Standing Order Request Quick Reference

Non-Catalog Screen for Standing Orders

Overview

- Log into HCOM at:
  - [http://vpf-web.harvard.edu/applications](http://vpf-web.harvard.edu/applications)
  - Click on Personal Homepage
  - Click HUC
  - Login with HUID & PIN
  - Click HUC

- Non-Catalog Purchase Prerequisites:
  - All Pre-Order Research, Pricing and Item Details for a Non-Catalog Request is performed by the school/unit
  - The Unit will research vendors
  - The Unit will research pricing
  - The Unit will obtain a quote that will be used for the price and item detail information which will be used as the item description in the Non-Catalog Request Form

- Access Non-Catalog Request:
  - Click on the Non-Catalog Request link for Non-catalog Requests and Standing Orders.

- Logout of HCOM after working on Requisitions, click the Logout link.

- Help Contacts:
  - For technical issues, contact the HU IT Help Desk: dls@harvard.edu or x6-2001
  - For customer service issues, contact University Financial Services-AP Customer Service: ap_customerservice@harvard.edu or x5-8500, option 1
### Creating a Standing Order in HCOM

**What is a Standing Order:** Standing Orders can be created to purchase pre-negotiated recurring services where payments are made throughout the fiscal year against static account coding using the Non-Catalog Request in HCOM. A standing purchase order can accommodate multiple invoices over an extended period of time.

1. Most Standing Orders are governed by a **contract** signifying the total amount of services to be performed by the vendor.
2. Track receipts of the Standing Order by invoice for services billed by amount or quantity.
3. Invoices for services are delivered directly to your department, where you will identify the amount to be paid directly on the invoice.
4. Send the invoice to University Financial Services Accounts Payable, 1033 Massachusetts Avenue, 2nd Floor, Cambridge, MA 02138 for payment.

### Overview: Procedure for Creating and Receiving a Standing Order:

1. Contact the vendor to request the service you need and obtain a service contract or quote from the vendor.
2. Create a Non-Catalog Request in HCOM and generate the Purchase Order.
3. Print a copy of the Purchase Order from HCOM.
4. Instruct the vendor to reference the Purchase Order number on all invoices for these particular services.
5. Fax or email the Standing Purchase Order to the vendor.
6. As invoices are delivered to the local unit, acknowledge receipt in HCOM.
7. Write the following information on the invoice:
   - The **Purchase Order Number** of the Standing Order
   - Indicate the **amount being paid** for each line on the invoice
8. Forward the invoice to UFS Accounts Payable, 1033 Massachusetts Avenue, 2nd Floor, Cambridge, MA 02138 to process the vendor payment.

### Set the Local Bill-To Address

When creating a Non-Catalog order for services, Shoppers are advised to change the bill-to address on the Purchase Order from University Accounts Payable to their local unit. The local unit will then receive the invoices and can verify invoice amounts to insure accurate payment processing.

To set the Local Bill-To Address:

1. Select **Preferences** from the HCOM homepage.
2. Click **Services Bill To Override**.

![Image of Preferences settings](image)

3. Enter information for the following fields:
   - **Bill To Attn of Name/Department**: Enter the name of the person to whose attention the invoices should come.
   - **Bill To Attn of Room/Floor**: Enter the room/floor information of the person to whose attention the invoices should come.
   - **Bill To**: Click to search for address. Select Address from Search by drop-down menu; type % and enter either street number or name, add a second % and click Go.

4. Click **Submit**.

Please note: You only have to set this Preference once.

5. Click **Shop** to return to Homepage.
6. Click **Non-Catalog Request**.

### Accessing the Non-Catalog Request Form

1. From the HCOM Homepage, click on the Non-Catalog link:

![Image of Non-Catalog Request Form](image)

2. When the form opens, select the Item Description:
   - If you select **Goods or services billed by amount**, review the remainder of the screen in **Option 1**
   - If you select **Services billed by quantity**, review the remainder of the screen in **Option 2**
Option 1: Goods or Services Billed by Amount

3. Completed the **Item Description**: include details about what is to be ordered as well as business purpose and date information. *Note that this information appears on the CREW Detail Listing Report.*

4. The **Category** field will be set to **NON-CAT PURCHASE** by default and cannot be changed.

5. **Enter Amount**: Enter Total dollar amount of purchase.

