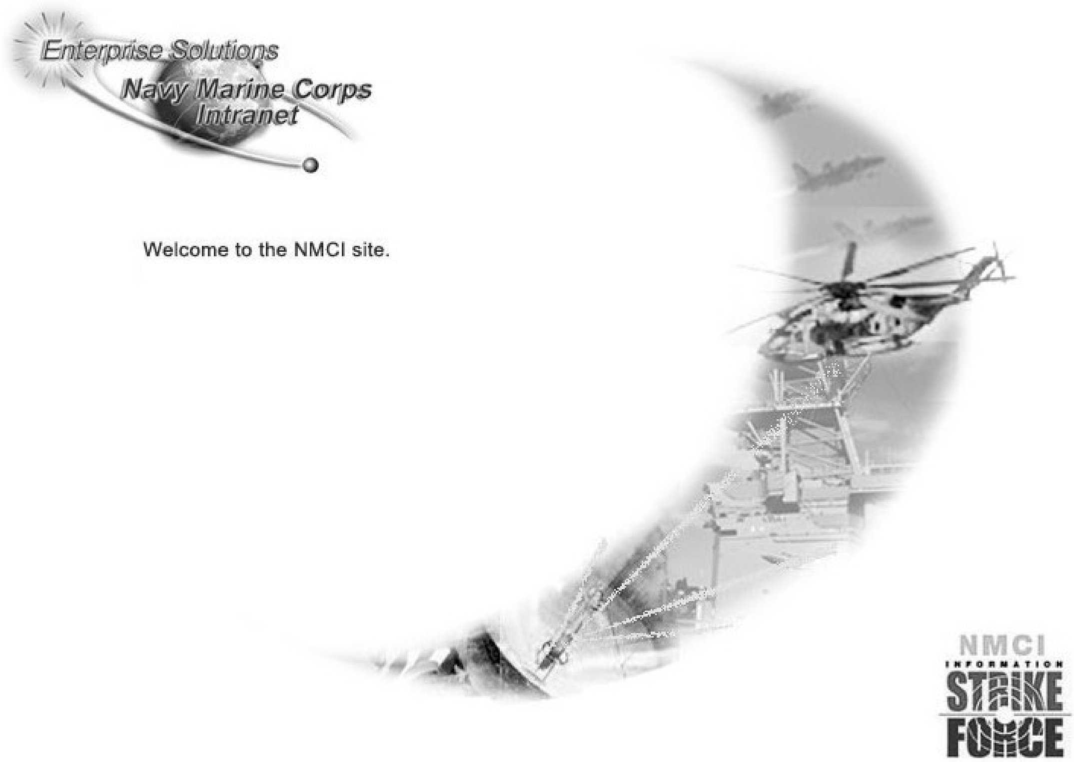


# NMCI Users Guide

July 18, 2001

Version 1.1

# ***Revision History***

| Document Version Number | Revision Date | Revision Page Number(s) | Reason for Revisions | Revisions Completed By |
|---|---|---|---|---|
| Version 1.1 | 07/25/2001 | 66 | New document | Allen Del Gaizo |
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| | | | | |

# Table of Contents



# Section 1: Introduction

## Overview

Welcome to the Navy Marine Corps Intranet (NMCI) eMarketplace website. The NMCI website provides Information Strike Force clients the ability to lease information technology products and services. Clients are able to create, maintain and manage order requests up the command chain using state of the art e.commerce functionality, along with reporting, invoicing and order tracking features. The purpose of the site is to provide streamlined efficient processes to create and manage orders, reducing manual intervention, and centralizing the processes used to acquire NMCI products and services.

This document contains step-by-step instructions for every feature of the NMCI site. For information on a specific task please refer to the table of contents. If you are reviewing this document on-line simply click on the topic of interest and you will be forwarded to that location in the document.

"Notes:" are located throughout the document and are designed to draw special attention to a topic or task. Notes are in bold and should be reviewed.

Help icons are available throughout the site and are positioned in the upper right hand corner of a page. The help pages provide a detailed explanation of a task along with step-by-step instructions.

Text boxes, drop down lists and basic page aesthetics may vary depending on individual screen resolution settings. This guide maps to a setting of 1024 x 768. Please take care when following instructions if your screen resolution is not set to the above.

When the word "User" is used in this document it refers to an NMCI Login Id type of "User", not a generic User of the application.

The NMCI eMarketplace Website site is compatible with Internet Explorer version 4.0 or greater, and Netscape Communicator version 4.7 or greater.

Information described in this document is believed to be accurate and reliable, and much care has been taken in its preparation. However, no responsibility, financial or otherwise, is accepted for any consequences arising out of the use or misuse of this material.

# *Section 2: Logging On*

## Overview

Before you can access the NMCI website you are required to Logon. Your Login Id contains permissions that allow or disallow certain functionality within the application. Also, your Login Id is tied to specific Unit Identification Code (UIC) Ids. Login Ids are assigned to work groups based on those UIC Id assignments.

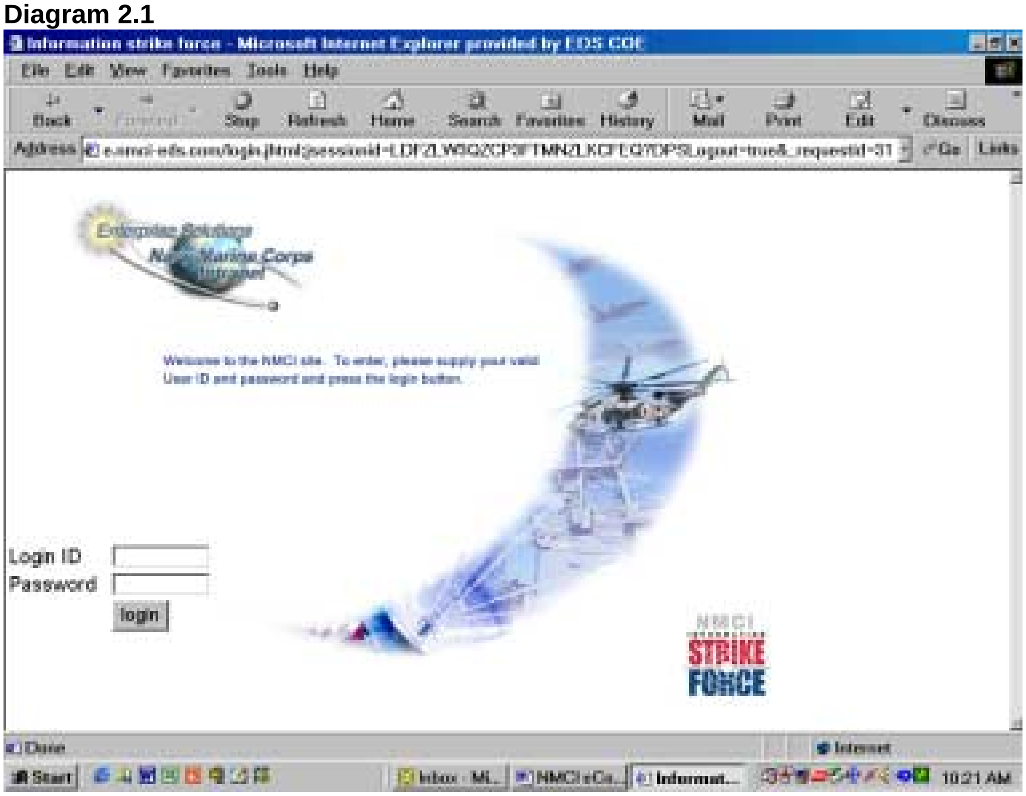
### *Logging On to the NMCI Website*

1. Enter the following URL in your browser Address drop down list, and hit the enter key:

   https://www.ecommerce.nmci-eds.com/login.jhtml

   You are transferred to the NMCI login page (diagram 2.1).

**Diagram 2.1**




2. Enter your assigned Login Id in the "LOGIN ID" text box.
3. Enter your password in the "PASSWORD" text box.
4. Click on "login". You are transferred to the NMCI "Home" page.

**Note:**
If you have problems logging on to the application please refer to "Help" section 14 of this document for the NMCI helpdesk contact number.

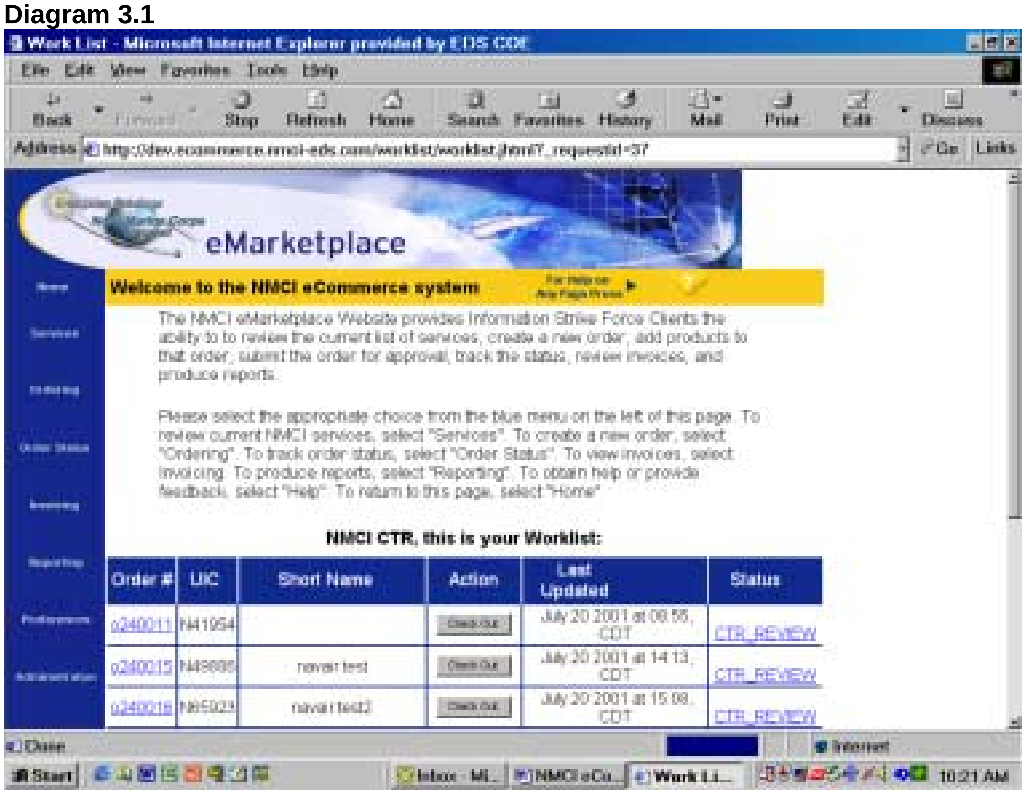
 

# *Section 3: Work List*

## Overview

The NMCI "Home" page contains your "Work List" (diagram 3.1).

**Diagram 3.1**




The work list contains order requests that are available for you to work on. If an order request is not in your work list you may not make changes to it. All the information about the order request is listed and available for review.

The work list is comprised of order requests that belong to a specific work group, which are a grouping of orders that are tied to specific UIC Ids, and Claimants. More than one login Id may have the same order requests in their work list.

The invoice work list contains invoices that are available for you to view, approve or reject. An invoice contains all the Contract Line Item Numbers (CLINs) for a specific UIC, and the monthly charges. If an invoice is not in your work list you may not make changes to it.

**Note:**
Customer Technical Representatives (CTR)s and CORs are the only login Ids that will have an invoice work list on the "Home" page.

If you have no order requests or invoices to display on the "Home" page a message appears in place of the lists indicating so.

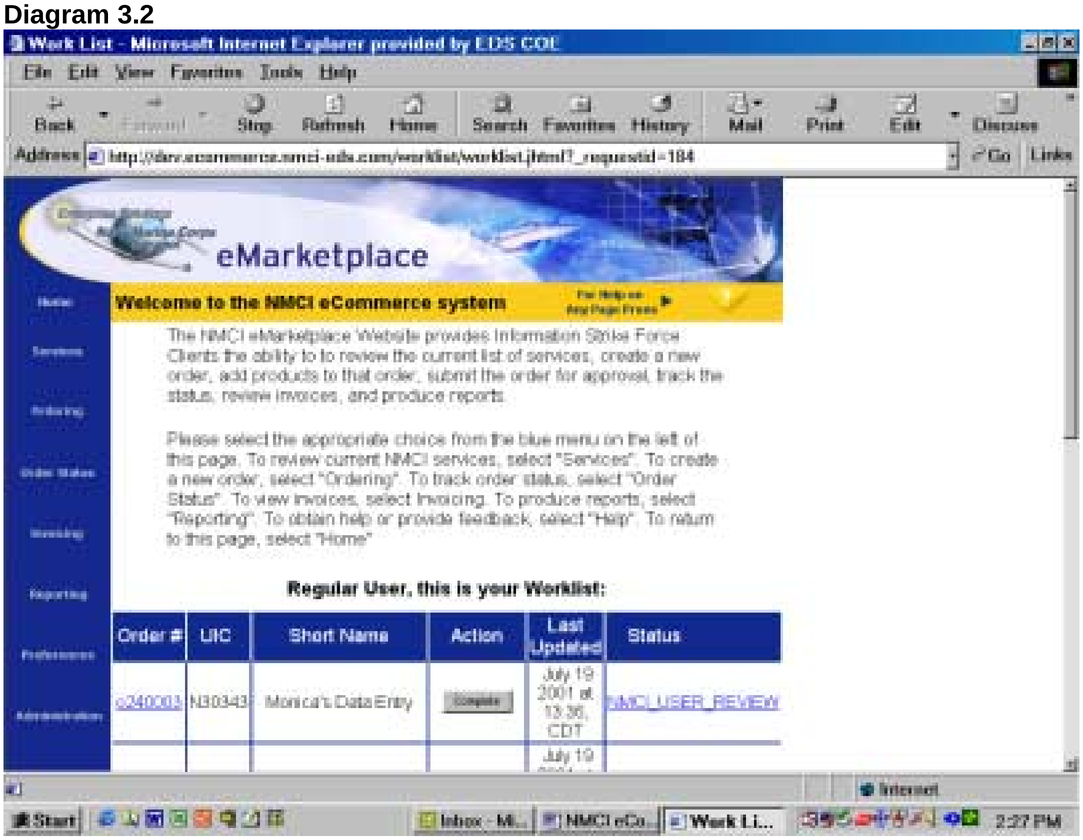
 

## *Work List*

### Viewing an Unapproved Order Request

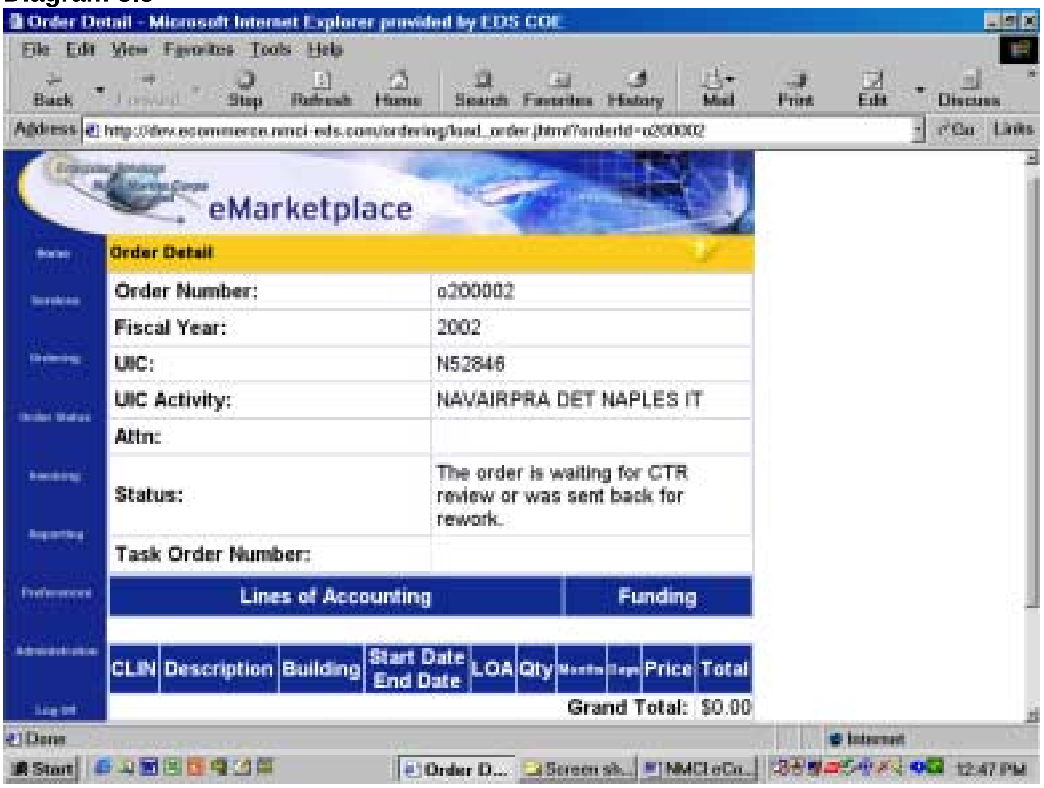
1. On the "Home" page work list (diagram 3.2) click on the order request number in the "Order #" column you wish to review. You are transferred to the "Order Detail" page. The order detail summary is read only.

**Diagram 3.2**



The top portion of the "Order Detail" page (diagram 3.3) lists the order request header information. The second section of the page contains all the CLINs and options (options) that have been added to the order.  All the information about the order request is listed including sub and grand totals.

**Diagram 3.3**




## Accessing an Unapproved Order Request

Only two Login Id types may add, change, and delete CLINS and options on unapproved orders.  They are CTR and User.  The processes used to access unapproved orders are different for a User than for a CTR.  The separate processes are explained in detail below.

## User Access to an Unapproved Order Request

1. If you have just logged on to the application the default page is the "Home" page.  To get to the "Home" page from another part of the application click on "Home" in the left hand toolbar.

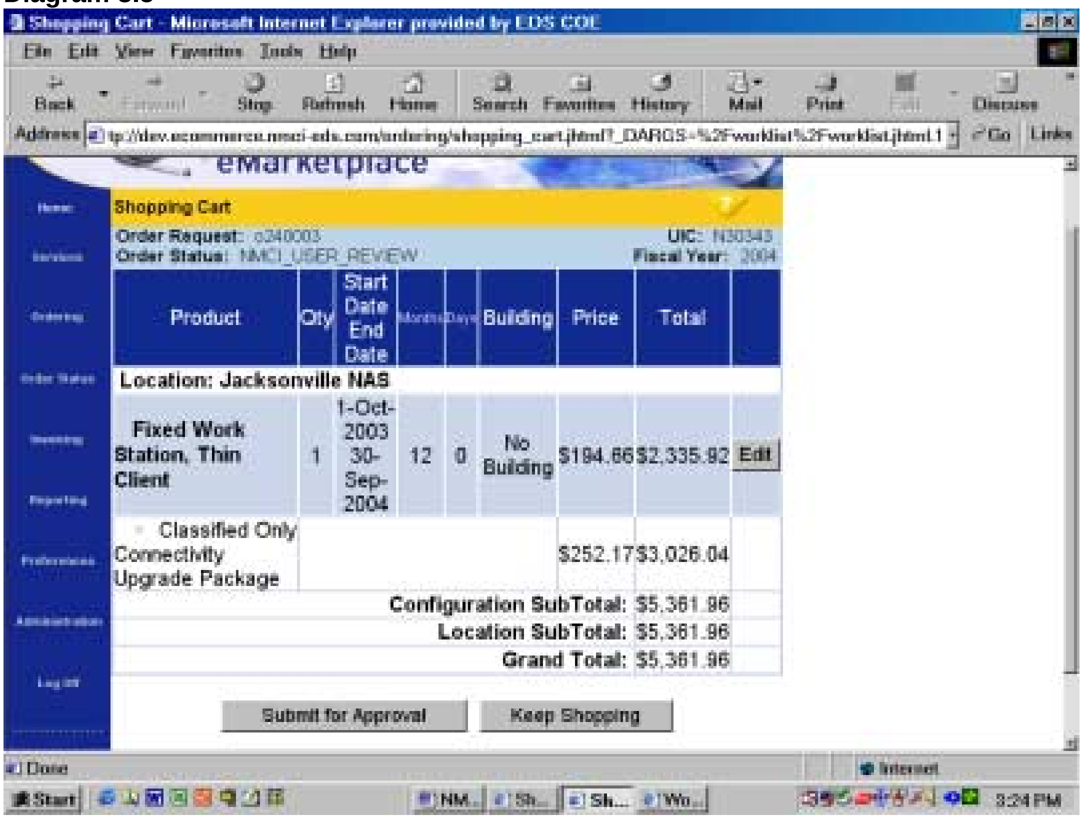
 

2. On the "Home" page work list (diagram 3.4) identify the order request number you would like to access in the "Order #" column. Click on "Complete" in the "Action" column.

