

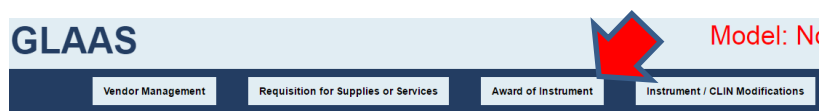
Requisition for Supplies and Services 19 Sept 2016

The requisition process is complex. Having said this, we are going to create a very simple version of it.

A requisition is actually two different things; it is a process and it is also a container/folder of information.

The Requisition Process. USAID creates a requisition every time it purchases something. (A requisition is a request to purchase goods or services.) Here is the simplest way to describe the process:

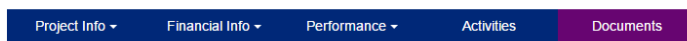
1. First, USAID decides to purchase a good or service
2. Then USAID decides on the type of procurement (a contract, a grant, or other)
3. Then USAID checks to see how much money it has for this requisition **and commits it.**
This is a commitment. The money might be committed to the requisition, or it might be committed to the CLINs in the requisition.
4. Then USAID creates a folder or container to store all of the documents.
5. Then USAID prepares a RFP, RFQ or other document that will be sent out.
6. Then USAID receives all of the proposals and evaluates which one is best.
7. The final step is an Award. Awards are managed in the **Award of Instrument** module.



A Requisition Container/Folder. As USAID goes through its processes, documents are created, approved and then placed into a requisition folder. The folder is given a unique Requisition ID formatted like this XXX-999-99-999999. The first three digits are letters (SOL for Solicitation), the next three digits are a number for the OU (386 for India), the next two digits are the Fiscal Year (16 for 2016), and the last six digits are the unique Requisition number (000003). The container/folder is accessible to users through the **Documents** tab.

Project:000013

Cloud Based Learning Platform



For example, there are 20 different items in the folder that I created for USAID's contract with RGInfotech – see below. These are all kept in a folder called SOL-386-16-000003.

Requisition for Supplies and Services 19 Sept 2016

[SOL-386-16-000003 Past Performance Reference Check List DVD4Vets](#)
[India Award SOL-386-16-000003 v 07 12 2016](#)
[SOL-386-16-000003 Past Performance - MHRD](#)
[SOL-386-16-000003 DRAFT Source Selection Decision Document](#)
[SOL-386-16-000003 Cost Realism Checklist](#)
[Individual Evaluation Sheet Stephen Jarrett 07 06 2016](#)
[Individual Evaluation Sheets Linda Hill 07 06 2016](#)
[Individual Evaluation Sheets Fouad Ellaithy 07-06-16](#)
[SOL-386-16-000003 Procurement Notes in Chron Order](#)
[SOL-386-16-000003 Memorandum of Negotiations Short Form](#)
[SOL-386-16-000003 Determination and Findings for Time and Material Contract](#)
[SOL-386-16-000003 Source Selection Decision Document](#)
[SOL-386-16-000003 Conflict of Interest and Non Disclosure Signed 07 05 2016](#)
[SOL-386-16-000003 TEC Memo Signed 07 07 2016](#)
[SOL-386-16-000003 Past Performance Reference Check List MHRD](#)
[SOL-386-16-000003 Past Performance Reference Check List Drewery](#)
[SOL-386-16-000003 RGINfotech Proposal 07 05 2016](#)
[SOL-386-16-000003 Attachment 2 - Initial Market Research for Program Cycle Modeling](#)
[SOL-386-16-000003 Attachment 1 - Lab Proposal Rapid Proofs of Concept in Support of the Program Cycle 04 12...](#)

A requisition record has a parent (a requisition) and one or more children (CLINs). Each CLIN record might have its own children (Sub-CLINs).

Below are the data elements for the parent record.

Requisition ID	The requisition number. Other common words for requisition are: order, request, call, application, claim, demand	XXX-XXX-99-999999
Requisition Created Date	The date that the requisition record was created.	Date - MM/DD/YYYY
Requisition Type	Choose the type based on values to the right	Acquisition, Assistance
Requisition Status	The status of a requisition as it relates to USAID's procedures for processing requisitions.	Incomplete, Pre-Approved, Rejected, Returned, In-Process, Approved, Canceled, Requires Re-approval
Requisition Period of Performance Start Date	The start date of performance (service) or delivery date (supplies)	Date - MM/DD/YYYY
Requisition Period of Performance End Date	The end date of performance (service) or delivery date (supplies)	Date - MM/DD/YYYY

Here are the data elements for a child CLIN record.