Confirm **Currency**. The default is **USD** for US Dollars. All Non-Catalog Requests should be in USD. If you need to place an order in foreign currency, see the next section.

**Non-Catalog Requests in Foreign Currency**

All Non-Catalog Requests should be paid in US dollars. If you do need to pay a non-catalog request in foreign currency, follow these steps to convert them to US dollars:

1. Convert foreign currency amount into US dollars, basing the rate conversion on the invoice date. Use the UFS [Currency Calculator](#) and add an additional 10% to this total to cover currency fluctuations.
2. Create a Non-Catalog Request. In the Amount field, enter the invoice total as US Dollars (+10%).
3. Submit the Non-Catalog Request for approval. Follow normal Non-Catalog Request procedures to submit the request for processing.

Note: If the exchange rate has fluctuated in excess of $9.99 above the Non-Catalog Request price (conversion rate +10%), the request will go on price hold and the final approver will be contacted for approval before payment is issued.

6. **Search for the Supplier and Site**: Type in part of the vendor name and click 🔍. Select vendor by clicking ✅. Both Supplier and Supplier Site fields will be filled in.

7. **Optional: Add Contact Name**: If you have the information. Note that based on the vendor selected, this field may be filled in for you.

8. **Optional: Add Phone number**: If you have the information. Note that based on the vendor selected, this field may be filled in for you.

9. **Optional: Add Supplier Item**: If you are using a vendor catalog and there is an item number for the good, you can add the number in this field.

10. **Click** ✅. To add additional lines, type in new Item Description and Amount, and **click** ✅. When finished, **click** ✅.
Option 2: Services billed by Quantity

1. Completed the **Item Description**: include details about what is to be ordered as well as business purpose and date information. *Note that this information appears on the CREW Detail Listing Report.*

2. The **Category** field will be set to **NON-CAT PURCHASE** by default and cannot be changed.

3. Enter **Quantity**: Enter the number of items or, in the case of a service by quantity, number of hours, days, etc.

4. Review the **Unit of Measure**: The default is set to **Each**. If you wish to select a different value, click **Go**. You will be able to page through many units of measure choices; select the choice you want by clicking.

5. Enter **Unit Price**: Enter the price per unit.

6. **Confirm Currency**: The default is **USD**, for US Dollars. All Non-Catalog Requests should be in USD. If you need to place an order in foreign currency, see the **Non-Catalog Requests in Foreign Currency** section on pg. X of this document.

7. **Search for the Supplier and Site**: Type in part of the vendor name and click **Go**, Select vendor by clicking **Go**. Both Supplier and Supplier Site fields will be filled in.

8. **Optional: Add Contact Name**: If you have the information. Note that based on the vendor selected, this field may be filled in for you.

9. **Optional: Add Phone number**: If you have the information. Note that based on the vendor selected, this field may be filled in for you.

10. **Optional: Add Supplier Item**: If you are using a vendor catalog and there is an item number for the good, you can add the number in this field.

11. **Click** **Add to Cart**.

   To add additional lines, type in new **Item Description, Quantity and Unit Price**, and click **Add to Cart**.

   When finished, **click** **View Cart and Checkout**.

Checkout: Shopping Cart Screen

1. If applicable, edit **Item Description**

2. **Asset Tags** are not relevant to Standing Orders; skip this field.

3. **Add Line Level Notes**: Add additional business purpose information to the Line Level Notes section. This information is helpful to Approvers. This information does not appear on the CREW Detail Listing Report.

   You can delete lines from the Shopping Cart by clicking on the next to the line.

4. **Click on** **Checkout**.
Checkout: Requisitions Description Screen—Services Request

You can edit all fields on this screen.

