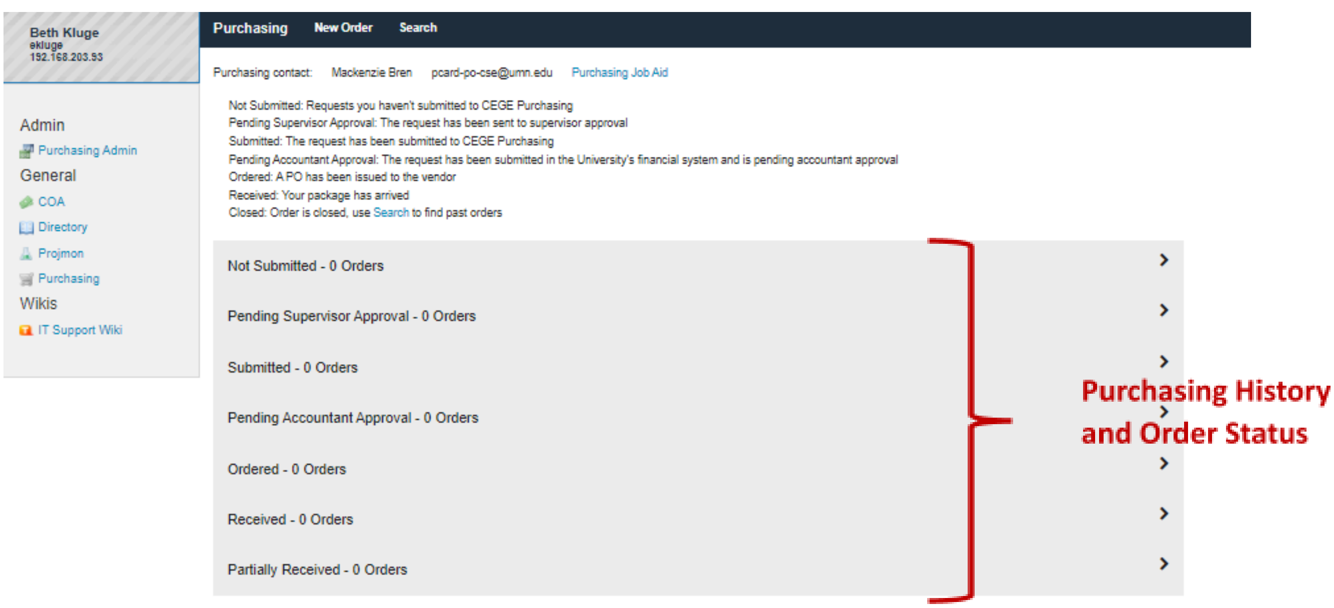
# Mechanical Engineering Purchasing Job Aid

The ePurch module (or ME purchasing app) should be used for all purchases made with vendors outside the University. The requirements for each are very similar, and where the process differs the details are included below. Please note that all of the information needed for University PO orders will be collected on this form.

****The exception is with U Market.** Shoppers should assign their carts to FinOps(finopsumarket@umn.edu) for processing, or first to their supervisor/faculty advisor for pre-approval as arranged by individual labs. They will review and re-assign carts to finopsumarket. Please note that U Market is the University's preferred vendor and should be used whenever possible; if the item is available from a different vendor (Best Buy, NewEgg) and is cheaper than or not available from U Market, **list that in the justification**. Be clear that U Market was checked first. This will help to expedite your order.

