

Step-by-Step Guide

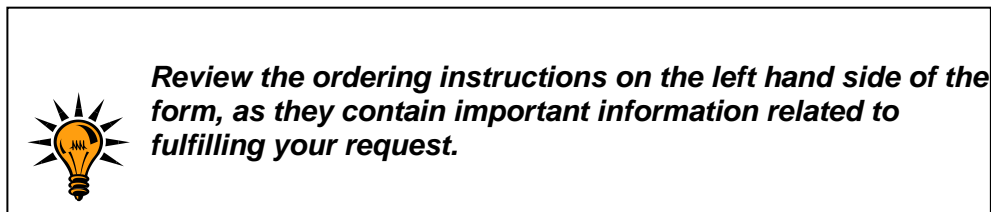
Initiating an Investigator Order Form

Procedure

1. From the **Home/Shop** screen, select the **Investigator Order Form** link from the **Showcased Services** section of the screen.




2. The Investigator Order form appears in a new window.



3. Populate the **Contact Information** section of the form with the appropriate information for the requesting parties. Fields with bolded descriptions are required.

Contact Information	
Principal Investigator	Dr. Jane Doe
Contact Name	Bob Smith
Telephone Number	577-2428
Department	Biology
Protocol Number	ABC1234

4. Repeat the same process for the **Animal Specifications** section of the form.
5. Populate the **Order Information** section of the form. Utilize the links to supplier websites located on the right hand side of the form to determine pricing for the requested specimens. Enter accurate price estimates in the **Unit Price** field.
6. Select the **Add and go to Cart** option from the **Available Actions** dropdown box and then click the **Go** icon. The request has been added to your shopping cart. *(If you are adding multiple items under one Protocol click here for separate job aid)*
7. Select the  icon to view the contents of your cart. The Animal order request is displayed. You can click the **Assign Cart** icon and forward the draft cart to a department requisitioner (if applicable) for final processing OR proceed to step 8.

8. From the **Shopping Cart** screen select the **Add Non-Catalog Item** icon within the existing to add a line item to capture estimated shipping costs.

Do not use

Have you made changes? Perform an action on (0 items selected)

Harlan [more info...](#)
 Purchasing Buy From 1
 Sprague Dawley, Inc., 8520 Allison Pointe Blvd, Suite 400, Indianapolis, IN 46250-5702 US

Product Description		Unit Price	Quantity	Total
Item added on Jun 22, 2012 <input type="button" value="Add to Favorites"/> <input type="button" value="Remove"/> <input type="button" value="More Actions"/>				119.96 USD
mice, albino open form... Sex Male Strain abcd type 1234aaabbbccc Weight / Age 4oz				
Unit Price		29.99 USD	4	119.96 USD



Adding a line item for estimated shipping and handling allows approvers to have full visibility of the total cost of the order prior to approving the request.

9. Enter *Estimated Shipping and Handling Costs* in the **Product Description** field. In the **Quantity** field, enter 1. In the **Price Estimate** field. *(Please note: this will give the DLAR Procurement Specialists a defined dollar threshold to proceed with your order requests. If the final order amount is outside of this estimate, DLAR will confirm the higher price with the department prior to order issuance.)* From the **Commodity Code** field, select the *Scientific Equipment; Maintenance Contracts; Supply Items; Repairs* value. Select the **Save and Close** icon.

Hilltop Lab Animals, Inc. [select different supplier](#)

Fulfillment Address Purchasing Buy From 1: (preferred)
 PO Box 183
 Scottsdale, PA 15683-0183 US
[select different fulfillment center](#)

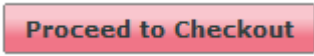

Distribution Methods

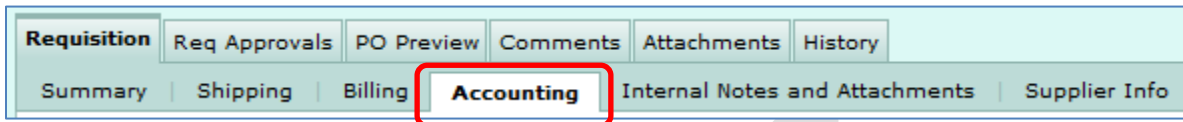
Product Description	Catalog No.	Quantity	Price Estimate	Packaging
Estimated shipping and handling		1	45	EA - Each

223 characters remaining [expand](#) | [clear](#)


Product Details

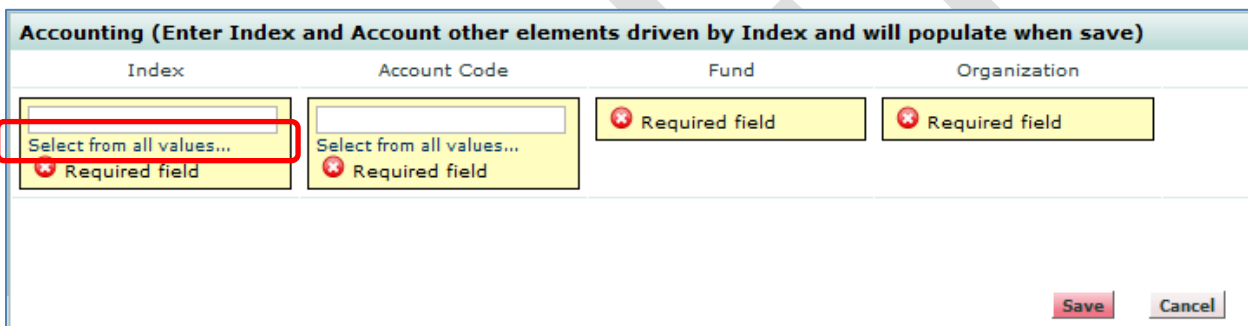
Commodity Code Controlled substance
 Recycled

10. Select the  icon. The **Requisition Summary** screen is displayed.
11. Select the  process step or click the **Accounting** tab under the Requisition window (shown below).



