Lab Hound Bloodhound

Administrators Guide
Version 0.3
January 2008

Lab Hound Technology

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Contents

1 Introduction

Thank you for purchasing the Bloodhound module of the Lab Hound system. The Bloodhound module is designed to simplify laboratory ordering, inventory management, and sample receiving. This manual will provide detailed directions on using Bloodhound and getting the most out of your system.

Technical Support Resources

We hope that this manual can answer most of your questions. If other problems arise, we have established a number of technical support resources:

- A community forum at `http://www.lab-hound.com/phpbb`. The developers and co-founders participate in this forum.
- Email support is available at support@lab-hound.com. Email support requests will be handled within 5 business days.

2 Installation

Done. (Now that was easy, wasn't it? The Lab Hound system is designed for use in small labs that do not have dedicated IT staff or personnel. All elements of your system including setup, maintenance, and backup are handled by Lab Hound staff. There is no software for you to install or hardware for you to configure.)

We suggest that you take the time you expected to spend configuring the system and go outside. Enjoy the sunshine, or, if you live in Wisconsin, the snow.

3 Logging in to the Bloodhound module

In this chapter you will login to the Bloodhound module and change your administrator password.

System Requirements

Your new Lab Hound system can be accessed via any Internet connected computer using a web browser.

Internet: Optimal performance requires a 1.5 Mbs DSL or faster broadband internet connection. Modem users should have success using the system but may encounter periodic slowdowns.

Windows 2000, NT, XP, and Vista: We recommend using the free web browser Firefox. The most recent version of Firefox can be downloaded from `http://www.mozilla.com/firefox/`

Mac OSX: We recommend using Safari or Firefox. Safari comes pre-installed on all Apple computers shipped after October, 2003. Mac OSX versions of Firefox can also be found at `http://www.mozilla.com/firefox/`

Linux: We recommend using Firefox.

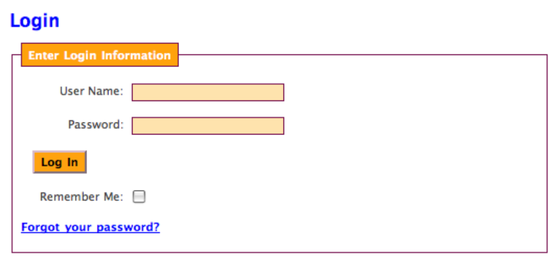
Finding Your Lab Hound URL

After you subscribe to the Bloodhound module, you will receive an e-mail from our technical support staff containing the URL that you will use to log into your system. The URL will likely look something like this:

`https://sslws023.alentus.com/labhound/applications/labhound/webdemo/Login.aspx`

You might notice that your Bloodhound module is located on servers owned by Alentus. Alentus has provided website and database hosting services to thousands of small- to medium-sized companies for more than 10 years and was ranked as a top Windows Hosting provider for several years by an Independent Review panel commissioned by Web Host Magazine & Buyer's Guide. Their technology partners include Cisco, Microsoft, and Dell.

Please open your web browser and navigate to this URL now. Once you are successfully connected to your Lab Hound system, you should see a password splash screen that looks like this:



In the same e-mail that contains the URL that you use to log onto your site, you will also receive an administrator password and username from our staff. Please print this e-mail for your records and store it in a safe place. In order to maximize the security of each laboratory's Lab Hound system, your initial administrator username and password are automatically generated and not shared with anyone else including Lab Hound Technology staff. Initially, the administrator is the only user of the system who can create new users and define the roles and activities for other laboratory staff.

Because of the powerful options available to the administrator, we recommend that each lab designate one individual to be the site administrator. This individual will be responsible for maintaining and managing all other user records. We do not recommend creating additional administrator users, however this option is available from within the system.

The Lab Hound Homepage

After you login you are greeted with your personalized Lab Hound homepage. As the administrator you have access to all system functions. The navigation pane on the left side of the screen, termed the sidebar, displays the three types of controls available to administrators:

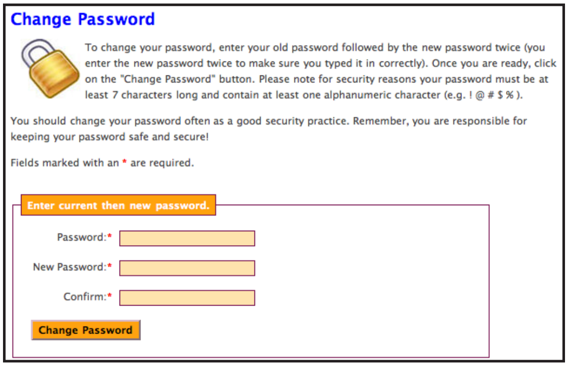
1) Subscription modules - The Bloodhound ordering module is the first module released by Lab Hound Technology. Therefore, it is the only module currently available. As new modules are developed, a laboratory's menu of subscribed modules will appear in this menu.

2) System Administration - This is where administrators create new user accounts for individual laboratory members. System Administration will be discussed in Chapter 4.