1. Enter Requisition Description to summarize entire order.

2. Receiving Required box no longer available.

3. Need By Date, Requestor and Deliver-To Building fields all fill in from Preferences: You can override any of these values.
   - To confirm Deliver-To Building: Click to see current address.
     - If address is incorrect: Select Address from Search by drop-down menu; type % and enter either street number or name, add a second % and click Go. Select correct address by using
   4. Fill in Attn of Name/Dept.

5. Fill in Attn of Room/Floor

If these fields will be the same most of the time, check off Set Attn Lines as Default checkbox.

6. Confirm Charge Account is correct: Default account will appear from Preferences.

7. Confirm Bill-To address is correct.
   - a. If you have not set the Bill-To address in Preferences, you can type it in.
   - b. If you want the invoice to go to UFS Accounts Payable, and not your local unit, check off the

8. Click Next.
How to Change Charge Accounts (Goods or Services)

Changing Account Code Numbers
You can change the existing number or split-code

To change the existing Account Code:
1. Click on Charge Account Link twice
   - Option 1: Select Nickname from drop down menu (if Preferences were set)
   - Option 2: Type over existing value
   - Option 3: Search for a value

To search for a value:
- Click
- Type in as much of the account string that you know and click Search.
- Select code by click radio button and then click Select.

To Split-Code:
1. Click
2. Click
3. Find the split-code value using one of the options above.
4. Split line by Percent, Quantity or Amount

Click Apply twice when changes are complete.

Requisition: Checkout: Approvals and Notes Screen

Check approver name. If correct, no further action is required.

Manage Approvals
Add Note to Approver and Supplier
Add Attachments
**Note:** All fields on this screen are optional. Actions you can perform on this screen are:

- Manage Approvals (add an approver or change first approver)
- Add a Note to Approver or Supplier
- Add or delete an attachment

**Manage Approvers**

**Default Approver:** The name of your default Approver(s) will appear in the approval string at the top left of the screen.

If you need to add an approver or change the default approver, click the Manage Approvals radio buttons appear.

**Add Approver**

Select the Add Approver radio button to add an additional approver(s) to this Requisition, if needed. (**Note:** The button is selected on opening.)

- Enter Approver’s last name and click .
- Select name by clicking . Click at bottom of page.
- Select whether the Approver should appear before or after the default Approver.
- Click .

**Change First Approver**

If this is not the Approver that should approve the Requisition, use Change First Approver to replace the existing Approver.

- Click the Change First Approver radio button.
- Type in New First Approver’s last name and click .
- Select name by clicking . Click at bottom of page.
- Click .

**Vendor Justification Section**

If you are making a grant payment and the cost of the item is more than $4,999.99, you must complete the Vendor Justification section. Select the appropriate Justification Reason and Pricing Review Code from the list of values. Enter Justification Explanation and Pricing Other Explanation where applicable.

If the item is more than $24,999.99, use the horizontal scroll bar to navigate to the Debarment Certification column and select the appropriate Debarment Certification information in the list of values.
Checkout: Review & Submit Screen

Optional: You can print this screen:
1. Click **Show** link next to all Requisition Lines to see account coding.
2. Click **Printable Page**.

Click **Submit** to submit Shopping Cart.

Confirmation Screen

You will receive a Requisition Number. HCOM will forward the Requisition to your Approver. The Approver will receive an email that the Requisition is awaiting his/her approval.

Click **Continue Shopping** or **Shop** to return to Homepage.

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After Final Approval

1. Shopper will receive an **email** indicating that Requisition is Approved and Purchase Order is created. **The purchase order number for all Non-Catalog Orders begins with a 7**.
2. Shopper **logs into HCOM** to retrieve the Purchase Order.
3. From the Homepage, click on the **Requisitions Tab**:

   ![Oracle iProcurement](image)

4. The Purchase Order number will appear on the right hand side of the screen, click on the **Purchase Order number link**:

   ![Standard PO](image)

5. The **Standard PO** screen will open. Click on the **Attachments link** next to **View**:

   ![Standard PO Attachments](image)

6. Click on **PO_XX [where XX=number].puff document link**:
7. The Purchase Order will open:

![Image of a Harvard University Purchase Order]

