

HOW TO Order Supplies, Equipment, Services

[(updates periodically) updated June 2026]

Getting started > Let's determine WHO the supplier will be, before logging into the Online Purchasing System (OPS) to submit a purchase request.

1) **SUPPLIERS**

a) **Internal Service Providers**

Internal Service Providers from UM campus business units provide goods & services to other university units & departments. Using internal service providers can save time & money & since the transaction is between two university units, UM Procurement Services (Procurement) review & approval is unnecessary. Orders can be placed online or by phone using a shortcode.

REQUIREMENT - When using campus suppliers, purchasing onsite or by phone, or paying with a shortcode, always obtain a receipt for the purchase. Email the receipt, shortcode, and the name of your professor/faculty to the Financial Specialist (jorgenl@umich.edu).

Website > <http://procurement.umich.edu/buying/buying-methods/internal-service-providers>

The Computer Showcase on the UM campus locations offers great academic discounts. Browse the product catalog to see a wide selection of products & prices. They offer amazing deals on products, including Microsoft software. Buy from Showcase with a shortcode & an ordering form that requires a hardcopy signature; using the new digital authorization system, & receive a receipt.

Website > <https://computershowcase.umich.edu/>

b) **Contracted / Strategic Suppliers**

The UM holds purchasing contracts with many suppliers for thousands of items, including lab supplies, chemicals, office supplies, food/beverages, small-package and freight shipments, & more. Procurement encourages all purchases for contracted items to be placed using **M-Marketsite** (suppliers with a catalog) or **Strategic Suppliers**, which utilizes our negotiated pricing and, in many cases, free shipping:

i) **M-Marketsite+**

- The order will be placed using a **Purchase Order (PO)**, not a PCard. *POs offer the university the best legal and financial protections; they are the preferred method for ordering goods and services.*
- An OPS request is required (instructions below)
- Suppliers with a Catalog Website > <https://wolverineaccess.umich.edu/page/all/m-marketsite-browse-only>
 - **Amazon Business** – Go to M-Marketsite+ (<https://wolverineaccess.umich.edu/>). This Amazon site will let you know whether an item is UM-restricted. *Items labeled as "RESTRICTED" in YELLOW are not hard stops. This messaging is intended to raise awareness about items that can be purchased through Marketsite+ catalogs or are subject to the restrictions and approvals list. If your Advisor and the department feel comfortable with a restricted item, they can proceed with*

the purchase without the approval from Procurement.”

(Amazon [Account Guidelines and Features](#)) You cannot purchase items on the Restricted Purchases and Special Approvals (see PDF doc. in website) list, items not considered an allowable business expense (unless specifically indicated), and goods available through a university contract or an internal service provider.

If Amazon is the only supplier that sells the (blocked, red-highlighted) restricted product, we can request approval from Procurement to make the purchase.

ii) **Strategic Suppliers**

- The order will be placed using a PO, not a PCard.
- Procurement Website > <https://procurement.umich.edu/u-m-employees/purchasing/advanced-supplier-search/>
- **Find Products and Services** that include lab supplies, computers and office supplies, transportation services, and catering services—search suppliers by commodity and business type, including Michigan-based, green products.
- When using strategic suppliers for **Hosting**, visit the website mentioned above and select **Event Services**. Then, the Requester needs to reconcile/upload the restaurant receipt at the Shared Services Center (SSC). Business meals are those taken with university guests during which focused business discussions occur. Business meal expenses, including non-alcoholic beverages and tips, should not exceed the maximum per-person allowances of \$30 for breakfast, \$30 for lunch, and \$70 for dinner. Alcoholic drinks are limited to \$20 per person, per event, served at dinner only. Alcohol is not permitted for recruiting activities. Alcohol must be charged to non-General, discretionary funds, or may be claimed as a personal expense.
 - **Reconciliations** Website > <https://ssc.umich.edu/accounting-services/reconciliations/>
 - **Hosting policy** Website > <https://procurement.umich.edu/u-m-employees/travel-expense-reporting/expense-reporting/>

c) **External Suppliers**

- External Suppliers require payment using one of the following:
 - PCard (Procurement Card, UM’s credit card) – Used when the supplier does not accept POs.
 - PO
- OPS required (instructions below) when purchasing from an external supplier
- Ask the supplier(s) for a **Quote** before creating an OPS request (the Quote must match OPS)
- A PO must pay the supplier for their services if **lab equipment** needs to be **repaired in-house or shipped out for repair**.

2) **ONLINE PURCHASING SYSTEM (OPS)**

OPS is required for ALL service/maintenance, orders (Marketsite orders, when paying with POs or PCard), requests, or, in rare instances, invoices to be paid. OPS is used to obtain approvals before orders are placed and to record orders.

All who have a UM unickname & kerberos password can use OPS. Research teams can create "groups" where each member can view all lab group orders.

The OPS system features built-in shortcuts to reduce redundant data entry, allowing the Requester to enter default information (e.g., shipping details, contact information) and modify notifications. OPS can

also create **Group Orders** where each member can view all lab group orders by searching the professor/faculty's unqname

Use this link to submit purchase requests.

OPS Website > <https://deptapps.engin.umich.edu/ops/purchaser/orders?dept=221800>

- Create/update OPS **Profile** Website > <https://me-web2.engin.umich.edu/order/index/profile?dept=221800>.
 - Modify **My Profile**, adding your contact information, shipping location, etc., to reduce redundant data entry of relevant information for all future orders.
- **Training Video** Website > <https://sites.google.com/umich.edu/opstoolbox/ops-2-0/training-materials>
- **CoE Toolbox** (for Purchasing, Travel, and Expense) Website > <https://sites.google.com/umich.edu/opstoolbox/home-page>

a) Past orders can be accessed by clicking “**My Orders**,” and the ability to reorder previous orders eliminates the need for redundant data entry.

b) When creating a **New Order**, include as much detailed information as possible, product information, weblink, discount codes, etc.

- Contact suppliers to determine minimum order requirements and obtain quotes to ensure current, correct pricing and item availability before submitting an OPS order. It is impossible to revise a PO once it has been created. If the PO is incorrect, it must be canceled and re-entered, which will delay processing of the OPS order.
- Only one (1) supplier in Supplier Information per OPS order. And the same supplier for all of the following:
 - Supplier Information
 - Order Items
 - URL
 - Quote
- Combine orders into one OPS request if the OPS items are requested on the same day, using the same shortcode for the supplier.
- **Splitting orders to avoid a total over \$50,000 is not allowed.**
- **Employees are not authorized to sign purchasing contracts or agreements on behalf of the University of Michigan (U-M). Procurement must review and sign all contracts and agreements between a supplier and UM.** For requests to create, amend, or renew a contract, or to request a signature from Procurement, see [Using the Contract Request Form](#).

Procurement has transitioned all sourcing and contracting requests from TDx to Marketsite+, enhancing both the customer experience and reporting capabilities. In Marketsite+, departments can now track their contracting and sourcing requests from start to finish. This includes the

- *buyer's actions*
- *contract construction*
- *final signature*

The same process applies to sourcing events—departments will have full visibility from initiation to completion.

