Inter-Departmental Order (eSeeIDO) Manual
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Overview

- Overriding policy for new system:
  
  Request ——> Approve ——> Complete

- The IDO System (eSeeIDO) is a **Saint Louis University** designed feature in Banner Finance Self Service:

  [https://myslu.slu.edu/](https://myslu.slu.edu/)

- **Access** to the eSeeIDO system is granted to authorized Banner Finance users. Users may enter IDO requests against funds/orgs that agree with their Banner Finance security.

- **Approval** routing is the same as purchase requisitions, except that IDOs less than $500 do not require Commitment Office approval.

- The system automatically **encumbers** funds after all approvals are recorded; and liquidates the encumbrance when the service is completed.

- The system features **Standing IDO’s** which may be used multiple times for the same service type. Requestors may use the same IDO number until the approved amount is fully depleted. There is no option to increase the limit of a standing IDO. The user must prepare a new order.

- On-line query is available for **tracking** the status of IDO’s. All information is maintained within the eSeeIDO system.
Creating an IDO - Request Entry Screen

Users begin the request entry process at the eSeeIDO – Request Entry screen.

1. After logging in to Banner Self Service, click the Finance tab. Then click the eSeeIDO – Process an IDO link.

2. **IDO's with pending status**: Click the drop down to select from a list of documents that the requestor previously saved (and has not yet submitted) or for documents that have been disapproved and have not been re-submitted. **This option will display only if the user has pending documents.**

   eSeeIDO document numbers are eight-characters and assigned as follows:

   - **T#####**: Temporary document number assigned when user starts a new request
   - **XR#####**: Regular IDO Request (eight characters)
   - **XS#####**: Standing IDO Request (eight characters)

3. **Service Type**: Choose one of the predefined standard service types or Generic IDO. The service type determines what information you must provide in order to complete the IDO. For services not defined, you may select “generic” IDO service request.

4. **Standing IDO**: Users have the option of clicking the Standing IDO box to establish a standing order for a particular service type or a generic order.

   By default, IDO’s are created as regular IDO’s. The requestor must click the Standing IDO box to create a Standing IDO. Standing IDO’s have the prefix “XS”.

Updated 9/24/13
Regular and Standing IDO’s are entered and approved the same way.

A Regular IDO is closed as soon as the service is completed. The service provider may charge an amount greater than the approved order amount. There is a field in which the service provider may enter a description or explanation of the services, reason for difference in amount, etc. The requestor and service provider also have the option of forwarding any documentation to the Controller’s Office for scanning into Xtender.

In case of a Standing IDO, the service department “partially” completes the IDO for each service request filled. As long as there is a balance in the IDO, the requestor may quote the IDO number for repeating service of the same kind. The system maintains the cumulative usage of the IDO. When the standing IDO balance is near zero, the service department uses the last service request to close the IDO. The final amount may exceed the current balance. Again, there is a field in which the service provider may enter a description or explanation of the charges as each partial order is filled.

There is no option to increase the limit of a standing IDO. The user must prepare a new order.

Not all service providers accept standing IDO orders. See Appendix A for the list of standard service providers.

5. **Copy from IDO#:** Users may copy eSeeIDO’s, both “T” and “X” documents (including canceled documents); the requestor must enter the IDO number as upper case.

   When copying, the requestor must choose a Service Type. In addition, the requestor must also check the Standing IDO box, if a standing order is desired.

6. Click **Proceed** to continue.
Creating an IDO - Order Details Screen

Proceed with entering the IDO order details.

1. **IDO Number:** System displays NEW until the requestor presses enter in a data enterable field or clicks the **Save for later** button (system assigns “T” number), or **Submit now** button (system assigns “X” number).

   The “T” number is temporary and no information posts to Banner. It will be converted to an “X” number when submitted.

   The encumbrance and actual transactions (multiple for standing orders) associated with a specific request post to Banner with the same “X” reference number.

2. **IDO Status:** System displays NEW until requestor presses enter in data enterable field or clicks **Save for later** button (status changes to Pending) or **Submit now** button (status changes to Awaiting Approval); see Appendix B for status definitions.

3. **Service Type:** Displays service type selected by the user at the “Request Entry” screen.
4. **Standing IDO:** Based on user checking the box at the “Request Entry” screen.

5. **Transaction Date:** Defaults to the current date and should not be changed unless the user is creating a new fiscal year requisition.

