

MSCM / PMM

Purchasing Buyer's Guide

RESOURCES

UMeNET vs PMM: <https://umshare.miami.edu/web/wda/purchasing/UMeNET/UMeNETvsPMM.pdf>

PROCESS MAP:

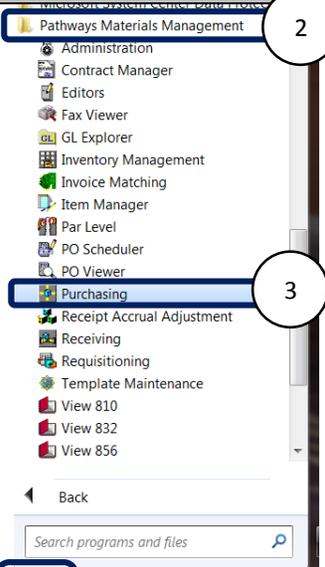
The clinic creates and submits a Purchase Requisition. Then the requisition goes to "the Bucket" where the buyers can view a Requisition and turn it into a Purchase Order.

Finding the Horizon Module:

1. Click the Start menu in the lower left hand corner of your screen and choose **All Programs**.



2. Click **Pathways Materials Management**.



3. Click **Purchasing**.

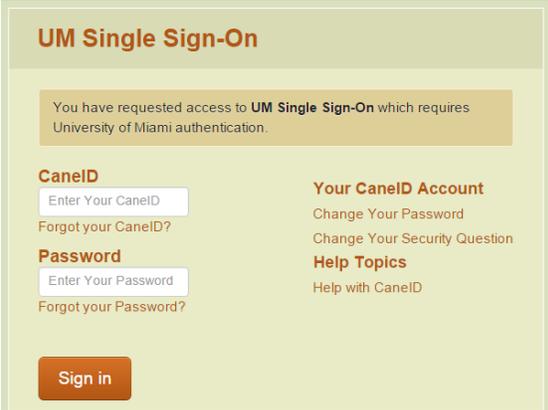


Logging in:

Log in using your CaneID user name and password.

Hint: This is the same username and password used to log into Outlook and Workday (benefits and time off requests).

Forgot your password? Contact UM Security at 8-6565. Follow the prompts for CaneID.



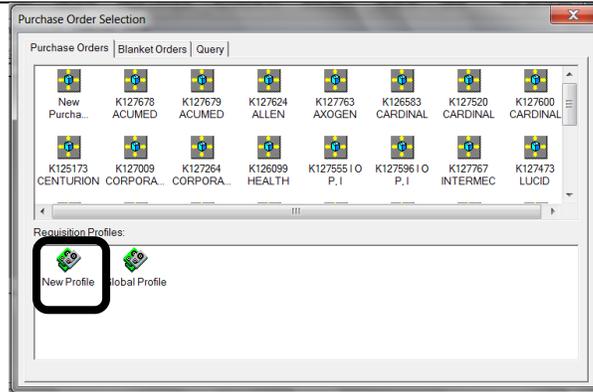
Managing the Purchasing Inbox:

Creating Profiles:

Create profiles to find requisitions that you are responsible for processing. This functions like a saved search. For example if you are responsible for ABLEH Sleep Center, Aesthetic Center, and Aspen Meeting, create a profile for each of these cost centers in order to search quickly for all pending orders.

Purchase Order Selection

Double click
New Profile.

