



Buying at U-M

A Quick-Start Guide





Buying at U-M—A Quick-Start Guide



Welcome!

At Procurement Services, our goal is to partner with you to make it easy, convenient, and cost effective to purchase the products and services you need to support the University of Michigan’s missions of education, research, and patient care. Beyond that, we’re here to help reduce legal and financial risks for you and ensure that U-M’s purchasing dollars are spent in an ethical manner.



The breadth and depth of U-M’s purchasing efforts are as diverse as the institution itself and this document, *Buying at U-M—A Quick-Start Guide*, was developed to help you, regardless of the size, scope, and type of your purchasing needs. It includes a variety of helpful resources, ranging from descriptions of buying methods and contact information to policies and training modules—all presented in a short, easy-to-understand format.

We welcome your questions and [look forward to hearing from you](#), both about this guide as well as any other ideas you may have to make the purchasing experience even better for the U-M community. On behalf of our teams, thank you for your ongoing support of Procurement Services.

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Director of Procurement Services

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Director Supply Chain Strategy and Procurement—Michigan Medicine

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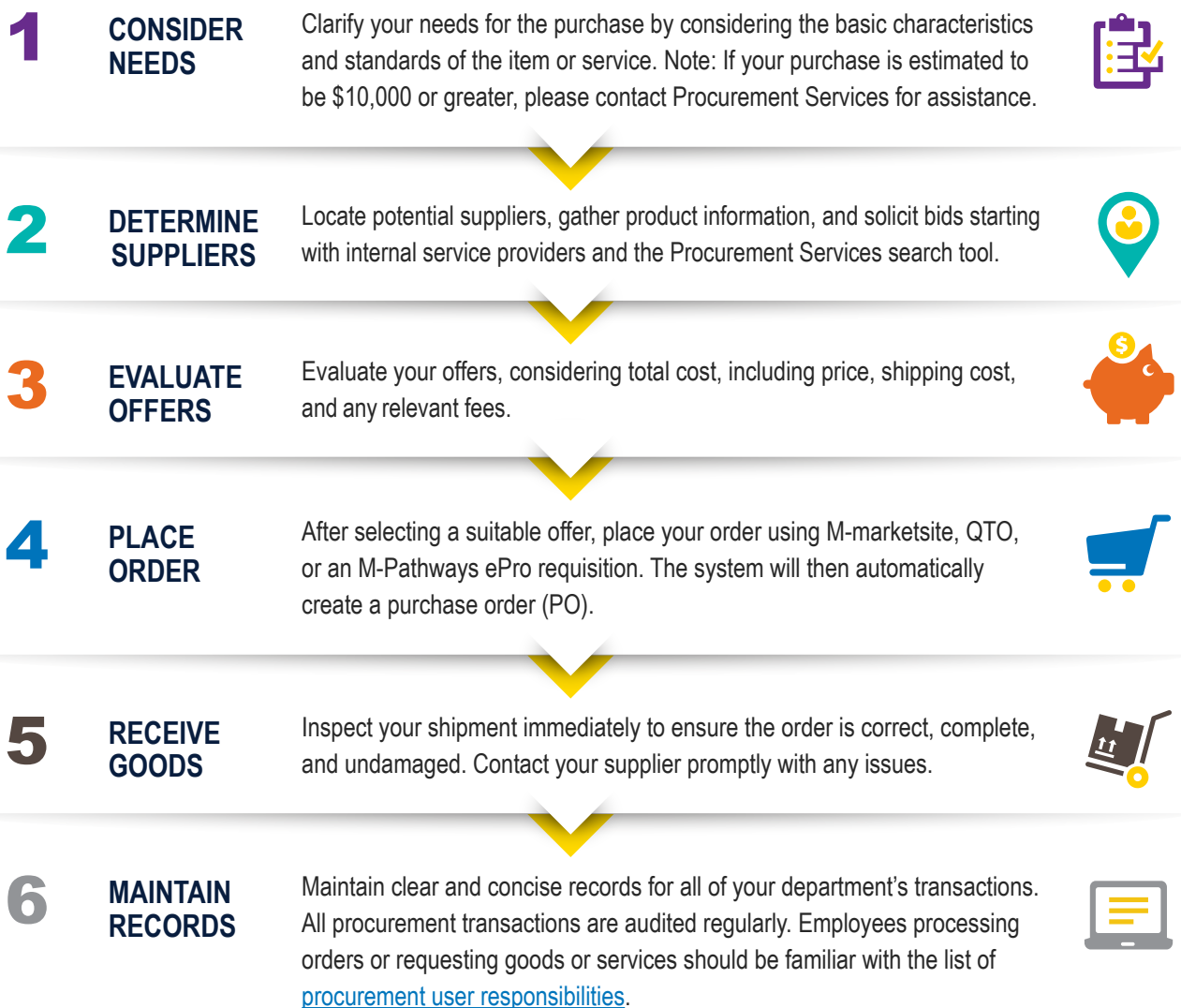


Procurement Services buying process

Purchasing is the act of obtaining or buying goods and services. The process ranges from determining needs to receiving goods and maintaining records.

Procurement involves sourcing products, negotiating favorable prices, and selecting goods and services important to you and your department.

The following six steps detail the buying process recommended by Procurement Services to make your purchasing more cost effective and efficient.





Buying methods

Procurement Services helps colleges, schools, and units make buying decisions in the most cost-effective and convenient way possible. The following list offers a number of buying options for your consideration when making purchasing decisions for your area.

Internal service providers

U-M business units that provide products or services to other departments.

Please [search by commodity](#) to determine if the product or service is available through an internal service provider. Orders may also be placed by phone or fax.