To create a new fiscal year requisition in the old fiscal year, change the **Trans Date** to 01-JUL-200\(n\) \(n = \text{new fiscal year}\).

6. **Required Date:** This is the date the service is needed and defaults to the current date. The date may be overridden; if changed, it must be equal to or greater than current date. The requestor should follow up with the service provider to verify that the date is reasonable.

7. **Requestor Name, Orgn, Email, Phone, Your SLU Net ID:** Defaults from the user’s Banner security record.

8. **Required Information:** The service type selected by the requestor determines the required fields (maximum of six required fields with 50 characters available for text). The fields validate the following:

   - **Date:** Requestor must enter the date in the following format: DD-MMM-YYYY or DD-Full Spelling of Month-YYYY (for example, 26-Sep-2007 or 26-September-2007).
   - **Number/Quantity:** Requestor must enter a number.
   - **Characters:** Requestor may enter any combination of numbers, letters, or symbols.

   For generic IDO’s, enter the order details at the **Description of Service** field.

   For **standing orders**, the user may enter “0’s” (zeroes).

9. **Description of Service (required):** This field is required for all orders.

10. **Email this request to:** Indicates the Banner Finance user who will be notified after the document has completed approvals.

   - **Standard requests:** The list of usernames is based on the service type selected. An automated e-mail is sent to the username displayed on the screen or the username selected from the drop down by the requestor; all users listed on drop down may view and/or take action on the order.

   - **Generic requests:** Requestors must enter a valid SLU username (excluding the slu.edu extension). An automated e-mail message is sent the username identified by the requestor. This is the only person who may take action on the order.

11. **Expense Accounting Distribution:** See next

12. **Fund Code:** There is no limit to number of debit fund numbers; the screen always displays three blank rows. The fund codes must be active and not terminated, and the requestor must have fund/org security to the fund(s)/org(s). A red box displays around invalid fund codes when the requestor presses **Enter** or clicks **Save for later** or **Submit now** buttons.

13. **Orgn Code:** Defaults to the org associated with the fund and cannot be changed.

14. **Account Code:** Defaults from the service type and cannot be changed. For generic IDO’s the requestor must enter the account code. See Appendix D for a list of valid generic account codes.

Updated 9/24/13
15. **Actv Code:** The activity code(s) must be active and not terminated.

16. **Amount:** Determines approval queue(s); approvals based on each FOAPAL amount and not IDO total amount; if service department charges an amount not equal to the ordered amount, cost is distributed to multiple FOAPAL’s explicitly (i.e., entered manually by service department administrator) or allocated by same percentage as originally submitted (service department administrator checks % distribution box).

17. **IDO Total Amount:** Sum of Amounts entered on each accounting line; system does not calculate quantity and unit costs in Required Information fields.

18. **Press enter** before clicking **Save for later** or **Submit now** or **Remove** or **Exit**. The system will validate your information and alert you of any errors that must be corrected before proceeding.

   **Save for later:** System assigns T# and Pending status; no entries are posted to Banner. Click Exit to return to the Request Entry screen.

   **Submit now:** System assigns X# and generates e-mail notification to approvers. Click OK to proceed.

Users may then return to the Request Entry screen or proceed to the Query/Approval/Completion screen.

**Remove:** Deletes document and document history; users may only remove a pending IDO. (User may need to click **Remove** twice.)

Users may then return to the Request Entry screen or proceed to the Query/Approval/Completion screen.

**Exit:** Brings the requestor back to Request Entry screen; if the requestor enters data and then clicks Exit, the system does not save the information; the user must press enter in any data enterable field to save the data (or click **Save for later**).
The eSeeIDO – Query/Approval/Completion screen displays all documents that the user may access. Users may access documents that they initiated, that they have fund/org security to view, or that they may complete as one of the identified service providers (or the single provider for Generic orders).

1. After logging in to Self Service Banner, click the Finance tab. Then click the eSeeIDO – Query/Approval/Completion link.

2. Approvers may click Find at the bottom of the screen to view a list of documents awaiting approval. Or users may query based on the following:

   **Enter the IDO you are looking for:** Enter the eight-character IDO number using upper case.

   **By Status:** The default status is *Awaiting Approval*. See Appendix B for a description of each status.

   **All documents you may approve:** Check this box to view a list of all documents that agree with your fund/org security, and that are in awaiting approval status.

