

# LSA Procurement OPS Instructions

# Creating a Profile in OPS

- Select your department using this [link](#).
  - It is important that you select the appropriate department so that orders are recorded under the correct department.
  - You should be directed to the main New Request page. See the screenshot below.
- To update your profile, select 'My Profile.' Users are able to update their default phone number, shipping, and notification preferences. See the screenshot below.
- Adding a profile saves time, and is a major benefit for those individuals who submit multiple requests. The settings will automatically default to your saved profile preferences.

*To have all request tickets open in a new window, check this box. This feature is highly recommended for OPS users*

- NOTE: If your building address does not populate from the drop-down menu, select Other and enter in your building information, address, including room number.

SITE INFO NEW REQUEST EXISTING REQUESTS MY PROFILE ALL REQUESTS

LSA-TEST

Online Purchasing System (OPS)

My Profile

Default Information

Your Phone  
123-123-1234

Shipping Address  
Chemistry

☒ Open requests in a new tab

Notification Settings

Would you like to receive email notifications for the following events?

☒ Notify when Faculty Approves Order

☒ Notify when Finance Admin Approves Order

☒ Notify when Order Status Changed to Processing

Would you like to have an additional person/group notified when your package(s) arrive?

Additional unigame or MCommunity group to notify

Note: You will always receive an email when your items have been ordered.

SAVE SETTINGS CANCEL CHANGES

# Submitting a Request in OPS

- To submit a new OPS ticket, select your department using this [link](#).
  - It is important that you select the appropriate department so that orders are recorded under the correct department.
  - You should be directed to the main New Request page. See the screenshot below.

SITE INFO NEW REQUEST EXISTING REQUESTS ▾ MY PROFILE ALL REQUESTS

LSA-TEST ▾

Online Purchasing System (OPS)

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

Basic Information

Order Nickname

Order placed by: Pulver, Kylee (pulverk)

☐ Order placed on someone else's behalf

Your Phone  
123-123-1234

Purpose

Special Handling

Shortcodes

| Shortcode * | Shortcode Owner * | Percentage * | Amount * |   |
|-------------|-------------------|--------------|----------|---|
|             | (not set) 🔍       | 100 %        | \$ 0.00  | ✖ |

ADD SHORTCODE

Shipping

Recipient  
Kylee Pulver

Shipping Address \*  
Chemistry ✕ ▾

Room #

☐ Expedited shipping

Supplier Information

You must specify a supplier.

Search for a Supplier ▾

Start typing supplier name

☐ Use unlisted supplier

- NOTE: If you are not directed to the landing page after selecting your department, click on 'New Request.' It will bring you to the same landing page as seen above.

# Submitting a Request in OPS

## *continued*

- Enter your information under the following sections
  - Basic Information
    - Order Nickname (can be used to describe what it is you're purchasing. Ex: Fisher Lab Supplies)
    - If you are placing the order on behalf of someone else, you can select the box, and enter the username of that person, with the option to notify them of the submission.

### Purchase Request Form New

**Basic Information** ^

**Order placed by:** Pulver, Kylee (pulverk)

☐ Order placed on someone else's behalf

Your Phone

Purpose

Special Handling

Select this box if you are placing an order on behalf of someone else.  
Note: that person will also receive notifications within the OPS ticket



# Submitting a Request in OPS

## *continued*

- Enter Shipping Information
  - From the drop-down, you can select the campus building (ex: Chemistry).
  - The 'Room #' field is critical as this ensures that the items are delivered to the correct location.
  - N/A may be entered for invoice requests
    - Please note - shipping addresses are not shared or saved across departments.

**Shipping** ^

Recipient:  
Kylee Pulver

Shipping Address \*

Room #

☐ Expedited shipping

# Submitting a Request in OPS

## *continued*

- Enter the shortcode(s) for the order request
  - In OPS 2.0, users have the option to add multiple shortcodes to one single order
    - Users are still required to provide a shortcode, regardless if they select the box 'Provide shortcode owner instead of shortcodes.'
    - If the order contains multiple shortcodes, the total percentage must equal 100%. The order can be split by amount or percentage.

**Shortcodes** ^

| Shortcode *          | Shortcode Owner * | Percentage * | Amount * |   |
|----------------------|-------------------|--------------|----------|---|
| <input type="text"/> | (not set) 🔍       | 100 %        | \$ 0.00  | ⊖ |

ADD SHORTCODE

*New feature within OPS 2.0 where you can add multiple shortcodes for one order*



# Submitting a Request in OPS

## *continued*

- Enter Supplier Information
  - From the drop-down menu, start to type in the supplier you would like to use. If the supplier already exists in the system, it will auto-populate.
    - **IMPORTANT:** Please do not edit the supplier information.
  - If you do not see the supplier from the drop-down, select 'Use unlisted supplier' and enter the information to the best of your ability.
  - You can only add one supplier per OPS ticket. Multiple suppliers cannot be added to the same ticket.