3) SPECIAL CASES

a) Orders between \$10K - \$50K

Procurement reviews orders submitted between \$10,000 and \$50,000 to determine whether departments have conducted some degree of due diligence by reviewing the supporting documents provided. Acceptable forms of supporting documentation include, but are not limited to, the following:

- Quotes from other suppliers
- Screenshots of web searches
- Invoices/similar purchase history
- Comparable pricing for other institutions
- Relevant pages out of an awarded grant (could be a combination of the grant application and Notice of Award)
- URL or Link to product
- Relevant materials displaying the sponsor's requirements for a specific supplier

Procurement may need a short statement for the bulleted items below, so they have something in writing for Audits or FOIA requests. U-M is a public institution funded largely by taxpayer money, and Procurement is tasked with ensuring units are compliant (and has to keep documentation on all purchases).

- If you researched other suppliers, provide the supplier's name(s)
- Some justification of why you chose the supplier of your choice
- If this is the only supplier you considered, give the reason (i.e., did the unit work with them before, did someone recommend them, are they the only vendor providing specialized services, etc.)

b) Orders \$50K and Greater (see MSE's How-To order > \$50K and Sole Source)

Website > <https://procurement.umich.edu/u-m-employees/purchasing/sourcing/>

The University of Michigan [Standard Practice Guide, SPG 507.01](#), requires that all transactions exceeding \$50,000 **be competitively bid** (unless sole source approved – **Procurement will make the final assessment of the validity of a sole source justification** – and the revised Sole Source Justification form should be used).

[For transactions of \\$50,000 or more](#), units should submit a [Request for Competitive Bid \(Sourcing Event\) Form](#) to Procurement Services via Marketsite+ as soon as the need is known, so they can begin research for the sourcing event. (CoE does not provide procurement or Marketsite+ access beyond "browse" to faculty.)

- Procurement can determine whether a contract is needed, whether it should be bid out to multiple suppliers, or whether it can be processed as a sole-source contract.
- **Tariff:** Procurement works with suppliers and UM's customs broker, Baker Logistics, to determine whether Procurement can process the order as DAP, which gives us better leverage on the tariff charges for international orders. In some cases, a US Supplier will charge a tariff fee because part of the order is coming from out of the country. (see additional information below)
- **Orders of \$100K or more** are routed to the department's fiscal approver (e.g., Jeffrey Raidl of [Sponsored Programs](#)).
- If using **Fund Code 20000, 25000, or 10000, along with a cost share**, requisitions will be routed to the department's fiscal approver.

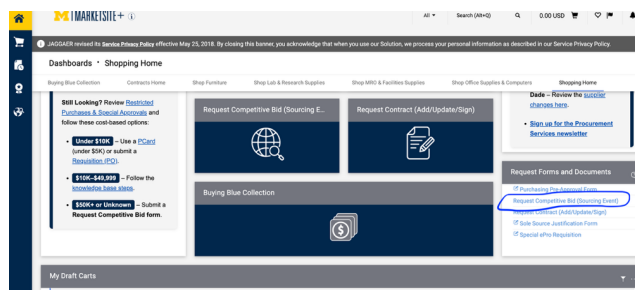
- **Projected completion date for POs:** Suppliers are typically allotted one to one and a half weeks to submit responses to the RFQ. While some suppliers respond promptly, others may require additional time, particularly if they are negotiating terms or operating internationally. These circumstances can occasionally delay issuance of a PO.
- Requests and requisitions are processed by [Procurement](#) in the order they are received. Procurement does not review requisitions until the workflow has been completed; Procurement is the final stop. Procurement approves the requisition, and a PO is automatically generated. If no Buyer/Procurement Agent is assigned to the requisition, it is sent to triage.
- **[Equipment Purchases:](#)** Once the Buyer/Procurement Agent receives the requisition for equipment purchases, they will send a formal [Request for Quotation](#) to the supplier.

Request for Quotation (RFQ) vs Quote

- **RFQ:** The supplier must complete this form and submit a bid response. This generally takes a week or so for the supplier to respond. The online RFQ process is how suppliers submit their bid responses and information to UM. The RFQ document contains the UM terms and conditions for products, installation, indemnity, insurance, and other relevant details.
- **Quote:** The supplier budget quote sent to the department is not used to issue a PO. This document settles the business issues related to the transaction between the University and the supplier.

c) **Requests for bids and other services:** Go to Marketsite+ to request Procurement assistance for any of the following (you may request to have your PI added to the form so your PI may view and amend the record before it is submitted):

- [Request Competitive Bid](#) form (**required** for all transactions of \$50K and greater)
- [Create contract](#)
- [Amend contract](#)
- [Renew contract](#)
- Request a signature for any document



For information on communication options in Marketsite+ for Sourcing and Contracting requests, go to this [link](#).

d) **Sole Source Justification (SSJ) process:** When submitting a request to deviate from the standard Competitive Bid Process, [complete the Sole Source Justification Form](#).

Procurement will make the final assessment of the validity of a sole source justification.

Sole source purchases are allowed only when one or more of the following circumstances apply:

- The item is available only from a single source
- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation
- The federal awarding agency or pass-through entity expressly authorizes non-competitive proposals in response to a written request from the non-federal entity.
- Competition is deemed inadequate after several sources are consulted.

Download form, and Completing the Sole Source Justification Form

Website> <https://teamdynamix.umich.edu/TDClient/68/Portal/KB/ArticleDet?ID=11393>

Complete the SSJ form and secure your faculty member’s signature. Once signed, attach the SSJ to your OPS ticket for processing. After OPS approval, the Purchaser will promptly forward the signed SSJ to the Lead Department Administrator for final signature.