   **By Requestor/Provider:** Enter the user’s SLU Net ID, upper case, excluding the @slu.edu extension. If one person initiates the request and another person submits the document, the Requestor Name and associated information changes to the person who submitted the document.

   **From Date/To Date:** Change the default dates as necessary to view documents within a particular date range. This is the document Transaction Date.

3. Click Find to view the query results.
4. Click **View** from the Query/Approval/Completion screen to query the document with no updating allowed:

5. Or click **Approve** from the Query/Approval/Completion screen to modify, approve, reject, or cancel the document.
Order Details

The approver may change the Transaction and Required dates, the Required Information, the Description, the service provider, the dollar amount, and/or the Activity Code. Changes to any of these fields generate an automated e-mail message to the requestor.

**Validate:** Click validate if you make changes to verify that any changes are accepted by the system.

**Undo ALL Changes:** Click to undo the updates that the approver has just made.

**Approve:** Click to approve the request. The following message displays to inform the final approver that an encumbrance will be generated in Banner Finance (and may be viewed at INB form FGIENCD or SSB Encumbrance Query):
This action generates a **one-time** e-mail message to the service provider indicated in the **Email this request to** field:

**Reject:** Click to disapprove the request.

**Note:** Before clicking **Reject**, enter a **reason** into the Description of Service field and enter your name and date. This will provide valuable information to the requestor.

**Cancel Order:** Click to cancel order. No further action is allowed after canceling an IDO Request. Click Exit to return to the Request Entry screen.

<table>
<thead>
<tr>
<th>IDO Number</th>
<th>IDO Status</th>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>XR.000564-0</td>
<td>Cancelled</td>
<td>CM96206 - Comparative Medicine</td>
</tr>
</tbody>
</table>

**Exit:** Click to return to the Request Entry screen.
Completing an IDO – Service Providers Only

The eSeeIDO – Query/Approval/Completion screen displays all documents that the user may access. Users may access documents that they initiated, that they have fund/org security to view, or that they may complete as one of the identified service providers (or the single provider for Generic orders).

1. After logging in to Self Service Banner, click the Finance tab. Then click the eSeeIDO – Query/Approval/Completion link.

2. Service providers may click Find at the bottom of the screen to view a list of all documents, regardless of status, that they may access. Or users may query based on the following:

   **Enter the IDO you are looking for:** Enter the eight-character IDO number using upper case.

   **By Status:** Click the drop down and select Approved. See Appendix B for a description of each status.

   Please note that the Approved selection displays all documents that you may access, that are in approved status. All documents may not currently require action.

   **By Requestor/Provider:** Click the drop down to select from a list of usernames. Displays documents requested or submitted by a particular user, and documents completed or partially completed by that user (if applicable).

   **From Date/To Date:** Change the default dates as necessary to view documents within a particular date range. This is the document Transaction Date.

3. Click Find to view the query results.
4. Click **View** from the Query/Approval/Completion screen to query the document with no updating allowed:

5. From the Query/Approval/Completion screen, click **Partial** to partially complete a standing order, or **Complete** to complete a regular order or the last transaction for a standing order.
6. The service provider should enter a description at the **Recovery Charges Description** field. This may eliminate the need to generate a paper invoice. If a paper invoice is required, indicate the “X” document number in the upper right corner and forward to CPC-Financial Commitment for scanning/indexing, or forward a .pdf file to financial_commitment@slu.edu.

7. Enter the dollar amount(s), as appropriate, at the **Recovery Accounts** field.

8. Click **Charge expense accounts proportionally by percentage** box to allocate charge to debit fund(s). If there are multiple debit funds, this will allocate the charge proportionally to each fund. The requestor must provide specific instructions in the **Service Description** field if this is not the case.

9. Click **Validate** to verify that updates are accepted. If there are errors, the system will display alert box(es). Click OK to continue and correct errors.

10. Click **Partial** to partially complete order (this option is only available for standing orders).

The following message displays to inform the user that the associated encumbrance will be liquidated for the amount of this transaction:
The next message indicates that a journal entry debiting the requesting department fund(s) and crediting the service provider fund(s) will be posted in Banner Finance:

This action also generates a one-time only e-mail notification message to the requestor.

Click Exit to return to the Query/Approval/Completion screen.