3) My Account - This tab allows existing users to change their password and update their contact information.

Changing Your Password

Even though the default administrator username and password are generated automatically, we strongly encourage each administrator to change their password to one that is both secure and easy-to-remember. To change the password, select Home > My Account > Change Password. You should see a screen that looks like this:



In order to maximize the system security, Lab Hound requires the use of strong passwords that cannot easily be guessed. A more thorough discussion of password strength can be found at `http://en.wikipedia.org/wiki/Password_strength`

Acceptable passwords for the Lab Hound system must :

• Be at least 7 characters long AND

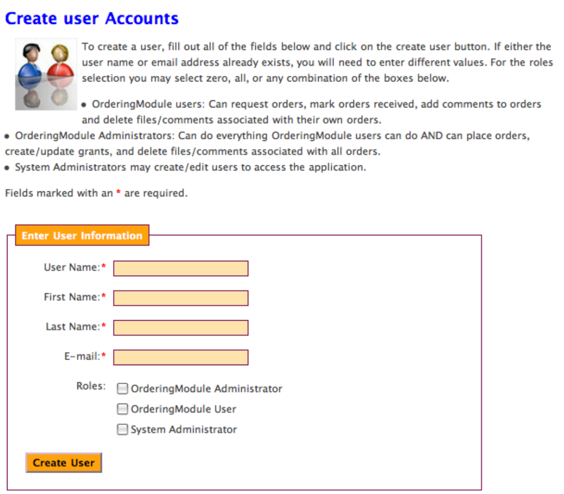
• Contain at least 1 non-alphanumeric character (e.g., ! @ # $ %)

Please take this opportunity to change the default administrator password.

4 Creating and Managing Users

At this point you have successfully logged in to your Lab Hound system and modified your primary administrator account's password. In this chapter you will learn how to create and manage accounts for individual users in the lab.

To begin, login to your Lab Hound system as the administrator. Navigate to Home > System Administration > Create Accounts. You should see a page that looks like this:



A new account should be created for every member of the laboratory.

Roles

One of the most powerful aspects of the Lab Hound system is its flexibility. As scientists ourselves, we recognize that every laboratory is organized differently and strive to make all Lab Hound modules compatible with a wide variety of lab management strategies. For each module within Lab Hound, a user will have a set of assigned roles that defines how they can interact with the system. In the case of the inaugural Bloodhound purchasing module, there are thee different roles that a user can have:

• Ordering Module User - Users in this category can request orders in the Bloodhound module, mark orders received, and add/edit/delete comments and files associated with their own orders. In addition, these users can also search through all requested orders. from the entire laboratory.

•Ordering Module Administrator - All of the functions available to Ordering Module Users plus the ability to add and edit Research Grant information, place orders with vendors, and add/edit/delete information associated with orders from all other users.

Note that there is also a System Administrator role. System Administrators are the only users who can create, edit, and delete user accounts. This is an

over arching role that applies to all modules of a laboratory's Lab Hound system.

The Bloodhound ordering model

Lab Hound Technology developed the conceptual framework for the Bloodhound system when confronted with the challenge of managing orders in a very large academic laboratory with a mix of approximately 50 faculty, staff, and students. The system was designed to provide a simple, organized, and efficient mechanism for managing supplies purchases. Prior to implementation of the system, dozens of individual items would be requested each day by laboratory members, each of whom would go to the product catalog and fill out a form detailing the item's cost, description, and catalog number as well as the vendor's contact information. The forms were emailed to one of 4 laboratory members who were designated to contact companies and actually place orders. After emailing the order request, an end-user had no way to track an order's progress without asking the person who placed the order. This process was cumbersome for a number of reasons including:

• General laboratory staff did not know when their orders were placed with the vendor or when their products arrived

• General laboratory staff needed to retrieve vendor contact details each time they placed an order; if 5 users placed an order from the same vendor, each user would look up the contact independently

• There was no simple way to reorder commonly used products

• General laboratory staff had no way of monitoring other lab orders, resulting in inadvertent duplicate orders

• Personnel responsible for placing orders were consistently interrupted by email requests

• There was no way to check whether a particular order fit within budget

• Requests with incomplete or inaccurate information were difficult to prevent

Though these issues are common to most academic laboratories, there are few economical and simple solutions. We developed the Bloodhound module to address this unmet need.

In the Bloodhound system, an order is broken apart into three different parts: requesting an order, placing an order, and receiving an order. Each of these three components will be discussed below.

Requesting an Order

The first step in ordering is requesting an order. This is the action where a user identifies a product that needs to be ordered. In systems that do not use the Bloodhound module, requesting an order is often done informally. This can take many forms, including telling the person responsible for placing the order, writing the order on a lab whiteboard, or completing an Excel spreadsheet or paper form. In smaller laboratories, the person who requests the order might also be the person who places the order. The order request in this case might be as simple as thinking "hey, I need to buy more enzyme."

