

Impacted Business Area	NBS Acquisitions
NBS Role	Requisitioner-Internal
File Name	Create_or_Modify_a_Standing_Order
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Status	FINAL

Create_or_Modify_a_Standing_Order

Background:

This simulation is part of the NIH iProcurement Internal functionality which is utilized by multiple NBS Roles. This Navigation Guide provides step by step instructions on how to create a new Standing Order within iProcurement. Additionally, the steps for modifying an existing Standing Order are illustrated.

Additional Information:

User Starting Point: Most NBS step by step process instructions (computer-based training or Navigations) begin with the presumption that the user has first located the appropriate NBS Portal page and has then accessed the NBS Production link for the appropriate business area. For assistance with this process see the NBS Log On Instructions portlets within the NBS Share Point Portal pages.

Mouse Orientation: All references to "clicking" or other mouse actions are written with the presumption that the user's mouse has a right hand configuration.

For supportive information on how to view recorded simulations of this process using User Productivity Kit (UPK) go to the NBS Portal pages, NBS Support Resources portlet, Simulations and Computer Based Training link. Open the Introduction to UPK link.



Procedure

Sample Scenario: You need to create a Standing Order. All of the required data is provided during the applicable steps of these step by step instructions.

Upon completion of this process, you will be able to:

- Create a new Standing Order within iProcurement.
- Modify an existing Standing Order within iProcurement.

<u>Note</u>: There can only be one Item on a Standing Order. Separate Standing Orders will need to be set up if additional Items are need on a recurring basis.

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1.	Begin this process by selecting the NIH iProcurement Internal responsibility in the Navigator section of the NBS Home page.
	Click the NIH iProcurement Internal link.



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2.	The functions associated with the selected responsibility display.
	Click the iProcurement Home Page link.



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3.	The iProcurement Home page displays.
	Click the Standing Orders tab. Standing Orders



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4.	The Search Standing Orders page displays.
	On this page, users can search for an existing Standing Order or create a new Standing Order.
	For this scenario, the steps for creating a new Standing Order are illustrated first.
5.	Click the Create Standing Order button. Create Standing Order



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Step	
6.	The Create Standing Orders page displays.
	Note that an Order Number has been assigned and is displayed in the Order column (18818 for this scenario).
7.	Click the Show All Details link to display the Order , Billing , and Delivery sections.



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Step	
8.	The Order, Billing, and Delivery sections display.
	First, enter or search for and select the applicable Item.
9.	For this scenario, click the Search for Item icon (magnifying glass to the right of the Item field).
	Note: If the Item Number is known, the user can enter it directly into the Item field.



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10.	The Search and Select: Item page displays in a new window.
	Users have the option to search for the Item by Item Number or Item Description. For this scenario, the steps for searching by Item Description are illustrated.
	Click the Search By dropdown button.



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11.	Click the Item Description list item. Item Description
12.	Click in the Search By field.
13.	Enter the applicable information into the Search By field. For this scenario, enter " Tissue Culture Dish ".
14.	Click the Go button to initiate the search.



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15.	The search results display.
	For this scenario, click the Quick Select icon for Item Number 664000L013477 (Tissue Culture Dishes # 191-0081).



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Step	
16.	The Create Standing Orders page redisplays with the selected Item.
	Click in the Quantity field.
17.	Enter the desired quantity into the Quantity field.
	For this scenario, enter "2".



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18.	Within the Order section, the following fields are available:
	 <u>Description</u>: User can optionally enter a description of the Item. <u>Status</u>: This is a required field and it defaults to "Active". The other two status options are "Cancelled" and "Hold". Users can change the status as needed. <u>Start Date</u>: This is a required field and it defaults to the current date. Users can change the Start Date as needed. It is recommended that users do not change this date as this date does not reflect the date your first Items will
	 be delivered. <u>End Date</u>: Users can optionally set a date when the Standing Order is to be discontinued. If an End Date is not entered, the Standing Order will remain valid indefinitely until it is cancelled.
19.	For this scenario, click in the Description field.