11. Or click Complete to complete a regular order or to finalize a standing order.

The associated encumbrance will be liquidated to zero and a journal entry debiting the requesting fund(s) and crediting the service provider fund(s) will be posted in Banner Finance. An automated e-mail message will also be generated to the requestor.
Querying an IDO

The eSeeIDO – Query/Approval/Completion screen displays all documents that the user may access. Users may access documents that they initiated, that they have fund/org security to view, or that they may complete as one of the identified service providers (or the single provider for Generic orders).

1. After logging in to Self Service Banner, click the Finance tab. Then click the eSeeIDO – Query/Approval/Completion link.

2. In this example, we entered the document number at the **Enter the IDO you are looking for** field and then clicked **Find**:

The screen displays the IDO Number and the SQ (Sequence #) associated with each transaction. Click View at **Sequence #0** to see a summary of all activity associated with this IDO. Click one of the specific sequence numbers to see only that specific transaction.

In the following example, we clicked **View** for Sequence #0.
The screen displays the IDO Number, Sequence Number, Status, Service Type, Dates, Requestor, Service Provider, Amount, and Description.

**Expense Accounting Distribution**: Expense fund number(s), organization(s), and account code(s) are displayed. In addition, the screen displays the Original Encumbrance Amount, the Banner Encumbrance Balance (zero in this example because the order is completed), and the eSeeIDO Balance (−$500 because the total of the three transactions is $10,500).

**Recovery History**: In this example, the service department filled three requests. The transaction description entered by the service provider appears in the right column.

**Approval History**: Displays the approvals for the original service request. The "*" will indicates the username of the person who actually approved the request.

3. Click **Exit** to return to the Query/Approval/Completion screen.
Canceling an IDO

The eSeeIDO – Query/Approval/Completion screen displays all documents that the user may access. Users may access documents that they initiated, that they have fund/org security to view, or that they may complete as one of the identified service providers (or the single provider for Generic orders).

1. After logging in to Self Service Banner, click the Finance tab. Then click the eSeeIDO – Query/Approval/Completion link.

2. In this example, we entered the document number at the **Enter the IDO you are looking for** field and then clicked **Find**:

3. Click **View** to verify that this is the document to be canceled.

4. Click the **Back** button to return to the eSeeIDO – Query/Approval/Completion screen.

5. Click **Cancel Order** to cancel the order and liquidate any remaining encumbrance to zero. The following alert box displays:

   ![Alert Box](image-url)
6. Click OK to proceed.

7. Scroll to the bottom of the screen and click **Cancel Order**:

   ![eSeeIDO - Approved Orders Processing](image)

   In this example, the service provider is canceling the request. Canceling an IDO may be done in status of **Awaiting Approval** (by approver), **Approved** (by requestor, approver, or service provider), or **Partial** (by requestor, approver, or service provider).

8. Click OK to the alert boxes indicating that your request has been sent to Banner Finance and that the cancel order transactions have been created.

9. Click **Exit** to return to the Query/Approval/Completion screen.
Users may view scanned/indexed eSeeIDO documents in Xtender. At the eSeeIDO-Query/Approval/Completion results screen, click the appropriate “XR” or “XS” document number. The Xtender login screen will display. After signing into Xtender, enter the document number at the Document ID field and then click Submit. Or, go to Xtender from the mySLU (gateway.slu.edu) Tools tab and proceed with signing in and querying the document.
## Appendix A: Standard Service Providers