**Diagram 3.4**

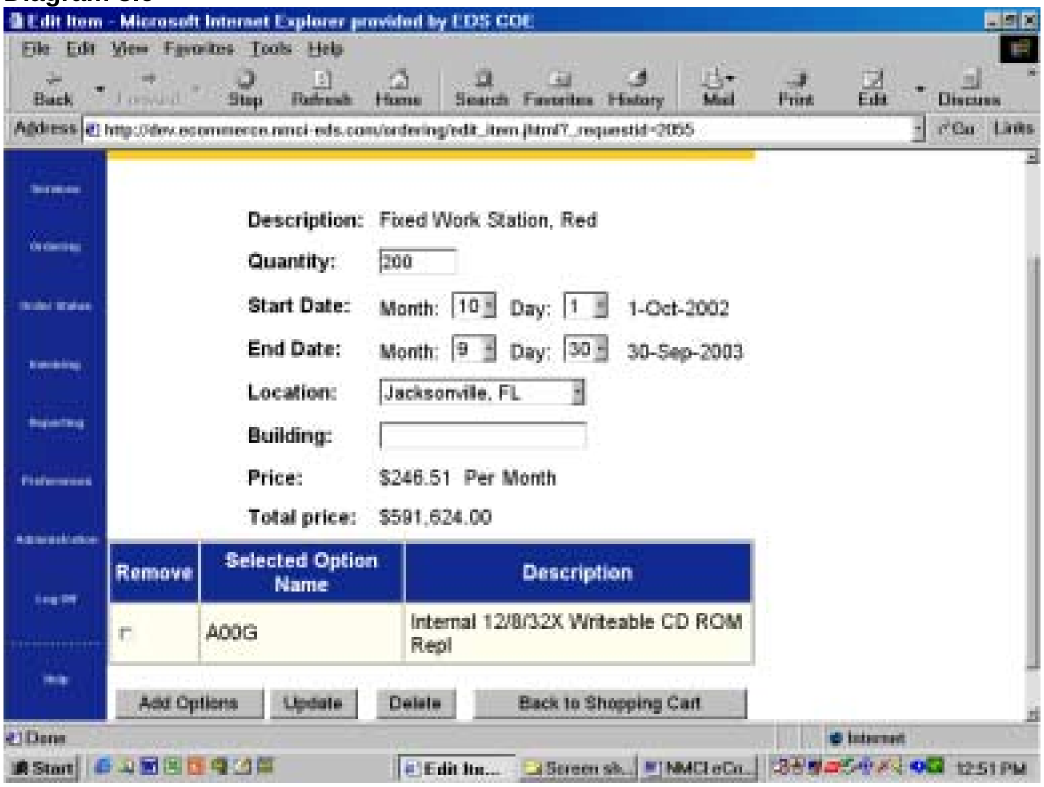
3. You are transferred to the "Shopping Cart" page (diagram 3.5). All the information about the order request is displayed on the page. To access a specific CLIN within the order request click on "Edit" in the right most column of that CLIN.

**Diagram 3.5**



4. You are transferred to the "Edit item" page (diagram 3.6).

**Diagram 3.6**




To return to the "Shopping Cart" page click on "Back to Shopping Cart" on the bottom of the page.

## CTR Access to an Unapproved Order Request

1. If you have just logged on to the application the default page is the "Home" page. To get to the "Home" page from another part of the application click on "Home" in the left hand toolbar.

2. On the "Home" page work list (diagram 3.7) identify the order request number you would like to access in the "Order #" column. Click on "Check Out" for that order request. Checking out the order request gives ownership of the order to you. No one else may update the order request when it is checked out by another login Id.

**Diagram 3.7**

3. You are transferred to the "working on Order#" page (diagram 3.8). There are two versions of this page.

   Diagram 3.8 shows the "working on order #" page were the order request was submitted to the CTR by a User.

**Diagram 3.8**

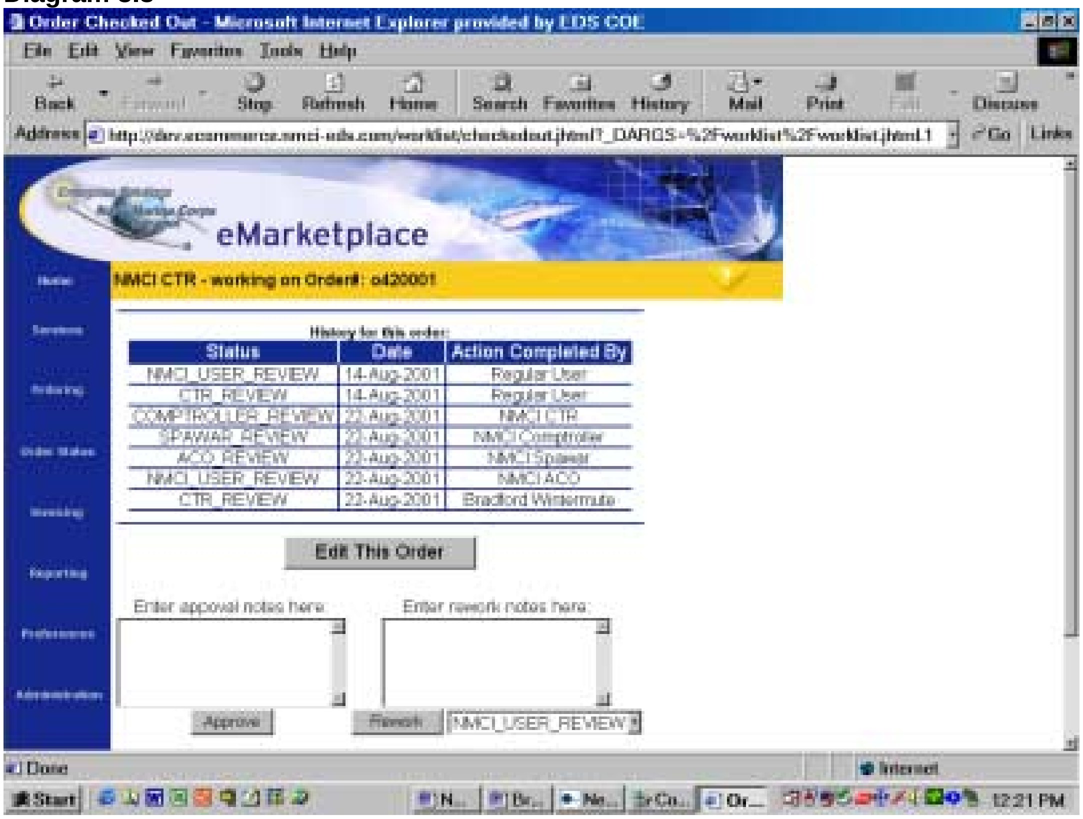
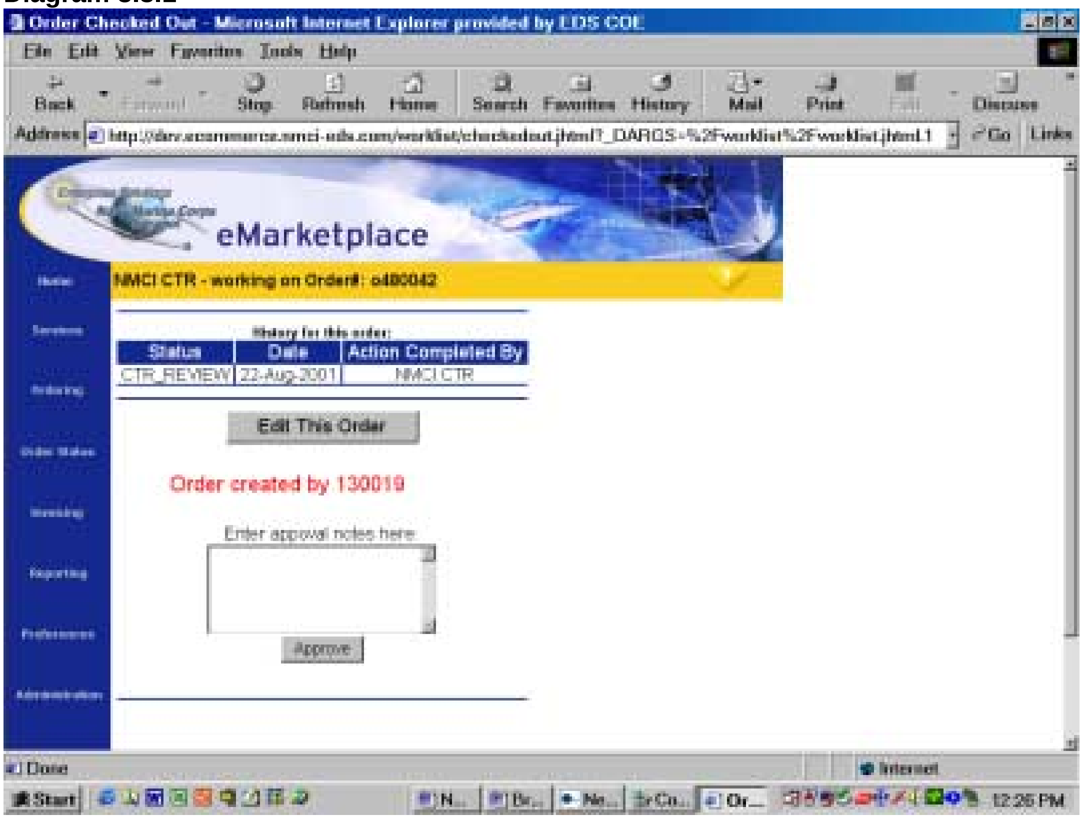


Diagram 3.8.1 shows the "working on order#" page where the order was originally created by the CTR. If the CTR created the order request they do not have the option to send the order back for rework.

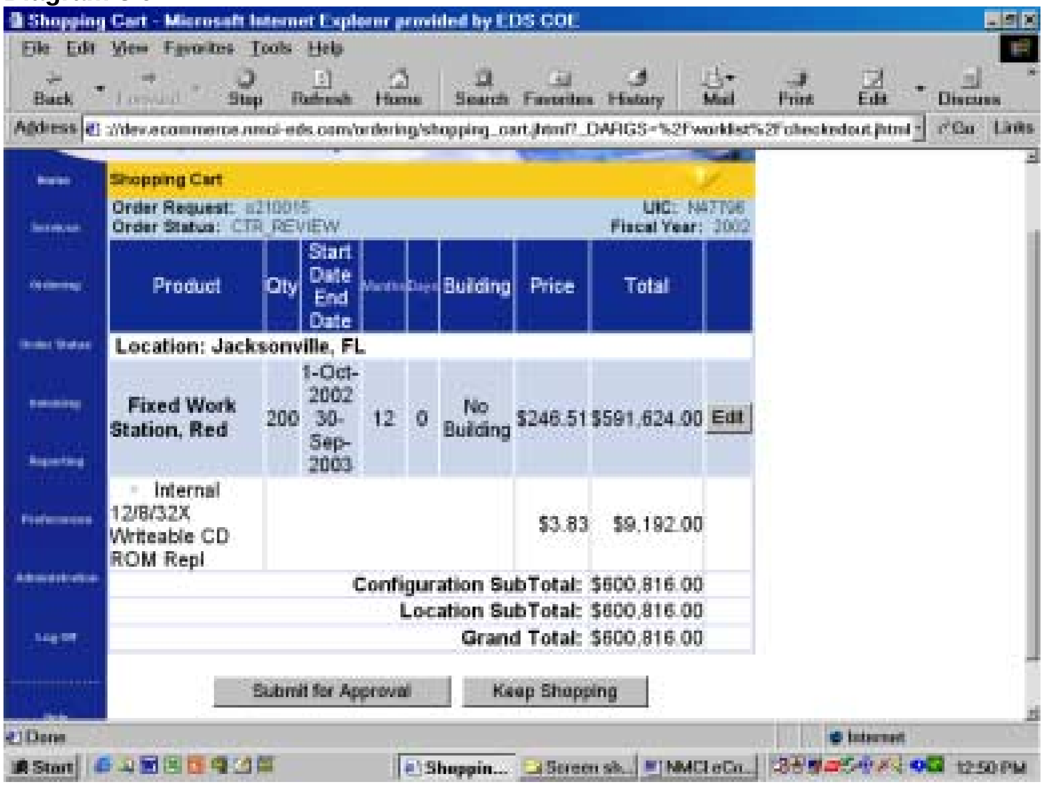
**Diagram 3.8.1**




Click on "Edit This Order".

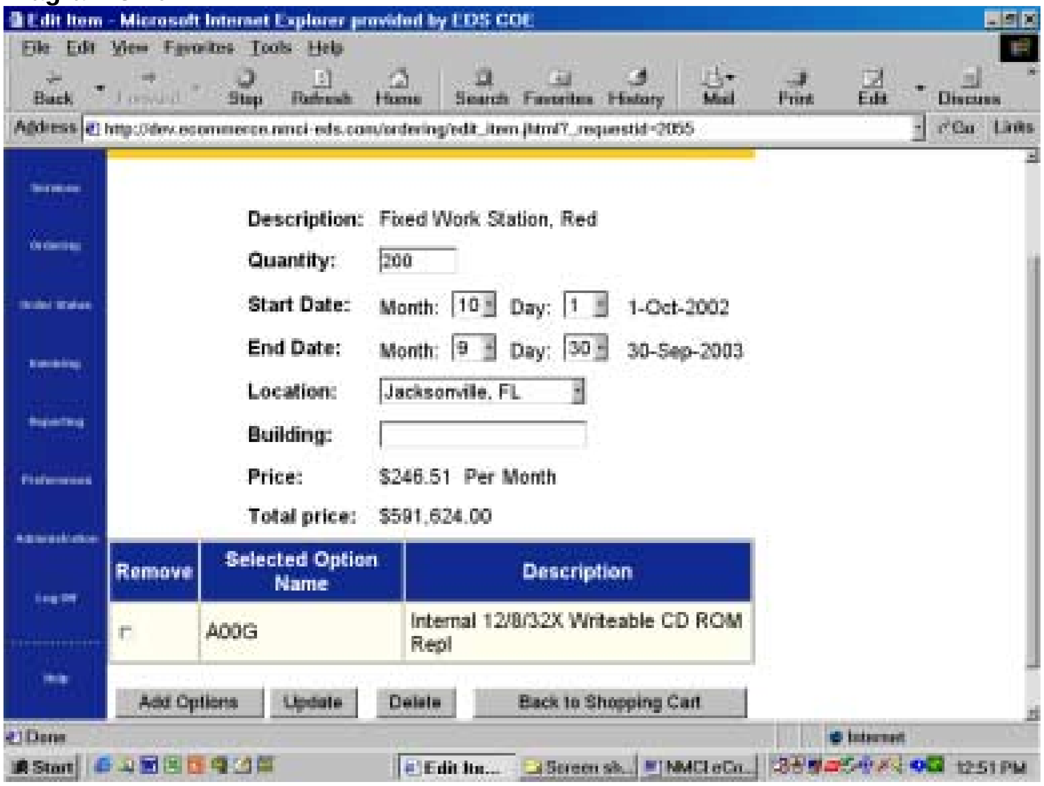
4. You are transferred to the "Shopping Cart" page (diagram 3.9). All the information about the order request is displayed on the page. To access a specific CLIN click on "Edit" in the right most column of that CLIN.

**Diagram 3.9**



5. You are transferred to the "Edit Item" page (diagram 3.10).

**Diagram 3.10**




To return to the "Shopping Cart" page without saving your changes click on "Back to Shopping Cart" on the bottom of the page.

## Changing the Order Request's Quantity, Dates, Location or Building

1. For a User Login Id follow the instructions "User Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

   For a CTR Login Id follow the instructions "CTR Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

2. Enter a new quantity in the "Quantity:" text box.
3. Select a new "Start Date Month" from the drop down list.
4. Select a new "Start Date Day" from the drop down list.
5. Select a new "End Date Month" from the drop down list.
6. Select a new "End Date Day" from the drop down list.

   **Note:**
   If the dates are changed the date to the right of the date drop down lists is not immediately updated.

7. Select a new "Location" from the drop down list.

8. Enter a new building number in the "Building:" text box.
9. Click on "Update" on the bottom of the page. The changes are applied and you are returned to the "Shopping Cart" page.

### Delete a CLIN and options from an Order Request

1. For a User Login Id follow the instructions "User Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

   For a CTR Login Id follow the instructions "CTR Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

2. On the "Edit Item" page click on "Delete" at the bottom of the page. The CLIN is removed along with all the options. You are returned to the "Shopping Cart" page. The CLIN and options have been removed from the shopping cart.

### Delete options from an Order Request

1. For a User Login Id follow the instructions "User Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

   For a CTR Login Id follow the instructions "CTR Access to an Unapproved Order Request" in section 3 of this document, and then continue at step 2.

2. On the "Edit Item" page select the options you wish to delete by clicking the "Remove" check box. More than one option may be deleted at a time.
3. Click on "Update" at the bottom of the page. You are returned to the "Shopping Cart" page. The options have been removed from the shopping cart.

### Viewing the Status History

1. If you have just logged on to the application the default page is the "Home" page. To get to the "Home" page from another part of the application click on "Home" in the left hand toolbar.
2. On the "Home" page work list identify the order number you would like to access in the "Order #" column. Click on the link in the "Status" column. You are transferred to the "Order Status History" page.
3. Click on "Back" to return to the "Home" page.

# Section 4: Services

## Overview

The Services pages provide you with detailed explanations of the CLINs and the associated options. The pages list all the information you need about a product or service in order to make an informed decision before adding it to your order request. The pages are for reference only. The categories are listed under the "Services" button on the left hand toolbar.

### *Viewing CLINs and options*

1. In the left hand toolbar click on "Services". The default services page is "Base Seats". All the associated CLINs are listed.
2. If "Base Seats" is not the desired product or service category, click on any one of the remaining product or service categories in the left hand toolbar.
3. To obtain specific information about a CLIN click on the CLIN number. On the "Service Description" page (diagram 4.1) the service description, price, and all available options are listed.

**Diagram 4.1**

4. If options exist they are listed towards the bottom of the page.  For information about an option click on the option number in the "Option" column.  The page lists the service description and price.

# Section 5: Ordering

## Overview

From the NMCI main ordering menu you can create a new order request, view or edit an existing order request, view an existing task order, or submit a request for a quote on an un-priced CLIN. The following options are available:

- Create New Order request
- View Existing Task Order or Order request
- Request Quote for Un-priced Services

### *Creating a New Order Request*

The "Order Request" page is where you enter the required information to create a new order request. You will be able to change the information at any time before it is submitted for approval.

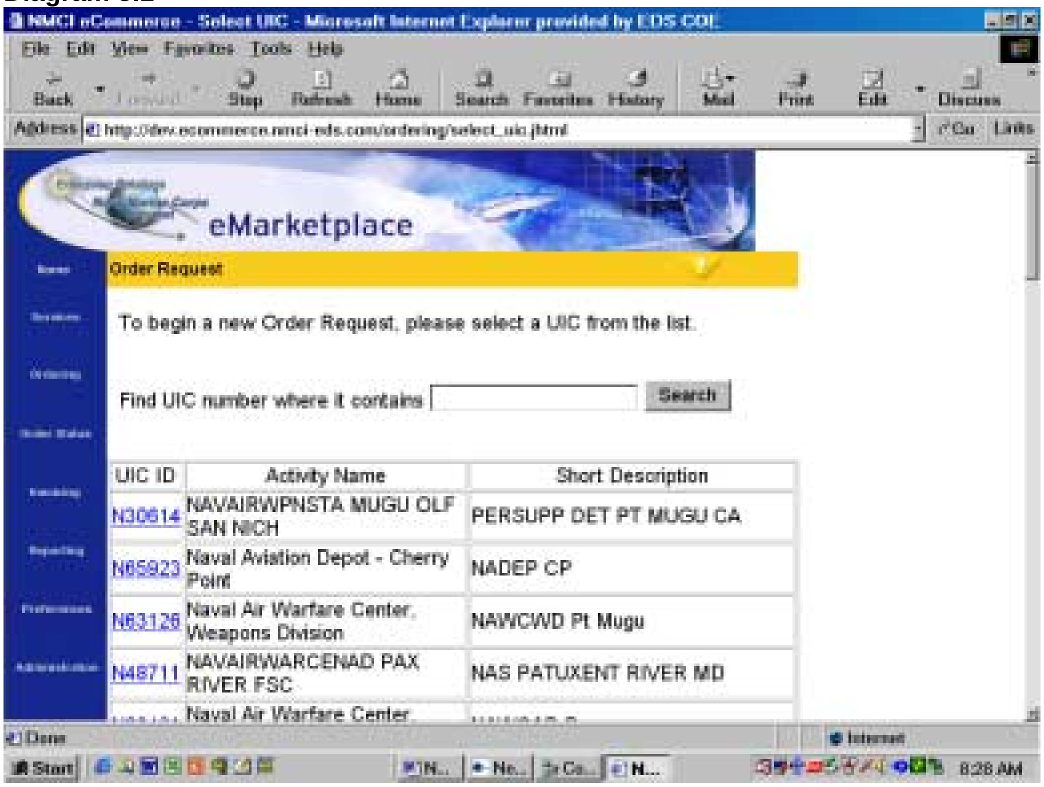
**Note:**
Any level in the command chain may create an order. Order requests are usually created at the User or CTR levels.

1. In the left hand toolbar click on "Ordering". You are transferred to the "Ordering Main Menu".

2. Click on "Create New Order Request". You are transferred to the "Order Request" page (diagram 5.1).

**Diagram 5.1**

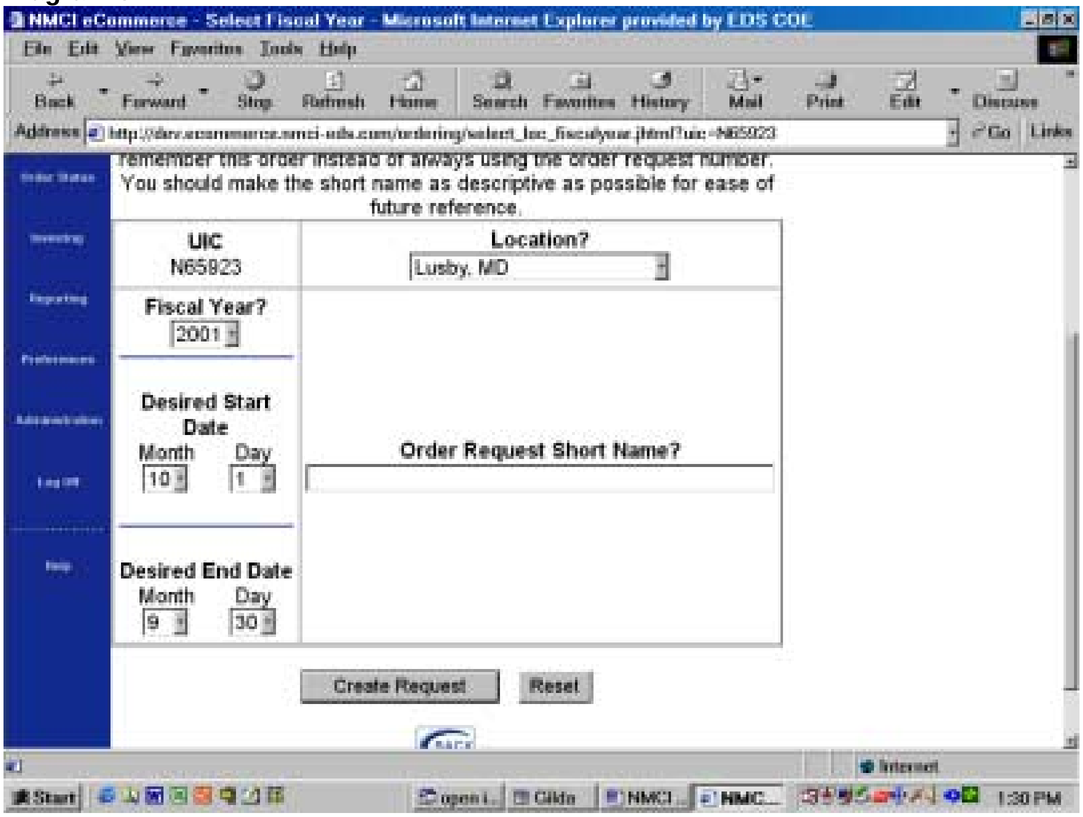



3. A UIC is required for a new order request. Upon entering the order request page all UICs associated with your work group are listed. To find and list a specific UIC enter your search criteria in the text box provided, and click on "Search".

