How To...Online Purchasing System (OPS)

https://mse.engin.umich.edu/internal/howto/

(updated May 2020)

When to use OPS? For ALL order request(s) OR invoice to be paid OR service / maintenance.

All who have a UM uniqname and kerberos password can use OPS.

Read Site Info [screenshot below] to understand OPS system process

Online Purchasing System (OPS)

Click OPS link > https://me-web2.engin.umich.edu/order/index/profile?dept=221800

• Modify My Profile [see screenshot] adding your contact information, shipping location, etc., to reduce redundant data entry of relevant information for all future orders

• Past orders can be found by clicking My Orders [see screenshot] and ability to reorder previous orders to reduce redundant data entry

• or select New Order [screenshot above] to create a new order

• Ability to create Group Orders where each member can view all lab group orders searching Advisor uniqname

Online Purchasing System (OPS)

Purchase Request Form

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

Your Information

Order Nickname: _______________________
Your Uniqname: dja
* Your Name: Debra Johnson
* Your Phone: 734-763-9425
* Your Email: dja@umich.edu
* Shortcode: _______________________
* Advisor_Faculty Uniqname: djschar (owner of shortcode)
Advisor_Faculty Name: Todd Richardson
Expected Shipping: No

Ship To

Saved Addresses:
Dow

Requester: Debra Johnson
Phone/Email: dja@umich.edu
Address: 2300 Hayward Street
Room #: 2142
Building: Dow
City: Ann Arbor
State: MI
ZIP: 48109-2136
Modify My Profile adding your phone, email, shortcode, shipping address and email notifications, to avoid redundant data entry for all future orders.

**Your Information**

Order Nickname: **MSE hand sanitizer**
Your Uniqname: **dia**
Your Name: **Debra Johnson**
Your Phone: **734-763-9425**
Your Email: **dia@umich.edu**
Shortcode: **103670 (MSE-N/S INST/DEPT RES)**
Advisor_Faculty Uniqname: **dtrichar** (owner of shortcode)
Advisor_Faculty Name: **Todd Richardson**
Expedited Shipping: **No**
Type of Order:
Order Category:
Special Handling
Also notify this person when package(s) arrive: 

**(uniqname or MCommunity group)**

**Note:** Expedited shipping requires faculty approval.
Online Purchasing System (OPS)

My Profile

**Default Information**

Your Name: **Debra Johnson**  
Your Phone: **734-763-9425**  
Your Email: **dla@umich.edu**  
Faculty Uniqname: **dtrichar** (or owner of shortcode)  
Faculty Name: **Todd Richardson**

**Default Shipping Information**

Ship To (Name): **Debra Johnson**  
Email/Phone: **dla@umich.edu**  
Address: **2300 Hayward Street**  
Room #: **2142 Building: Dow**  
City: **Ann Arbor**  
State: **MI**  
ZIP: **48109-2136**
SHIP TO

The Ship To address MUST have the contact name of who will pick up the goods when shipped to UM, along with Room # and Building where the equipment\ items will be placed in your lab or office.
VENDOR INFORMATION

1. ONLY one vendor per OPS request
2. Recommend contacting vendor for minimum order requirements, to reduce order processing delays
3. Recommend contacting vendor, asking for a quote to obtain current pricing and item availability, to reduce order processing delays

ITEMS YOU WISH TO PURCHASE

1. IF items from Marketsite catalog, then Requester shops, creates cart, assigns cart to sfellers@umich.edu (Shelley Fellers)
   a) upload screenshot of final cart into a new OPS request
   b) enter shortcode into your OPS request
   c) Enter the cart total into your OPS request
   d) Type ‘cart attached’ in your OPS request

5/20/2020
2. IF equipment / item(s) total > or = $10k you are required to attach the Sole Source Form (see screenshot)
   a) Upload form after Advisor and Lab Tech signatures on completed form
   b) a quote from the vendor (see screenshot)
   c) and at least 1 comparable quote from a second vendor (if possible) (see screenshot)
   d) Then click Submit
   e) Then Sole Source Form is forwarded to Department Manager for review, approval, signature, by the MSE Purchasing Staff
   f) Then a requisition along with all above documents will be routed to Procurement Services (PS) by MSE Purchasing Staff, for PS review/approval process

3. ALL other items < $10k should be typed in item description (see screenshot) with complete details of what you want ordered
   a) upload all documents (quotes, justifications, approvals, etc.) relevant to your request
   b) then click submit

**Items You Wish To Purchase**

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

Quote from vendor, shopping cart or invoice (this must be word, excel, or pdf): Download

<table>
<thead>
<tr>
<th>Line #</th>
<th>Quantity</th>
<th>Unit (ea, pkg, ct)</th>
<th>Item #</th>
<th>Item Description</th>
<th>URL</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>lat</td>
<td></td>
<td>see cart</td>
<td></td>
<td>$50.01</td>
<td>$50.01</td>
</tr>
</tbody>
</table>

Shipping Fees: $0.00
Order Total: $50.01

If your order total is greater than or equal to $10,000.00 you are required to attach the sole source form, a quote from the vendor, and at least 1 comparable quote (if possible).

**Sole Source Form:** None
Comparative Quote 1: None
Comparative Quote 2: None
Comparative Quote 3: None

**COMMENTS**

Comments...share all information that the Purchaser may need to know about your order; include request for expedited shipping if needed.

OR
Comments can be used to send messages to any relevant person listed on this order, so Do NOT create a new OPS request to make changes to an existing OPS request; use the Comments in your OPS request to communicate any changes needed. create a comment, save, then click the envelope by comment to email to one or more recipients. Please DO NOT email messages outside of the OPS system

OTHER ATTACHMENTS

1. All other attachments to be uploaded in this area
2. Orders and attachments stored indefinitely on server for future reference

SAVE DRAFT OR SUBMIT ORDER

1. after all sections of order are complete and you click Submit Order, then the owner of the shortcode (Faculty or Staff) is notified by email that their approval is required for a 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.
2. A purchase request can be modified by the person who submitted it until the status of the order is no longer "Submitted".

3. Once the status has changed, the assigned purchasing staff member must be contacted thru Comments to make any changes to the order.

4. Order request will route to Advisor / Faculty / Manager to approve order and shortcode. In that notification there will be details of the order as well as attachments. Approver can click the link to review and approve, or modify the shortcode if necessary.

5. Order request will route to financial staff to approve, reviewing for budgetary compliance and to make sure that funds are available and item allowed for your project.

6. After approvals, request will route to purchasing staff to assign orders: Marketsite requests to Shelley, computer related requests to Kevin Worth, all other requests to Lourdes Jorgensen to process.

7. Requester will receive messages from OPS regarding progress. My Profile can be set to receive notifications or Requester can check their OPS request at any time.

8. To view more detailed information about an order click on the "View" link in the "Order #" column in OPS.

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**Package Management**

MSE is asking the OPS Requester to utilize OPS# related to your package delivered and click the green button ‘packages picked up’ [screenshot below] after your package has arrived in your lab or office, and system adds a comment with the date/time that a package was picked up.

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**Package Management**

**Actions:**

- **Package Received** - (adds a package to the list below, adds a comment, notifies the requester a package is ready to be picked up)
- **Packages Picked Up** - (marks all received packages in the below list as picked up)

**Package List:**

No packages have been added yet.

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See this website for more How To documents

[https://mse.engin.umich.edu/internal/howto/](https://mse.engin.umich.edu/internal/howto/)