

# How to Create a Requisition

# Creating a requisition

- ▶ Navigate to: EOTA Operation /Procurement
- ▶ Before you start be sure you know:
  - Vendor name
  - Work to be performed
  - Deliverables
  - Hours estimated to complete

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- [Cost Tracker](#)
- [Job Numbers](#)
- [Labor Categories](#)
- [Requisitions](#)
- [Vendors](#)
- [Funding](#)

**My Requisition Support Tasks**

<input type="checkbox"/> Task Title	Due Date	<input type="checkbox"/> Created By
<a href="#">Please approve requisition #: 12-023</a>	8/31/2012	<a href="#">Paul Stoudenmire</a>
<a href="#">Please approve requisition #: 12-023</a>	9/7/2012	<a href="#">Paul Stoudenmire</a>
<a href="#">Please approve requisition #: 12-023</a>	9/8/2012	<a href="#">Paul Stoudenmire</a>
<a href="#">Please approve requisition #: 12-25</a>	9/10/2012	<a href="#">Elizabeth Sousa</a>
<a href="#">Please approve requisition #: 12-026</a>	9/14/2012	<a href="#">Elizabeth Sousa</a>
<a href="#">Please approve requisition #: 12-027</a>	9/14/2012	<a href="#">Elizabeth Sousa</a>

**My Document Review/Approval Tasks**

<input type="checkbox"/> Task Title	Due Date
<a href="#">Please approve the document titled: Letter Press (external participant)</a>	
<a href="#">Please approve the document titled: SW Production--DNDO DVDs</a>	
<a href="#">Please approve the document titled: OfficeMax--D bats</a>	8/30/201
<a href="#">Please approve the document titled: OfficeMax--flipcharts</a>	9/4/2012
<a href="#">Please approve the document titled: Ink Technologies--TONERS</a>	

+

**Procurement Library**

<input type="checkbox"/>	Type	PA #	Name	In Support Of	Category	Status	Date Closed
<input type="checkbox"/>			OfficeMax PA 621	FOTA	GPC	Closed/Paid	

# Creating a requisition

- Verify that consultant is on the approved Vendor list



Vendors - Summary -					
Company Name	Full Name	Labor Category	Business Phone	E-Mail	Vendor ID
7 Point, LLC	David Linthicum	ICS LE Specialist	805-869-8708	David.Linthicum@aol.com	7PT
Adobe Systems Inc.	CRS		800-833-6687	unknown	
Amazon.com	CSR		unknown	unknown	HISC
AppleStore.com	CSR		877-412-7753	unknown	SOFTWARE
ASPE-IT	CSR		877-800-5221	info@aspen.com	TRNG
Austin Tele-Services	Mike Rose		512-437-3009	unknown	PC SUPPLY
Bahia Hotel & Resort	Julie Deeb		858-488-0551	unknown	CONF RM
Black Dog Shredding Inc.	Guy Appelman		505-400-7074	Guy@BlackDogShredding.com	SHRED
Camile Padilla	Camile Padilla		505-270-1696	cpad188@gmail.com	Sprrt wk.
CenturyLink (Qwest)	Jerry Newsom		305-245-5588		Phone
Charlie B TrainCar	Charlie Brown	Instructor/SHE-IV	505-363-2630	Charb322@yahoo.com	CBT
CitraOnline.com	Kim Hart		805-690-6400	info@citraonline.com	
Comcast	Sales		805-344-0690		Cable
Commercial Safe & Lock	Jim Endicott		505-899-5625	jim@899lock.com	KEYS
CompuMaster.net	CSR		800-867-4340	customercare@ekilpath.com	SPRR
Corbin Communication	Stephan Margolis	ICS LE Specialist	810-216-2024	smargolis@aol.com	COR
David Pasquale	David Pasquale		875-445-5241	dipasquale@usa.com	
Decisive Engagement Training Systems, LLC	Stacey J Dominguez	Instructor/SHE-III	505-263-4983	Sjdom1@yahoo.com	DET
Dell.com	CSR		800-999-9935		
Dennis Murphy	J. Dennis Murphy		983-316-0130	dennis.murphy@yahoo.com	
DiscountMountainSoftware.com	CSR		866-641-2563	customerservice@discountmountainsoftware.com	SOFTWARE
Doug Larson	Doug Larson	Training Specialist III	505-842-7103	dlarson@ecta.energy.gov	
Edward Baldini	Edward Baldini		215-930-0117	ed260@aol.com	
Elizabeth Waldron	Elizabeth Waldron	Training Analysis Specialist		ewaldron@ecta.energy.gov	
Emergency Mgmt Services International	Chuck Mills/Lisa Fettig		540-423-9004	lisa.fettig@emi-ics-services.com	