4. Click on the desired UIC in the "UIC ID" column. You are transferred to a second "Order Request" page (diagram 5.2).

**Diagram 5.2**




5. Select a location from the "Location?" drop down list.
6. Select a fiscal year from the "Fiscal Year?" drop down list.
7. Select the "Desired Start Date Month" from the drop down list.
8. Select the "Desired Start Date Day" from the drop down list.
9. Select the "Desired End Date Month" from the drop down list.
10. Select the "Desired End Date Day" from the drop down list.

    **Note:**
    The system will return an error if an invalid date is selected (i.e. February 30), or an invalid date combination is selected (i.e. Start Date is after End Date).

11. Enter text that describes the order request in the "Order Request Short Name?" text box.

    **Note:**
    Clicking on "Reset" resets the entire page to the default values.
    Clicking on "Back" return you to the previous "Order Request" page.

12. Click on "Create Request".

13. You are transferred to the "Services, Base Seats" page. Here, you may begin adding CLINs and options to your order request.

## *Adding CLINs and options to an Order Request*

Once you have created or accessed an order request you can add CLINs and options.

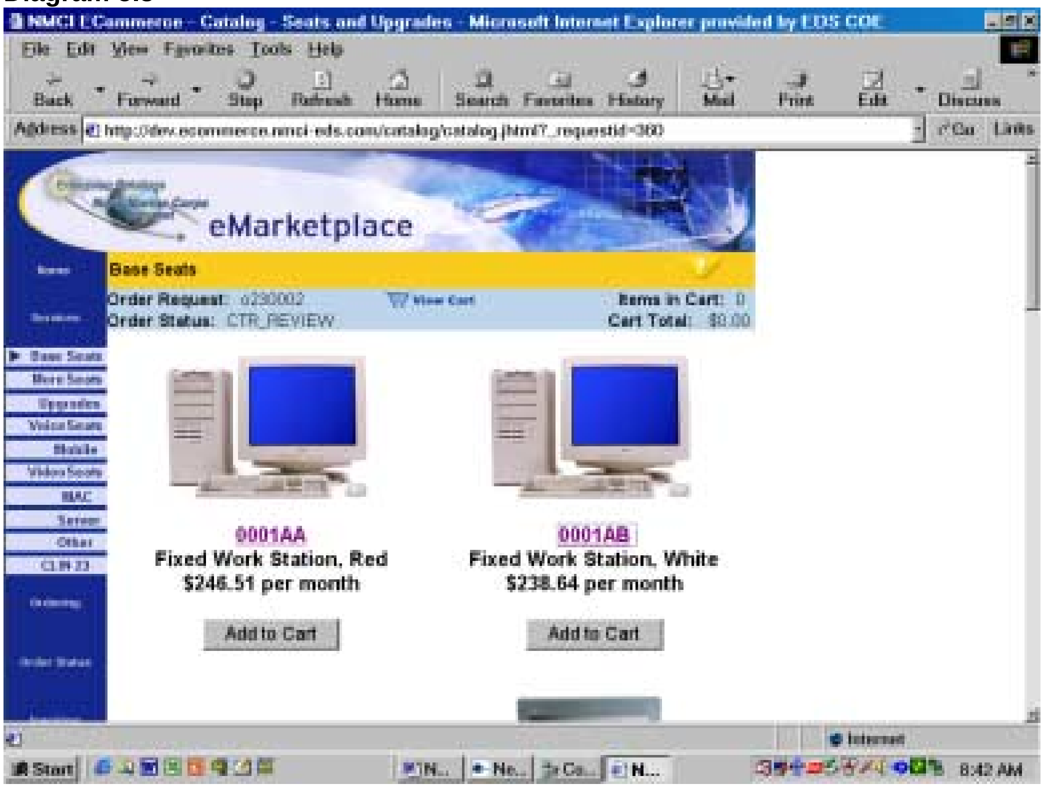
1. If you have just created an order request, are on the "Base Seats" page, and adding CLINs for the first time please skip to step 5.
2. If you are adding CLINs and options to an existing order request click on "Home" in the left hand toolbar. You are transferred to the "Home" page.
3. On the "Home" page work list identify the order request number you would like to work on in the "Order #" column.

    a. If you are a User click on "Complete". You are transferred to the "Shopping Cart" page.
    b. If you are a CTR do the following:
        i. Click on "Check Out". You are transferred to the "working on order#:" page.
        ii. Click on "Edit This Order". You are transferred to the "Shopping Cart" page.

4. Click on "Keep Shopping" on the bottom of the page. You are transferred to the "Base Seats" page (diagram 5.3).

**Diagram 5.3**

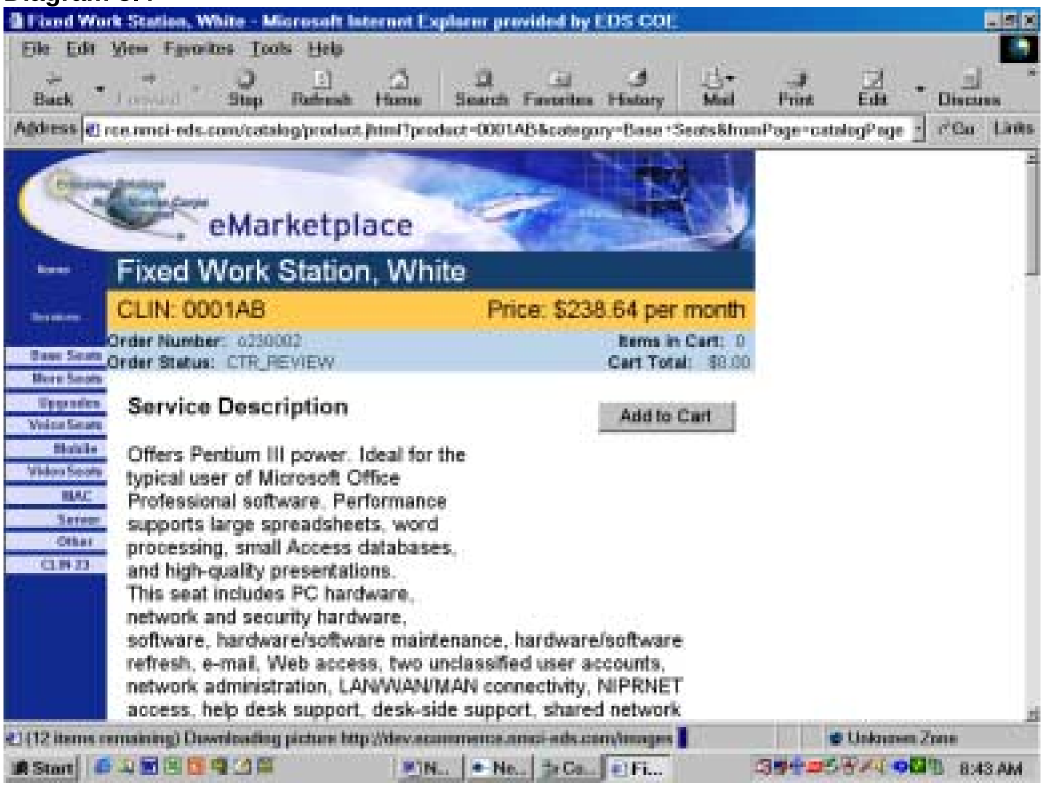



5. Identify the desired product or service category from the left hand toolbar under "Services". Click on the product or service category name. You are transferred to the corresponding category page.
6. If you prefer to add the CLIN to your order request without reviewing the CLIN information click on "Add to Cart".

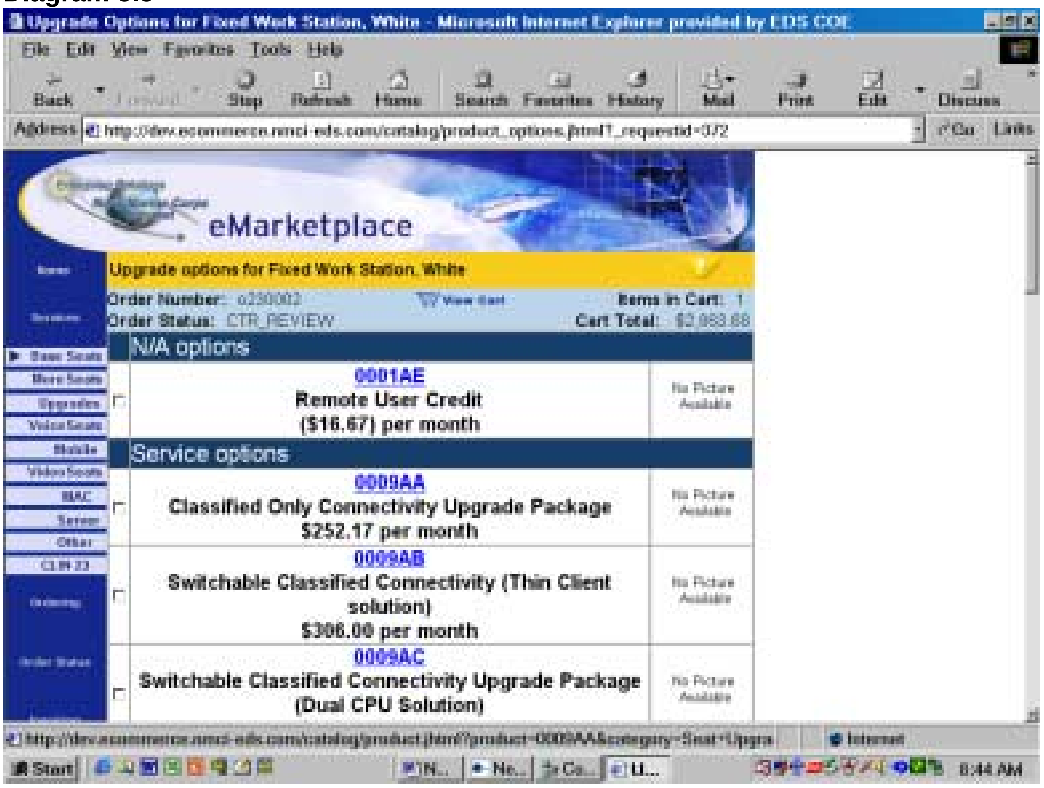
If you prefer to read about the CLIN before you add it to your order request click on the CLIN. You are transferred to the "Service Description" page (diagram 5.4). All the information about the CLIN is listed on the "Service Description" page. Click on "Add to Cart" to add the CLIN to your order request.

**Diagram 5.4**



7. If the CLIN does not have options you are transferred to the "Shopping Cart" page. If there are options you are first transferred to the "Upgrade options" page (diagram 5.5). The available options for the CLIN are listed.

**Diagram 5.5**




To add an option to your shopping cart do the following:

a. Click the check box in the first column for the option listed. More than one option may be ordered at a time.

**Note:**
Clicking on "Reset" at the bottom of the page clears the check boxes.

b. On the bottom of the page click on "Proceed". You are transferred to the "Shopping Cart" page. You entire order request is listed.

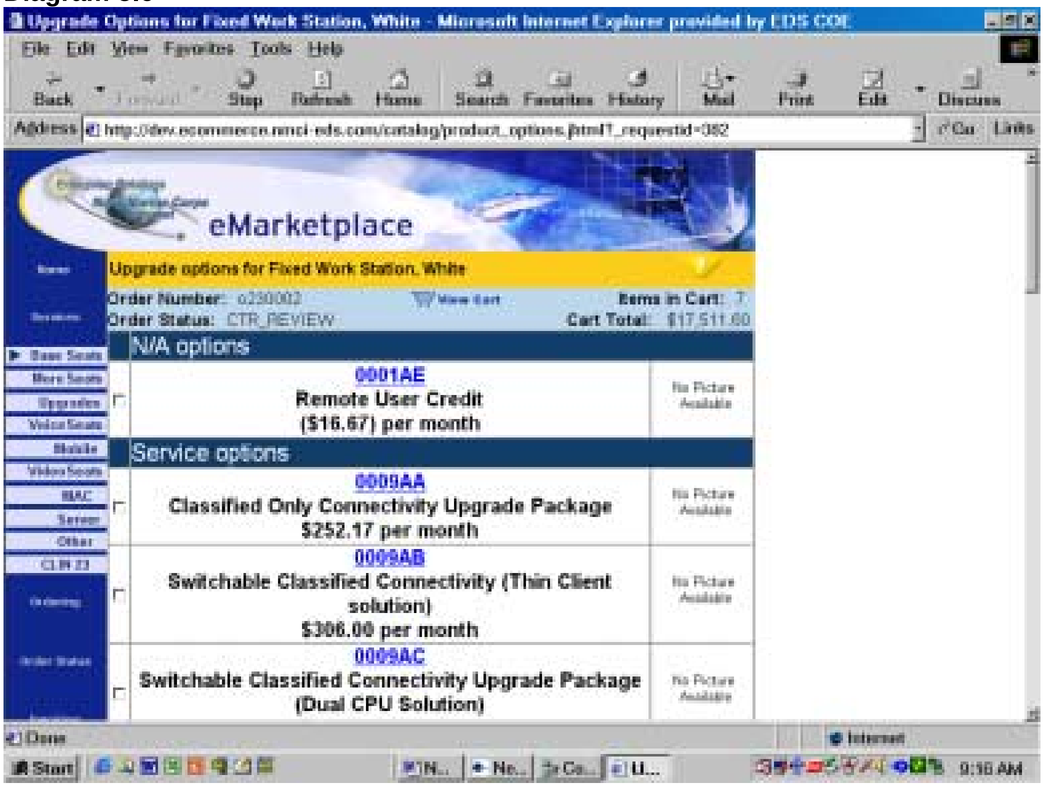
## *Adding an option to an Order Request*

1. For a User Login Id follow the instructions "User Access to an Unapproved Order Request" in section 3 of this document, and then return to this section.

   For a CTR Login Id follow the instructions "CTR Access to an Unapproved Order Request" in section 3 of this document, and then return to this section.

2. Click on "Add Options". If the CLIN has options a list of options is displayed (diagram 5.6).

**Diagram 5.6**




3. Select the desired options by clicking the check boxes in the left most column. More than one option may be selected.

   **Note:**
   Clicking on "Reset" clears all the check boxes.

4. Click on "Proceed" at the bottom of the page. You are returned to the "Shopping Cart" page. The options appear with the rest of your order request.

   **Note:**
   When ordering a product or service any required options should be ordered at the same time. If options are added as stand alone items not packaged with a product or service, they may be more expensive.

## *Viewing existing Task Orders or Order Requests*

On this page you can review the status of all order requests or task orders.

1. In the left hand toolbar click on "Ordering". You are transferred to the "Ordering Main Menu".
2. Click on "View Existing Task Order or Order Request". You are transferred to the "Search for Order" page.

3. A list of orders you have created or worked on appears. Several options are available:

    a. To review the order detail click on the order number in the "Number" column. You are transferred to the "Order Detail" page.
    b. To review the status history click on the link in the "Status" column. You are transferred to the "Order Status History" page.
    c. To search for orders you did not create or work on do the following:

        i. Select a search field from the "Find Order where" drop down list.
        ii. Select a comparison operator from the center drop down list.
        iii. Enter the search criteria in the last text box.
        iv. Click on "Search".

        **Note:**
        If there are no orders that match your search criteria the following message appears:

        No orders matching search criteria found.

## *Request a Quote for Un-priced Services*

On this page, you may request a quote for an un-priced CLIN.

1. In the left hand toolbar click on "Ordering". You are transferred to the "Ordering Main Menu".
2. Click on "Request Quote for Un-priced Services". You are transferred to the "Request for Quote" page.
3. Read the verbiage to insure you understand what is required when requesting a quote.
4. To request a quote for services click on the link next to "To request a quote".

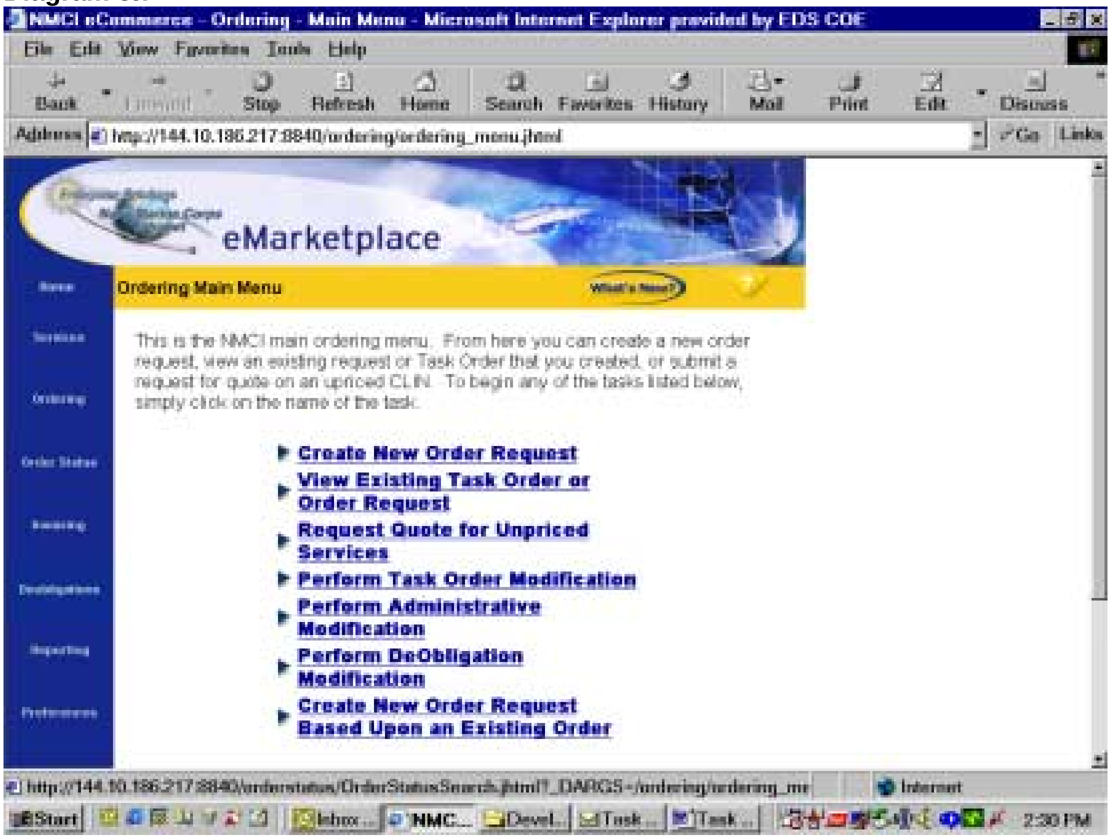
## *Perform Task Order Modification*

You may only perform a task order modification on an approved task order.