Strategic supplier contracts

Competitively bid contract pricing available to authorized U-M employees.

Visit the Procurement Services website under [Find Products & Services](#) or shop at M-marketsite.

M-marketsite (User)

U-M's online catalog that allows employees to create buying carts and use shortcodes to place orders from approved suppliers.

[M-marketsite](#) provides easy online access to multiple UM-approved suppliers.

Quote to Order (QTO)

A web-based portal designed to help U-M employees obtain estimates from multiple strategic suppliers for mailing, printing, web/graphic design, and IT temporary staffing.

U-M employees can [log into the QTO system](#) to create quotes and send them to strategic suppliers.



Buying methods (continued)

PCard

PCards can be used for travel, hosting, and occasional supply purchases. They are ideal for individuals who have frequent travel and hosting expenses.

The [PCard](#) is only for U-M business and all items purchased with it are the university's property. The PCard should only be used by the person to whom it's issued.

ePro requisition

The ePro requisition (ePro req) is used for all transactions that require a purchase order (PO).

It's also used for transactions that are \$10,000 and greater—and for those requiring [special approvals](#).

Competitive bid process (ePro requisitions over \$10,000)

Competitive bidding encourages companies to compete for a specific product, service, or project.

Contact the right [Procurement Team](#) for your purchase early in the process. The Procurement Team can create and send out competitive bids for goods to be purchased.

PeoplePay

PeoplePay is used for paying individuals rather than businesses. It is also used for paying honoraria, royalties, or recording prizes, gifts, and awards.

The [PeoplePay Decision Tool](#) helps employees to determine how to pay an individual for non-appointment-related items or services.



User responsibilities

The following list details the responsibilities of the employee processing an order or requesting goods or services.

Signature authority

Signature authority belongs to Procurement Services. Employees are not authorized to sign purchasing contracts and agreements on behalf of U-M.

- All contracts and agreements between a supplier and U-M must be reviewed by Procurement Services.
- Some contracts and agreements contain language requiring legal and/or risk management review. Procurement Services obtains the necessary approvals and ensures compliance.
- Procurement Services handles negotiations with suppliers and obtains the legally authorized signatures for all contracts and agreements.

Monitor order status and respond to supplier questions

The M-Pathways Manage Requisition Page provides you with the ability to review, edit, or cancel requisitions.

- View requisitions in any status. Active requisitions that have not been sourced to a purchase order and do not have a status of complete or canceled can be edited.
- After a purchase order has been dispatched (sent to the supplier), the goods or services are received and the supplier is paid.

Shipping to a non-university location

Anything ordered with U-M funds is university property and should be shipped to a valid U-M address whenever possible.

- Users are not allowed to ship orders to their homes through ePro Requisitions or M-marketsite transactions.
- Temporary guidance on shipments to a non-university address can be found on the [Procurement Services website](#).
- Questions about shipping to a non-university address should be sent to the [Procurement Solutions Team](#).



User responsibilities (continued)

Invoices

Respond to supplier questions regarding invoices or payments.

Restricted purchases

U-M prohibits some goods and services from being purchased. Other purchases require special approvals. Procurement Services maintains a [list of restricted purchases](#).

Training

All employees who purchase goods and services on behalf of U-M must complete the following eLearning courses in [My LINC](#) to obtain access to the transaction types in M-Pathways.

- **PRE101 Fundamentals of Procurement**—This course is the prerequisite to all other Procurement eLearning courses.
- **PRE103 Non-PO Voucher**—Primarily used as a method of payment for reimbursements. It is not a method for ordering goods and services. Users must complete the eLearning course PRE103 to obtain access for creating non-PO voucher transactions.

The M-Pathways eProcurement requisition (ePro req) is used to order goods and services in M-Pathways through the purchase order process. There are three types of ePro requisitions and a corresponding eLearning course for each.

- **PRE104 Special Request ePro req**—Used for one-time purchases from suppliers that do not have contracts with U-M and to create a “release” (order) against an M-Pathways contract.
- **PRE105 M-marketsite ePro req**—Used with U-M’s online catalog ordering system to place orders from suppliers that have negotiated pricing with the university.
- **PRE106 PeoplePay ePro req**—Used to pay an individual for non-appointment-related services.



Other resources

Procurement General Policies and Procedures

All purchases of goods and services must be made in accordance with the [Procurement General Policies and Procedures SPG 507.01](#). Adherence to these policies and procedures ensures that procurement activities will be done in an open and competitive environment and that all prices paid by the university will be fair and reasonable.

Procurement Services Buying Teams

procurement.umich.edu/about-us/contacts

Procurement Services Solutions Team

- Phone (734) 764-8212, prompt 2 (8 a.m. to 4:30 p.m.)
- Fax (734) 615-6235
- procurement.services@umich.edu

Michigan Medicine Procurement

2500 Green Road, Suite 100

Ann Arbor, MI 48105

- Phone (734) 763-9877
- UH-Procurementrequests@med.umich.edu
- med.umich.edu/i/supplychain/

ITS Service Center (4-HELP)

- The ITS entry point for direct support of everyday technology needs for the U-M community.
- its.umich.edu/help (Call, chat, or email options)

Online Access Request System (OARS) and Financial Unit Liaisons

[Online Access Request System \(OARS\)](#) is a tool for requesting and authorizing access to administrative data in ITS-managed systems and applications. Financial Unit Liaisons (Fin ULs) can initiate and authorize access requests for all users in their unit.

Contact Procurement Services

7071 Wolverine Tower
3003 South State Street
Ann Arbor, MI 48109-1282

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