

HBC ONLINE ORDERING SYSTEM INSTRUCTIONS FOR NON PIs

5.09

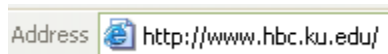
Please access the Online Ordering System (OOS) with the following browsers

Windows: Internet Explorer and Mozilla Firefox

Macs: Mozilla Firefox

1. To place an order:

- a. Go to www.hbc.ku.edu.



- b. Click on "Grant Services."



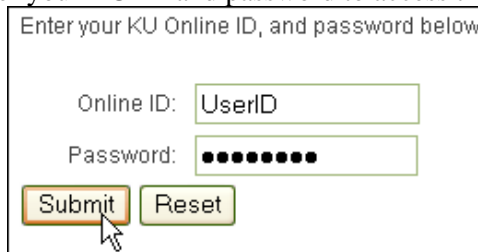
- c. Click on "Online Ordering for HBC Administered Grants."



- d. Click on "Initiate Order for E-mail Routing and On-Line Approval."



- e. Enter your KU ID and password to access the system.

A screenshot of a login form. At the top, it says "Enter your KU Online ID, and password below." Below this are two input fields: "Online ID:" with the text "UserID" and "Password:" with ten black dots. At the bottom are two buttons: "Submit" and "Reset". A mouse cursor is pointing at the "Submit" button.

- f. Click on "Initiate Order for E-mail Routing and On-line Approval"



g. Fill the order form

ORDER REQUEST
 HIGUCHI BIOSCIENCES CENTER
 PHONE NUMBER 864-5140
 FAX NUMBER 864-3578

Vendor:

Other Vendor:

Phone:

Fax:

Radioactive Material: No Yes

State Contract: No Yes

NOTE: Rows without a 'Description' will not be saved.

| Number Needed | Unit (e.g. box) | Description | Catalogue Number | Unit Price | Account to Charge |
|--------------------------------|---------------------------------|--|---|-------------------------------------|------------------------------------|
| <input type="text" value="1"/> | <input type="text" value="cs"/> | <input type="text" value="25 mL pipet"/> | <input type="text" value="13-678-11"/> | <input type="text" value="107.02"/> | <input type="text" value="26022"/> |
| <input type="text" value="2"/> | <input type="text" value="cs"/> | <input type="text" value="10 mL pipet"/> | <input type="text" value="13-678-11E"/> | <input type="text" value="49.11"/> | <input type="text" value="26022"/> |
| <input type="text" value="2"/> | <input type="text" value="pk"/> | <input type="text" value="2 mL microcentrifuge tube"/> | <input type="text" value="02-681-321"/> | <input type="text" value="17.18"/> | <input type="text" value="44230"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Shipping: Next Day Second Day Ground

Deliver To:

Department:

Building:

Room:

Phone:

E-Mail:

Remarks:

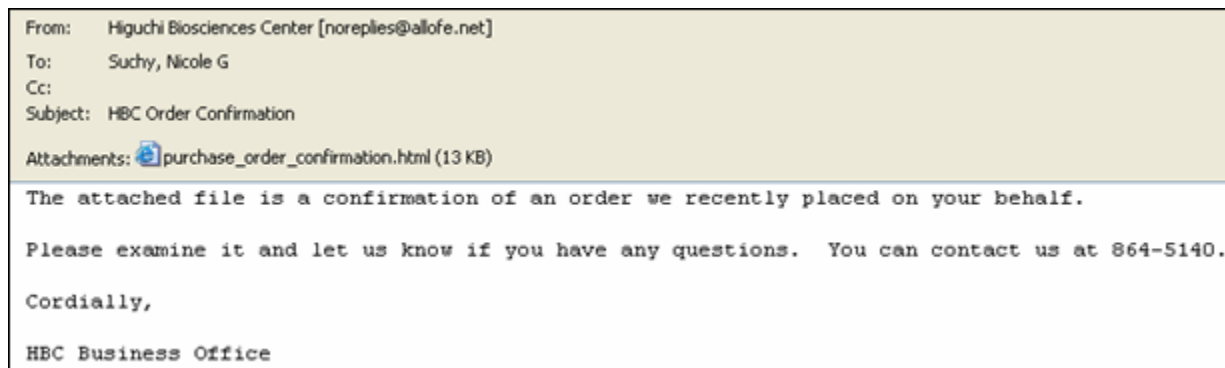
Research Director:

- i. Carefully select the vendor from the drop-down list. If the name is not in the list, enter the information into the “Other Vendor” field. We will add the vendor’s name to the database and it will be there for subsequent orders.
- ii. Indicate if the material is radioactive or not.
- iii. Enter the quantity, unit size (each, box, pack, etc.), description, catalog number, and unit price.
- iv. Enter the five-digit grant number (omitting the leading letters) for each line item.
- v. Select the shipping method.
- vi. Fill out the delivery information. The “Deliver To” should read your name. The e-mail address entered is where the order confirmation will be sent. Multiple addresses can be entered if separated by a comma.
- vii. You may enter quote numbers or any additional information in the “Remarks” field.
- viii. Select your research director’s name from the drop-down menu. This person will then be notified that there is an order awaiting their approval.
- ix. Click the “Submit” button when everything is completed.

h. If the order was submitted, the next screen will say “The purchase order was successfully created.”

The purchase order was successfully created

- i. The order now goes to your PI for approval and will then be automatically received by HBC.
- j. After HBC has placed your order, you will receive an e-mail with an attached confirmation.



- k. Open the confirmation.

| Grant Num | Sub Acct | Catalogue Num | Description | Unit | Qty | Unit Cost | Ext. Price | Add. Cost | Add. Cost Code* | Total Cost | Memo | Delay Code** | Est. Delivery |
|-----------|----------|---------------|------------------------------|------|-----|-----------|------------|-----------|-----------------|------------|------|--------------|---------------|
| 26026 | | 25995-0 | Benzoyl chloride | 5 ml | 1 | \$ 21.80 | \$ 21.80 | \$ 2.00 | S | \$ 23.80 | | B | 10/30/06 (1) |
| 26026 | | 11190-2 | 4-chlorobenzoyl chloride | 5 g | 1 | \$ 14.25 | \$ 14.25 | \$ 0.00 | | \$ 14.25 | | | |
| 26023 | MM | 11194-5 | 3,4-Dichlorobenzoyl chloride | 25 g | 1 | \$ 30.30 | \$ 30.30 | \$ 0.00 | | \$ 30.30 | | | |

Order Confirmation
 Higuchi Biosciences Center

HBC PO#: HB07-6146
Vendor: Sigma Aldrich Marketing, Inc.
Spoke With: Daniel
Reference Number: 62553344
Payment:

Date Initiated: 9/14/2006
Date Ordered: 9/14/2006
Est. Delivery: 9/17/06
Requested Shipping: Ground

Deliver To: Nicole Suchy
Bldg / Room: McCollum / 129
Department: HBC
Phone: 864-3572
E-Mail: nsuchy@ku.edu

Remarks:

Sub Total: \$ 88.35 **Approved By:** ADirector Test
(H) Order Add'l: \$ 5.00
Est. Shipping: \$ 15.00
Grand Total: \$ 88.35

*Additional Cost Codes: S=Shipping; H=Handling; D=Dry Ice; HZ=Hazardous Materials; P=Packaging Fee; D= Documentation; HP=Hazardous Mat. Packaging Fee
 **Delay Codes: W=Other Warehouse; B=Back Order; WB=Other Warehouse and Back Order

- i. The delivery information can be found near the top center of the order.
- ii. If any items are shipping separately or are backordered for some reason, their separate delivery information can be found at the far right of the individual line item row.
- iii. Please note the key at the bottom of the confirmation.