There are three basic types of information associated with each order request:

There are many different ways that laboratories request orders. The Bloodhound module is designed to use a simple web-based form to replace and improve on all these methods.

1. Item information. What is being requested? How much does it cost? How many are being ordered?
2. Vendor information. Who manufacturers the item being requested? How can they be contacted for purchasing? What is the full mailing address for billing and account payments?
3. Lab-specific information. What grant is being used to order the item being requested? Does this grant have enough money remaining to fund the purchase? Who in the lab is ordering the product? Where should the product be stored upon arrival?

One point to note is that most ordering systems require users to consciously or subconsciously answer all of these questions for every request. This is unnecessarily redundant, since in many cases laboratories order many different products from the same vendor. Often, the same products are reordered from the same vendor, so the only information that changes from order to order is the lab-specific information. The Bloodhound ordering system is designed to streamline as much of this process as possible for each order request.

The Bloodhound system also performs cursory validation of order requests. Information such as "item name" must be included for an order to be accepted by the system, preventing orders with incomplete information from being submitted. While this might be seen as an unnecessary hindrance initially, requiring users to input complete order requests greatly simplifies the process of placing orders with vendors and reordering products in the future.

Placing an Order

The act of contacting the vendor (or a proxy that contacts the vendor on your behalf) is known as 'Placing an Order' in the Bloodhound system. This action carries with it a great deal of responsibility, as orders that are placed and returned are often subject to a significant restocking fee. Therefore, in many larger laboratories order placing is restricted to a few specially trained individuals. In smaller laboratories, everyone might be entrusted to place orders directly with vendors. Both configurations are supported by the Bloodhound system.

We know that different laboratories and institutions handle vendor communication differently. Some prefer to email their orders, others phone them in, while others either use a web-based e-commerce site or delegate the responsibility to departmental staff. The Bloodhound system accommodates all of these possibilities by enabling users to simply designate that a product has been ordered, irrespective of how the order was placed. Behind the scenes, the Bloodhound system records the time that the status of the order is changed to 'ordered' and the user who placed the order. This allows individuals who request orders to know whether or not their requests have been forwarded on to the vendor for order fulfillment.

Receiving an Order

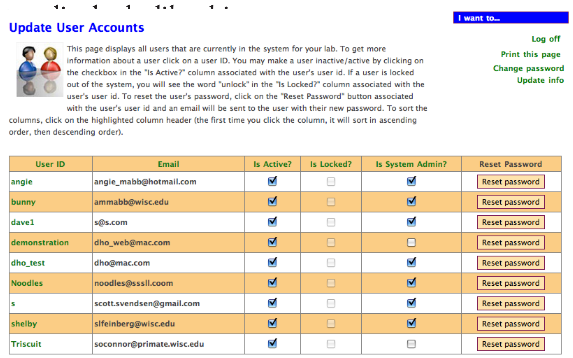
After an order is placed, laboratories generally do not have any additional interaction with the order until it is fulfilled. Many laboratories have devised systems to note when products arrive and orders fulfilled, but often these systems are informal. The Lab Hound system provides a more useful and easy-to-use way to track order arrivals. The goal is to minimize interruptions to existing workflows while providing information that allows laboratories to easily visualize order status.

How does this work? When the order arrives in the laboratory, the person (or people) responsible for unpacking the item puts it away in the lab. Some products may need to remain frozen, while others are stable at room temperature. Certain items may be delivered to a particular worker's laboratory bench, while other items may be moved into 'common-use' areas. In the Bloodhound system, it doesn't matter where an item is put away as long as the location is noted. After putting the order in its proper place, the receiver simply logs in to the Bloodhound module, searches for the order, and annotates the order with its destination in the lab. Behind the scenes, the Bloodhound module takes this information and generates an automatic email alert to the person who requested the order. The location of the product and the time of arrival is indicated in the email. Additionally, ordering administrators can view a list of all requested and placed orders that have not arrived, allowing for a more thorough accounting for delayed and unresolved orders than is possible in less sophisticated systems.

Establishing User Roles

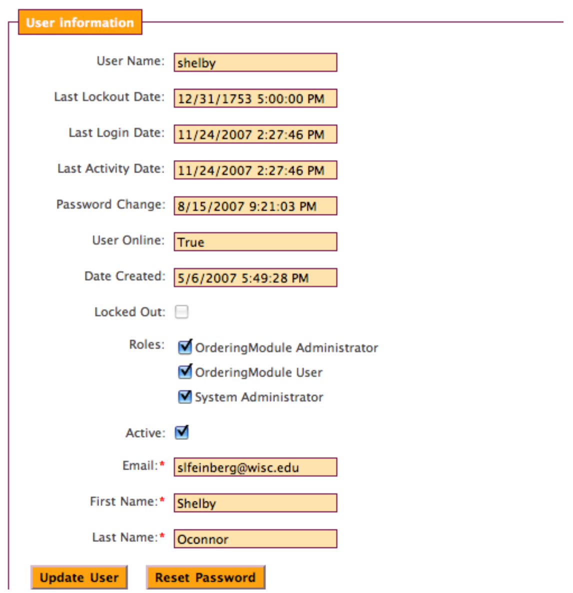
Now that the philosophy behind requesting, placing, and receiving orders has been described, the need for designating user roles should be apparent. The beginning of this chapter describes how to create users for every member of your laboratory. Now we will update these user records to include roles.