1. From the blue side menu click on "Ordering". You are transferred to the "Ordering Main Menu" (diagram 5.7).

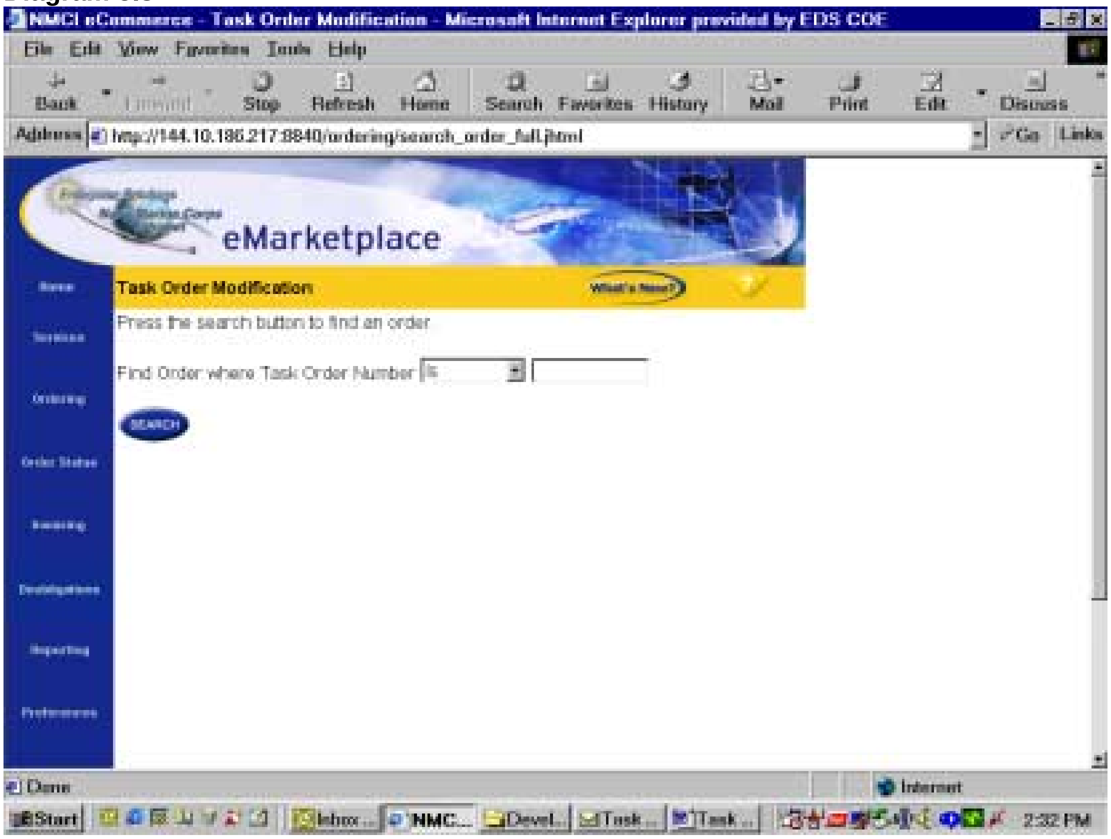
 

**Diagram 5.7**




2. Click on "Perform Task Order Modification". You are transferred to the "Task Order Modification" page (diagram 5.8).

**Diagram 5.8**

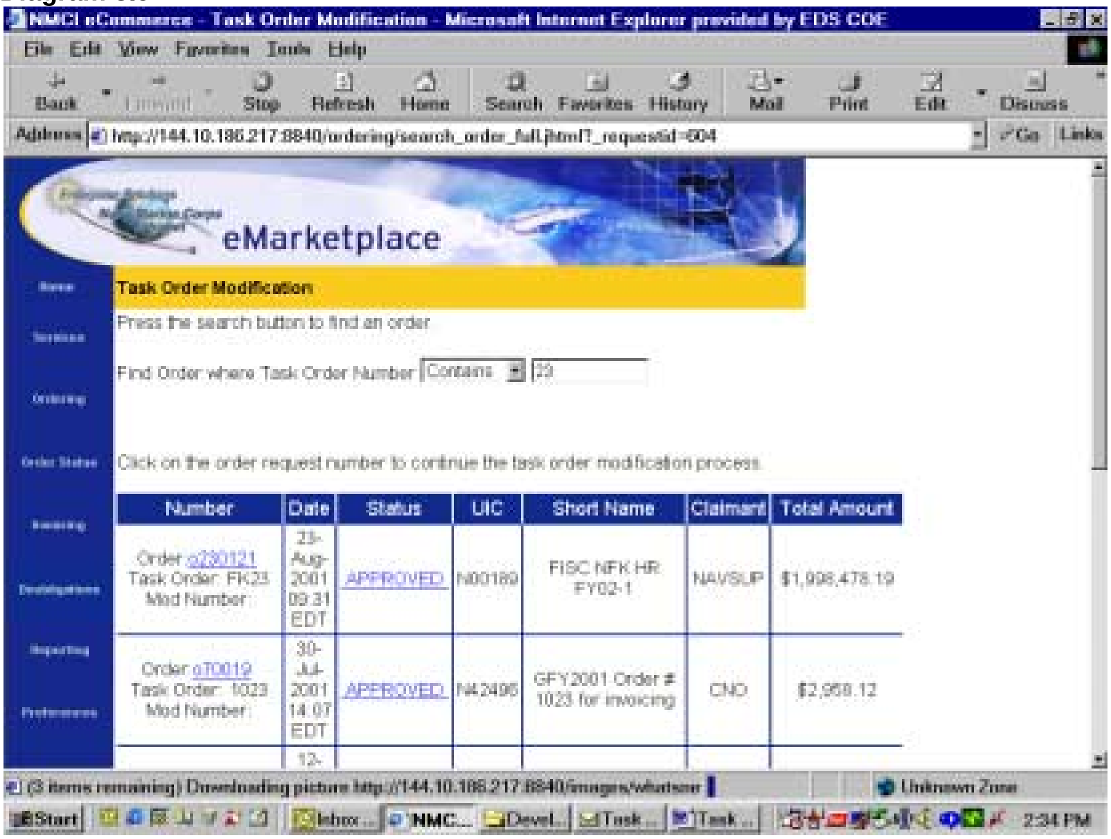



3. You must search for your task order before creating the task order modification.

   To search for an order do the following:

   a. Select a comparison operator from the drop down list.
   b. Enter the search criteria in the text box.
   c. Click on "Search".
   d. Task orders matching the search criteria are displayed (diagram 5.9).

**Diagram 5.9**

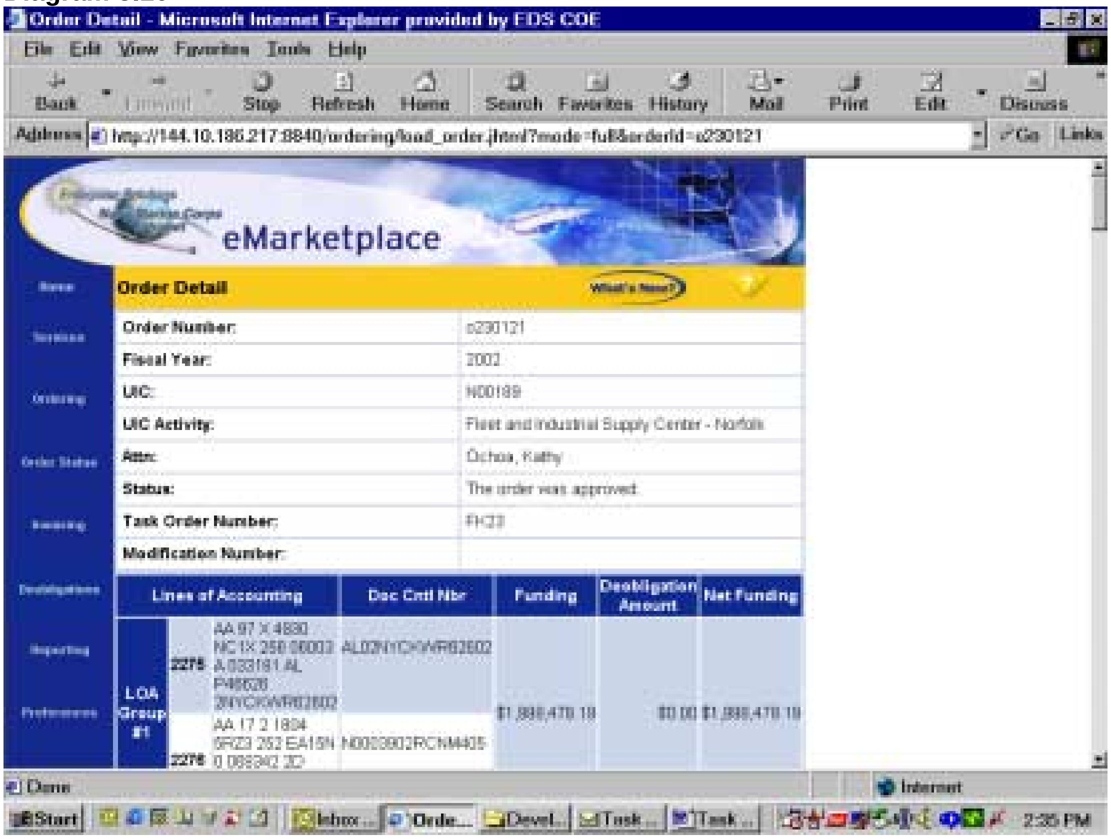



**Note:**
If there are no orders that match your search criteria the following message appears:

No orders matching search criteria found.

4. To review the status history click on the link in the "Status" column. You are transferred to the "Order Status History" page. Click on "Back" to return to the "Task Order Modification" page.
5. To access an order for modification click on the desired order request number in the "Number" column. You are transferred to the "Order Detail" page (diagram 5.10). The order detail is displayed and available for your review.

**Diagram 5.10**



6. Click on "Perform Task Order Modification" on the bottom of the page. You are transferred to the "Shopping Cart" page. The task order modification has been created and you may begin updating the order. A two-digit task order modification number is assigned to the order. For every task order modification created the number is incremented by 1 (i.e. 01, 02, 03, etc.). Only one task order modification may be worked on at a time.

   The procedures for updating and approving a task order modification and an order request are almost the same. The differences are described in the table below. For instructions on making updates to a task order modification please refer to the following sections in this document:

   Section 3 - Work List
   Section 5 - Ordering

   Below are the conditions and rules that apply to a task order modification's start date, end date, location, building, quantity, UIC, fiscal year, options, upgrades and funding (table 1.1).

**Table 1.1**

| FIELDS | CONDITION | RULE |
|---|---|---|
| Start Date | Existing Start Date is a past date. | Do not allow any changes. |
| | Existing Start Date is today's date. | Allow the date to be changed to a future date between today's date and applicable fiscal year end date, but earlier than the End Date. |
| | Existing Start Date is a future date. | Allow the date to be modified to a future date between today's date and applicable fiscal year end date, but earlier than the End Date. |
| End Date | Existing End Date is a past date. | Do not allow any changes. |
| | Existing End Date is today's date. | Allow the date to be changed to a future date between today's date and applicable fiscal year end date, but later than the Start Date. |
| | Existing End Date is a future date. | Allow the date to be modified to a future date between today's date and applicable fiscal year end date, but later than the Start Date. |
| Location | | Allow changes only if both Start Date and End Date are a future date. |
| Building | | Allow changes only if both Start Date and End Date are a future date. |
| Quantity | | Allow changes only if both Start Date and End Date are a future date. |
| UIC | | Do not allow any changes. |
| Fiscal Year | | Do not allow any changes. |
| Options/ Upgrades | | Allow changes only if both Start Date and End Date are a future date. |
| Funding | | Allow changes if at least the End Date is a future date. |

7. To submit the task order modification for approval click on "Submit for Approval". You are transferred to the "Confirmation" page. A message is displayed indicating your order has been submitted for approval.
8. Click on "OK". You are transferred to the "Home" page. The order request is placed in the work list of the next level up in the command chain.

# Section 6: Order Status

## Overview

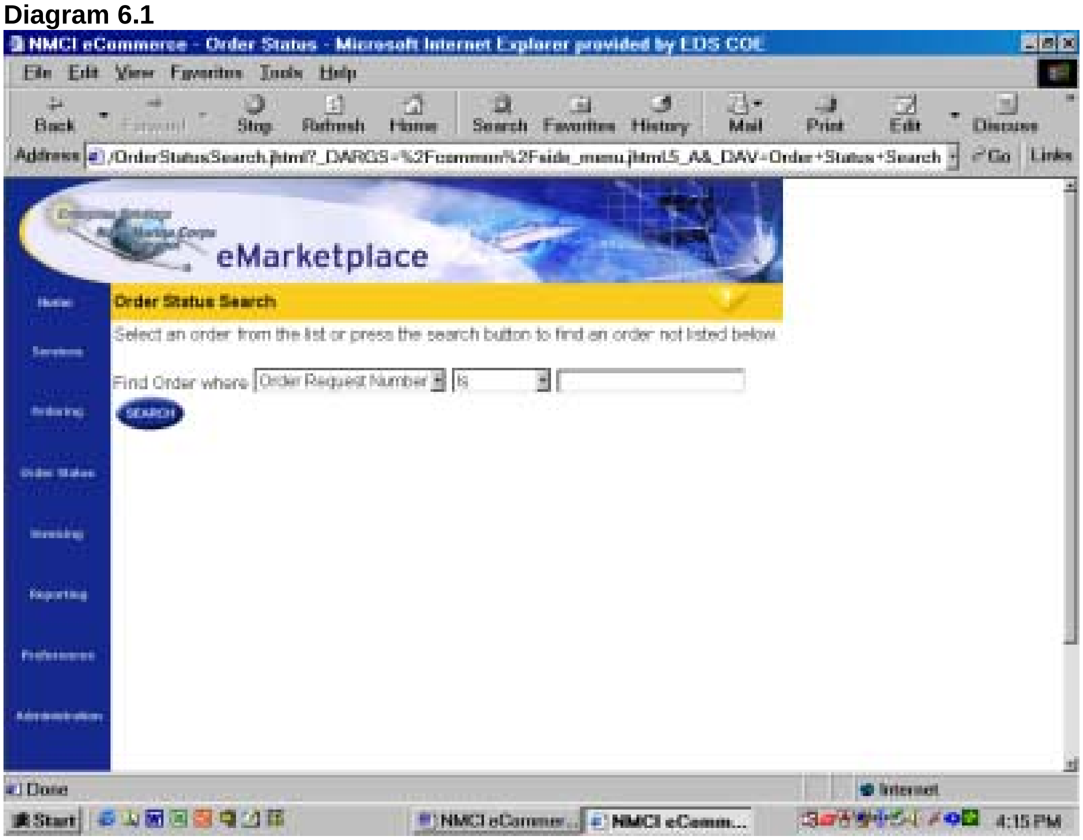
On the "Order Status" page you must perform a search for the desired order. The order detail is then displayed and available for review.

## *Viewing an Order Request Status*

### Search for an Order Request

1. In the left hand toolbar click on "Order Status". You are transferred to the "Order Status Search" page (diagram 6.1).
2. Select the desired search field from the "Find Order where" drop down list.

**Diagram 6.1**




3. Select a comparison operator from the middle drop down list.
4. Enter the search criteria in the last text box.
5. Click on "Search".

**Note:**

If there are no order requests that match your search criteria the following message appears:

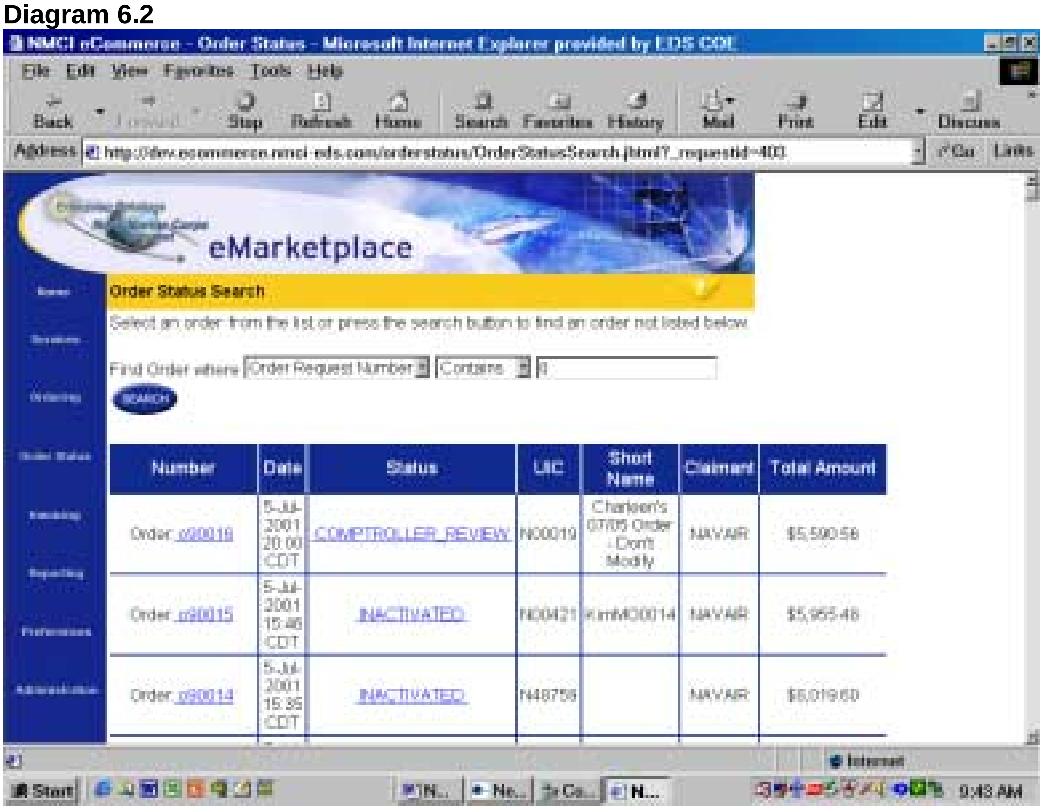
No orders matching search criteria found.

After successfully searching for an order you may review the order detail or status history. Detailed steps are provided below for viewing both the order request detail and order request status history.

## View Order Request Detail

1. To identify the order request you would like to view follow the instructions "Search for an Order Request" in section 6 of this document, and then return to this section.
2. Click on the order request number in the "Number" column (diagram 6.2).

**Diagram 6.2**




You are transferred to the "Order Detail page.

## View Order Request Status

1. To identify the order request you would like to view follow the instructions "Search for an Order Request" in section 6 of this document, and then return to this section.
2. Identify the order request number in the "Number" column. Click on the link in the "Status" column. You are transferred to the "Order Status History" page.

# Section 7: Invoicing

## Overview

The invoice worklist contains all invoice that have been submitted to you.  These invoices are waiting for your review and approval decision.  You may only make a decision for invoices that appear on your worklist.

On the "Invoice Search" page you may perform a search for an invoice.  Once a search has been executed a list of invoices is displayed.  Links to the Task Order, Invoice, and Invoice Status are available.

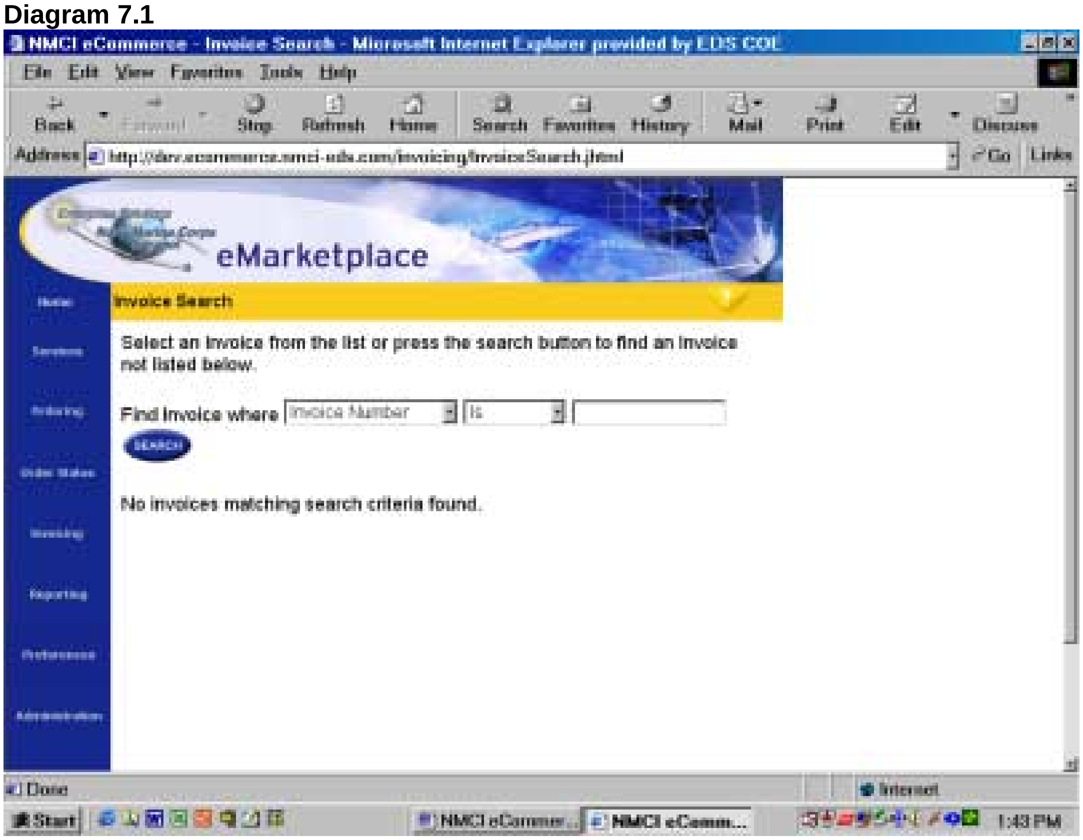
All users of the system can access invoice information from the invoicing menu.

## *Reviewing an Invoice*

### Search for an Invoice or Task Order

1. In the left hand toolbar click on "Invoicing".  You are transferred to the "Invoice Search" page (diagram 7.1).
2. Select the desired search field from the "Find Invoice where" drop down list.