# Creating a requisition

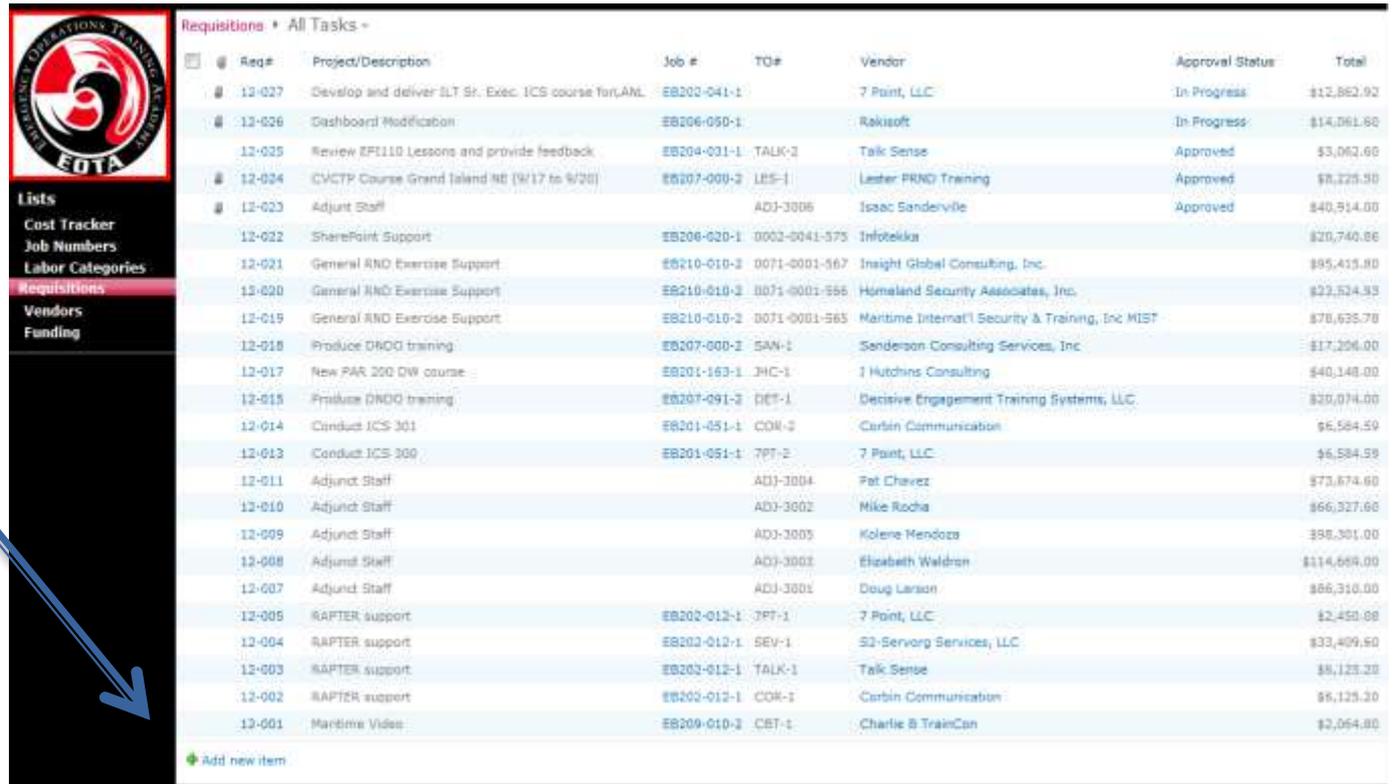
- ▶ Select Requisition from menu



Req#	Project/Description	Job #	TO#	Vendor	Approval Status	Total
12-027	Develop and deliver ILS Sr. Exec. ICS course forLAME	EB202-041-1		7 Point, LLC	In Progress	\$12,862.92
12-026	Dashboard Modification	EB206-050-1		Rakisoft	In Progress	\$14,061.60
12-025	Review EP110 Lessons and provide feedback	EB204-031-1	TALK-2	Talk Sense	Approved	\$3,062.60
12-024	CVCTF Course Grand Island NE (9/17 to 9/20)	EB207-000-2	LES-1	Lester P&ND Training	Approved	\$6,329.50
12-023	Adjunct Staff		ADJ-3006	Isaac Sanderville	Approved	\$40,914.00
12-022	SharePoint Support	EB306-020-1	0002-0041-575	Infotekka		\$20,740.65
12-021	General RND Exercise Support	EB210-010-2	0071-0001-567	Insight Global Consulting, Inc.		\$95,415.00
12-020	General RND Exercise Support	EB210-010-2	0071-0001-500	Homeland Security Associates, Inc.		\$23,824.93
12-019	General RND Exercise Support	EB210-010-2	0071-0001-560	Maritime Internat'l Security & Training, Inc NIST		\$78,635.78
12-018	Produce DMDO training	EB207-000-2	SAW-1	Sanderson Consulting Services, Inc		\$17,306.00
12-017	New PMA 200 DW course	EB201-163-1	JHC-1	J Hutchins Consulting		\$40,148.00