Navigate to Home > System Administration > Update Accounts when logged into the system as an administrator. You will be presented with a list of all the users in the system. From this window, you can deactivate users, lock users, designate additional users as system administrators, or reset user passwords. The



User ID	Email	Is Active?	Is Locked?	Is System Admin?	Reset Password
angie	angie_mabb@hotmail.com	☑	☐	☑	Reset password
bunny	ammabb@wisc.edu	☑	☐	☑	Reset password
dave1	s@s.com	☑	☐	☑	Reset password
demonstration	dho_web@mac.com	☑	☐	☐	Reset password
dho_test	dho@mac.com	☑	☐	☑	Reset password
Noodles	noodles@sssll.coom	☑	☐	☑	Reset password
s	scott.svendsen@gmail.com	☑	☐	☑	Reset password
shelby	slfeinberg@wisc.edu	☑	☐	☑	Reset password
Triscuit	soconnor@primate.wisc.edu	☑	☐	☐	Reset password

Centralizing user management allows administrators to rapidly manage system users. Note that it is impossible to completely delete users from the system. Why is this? Imagine that graduate student Jane finishes her PhD and moves to another lab for a postdoctoral fellowship. Second year graduate student Sarah will be following up with Jane's unfinished projects. If we deleted Jane from the system, Jane's order history would disappear as well, meaning that Sarah would have a more difficult time reordering the same supplies that Jane used. Instead, the system



administrator can simply inactivate Jane's record so that her user can no longer use the system, view order records, or edit order data. Because user records are permanent, we encourage Lab Hound users to select distinctive user names. For example, Lab Hound co-founder Dave O'Connor's user name should be oconnor or david.oconnor instead of 'dave', as other users in his lab also named 'dave' could find this confusing.

Clicking on an individual user within the list of all users will bring up a detailed report for that user. The roles for the user can be updated from this view. Information about the user's Lab Hound activity is also provided to simplify user management.

5 Creating and Managing Grants

In this chapter you will learn how to add and manage funding sources in the Bloodhound module. Though the Bloodhound module is not designed to function as a full-fledged accounting solution, it does provide rudimentary tools for supplies budgeting. Individual grants, along with their supplies budgets, are entered into Lab Hound by system administrators. Each placed order is linked to a specific grant account. The system keeps a running tally of total purchases against each grant, allowing laboratories to track spending patterns. Additionally, the system will alert users when placing an order on a grant with insufficient funds, preventing grant overspending.

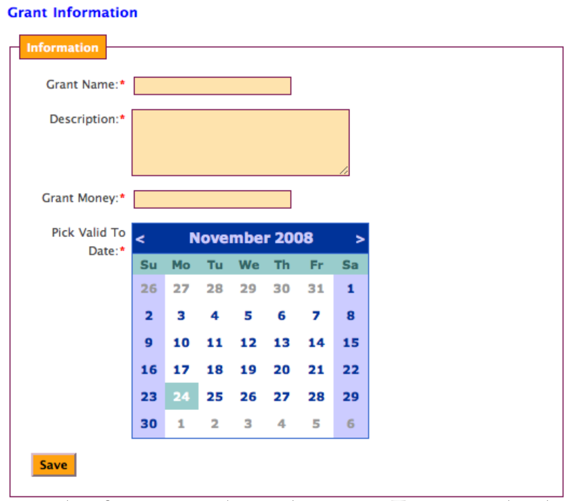
Creating Grant Accounts

When logged in as a ordering module administrator, navigate to Home > Bloodhound Ordering Module > Create Grant.

In order to create a grant, several pieces of information must be provided to the Lab Hound system.

First, the grant name must be entered. Different labs use different conventions for naming grants. Lab Hound is designed to accommodate many different types of grant names. 'KG65', '001', 'NIHR0187645', and 'SignalingR01' are all examples of valid grant names. Grant names will always be chosen from a pull-down menu when placing orders, so using long, descriptive grant names will not increase order processing time.

The grant description allows users to provide addi-



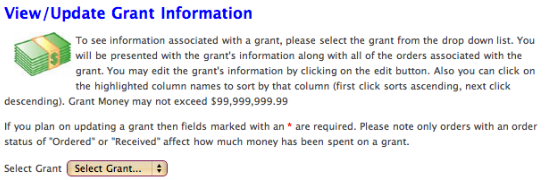
tional information about the grant. For example, the complete name of the proposal could be entered into the description field if an abbreviated name is used in the 'Grant Name' field.

The 'Grant Money' box establishes the starting balance for the grant. This is not necessarily the entire budget for the grant, but rather the budget for the supplies purchases that will be managed within the Bloodhound module. As items are ordered, the total price will be debited from the 'Grant Money' budget, providing a running total of available funds.