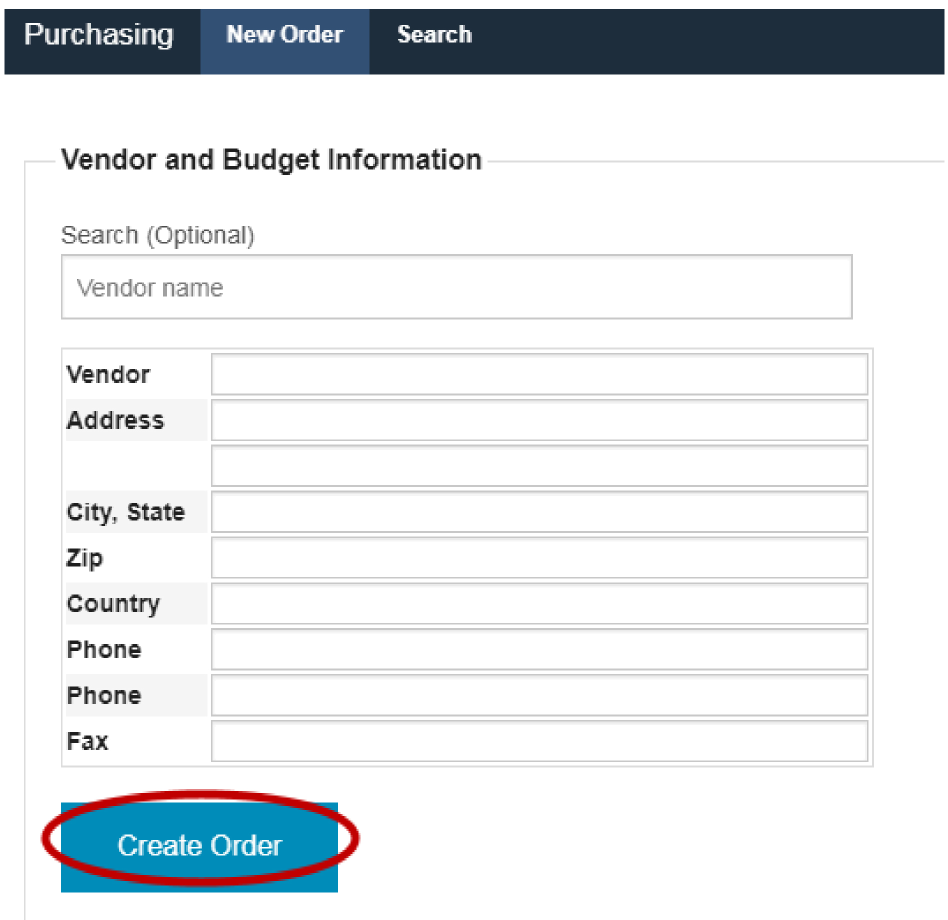
1. Go to https://me.intranet.cse.umn.edu/home/#/. You will be automatically logged in if you have system access. If you do not have system access, contact mepurch@umn.edu who can add you.
   a. NOTE: You will need to log in using a University VPN if you are using a laptop or working off-campus.

2. The Purchasing landing page is pictured below. From here, you can access this purchasing job aid, view your pending or past orders, and place new orders. To view your pending/past orders, you can select each status to view what stage in the process the request is at.

