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 Manager of the requestor 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 Manager has set a minimum order total for requiring approval.
   b. The Manager 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 following 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 Pg. 2
Reviewing Orders Submitted for Processing Pg. 6
Setup My Profile Pg. 9
Creating a New Order:

Navigation:

https://procurement.lsa.umich.edu/order/index/newform?dept=170000

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.

4. Enter a shortcode, and the uniqname of your manager. The manager’s name will automatically populate in the name section. This is the first person assigned to approve the order.

Note: If choosing expedited shipping, the Manager will be required to approve, regardless of dollar amount.
5. Choose an address from the “Saved Addresses” dropdown menu.

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

7. 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.

8. Select a vendor from the “Saved Vendors” dropdown list.

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

10. If you do not know or care which vendor is used,
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 Excel 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 (or use template provided).

12. If attaching a quote, enter an amount in the “Order Total” 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.

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 sending the name of the group, and any members’ uniqname that should be added or subtracted from the group to lsa-procurement-staff@umich.edu. You can also request an M-Community group be used.

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 Manager’s approval, 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 change one or two things, 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.

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

<table>
<thead>
<tr>
<th>Order #</th>
<th>50</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order Status</td>
<td><strong>Ordered</strong> (on 2015-09-28 by andersos)</td>
</tr>
<tr>
<td>Submit D</td>
<td>9/28/15 10:59 AM</td>
</tr>
<tr>
<td>Manager Approval</td>
<td>Waived (9/28/15 by system)</td>
</tr>
<tr>
<td>Finance Approval</td>
<td>Waived (9/28/15 by doverhol)</td>
</tr>
<tr>
<td>Finance Admin</td>
<td>doverhol</td>
</tr>
<tr>
<td>Order Assigned To</td>
<td>chobbs</td>
</tr>
<tr>
<td>PO #</td>
<td>3001234567</td>
</tr>
<tr>
<td>Confirmation #</td>
<td>TEL25467</td>
</tr>
<tr>
<td>Tracking #</td>
<td>UPS10034567</td>
</tr>
</tbody>
</table>

*Your purchase request has been ordered. For questions about your order please email chobbs@umich.edu.*
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.

**Default Information**

- Your Name:
- Your Phone:
- Your Email:
- Faculty Uniqname: (or owner of shortcode)
- Faculty Name:

**Default Shipping Information**

- Ship To (Name):
- Address:
- Room #: Building:
- City:
- State:
- ZIP:

**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.
Default Information

My Profile

**Default Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Name</td>
<td>Your name will automatically populate on a new order form.</td>
</tr>
<tr>
<td>Your Phone</td>
<td>Your phone number will automatically populate on a new order form.</td>
</tr>
<tr>
<td>Your Email</td>
<td>Your email address will automatically populate on a new order form.</td>
</tr>
<tr>
<td>Faculty Uniqname</td>
<td>(or owner of shortcode)</td>
</tr>
<tr>
<td>Faculty Name</td>
<td></td>
</tr>
</tbody>
</table>

Note: Entering a faculty uniqname and name will auto populate on the new order form as the Manager uniqname and Manager Name.

**Shipping Address**

**Default Shipping Information**

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.

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.

Save Changes  Cancel Changes