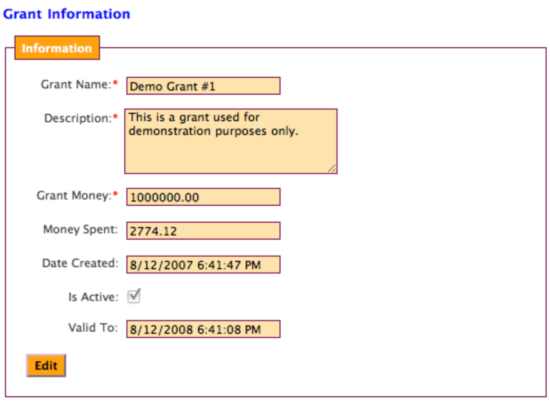
Lastly, the date of grant expiration needs to be set using the graphical calendar. Once a grants expiration date is reached, new orders will no longer be accepted.

Updating Grant Accounts

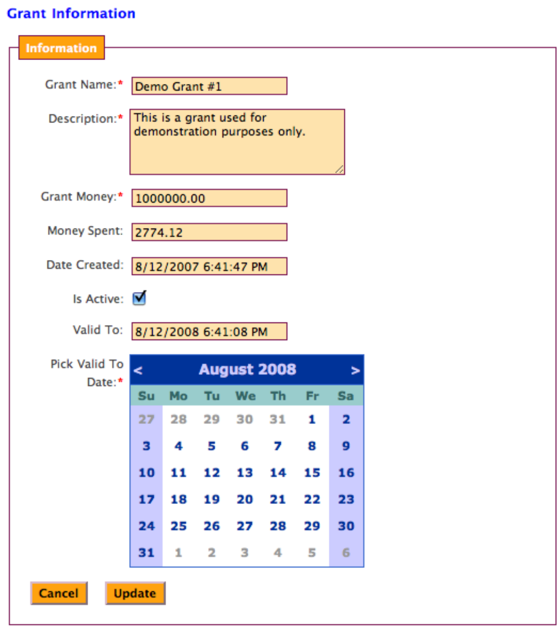
Of course, the information associated with particular grants can be changed by ordering module administrators at any time. Navigating to Home > Bloodhound Ordering Module > Grant Information displays the following screen:



Use the pull-down menu to select the grant you want to edit. Details about the grant will be shown:



Note that the amount of money spent on the grant is shown. If any of the details (excluding money spent, which cannot be directly edited without modifying individual orders) need to be modified, clicking the 'edit' button will bring up a page where the details can be edited. The 'edit' page looks like this:



After making any necessary modifications, selecting 'update' will finalize your update.

Grant Purchase Summaries

The Grant Information page also displays a concise summary of all products ordered on a particular grant. This display can be very useful for summarizing a grant's spending history. In addition, the results can be exported as an XML file that can be downloaded and opened in Microsoft Excel where more advanced financial and charting options are available.

XML import into Excel is only supported in Office 2003 and Office 2007 on Windows clients. Limitations in OSX versions of Excel prevent proper importing of XML data. The XML generated by Lab Hound is standards compliant and as such can also be processed by other XML editing programs.

The concise summary looks like this:

Orders associated with grant: 11 order(s)

Order ID	Vendor	Product Name	Product Description	Cost	Requested Date	Requested By	Order Status
28	Promega	BenchTop 100 bp DNA Ladder	BenchTop 100 bp DNA Ladder	198.00	8/13/2007 8:31:06 PM	Shelby Oconnor	Received
27	ISC Bioexpress	SnapStrip 8-Strip 0.2mL PCR Tubes	SnapStrip 8-Strip 0.2mL PCR Tubes with Individual Attached Caps	112.00	8/13/2007 8:01:24 PM	Shelby Oconnor	Cancelled
26	ISC Bioexpress	Snapstrip 8-strip tubes	SnapStrip 8-Strip 0.2mL PCR Tubes with Individual Attached Caps	112.00	8/13/2007 7:59:17 PM	Shelby Oconnor	Requested
25	Invitrogen	ChargeSwitch PCR Clean-Up	ChargeSwitch PCR Clean-Up	2790.00	8/13/2007 7:45:47 PM	Shelby Oconnor	Requested
23	Miltenyi Biotech	CD8+ T cell isolation kit	CD8+ T cell isolation kit	620.00	8/13/2007 7:42:50 PM	Shelby Oconnor	Requested
21	Miltenyi Biotech	LD columns	LD columns	650.00	8/13/2007 7:38:45 PM	Shelby Oconnor	Received
18	Invitrogen	ChargeSwitch PCR Clean-Up	ChargeSwitch PCR Clean-Up	1395.00	8/13/2007 7:32:02 PM	Shelby Oconnor	Requested
17	Invitrogen	Superscript III First-Strand Synthesis System for	Superscript III First-Strand Synthesis system for RT-PCR	598.00	8/13/2007 7:30:20 PM	Shelby Oconnor	Requested
16	Fisher Scientific	Kimwipes	11 x 22 kimwipes	8.34	8/13/2007 7:21:17 PM	Angela Smith	Received
13	Fisher Scientific	Agaraose test2	500g molecular biology grade agarose	633.89	8/13/2007 7:05:17 PM	Shelby Oconnor	Received
11	Fisher Scientific	xx	500g molecular biology grade agarose	633.89	8/12/2007 8:41:09 PM	Scott Svendsen	Received

