Welcome to the UMeNET Purchase Requisition Creator Tutorial

Approximate Duration: 30 minutes

Contact Information: For questions or need additional information, please contact Heidi Tyre at 305.284.5115.

UMeNET Purchase Requisition Contacts

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<tr>
<th>Help Desk</th>
<th>Training</th>
<th>Technical Support</th>
<th>Change Orders / Cancellations</th>
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<tbody>
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Objective

This tutorial will demonstrate how to do the following to a Purchase Requisition.

- Approve
- Deny
- Search for
- View the status
- Change

Certified Browsers

UMeNET/Ariba is certified in the following Internet browsers. Below are the recommended browsers for full functionality of the system.

Supported Browsers

- Microsoft Internet Explorer 9 (32 bit), 8, 7, and 6
- Mozilla Firefox 8, and 3.6
- Safari 4 and 5
Using a non-compatible browser? Try Citrix.

Gables/RSMAS: http://ucitrix.miami.edu
Medical: http://it.med.miami.edu/x910.xml

UMeNET Purchasing Overview
UMeNET Purchasing allows the University community to electronically create process, view and store Purchase Orders for goods and services. These Purchase Orders are accepted by over 4,000 approved University vendors.

What is the overall process in approving a Purchase Order?

To approve or deny a Purchase Order:

1. Find the Requisition(s) pending approval.
2. Review the information.
3. Click Approve or Deny.
4. If needed, type comments for the Purchase Requisition creator.

The benefits of using UMeNET
- UMeNET functions in real time. This allows order to be processed the moment they are approved.
- Orders will be saved in the system for 10 years. This provides users with quick access to view current and past orders.
- UMeNET is paperless.
- Editing a Req doesn't require recreating the order.

Adding an Account to UMeNET

To add an account to UMeNET:

1. Find the Add Account Form online at https://www6.miami.edu/purchasing/UMeNETAddAccountForm.pdf.
2. Complete Section A: Department info.
4. Complete Section C: FRS Account Responsible Person. Contact the UMeNET helpdesk for the Account Responsible Person information.
5. Complete **Section D**: Check "Global Load" to change the approvers for all account numbers belonging to the Account Responsible Person. Or check "Individual load" to change the approver for only specified account number(s).

6. Complete **Section E**: Approval Flow. This designates the necessary departmental approvers for processing.

7. Submit the form using one of the following methods.
   - Fax to 305-284-8344
   - Scan and email to Boyd Bartow or Heidi Tyre

**Logging In**

To log in, open the Internet browser and go to [https://enet.miami.edu](https://enet.miami.edu).

The **CaneID login** is the same username and password used in MyUM to view paychecks and benefits.

**Creating a Personal Profile**

The profile includes information about your default account number, billing address, shipping address, and delivery contact. Note the accounting/shipping information can be changed when creating an individual Req.

**To view your personal profile:**

1. From the homepage, click **Preferences** on the green toolbar.
2. Click **Change Your Profile**.
3. View **Step 1** information and click **Next**. If the information listed is incorrect, contact Human Resources.
4. Update **Step 2** information and click **Next**.
5. Confirm the information in the right hand column and click **Submit**.
Setting E-mail Notification Preferences

To set the e-mail notification preferences:

1. From the homepage, click Preferences on the green toolbar.
2. Click change e-mail notification preferences.
3. Select Purchase Requisition from the drop down list.
4. Select a Notification method from the pull down list to have an e-mail sent immediately or as an e-mail summary.
5. To receive an e-mail when the document is approved, click the corresponding checkbox.
6. To receive an e-mail when the document is fully approved, click the corresponding checkbox.
7. Select a notification method for when a document needs approval.
8. Select a notification method for when approval is overdue.
9. Select a notification method for when you are a watcher.
10. To set the new defaults, click Save, or click Cancel to suspend changes.

Delegating Approval Authority

Use the Delegate Approval Authority functionality to temporarily grant approval authority to another user.

However, delegating approval authority does not delegate responsibility. The original approver is still responsible for all actions taken by the delegate.

Benefits to Delegating Approval Authority

- When authority is delegated, UMeNET sends email notifications to the delegate's e-mail address.
- Approvers have the option to continue receiving e-mail notifications.
- If returning to work and logging in during the delegation timeframe, an approver can remove the delegation or wait until the delegation period is finished and it expires automatically.
- When delegating authority, the change occurs for all accounts and UMeNET functions.
- The delegate will not need the original approver's password and will log in as them self.
• Delegate authority to a boss, peer, subordinate, etc.
• Audit trails will display who approved order(s).

To delegate approval authority to another user:

1. From the homepage, click Preferences on the green toolbar.
2. Choose Delegate Authority.
3. If authority is currently delegated to another user, the approver will have the option to either edit the saved delegate request or create a new delegate request.
4. To select a delegate, click the Delegate drop down menu.
5. To search for a name choose Search for More.
6. Enter a Delegation Start Date or click the Calendar icon and select the start date. The start date is the date your delegate will begin having your authority.
7. Enter a Delegation End Date or click the Calendar icon and select the date the delegation to end. The end date is the date the delegate will stop having authority.
8. Click Next to review the approval flow.
9. Click Next to review the changes.
10. Click Submit to process request.

Approving a Purchase Requisition

The approver is responsible for all actions taken. It is strongly recommended that approvers review the details of any Req that requires approval.

Approving / Denying a Purchase Requisition from an E-mail Notification

If a Req requires approval, the approver will receive an e-mail from Ariba Administrator, stating "Action Required" in the subject line.