- **Type**: Standard Purchase Order
- **Purchase Order**: 7000037729
- **Revision**: 0
- **Order Date**: 23-AUG-2012
- **Created By**: John Harvard (TRAINER1)
- **Created by Email**
- **Revision Date**

8. To print: click on the Print icon. To Save: Click on File, then select Save As
9. Fax or email the Purchase Order to the vendor.
<table>
<thead>
<tr>
<th>Receiving Requirements</th>
<th>Receiving against a Service Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Receiving is required for:</td>
<td></td>
</tr>
<tr>
<td>− All purchases &gt;$2,499.99</td>
<td></td>
</tr>
<tr>
<td>• If you are a Shopper/Approver with Self-approval privileges, Self-approval is not</td>
<td></td>
</tr>
<tr>
<td>allowed for purchases over $2,499.99 or sponsored purchases regardless of the amount</td>
<td></td>
</tr>
<tr>
<td>− Receiving functionality is still available for purchase orders under $2,500, but</td>
<td></td>
</tr>
<tr>
<td>it does not affect two-way match or payment</td>
<td></td>
</tr>
</tbody>
</table>

**Receiving Invoices for Services**

When processing an invoice for services note the following:

- If you created the Non-Catalog Request choosing **Goods or services billed by amount**, be sure to receive the dollar amount of the invoice.
- If you created the Non-Catalog Request choosing **Services bill by quantity**, be sure to receive the correct quantity on the Receiving Tab.

If you receive the dollar amount against a Services billed by quantity order, you may over-receive the amount, resulting in the invoice being placed on price hold.
Receiving a Standing Order

Rules of Thumb

- If only a portion of the Purchase Order is to be paid, receive only what was invoiced.

Refer to the Holds, Receiving, and Returns Quick Reference for more information on receiving orders.

Receiving an Invoice

1. Click the Receiving tab.
2. Click the Requisition link.
3. Click the Select checkbox beside each line item to receive.
4. In the Receipt Quantity column:
   i. Indicate the dollar amount that was invoiced if the Purchase Order was created via Goods or services billed by amount.
   ii. Indicate the quantity that was invoiced if the Purchase Order was created via Services billed by quantity.
5. Best practice: enter Receipt Comments and include vendor invoice number in the comments. This will allow you to retrieve the invoice number information later using the Receiving Details Report.
6. Make sure the invoice contains the PO number; write in if necessary.
7. Send the received invoice to University Accounts Payable, 1033 Massachusetts Avenue, 2nd Floor, Cambridge, MA 02138.

Receiving an Invoice-Split-Coded Order

For a Split-coded Standing Order, be aware that the system will deduct the expenses equally along the coded lines.

To see the split-coding account codes:

1. Click on the Requisition Number link you wish to view.
2. Click on the icon to open the Details screen.
3. Click on the Show Additional Information link to see the account coding.
5. Continue the receiving process as documented in the last section.
6. On the invoice, indicate what percentage of each line should be paid to each account code.
## Changing Standing Orders After Final Approval

HCOM Shoppers have the ability to change a Non-Catalog Order after approval.

Here is how the process works:

1. The **Shopper** initiates the change request.
2. If the change results in a price increase, the change request will be re-routed through the Approval Hierarchy for authorization. If the change request results in a price decrease, the change request will be automatically processed.
   - The Shopper can then fax, email or otherwise contact the vendor with the PO information.

What can be changed: Here are the fields that a Shopper can change for each Item Type on a Non-Catalog or Payment Request:

- Need by Date
- Quantity
- Price*
- Cancel PO Line

*Note that it is not possible to change price on a Non-Catalog Order for Goods or services billed by quantity; change the Quantity field.

**Note:** A Purchase Order change is best made after the approval but before the order is faxed, emailed or communicated to the vendor. If you need to make a change to a Purchase Order after the vendor has received the Purchase Order, you must contact the Vendor first and confirm the change before following the steps below to make the changes in HCOM.

**Note:** Review the [Change a Non-Catalog Order or Payment Request After Approval Quick Reference](http://eureka.harvard.edu) for more information—find this on Eureka at [http://eureka.harvard.edu](http://eureka.harvard.edu).