **Return to Home** menu option to return to the STRIPES *Welcome* page. | |