12-015	Produce DMDO training	EB207-091-2	DET-1	Deceive Engagement Training Systems, LLC		\$20,074.00
12-014	Conduct ICS 301	EB201-051-1	COR-2	Corbin Communication		\$6,584.59
12-013	Conduct ICS 300	EB201-051-1	TPT-2	7 Point, LLC		\$6,584.59
12-011	Adjunct Staff		ADJ-3004	Pat Chavez		\$73,674.60
12-010	Adjunct Staff		ADJ-3002	Nika Racha		\$86,327.80
12-009	Adjunct Staff		ADJ-3005	Kolene Mendoza		\$98,301.00
12-008	Adjunct Staff		ADJ-3003	Elizabeth Waldron		\$114,669.00
12-007	Adjunct Staff		ADJ-3001	Doug Larson		\$86,310.00
12-005	RAPTER support	EB202-012-1	TPT-1	7 Point, LLC		\$1,450.08
12-004	RAPTER support	EB202-012-1	SEV-1	S2-Servorg Services, LLC		\$33,409.60
12-003	RAPTER support	EB202-012-1	TALK-1	Talk Sense		\$6,125.20
12-002	RAPTER support	EB202-012-1	COR-1	Corbin Communication		\$6,125.20
12-001	Maritime Video	EB209-010-2	CBT-1	Charlie B TranCon		\$2,064.00

# Creating a requisition

- ▶ Select “Requisition” from menu
- ▶ Select “Add new item”



**EDTA**  
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Lists  
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Job Numbers  
Labor Categories  
**Requisitions**  
Vendors  
Funding

