

MWI 2800.1

REVISION A

EFFECTIVE DATE: April 21, 2003

EXPIRATION DATE: April 21, 2003

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# **MARSHALL WORK INSTRUCTION**

**AD01**

## **SERVICE ORDER SYSTEM FOR INFORMATION TECHNOLOGY (IT) SMALL PURCHASES**

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<b>Service Order System for Information Technology (IT) Small Purchases</b>	<b>MWI 2800.1</b>	<b>Revision: A</b>
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**DOCUMENT HISTORY LOG**

<b>Status (Baseline/ Revision/ Canceled)</b>	<b>Document Revision</b>	<b>Effective Date</b>	<b>Description</b>
Baseline		12/3/02	With the retirement of the Automated Procurement Request System (APRS), this instruction describes an interim process/system for ordering IT small purchases through the Outsourcing Desktop Initiative for NASA (ODIN) and the Program Information Systems Mission Services (PrISMS) contracts.
Revision	A	4/21/03	Revised to change organization name from Information Services Department to Office of the Chief Information Officer. Revised URL for paragraph 4. Changed wording in 7.5 Users will be authorized by the CIO Budget Analyst Team Lead.

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## 1. PURPOSE

This Marshall Work Instruction (MWI) describes the steps to be followed by initiators, approving officials, and Office of the Chief Information Officer (CIO) resource analysts in the handling of service orders for Information Technology (IT) small purchases for the Outsourcing Desktop Initiative for NASA (ODIN) and Program Information Systems Mission Services (PrISMS) contracts. The guidance for using ODIN and PrISMS is described in MPD 2800.1, and the ODIN and PrISMS services are described in MPG 2800.2. For restrictions on using the Service Request System (SRS) for this process, see paragraph 7, "NOTES."

## 2. APPLICABILITY

This MWI applies to all MSFC or NASA employees, including contractors, who order IT small purchases through the PrISMS or ODIN contracts.

## 3. APPLICABLE DOCUMENTS

- 3.1 NPG 1441.1, "Records Retention Schedules"
- 3.2 MPD 2800.1, "Management of Information Technology Systems and Services at MSFC"
- 3.3 MPG 2800.2, "Marshall Information Technology Services"
- 3.4 MPG 5000.1, "Purchasing"
- 3.5 MWI 5113.1, "Governmentwide Commercial Purchase Card Operating Procedures"

## 4. REFERENCES

SRS Users Guide (<https://srs.msfc.nasa.gov/catalog/bin/home.asp>)

## 5. DEFINITIONS

5.1 Automated Procurement Request System (APRS). An electronic procurement request system used at MSFC which was retired at the end of Fiscal Year (FY) 2002 and replaced with the Integrated Financial Management (IFM) Program (IFMP) systems.

5.2 Funding Approver. The person responsible for managing the budget of an organization or a project by approving or not approving expenditures against available funding.

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5.3 IFM Bankcard System. A Web solution that is a Third party add-on for the IFM Core Financial Module. It works with electronic information available from any purchasing card provider that utilizes American Express, Master Card, or Visa.

5.4 Management Information Control System (MICS). A comprehensive, automated, online, Government-owned and contractor-operated computer system used to support the management of the PrISMS contract.

5.5 ODIN. A NASA-wide privatization initiative under which customers may purchase desktop computing services on a "per seat" basis for a monthly fee, with guaranteed service levels, performance characteristics, and technology refreshment cycles. Services under this contract include: desktop computing support, server and Local Area Network (LAN) management and operations, desktop hardware and software distribution and installation, trouble resolution and customer assistance, hardware installation, repair and upgrade, and a catalog of selected commercial upgrade components.

5.6 ODIN Catalog. A Web-based, online catalog available to Office of the CIO customers for ordering ODIN products and services.

5.7 ODIN Infrastructure Upgrade. An upgrade of the network, servers, or computers by utilizing ODIN services and/or products.

5.8 Primary Funding Approver. The Funding Approver designated for a specific organization.

5.9 PrISMS Small Purchases. PrISMS Automated Data Processing (ADP) purchases limited to \$100,000 or less. The PrISMS contract is an MSFC mission support services contract that provides IT services to both MSFC users and to NASA-wide customers under the direction of the Office of the CIO. Some services, such as IT procurements, are available to customers on a reimbursable basis.

5.10 SAP Financial Software. A commercial-off-the-shelf financial management software package chosen by NASA and customized to meet its core financial requirements.

