

# IMET



## IPS

# IMET Purchasing System

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## **IMET PURCHASING SYSTEM (IPS)**

The electronic IMET Purchasing System is an IMET initiative to create a more efficient and environmentally friendly system for submitting Requisitions for Purchase. This system will replace the existing paper “Requisition for Purchase Form,” with an electronic form for creating and submitting purchase requisitions, including the PI/faculty approval process.

The IPS system will permit you to submit a requisition using:

- single line item entry (like on the Purchase Requisition Form);
- a vendor quote via attachment; or
- a shopping cart link

This manual will walk you through the procedures for submitting purchase requisitions, using IPS. If you have any questions about IPS or purchasing, please contact your IMET Administrative Office (UMB, UMBC or UMCES).

### **User Definitions in IPS:**

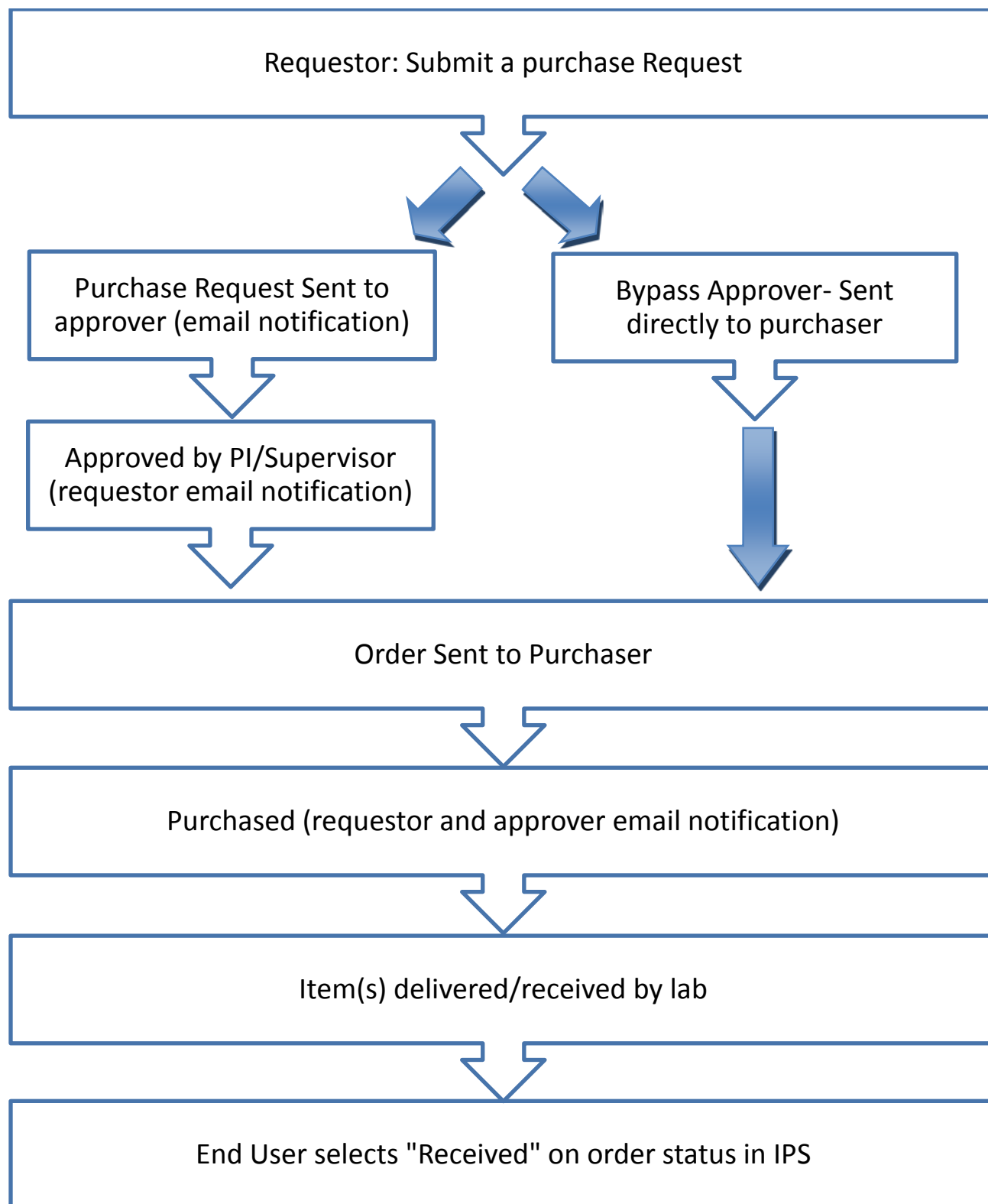
**Requestor:** person creating the order in IPS