**Supplier Information** ^

You must specify a supplier.

▼

Start typing supplier name

☐ Use unlisted supplier

# Submitting a Request in OPS

## *continued*

- Enter Order Item Details
  - Quantity should note how many items you want to purchase for that specific line item
    - Enter 1 for invoices
  - Item # should be the same as Marketsite or the online website
    - Enter the invoice number in the Item # field
  - Item Description should also include the package size (5ml, 7g, etc) or invoice number
  - URL should be copied from the online website
  - Unit Price must be in USD in the OPS system, but the vendor will ultimately be paid in the currency on the invoice

**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<br>Required | \$0.00 |

[ADD ITEM](#)

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

[Sole Source Form](#) (only needed for orders > \$10,000): No sole source form uploaded. [BROWSE](#)

Shipping Fees  
\$ 0.00

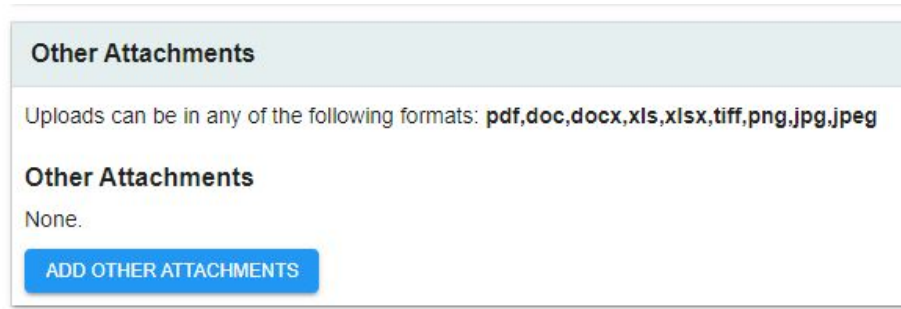
Order Total \*  
\$ 0.00  
Total is required



# Submitting a Request in OPS

## *continued*

- Add attachments or comments
  - Quote(s) from the supplier
  - Sole Source Justification Form
  - Comments
- Select 'Submit Request' or 'Save Draft'



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



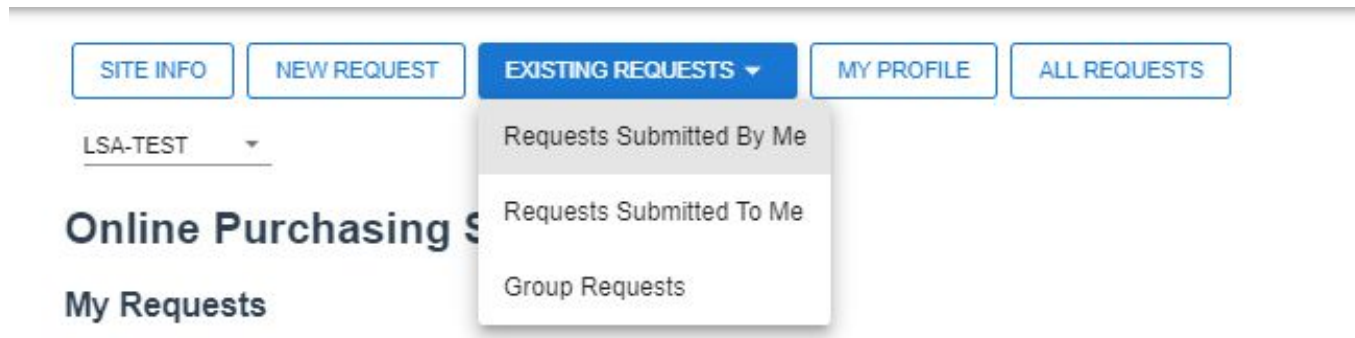
*Submit Request will route the OPS ticket to the appropriate approval flows for ordering*

*Save Draft will allow you to come back to the existing ticket and edit/modify the details before the request routes for approval*

# My Orders and Navigating OPS

Once an order is submitted, there are three ways to track the status:

- Under 'Existing Requests'
  - **Requests Submitted By Me** - any order you personally submitted or where an order was submitted on your behalf
  - **Requests Submitted To Me** - any order where you are the shortcode owner
  - **Group Requests** - Groups are managed lists of people that share relevant interaction. Groups can be created and updated by emailing LSA-Procurement-Staff@umich.edu