<p>Basic Information</p>	<ul style="list-style-type: none"> • Order Nickname: Add “URGENT” if your purchase request is urgent. • Business Purpose: Provide a clear and specific business purpose (“For research” is not specific). A necessary expense is one for which there exists a clear business purpose and is within University expense policy limitations. The business purpose must support or advance the goals, objectives and mission of the university, and adequately describe the expense as a necessary, reasonable and appropriate business expense for the University. The specific business purpose of each transaction should be clearly stated on expense submissions, explaining why the University has incurred the expense. The “why” should include the primary reason for the expense. <p>Account Codes, for example:</p> <ul style="list-style-type: none"> • 614440 - Office Supplies: cannot use shortcodes with Project Grant number that start with “F”, “M”, or “R” • 616450 – Services (“Serv Of Others (Non-Consultant)”) - To record costs for payments made to agencies or individuals for non-consulting services. • 614000 - Equipment greater than \$5,000: To record capital equipment with an original cost of \$5k or more and a useful life of one year or more. Most items \$5k & greater are marked as ‘equipment’ and all equipment must be tracked; room & building where equipment will be housed is required. • 614060 - Equip Fabrication (Used for Sponsored Funds Only): To record the <u>non-labor cost of fabrications that is estimated to exceed \$5k (at the end of the project)</u>. A set of separate chartfield is established to accumulate all non-labor costs for eventual capitalization to the one item on the equipment inventory. • 623812 - Hosting (TROHS): To record costs of hosting where food and/or beverage is provided to an identifiable list of attendees. Per Audit, use this for meeting snacks and beverage or to record hosting Refreshments/Snacks, and add a comment that the expense is "for multiple or future meetings with unknown attendees".
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	<p>Special Handling: For hazardous materials, contact EHS for questions or guidance, go EHS's website, and click Research and Clinical tab to find your item, such as:</p> <ul style="list-style-type: none"> • Chemical - Routine hazardous chemical orders usually do not require explicit pre-approval from Procurement, but you must purchase via approved channels (i.e., eProcurement systems include Marketsite and eProReq). eProcurement connects buying activity with inventory management (especially for chemicals/hazardous materials). Potentially dangerous or regulated chemicals may require prior EHS approval. <ol style="list-style-type: none"> 1. Reach out to the supplier to obtain the Safety Data Sheet (SDS) or go this link (https://ehs.umich.edu/research-clinical/chemical/safety-data-sheets/) to obtain the SDS for the chemicals. 2. Check U-M EHS requirements (U-M EHS Chemical Procurement and Inventory Policy) for allowable chemicals and approval processes and inform Purchaser whether approvals are required. 3. If required, obtain Procurement and EHS approval(s). <p>Procurement Approval</p> <ul style="list-style-type: none"> • Purchasing hazardous chemicals should generally go through standard Procurement channels, often using the M-marketsite or eProcurement systems. • U-M requires you to purchase chemicals from approved vendors. This ensures the university maintains oversight and can trace all hazardous chemical acquisitions. • For certain restricted or specialized chemicals, additional Procurement approval may be necessary. <p>EHS Approval</p> <ul style="list-style-type: none"> • EHS approval is mandatory for select hazardous chemicals, especially those classified as highly toxic, carcinogenic, radioactive, or controlled substances. • Principal Investigators (PIs) and laboratory supervisors have the responsibility to ensure materials are appropriate for their labs, all users are trained, and proper protocols are followed. • Some chemicals may require submission of a Use Authorization, risk assessment, or Standard Operating Procedures (SOPs) to EHS, particularly for highly hazardous chemicals. <p>Steps to Purchase Hazardous Chemicals at U-M</p> <ol style="list-style-type: none"> 1. Check U-M EHS requirements (U-M EHS Chemical Procurement and Inventory Policy) for allowable chemicals and approval processes. 2. Order through M-marketsite/eProcurement: <ul style="list-style-type: none"> ○ This links your order with EHS's inventory tracking and ensures compliance—for many standard chemicals, this streamlined system may be sufficient. 3. Seek special approval if needed: <ul style="list-style-type: none"> ○ EHS will flag certain chemical orders for additional review and approval. ○ Controlled substances, select agents, and certain toxins always require prior written approval from EHS. <p>Maintain compliance: All hazardous chemicals must be inventoried and stored properly; all users must be trained according to EHS guidelines.</p> <p>Quick Reference Links:</p> <ul style="list-style-type: none"> • EHS: Chemical Procurement & Inventory • EHS: Controlled Substances • U-M Procurement Services <ul style="list-style-type: none"> • Compressed Gas
Shipping	<ul style="list-style-type: none"> • Shipping Address: choose building name, room # and name of lab person who will pick-up the goods when shipped to UM. <ul style="list-style-type: none"> ○ Once OPS request is submitted, proof the address for a Location ID number.

	<ul style="list-style-type: none"> ○ If shipping address is not the DOW building, a Location ID is required for POs (products not purchased with a PCard). ● Mark as “Expedited Shipping” if the order is urgent, if the Quote is about to expire, the shortcode is about to expire (see Shortcode, Grant End Date), etc. This will highlight your ticket in yellow. ● For efficient approval process and to reduce the risk of delays—particularly for urgent orders: <ul style="list-style-type: none"> ○ Proactively request an estimated shipping cost—and, if applicable, an estimated tariff—from the supplier as soon as possible. This is especially important since some U.S. companies source products internationally. ○ If the supplier is unable to provide this estimate, proactively research comparable shipping and tariff costs. And include both “Estimated shipping cost” and, where relevant, “Estimated tariff” as distinct line items in OPS. ● Anything ordered with U-M funds is university property and should be shipped to a valid U-M address whenever possible. <ul style="list-style-type: none"> ○ When shipping to a non-university location, Requester must make every effort to ship to a university address. If it is not possible to do so, provide the reason in OPS why a non-university address was selected. <ul style="list-style-type: none"> ▪ Users are not allowed to ship orders to their homes through ePro Requisitions or M-Marketsite transactions -- For PCard purchases shipped to a non-UM location, <u>Procurement approval is required</u>. Exception Memo: Suppliers may only direct shipments to either a university address or other university-approved location” whenever possible. ▪ Equipment shipped to non-UM location: complete the request for approval form, have it signed by your professor/faculty, and get approval from Property Control. ● For imports or shipping to a foreign entity for repairs, see ICC’s new 2020 INCO (International Commercial) terms for CIP (Carriage and Insurance Paid To (insert place of destination)) to see supplier’s other additional charges that may not be included in the Quote. <ul style="list-style-type: none"> ○ You can find information online for INCO Chart 2020. This describes supplier and customer responsibility for each international shipping term.
Shortcode	<ul style="list-style-type: none"> ● If the shortcode is about to expire (see Grant End Date), ensure the package is received one week before the Grant End Date by contacting the supplier. If it is not possible, choose a different supplier or let the Purchaser know. The sponsor may deem the expense ‘unallowable’ if the package is received at least one week before the End Date. Ensure package is received <u>at least two weeks</u> if supplier is unlisted in OPS, <u>three weeks</u> if supplier is a foreign entity <u>and</u> unlisted.
Supplier Information	<ul style="list-style-type: none"> ● Enter an email address for unlisted suppliers so that a Supplier ID may be requested from SSC, Supplier Maintenance team. Supplier Maintenance will reach out to the supplier for supplier information and documentation. ● After submitting the OPS, read the Supplier Information for Notes about the supplier. If we have a <u>Supplier ID number</u>, the purchase will be made by