**Approver:** PI/Faculty member of the grant/account

**Requestor with Bypass Approval:** person creating the order in IPS, who has been given authority to make a purchase on a specific account(s) up to \$1,000, without prior approval from the PI (requestor should obviously still have written or verbal approval from the PI to place the order)

**Purchaser:** UMCES-IMET Administrative Staff (Suzanne, Sam and Monica) who will place the order with the vendor, once the order is approved by the PI, if applicable

## IPS Overview of Process



## IMET PURCHASING SYSTEM (IPS)

### USER MANUAL

To log in, go to <http://ips.usmd.edu>.

Enter your user name, password and location (your IMET Department). If you don't have a password, please click on request one by clicking on "please click here to request one" above the user name field, or contact someone in the UMCES-IMET Administrative Office.

**Welcome to the IMET Purchasing System (IPS)**

Type in your assigned username and password below. If you do not have a username and password, or you have forgotten your username or password, [please click here](#).

Username or Email Address:

Password:

Location:

Stay logged in: ☐

[I forgot my password](#)

After you have logged in you will see the following screen. In order to create and submit a purchase request, click in the "Submit a Purchase Request" link to fill out the purchase request. All fields marked with a "\*" are mandatory.

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The IMET Purchasing System (IPS) 1.4.4.0

Welcome, Monica Chacon. Please select from the following menu

- [Submit a Purchase Request](#)
- [Purchase Items from a Purchase Request](#)
- [Inventory Items](#)
- [Approve Request for any FRS](#)
- [Manage Account Numbers and Executions](#)
- [Manage Vendor List](#)
- [Recover deleted request](#)
- [Administrate IPS](#)
- [Search Requests](#)
- [Change your password](#)
- [Logout of IPS](#)

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# **SUBMIT A PURCHASE REQUEST**

**(Requestor and Bypass Approvers)**

## SUBMIT A PURCHASE REQUEST

**Submit a purchase request**

\*Indicates required information.

Requestor\* Account Number\* Second Account Number IPS Number Status

cchacon New

If More than one account is being charged, please provide the dollar amount or percentage of purchase to be charged to each account in the Special Instructions/Notes field.

**Requested Vendor Information**

Select a Vendor\* Select a Vendor

Vendor Name

Vendor URL

Vendor Description

1. **Choose account number.** The account number is the project where you wish to charge this purchase. The title of the project is listed directly next to the account number. Use the drop down box to select. If you do not see the account number/project you need, please your department's Administrative Office.
2. **Choose a second account number** if the purchase is going be split into two projects. Please provide the dollar amount or percentage of purchase to be charged to each account in the **Special Instructions/Notes** field at the bottom of the screen. If the order is to be split over more than 2 accounts, please note the additional account(s) and dollar amount or percentage to be charged in the requestor notes section.
3. **Select a Vendor.** If the vendor you have chosen does not show in the options display in the drop down box, select "new vendor" and enter its information.

## **ORDER INFORMATION SECTION:**

To place an order by entering individual line items, **go to #4, page 8**

To place an order by attaching a quote, **go to #5, page 9**

To place an order using a shopping cart link, **go to #6, page 10**

## #4 ORDER INFORMATION-INDIVIDUAL LINE ITEM ENTRY

The screenshot shows a web form titled "Order Information". At the top, it says "Please enter your order information then click 'Add Item(s)' to add the line to your order". Below this is a table with five columns: Qty, Unit, Item Number, Description, Unit Price, Total Price, and Action. There are five rows of input fields. Below the table is a button labeled "Add Line Item".