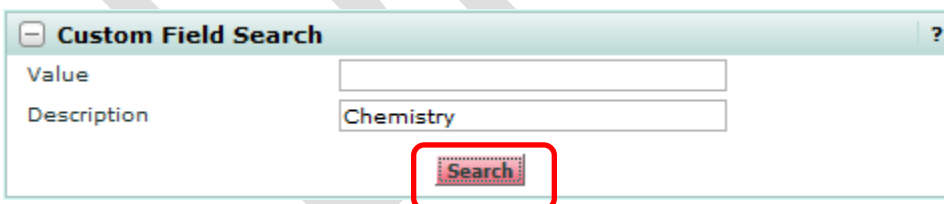
The screenshot shows a navigation bar with several tabs: Requisition, Req Approvals, PO Preview, Comments, Attachments, History, Summary, Shipping, Billing, Accounting, Internal Notes and Attachments, and Supplier Info. The 'Accounting' tab is highlighted with a red rectangular box.

12. Select the  icon for line item containing the animal order request. A pop-up window will appear with the existing accounting information for the requisition line (or entire requisition if so selected). Select the [Select from all values...](#) link for the **Index** field OR enter your 6 digit **Index** (in known already) and skip to step 16.



The screenshot shows a pop-up window titled "Accounting (Enter Index and Account other elements driven by Index and will populate when save)". It has four columns: Index, Account Code, Fund, and Organization. Each column has a text input field. Below the Index and Account Code fields are links that say "Select from all values...". Below the Fund and Organization fields are "Required field" labels with a red asterisk icon. At the bottom right are "Save" and "Cancel" buttons. The "Select from all values..." link for the Index field is highlighted with a red rectangular box.

13. A search box is displayed. Enter search criteria in either the **Value** or **Description** fields and select the  icon.



The screenshot shows a dialog box titled "Custom Field Search" with a close button and a help icon. It has two input fields: "Value" and "Description". The "Description" field contains the text "Chemistry". Below the input fields is a "Search" button, which is highlighted with a red rectangular box.

14. A list of search results is returned. Select the link next to the appropriate index value.

Value	Description	
060153	Johnson/Pfizer End Chair Chemistry	select
060154	Schaap End Chair Organic Chemistry	select
060332	Rorabacher Endowed Fd in Chemistry	select
066015	Stevens End Lectureship Chemistry	select
070722	Chemistry Building Tile Replacement	select
124573	Science-Chemistry-Dean's Res	select
125006	Chemistry-Course Materials	select
125021	Chemistry	select

15. The Accounting pop-up box is updated with the selected index value.


Index	Account Code	Fund	Organization
<input type="text" value="125021"/> Select from all values... * Required field	<input type="text"/> Select from all values... * Required field	111168 * Required field	12E1 * Required field



Selecting an Index value will automatically populate the Fund, Organization, Program, Activity, and Location fields. Index and Account Code are the only two fields users are required to populate on a requisition.

16. Enter in 721Y5 for the **Account Code** field.

The screenshot shows a web form titled "Accounting (Enter Index and Account other elements driven by Index and will populate when save)". The form has a table with columns: Index, Account Code, Fund, Organization, Program, Activity, Location, and add split. The "Index" column contains the value "125021". The "Account Code" column contains the value "721Y5", which is highlighted with a red rectangular box. Below the table, there are "Save" and "Cancel" buttons.

17. Select the  **Final Review** process step and review the information contained on the request. Make any required changes.

18. Click the  **Submit Requisition** icon. The request is submitted into the workflow and a confirmation message is displayed containing the unique identifier of the request.

The screenshot shows a "Requisition Information" dialog box with a green checkmark icon. The text reads: "Congratulations! You have successfully submitted your request. If you need to view or print a copy, click [Quick View](#) or view its status on the [Approvals Tab](#)." Below this is a summary of the requisition: "Here is a summary of the requisition. You can also retrieve this requisition at any time via the document history search page." A table lists the following details: Requisition number (782021 view), Requisition status (Pending), Cart name (2012-05-23 ab7093 13), Requisition date (5/23/2012), Requisition total (97.57 USD), and Number of line items (1). The "Requisition number" and "782021 view" are highlighted with a red box. At the bottom, there are links for "Search for another item", "View order history", "Check the status of an order", "Return to your home page", and "Create new draft cart".



When completing the form you also have the opportunity to "Add to Favorites" under the Available Actions link. This will allow you to save the request as a template for future use. Please contact the Procurement Office for a walkthrough @ (313)577-3734.