2. To place a DNA Sequencing, Oligos, Primers order:

To orders for DNA Sequencing, Oligos, Primers, etc. (anything that you would generally get a PO number from HBC and then order yourself)

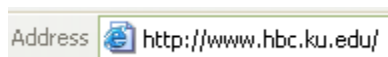
- a. Create an online order as usual, filling in whatever information you have (not necessary to include detailed sequences, etc). In the “Remarks” section note that you will be ordering these items yourself.
- b. Once your PI has approved the order and HBC has reviewed it, you will receive the normal e-mail confirmation. This includes your PO number and the billing address and will allow you to then place the order with the vendor.

3. Using HBC's Credit Cards (Office Depot, Dillons, Home Depot, etc.)

- a. Create an online order including whatever information you may have. You don't need to include prices if you don't have that information. In the "Remarks" section note that you will come pick up the card when it is available.
- b. Once your PI has approved your request and HBC has reviewed it, we will let you know when the credit card is available for pick up.
- c. Return the card and receipt to HBC as usual.

4. To see details of all orders or to re-submit a previous order with or without modifications:

- a. Go to www.hbc.ku.edu.



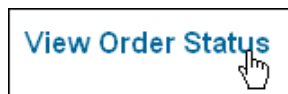
- b. Click on "Grant Services."



- c. Click on "Online Ordering for HBC Administered Grants."



- d. Click "View Order Status."



- e. Enter your lab group Username and Password.

- i. If you don't know this information, contact your PI or the head of your lab.
- ii. If your lab does not have a username set up, contact the transaction group at 4-5140.

- f. Select "Orders List" and click "Make Report."

| Report Name | Report Description |
|--|--|
| Orders List | Returns all orders, filterable by create date, destination name, and research director |
| | |
| <input type="button" value="Make Report"/> | |

- g. Select how you would like to filter the order. You may do any combination of all five of these. Click "Filter" when you are finished.

Filter


| | |
|---|---|
| Created After: <input type="text" value="5/1/07"/> | Created Before: <input type="text" value="8/31/07"/> |
| Research Director: <input type="text" value="testDir, Nicole"/> | Destination Name: <input type="text" value="TEST ORDER"/> |
| Grant #: <input type="text"/> | Vendor: <input type="text" value="AB Coker"/> |
| Fiscal Year: <input type="text" value="2007"/> | <input type="button" value="Filter"/> |










Please provide a filter to display the results.


Reserved


- i. "Created After"/"Created Before"-fill in *both* fields if you'd like to search by order submission date
- ii. "Research Director"-select your research director to see his/her orders only
- iii. "Destination Name"-filter by the name that was entered in the "Deliver To" field of the order form
- iv. "Grant #" – filter by grant # to see all orders containing that number.
- v. "Vendor" – filter by vendors to see all orders placed with this vendor.
- vi. "Fiscal Year" – filter by fiscal year. The field contains the current fiscal year as default. You need to change it if your order was placed during a

different fiscal year. (Note: An order with a PO # HB07-xxxx was placed during the 2007 fiscal year, an order with a PO # HB08-xxxx was placed during the 2008 fiscal year, etc).

- h. All the relevant orders will be returned. To see the order details, click on this icon  located to the far left of each row. The most up-to-date information in the system will be displayed.