	<p>submitting a PO to the supplier (i.e., not purchased via their website using a <u>PCard</u>)</p> <ul style="list-style-type: none"> • Auctions: Procurement does not allow purchases via auctions as they use Ebay. For example, bidspotter.com terms and conditions are very one sided to the supplier. The items are all sold "as-is" and the department would be assuming all risk in the event that something occurred with the equipment. Procurement Services will not be able to assist with any damaged, defective, or underperforming items. We are normally able to have a supplier waive the collection of sales tax upfront. The 20% bidder fee and 3% credit card fee are part of the cost of doing business with this supplier.
Items to Order	<ul style="list-style-type: none"> • This section must match the supplier's Quote. • This section is what will be added to the PO, verbatim. OPS "Comments" are not added to the PO. To avoid errors, to ensure you have exactly what you need for your order, include all relevant information here, not in the Comment box. • Shop in Marketsite first, then external suppliers if you cannot find the item you need. • May 2025 – Marketsite supplier catalogs are now organized by category — <i>Office & Computer Supplies, Lab & Research Supplies, Facilities & MRO Supplies,</i> and Furniture (see PDF doc. In link). <i>Office supplies must now be purchased via Staples, not Amazon.</i> • For suppliers that require PCard/credit card payment or require purchase via their website (e.g., Amazon): <ul style="list-style-type: none"> ○ Enter each line item in this "Items to Order" section (entering "see Quote" is incorrect). ○ Enter the <u>website description</u> exactly and the URL for each item that you want to purchase. • Tariff and import duties for international purchases or part of the order originating outside the country: Add a separate line to your OPS submission indicating your estimated tariff and import duties when procuring products from international suppliers, or when a U.S. supplier includes a tariff fee due to part of the order originating outside the country. This is crucial for ensuring your PI and RA have a complete understanding of the total projected cost, which helps maintain budget accuracy and reduces communication delays. If your PI does not approve payment for these additional charges, I recommend seeking a U.S.-based supplier for the product, if possible. <ul style="list-style-type: none"> ○ Cart Total (if applicable): By adding a separate line for tariffs and duties, your OPS total (excluding these fees) will align with your cart total. ○ Large Purchases: For significant transactions, UM's customs broker, Baker Logistics Consulting Services, can help (for a fee) determine estimated tariffs or assess potential exemptions. To utilize their services, please be prepared to provide to MSE Purchaser: <ol style="list-style-type: none"> 1. A description of the items purchased 2. Their intended use 3. A copy of a Proforma Invoice • Discount: If a discount is offered, add "- " to the amount (e.g., "-45.00"). • Order lab coats from Fisher Scientific.

	<ul style="list-style-type: none"> • When the package or an item is received, mark the line “Received”. • UM Accounts Payable & MSE Dept need to know about the delivery so log into OPS order# & click ‘packages picked up’. Requester needs to upload packing slip into OPS order#. Department scanners available in Dow & Gerstacker buildings to scan packing slips.
Comments	<ul style="list-style-type: none"> • 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. Please DO NOT email messages outside of the OPS system. Communications should stay within OPS, not in emails outside of OPS to contain all order information as backup / auditor review. When email is used, copy and paste the email in Comments, or refer reader to the PDF version of the email thread Requester will attach to OPS. • Any information (including phone conversations with supplier, copy of emails from supplier or other UM departments) pertaining to the OPS order will be added in the Comments box to let everyone know the background and status of the order. This is helpful especially if the Requester cannot be reached for questions. • In very rare instances when the item was already ordered (not in compliance with procedures), enter the information in the Comments box to avoid duplicate shipment, attach the invoice, and state that the invoice needs to be submitted to Accounts Payable. Placing an order with a supplier before obtaining approval, is not recommended since all orders should first be entered in OPS, approved, and (if applicable) a PO created. • When sending a comment to a specific individual, be sure to enter the recipient or multiple recipients’ unqname.
Other Attachments	<ul style="list-style-type: none"> • Attach quotes, Marketsite carts, required documents for over \$10K purchases, emails, etc. • If ordering through Marketsite, there should be only one supplier in your attached ‘Cart - Draft Requisition’. • Attachments will be stored indefinitely for future reference.

a) OPS Request Status

The requester will receive progress updates from OPS. **My Profile** can be set to receive notifications, or the Requester can check their OPS request at any time.

- i) Pending Approval:** OPS orders will automatically route for approvals based on the entered shortcode. The system is in place to collect/document approvals for purchases more easily than sending emails back and forth.
- Once the OPS is submitted for approval, the professor/faculty will receive a system notification that an order has been requested. The email will include details of the order. The professor/faculty will choose one of the following three options:
 - (a) Approve only
 - (b) Modify/approve order (e.g., modify shortcode)
 - (c) Deny the order

- The Financial Staff member (usually the Research Administrator) will receive an email to review/approve the OPS order. The Financial Staff is reviewing budgetary compliance orders to ensure that funds are available and items are allowed for your project.

ii) Ready to Process: OPS request will route to purchasing staff (Marketsite requests to Administrative Assistant (sfellers@umich.edu), computer-related requests to MSE's Senior Information Technology Administrator (kworth@umich.edu), all other requests to Financial Specialist (jorgenl@umich.edu) to process.

- The requester may still make changes to the request
- Purchases using POs,
 - (a) The Purchaser will copy information from "Items to Order" and create a Requisition.
 - (b) Procurement will review and approve requisitions for purchase requests over **\$10K**
 - (c) Once Procurement approves the requisition, a PO will be generated, and the system will automatically send the PO to the supplier (via email, fax, postage mail, depending on what the supplier has set up as their dispatch method; the default dispatch method is print/postage mail).
 - (d) Once the supplier receives the PO, the supplier will add the PO number to the invoice and submit the invoice to Accounts.Payable@umich.edu.
- Purchases using PCard – The purchaser will use the link/URL from "Items to Order" to make an online purchase.

iii) Processing

- The requester can no longer modify the OPS request. The requester may contact the purchaser (see "Purchase Staff Assigned") via the Comments section for any necessary changes to the order.
- Expect delays if

The supplier is unlisted in OPS and is not in UM's supplier database, as a supplier ID will need to be requested from SSC (not providing the supplier email address will further delay the process)

- The supplier is a foreign entity, as at least four more UM approvals are required before wire payment is made
- The supplier does not accept UM's "FOB Destination" shipping terms, as a request for Procurement to review and approve the change needs to be submitted
- Your order is over \$10K
- the information and/or document(s) provided in OPS is inaccurate or incomplete

iv) Ordered

- See Lab Responsibility below
- Changing the following after a PO has been generated will require canceling the PO and generating a new one:
 - Shortcode
 - Payment terms
 - Supplier address

b) OPS orders are stored indefinitely on the server for future reference & ability to reorder from previous orders placed quickly. Do not create a new OPS order to make changes to an existing approved OPS order; instead, use the email/comments to communicate changes to the order.

c) Lab Responsibility:

- i) Contact the Supplier Representative or customer service to obtain the order status and/or tracking information. If you need a copy of our PO (the PO number is in OPS), please contact your Purchaser know or send a request to the SSC [eForm](#) (<https://teamdynamix.umich.edu/TDClient/40/Portal/Requests/ServiceDet?ID=2763>)
- ii) Pick up the order (e.g., if the shipping address is for the Dow building, go to Room 3062, the supply room, located across from Shelley's desk, and then check out the package from the log sheet on Shelley's counter).
- iii) Return incorrect or defective products per the supplier's instructions
 - If a package needs to be returned, please contact the supplier and request instructions and a return label. Obtain the tracking number for the returned package. If the supplier does not receive the returned package and does not have the tracking number, the supplier will likely not issue a refund to the University.
- iv) When items are received, mark each item "Received" or click the green button **'Order Received'** after your package has arrived in your lab or office. This informs everyone that your order has been received and helps reconcile PI's shortcode.

