Submitting an Order Request Using LSA's Online Purchasing System

Overview

LSA's Online Purchasing System is a web based system that allows departments to submit order requests, route through appropriate people for approval, and receive goods in one centralized system. Any staff person has the ability to request an order, however orders do not get processed by LSA Procurement until appropriate approvals have been received.

Process Overview

1. An LSA student, staff or faculty member completes the Purchase Request Form online.
2. The owner of the shortcode indicated on the form is notified by email that their approval is required for the purchase request, unless approval has been waived for one of the two following reasons:
   a. The owner of the shortcode has set a minimum order total for requiring approval.
   b. The owner of the shortcode is the one who submitted the form.

3. The financial admin of the shortcode is notified by email that their approval is required for this purchase request, unless approval has been waived for one of the two reasons identified above.
4. LSA Purchasing staff members responsible for handling orders are notified by email of the new purchase request submission.
5. A purchase request can be modified by the person who submitted it until the status of the order is no longer "Submitted".
6. Email preferences and default information can be set on the "My Profile" page.

Outline

Creating a New Order:

Navigation:

https://procurement.lsa.umich.edu/order/index/newform?dept=177000

| New Order | My Profile | My Orders | Group Orders | Site Info |

Online Purchasing System (OPS

Purchase Request Form

- All attached files must be pdf, doc, docx, xls, or xlsx.
- * Indicates a required field.

Your Information

Order Nickname: [   ]
Your Uniqname: **andersos**
* Your Name: [   ]
Your Phone: [   ]
* Your Email: [   ]
* Shortcode: [   ]
* PI Uniqname: [   ] (owner of shortcode)
PI Name: [   ]
Expedited Shipping: No ▼
Special Handling: --- ▼
Team #: [   ]
Course #: [   ]
Reference #: [   ]
Group Name: [   ]

Note: Expedited shipping requires faculty approval.

1. Order Nickname should be used as an identifier or reference to the items you're ordering.
2. Your Uniqname will self-populate.
3. Enter your name, phone number, and email in the indicated fields (see my profile for setting default info).

4. Enter a shortcode, the PI of the shortcode will automatically populate in the uniqname and name section. This is the first person assigned to approve the order. If another name should be chosen, you may overwrite the auto-populated name.

5. All other fields are optional, and can be used for individual notes or references.

Note: If choosing expedited shipping, the PI will be required to approve, regardless of dollar amount.

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Ship To

Saved Addresses:	2246 LSA Building ▼
* Faculty/Staff:	Sven Anderson
* Address:	500 S. State St
* Room #:	2246 * Building: LSA Building
* City:	Ann Arbor
* State:	MI
* ZIP:	48109-1382

6. Choose an address from the "Saved Addresses" dropdown menu.

7. If your address does not exist, please enter the required information.

8. Note: To have these fields prepopulate, click on the "My Profile" tab at the top of the screen, and enter this information. Go to page 9 for further "My Profile" instructions.

Vendor Information

Saved Vendors:	Tel Systems ▼
* Vendor Name:	Tel Systems
Address:	123 Main St
City:	Ann Arbor
State:	MI
ZIP:	48109-1234
* Vendor Phone:	734-761-0000
Web Address:	www.telsystemsusa.c
* Fax # or Email:	734-761-9776

9. Select a vendor from the "Saved Vendors" dropdown list.

10. If the vendor you need is not listed, please enter the minimum required information.

Items You Wish To Purchase

You can include a quote from the vendor or enter the items you wish to order individually in the table below (or both).

Quote from vendor or shopping cart (this must be word, excel, or pdf): [Browse…] No file selected.　　　a

OR

Line #	* Quantity	* Unit (ea, pkg, ct)	* Item #	* Item Description
1					b

[Add Item]

11. There are 2 ways to enter items you'd like to purchase.

    a. You can attach a quote from a vendor by selecting the "Browse" button, or

    b. You can enter individual items in the table on the webpage.

Note: You can copy multiple items from an Excel spreadsheet directly into the table by using copy and paste. Just be sure the columns in the excel spreadsheet align with the columns in the table.

URL	* Unit Price	* Total
	$ 0.00	$0.00

Shipping Fees: $ 0.00
* Order Total: $ 0.00

12.

12. If attaching a quote, enter in the "Order Total" amount in the box. This is a required field, and will not let you submit without this total. Individual lines do not require any information if a file is attached.

13. If a Sole Source form, or comparable quotes are relevant to the order, attach those forms here.

14. Include any additional information that may be relevant to the order in the Additional Notes section.

15. Once all relevant information has been included, click the "Submit Order" button. You may also save a draft of this order at any time.

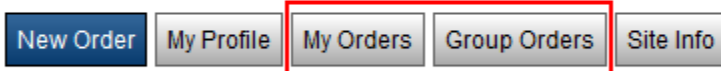To save an incomplete order to finish at another time click "Save Draft".

Save Draft

Submit Order

(Not Saved)

Contact lsa-procurement-staff@umich.edu with any questions you may have.