Requisitions • All Tasks -

Req#	Project/Description	Job #	TO#	Vendor	Approval Status	Total
12-027	Develop and deliver SLT Sr. Exec. ICS course for ANL	EB202-041-1		7 Point, LLC	In Progress	\$12,862.92
12-026	Dashboard Modification	EB206-050-1		Rakisoft	In Progress	\$14,061.60
12-025	Review ZPE110 Lessons and provide feedback	EB204-031-1	TALK-1	Talk Sense	Approved	\$3,062.60
12-024	CVCTP Course Grand Island NB (W/17 to 9/20)	EB207-009-2	LES-1	Lester PRND Training	Approved	\$8,125.50
12-023	Adjunct Staff		ADJ-3006	Isaac Sanderville	Approved	\$40,914.00
12-022	SharePoint Support	EB206-020-1	0002-0041-575	Infotekka		\$20,740.86
12-021	General RND Exercise Support	EB210-010-2	0071-0001-567	Insight Global Consulting, Inc.		\$95,415.80
12-020	General RND Exercise Support	EB210-010-2	0071-0001-566	Homeland Security Associates, Inc.		\$23,524.93
12-019	General RND Exercise Support	EB210-010-2	0071-0001-565	Maritime Internat'l Security & Training, Inc MIST		\$70,635.78
12-018	Produce DNOG training	EB207-000-2	SAN-1	Sanderson Consulting Services, Inc		\$17,206.00
12-017	New PAR 200 DW course	EB201-163-1	JHC-1	J Hutchins Consulting		\$40,148.00
12-015	Produce DNOG training	EB207-091-2	DET-1	Decisive Engagement Training Systems, LLC		\$20,074.00
12-014	Conduct ICS 301	EB201-051-1	COR-2	Corbin Communication		\$5,584.59
12-013	Conduct ICS 300	EB201-051-1	7PT-2	7 Point, LLC		\$6,584.59
12-011	Adjunct Staff		ADJ-3004	Pat Chavez		\$73,674.60
12-010	Adjunct Staff		ADJ-3002	Mike Rocha		\$66,327.60
12-009	Adjunct Staff		ADJ-3005	Kolene Mendoza		\$98,301.00
12-008	Adjunct Staff		ADJ-3003	Elizabeth Waldron		\$114,669.00
12-007	Adjunct Staff		ADJ-3001	Doug Larson		\$86,310.00
12-005	RAPTER support	EB202-012-1	7PT-1	7 Point, LLC		\$2,450.88
12-004	RAPTER support	EB202-012-1	SEV-1	S2-Servorg Services, LLC		\$33,409.60
12-003	RAPTER support	EB202-012-1	TALK-1	Talk Sense		\$8,125.28
12-002	RAPTER support	EB202-012-1	COR-1	Corbin Communication		\$5,125.20
12-001	Maritime Video	EB209-010-2	CET-1	Charlie B TrainCan		\$2,064.80

➕ Add new item

# Creating a requisition

- ▶ Create a “Requisition Number”
- ▶ Select a “Job Number”
- ▶ Select the “Consultant”
- ▶ The “Labor Category” will populate automatically
- ▶ Create a short description of the task

Consultant Support Requisition	
<b>Requisition Number</b> Please increment the last requisition number from the list. Format is 12-XXX	12-027
<b>Job Number</b>	EB202-041-1
<b>Consultant</b>	
<b>Labor Category</b>	
<b>Project/Description</b> Short description or project name	Develop and deliver ILT Sr. Exec. ICS course for LANL
<b>Statement of Work</b> Describe in detail the work to be performed	Using FEMA ICS300 and ICS402 course material, in addition to various LANL lessons learned, course material, and input from the LANL Point of Contact, develop a 2 hour instructor-led course
<b>Deliverable 1</b>	Working with the LANL appointed POC, and EOTA consultant, the EOTA will develop an instructor-led course based on the aforementioned objective to include a design document, 74 Hours
<b>Deliverable 2</b>	Upon approval/acceptance from the POC, the course will be delivered based on a date coordinated with the LANL POC. Documentation of participation in the course will be managed 10 Hours

# Creating a requisition

- ▶ Create a statement of the work to be performed
- ▶ Create a description of each deliverable
- ▶ Insert the hours required to complete the deliverable
- NOTE: If you reopen a form to edit, the Consultant and Labor Category may be blank.

Consultant Support Requisition	
<b>Requisition Number</b> Please increment the last requisition number from the list. Format is 12-XXX	12-027
<b>Job Number</b>	EB202-041-1
<b>Consultant</b>	
<b>Labor Category</b>	
<b>Project/Description</b> Short description or project name	Develop and deliver ILT Sr. Exec. ICS course for LANL
<b>Statement of Work</b> Describe in detail the work to be performed	Using FEMA ICS300 and ICS402 course material, in addition to various LANL lessons learned, course material, and input from the LANL Point of Contact, develop a 2 hour instructor-led course
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<b>Deliverable 2</b>	Upon approval/acceptance from the POC, the course will be delivered based on a date coordinated with the LANL POC. Documentation of participation in the course will be managed 10 Hours