Below the table, there is a section titled "To Place an Order with a Quote: Please upload a copy of the quote here. Complete the order with the following information: Quantity and Unit as 1, and enter the total quoted price as the unit price. Write 'See attached quote' in the Description field." Below this text is a "Choose File" button, a text area showing "No file chosen", and an "Upload" button.

Below the file upload section, there is a text area with the prompt "Enter link to shopping cart or items to purchase here. Include pricing information in the table above." and a text input field.

On the right side of the form, there are three input fields for "Miscellaneous charges:", "Shipping and Handling charges: (enter 1.00 if unknown)", and "Tax Charges (exempt for State of MD)". Below these is a "Total order price:" field showing "\$0.00".

Red arrows and labels point to specific fields:

- 4a: Qty
- 4b: Unit
- 4c: Item Number
- 4d: Description
- 4e: Unit Price
- 4f: Total Price
- 4g: Miscellaneous charges, Shipping and Handling charges, and Tax Charges (grouped by a bracket)
- 4h: Total order price

### 4. TO ENTER YOUR ORDER BY INDIVIDUAL ITEM:

Enter the following information for each item (screen shot on next page):

- Quantity:** how many units of the item needed
  - Unit:** specific Individual item/50 pack/ case/ kit etc.
  - Item Number:** Item's catalog/product number
  - Description:** Describe the item to be purchased (its name, i.e. beakers)
  - Unit Price:** enter the price of each unit
  - Total Price:** this field will automatically calculate
- There are 5 lines available automatically for your order. If you need to add additional items, click "Add Line Item" below the 5<sup>th</sup> line and fill in the fields listed above.
- Misc. Charges/Shipping/Tax:** State any additional miscellaneous charges; for shipping and Handling charges enter 1.00 if you are not sure of the shipping/handling charge amount; leaving it at 0.00 tells us it is FREE shipping
  - Total order price:** this field will automatically calculate



## #5 ORDER INFORMATION-USING A QUOTE

**Order Information**

Please Enter your order information then click 'Add Item(s)' to add the line to your order

Qty*	Unit*	Item Number*	Description*	Unit Price*	Total Price*	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>

**5g** { To Place an Order with a Quote: Please upload a copy of the quote here. Complete the order with the following information: Quantity and Unit as 1, and enter the total quoted price as the unit price. Write "See attached quote" in the Description field.

Click 'Choose File', select the file from your documents, then click upload.

No file chosen

Enter link to shopping cart or items to purchase here. Include pricing information in the table above.

Miscellaneous charges:

Shipping and Handling charges: (enter 1.00 if unknown)\*

Tax Charges (exempt for State of MD)

**5h** {

Total order price:

**5i** ←

### 5. TO PLACE AN ORDER WITH A QUOTE:

- Quantity:** enter 1 on the first line for item entry
- Unit:** enter 1 on the first line for item entry
- Item Number:** enter quote number
- Description:** type "See attached quote"
- Unit Price:** enter total quote price
- Total Price:** this field will automatically calculate
- To Place An Order with a Quote section:** below the 5 default item entry lines, click 'Choose File', select the file from your documents, then click upload
- Misc. Charges/Shipping/Tax:** State any additional miscellaneous charges; for shipping and Handling charges enter 1.00 if you are not sure of the shipping/handling charge amount; leaving it at 0.00 tells us it is FREE shipping
- Total order price:** this field will automatically calculate

## #6 ORDER INFORMATION-USING LINK FOR A SHOPPING CART

**Order information**  
Please enter your order information then click "Add Item(s)" to add the line to your order

Qty*	Unit*	Item Number*	Description*	Unit Price*	Total Price*	Action
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Delete"/>

**To Place an Order with a Quote:** Please upload a copy of the quote here. Complete the order with the following information: Quantity and Unit as 1, and enter the total quoted price as the unit price. Write "See attached quote" in the Description field.

Click 'Choose File', select the file from your documents, then click upload.

No file chosen

Miscellaneous charges:  **6h**

Shipping and Handling charges: (enter 1.00 if unknown)\*

Tax Charges (exempt for State of MD)

**Total order price:**  **6i**

Enter link to shopping cart or items to purchase here. Include pricing information in the table above.