4) **MARKETSITE (Entering Order in Marketsite then OPS)**

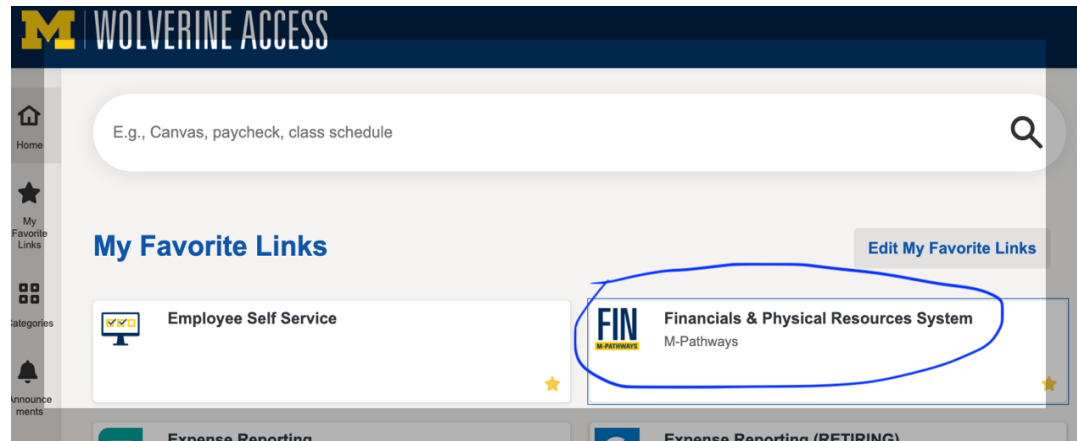
Toolkit: [Marketsite+ \(Jaggaer\) Customer Support Toolkit](#)

Process Marketsite Purchases: <https://sites.google.com/umich.edu/opstoolbox/ops-2-0/marketsite-purchase-process>

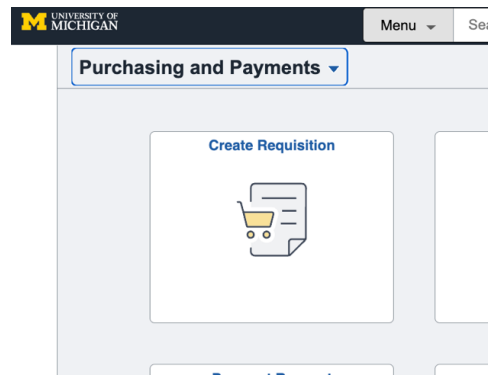
- Procurement training video and resources Website > <https://procurement.umich.edu/u-m-employees/purchasing/ordering/mMarketsite/>
 - Marketsite Resources (for quick screenshots, see below)
 - https://mylincontent.dsc.umich.edu/mais/html/PR_MS_Resources.html
 - Set Up Your M-Marketsite User Profile
 - Overview & Features
 - Enter a M-marketsite Order
 - Assign a Cart Order in M-marketsite (select Shelley F., sfellers@umich.edu as default assignee, for all Marketsite orders)
- a) Visit Marketsite and browse through supplier catalogs (see screenshots below).
- i) Please notify the Purchaser if you have a Quote from the Marketsite supplier with a lower price than what is listed in Marketsite. And the Purchaser will bypass Marktsite, and create a Requisition (without adding the supplier ID...).
 - ii) Take a screenshot of the final Marketsite cart (or get a copy of the "Cart - Draft Requisition") for submission to OPS.
 - When a Fisher Scientific item shows 'encompassed', it means the item is sourced from a third-party supplier.
 - iii) Assign the cart

1 Go to [Wolverine Access](#) and choose Financials & Physical Resources

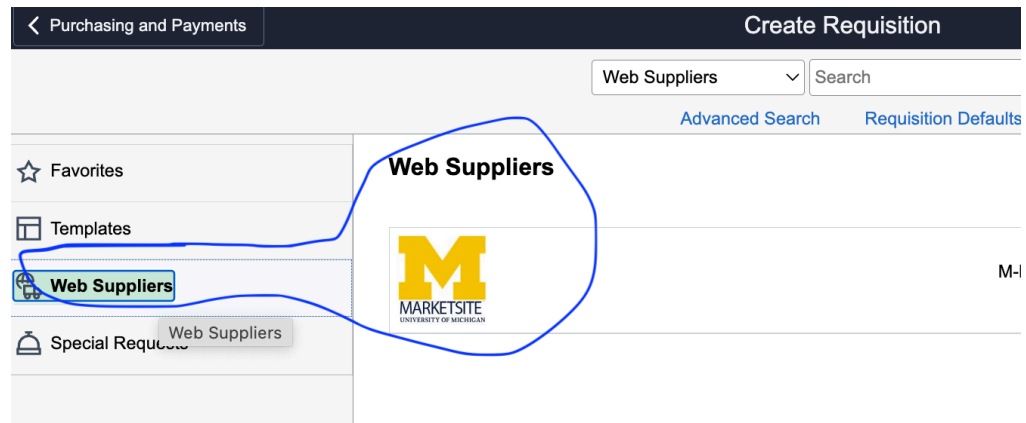
Training video: https://www.mivideo.it.umich.edu/playlist/dedicated/376793092/1_10ptizoa/1_rafpf8ze



2 Choose Create Requisition



3 Choose Web Suppliers



4 Choose your supplier

5 Enter shipping address zip code

6a Shop

ePro Home Create Requisition


MARKETSITE
UNIVERSITY OF MICHIGAN

Business Advantage Products ▾ Services ▾ 915714

1 results for "915714"

Pick up and Delivery ▾ Brand ▾ Category ▾ Contract price Previously Ordered Rating ▾ E

Compare ⌵



Contract price

Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)
Item: 915714 Model: 21271

★★★★★ 1047 ✔

\$56.99 ~~\$89.19~~ Market price
36/CT (\$0.02/Sheet)

Free delivery

1 ▾ Add

6b Review & Checkout

ePro Home Create Requisition


MARKETSITE
UNIVERSITY OF MICHIGAN

Business Advantage Products ▾ Services ▾ 915714

1 results for "915714"

Pick up and Delivery ▾ Brand ▾ Ca Sort by Con

Compare ⌵



Contract price

Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)
Item: 915714 Model: 21271


★★★★★ 1047 ✔

\$56.99 ~~\$89.19~~ Market price
36/CT (\$0.02/Sheet)

Free delivery

1 ▾ Add

Added 1 to cart ✕



Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)

Delivery by Tue, Aug 20


1 @ \$56.99 36/CT **\$56.99**

✔ You're saving \$32.20 on this item!

Review & checkout

Continue shopping

Customers also bought




Contract price

Kleenex Professional Cube Facial Tissue, 2-ply, White, 90...