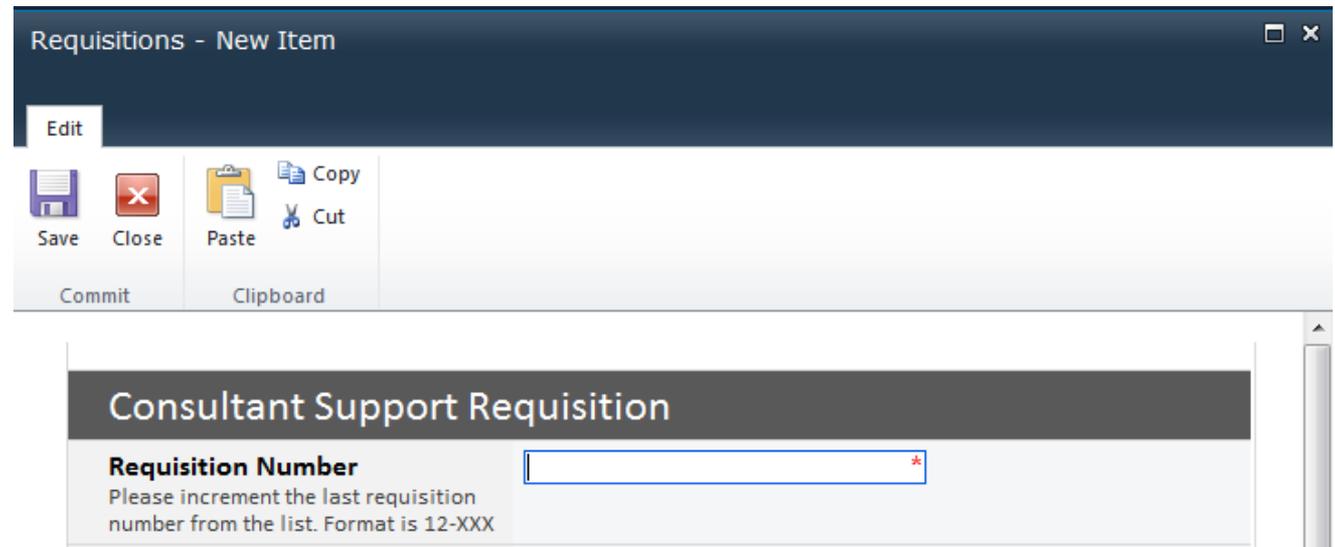
# Creating a requisition

- ▶ The “Total Cost of Labor” will be generated for you
- ▶ Select the date the consultant will start work and end work
- ▶ Attach any supporting documents
- ▶ The Task Order Number will be added by the PMO

<b>Deliverable 3</b>	Hours
<b>Deliverable 4</b>	Hours
<b>Total cost of Labor</b>	\$12,862.92
<b>Travel Estimate (NTE)</b>	
<b>Period of Performance Start</b>	9/11/2012
<b>Period of Performance End</b>	1/1/2013
<b>Attachments</b>	<a href="#">ISDF-001 Technical Direction 12_0409 (BOTH).docx</a> <a href="#">ISDF-044 Course Feasibility Assessment 10_0630 (BOTH) .doc</a>
<b>Task Order Number</b>	Assigned by PMO after requisition is approved