To approve/deny a Purchase Requisition from e-mail:

1. Click Open in the e-mail message to launch the Req in the UMeNET that requires your approval.
2. Log in using your CaneID. Your CaneID login is the same username and password used in MyUM to view paychecks and benefits.
3. View the Req details.
4. Click **Approve** to approve the Req or **Deny** to deny the Req.
5. If needed, enter comments for the preparer in the **Comments** field. If the Req is denied and a comment added, the preparer will have an opportunity to reply to the comment.
6. Click **OK**.
7. The Req will automatically default to the **Archive Label**. To choose a different Label check the **Archive Items** box and select a Label from the drop down menu.
8. If there are additional Reqs pending approval, the system will display the next Req.

### Approving / Denying a Purchase Requisition from the Homepage

**To approve/deny a Purchase Requisition from the To Do portlet:**

1. To view the Req details, click the Req **ID** or **Title**.
2. **Approve Requests** from the To Do area on the Homepage. The Approve Requests screen will appear. The number next to Approve Requests in the left-side menu includes all Reqs. You can only approve or deny Reqs that require your approval.
3. Click an **ID** or **Title** to see the complete details of a request.
4. Click **Approve** to approve the Req or **Deny** to deny the Req.
5. If needed, enter comments for the preparer in the Comments field. If the Req is denied and a comment added, the preparer will have an opportunity to reply to the comment.
6. Click **OK**.
7. The Req will automatically default to the **Archive Label**. To choose a different Label check the **Archive Items** box and select a Label from the drop down menu.
8. If there are additional Reqs pending approval, the system will display the next Req.

### Searching for a Purchase Requisition

This function allows the Req creator to search for a particular order by designating specific search parameters.

**To run a filtered search:**

1. Click the **Purchasing** tab.
2. In the green toolbar click **Search**.
3. From the menu choose **Purchase Requisition**.
4. Complete the fields with known information.
5. For more filters click **Search Options**.
6. Click **Search**.
7. All Reqs fitting the parameters will appear below.

![Image of search filters and search results](image)

### Changing a Purchase Requisition

If a Req is in **Submitted** status, it can be edited by the active approver.

Note the following effects of **Editing** a Req.

- All prior approvals are cancelled
- The original value encumbered is adjusted back to the account.
- If the Req is re-submitted, the new total will be encumbered against the relevant account(s) accordingly.

**To edit a Req in Submitted status:**

1. Go to the **To Do** portlet and find the Req that needs editing.
2. To open the Req click the **ID** or **Title**.
3. Click **Edit**.
4. Edit the Req and click **Submit**.

![Image of summary panel](image)
**Edit Accounting**

This function allows the approver to charge different or multiple accounts in the same Req. Changing the default account will not update items already in the shopping cart.

**To edit accounting:**

1. Go to the line items section.
2. Check the left hand box of the item you want to modify. Or edit all items by checking the first box.
3. Click the `Edit` button. The Edit Line Item screen will appear.
4. Type the correct account number in the **Account** field.
5. Click **OK** or **Done**.

![Line Items Table]

**Split Accounting**

The account can be split by individual line item or by entire requisition.

**To Split Accounting:**

1. Go to the line items section.
2. Check the left hand box of the item you want to modify. Split all items by checking the first box. A check mark will appear in all boxes.
3. Click the `Edit` button. The Edit Line Item screen will appear.
4. Click **Split Accounting**. The Split Accounting screen will appear.
5. Select a method to split the accounting in the **Split By** drop down menu: Amount, Percentage or Quantity.
6. Type the other account number in the second Account field. Add a third split by clicking **Add Split**.
7. Enter the split amounts in the **Split Amount Column**.
8. Click **Update**. If your request contains invalid information, the screen will reappear with an error message.
9. Click **OK**. You will return to the Add Accounting Details screen or the Summary screen.
Edit Shipping

This function allows shipping separate items to multiple locations in the same Req.

To edit shipping:

1. Check the box next to the line item you want to edit, or check the top box to edit all items.
2. Click Edit.
3. Click the drop down menu of the Shipping Address field.
5. Leave the field as Name and type only the room number.
6. Click Search.
7. Click Select next to the correct location. If the address doesn’t appear, contact the UMeNET Helpdesk.
8. Repeat steps 1 through 7 for additional locations.
Viewing the Status of a Purchase Requisition

To view the status of a Req go to the **Purchasing** tab and find the **My Documents** portlet. The status appears in the **Status** column.

To view all Reqs click **View More**, then choose **Purchase Requisition**.

To organize all Reqs sequentially, click the ID, Title, Date, or Status header.

To view the complete details, click the **ID** or **Title**.

Sorting Purchase Requisitions

Copying Purchase Requisitions to a Label

Create Labels to organize Reqs of a certain criteria. Orders will be accessible for 10 years.

To create a Label:

1. Search for the Req to copy.
2. Check the box in the left hand side.
3. Click the **Label** button and choose **New Label**.
4. In the Enter New Label field, type a Label name such as "Lab Supplies for Dr. Bartow."
5. Click **Ok**.
6. The new Label will appear in the left hand column under "My Labels."
7. To view a Label's contents, click the label title.
Searching for a Label

To find a Label from the Purchasing tab:

1. Find the Search portlet.
2. Click Purchase Requisition.
3. Find My Labels.
4. To view all labels click More.

Reference

For future reference review the UMeNET online tutorials.

Congratulations!

You have completed the UMeNET Purchase Requisition Approver Tutorial.