No reviews yet

\$56.99 ~~\$89.19~~

1 ▾ Add




Contract price

Kleenex Standard Facial Tissue, 2-Ply, 160 Sheets/Box, 3...

★★★★★ 21

\$4.69 ~~\$9.09~~

1 ▾ Add




Contract price

Kleenex Boutique Standard Facial Tissues, 2-Ply, 90...

No reviews yet

\$8.43 ~~\$17.99~~

1 ▾ Add



Contract price

Perk™ Ultra Soft Standard Tissue, 2-Ply, 160 Sheets/Box, 3...

★★★★★ 83

\$6.70 ~~\$8.09~~

1 ▾ Add

6c Submit Order

Review & Checkout

Print Cart Print Quote

Order Summary

Items (1) \$56.99

Total \$56.99

✓ You're saving \$32.20 on this order!

Delivery to: Ann Arbor, MI 48109

Submit Order

1 item in cart

Delivery

Contract price: 36% off

Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)

Item #: 915714 | MFR #: 21271 | CIN #: 915714

Market price \$89.19

Contract price (36/CT) **\$56.99**

Delivery by Tuesday, Aug 20, 2024

1

\$56.99

You're saving \$32.20!

7 Click printer icon to get a copy of final Marketsite cart

Shopping Cart • 190605499

123.12 USD

Proceed To Checkout

Simple Advanced

Search for products, suppliers, forms, part number, etc.

3 Items Select All

STAPLES INC • 3 Items • 123.12 USD

SUPPLIER DETAILS

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 8/18/2024 9:33:04 PM

- Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)

Need to make changes? [MODIFY ITEMS](#) | [VIEW ITEMS](#) Item(s) was retrieved on: 8/18/2024 9:38:45 PM

- PURELL Advanced Hand Sanitizer Soothing Gel, Fresh Scent, 12 oz., 12/Carton (3639-12CT)
- Perk Disinfecting Wipes, Lemon, 75 Wipes/Pack, 6/Carton (PK56665CT)

Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)	915714	CT	56.99	1 CT	56.99	...
ITEM DETAILS						
PURELL Advanced Hand Sanitizer Soothing Gel, Fresh Scent, 12 oz., 12/Carton (3639-12CT)	607833	CT	52.93	1 CT	52.93	...
ITEM DETAILS						
Perk Disinfecting Wipes, Lemon, 75 Wipes/Pack, 6/Carton (PK56665CT)	24411133	CT	13.20	1 CT	13.20	...
ITEM DETAILS						

Summary

Details

For LOURDES JORGENSEN

Name

2024-08-18 jorgeni 01

Total (123.12 USD)

Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 123.12

8 Save copy of "Cart - Draft Requisition" and later upload to OPS

Cart - Draft Requisition 190605499

Requisitioner Name	LOURDES JORGENSEN	Cart Name	2024-08-18 jorgenl 01	Shortcode	no value
				Dept Ref #	no value
Supplier / Line Item Details					
STAPLES INC			Contract	no value	
Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270)	915714	CT	56.99 USD	1 CT	56.99
PURELL Advanced Hand Sanitizer Soothing Gel, Fresh Scent, 12 oz., 12/Carton (3639-12CT)	607833	CT	52.93 USD	1 CT	52.93
Perk Disinfecting Wipes, Lemon, 75 Wipes/Pack, 6/Carton (PK56665CT)	24411133	CT	13.20 USD	1 CT	13.20
Supplier subtotal					123.12 USD
Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.			Subtotal	123.12	
			Total	123.12	

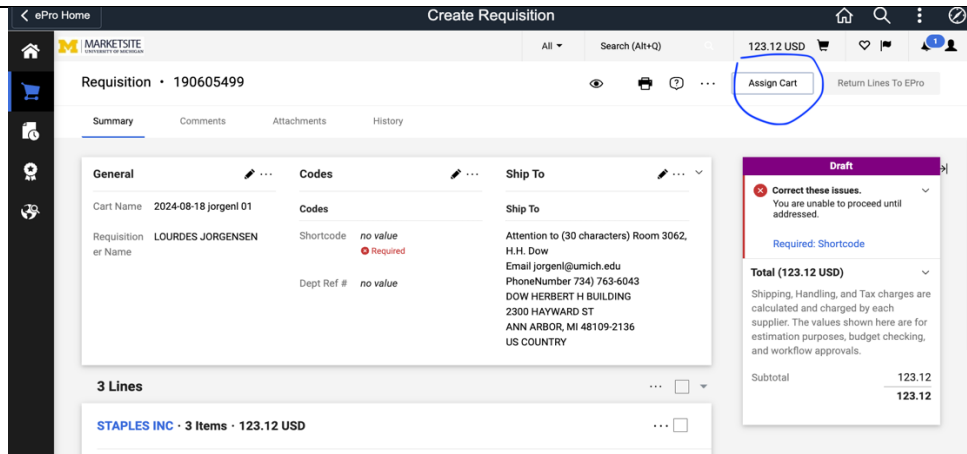
9a To assign cart or Re-assign to a different person, click "Proceed to Checkout"

The screenshot shows the 'Create Requisition' page in the ePro Home system. The shopping cart contains 3 items from STAPLES INC, totaling 123.12 USD. The items are:

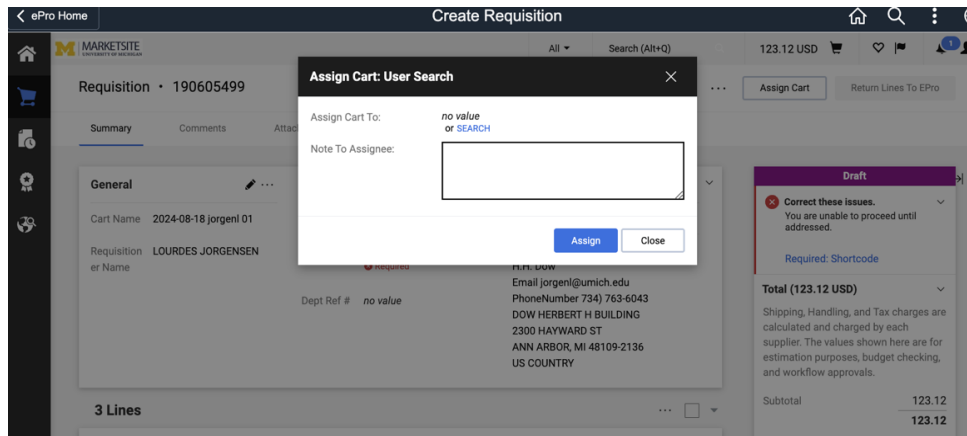
- Kleenex Professional Cube Facial Tissue, 2-ply, White, 90 Sheets/Box, 36 Boxes/Carton (21270) - 56.99 USD
- PURELL Advanced Hand Sanitizer Soothing Gel, Fresh Scent, 12 oz., 12/Carton (3639-12CT) - 52.93 USD
- Perk Disinfecting Wipes, Lemon, 75 Wipes/Pack, 6/Carton (PK56665CT) - 13.20 USD

The 'Summary' panel on the right shows the total of 123.12 USD and includes a note: "Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals." A blue circle highlights the "Proceed to Checkout" button in the top right corner.