| | HBC PO # | Create Date | Research Director | Name | Received By HBC | Order Placed | Expected Delivery | Vendor | Status |
|---|-----------|-------------|-------------------|------------|-----------------|--------------|-------------------|----------|-----------------|
|  | HB07-8070 | 06/05/2007 | testDir, Nicole | TEST ORDER | 06/05/2007 | 06/05/2007 | | AB Coker | Order Cancelled |
|  | HB07-8072 | 06/05/2007 | testDir, Nicole | TEST ORDER | 06/05/2007 | | | AB Coker | Order Cancelled |
|  | HB07-8098 | 06/06/2007 | testDir, Nicole | TEST ORDER | 06/06/2007 | 06/12/2007 | | AB Coker | Order Cancelled |
|  | HB07-8103 | 06/06/2007 | testDir, Nicole | TEST ORDER | 06/06/2007 | 06/12/2007 | | AB Coker | Order Cancelled |
|  | HB07-8115 | 06/07/2007 | testDir, Nicole | TEST ORDER | | | | AB Coker | Order Cancelled |
|  | HB07-8116 | 06/07/2007 | testDir, Nicole | TEST ORDER | 06/07/2007 | 06/12/2007 | 6/20/07 | AB Coker | Order Cancelled |
|  | HB07-8187 | 06/12/2007 | testDir, Nicole | TEST ORDER | 06/12/2007 | 06/12/2007 | | AB Coker | Order Cancelled |
|  | HB07-8276 | 06/18/2007 | testDir, Nicole | TEST ORDER | 06/18/2007 | 06/19/2007 | | AB Coker | Order Cancelled |
|  | HB07-8281 | 06/18/2007 | testDir, Nicole | TEST ORDER | | | | AB Coker | Order Cancelled |

- i. The other icon  is to resubmit that specific order (with possible modifications) without having to re-type it. If you click on it, the order form will open, filled with the data as entered in the original order. You can make any modifications you wish in the order. When done, click "Save Changes" and the order will be resubmitted for the research director's approval, and given a new PO number (If you want to exit this screen without re-submitting the order, click on the "Reports" tab on the upper left side of the screen).

Reports 

ORDER REQUEST
HIGUCHI BIOSCIENCES CENTER
PHONE NUMBER 864-5140
FAX NUMBER 864-3578

To exit this screen without re-submitting order

Vendor:

Other Vendor:

Phone:

Fax:

Radioactive Material: No Yes

State Contract: No Yes

Est. Total: \$45.00

NOTE: Rows without a 'Description' will not be saved.

| # Needed | Unit (e.g. box) | Description | Catalogue Number | Unit Price | Est. Total | Account to Charge | Sub |
|--------------------------------|-----------------------------------|---|-------------------------------------|------------------------------------|--------------------------------------|-----------------------------------|----------------------|
| <input type="text" value="1"/> | <input type="text" value="unit"/> | <input type="text" value="item"/> | <input type="text" value="525566"/> | <input type="text" value="20.00"/> | <input type="text" value="\$20.00"/> | <input type="text" value="TEST"/> | <input type="text"/> |
| <input type="text" value="1"/> | <input type="text" value="each"/> | <input type="text" value="other item"/> | <input type="text" value="6552"/> | <input type="text" value="25.00"/> | <input type="text" value="\$25.00"/> | <input type="text" value="TEST"/> | <input type="text"/> |

Shipping: Next Day Second Day Ground

Attn:

Department:

Building:


Room:

Phone:

E-Mail:

Remarks:

Research Director: Nicole testDir

To re-submit order 

- h. After re-submitting the order, a message will be displayed indicating that the order has been copied. From that screen, you can click on the "Reports" tab (left corner) to go back to the report listing. If you are done, click "Logout" on the black bar at the top right-hand corner.

The screenshot shows a web browser window with the following elements:

- Browser Menu:** Disable, Cookies, CSS, Forms, Images, Information, Miscellaneous, Outline, Resize, Tools, view source, Options.
- Page Header:** Online Ordering (left), Session Expires In: 47:55 (right), Logout (far right).
- Logo:** A cluster of colorful spheres (blue, green, yellow, red, grey) on the left.
- Page Title:** **HIGUCHI BIOSCIENCES CENTER**
Online Ordering System
- Date/Time:** 06/18/2007 12:04:51 P.M.
- Navigation:** Reports (left corner).
- Message:** A yellow highlighted box containing the text: "The purchase order was successfully copied."
- Footer:** Thank you for your order. Once the order has been placed you will receive an Order Confirmation email.
© 2007 AlloFe Solutions All Rights Reserved