**6g**

### 6. TO PLACE AN ORDER USING A SHOPPING CART LINK:

- Quantity:** enter 1 on the first line for item entry
- Unit:** enter 1 on the first line for item entry
- Item Number:** enter order number or if not available, enter a 1
- Description:** type "See shopping cart link"
- Unit Price:** enter total order price
- Total Price:** this field will automatically calculate
- To Place An Order with a Shopping Cart Link:** below the "Upload a Quote" section, there is a field to enter the link to a shopping cart; enter it here
- Misc. Charges/Shipping/Tax:** State any additional miscellaneous charges; for shipping and Handling charges enter 1.00 if you are not sure of the shipping/handling charge amount; leaving it at 0.00 tells us it is FREE shipping
- Total order price:** this field will automatically calculate

## JUSTIFICATION AND SPECIAL INSTRUCTIONS

The screenshot shows a web form for submitting a purchase request. It includes several text input fields and a button area. Red arrows with numbers 7, 8, and 9 point to specific fields:

- Arrow 7:** Points to the "Justification for how the items requested above relate solely to the grant(s) being charged" field.
- Arrow 8:** Points to the "Special Instructions (charges split between multiple accounts, rush order, radioactive materials, etc.):" field.
- Arrow 9:** Points to the "Submit this Request" button.

Below the form, there are sections for "Purchase Request History" and "Transaction User Timestamp Notes". The footer contains copyright information for the University of Maryland Center for Environmental Science.

7. Enter justification for how the items requested relate solely to the grant(s) being charged.
8. Include special Instructions like: charges split between multiple accounts, rush order, radioactive materials, etc
9. After entering all the information needed for your request and you are ready to review and submit your order, click the "Submit this Request" button.

## REVIEW AND SUBMIT ORDER SCREEN

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529018

**IPS Purchase Requisition**  
**Review Purchase Request**

[Submit this Request](#) [Edit this Request](#)

This purchase request is not yet submitted. Please review your request. If you need to make changes, click "Edit this Request" at the bottom of the page. If the request is correct, click "Submit Request".

<b>Vendor Information</b>	<b>Account Number</b>	<b>IPS Number</b>	<b>Requestor</b>
ABC Imaging 400 E. Pratt Street Baltimore, MD 21202 P: 410-779-4550 F: 410-779-4555 URL: www.abcmaging.com	529018		

Quantity	Unit of Quantity	Item Number	Description	Unit Price	Total Price	Quantity Received
1	1	123456	Gels	\$50.00	\$50.00	0
				Miscellaneous charges:	\$0.00	
				Shipping and Handling charges:	\$0.00	
				Tax charges:	\$0.00	
				Total order price:	\$50.00	

Requestor's Justification: To conduct experiments  
Requestor Notes:  
Approver Notes:  
Purchaser Notes:

Purchase Request History

Transaction User Timestamp Notes

[Submit this Request](#) [Edit this Request](#)

10. A review screen will show up. **Please review your order**, if you need to edit any information click the "Edit this Request" button and edit your order. When you are ready to submit the order, click the "Submit this Request" button again. If your order requires your PI/faculty member to approve it, they will receive an email requesting their approval in IPS, right after the order has been submitted by the requestor. Emails will be sent to the administrative office to process this purchase, once approved. If you have bypass approval status and your order is for less than \$1,000, it will automatically go to the UMCES-IMET Administrative Office for purchasing. Once the UMCES-IMET Administrative Office purchases the order and codes it as purchased in the IPS system, the requestor and approver will both receive an email stating the ordered has been purchased.