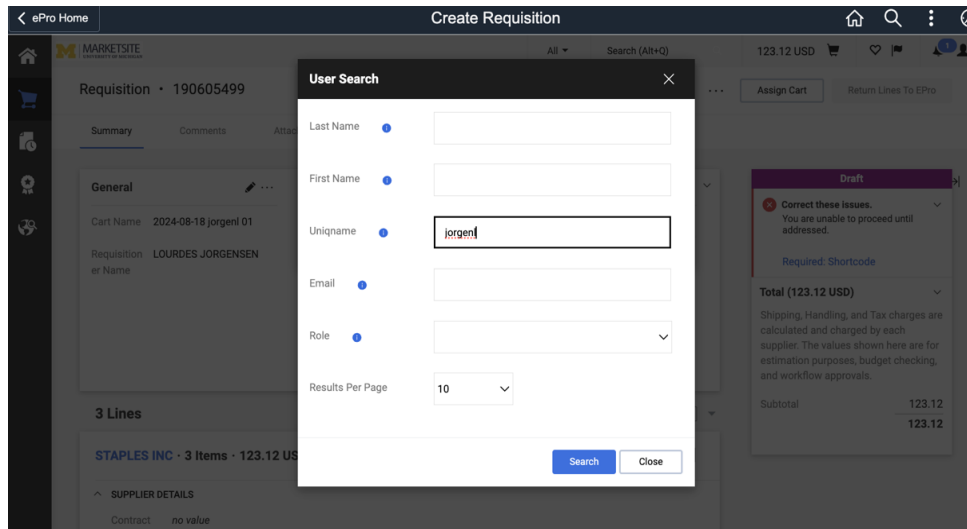
9b Assign Cart



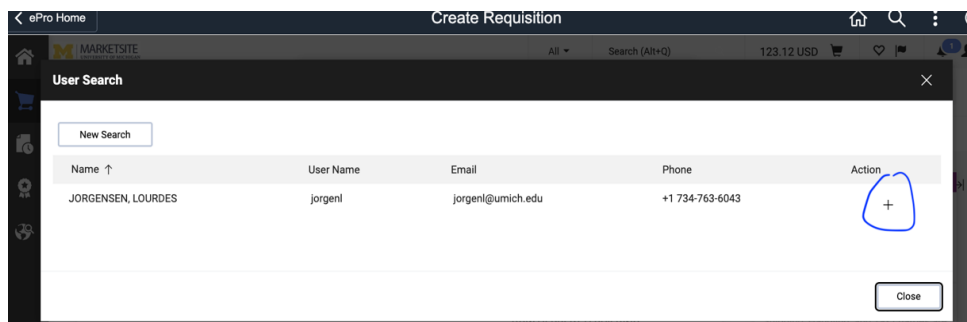
9c Click Search



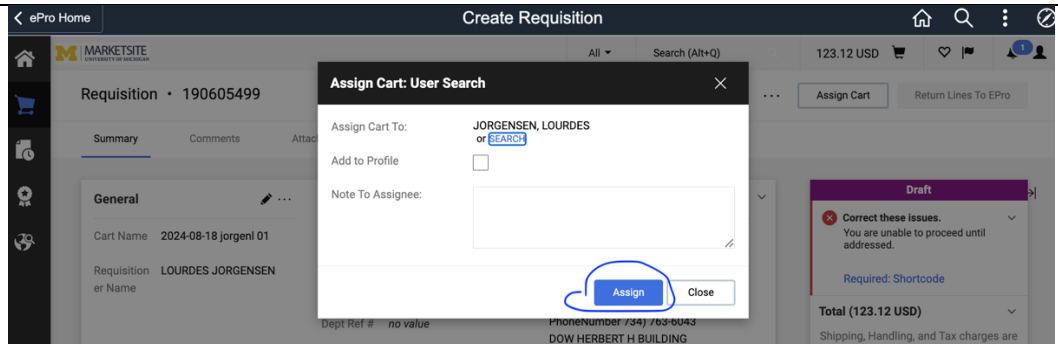
9d Enter unickname



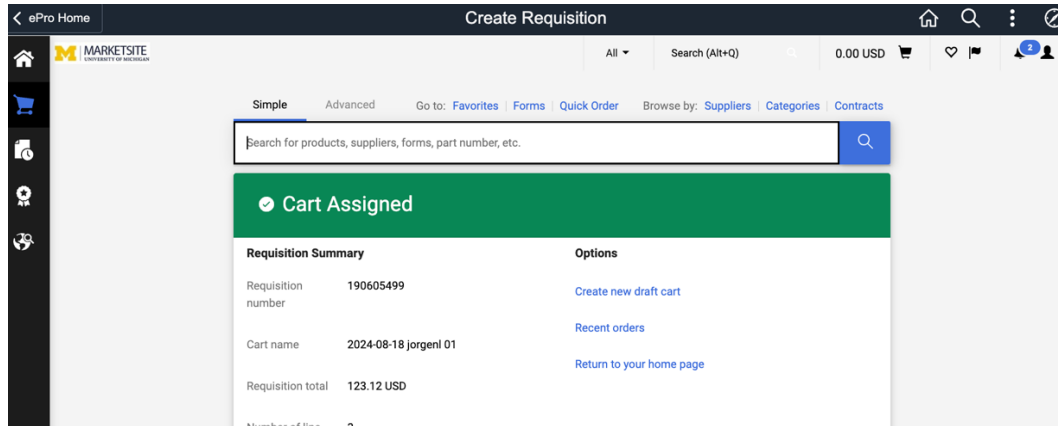
9e Click "+"



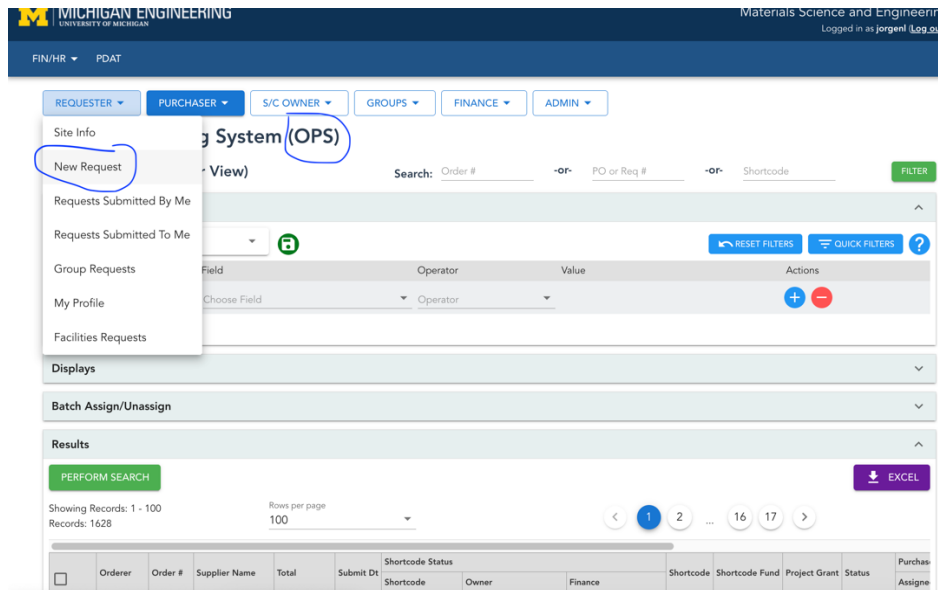
9f Click Assign



9g Cart Assigned



10 Go to OPS, Create new request



11 Enter order information into OPS

[REQUESTER](#) | [PURCHASER](#) | [S/C OWNER](#) | [GROUPS](#) | [FINANCE](#) | [ADMIN](#)