Export Results to XML

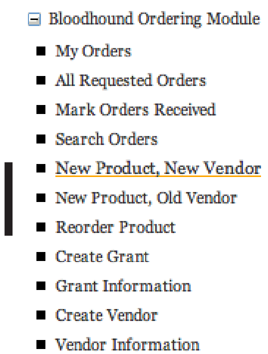
Clicking on the order number in the leftmost column retrieves details about that particular order.

6 Creating and Managing Orders

In this chapter you will learn how to request orders, place orders, and mark orders as received. These topics were introduced earlier in the discussion of user roles.

Requesting an Order

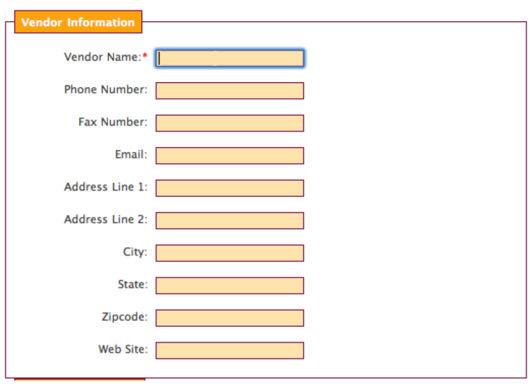
Order requests are at the center of the Bloodhound module. The process of requesting orders is designed to be as simple as possible, making it easy and quick for users to request products. There are three general categories of order requests. In the first, a user places an order for a new product from a vendor that hasn't been used previously. When the vendor's contact information is already in the system, the user only has to enter information about the product being ordered. The process is even simpler if your lab is reordering a product - in a few quick keystrokes you can request a reorder and get on with your experiments. All three types of order requests can be accessed directly from the left sidebar as shown below:



Requesting a New Product from a New Vendor

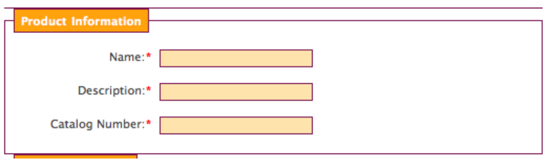
We will go through the information that needs to be associated with each order request. When requesting a new product from a vendor that is not already in your laboratory's Bloodhound module, information on the vendor, product, and order must be entered. Below we will discuss the information that needs to be associated with each order.

Vendor Information



Every order request is associated with a vendor - the person or company who is selling you the product. Complete vendor contact information can usually be found on product catalogs or company websites. Many companies accept orders via phone, fax, email and, in some cases, over the internet. Adding complete vendor details enables the person placing the order to use whichever method is most convenient. In our experience this can vary from company to company. Some vendors are very diligent about checking for orders placed via fax, while others seem to respond most effectively to orders placed over the phone. For this reason, adding complete vendor details can be very helpful. Vendor name, however, is the only field that is absolutely required (as indicated with the *).

Item Information

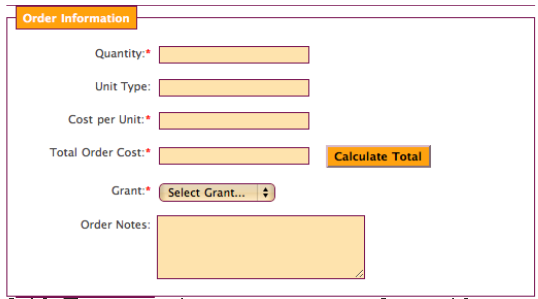


Next, product information must be entered. The name of the item as it appears in a product catalog should be entered in the 'name' field. The description can be used to provide more information about the product. This could be a paragraph of descriptive text about the product from the vendor's website or a lab-specific description of how the product will be used. Catalog numbers provide the most definitive way to ensure that the right product is ordered. All three fields of information in this box are mandatory.

Lab-Specific Information

There are two types of lab-specific information that can be associated with an order, 'order information' and 'shipping information.'

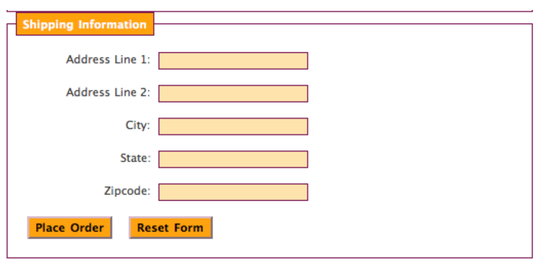
The order information pane must be completed for all orders. The quantity field describes how many of the item will be ordered. 'Unit type' is a flexible



field. For example, pipet tips are often sold in cases of 960 tips (10 boxes). The 'unit type' in this instance could be entered as '1 case of 10 boxes containing 960 tips', preventing staff from inadvertently ordering 10 cases of tips when 10 boxes are meant. The expected cost of an order is calculated by multiplying the order quantity by the cost per unit. Prior to submitting an order, the provisional total order cost can be recalculated in real-time by clicking the 'calculate total' button.

