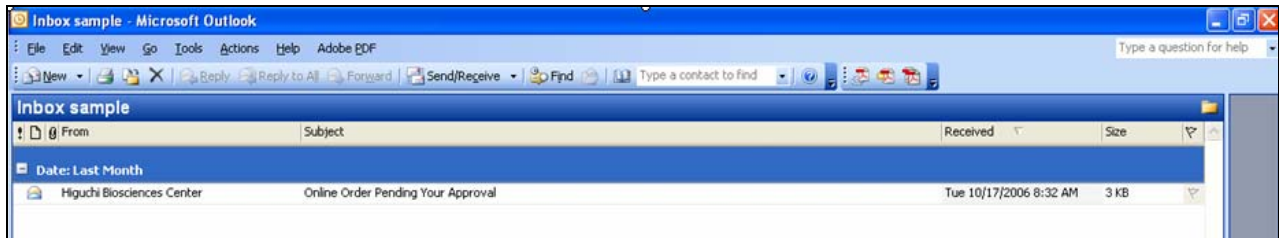


## HBC ONLINE ORDERING SYSTEM INSTRUCTIONS FOR PIs 5.09

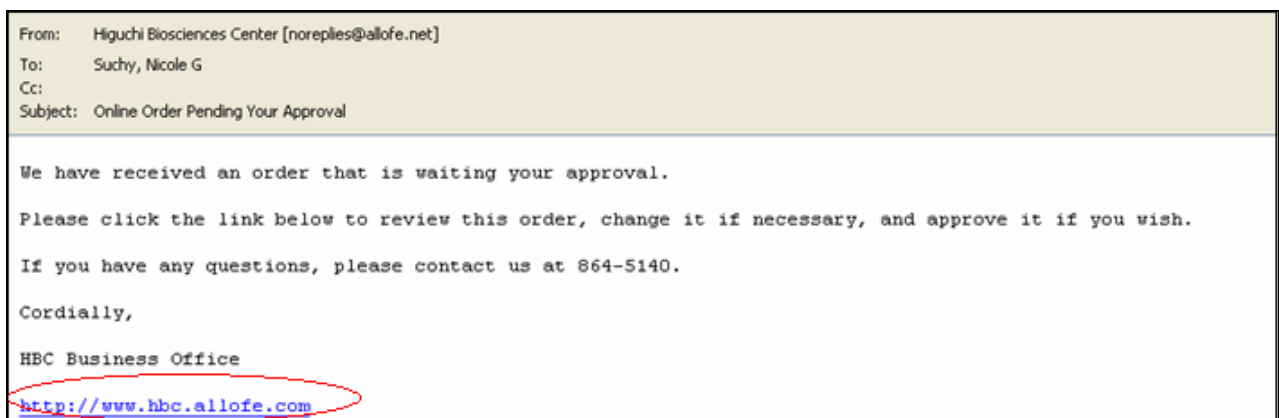
Please access the Online Ordering System (OOS) with the following browsers  
Windows: Internet Explorer and Mozilla Firefox  
Macs: Mozilla Firefox

### 1. To approve an order:

- a. You will receive an e-mail from HBC Orders stating that you have an order pending your approval.



- b. Click on the link in the e-mail.



- c. Enter your Username and Password.



- i. If you don't have a username and password contact the transactions group at 4-5140
- ii. If you've forgotten your password call the transactions group at 4-5140. HBC can change your password but we do not have access to your old password.

- b. All orders that haven't yet been approved will appear on your screen. Highlight the order you would like to view and click "Details."

Displaying 1 - 4 of 4

<input type="checkbox"/>	HBC PO	Ordered By	Created
<input checked="" type="checkbox"/>	HB07-6146	Nicole Suchy	2006-09-14
<input type="checkbox"/>	HB07-6145	Nicole Suchy	2006-09-14
<input type="checkbox"/>	HB07-6142	Nicole Suchy	2006-09-13
<input type="checkbox"/>	HB07-6135	Nicole Suchy	2006-09-12

Details [1] | Approve [M] | Cancel Order [M]

- c. Review the order carefully.