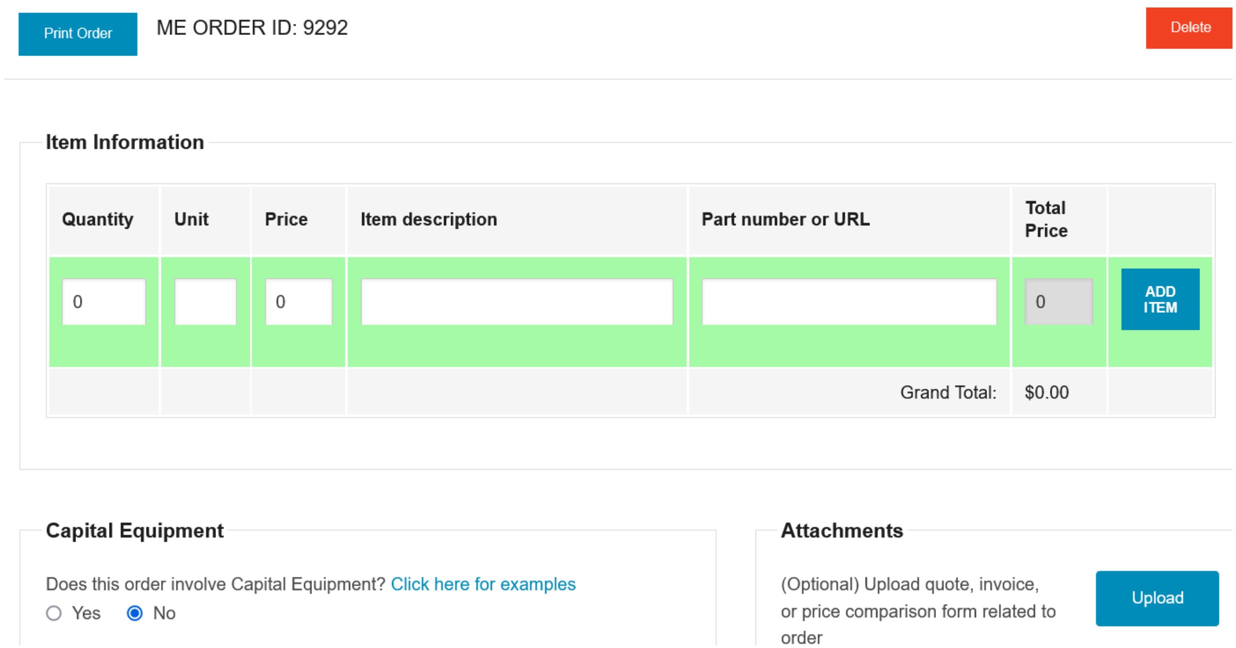


3. To create a new order, click the new order link at the top of the screen.


4. On the next page, type in as much vendor information as you can. The fields on this page allow the Mechanical Engineering purchasing coordinator to properly identify your vendor in the UMN system. Failure to give complete and proper information will delay your purchase. Click create order after you've input the vendor information. NOTE: As the system is used, the searchable vendor list will grow.
    a.



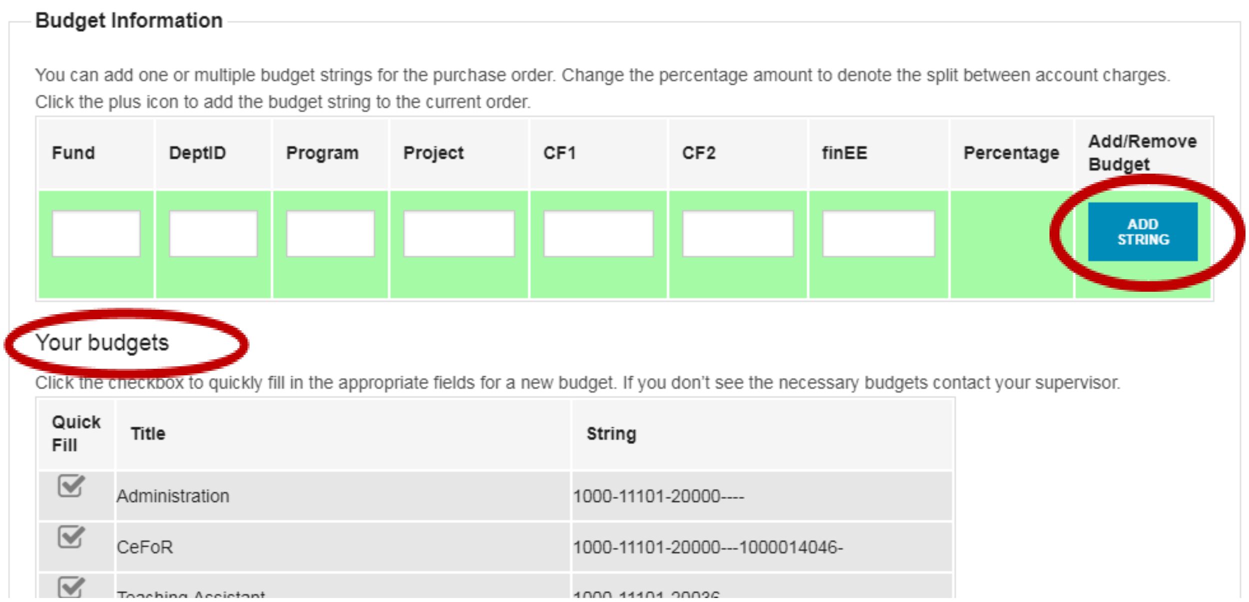
5. On the next page you will identify what you want to purchase. Complete the following fields: quantity, price*, item description and part number/URL. Click add item to add the item to your purchase order request. If you do not click "add item," it will not be added to your request.