**Diagram 7.1**



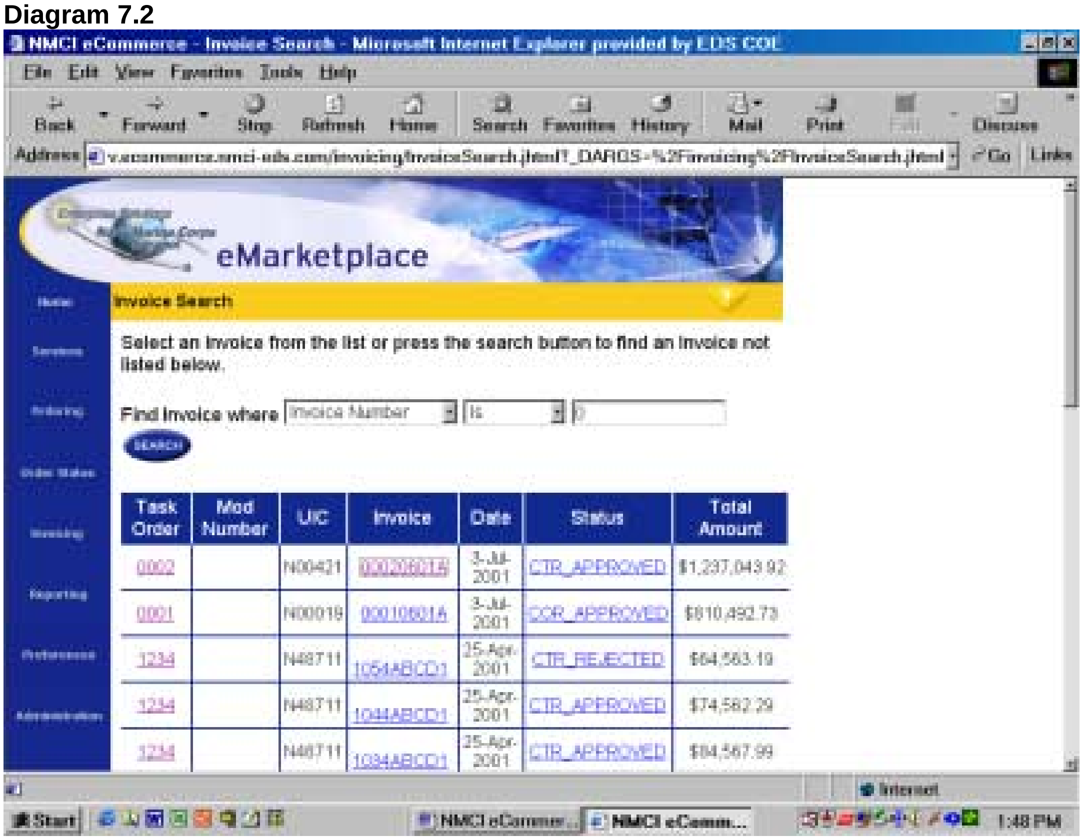

 

3. Select a comparison operator from the middle drop down list.
4. Enter the search criteria in the last text box.
5. Click on "Search". All invoices matching your search criteria are displayed (diagram 7.2).

   **Note:**
   If there are no invoices that match you search criteria the following message appears:

   No invoices matching search criteria found.

**Diagram 7.2**



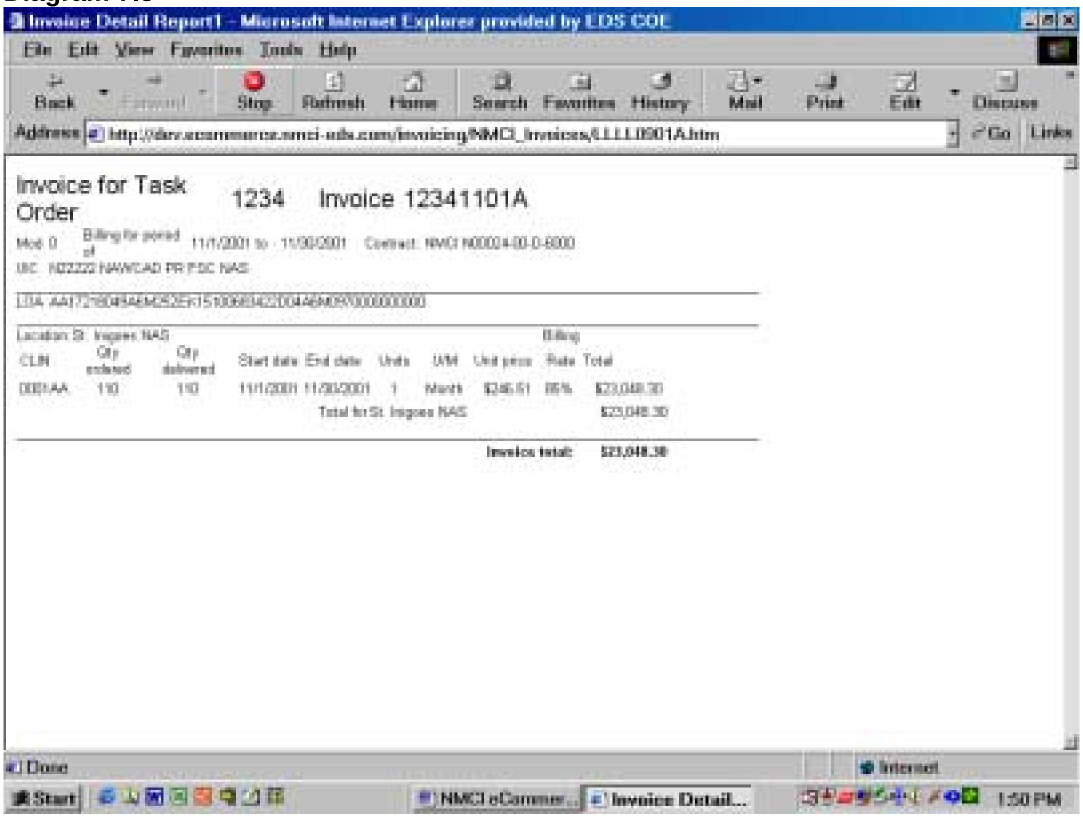

## View a Task Order

1. To identify the task order you would like to view follow the instructions "Search for an Invoice or Task Order" in section 7 of this document.
2. "Click on the task order number in the "Task Order" column.

## View Invoice Details

1. To identify the invoice you would like to view follow the instructions "Search for an Invoice or Task Order" in section 7 of this document.
2. Click on the invoice number in the "Invoice" column. The invoice is displayed (diagram 7.3).

**Diagram 7.3**

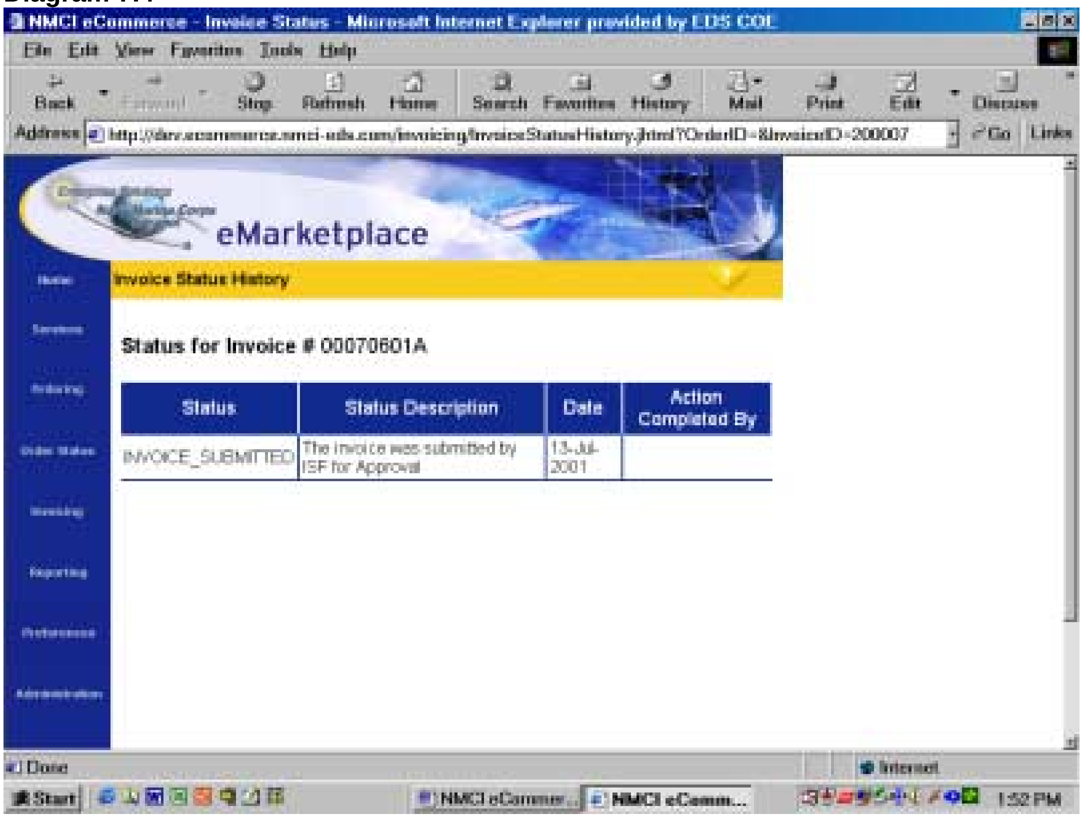


## View Invoice Status and Status History

1. To identify the invoice status you would like to view follow the instructions "Search for an Invoice or Task Order" in section 7 of this document. The current invoice status is displayed in the "Status" column.

2. Click on the link in the "Status" column. The invoice status history is displayed (diagram 7.4).

**Diagram 7.4**



# Section 8: Approving an Order up the Command Chain

## Overview

Once a new order request has been submitted for approval it must be approved up the command chain, until finally approved by the Activity Contracting Officer (ACO). After ACO approval the order request becomes a task order and may no longer be modified.

### *The Approval Process*

After approving an order request it is no longer available for updates. When you approve an order request it is removed from your work list, and added to the work list of the next level up in the command chain. Any level in the command chain may send an order back for rework to any lower level in the command chain. The approval chain works as follows:

#### User Approval of an Order Request

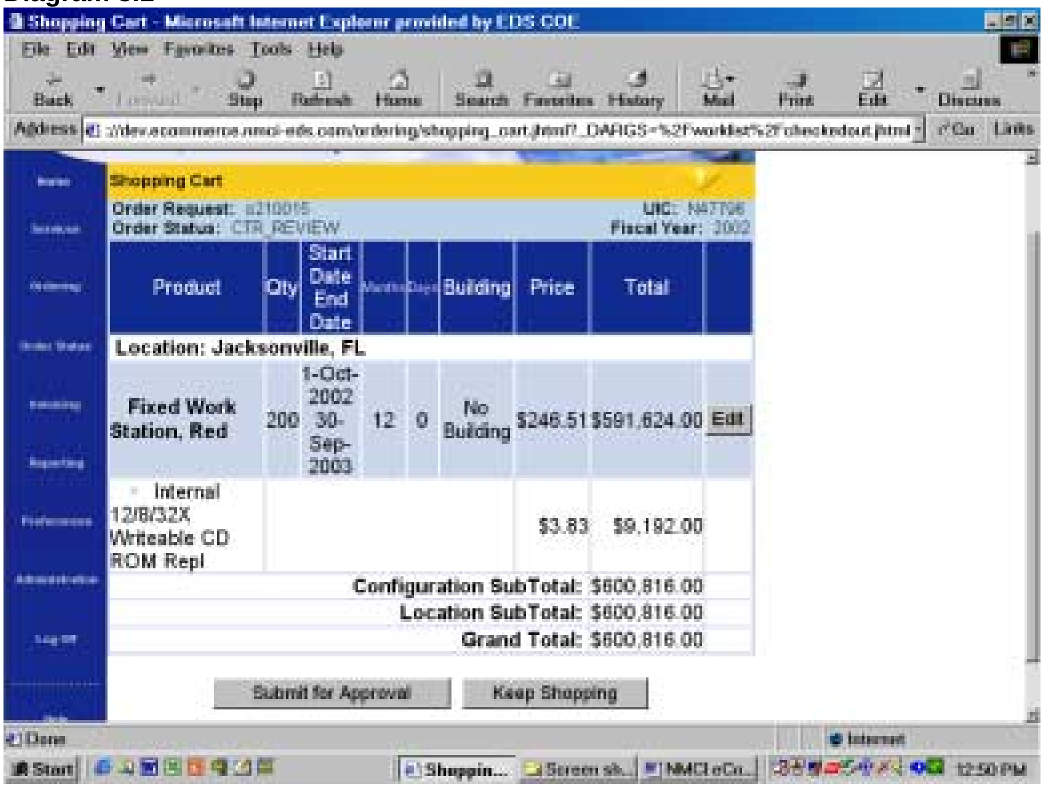
Once you have completed the updates to your order request it needs to be submitted for approval.

1. Click on "Home" in the left hand toolbar. You are transferred to the "Home" page.

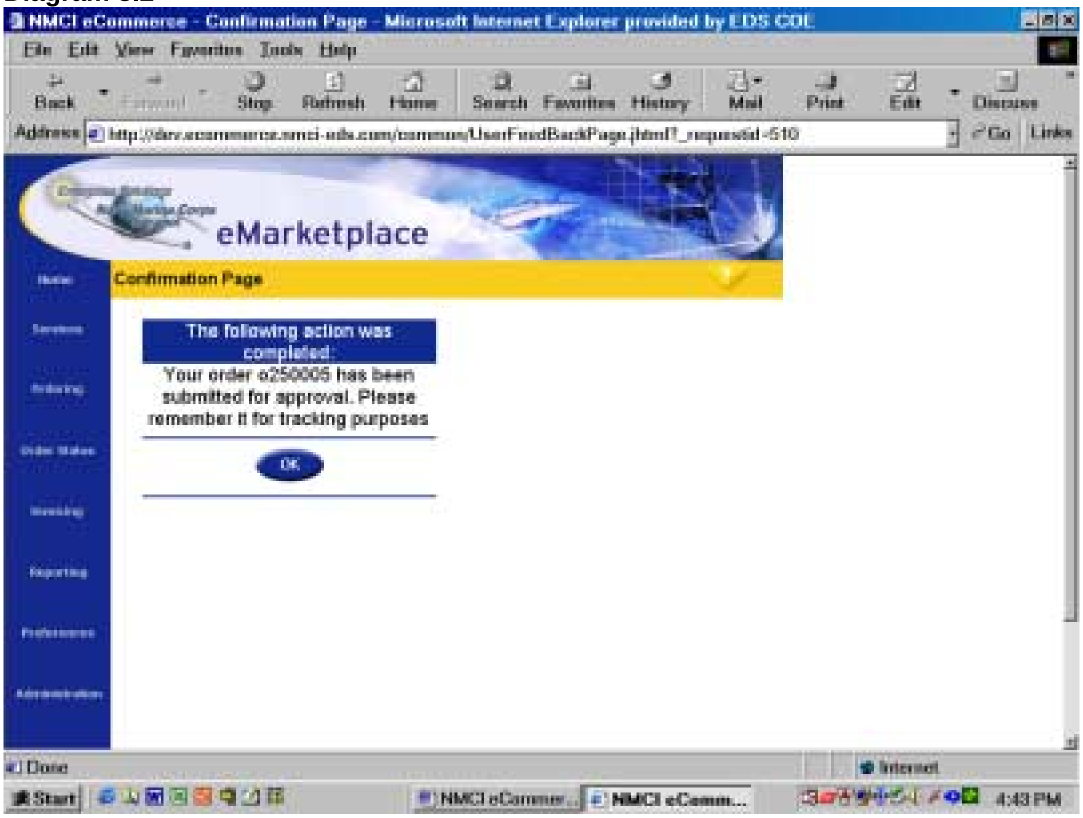
2. Identify the order request number in the work list "Order #" column. Click on "Complete" in the "Action" column. You are transferred to the "Shopping Cart" page (diagram 8.1).

**Diagram 8.1**



3. On the bottom of the "Shopping Cart" page click on "Submit for Approval". You are transferred to the "Confirmation" page (diagram 8.2).

**Diagram 8.2**




4. On the "Confirmation" page a message appears indicating your order request was submitted for approval. Click on "OK". You are returned to the "Home" page. Once an order request is submitted for approval it is no longer available for update. The order request no longer appears on the "Home" page work list. The order is placed in the CTR's work list.

## CTR Approval and Rework

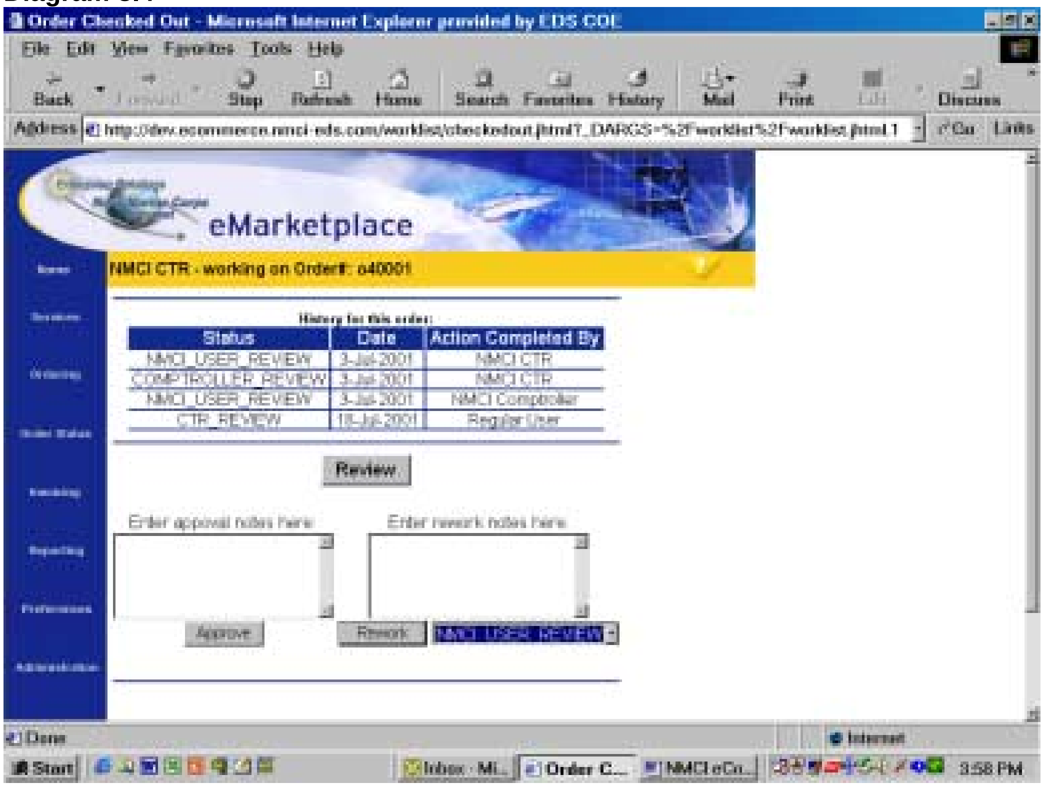
A CTR approves an order request created by a User.

1. On the "Home" page identify the desired order request in the work list "Order #" column (diagram 8.3).

**Diagram 8.3**

2. Click on "Check Out" in the "Action" column. You are transferred to the "working on order#" page (diagram 8.4).

**Diagram 8.4**




To approve the order request:

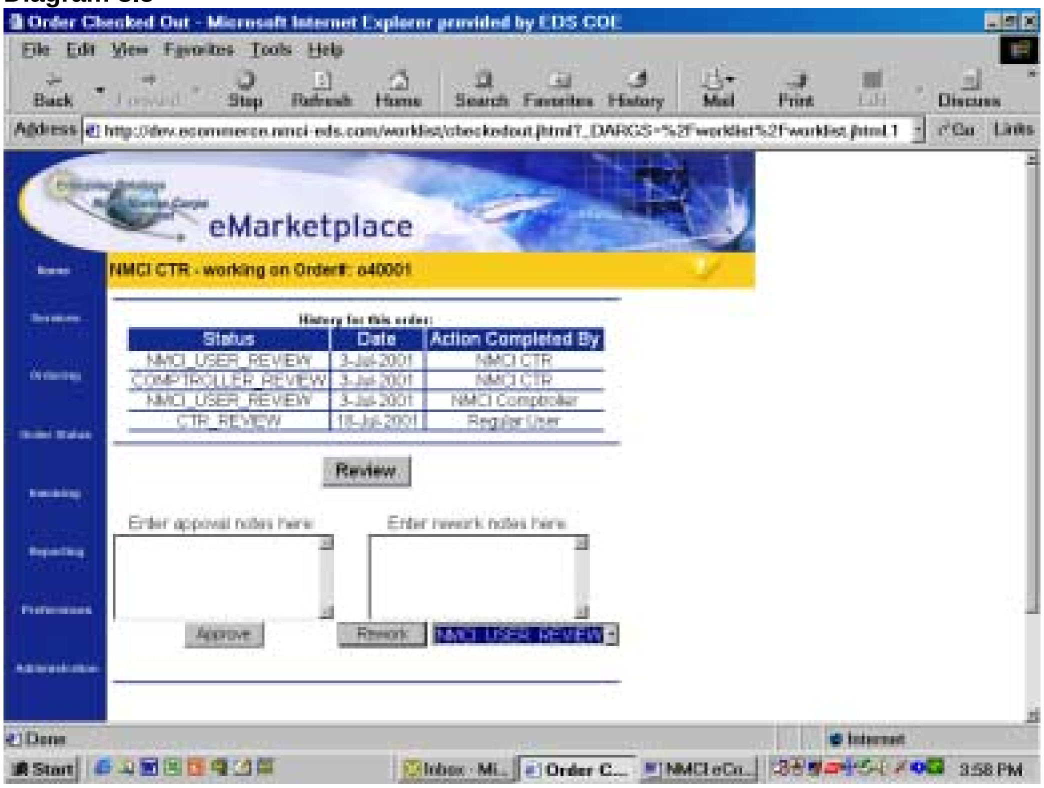
a. Add the approval notes in the "Enter approval notes here" text box.
b. Click on "Approve". You are transferred to the "Confirmation" page. A message is displayed indicating your order has been approved.
c. Click on "OK" on the "Confirmation" page. You are transferred back to the "Home" page. The order request is removed from the CTR work list.

**Note:**
Upon approval, if the order request had a request for an un-priced CLIN it is placed in the CIO work list, not the Comptroller's work list. Otherwise, the orders are always placed in the Comptroller's work list.

To send the order request back for rework:

**Note:**
A CTR may not send an order request back for rework if they created the order request. The rework option will not appear on the "working on order#" page (diagram 8.5).

**Diagram 8.5**




a. Add the rework notes in the "Enter rework notes here" text box.
b. Select the rework level from the drop down list.
c. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating the order was sent back for rework.
d. Click on "OK". You are transferred back to the "Home" page. The order request is removed from the CTR's work list and placed in the User's work list.

## CIO Approval and Rework

A CIO approves an order request that was previously approved by a CTR where the order has a request for an un-priced CLIN.