Online Purchasing System (OPS)

Purchase Request Form [New](#) [Change Department](#)

Basic Information

Order Nickname

Order placed by: Jorgensen, Lourdes (jorgenl)

Order placed on someone else's behalf

Order Type * Your Phone *

Purpose *

Special Handling

Account Code *

Shortcodes

Shortcode *	Shortcode Owner *	Percentage *	Amount *
	(not set)	100 %	\$ 0.00

[ADD SHORTCODE](#)

Waive shortcode owner approval

Shipping

Recipient: Lourdes Jorgensen

Shipping Address *

Expedited shipping

Supplier Information

You must specify a supplier.

Search for a Supplier

Start typing supplier name

Use unlisted supplier

[CREATE NEW SUPPLIER](#)

Order Items

Attach Supplier Quote or Invoice if available. Be sure all quotes and invoices are in text-based format rather than images so that the purchaser can copy/paste as needed.

of Decimals:

You must provide at least one list item with a valid quantity or upload a supplier quote.

Line #	Quantity *	Unit (ea, pkg, ct) *	Item # *	Item Description *	URL	Price/Unit *	Total
1	0	Each (EA)				\$ 0.00 <small>Required</small>	\$0.00

[ADD ITEM](#)

Quote from supplier, shopping cart or invoice : No supplier quote uploaded. [BROWSE](#)

Shipping Fees: \$ 0.00

Sole Source Form (only needed for orders ≥ \$50,000): No sole source form uploaded. [BROWSE](#)

Comparable Quote 1: No comparable quote 1 uploaded. [BROWSE](#)

Comparable Quote 2: No comparable quote 2 uploaded. [BROWSE](#)

Comparable Quote 3: No comparable quote 3 uploaded. [BROWSE](#)

Order Total: \$ 0.00
Total is required

Comments

Add a comment here...

Other Attachments

Uploads can be in any of the following formats: pdf,doc,docx,xls,xlsx,tiff,png,jpg,jpeg

Other Attachments: None.

[ADD OTHER ATTACHMENTS](#)

[SUBMIT REQUEST](#) [SAVE DRAFT](#)

12 Attach Marketsite “Cart - Draft Requisition”

[REQUESTER](#) | [PURCHASER](#) | [S/C OWNER](#) | [GROUPS](#) | [FINANCE](#) | [ADMIN](#)

Online Purchasing System (OPS)

Purchase Request Form [New](#) [Change Department](#)

Basic Information

Order Nickname

Order placed by: Jorgensen, Lourdes (jorgenl)

Order placed on someone else's behalf

Order Type * Your Phone *

Purpose *

Special Handling

Account Code *

Shortcodes

Shortcode *	Shortcode Owner *	Percentage *	Amount *
	(not set)	100 %	\$ 0.00

[ADD SHORTCODE](#)

Waive shortcode owner approval

Shipping

Recipient: Lourdes Jorgensen

Shipping Address *

Expedited shipping

Supplier Information

You must specify a supplier.

Search for a Supplier

Start typing supplier name

Use unlisted supplier

[CREATE NEW SUPPLIER](#)

Order Items

Attach Supplier Quote or Invoice if available. Be sure all quotes and invoices are in text-based format rather than images so that the purchaser can copy/paste as needed. # of Decimals: 2

You must provide at least one list item with a valid quantity or upload a supplier quote.

Line #	Quantity	Unit (ea, pkg, ct)	Item # *	Item Description *	URL	Price/Unit *	Total
1	0	Each (EA)				\$ 0.00	\$0.00

[ADD ITEM](#)

Quote from supplier, shopping cart or invoice : No supplier quote uploaded. [BROWSE](#)

Sole Source Form (only needed for orders ≥ \$50,000): No sole source form uploaded. [BROWSE](#)

Comparable Quote 1: No comparable quote 1 uploaded. [BROWSE](#)

Comparable Quote 2: No comparable quote 2 uploaded. [BROWSE](#)

Comparable Quote 3: No comparable quote 3 uploaded. [BROWSE](#)

Shipping Fees: \$ 0.00

Order Total: \$ 0.00

Total is required

Comments

Add a comment here...

Other Attachments

Uploads can be in any of the following formats: pdf,doc,docx,xls,xlsx,tiff,png,jpg,jpeg

Other Attachments: None

[ADD OTHER ATTACHMENTS](#)

[SUBMIT REQUEST](#) [SAVE DRAFT](#)

- b) Go to OPS and create a New Order:
- i) Enter order information into OPS.
 - ii) Attach the (PDF format) final Marketsite ‘Cart - Draft Requisition.’
 - iii) Enter “see cart” (for Marketsite orders only) in the OPS line description.
 - iv) Submit the OPS request for approvals.
 - v) Once approved, the OPS order will route to:
 - Administrative Assistant (Shelley, sfellers) for Marketsite suppliers
 - Senior Information Technology Administrator (Kevin, kworth) for computer-related items

For assistance, contact:

- **OPS:** Financial Specialist (jorgenl@umich.edu, 734-763-6043, H.H. Dow Bldg., Room 2142).
- **Marketsite Orders:** Administrative Assistant (sfellers@umich.edu, 734-764-2383, H.H. Dow Bldg., Room 3074)
- **Procurement Services:** procurement.services@umich.edu, 734-764-8212, prompt 2, 8:00 am to 5:00 pm

Videos and Resources:

- Admin. OPS Toolbox: <https://sites.google.com/umich.edu/opstoolbox/ops-2-0>
- Restricted expenditures for federal projects (Uniform Guidance Monitored Budgets): <https://finance.umich.edu/sites/default/files/2023-02/Job%20Aid%20-%20Uniform%20Guidance%20Monitored%20Budgets.pdf>
- Restricted Purchases and Special Approvals: <https://teamdynamix.umich.edu/TDClient/68/Portal/Shared/FileOpen?AttachmentID=8cd99a69-ce90-4e0c-9996-674f321343f5&ItemID=8570&ItemComponent=26&IsInline=-1>