*If your purchase is for a piece of equipment costing more than $5,000, please note that you are purchasing capital equipment (see image above). There is a link that you can click to see examples. If you are ever unsure, please reach out to mepurch@umn.edu if you have any questions. A Capital Equipment Asset Receipt Form (CEAR form) will be required for all capital assets, and purchasing staff will provide the form and guide you through this process.

6. As much as possible, please add an attachment in support of your purchase to document costs (quotes, screenshots, URLs). You may also include additional attachments such as invoices or price comparison form (see above). If more information is needed from you to process your request, you will receive an email from mepurch@umn.edu requesting the additional information.

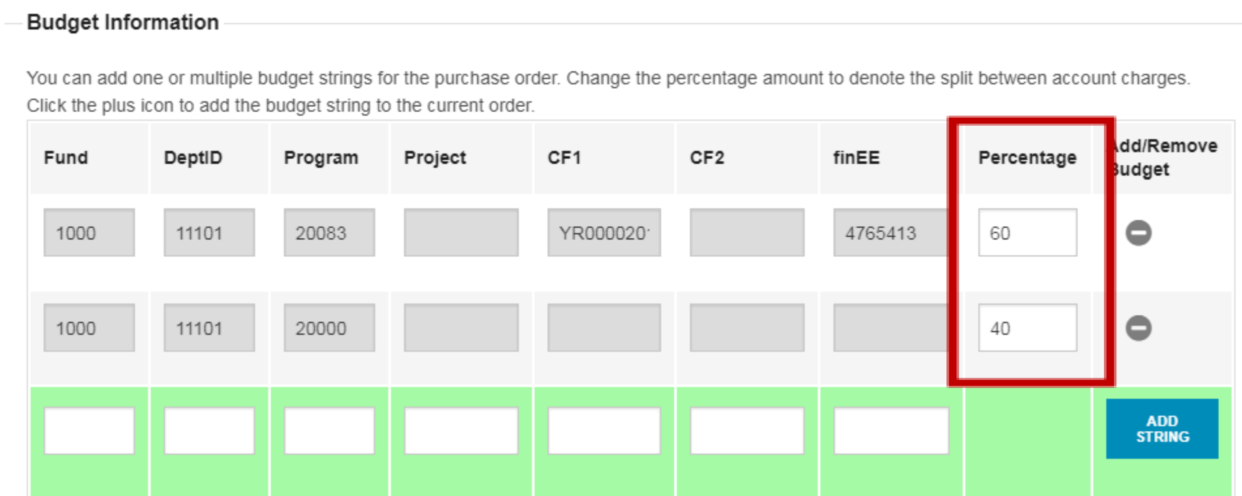
7. Any account (aka chartstring, account string, EFS string) that you can utilize for purchases will be listed in your budgets section of the page. You can click the account you want to use and it will auto-populate the budget information section. After the information is populated in the budget information, click add string. Click "Add string" to add the accounting information to your purchase order request. If you do not click "Add String," it will not be added to your request.




8. There may be times when you will need to provide an account not found in your budgets list. Always get prior approval from the account owner before using someone else's account. You will see two different kinds of accounts, one related to sponsored research and one related to non-sponsored funds (aka discretionary accounts).

   <u>SPONSORED ACCOUNT EXAMPLE:</u> 3002 (Fund), 11101 (DeptID), 00011111 (Project)
   <u>NON-SPONSORED ACCOUNT EXAMPLE:</u> 1026 (Fund), 11103 (DeptID), 20232 (Program), UMF0002083 (CF1), 1234567 (finEE)

9. You can split the cost of your purchase order across two or more accounts. Once you add two or more accounts, a new field for percentage will open up. The percentage field tells the ME purchasing coordinator what percent of the order should be allocated to each account. The percent totals must add up to 100%.