# Creating a requisition

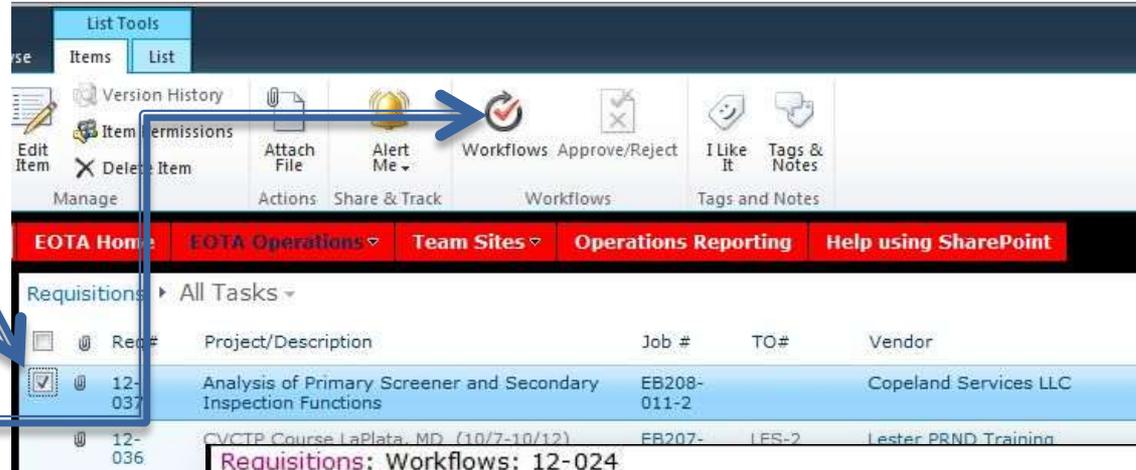
- ▶ Select “Save”
- ▶ The requisition will automatically be routed to the PM for approval



The screenshot shows a web application window titled "Requisitions - New Item". The window has a dark blue header bar with the title and window control icons. Below the header is a light gray toolbar with an "Edit" button and several icons: a floppy disk for "Save", a red square with a white 'X' for "Close", a clipboard for "Paste", a document with a plus sign for "Copy", and a pair of scissors for "Cut". Below the toolbar are two buttons: "Commit" and "Clipboard". The main content area has a dark gray header bar with the text "Consultant Support Requisition". Below this is a form field labeled "Requisition Number" with a red asterisk. The text below the field reads: "Please increment the last requisition number from the list. Format is 12-XXX".

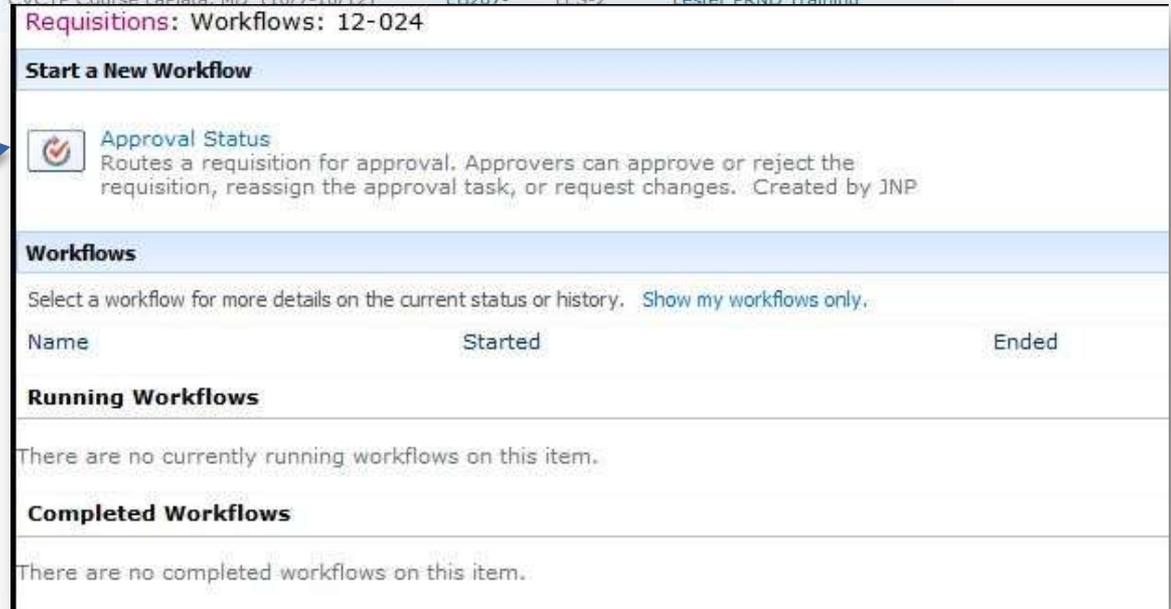
# Submitting for approval

- ▶ Check the requisition you want to submit
- ▶ Select “Workflow” from the ribbon menu
- ▶ Select the workflow you wish to start. In this case, “Approval Status”



The screenshot shows the SharePoint ribbon with the 'List' tab selected. The 'Workflows' group is highlighted, and the 'Approval Status' icon is selected. Below the ribbon is a table of requisitions.