Step	
20.	Enter the desired information into the Description field.
	For this scenario, enter "Tissue Culture Dish".
	For this scenario, no additional Order information is needed. The default status of "Active" and the default Start Date will be utilized. Additionally, no End Date will be entered.

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21.	Within the Billing section, the following fields <u>must</u> be populated:
	 <u>Project</u>: Enter or search for and select the applicable Project Number (CAN). <u>Task</u>: The Task Number is <u>always</u> 1. <u>Expenditure Type</u>: Enter or search for and select the applicable Expenditure Type (OC Code). <u>Expenditure Org</u>: Enter or search for and select the applicable Expenditure Organization (sometimes referred to as the SAC Code).



Step	
22.	Click in the Project field.
23.	Enter the applicable Project Number into the Project field.
	For this scenario, enter "100081".
	<u>Note</u> : Users can also utilize the Search and Select icon (magnifying glass to the right of the Project field) provided to search for and select the applicable Project Number.

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Step	
24.	A list of values matching the Project Number entered displays and the user can select the applicable Project Number.
	For this scenario, click the 100081 list item.
25.	Click in the Task field.



Step	
26.	Enter the Task Number into the Task field.
	Enter "1".
27.	Click in the Expenditure Type field.
28.	Enter the applicable Expenditure Type into the Expenditure Type field.
	For this scenario, enter "268B".
	<u>Note</u> : Users can also utilize the Search and Select icon (magnifying glass to the right of the Expenditure Type field) provided to search for and select the applicable Expenditure Type.

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29.	A list of values matching the Expenditure Type entered displays and the user can select the applicable Expenditure Type.
	For this scenario, click the 268B SSF-LABORATORY SUPPLIES list
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30.	Click in the Expenditure Org field.
31.	Enter the Expenditure Organization or known portion of the Expenditure Organization into the Expenditure Org field.
	For this scenario, enter "HN21".
	<u>Note</u> : Users can also utilize the Search and Select icon (magnifying glass to the right of the Expenditure Org field) provided to search for and select the applicable Expenditure Organization.

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Step	
32.	A list of values matching the Expenditure Organization entered displays and the user can select the applicable Expenditure Organization.
	For this scenario, click the HN21 NINR OD OFFICE OF THE DIRECTOR list item.

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Step	
33.	Within the Delivery section, the following fields are available:
	- <u>Frequency</u> : Required Field. Utilize the dropdown button and select
	the desired frequency of delivery. The frequency options are Daily, Weekly,
	Bi-Weekly, and Monthly.
	- Day of Delivery : The user can optionally select the day of delivery.
	The values include dates of the month $(1,2,3)$ and days of the week
	(Monday, Tuesday).
	- Deliver On Holiday: Required field that defaults to "Next". This
	indicates that the delivery will be made the next day when a delivery date
	falls on a holiday. Users can change this as needed. The other two options
	are "Bypass" and "Previous".
	- Deliver-To Location: Enter the NIH building location that the Items
	will be delivered to.
	- Delivery: Flr/Wing/Rm : Enter the applicable floor, wing, and/or
	room information for delivery.
34.	Click the Frequency dropdown button.

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Step	
35.	For this scenario, click the Weekly list item. Weekly
36.	Click the Day Of Delivery dropdown button.

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Step	
37.	For this scenario, click the vertical scrollbar to scroll down and view the remaining values.



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Step	
38.	For this scenario, click the Monday list item.
39.	For this scenario, the Deliver on Holiday default value of "Next" will be utilized. Click the Search for Deliver-To Location icon (magnifying glass to the
	right of the Deliver-To Location field).



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Step	
40.	The Search and Select: Deliver-To Location page displays in a new window.
	Click the Go button to initiate the search.



