

Approving an Order Request Using LSA's Online Purchasing System

Overview

LSA's Purchasing Request Tool 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.

Approval Requirements

There are 2 levels of approval that *may* be required for an Online Purchase Request:

Project Investigator Approval Level 1

- The first potential approver will be the PI of the shortcode on which the order is being placed (note: the PI automatically populates on the order form, but can be changed to any other person. When this happens, the PI is no longer the approver).
- For all PI's currently in Physics, an order must be over \$3,000 to be required for approval. This number may be moved up or down depending on individual preferences, and should be done by sending an email request to LSA-Procurement-staff@umich.edu, or stopping by the Procurement Office.


Business Office Approval Level 2

- The second potential approver will be a Finance staff in the Business office. They will approve any order that is over \$2,000, or if the order is being charged directly to a sponsored project, they will approve all regardless of amount.

How to Approve

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

Purchase Request: Approval Required Inbox x Print Image

 **LSA Procurement Group** <LSA-procurement-staff@umich.edu> Sep 28 ☆ Reply More

to me ▾

A purchase request has been submitted by Christine (chobbs) and requires your approval.
A copy of the order has been included below.

View this order:
<https://me-web1-dev.engin.umich.edu/order/index/view?dept=171200&id=54> 1.

Approve this order:
<https://me-web1-dev.engin.umich.edu/order/index/approve?dept=171200&id=54> 2.

View all orders that require your approval:
<https://me-web1-dev.engin.umich.edu/order/index/groups?dept=171200&username=andersos> 3.

1. The approver can click on this link to view the order in the Online 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****

ORDER INFORMATION

Order Submitted By: Christine (chobbs)

Submitter Phone: 764-3601

Submitter Email: chobbs@umich.edu

Shortcode: 100056

Owner of Shortcode: andersos

SHIPPING INFORMATION

Janet

519 S. State Street

G353 Mason Hall

Ann Arbor Mi 48109-_____

VENDOR INFORMATION

Name: Marketsite

Address:

500 S. State Street

Ann Arbor Mi 48109-_____

Phone: [7347643601](tel:7347643601)

Fax Number: chobbs@umich.edu

ITEMS ORDERED

ITEM 1

Quantity: 1

Unit: EA

Item #: 12345

Item Description: Pens

Unit Price: \$25.00

Total Price: \$25.00

ORDER TOTAL

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 screenshot shows the LSA College of Literature, Science, and the Arts University of Michigan interface. At the top, there is a navigation bar with the LSA logo and text. Below this, there is a row of buttons: "New Order", "My Profile", "My Orders", "Group Orders", and "Site Info". The main heading is "Purchase Request". Below this, there is a section titled "Current Status" with a minus sign icon. Inside this section, the following information is displayed: "Order #: 54", "Order Status: Submitted" (with "Submitted" in a yellow box), "Submit Dt: 9/28/15 11:15 AM", "Manager Approval: Pending" (with "Approve Order" and "Reject Order" buttons next to it, and "Approve Order" highlighted with a red box), "Finance Approval: Pending", "Finance Admin: doverhol", and "Order Assigned To: chobbs".

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

They can also add and email comments to the Requestor:

Comments

You can email all comments (by clicking the button below) or a single comment (by clicking the email icon in the corresponding comment box). Once you press the button, a dialog will open with options for email recipients.

[Email All Comments](#) [View Email Log](#)

andersos - 10/2/15 11:26 AM



I thought we were going to use 123456?

Add a Comment:

[Add Comment](#)

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.