1. On the "Home" page identify the desired order request in the work list "Order #" column.

2. Click on "Check Out" in the "Action" column (diagram 8.6).

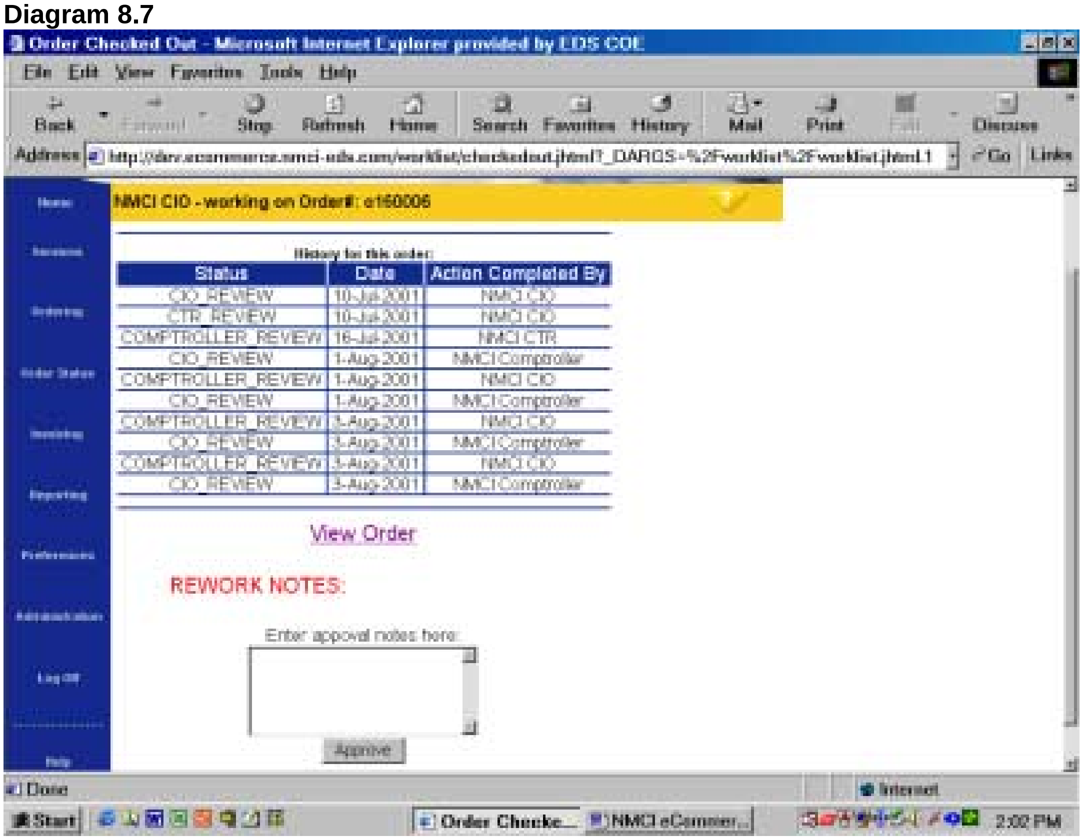
**Diagram 8.6**

You are transferred to the "working on Order #" page (diagram 8.7).

3. To review a read only summary of the order click on "View Order". After reviewing the order return by clicking on "Back" in the browser toolbar.
4. To approve the order request:

   a. Add the approval notes in the "Enter approval notes here" text box.
   b. Click on "Approve". You are transferred to the "Confirmation" page. A message is displayed indicating the order has been approved.
   c. Click on "OK". You are transferred back to the "Home" page. The order request is no longer in the CIO work list and is placed in the Comptroller's work list.

**Diagram 8.7**




To send the order request back for rework:

   a. Add the rework notes in the "Enter rework notes here" text box.
   b. Select the rework level from the drop down list.
   c. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating the order was sent back for rework.
   d. Click on "OK". You are transferred back to the "Home" page. The order request is removed from the CIO's work list and placed in the CTR's work list.

## Comptroller Approval and Rework

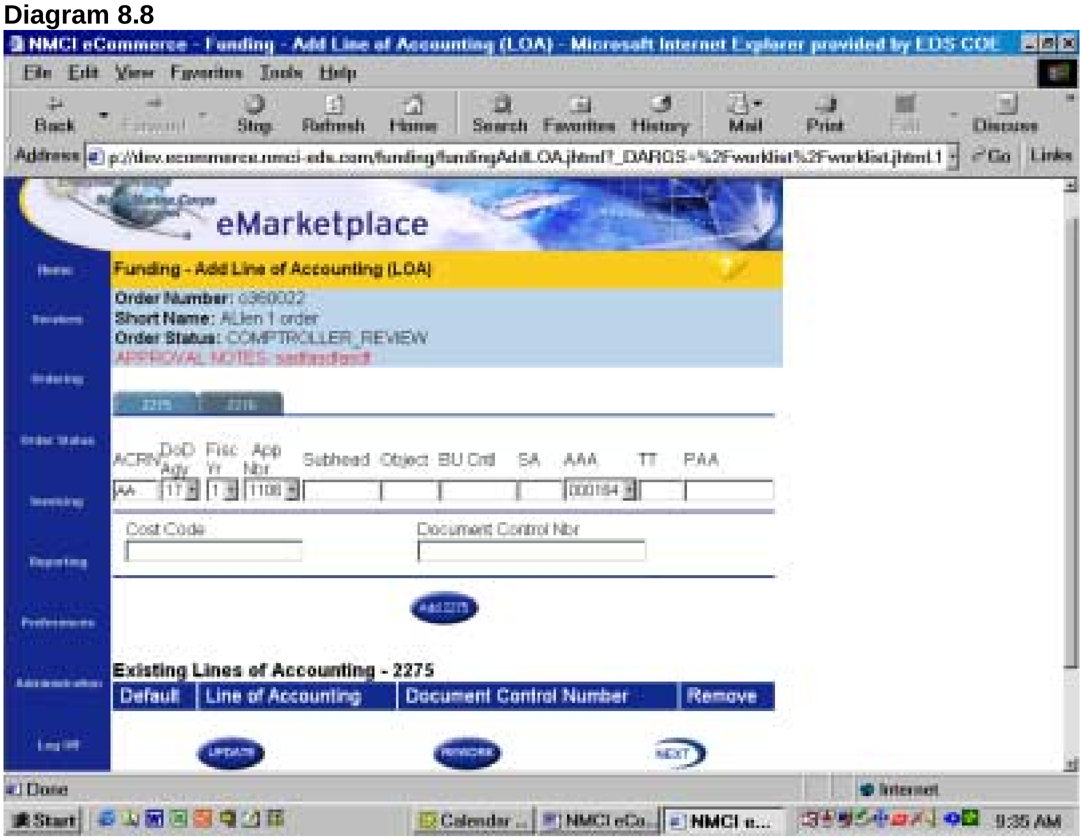
The Comptroller approves order requests previously approved by the CTR or CIO. The function of the Comptroller is to add the 2275 funding information to the order request, and assign 2275 information to each CLIN in the order request.

**Note:**
An order request must be tied to at least one 2275, however, multiple 2275s may be added to an order request.

1. On the "Home" page work list identify the desired order request in the work list "Order #" column.
2. To review the order before approving, click on the order number in the "Order #" column. The order detail is displayed. After reviewing the order return back to the "Home" page by clicking on "Back" in the web browser toolbar.
3. Click on "Check Out" in the "Action" column. You are transferred to the "Funding - Add Line of Accounting (LOA)" page (diagram 8.8).
4. Transfer the 2275 funding information from the "Order for Work and Services – Form 2275" to the fields on the page. For ease of use the ACRN has been pre-populated, however, it may be changed if so desired.

   If 2275 information was previously entered for this order request, that information will be displayed in the lower half of the screen.

**Diagram 8.8**



5. Click on "Add 2275" to link the order request to the 2275 funding information.

   **Note:**
   More than one 2275 may be added to the order request. Repeat the above steps for any additional 2275s that need to be added to the order.

6. To save the new 2275 information click on "Update".
7. To remove the 2275 information from the order request check the "Remove" check box and click on "Update". More than one 2275 may be removed from an order at the same time.
8. To send the order request back for rework do the following:

   a. Click on "Rework". You are transferred to the "Funding - Rework Order" page.
   b. Enter the rework notes in the "Enter rework notes here" text box.
   c. Select the appropriate rework level from the drop down list.
   d. Click on "Rework". On the "Conformation" page a message is displayed indicating that the order has been sent for rework.
   e. Click on "OK". You are returned to the "Home" page. The order has been removed from the Comptroller work list, and placed in the work list of the level selected on the funding rework order page.

9. If more than one 2275 is attached to the order request the first 2275 added becomes the default. You may select a different 2275 to be the default by clicking the corresponding "Default" radio button.

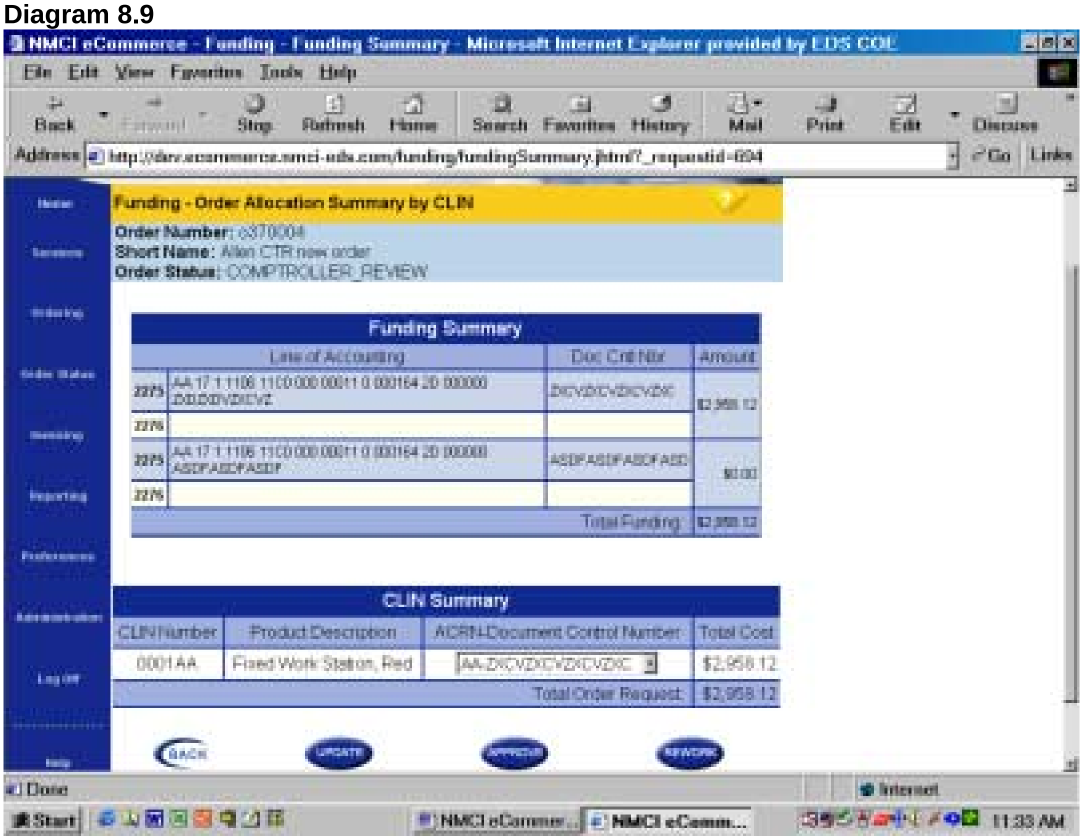
 

10. After you have completed adding the 2275 information click on "Next". You are transferred to the "Funding - Order Allocation Summary by CLIN" page (diagram 8.9).

    **Note:**
    To return back to the "Funding - Add Line of Accounting (LOA)" page click on "Back".

11. The page is broken into two sections. The first section (funding summary) displays total funding allocation amounts for each 2275 LOA/Document Control Number combination in an order. The second section contains the CLIN Summary, which is in the lower half of the page. This section provides the CLIN number, Product Description, default 2275 ACRN and Document Control Number, and the Total Cost for each unique CLIN in the order.

**Diagram 8.9**




   a. To change the 2275 associated with a specific CLIN:

      **Note:**
      The 2275 that was selected as the default on the "Funding - Add Line of Accounting" page will be displayed in the "ACRN-Document Control Number" column of the CLIN Summary table.
      Changing the 2275 for a specific CLIN may only be done if more than one 2275 was added to the order request.

      i. Identify the CLIN you would like to change by reviewing the CLIN number in the "CLIN Number" column. Select the desired 2275 from the drop down list in the "ACRN - Document Control Number" column. Repeat this step for any other CLINs where the 2275 needs to change.

ii. Click on "Update" on the bottom of the page. The dollar amounts in the "Amount" column (top portion of the page) are adjusted to reflect the change.

b. To send the order request back for rework:

i. Click on "Rework". You are transferred to the "Funding - Rework Order" page.
ii. Enter the rework notes in the "Enter rework notes here" text box.
iii. Select the appropriate rework level from the drop down list.
iv. Click on "Rework".
v. On the "Conformation" page a message is displayed indicating the order has been sent for rework.
vi. Click on "OK". You are returned to the "Home" page. The order has been removed from the Comptroller's work list, and placed in the work list of the level selected on the funding rework order page.

c. To approve the order request:

i. Click on "Approve".
ii. On the "Confirmation" page you receive a message indicating the order request was approved.
iii. Click on "OK". You are returned to the "Home" page. The order request is removed from the Comptroller's work list and placed in the SPAWAR's work list.

### SPAWAR Approval and Rework

The Space and Naval Warfare (SPAWAR) approves order requests previously approved by the Comptroller. The function of the SPAWAR is to assign 2276 funding information to each 2275 in the order request.

**Note:**
A 2276 is required for each 2275.

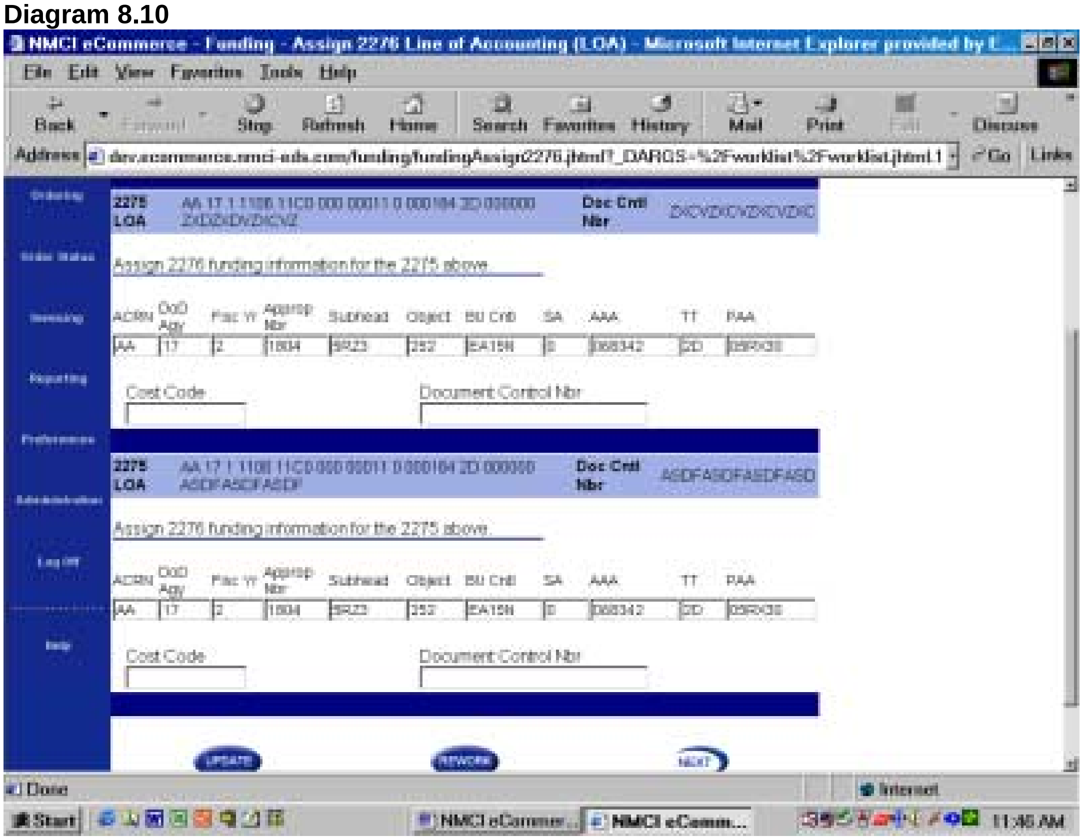
1. On the "Home" page identify the desired order request in the work list "Order #" column.
2. To review the order before approving, click on the order number in the "Order #" column. You are transferred to the "Order Detail" page. The order detail is displayed. After reviewing the order return back to the "Home" page by clicking on "Back" in the web browser toolbar.

3. Click on "Check Out" in the "Action" column. You are transferred to the "Funding - Assign 2276 Line of Accounting (LOA)" page (diagram 8.10).
4. Transfer the 2276 funding information from the " Request for Contractual Procurement – Form 2276" to the fields on the page.

**Note:**
If this is the first time you are assigning 2276 information for this order request, for ease of use, all text fields (with the exception of the Cost Code and the Document Control Number) are pre-populated. These fields may be changed if so desired.

If 2276 information was previously entered for this order request, that information will be displayed.

**Diagram 8.10**



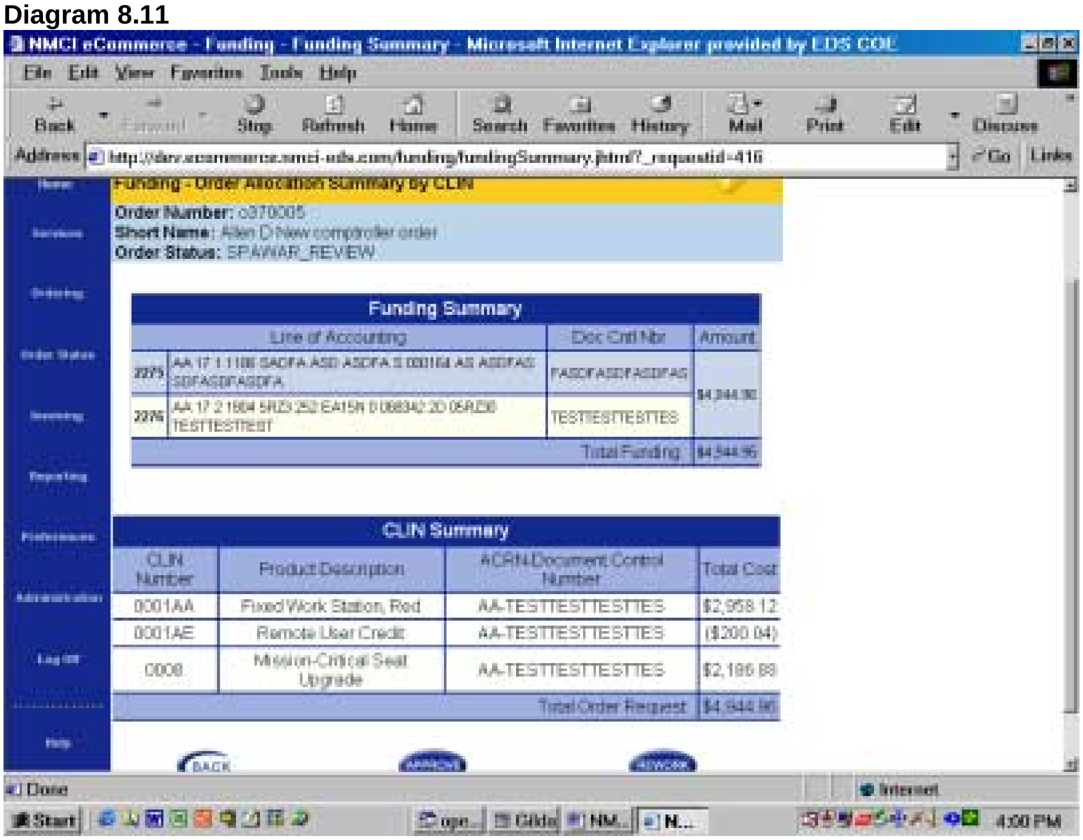

**Note:**
Each 2275 is displayed with a corresponding blank 2276. A 2276 must be filled out for each 2275 tied to the order request. The same 2276 may be used for more than one 2275. Complete all 2276s on the page.

a. To save the new 2276 information click on "Update".
b. To change a 2276 it must be replaced with new information. Type over the old 2276 information with new information, and click on "Update" to save your changes.
c. To send the order request back for rework click on "Rework". You are transferred to the "Funding - Rework Order" page.

i. Enter the rework notes in the "Enter rework notes here" text box.
ii. Select the appropriate rework level from the drop down list.
iii. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating that the order has been sent for rework.
iv. Click on "OK". You are returned to the "Home" page. The order has been removed from the SPAWAR work list, and placed in the work list of the level selected on the funding rework order page.

5. Once all 2276 information has been entered, you may continue the 2276 allocation process by clicking on "Next". You are transferred to the " Funding - Order Allocation Summary by CLIN" page (diagram 8.11).

**Diagram 8.11**




6. The page is broken into two sections. The first section (funding summary) displays total funding allocation amounts for each 2275/2276 LOA/Document Control Number combination in the order request. The second section contains the CLIN Summary, which is in the lower half of the page. This section provides the CLIN number, Product Description, 2276 ACRN and Document Control Number, and Total Cost for each unique CLIN in the order.

   a. To return to the " Funding - Assign 2276 Line of Accounting (LOA)" page, or change the 2276 information click on "Back".

b. To send the order request back for rework:

   i. Click on "Rework". You are transferred to the " Funding - Rework Order" page.
   ii. Enter the rework notes in the "Enter rework notes here" text box.
   iii. Select the appropriate rework level from the drop down list.
   iv. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating that the order has been sent for rework.
   v. Click on "OK". You are returned to the "Home" page. The order has been removed from the SPAWAR work list, and placed in the work list of the level selected on the funding rework order page.