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

Est. Total: \$239.60

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

Number 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="cs"/>	<input type="text" value="25 mL pipets"/>	<input type="text" value="13-678-11"/>	<input type="text" value="107.02"/>	<input type="text" value="\$107.02"/>	<input type="text" value="26022"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text" value="cs"/>	<input type="text" value="10 mL pipets"/>	<input type="text" value="13-678-11E"/>	<input type="text" value="49.11"/>	<input type="text" value="\$98.22"/>	<input type="text" value="26022"/>	<input type="text"/>
<input type="text" value="2"/>	<input type="text" value="pk"/>	<input type="text" value="2 mL microcentrifuge tubes"/>	<input type="text" value="02-681-321"/>	<input type="text" value="17.18"/>	<input type="text" value="\$34.36"/>	<input type="text" value="44230"/>	<input type="text"/>

Shipping:  Next Day  Second Day  Ground

Deliver To:

Department:

Building:

Room:

Phone:

E-Mail:

Remarks:

Research Director:

- i. You may add an item to the order by clicking "Add Row" and then filling in the appropriate information.
- ii. You may delete an item from the order by clicking anywhere on the row (it will become highlighted) and then clicking "Remove."
- iii. Before approving the order you MUST double-check that a grant number is indicated in the "Account to Charge" field.
- iv. When you are finished click "Save Changes."

- d. After reviewing the order details, check mark all the orders you want to approve and then click “Approve”. You can also cancel orders by clicking on “Cancel”. Once it has been approved or cancelled you can’t make any changes to orders without contacting HBC.

Displaying 1 - 4 of 4

<input type="checkbox"/>	HBC PO	Ordered By	Created
<input checked="" type="checkbox"/>	HB07-6146	Nicole Suchy	2006-09-14
<input checked="" type="checkbox"/>	HB07-6145	Nicole Suchy	2006-09-14
<input checked="" type="checkbox"/>	HB07-6142	Nicole Suchy	2006-09-13
<input checked="" type="checkbox"/>	HB07-6135	Nicole Suchy	2006-09-12


Details [1]   Approve [M]   Cancel Order [M]

- e. Click “Logout” on the black bar at the top right-hand corner if you are done.

**Logout**

## 2. To place an order:

- a. Go to [www.hbc.ku.edu](http://www.hbc.ku.edu).

Address  <http://www.hbc.ku.edu/>

- b. Click on “Grant Services.”



- c. Click on “Online Ordering for HBC Administered Grants.”

[Online ordering for HBC Administered Grants](#)

- d. Click on “On-Line Order for Research Director Only”

[On-Line Order for Research Directors Only](#)

- e. Enter your Username and Password.

**Higuchi Biosciences Center**

User Name:

Password:

f. Click on “Create New Purchase Order”

Online Ordering Session Expires In: 47:40 My Info | Logout

**HIGUCHI BIOSCIENCES CENTER**  
Online Ordering System

08/30/2007 2:57:31 P.M.

Orders Reports **Purchase Orders**

**Filter**

HBC PO:  Ordered By:   
 Created:  Grant #:   
 Vendor:  Fiscal Year: 2008

[clear filter](#)

There are no purchase orders that match your filtering criteria. Try broadening your search.

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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

Est. Total: \$0.00

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
1	ea	item	12545	25.00	\$0.00	Test	
					\$0.00		
					\$0.00		
					\$0.00		
					\$0.00		
					\$0.00		
					\$0.00		
					\$0.00		

Shipping:  Next Day  Second Day  Ground

Attn:   
 Department:   
 Building:   
 Room:   
 Phone:   
 E-Mail:

Remarks:


a. 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.

- b. Indicate if the material is radioactive or not.
- c. Enter the quantity, unit size (each, box, pack, etc.), description, catalog number, and unit price.
- d. Enter the five-digit grant number (omitting the leading letters) for each line item.
- e. Select the shipping method.
- f. 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.
- g. You may enter quote numbers or any additional information in the “Remarks” field.
- h. 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. After HBC has placed your order, you will receive an e-mail with an attached confirmation.

From: Higuchi Biosciences Center [noreplies@allofe.net]  
 To: Suchy, Nicole G  
 Cc:  
 Subject: HBC Order Confirmation  
 Attachments:  purchase\_order\_confirmation.html (13 KB)

The attached file is a confirmation of an order we recently placed on your behalf.  
 Please examine it and let us know if you have any questions. You can contact us at 864-5140.

Cordially,  
 HBC Business Office

- j. Open the confirmation.