**Budget Information**

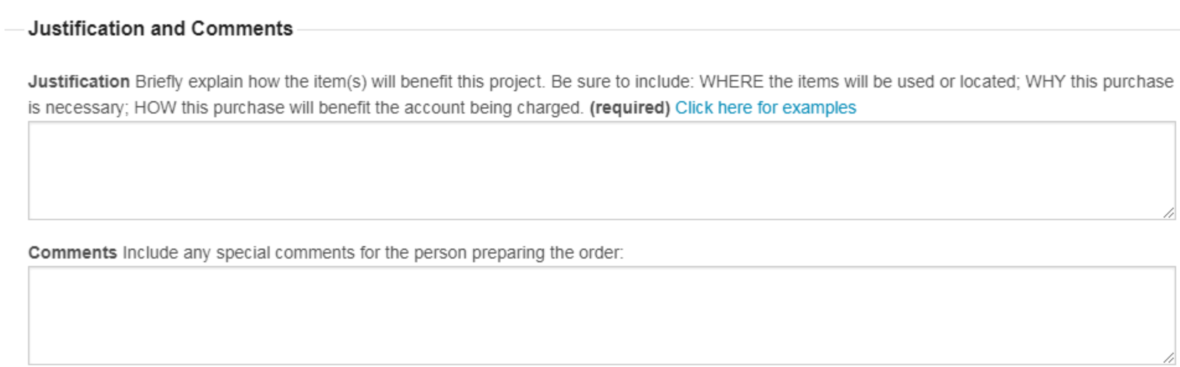
You can add one or multiple budget strings for the purchase order. Change the percentage amount to denote the split between account charges. Click the plus icon to add the budget string to the current order.

| Fund | DeptID | Program | Project | CF1 | CF2 | finEE | Percentage | Add/Remove Budget |
|---|---|---|---|---|---|---|---|---|
| 1000 | 11101 | 20083 | | YR000020 | | 4765413 | 60 | |
| 1000 | 11101 | 20000 | | | | | 40 | |
| | | | | | | | | ADD STRING |

10. Complete the justification and comments section. A good justification will provide detail, in non-scientific language, about what is being purchased, what it will be used for, how it will benefit the University and/or research project, who will be using it, and where it will be used. There is a link to provide examples of good justifications for guidance. If you have any special comments (expedited shipping, a vendor quirk, etc.), there is a box for those.

11. Included in the justification section be certain to include thorough shipping information:

    - Delivery P location (The Mechanical Engineering Building's Shipping & Receiving P-Location Code is P111350001. If you are delivering off-site or to another space outside of the ME building, please reference the P-Codes Location List to find your delivery location.)
    - Delivery address (the ME building is 111 Church Street SE, Minneapolis, MN 55455)
    - Lab/room number (this is to help Shipping & Receiving direct your package to the correct place once it arrives in our building)
    - Recipient name (also to assist Shipping & Receiving)
    - PI name (this is to assist Accounting with expediency of approvals)