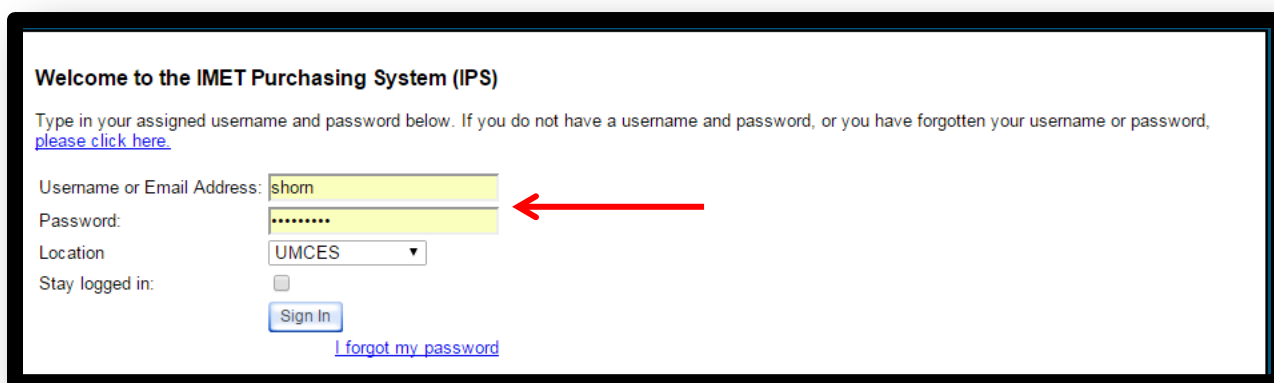
# **APPROVE A PURCHASE REQUEST**

**(PI Approval)**

## APPROVE A PURCHASE REQUEST

To log in, go to <http://ips.usmd.edu>.

Enter your user name, password and location (your IMET Department). If you don't have a password, please click on request one by clicking on "please click here to request one" above the user name field, or contact someone in the UMCES-IMET Administrative Office.



**Welcome to the IMET Purchasing System (IPS)**

Type in your assigned username and password below. If you do not have a username and password, or you have forgotten your username or password, [please click here](#).

Username or Email Address:

Password:

Location:

Stay logged in: ☐

[I forgot my password](#)

After you have logged in, you will be taken to the IPS Main Menu.



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The IMET Purchasing System (IPS) 1.4.4.0

Welcome, Allen Place. Please select from the following menu

- [Submit a Purchase Request](#)  
1 requests awaiting approval  
6 requests awaiting purchase
- [Modify an open Purchase Request](#)  
1 requests awaiting approval  
4 rejected requests  
6 requests awaiting purchase
- [Approve or Reject Pending Purchase Requests](#)  
1 Requests pending for 525018 (PCM NOAA)
- [Receive a Purchase Request](#)  
7 requests awaiting receipt
- [Search Requests](#)
- [Change your password](#)
- [Logout of IPS](#)

1. In order to approve a purchase request, click in the "Approve or Reject Pending Purchase Requests."

Return to main menu

The IMET Purchasing System (IPS)

Filter by...

Status: Pending Requestor: All Date: to Search

Results

Account #	Requestor	Vendor	IPS #	Status	Request Date	Latest Transaction Date	Latest Transaction	
529018	watsona	ABC Imaging	0027	Pending	7/25/2013 5:23:15 PM	7/25/2013 5:23:15 PM	Opened	<a href="#">View</a>

2. Search for the purchase request by “requestor” or by range of dates. Select the purchase request to be approved and click the “View” button to the right to review it.

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The IMET Purchasing System (IPS)

[Return to main menu](#)

### Update or Approve Pending Purchase Requests

Indicates required information:

Requestor:  Account Number:  Second Account Number:  IPS Number:  Status:

If more than one account is being charged, please provide the dollar amount or percentage of purchase to be charged to each account in the Special Instructions/Notes field.

Requested Vendor Information:

Select a Vendor:  Vendor Name:  Vendor URL:

### Order Information

Please Enter your order information then click 'Add Item(s)' to add the line to your order

Qty	Unit	Item Number	Description	Unit Price	Total Price	Action
1	1	123456	Gels	50	\$50.00	<a href="#">Delete</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Delete</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Delete</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Delete</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Delete</a>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Delete</a>

[Add Line Item](#)

To Place an Order with a Quote: Please upload a copy of the quote here. Complete the order with the following information: Quantity and Unit as 1, and enter the total quoted price as the unit price. Write "See attached quote" in the Description field.

Click "Choose File", select the file from your documents, then click upload.

Choose File:  Upload:

Miscellaneous charges:  Shipping and Handling charges: (enter 1.00 if unknown)  Tax Charges (exempt for State of MD)

Total order price:

Enter link to shopping cart or items to purchase here. Include pricing information in the table above.