<table>
<thead>
<tr>
<th>Service Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSC Mail Services – Postage/Shipping</td>
</tr>
<tr>
<td>Biochemistry Electronic Shop</td>
</tr>
<tr>
<td>CWHM-Chemistry</td>
</tr>
<tr>
<td>CWHM-In Vitro Assays/Screening</td>
</tr>
<tr>
<td>CWHM-In Vivo Models</td>
</tr>
<tr>
<td>CWHM-Mass Spectrometry</td>
</tr>
<tr>
<td>Chaifetz Events</td>
</tr>
<tr>
<td>Comparative Medicine</td>
</tr>
<tr>
<td>Distribution Services-Moves/Other</td>
</tr>
<tr>
<td>EdTech AV Repair/Install</td>
</tr>
<tr>
<td>EdTech Instructional Media Support</td>
</tr>
<tr>
<td>EdTech Lab Materials</td>
</tr>
<tr>
<td>Environmental Safety</td>
</tr>
<tr>
<td>Facilities Mgmt Keys and Locks</td>
</tr>
<tr>
<td>Facilities Mgmt Other (not Moves)</td>
</tr>
<tr>
<td>HR Employment-Advertising</td>
</tr>
<tr>
<td>HR POD-Training</td>
</tr>
<tr>
<td>IRB</td>
</tr>
<tr>
<td>ITS Classes</td>
</tr>
<tr>
<td>ITS Computer Purchases</td>
</tr>
<tr>
<td>ITS Network Services</td>
</tr>
<tr>
<td>ITS Other Services</td>
</tr>
<tr>
<td>ITS Software Purchases</td>
</tr>
<tr>
<td>ITS Telephone Adds/Moves/Changes</td>
</tr>
<tr>
<td>Machine Shop Custom Work Machining</td>
</tr>
<tr>
<td>Machine Shop Signs</td>
</tr>
<tr>
<td>Marketing and Communications Services</td>
</tr>
<tr>
<td>Microbiology Flow Cytometer Facility</td>
</tr>
<tr>
<td>Microbiology Hybridoma Development Facility</td>
</tr>
<tr>
<td>Microbiology Microarray Facility</td>
</tr>
<tr>
<td>Parking &amp; Card Services Billiken Bucks Copy Card</td>
</tr>
<tr>
<td>Parking &amp; Card Services Billiken Bucks Student Financial Aid</td>
</tr>
<tr>
<td>Parking &amp; Card Services Coupons/Tokens</td>
</tr>
<tr>
<td>Parking &amp; Card Services Event Parking</td>
</tr>
<tr>
<td>Parking &amp; Card Services Volunteer Parking Permits</td>
</tr>
<tr>
<td>Pathology Services</td>
</tr>
<tr>
<td>Pius Special Collections</td>
</tr>
<tr>
<td>SLUCOR</td>
</tr>
<tr>
<td>Solutions</td>
</tr>
<tr>
<td>Transportation (Van) Services</td>
</tr>
<tr>
<td>University Health Plan</td>
</tr>
<tr>
<td>Water Tower Inn-Athletics Dept.</td>
</tr>
<tr>
<td>Water Tower Inn-Employee Moving Expense</td>
</tr>
<tr>
<td>Water Tower Inn-Other</td>
</tr>
<tr>
<td>Water Tower Inn-Patient Travel</td>
</tr>
</tbody>
</table>
Appendix B: eSeeIDO Status Definitions

Status:

**Denied** – denied by an approver, available for edit and resubmission. Status becomes Pending when someone edits this IDO.

**Pending** – initiated, saved and not finished (T# assigned).

**Awaiting Approval** – submitted and in approval process (X# assigned).

**Approved** – all levels of approval are complete; encumbrance is created and e-mail to service provider is generated.

**Partial** – associated with standing IDO’s only; partially completed by service provider; encumbrance is liquidated; actual transaction is generated.

**Completed** – fully completed or final; encumbrance is closed; actual transaction is generated.

**Cancelled** – action can be taken by anyone with security access to this IDO; can be done in status of Awaiting Approval (by approver), Approved (by requestor, approver, or service provider), or Partial (by requestor, approver, or service provider); encumbrance is closed; will be tracked in the system.

Actions:

**Remove** – deletes Pending IDOs; no tracking or evidence in the system once removed. System will automatically Remove all Pending IDOs 30 days or older. (Activates when user signs on to eSeeIDO).

**Reject** – action available when IDO is in Awaiting Approval status; changes the status to Denied; e-mail is generated to notify the requestor.

**Approve** – action available when IDO is in Awaiting Approval status; changes the status to Approved; e-mail is generated to notify the service provider.

**Partial** – action associated with standing IDO’s only; performed by service provider to post transaction for services provided; encumbrance is partially liquidated; actual transaction is generated; and e-mail notification is sent requestor. Order remains open until it is canceled or until the service provider posts a charge that exceeds remaining balance available.

**Complete** – action associated with regular or standing IDO’s only; performed by service provider to post transaction for services provided; encumbrance is closed; actual transaction is generated; and e-mail notification is sent to requestor. Order is closed.

**Cancel** – action available to approvers while document is in approval status, or to the requestor or service providers for approved documents that have not been completed; closes encumbrance and order.