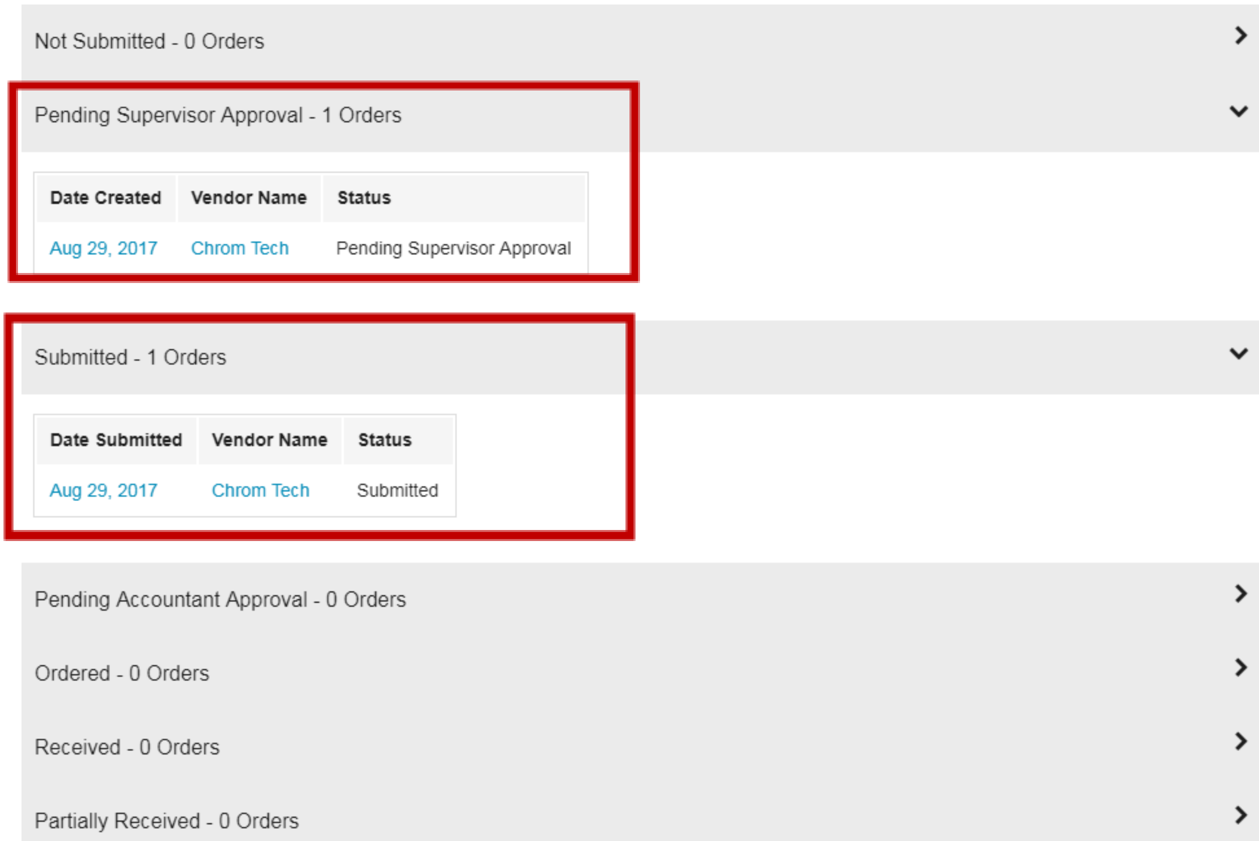


**Justification and Comments**

**Justification** Briefly explain how the item(s) will benefit this project. Be sure to include: WHERE the items will be used or located; WHY this purchase is necessary; HOW this purchase will benefit the account being charged. **(required)** Click here for examples

**Comments** Include any special comments for the person preparing the order:

12. After you click either submit to approver or submit order (whichever is appropriate), you will be routed back to the purchasing main page and you will see your order in either the pending supervisor approval (if you submitted to an approver) or in the submitted section.




13. You should always be able to find the status of your purchase order request on the main page. When shipping and/or delivery information is made available, those details will be added to the “comments” section on your request as well. If you have any questions or concerns about a particular order, please email mepurch@umn.edu.
    a. *Common issue with PEAK Purchasing transition: items may stay in “Pending Accountant Approval” even after the purchase has been made. This is because the status change from “Pending Accountant Approval” to “Ordered” requires a manual update, and our purchasing team doesn’t always receive notification that the purchase has gone through. Please reach out to mepurch@umn.edu if an order seems stuck.

14. Once your order arrives to Mechanical Engineering you will receive an email letting you know to pick up your package in the copy/mail room in the main office.

15. Immediately open and inspect your package to ensure the correct items and correct quantity were received. You will be prompted to confirm receipt of delivery:

a. Watch for emails from “TeamDynamix” with the subject line: “Service Request #xxxxxxx Pending Response:”. These are the ones that require your attention.

b. You must confirm receipt of goods/services promptly. Payment to the vendor is not released until you confirm receipt in the system.

c. If you know there will be a delay (e.g., equipment needs installation or testing), reply to the first email with a clear timeline so FinOps can pause follow-ups until that date.

d. You can respond either by replying to the email or by commenting directly in the TDX ticket. Both methods route your response to FinOps.