Order Confirmation Higuchi Biosciences Center													
HBC PO#: HB07-6146			Date Initiated: 9/14/2006			Deliver To: Nicole Suchy							
Vendor: Sigma Aldrich Marketing, Inc.			Date Ordered: 9/14/2006			Bldg / Room: McCollum / 129							
Spoke With: Daniel			Est. Delivery: 9/17/06			Department: HBC							
Reference Number: 62553344			Requested Shipping: Ground			Phone: 864-3572							
Payment:						E-Mail: nsuchy@ku.edu							
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			
Remarks:										Sub Total: \$ 68.35			Approved By: ADirector Test
										(H) Order Add'l: \$ 5.00			
										Est. Shipping: \$ 15.00			
										Grand Total: \$ 88.35			
<small>*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</small>													

- 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.

### 3. 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)

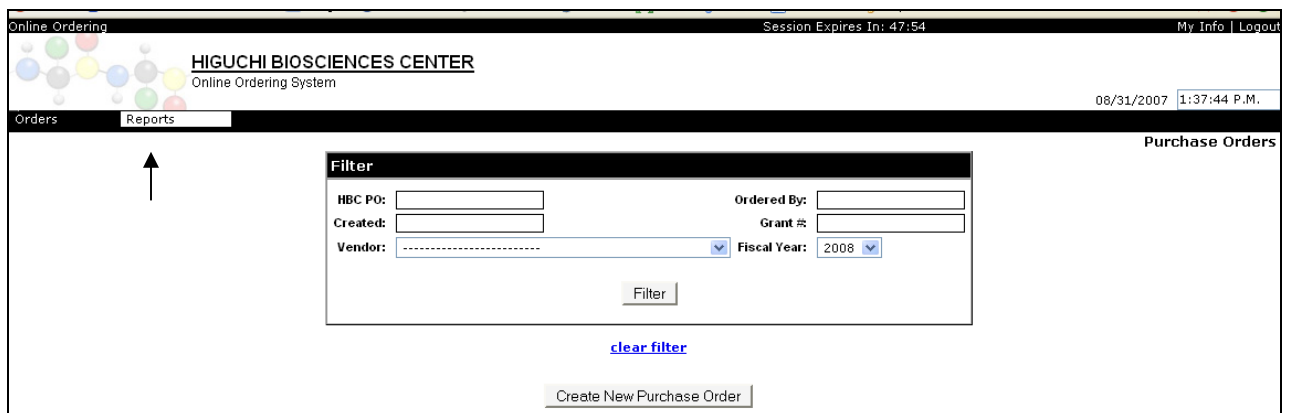
- a. Create an online order as usual, filling in whatever information you have (not necessary to include detailed sequences, etc). In the “Remarks” section note that you will be ordering these items yourself.
- b. Once HBC has reviewed the order, you will receive the normal e-mail confirmation. This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

### 4. 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 HBC has reviewed the order, we will let you know when the credit card is available for pick up.
- c. Return the card and receipt to HBC as usual.

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

- a. Log In the system (see steps 2a to 2d)
- b. Click on the “Reports” tab located on the right side of the screen.



c. 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"/>	











d. 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="6/31/07"/>
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.

erved

- i. “Created After”/”Created Before”-fill in *both* fields if you’d like to search by order submission date
  - ii. “Research Director”-select your name to see your 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).
- e. 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
	HB07-8284	06/18/2007	testDir, Nicole	TEST ORDER	06/18/2007	06/19/2007		AB Coker	Order Cancelled

- f. 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 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 to go back to the report listing. If you are done, click "Logout" at the top right-hand corner.

Online Ordering Session Expires In: 47:58 My Info | Logout

**HIGUCHI BIOSCIENCES CENTER**  
Online Ordering System

06/18/2007 12:34:59 P.M.

Orders **Reports** Purchase Orders

The purchase order was successfully copied

**Filter**

HBC PO:  Ordered By:

Created:  Grant #:

Vendor:  Fiscal Year:

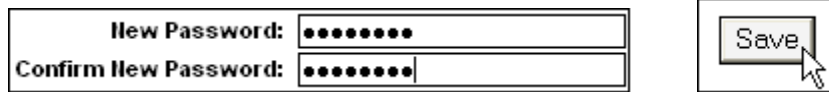
[clear filter](#)

## 6. To modify your password

- f. Click on “My Info” on the black bar in the top right corner.



- g. Type your new password in the “New Password” and “Confirm New Password” fields. Then click “Save.”

A screenshot of a password change form. It consists of two input fields. The first field is labeled "New Password:" and contains seven black dots. The second field is labeled "Confirm New Password:" and contains seven black dots. To the right of these fields is a rectangular button with the word "Save" written on it. A mouse cursor is pointing at the bottom right corner of the "Save" button.

- h. Click “Logout” on the black bar at the top right-hand corner.

**Logout**