Justification for how the items requested above relate solely to the grant(s) being charged:

To conduct experiments

Special Instructions (charges split between multiple accounts, rush order, radioactive materials, etc.):

Approver's Notes:

[Save Changes to this Request](#) [Approve this Purchase Request](#) [Reject this Purchase Request](#) [Printer-friendly version](#) [Return to Main Menu](#)

### Purchase Request History

Transaction User	Timestamp	Notes
Created Aaron Watson	7/25/2013 5:25:15 PM	To conduct experiments

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### 3. Review the purchase request and take action needed:

- If the request is correct** click the **"Approve this Purchase Request"** button and your order will be sent to the UMCSE-IMET Administrative Office for purchase. Once the UMCES-IMET Administrative Office purchases the order and codes it as purchased in the IPS system, the requestor and approver will both receive an email stating the ordered has been purchased.

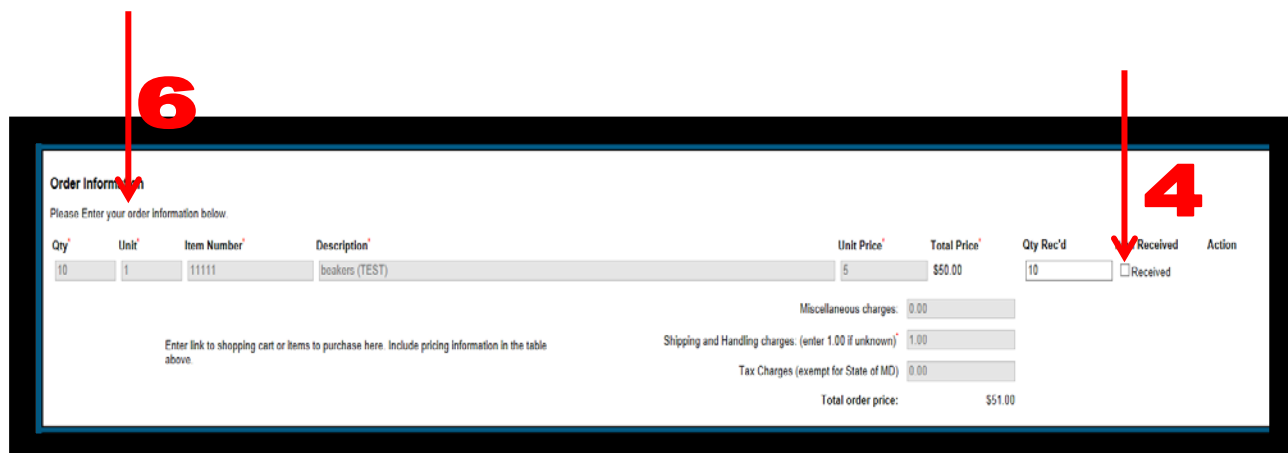


- b. **If the request needs editing** you can do that directly on this screen. “Approver Notes” are mandatory when this action has been taken—you must note what you changed and then click the “Approve this Purchase Request.”
- c. **If you decide you want to reject this request**, you are required to add notes to the “Approver Notes” section, and then click the “Reject this Purchase Request” button.