Req #	Project/Description	Job #	TO#	Vendor
12-037	Analysis of Primary Screener and Secondary Inspection Functions	EB208-011-2		Copeland Services LLC
12-036	CVCTP Course LaPlata, MD (10/7-10/12)	FB207-	LFS-2	Lester PRND Training



The screenshot shows a dialog box titled "Requisitions: Workflows: 12-024". It contains a section for "Start a New Workflow" with a list of available workflows. The "Approval Status" workflow is selected.

**Start a New Workflow**

- Approval Status**  
Routes a requisition for approval. Approvers can approve or reject the requisition, reassign the approval task, or request changes. Created by JNP

**Workflows**

Select a workflow for more details on the current status or history. [Show my workflows only.](#)

Name	Started	Ended
------	---------	-------

**Running Workflows**

There are no currently running workflows on this item.

**Completed Workflows**

There are no completed workflows on this item.

# Submitting for approval

- ▶ Verify that the routing is correct
- ▶ Insert a due date for approval
- ▶ Start

Approvers	<table border="1"><thead><tr><th>Assign To</th><th>Order</th></tr></thead><tbody><tr><td><a href="mailto:motero@eota.energy.gov">motero@eota.energy.gov</a> ;</td><td>One at a time (serial)</td></tr><tr><td><a href="mailto:dmckav@eota.energy.gov">dmckav@eota.energy.gov</a> ;</td><td>One at a time (serial)</td></tr></tbody></table>	Assign To	Order	<a href="mailto:motero@eota.energy.gov">motero@eota.energy.gov</a> ;	One at a time (serial)	<a href="mailto:dmckav@eota.energy.gov">dmckav@eota.energy.gov</a> ;	One at a time (serial)
Assign To	Order						
<a href="mailto:motero@eota.energy.gov">motero@eota.energy.gov</a> ;	One at a time (serial)						
<a href="mailto:dmckav@eota.energy.gov">dmckav@eota.energy.gov</a> ;	One at a time (serial)						
	<input type="checkbox"/> Add a new stage Enter the names of the people to whom the workflow will assign tasks, and choose the order in which those tasks are assigned. Separate them with semicolons. You can also add stages to assign tasks to more people in different orders.						
Expand Groups	<input checked="" type="checkbox"/> For each group entered, assign a task to every member of that group.						
Request	<div style="border: 1px solid #ccc; height: 40px;"></div> <p>This message will be sent to the people assigned tasks.</p>						
Due Date for All Tasks	<input type="text"/> The date by which all tasks are due.						
Duration Per Task	<input type="text" value="2"/> The amount of time until a task is due. Choose the units by using the Duration Units.						
Duration Units	<input type="text" value="Day(s)"/> Define the units of time used by the Duration Per Task.						
CC	<a href="mailto:pjenkins@eota.energy.gov">pjenkins@eota.energy.gov</a> ; <a href="mailto:dmckav@eota.energy.gov">dmckav@eota.energy.gov</a> ; <a href="mailto:motero@eota.energy.gov">motero@eota.energy.gov</a> ; Notify these people when the workflow starts and ends without assigning tasks to them.						
<input type="button" value="Start"/> <input type="button" value="Cancel"/>							

# Re-submitting for approval

- ▶ If a requisition is rejected it can be modified and re-submitted for approval
- ▶ After editing the requisition, launch the Workflow. You will see there is no option to “Start a New Workflow”. You must terminate the current workflow first
- ▶ Select the running workflow in this case “Approval Status”
- ▶ Select “Terminate this workflow now”
- ▶ You can now start a new workflow

The screenshot displays a workflow management interface. At the top, it shows 'Requisitions: Workflows: 12-034'. Below this, there are sections for 'Start a New Workflow', 'Workflows', 'Running Workflows', and 'Completed Workflows'. The 'Running Workflows' section contains a table with one entry: 'Approval Status' with a status of 'Rejected'. A detailed view of the 'Approval Status' workflow is shown in a separate window, including 'Workflow Information' such as Initiator (Lawrence Hatfield), Item (12-034), Started (10/2/2012 2:07 PM), and Last run (10/2/2012 2:49 PM). A 'Tasks' section at the bottom of the detailed view includes a link to 'Terminate this workflow now'.