Reviewing Orders Submitted for Processing
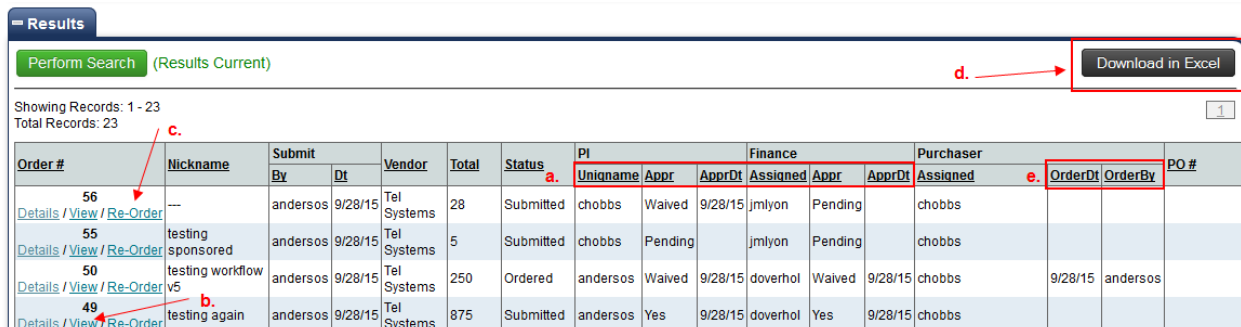
Once an order has been placed, there are two areas where you can track the status of your order: My Orders and Group Orders.

1.   My Orders will show you any orders you personally submitted. Group Orders will show you any orders you personally submitted, as well as any orders submitted by other individuals within an assigned group.

2. Groups are dynamically managed lists of people that share common responsibilities, space, or any other relevant interaction. Groups can be created and updated by either sending the name of a group and any members' uniqname that should be added or subtracted from that group, or by sending the name of an M-community group to lsa-procurement-staff@umich.edu. If an M-community group is used, any changes made to that group are automatically updated in the Purchasing system.

The results section shows the status of every order you have placed in the system.

a.   This shows the approval status of the order placed. The PI approver is your first approver, and shows you the uniqname, approval status, and date of approval. The Finance section shows the same information regarding the 2nd approver.

   i.   Note: If the status appears as "waived", it means that approval was not necessary due to dollar amount.

b. To view detailed information about an order, click on the View button. This will take you to the actual order, where you can find more information (outlined below).
c. By clicking the Re-Order button, you generate a new Order Form with all of the same information included. You can make changes to the initial order, or simply submit your order.
d. This report can be downloaded into Excel, so you can sort or manipulate the data.
e. Lastly, the OrderDt and OrderBy shows who placed the order and when it was placed.

View Order:

When you click on the "View" button on the My Orders page, you are taken to the screen above.

a. Order Status will update you on where your order currently stands. This could be submitted, processing, ordered, denied or cancelled.
b. Approvals let you know who approved the order, and when.
c. PO#'s, Confirmation #'s, and Tracking #'s are updated as Purchaser's receive the relevant information.

Comments section allows the Purchaser to provide updates to the order that may be helpful. They can also email comments directly to you, if they are urgent. Any person involved with the order may add comments (Orderer, Approver, and Purchaser).

My Profile

When clicking on the "My Profile" tab at the top of the order page, you get three areas where you can enter default information. To change information in those areas, click the "Edit" button.
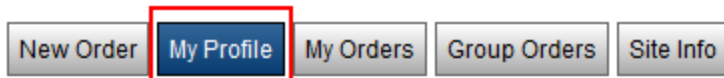
My Profile

Default Information

Your Name:

Your Phone:

Your Email:

Faculty Uniqname: (or owner of shortcode)

Faculty Name:

Edit

Default Shipping Information

Ship To (Name):

Address:

Room #: Building:

City:

State:

ZIP:

Edit

Notification Settings

Would you like to receive email notifications for the following events?

Faculty Approves Order: **No**

Finance Admin Approves Order: **No**

Order Status Changed to Processing: **No**

Note: You will always receive an email when your items have been ordered.

Edit

Default Information

My Profile

Default Information

Your Name: [_____]

Your Phone: [_____]

Your Email: [_____]

Faculty Uniqname: [_____] (or owner of shortcode)

Faculty Name: [_____]

[Save Changes] [Cancel Changes]

Any information entered in this field will automatically populate on a new order form each time you log into the system. Enter the relevant information, and click Save Changes. You can edit this information at any time.

Note: Entering a faculty uniqname and name will auto populate on the new order form, but when an active shortcode is entered, it will overwrite that information with the Project Director of that shortcode.

Shipping Address

Default Shipping Information

Saved Addresses: [_____▼]

Ship To (Name): [_____]

Address: [_____]

Room #: [_____] Building: [_____]

City: [_____]

State: [____]

ZIP: [_____]

[Save Changes] [Cancel Changes]

Select an address from the Saved Addresses drop down, and this will automatically prepopulate each new order. If the appropriate address does not exist, you may enter the appropriate information in the correct fields.

Please include as much detail as possible when creating a new address.

Notification Settings

The notification settings allow you to choose when you would like to receive emails regarding your orders. You can choose three options:

1. Faculty Approves Order: This will send an email once the First level approver has approved the order.
2. Finance Admin Approves Order: This will send an email notification once the Finance person has approved the order.
3. Order Status Changed to Processing: This will send an email notification once the Purchaser has started processing the order.
4. The last section allows you to automatically include a person or group to receive email notifications when your order has arrived.