# **“Receiving” an Order in IPS Once Delivered/Received by the Lab**

**(Requestor or PI)**





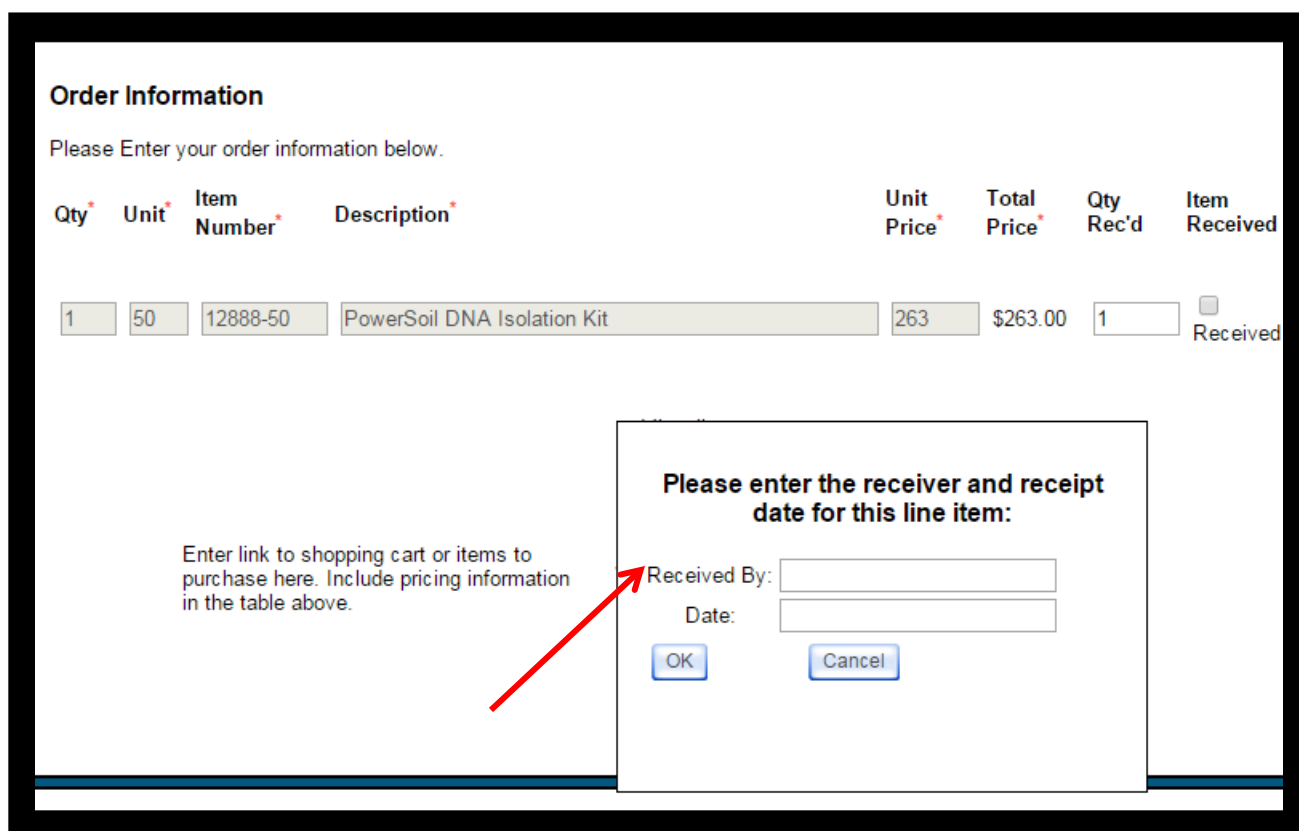
**Order Information**  
Please Enter your order information below.

Qty*	Unit*	Item Number*	Description*	Unit Price*	Total Price*	Qty Rec'd	Received	Action
10	1	11111	beakers (TEST)	5	\$50.00	10	<input type="checkbox"/> Received	

Miscellaneous charges: 0.00  
Shipping and Handling charges: (enter 1.00 if unknown) 1.00  
Tax Charges (exempt for State of MD) 0.00  
Total order price: \$51.00

Enter link to shopping cart or items to purchase here. Include pricing information in the table above.

4. Click the “Item Received” check box next to the item(s) you are receiving. NOTE: only check off the lines for the items that have actually been received. If the order is shipping in separate shipments, then you can check off the other items later, once they are received.
5. Add the name of the person who received the item and the date it was received in the pop up box.



**Order Information**  
Please Enter your order information below.

Qty*	Unit*	Item Number*	Description*	Unit Price*	Total Price*	Qty Rec'd	Item Received
1	50	12888-50	PowerSoil DNA Isolation Kit	263	\$263.00	1	<input type="checkbox"/> Received

Enter link to shopping cart or items to purchase here. Include pricing information in the table above.

**Please enter the receiver and receipt date for this line item:**

Received By:

Date:

OK Cancel

6. Scroll to the bottom, then click the “Save Changes to this Request.” NOTE: You must save.
7. A pop up will appear confirming your changes have been saved, and once you click the ok button, you will be redirected to the main menu, where you can sign out, etc.