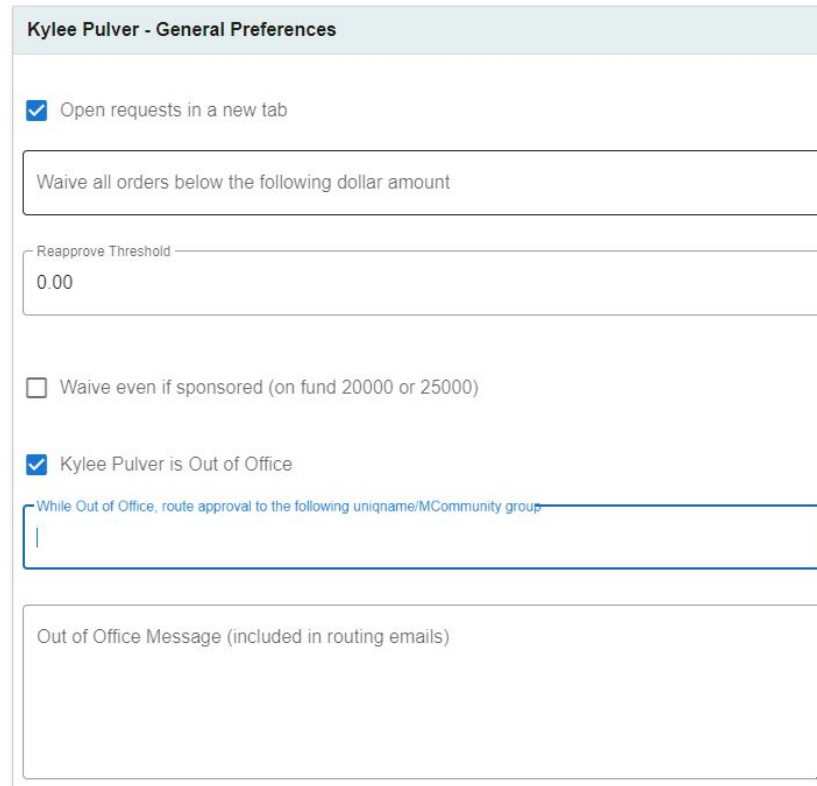
# Updating Approval Flow

- Within OPS 2.0 Finance and PI/Managers have the ability update their approvals when out of the office, set limits, and enable various waive/assign rules under the Shortcode Owner or Finance Preferences tab

*PI/Managers can select a certain dollar amount to bypass approvals in OPS*



*Users can also select an 'Out of Office' setting and have OPS approvals route to a specific individual or MCommunity group*



The screenshot shows the 'Kylee Pulver - General Preferences' form. It includes the following fields and options:

- ☒ Open requests in a new tab
- Waive all orders below the following dollar amount: [Text input field]
- Reapprove Threshold: [Text input field with value 0.00]
- ☐ Waive even if sponsored (on fund 20000 or 25000)
- ☒ Kylee Pulver is Out of Office
- While Out of Office, route approval to the following username/MCommunity group: [Text input field]
- Out of Office Message (included in routing emails): [Text area]

**The following slides pertain to only those individuals who receive orders on behalf of their departments or approve orders within OPS**

- LSA Facilities Staff
- LSA Technology Services Staff
- OPS Finance Staff or PI/Managers

# Receiving in OPS

Once an OPS ticket changes to “ordered” staff who have the receiving functionality will have the ability to receive specific line items within an order or an entire order

- Under ‘Receiving’ end-users can select the green button ‘Order Received’ if the entire order is received or once an order has been received in full
- Within the ‘# of Packages to Add’ field, end-users can note which line items have been received and mark the qty if there are multiple items. To add a notification, select ‘Add Packages’ for tracking

*Select this button when an order has been received in full*

*Note the line items received and the qty (if applicable)*

**Receiving**

Use the below field to add packages ready for pickup to this order, this will send a notification to the requester.

# of Packages to Add

ADD PACKAGES

Packing Slips:  
None.

MANAGE PACKING SLIPS

You can use the below button to mark all items as received or use the received checkbox in the items table to mark individual items as received.

ORDER RECEIVED

*The Email Log is where users can view which specific items have been partially received*

Email Log

*Users can upload packaging slips by clicking this button*

| Time ↓               | Type                           | Recipient         | Sender  |
|----------------------|--------------------------------|-------------------|---------|
| 10/04/2022 @ 2:44 PM | Line item 1 (10 of 20 received | pulverk@umich.edu | pulverk |
| 10/04/2022 @ 1:13 PM | Item 123 Test received New Pkg | pulverk@umich.edu | pulverk |