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	0		2115 E Jefferson St GDC	MSC 8500 Suite 4B 432, Bethesda, MD 20892-8500, United States	NIH Com Branch	nmercial /	Account	
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Step	
41.	The search results display.
	For this scenario, click the Quick Select icon for the 12401 Washington Ave, Rockville, MD 20852, United States location.



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Step	
42.	The Create Standing Orders page redisplays.
	Click in the Delivery:Flr/Wing/Rm field.
43.	Enter the applicable information into the Delivery:Flr/Wing/Rm field.
	For this scenario, enter "10th Floor, Room 1053".
44.	Once all of the applicable information for the Standing Order is entered, click one of the Apply buttons.



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Step	
45.	The Search Standing Orders page redisplays and the user receives a message stating that the Standing Order has been created.
	<u>Note</u> : The Standing Order just created does not display. To confirm that the Standing Order was created, users can perform a search using the Standing Order Number or by changing the Status search criteria to "Active".
	For this scenario, the steps for searching for an existing Standing Order utilizing the Standing Order Number are illustrated.
46.	Click in the Standing Order Number field.
47.	Enter the applicable Standing Order Number into the Standing Order Number field. Enter " 18818 ".
48.	Click the Go button to initiate the search.



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Step	
49.	The search results display. Users can view the full details for a Standing Order by clicking the Standing Order Number link in the Order column. Click the Standing Order Number (18818 in this scenario) link.



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Step	
50.	The Standing Order page displays and can be reviewed as needed.
	Once the review is complete, click the Return to Standing Orders Search link. Return to Standing Orders Search



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Step	
51.	Next, the steps for modifying an existing Standing Order are illustrated.
	First, users must search for the applicable Standing Order as previously illustrated. In this scenario, we will modify the Standing Order that we just searched for.
52.	Click the Update icon.



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	* Project	100081 🔄 🔍		* Frequency	Weekly 💌		
	* Task	1 🗳 🔍	[Day Of Delivery	Monday	•	
	* Expenditure Type	268B SSF-LABORATOR	* н	oliday Delivery	Next 💌		
	Expenditure Date	30-Jul-2015	* • * •	* Location	12401, ROCK		
	Expenditure Organization	HN21 NINR OD OFFICI	* Deliver Flo	or Wing Room	10th Floor, Roo	om 1053	
Return t	to Standing Orders Search						Cance <u>l</u> A <u>p</u> ply
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Step	
53.	The Update Standing Order page displays.
	Users can modify any of the editable fields as needed.
	For this scenario, the steps for modifying the desired frequency are illustrated.
54.	Click the Frequency dropdown button.



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Description	Tissue Culture Dish	Item	n Description	664000L01347 Tissue Culture		081
* Status Start Date	Active 30-Jul-2015		Unit	CASE		
End Date	50-501-2015		* Quantity	2		
		Delivered				
Billing		Delivery				
* Project	100081		* Frequency	Weekly 💌		
* Task	1 2	Da	ay Of Delivery	Bi-Weekly Daily	•	
* Expenditure Type	268B SSF-LABORATOR	* Hol	liday Delivery	Monthly		
Expenditure Date	30-Jul-2015		* Location	Weekly	ʻL 🔄 🔍	
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Step	
55.	The list of values display.
	For this scenario, click the Bi-Weekly list item. Bi-Weekly
56.	Once all desired edits are made, click one of the Apply buttons.



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Done							Gul	ocal intrane	t Protected Mor	de: On	🕼 🗸 🔍 1009	6 -

Step	
57.	The Search Standing Orders page redisplays and the user receives a message stating that the Standing Order has been updated.
58.	Click the Home link at the top of the page to return to the NBS Home page.



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Personalize				Full Lis	t	
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iProcurement Home Page	From	Туре	Subject	Sent Due		
	There are no notifications in this					
	♂ TIP <u>Vacation Rules</u> - Redirect ♂ TIP <u>Worklist Access</u> - Specify					

Step	
59.	Congratulations! You have successfully created and modified a Standing Order within iProcurement. End of Procedure.