CLIN Number	The unique CLIN number associated with the work that is being done in support of the unique Project ID and Activity ID, below.	This is associated with the Requisition ID by using a 3-digit extension number
CLIN Name	Short name for the CLIN	Text 128 characters
CLIN Description	Description of the CLIN and its purpose	Text

Requisition for Supplies and Services 19 Sept 2016

CLIN Amount	Dollar amount of the CLIN	Numeric (accounting \$)
CLIN Start Performance Period	The date that the CLIN is scheduled to start. Defaults to Award Start Performance Period if not entered.	Date - MM/DD/YYYY
CLIN End Performance Period	The date that the CLIN is scheduled to end. Defaults to Award End Performance Period if not entered.	Date - MM/DD/YYYY
CLIN do not share	If checked, the CLIN data is not published	Check box

Here are the data elements for a child Sub-CLIN record.

Sub-CLIN Number	The unique Sub-CLIN number associated with the work that is being done in support of the unique Project ID and Activity ID, below.	Numeric
Sub-CLIN Description	Description of the type of cost. Examples are personnel costs, travel costs	Text
Sub-CLIN Amount	Dollar amount of the Sub-CLIN	Numeric (accounting \$)

Please think about how you can build tables so that they will work with the requirement that I wrote about on 11 Aug. I have copied it below.

Requisition for Supplies and Services 19 Sept 2016

11 Aug 2016

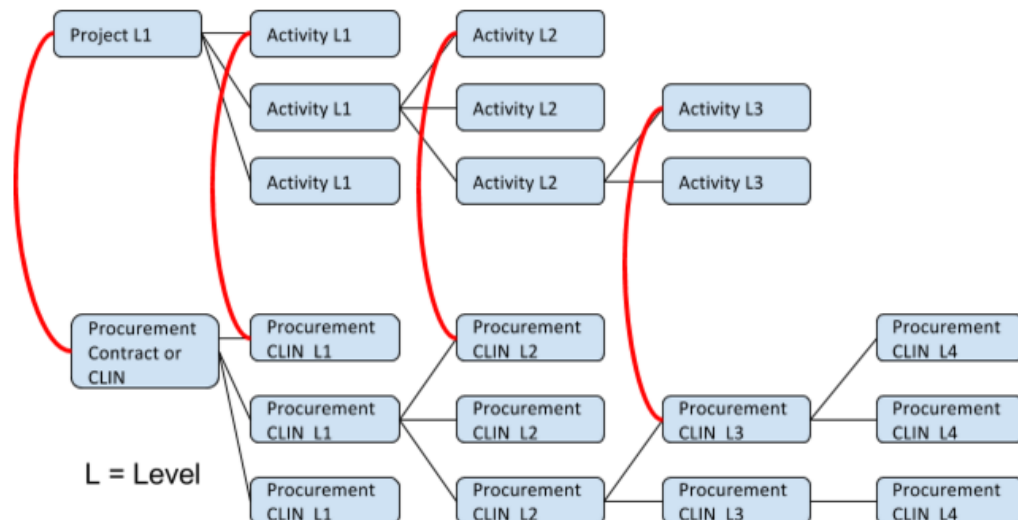
[Stephen wrote]

The designs and the services are starting to take shape. Very nice work everyone!

I added links to rows 30 and 31 in the [\[Project/Activity\]](#) tab.

I had a discussion today that could affect the way you build the [Project/Activity], [Procurement] and maybe [Accounting] data table structures. The current data dictionary tabs describe a one-to-many relationship this way: **one project to many activities** or **one CLIN to many sub-CLINs**.

Some people today said that this might change. Basically, the new structures might look like this:



As you build your MySQL tables, please think about how you can add more nested tables (like in the diagram above.) The first model you are building (the AMP model) will only use the first two levels (the Project L1 and Activity L1 levels.) In the future, one or more models will have up to three levels for Activities and up to five levels for CLINs.