The grant pull-down menu is populated with all of the active grants available for your lab (see Chapter 5). Each order must be associated with one grant.

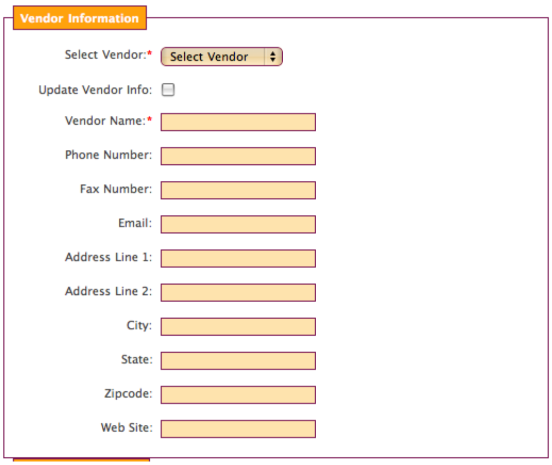
The 'Order Notes' area allows users to add additional notes, requests, or comments about an order. For example, it could be used to indicate that an order is urgently needed (or, perhaps, that it is not time sensitive and a more economical shipping option could be used).



The 'Shipping Information' pane describes where the product should be delivered. Small labs that have only one shipping destination may not need to add shipping information for every order, however, it can be very useful for larger labs that are distributed in multiple locations.

Requesting a New Product from an Existing Vendor

Non-scientific studies show that most life sciences labs order their products from fewer than 50 vendors. The good news is that after you enter vendor information into the Bloodhound module, it can be easily reused when placing subsequent orders by selecting Home > Bloodhound Ordering Module > New Product, Old Vendor from the sidebar. This interface that is very similar to the 'New Product, New Vendor' interface - with one important exception.

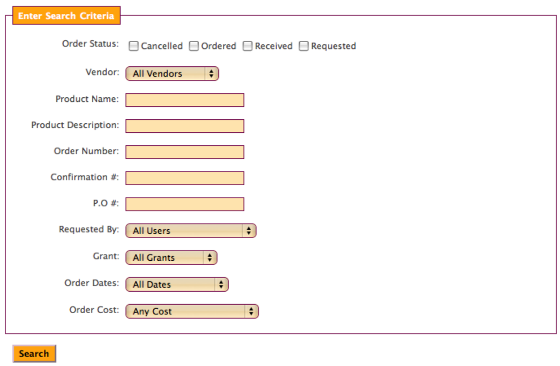


Note the 'select vendor' pulldown menu. This menu contains a list of every vendor in your laboratory's Bloodhound module. Selecting a vendor will automatically populate the Vendor Information pane. Once the vendor is selected, Item Information and Lab-Specific Information should be entered as described above.

Reorder a Product

Many consumable products used in a laboratory are ordered regularly. For example, a lab that isolates DNA from plants may have a single preferred commerical kit that is used for all DNA isolations. Maintaining adequate supplies of these products has always been challenging. Almost everyone who works in a lab can share the frustration of having to postpone an experiment because a simple reagent is unavailable.

The ability to rapidly reorder commonly used products is a key feature of the Bloodhound module. To reorder a product, select Home > Bloodhound Ordering Module > Reorder Product. When you click this link on the sidebar, you are presented with a search interface as shown below:



Using any of these criteria, you can identify the product to reorder. The search results are presented in tabular form, allowing you to select from among the orders that match your search criteria.

Orders Found: 14 order(s)

Order ID	Vendor	Product Name	Product Description	Cost	Requested On	Requested By	Order Status	Grant	Confirmation Number	P.O. Number
29	Invitrogen	ChargeSwitch PCR Clean-Up	ChargeSwitch PCR Clean-Up	1395.00	8/15/2007 8:57:37 PM	Shelby Oconnor	Ordered	Grant demo #2		
28	Promega	BenchTop 100 bp DNA Ladder	BenchTop 100 bp DNA Ladder	198.00	8/13/2007 8:31:06 PM	Shelby Oconnor	Received	Demo Grant #1		
27	ISC Bioexpress	SnapStrip 8-Strip 0.2mL PCR Tubes	SnapStrip 8-Strip 0.2mL PCR Tubes with Individual Attached Caps	112.00	8/13/2007 8:01:24 PM	Shelby Oconnor	Cancelled	Demo Grant #1		

Clicking on the **Product Name** will bring up a re-order dialog that will have the Vendor Information, Item Information, and select Lab-Specific Information (previous quantity ordered, order type, and cost) already filled. You only need to adjust the quantity (if necessary), select the grant to be charged against, and add order notes (again, if necessary). The entire process of requesting a product reorder can usually be completed in less than a minute.