5.11 SRS. An online, Web-based tool for ordering Center Operations-provided products and services.

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## 6. INSTRUCTIONS

Based on FY 2003 business rules defined by the MSFC Chief Financial Officer, funding for ODIN catalog purchases and PrISMS small purchases must be preestablished in SAP based on receipt of budget authority and will be used to validate funding for service orders.

### 6.1 Service Order Initiation

6.1.1 If the request is for an ODIN catalog service, the initiator should first access the ODIN catalog, select the desired items, and record the order number and value of the order. If the ODIN order is greater than \$2500, the initiator may use the SRS to initiate the request. For catalog orders less than \$2500, the initiator should use the IFMP bankcard system to procure the items. Refer to MWI 5113.1 for instructions.

6.1.2 If the request is for an ODIN infrastructure upgrade, the requester must first coordinate the requirements with ODIN through the Office of the CIO. Once the requirements are approved, and the Delivery Order Contracting Officer has issued a Delivery Order Modification to ODIN, ODIN will contact the requester to proceed with the order in SRS.

6.1.3 The initiator should choose the IT Small Purchases option in SRS and log on to the system. The initiator will be presented with screens which must be completed with the designated required information. The initiator may choose up to a maximum of seven management approvers by selecting their names in the system. The Primary Funding Approver will default to the recipient's organization. For ODIN orders, the order number from 6.1.1 or the description of the work and contract modification number from 6.1.2 must be entered into the appropriate field(s).

### 6.2 Management Approvals

Each management approver will be notified by e-mail of each pending approval. The e-mail will contain a Uniform Resource Locator (URL) that directly links the approver to the SRS approval screen. If the service order is disapproved by management, the initiator will receive an e-mail stating such. The initiator may check the routing status at any time by logging onto the SRS system and querying by the Service Order number.

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### 6.3 Funding Approvals

Each funding approver will be notified by e-mail of any pending approval. The e-mail contains a URL that directly links the approver to the SRS approval screen. SRS will route the service order to the Primary Funding Approver for this service based on the recipient's organization. The Primary Funding Approver may add up to two additional funding approvers. The system will validate funding availability. If the service order is disapproved, the initiator will receive an e-mail stating such. The initiator or funding approver may check the routing status at any time by logging onto the SRS system and querying by the Service Order number.

### 6.4 Office of the CIO/RS50 Approvals

When all management and funding approvals have been recorded, the service order is automatically routed to the appropriate Office of the CIO/RS50 personnel for final approval. The request will be forwarded to either ODIN or PrISMS, as appropriate, for execution. The initiator may check the status at any time by logging onto the SRS system and querying by the Service Order number.

### 6.5 Delivery of Order

The item(s) ordered will be delivered by ODIN or PrISMS to the recipient or as described on the service order. The Service order will be documented as "closed" in the SRS system.

## 7. NOTES

To automate this process, an extension of SRS has been developed with the following restrictions:

7.1 Due to the retirement of APRS, this interim system shall be the only mechanism for initiating ODIN Catalog-Infrastructure/PrISMS small purchases. (ODIN catalog orders of \$2500 or less must be procured using the IFMP bankcard system.) Justifications and waivers, as required by MPD 2800.1 and MWI 5113.1, shall apply. This interim system will be upgraded in the FY 2003 timeframe to allow for more robust routing and will eventually be replaced with an IFM solution.

7.2 Any IT small purchase requiring formal qualifications, such as flight hardware, must be worked with the Procurement Office in accordance with MPG 5000.1 "Purchasing."

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7.3 The maximum number of management approvers is limited to seven.

7.4 The Primary Funding Approver is based on the organizational code of the recipient. The Primary Funding Approver may add up to two additional Funding Approvers.

7.5 Users will be authorized by the CIO Budget Analyst Team Lead.

**8. SAFETY PRECAUTIONS AND WARNING NOTES**

None

**9. RECORDS**

Service order records and procurement records are maintained electronically in SRS, MICS, and the ODIN catalog. Records will be maintained for the duration of the PrISMS and ODIN contracts and will be deleted/destroyed 3 years after contract completion/termination in accordance with NPG 1441.1, Agency Filing Scheme #2400, Item 13, paragraph A. The record custodians are the Contracting Officer's Technical Representative (COTR) of the PrISMS contract and the Delivery Order Contracting Officer's Technical Representative (DOCOTR) for MSFC ODIN contract.

**10. PERSONNEL TRAINING AND CERTIFICATION**

None

**11. FLOW DIAGRAM**

(See Figure 1)

**12. CANCELLATION**

None

Original signed by  
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Director

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**Figure 1. FLOW DIAGRAM**