7. To approve the order click on "Approve". You are transferred to the "Confirmation" page. A message is displayed indicating that the order request was approved.
8. Click on "OK". You are returned to the "Home" page. The order request is removed from the SPAWAR work list and placed in the ACO work list.

## ACO Approval

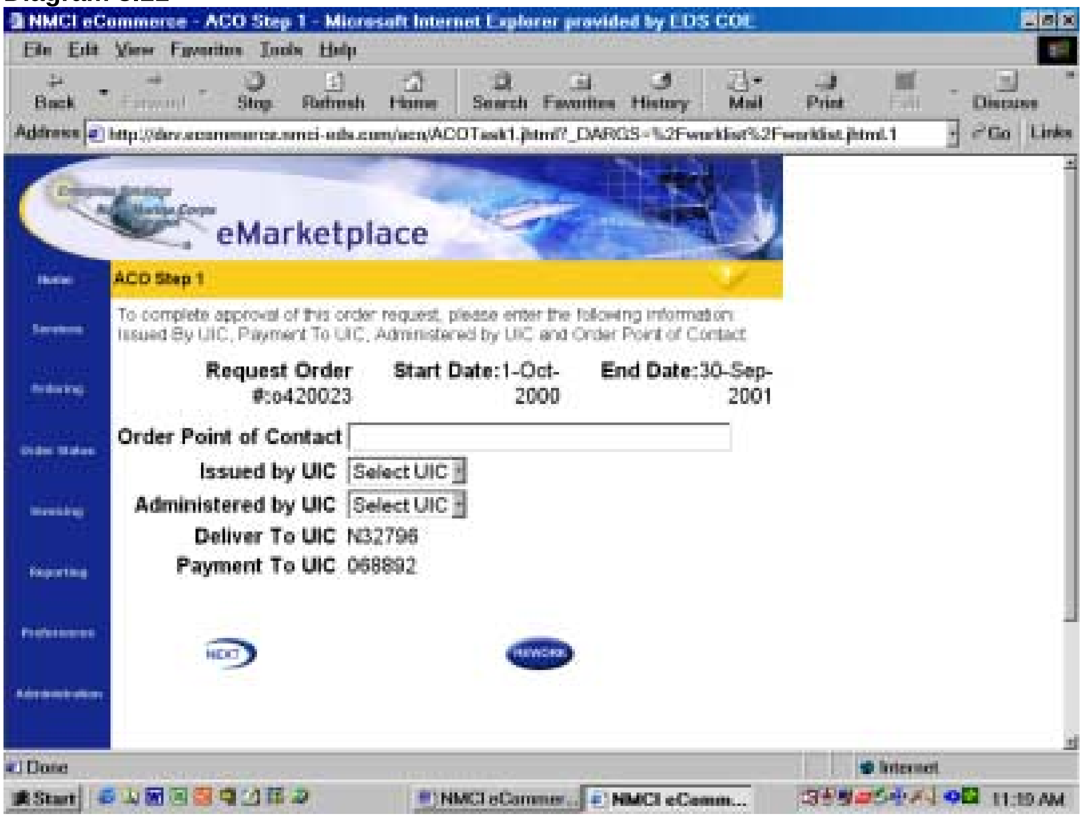
The ACO approves order requests previously approved by the SPAWAR. The function of the ACO is to add the final order request information, and give final approval to the order changing the order request to a task order.

1. On the "Home" page work list identify the desired order request in the work list "Order #" column.
2. To review the order before approving, click on the order number in the "Order #" column. After reviewing the order return back to the "Home" page by clicking on "Back" in the web browser toolbar.

3. Click on "Check Out" in the "Action" column. You are transferred to the "ACO Step 1" page (diagram 8.11).

**Diagram 8.11**




   a. To send the order request back for rework click on "Rework". You are transferred to the "Rework Order" page.

      i. Enter the rework notes in the "Enter rework notes here" text box.
      ii. Select the appropriate rework level from the drop down list.
      v. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating that the order has been sent for rework.
      iv. Click on "OK". You are returned to the "Home" page. The order has been removed from the ACO work list, and placed in the work list of the level selected on the rework order page.

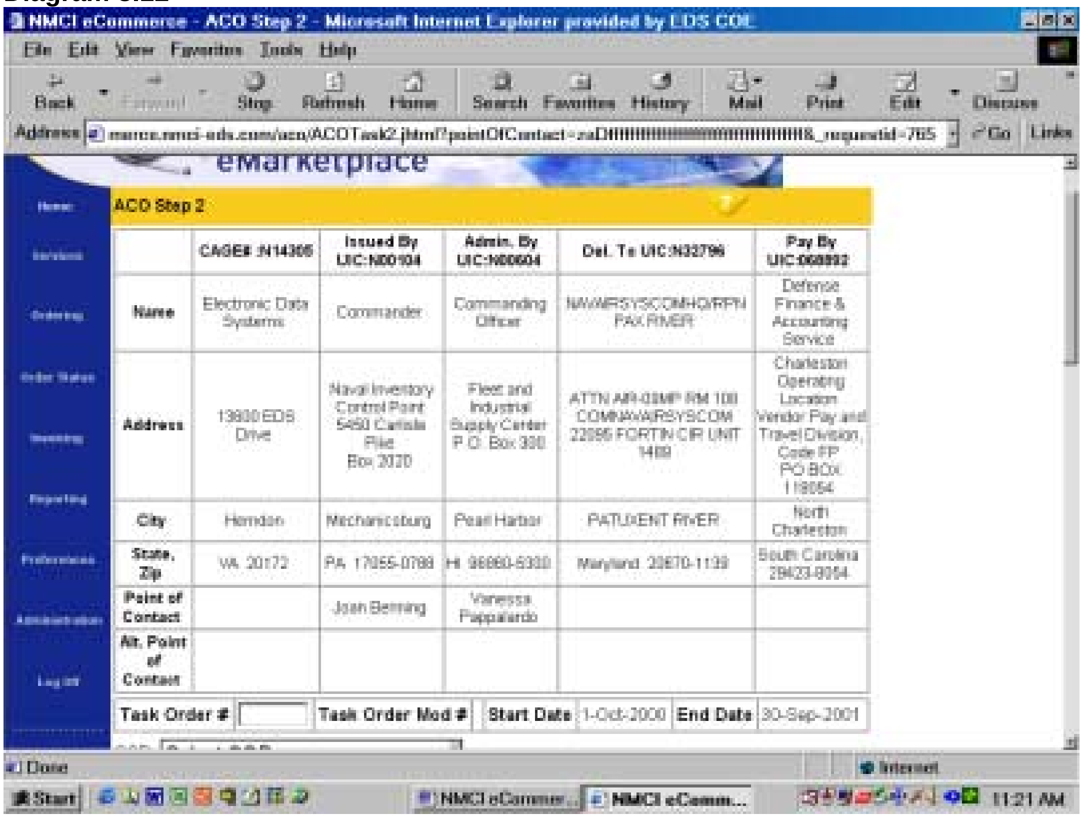
4. On the "ACO Step 1" page enter or select:

   a. Point of Contact
   b. Issued by UIC
   c. Administered by UIC

Click on "Next". You are transferred to the "ACO Step 2" page (diagram 8.12).

**Diagram 8.12**



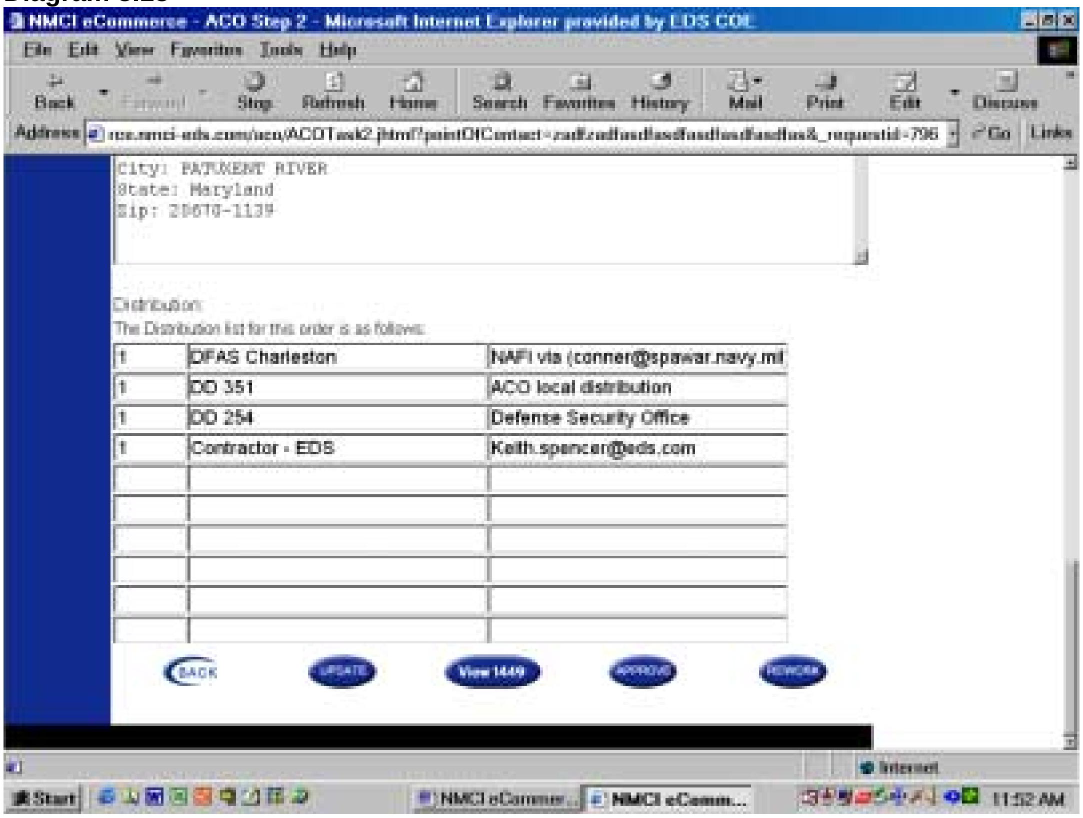

5. On the page enter:

   a. Task Order # in the "Task Order #" text box.
   b. Select a COR from the "COR" drop down list.
   c. Enter comments in the "General Comments" text box.
   d. Enter the order notes in the "Order Notes" text box.
   e. Review the address in the "Deliver Address" text box and update if necessary.
   f. Review the distribution information in the "Distribution" text boxes. Update and add distribution information if necessary.

6. The following options exist on the bottom of the "ACO Step 2" page (diagram 8.13):

**Diagram 8.13**




a. Click on "Back" to return back to the "ACO Step 1" page, and cancel the changes made on the "ACO Step 2 " page.
b. Click on "UPDATE" to save the changes made to the "ACO Step 2" page.
c. Click on "View 1449" to view the 1449 report.
d. To approve the order do the following:

   i. Click on "Approve".
   ii. On the "Confirmation" page you receive a message indicating the order request was approved.
   iii. Click on "OK". You are returned to the "Home" page. The order request is removed from the ACO work list. The order request becomes a task order.

e. To send the order request back for rework do the following:

   i. Click on "Rework". You are transferred to the "Rework Order" page.
   ii. Enter the rework notes in the "Enter rework notes here" text box.
   iii. Select the appropriate rework level from the drop down list.

vi. Click on "Rework". You are transferred to the "Confirmation" page. A message is displayed indicating that the order has been sent for rework.

iv. Click on "OK". You are returned to the "Home" page. The order has been removed from the ACO work list, and placed in the work list of the level selected on the rework order page.

# Section 9: Approving and Rejecting an Invoice

## Overview

On the "Home" page invoice work list all the invoices that are awaiting approval are displayed. The invoices are loaded into the NMCI website and are routed to the appropriate CTR or COR. They need to be reviewed by the CTR and/or COR. Only a COR may approve or reject invoices. A CTR may recommend approval or rejection. An invoice contains all the CLINs for a specific UIC, and the monthly charges.

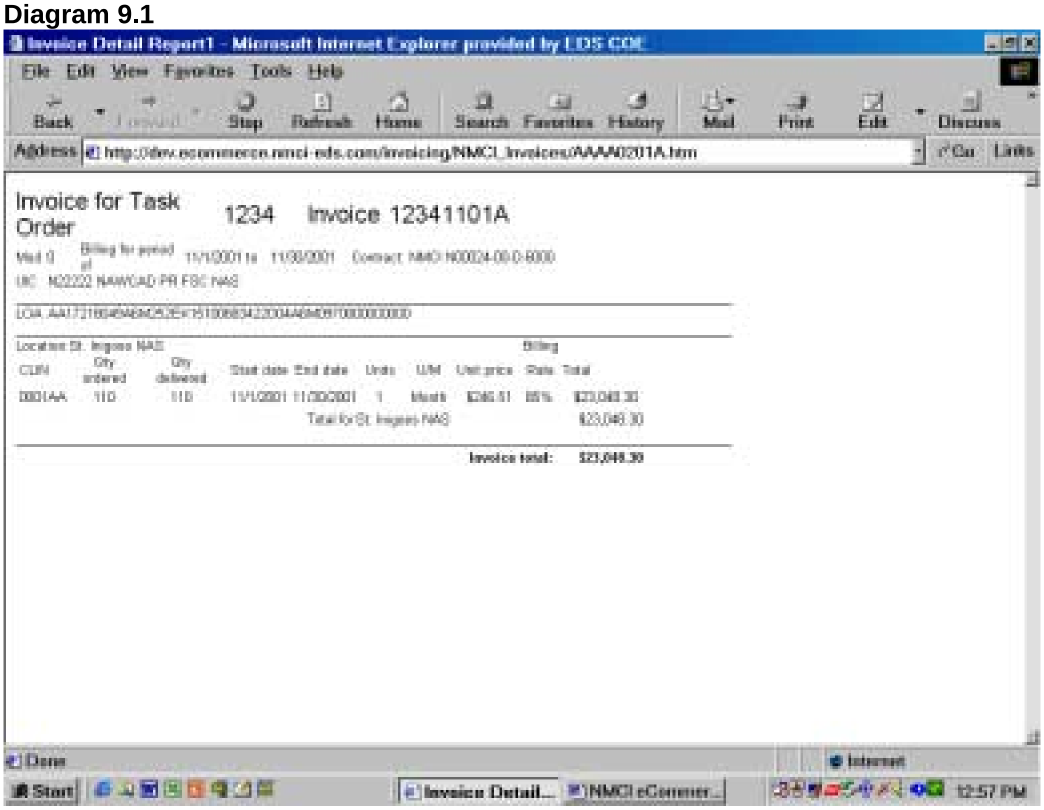
**Note:**
CTR and COR are the only Login Ids that will have an invoice work list on the "Home" page.

### *Invoice Work List*

#### Reviewing an Invoice

On the "Home page in the invoice work list, click on the desired invoice number in the "Invoice" column. The invoice is displayed (diagram 9.1). The invoice is sorted by line of accounting, location, and CLIN. Each location is sub-totaled, and at the bottom of the invoice is the invoice total.

**Diagram 9.1**



## Approving and Rejecting an Invoice

1. On the "Home" page identify the desired invoice number in the invoice work list "Invoice" column.
2. To review the invoice before approving, click on the invoice number in the "Invoice" column. After reviewing the invoice return back to the "Home" page by clicking on "Back" on the browser toolbar.
3. Click on "Check Out" in the "Action" column.

   a. To approve the invoice:

      i. Click on "Approve".
      ii. On the "Confirmation" page you receive a message indicating the invoice was approved.
      iii. Click on "OK". You are returned to the "Home" page.

      **Note:**
      If the invoice was approved by a CTR it is removed from the CTR invoice work list and remains in the COR invoice work list with an updated status. The COR then needs to approve or reject the invoice.

      If the invoice was approved by a COR it is removed from the COR and CTR work lists.

   b. To reject an invoice:

      i. Enter the rework notes in the "Enter rework notes here" text box.
      ii. Click on "Reject".
      iii. On the "Confirmation" page you receive a message indicating the invoice was rejected.
      iv. Click on "OK". You are returned to the "Home" page.

      **Note:**
      If the invoice was rejected by a CTR it removed from the CTR work list and remains in the COR work list with an updated status.

      If the invoice was rejected by a COR it is removed from both the COR and CTR work lists.

# Section 10: Reporting

## Overview

From the reporting page you can view a variety of reports. Reports have been categorized into the groupings listed below:

- Report by Task Order SF1449
- CLIN by UIC
- CLIN by Claimant
- CLIN by DON
- Dollar Summary by Claimant

### *Creating Reports*

#### Report by Task Order SF1449

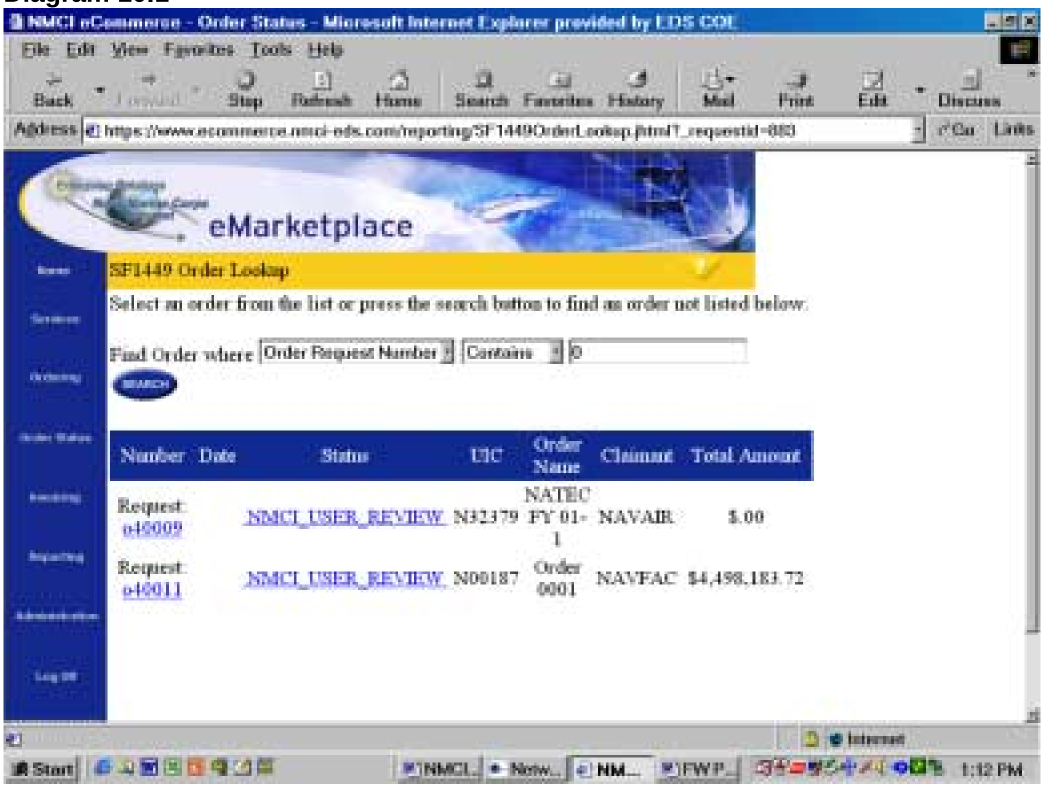
The "Report by Task Order SF1449" report lists the contract information for a specific order request. The "Report by Task Order SF1449" page lists all, or selected order requests associated with your work group. From this page you can generate the report for any order request listed.

1. In the left hand toolbar click on "Reporting". You are transferred to the "Reporting" page.

2. Click on "Report by Task Order SF1449". You are transferred to the "Report by Task Order SF1449" page (diagram 10.1). All the orders associated with you work group are listed. You can scroll through the list to identify an order or you can search for an order.

**Diagram 10.1**




**Note:**

If upon entering the "Report by Task Order SF1449" page there are no orders found the following message appears:

No orders found for NMCIXXX (where XXX is your Login Id).

### Searching for an Order

1. In the "Find Order where" drop down list select the field you wish to search against.
2. In the middle drop down list select a comparison operator.
3. In the last text box enter your search criteria.
4. Click on "Search".

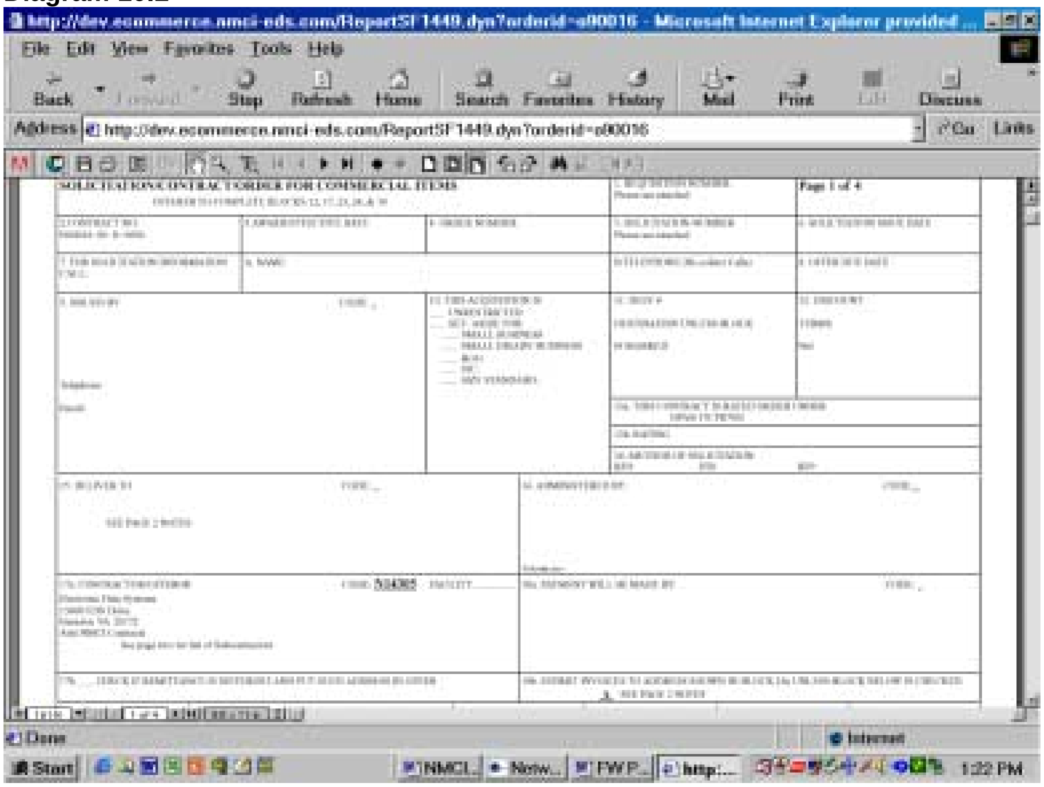
**Note:**

If there are no order requests that match you search criteria the following message appears:

No orders matching search criteria found.