Requisitions: Workflows: 12-034

**Start a New Workflow**

There are no workflows currently available to start on this item.

**Workflows**

Select a workflow for more details on the current status or history. [Show my workflows only.](#)

Name	Started	Ended	Status
Approval Status	10/2/2012 2:07 PM		Rejected

**Running Workflows**

**Completed Workflows**

There are no completed workflows on this item.

**Workflow Status: Approval Status**

**Workflow Information**

**Initiator:** Lawrence Hatfield      **Item:** 12-034  
**Started:** 10/2/2012 2:07 PM      **Status:** Rejected  
**Last run:** 10/2/2012 2:49 PM

If an error occurs or this workflow stops responding, it can be terminated. [Terminate this workflow now.](#)

**Tasks**

# Tracking a requisition

- ▶ Check the “Approval Status”
- ▶ Select “status” to view history

Req#	Project/Description	Job #	TO#	Vendor	Approval Status	Total
12-027	Develop and deliver IIT Sr. Exec. ICS course for UANL	EB202-041-1		7 Point, LLC	In Progress	\$12,862.92
12-026	Dashboard Modification	EB206-050-1		Rakisoft	In Progress	\$14,061.60
12-025	Review EP5110 Lessons and provide feedback	EB204-031-1	TALK-2	Talk Sense	Approved	\$3,062.60
12-024	CyCTF Course Grand Island NE (9/17 to 9/30)	EB207-000-2	LES-1	Leater RND Training	Approved	\$8,225.50
12-023	Adjunt Staff					14.00
12-022	SharePoint Support					140.86
12-021	General RND Exercise Support					15.80
12-020	General RND Exercise Support					14.93

Approval Status	Total
In Progress	\$12,862.92
In Progress	\$14,061.60
Approved	\$3,062.60
Approved	\$8,225.50
Approved	\$40,914.00
	\$20,740.86
	\$95,415.80
	\$23,524.93

# Tracking a requisition

Workflow Status: Approval Status

## Workflow Information

**Initiator:** Elizabeth Sousa                      **Item:** 12-026  
**Started:** 9/11/2012 1:53 PM                      **Status:** In Progress  
**Last run:** 9/14/2012 3:16 PM

- [Add or update approvers of Requisition Approval](#)
- [Cancel all Requisition Approval tasks](#)
- [Update active tasks of Requisition Approval](#)

If an error occurs or this workflow stops responding, it can be terminated. Terminating the workflow will set its status to Canceled and will delete all tasks created by the workflow.

- [Terminate this workflow now.](#)

## Tasks

The following tasks have been assigned to the participants in this workflow. Click a task to edit it. You can also view these tasks in the list [Requisition Support Tasks](#).

<input type="checkbox"/> <input type="checkbox"/> Assigned To	Task Title	Due Date	Status	Related Content	Outcome
Paul Stoudenmire	Please approve requisition #: 12-026	9/14/2012	Completed	12-026	Approved
David McKay	Please approve requisition #: 12-026	9/14/2012	Not Started	12-026	

## Workflow History

- [View workflow reports](#)

The following events have occurred in this workflow.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description	Outcome
9/11/2012 1:53 PM	Workflow Initiated	<a href="#">Elizabeth Sousa</a>	Requisition Approval was started. Participants: Paul Stoudenmire;David McKay	
9/11/2012 1:53 PM	Task Created	<a href="#">Elizabeth Sousa</a>	Task created for Paul Stoudenmire. Due by: None	
9/11/2012 3:15 PM	Task Completed	<a href="#">Paul Stoudenmire</a>	Task assigned to Paul Stoudenmire was approved by Paul Stoudenmire. Comments:	Approved by Paul Stoudenmire
9/11/2012 3:15 PM	Task Created	<a href="#">Elizabeth Sousa</a>	Task created for David McKay. Due by: None	