**View** – opens IDO in view mode only; update is not allowed.
Appendix C: Generic Requests

Requestors may select one of the predefined standard service types or Generic IDO. The service type determines what information you must provide in order to complete the IDO. For services not defined, you may select “generic” IDO service request.

*Enter sufficient information in the Description of Service field for the service provider to complete your request.

*Enter a valid Banner Finance user’s SLU Net ID (excluding the @slu.edu extension) at the Email this request to field. This is the user who will receive your and complete your request.

*Enter a valid fund, account, and activity (if applicable) code at the Expense Accounting Distribution field.

Listed below are examples of generic IDO debit/credit account code combinations:

<table>
<thead>
<tr>
<th>Debit/Credit Account Codes</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>771xxx</td>
<td>General Expense (Debit)</td>
</tr>
<tr>
<td>92xxxxx</td>
<td>Recoveries (Credit)</td>
</tr>
<tr>
<td>744200</td>
<td>Copier Usage (Debit)</td>
</tr>
<tr>
<td>744200</td>
<td>Copier Usage (Credit)</td>
</tr>
<tr>
<td>887012</td>
<td>Nonmandatory Transfer Out (Debit); both debit and credit funds must be Designated (2xxxxx)</td>
</tr>
<tr>
<td>886012</td>
<td>Nonmandatory Transfer In (Credit); both debit and credit funds must be Designated (2xxxxx)</td>
</tr>
</tbody>
</table>
Appendix D: eSeeIDO Tips

General Tips:

1. Press Enter after reading alert boxes (users do not need to click OK).

2. View the document status in the upper right corner of the Order Details Screen or the Query/Approval/Completion screen.

3. The IDO request exists only in eSeeIDO until the point that it completes approvals. When all approvals are recorded, the transaction is posted to Banner Finance as an encumbrance that may be viewed on INB form FGIENCD or the SSB Encumbrance Query.

4. The first time that you sign on to eSeeIDO, this page may display when you select the Query/Approval/Completion screen. This is because the user does not have any IDO requests to view.

5. When copying a document, the requestor must choose a service type and click Standing IDO, if applicable.

6. Date fields must be entered in the following format: DD-MMM-YYYY or DD-Full Spelling of Month-YYYY.

7. The first two letters of the eight-character eSeeIDO number must be entered as upper case when copying or querying.

8. The document numbers are displayed in three different colors so that the user may distinguish temporary, regular, and standing orders more easily.

9. View summary of encumbrance activity at INB form FGIENCD or SSB Encumbrance Query.
10. E-mail notifications are generated by the following actions:

<table>
<thead>
<tr>
<th>Action</th>
<th>Recipient(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requestor submits an IDO request</td>
<td>Approvers</td>
</tr>
<tr>
<td>Approver disapproves an IDO request</td>
<td>Requestor</td>
</tr>
<tr>
<td>Approver makes change(s) to an IDO request</td>
<td>Requestor</td>
</tr>
<tr>
<td>Final approver approves an IDO request</td>
<td>Service provider</td>
</tr>
<tr>
<td>Service provider completes or partially completes an order</td>
<td>Requestor</td>
</tr>
</tbody>
</table>

For Requestors:

1. Press **Enter** at the Order Details Screen before clicking **Save for later** or **Submit now** or **Remove** or **Exit**. The system will validate your information and alert you of any errors that must be corrected before proceeding.

2. For standing orders, the requestor must enter values in the Required Information fields. See below for suggested values:

   - **General information fields**: enter “Various”
   - **Number fields** (requiring a number of items ordered): enter “0” (zero) and explain in Description of Service that specific order requests will follow
   - **Date fields**: enter 01-JUL-2008

3. At the Order Details screen, the requestor must press enter in any data enterable field to save the data (or click save for later). If the requestor enters data and then clicks Exit, the system does not save the information.

ForApprovers:

1. Enter a reason in the **Description of Service** field when you disapprove or cancel an IDO.

2. Please note that the Awaiting Approval selection displays all documents that are currently at your approval level.

   - **All documents you may approve**: Check this box to view a list of all documents that agree with your fund/org security, and that are in awaiting approval status.

For Providers:

1. Enter a description in the **Recovery Description** field when you partially complete, complete, or cancel an order. You should also explain any price differences here. For canceled orders, this will be a record of why the order was canceled. Usage of this field may eliminate the need for a paper invoice, phone calls, etc.

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