Before reordering a product, it is sometimes useful to review previous order details. Clicking any '**Order ID**' from the search results table will display information about the previous order.

Placing an Order

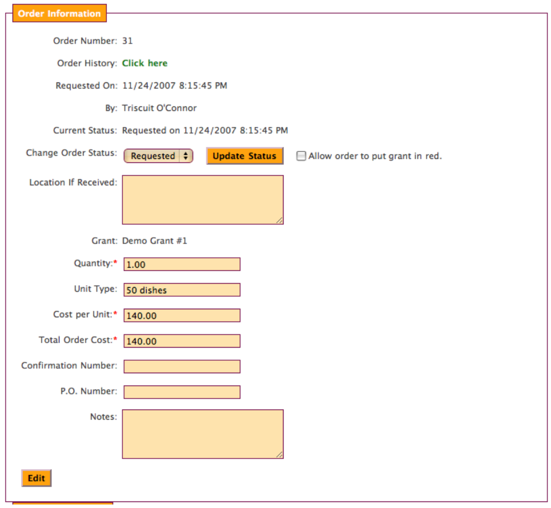
Once an order request is finalized, the next step is to place the order with the vendor. This can be accomplished by any user who has been granted OrderingModule Administrator privileges. These users may be designated ordering administrators within your lab, or, in some cases, a departmental ordering administrator.

For authorized users, placing an order is very straightforward. In the sidebar, select Bloodhound Ordering Module > All Requested Orders. A listing of all the order requests that have not been processed will be displayed:

Orders Found: 11 order(s)

Order ID	Vendor	Product Name	Product Description	Cost	Requested On	Requested By	Order Status	Current Status Date
31	BD Biosciences	96-well Microplate, nontreated polystyrene, U-bott	96 well dish	140.00	11/24/2007 8:15:45 PM	Triscuit O'Connor	Requested	11/24/2007 8:15:45 PM
26	ISC Bioexpress	Snapstrip 8-strip tubes	SnapStrip 8-Strip 0.2mL PCR Tubes with Individual Attached Caps	112.00	8/13/2007 7:59:17 PM	Shelby Oconnor	Requested	8/13/2007 7:59:17 PM
25	Invitrogen	ChargeSwitch PCR Clean-Up	ChargeSwitch PCR Clean-Up	2790.00	8/13/2007 7:45:47 PM	Shelby Oconnor	Requested	8/15/2007 9:10:34 PM

Selecting the 'Order ID' link for the order will bring up a detailed view of the order. The 'Order Information' needs to be updated when an order is placed.



First, the 'Change Order Status' pulldown must be updated to 'Ordered'. Next, any confirmation numbers or P.O. numbers provided by the vendor can be entered. OrderingModule Administrators also have the ability to add additional notes and comments to the order. When the status of an order is changed to 'Ordered', the user who placed the order is notified automatically by email.

The difference between a note and a comment may at first seem subtle. One way to conceptualize the distinction is that comments are sophisticated notes. Multiple comments can be assigned to any order, and comments can include linked PDF, RTF, Word, Powerpoint, and Excel documents) that might be useful in the future. For example, kit protocols, MDS sheets, scanned packaging inserts, or in-house lab protocols can all be added to comments on an order.

Cancelling an Order

The 'Change Order Status' pulldown can also be used to cancel an order. Why might this be necessary? Consider that the Ordering Administrator realizes that an order for the same product was placed by a different user earlier in the day. Or that the product is too expensive for the laboratory to purchase. When an order is cancelled, the original requestor receives an email notification.

Take a Deep Breath

After the order is communicated to the vendor (or to a representative who contacts the vendor on your behalf beyond the scope of the Bloodhound module), there is little to do but wait. When the product arrives in the laboratory, the final step in the ordering process is to mark it as received.

Marking an Order as Received

To initiate the process of marking an order as received, select Bloodhound Ordering Module > Mark Orders Received from the sidebar. A table listing all of the orders not yet received is displayed. An example is shown below:

Orders Waiting On Delivery: 2 order(s) Check/UnCheck All Mark As Received Reset

Order ID	Vendor	Product Name	Description	Requested By	Received?	Received Location	
24	BD Biosciences	96-well Microplate, nontreated polystyrene, U-bott	96 well dish	Angela Smith			Copy To All Checked
29	Invitrogen	ChargeSwitch PCR Clean-Up	ChargeSwitch PCR Clean-Up	Shelby Oconnor			Copy To All Checked

To mark a product as received, simply check the 'received' checkbox and indicate where the product is stored. Note that if many products are being put away at the same time, the 'copy to all checked' option can be used to minimize manual data entry. When the checkboxes and locations for all received products have been entered, clicking the 'mark as received' button finishes the ordering process.

Behind the scenes, clicking the 'mark as received' button will automatically send an email alert to the original requestor, providing instant notification of product arrival.