5. To generate a report click on the order request number in the "Order Number" column. The report is displayed (diagram 10.2).

**Diagram 10.2**



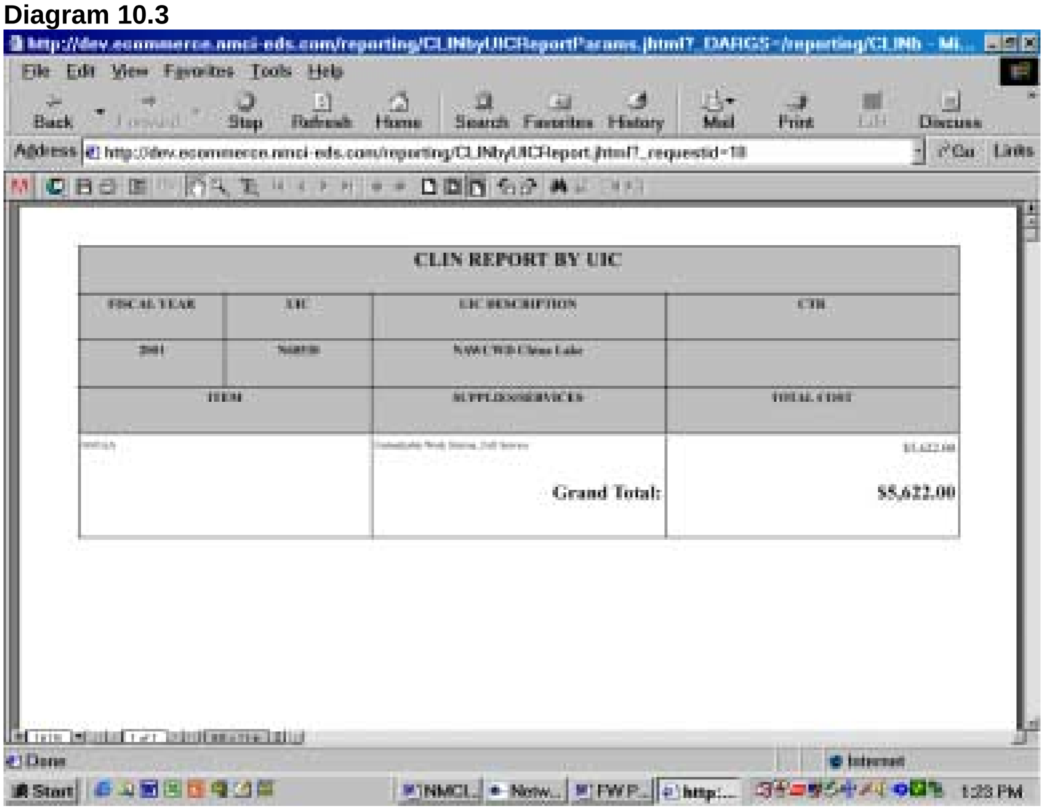

6. Click on "Back" in the web browser toolbar to return to the "report by Task Order SF1449" page.
7. The current order status is listed in the "Status" column. To review the status history click on the link in the "Status" column. You are transferred to the "Order Status History" page.
8. Click on "Back" to return back to the "Report by Task Order SF1449" page.

## CLIN by UIC

This report lists all the CLINs, and the costs for a specific UIC and fiscal year.

1. In the left hand toolbar click on "Reporting". You are transferred to the "Reporting" page.
2. Click on "CLIN by UIC". You are transferred to the CLIN by UIC Report Parameters" page.
3. In the "UIC" drop down list select the desired UIC.
4. In the "Fiscal Year" drop down list select the desired year.
5. Click on "Generate Report". The report is displayed (diagram 10.3).

**Diagram 10.3**



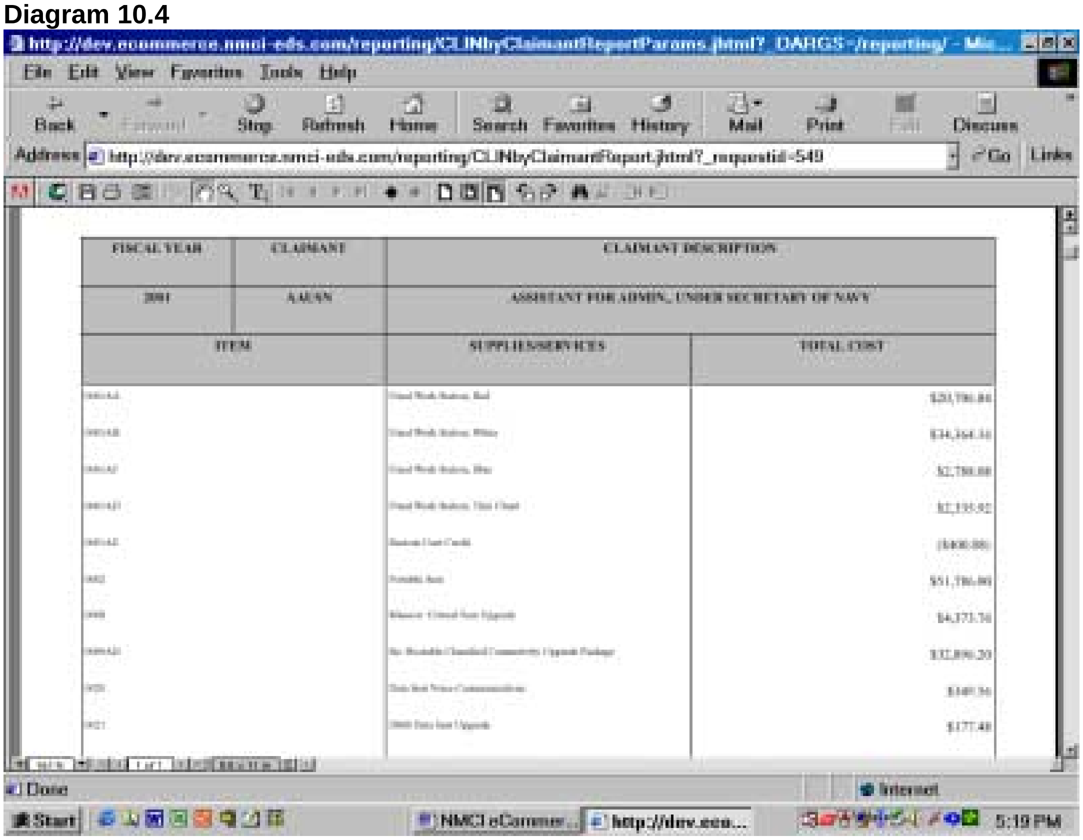

 

## CLIN by Claimant

This report lists all the CLINs, and the costs for a specific Claimant for a specific fiscal year.

1. In the left hand toolbar click on "Reporting". You are transferred to the "Reporting" page.
2. Click on "CLIN by Claimant". You are transferred to the "CLIN by CLAIMANT Report Parameters" page.
3. Select the desired Claimant from the "Claimant" drop down list.
4. Select the desired fiscal year from the "Fiscal Year" drop down list.
5. Click on "Generate Report". The report is displayed (diagram 10.4).

**Diagram 10.4**



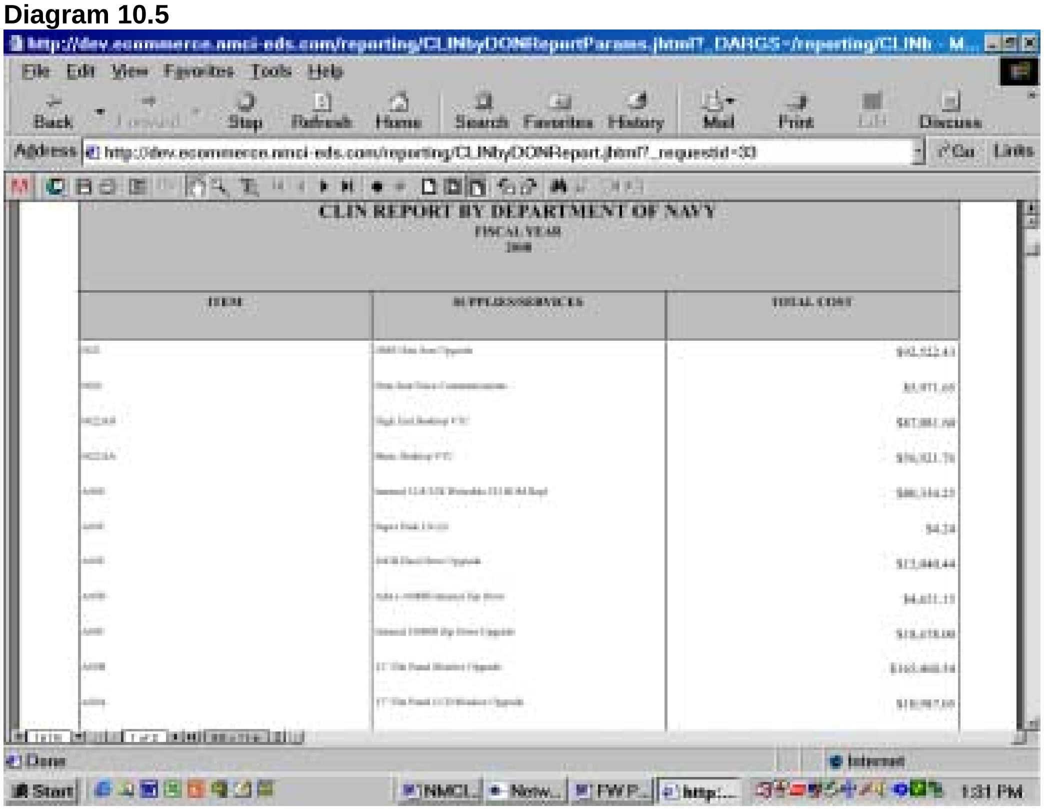

 

## CLIN by DON

This report lists all the CLINs, and the costs for a specific fiscal year.

1. In the left hand toolbar click on "Reporting". You are transferred to the "Reporting" page.
2. Click on "CLIN by DON". You are transferred to the "CLIN by DON Report Parameters" page.
3. Select the desired fiscal year from the "Fiscal Year:" drop down list.
4. Click on "Generate Report". The report is displayed (diagram 10.5).

**Diagram 10.5**



## Dollar Summary by Claimant

This report lists all the Claimants and their total order value for a specific fiscal year.

1. In the left hand toolbar click on "Reporting". You are transferred to the "Reporting" page.
2. Click on "Dollar Summary by Claimant". You are transferred to the "Claimant Summary Report Parameters" page.
3. Select the desired fiscal year from the "Fiscal Year:" drop down list.
4. Click on "Generate Report". The report is displayed (diagram 10.6).

**Diagram 10.6**

# Section 11: Preferences

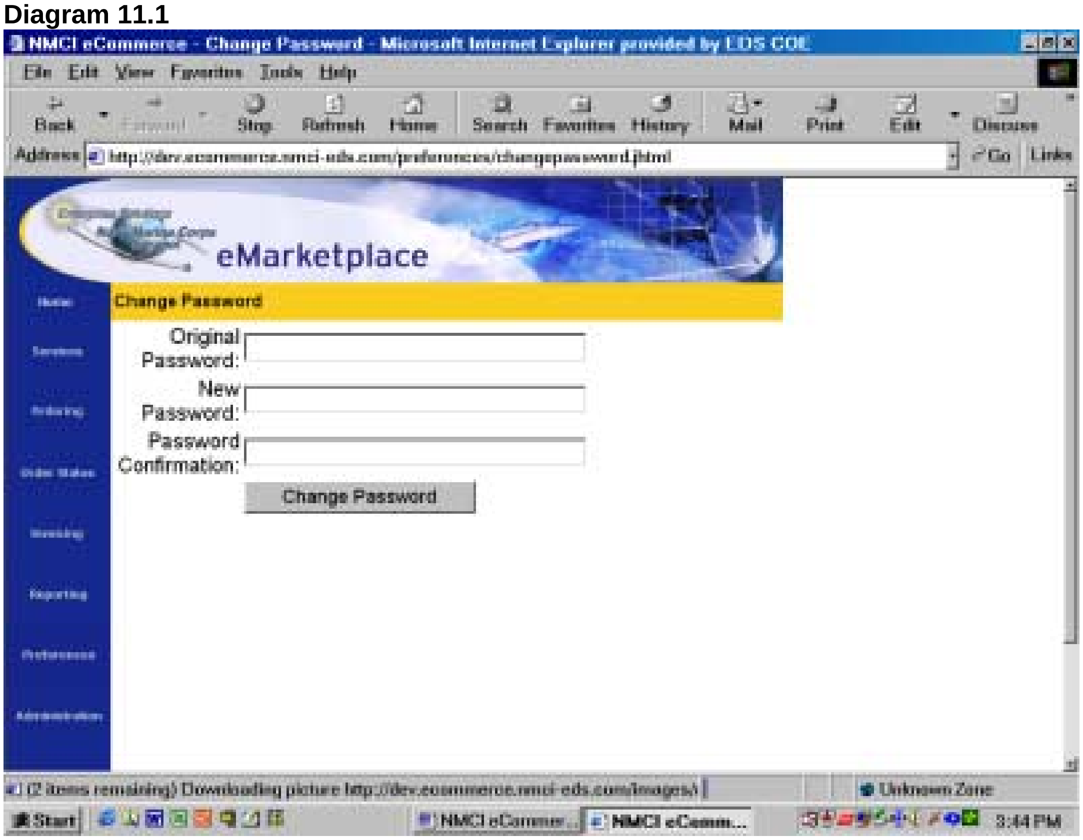
## Overview

This page enables a person to change both their password and Email settings.

### *Change Password*

1. In the left hand toolbar click on "Preferences". You are transferred to the "Preferences Menu".
2. Click on "Change Password". You are transferred to the "Change Password" page (diagram 11.1).

**Diagram 11.1**




3. Enter your existing password in the "Original Password:" text box.
4. Enter your new password in the "New Password:" text box.
5. Enter your new password a second time in the "Password Confirmation:" text box.
6. Click on "Change Password". You receive a message indicating that your password was successfully changed.

**Note:**

If you entered the wrong password in the "Original Password" text box the following error message appears:

Password not updated. The supplied original password does not match the current password in the profile.

If the "New Password" and "Confirmation Password" do not match the following error message appears:

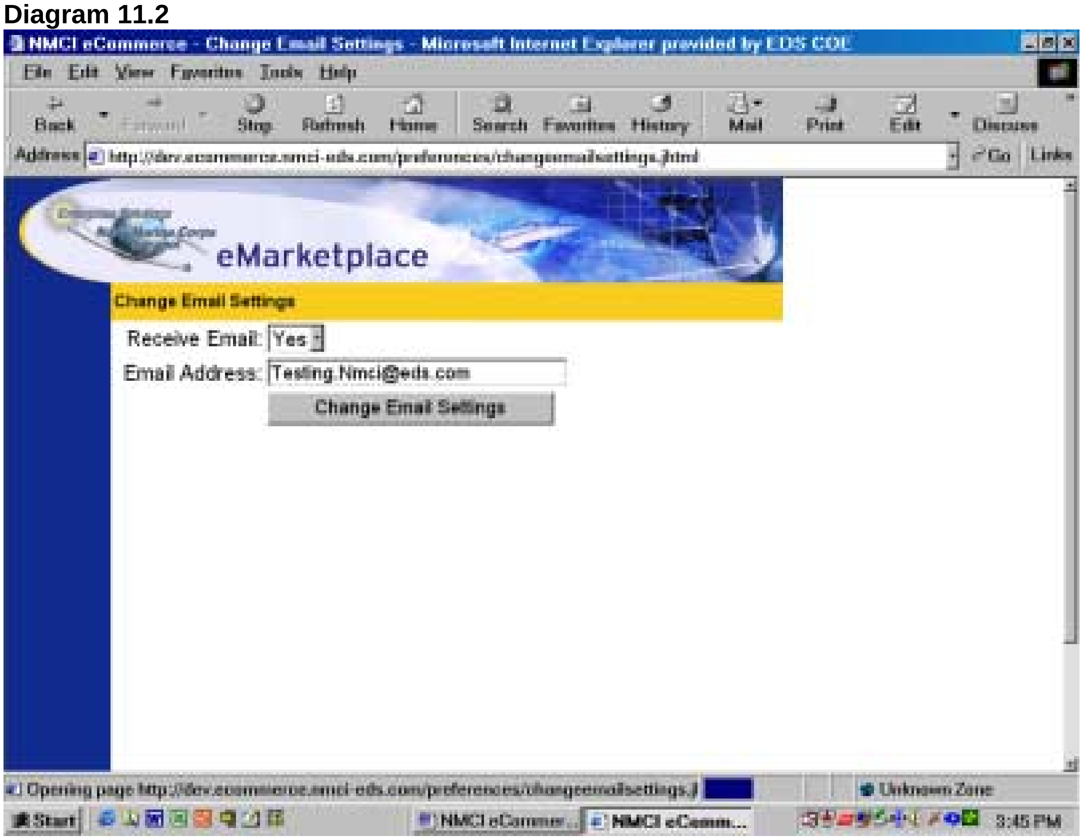
The supplied passwords do not match.

7. Click on "OK". You are returned to the "Preferences" page.

## *Change Email Settings*

1. In the left hand toolbar click on "Preferences". You are transferred to the "Preferences Menu".
2. Click on "Change Email Settings". You are transferred to the "Change Email Settings" page (diagram 11.2).

**Diagram 11.2**




3. Select either "yes" or "no" from the "Receive Email:" drop down list to indicate your preference.

**Note:**
If yes is selected the person (Login Id) will receive an email notification when an order is placed in their work list.

4. Enter your new Email address in the "Email Address:" text box.
5. Click on "Change Email Settings".  You receive a message indicating that your Email settings were successfully changed.
6. Click on "OK".  You are returned to the "Preferences" page.

# Section 12: Administration

## Overview

Administration is not covered in this guide.  Please contact an NMCI customer service representative for any questions you may have regarding system administration.  Please refer to section 14 of this document, "Help".

# Section 13: Log Off

## Overview

Please logoff the application before exiting your browser, or when you plan not to use the application for more than 30 minutes.

### *Logging Off the Application*

Click on "Log Off" in the left hand toolbar.  You are returned to the "Login" page.

# Section 14: Help

## Overview

The "NMCI Customer Service" page provides contact information in case you need to contact NMCI personnel regarding your experience with the NMCI website.

Most of the pages in the application contain a help "?" icon.  By clicking on the question mark an explanation of the page and step-by-step instructions are available for your review.

### *Customer Service Information*

1. In the left hand toolbar click on "Help".  You are transferred to the "NMCI Customer Service" page.
2. For problems or issues contact a customer service representative at the number listed.

# Section 15: Glossary of Terms

## Glossary of terms:

| Acronym | Definition | Description |
|---|---|---|
| | | |
| ***2275*** | A funding document created by the Comptroller and which provides the 2275 Line of Accounting and Document Control Number to be entered into the system. | The Comptroller funds orders using funds committed on the 2275. |
| ***2276*** | A funding document created by the SPAWAR that provides the 2276 Line of Accounting and Document Control Number to be entered into the system. | The SPAWAR funds orders using funds committed on the 2276. |
| ***ACO*** | A User Login Id type.  Administrative Contracting Officer | Final approver in the Command chain. |
| ***CIO*** | A User Login Id type.  Chief Information Officer | Claimant CIO or their designate.  If authority is delegated, Navy PEO-IT must be notified in writing. |
| ***CLIN*** | Contract Line Item Number | A NMCI service (for example, a Red Workstation). |
| ***Comptroller*** | A User Login Id type. | A Comptroller adds the 2275 line of accounting information to an order request. |
| ***COR*** | A User Login Id type.  Customer ?????? Representative. | A COR has final authority to approve or reject an invoice. |
| ***CTR*** | A User Login Id type.  Customer Technical Representative | The person who approves the order (1st level) |
| ***LOA*** | Line of accounting. | This term is used to represent a 2275 or 2276 funding request. Each contractual line item in an order must be associated with a line of accounting. A line of accounting is the combination of all of the fields indicated at the top of the Funding - Add Line |

| Acronym | Definition | Description |
|---|---|---|
| | | of Accounting page and the Cost Center. |
| ***NMCI*** | Navy Marine Corps Intranet | The intranet site where NMCI clients lease products and services. |
| ***Order*** | A request for products or services. | A request for products or services. that has not yet been approved by the ACO. When an order request has been approved by the ACO, it becomes a Task Order. |
| ***SF1449*** | Standard Form 1449 (PDF File) | A standard government form used for Task Orders. Solicitation/Contract/Order of Commercial Items. |
| ***SPAWAR*** | A User Login Id type. Space and Naval Warfare | Command level that assigns the 2276 line of accounting to an order request. |
| ***Task Order*** | A request for CLINs that has been approved by the ACO. | An order request that has been approved up the command chain and received ACO approval. |
| ***UIC*** | Unit Identification Code | Location (for example, a base) |
| ***User*** | A User Login Id type. Lowest Login Id type in the command chain. | A User can enter and approve orders. |