Approving 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. When an order has been placed that requires approval, you will receive an email indicating an Order Request requires your approval.
2. Within the email, the approver can view the order (and any attachments) and approve it right in the email, or click on a link to view the order within the Purchasing System.
3. The approver can also change the shortcode assigned to the order, or make any other necessary changes before approving.
4. If changes are made to an order, there is an option to reset the workflow approval. This would be for the 2nd approver to reroute the changes to the initial approver (if necessary).
5. Once the approval link is clicked in the email, or the Approve order button has been clicked, the order has been approved.

When an order requires approval, the Approver will receive an email from "LSA Procurement Group" with the heading "Purchase Request: Approval Required".

1. The approver can click on this link to view the order in the Purchasing System.
2. The approver can click this link to approve the order. Once this link is clicked, no further action is needed.
3. If the approver has multiple orders that need to be reviewed and approved, they can click this link to view all.

1. **The next section of the email shows all information related to the order request.**

ORDER #54

<u>ORDER INFORMATION</u>

Order Submitted By: Christine (chobbs)
Submitter Phone: 764-3601
Submitter Email: chobbs@umich.edu
Shortcode: 100056
Owner of Shortcode: andersos

<u>SHIPPING INFORMATION</u>

Janet
519 S. State Street
G353 Mason Hall
Ann Arbor Mi 48109-____

<u>VENDOR INFORMATION</u>

Name: Marketsite
Address:
  500 S. State Street
  Ann Arbor Mi 48109-____
Phone: 7347643601
Fax Number: chobbs@umich.edu

<u>ITEMS ORDERED</u>

ITEM 1
  Quantity: 1
  Unit: EA
  Item #: 12345
  Item Description: Pens
  Unit Price: $25.00
  Total Price: $25.00

<u>ORDER TOTAL</u>

Expedited Shipping: Yes
Shipping Fees: $0.00
Order Total: $25.00

Approve this order:
https://me-web1-dev.engin.umich.edu/order/index/approve?dept=171200&id=54

The approver can review all relevant information about the Order, including any attachments that may have been included. Towards the bottom of the email, there is another link for the approver to Approve the order.

2. If the approver would like to review the order request in the system, they can click on the first link.

The approver can review the entire order, and click the "Approve Order" button

They can also add and email comments to the Requestor:

The Approver can also change the shortcode being used in the order request:

Your Information

Order Nickname: **Test**

Your Uniqname: **chobbs**

Your Name: **Christine**

Your Phone: **764-3601**

Your Email: **chobbs@umich.edu**

* Shortcode: **100056 (LSA IT - CUSTOMER SERVICES)** Edit

Manager Uniqname: **andersos** (owner of shortcode)

Manager Name: **Sven Anderson**

Expedited Shipping: **Yes**

Special Handling

Reference #:

Group Name:

Note: Expedited shipping requires faculty approval.