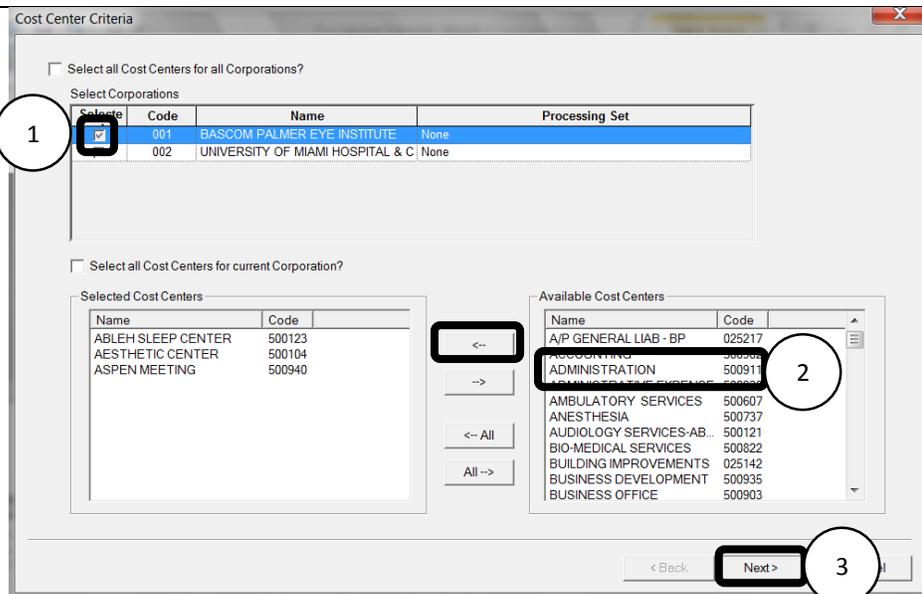


Cost Center Criteria

1. Select the corporation.

2. Add the cost centers. For example, click **ADMINISTRATION**. To add, click the left arrow. Repeat this step to add each cost center.

3. Click **Next**.



Vendor Criteria

Check the **Select All Vendors** box.

Click **Next**.

Vendor Criteria

Where Field: Vendor Name Search

Begins with Value:

Select all vendors

Selected Vendors

Name	Code
------	------

Available Vendors

Name	Code
------	------

<- -> <- All All ->

< Back **Next >** Cancel

Commodity Code Criteria

Check the box next to **Bypass Commodity Code filter**.

Click **Next**.

Commodity Code Criteria

Where Field: Commodity Code Search

Begins with Value:

Bypass Commodity Code Filter

Selected Commodity Codes

Name	Code
------	------

Available Commodity Codes

Name	Code
------	------

<- -> <- All All ->

< Back **Next >** Cancel

Search Criteria

Click **Next**.

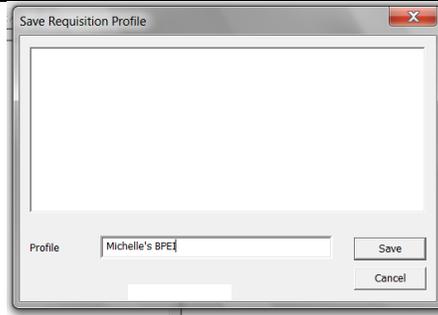
PO Wizard
Click **Yes**.

Save Requisition Profile
Click **Finish, & Yes**.

Save Requisition Profile

Give the profile a Title that includes your name, such as "Sebastian BP Surg"

Click **Save**.



Managing the Purchasing Inbox: (aka the "bucket")

Turning line items into a Purchase Order. (aka "Flipping a req")

Find all the items for a single vendor and create one Purchase Order.

Note, items may appear on multiple requisitions.

Select the Vendor and expand until the item number appears.

*For non-catalog items, obtain approval prior to ordering. Check the HPG website for the item or a comparable item, then send the information to Gigi Nunez-Perez for approval. These items must remain in the bucket until approval is received.

Item	Description	Status	Vend. Ctg	Qty	UM
<input type="checkbox"/>	20698 ANTI STATIC WEIGHL...	Pending PO	3421	1.0	PK
<input type="checkbox"/>	non-cata... BASIC CHEMO SPILL ...	Pending PO	9961-01	1.0	BX

At the bottom of the interface, there are three buttons: '< Back', 'Finish', and 'Cancel'. The 'Finish' button is circled in red in the final screenshot.

From the item number(s), select the item/select all and click **Finish**.

- Update the "Classification" field.
- Update the "Ship To" field.
 1. There are several shipping locations. If the order is supply source, use the Warehouse Receiving address. Some lab products can require refrigeration, and may take several days to arrive at the correct location. Therefore, if the item is a specialty product for Deerfield, Plantation, Kendall, or Coral Springs, ship direct to that location.
 2. *Vendor Information* - Are there storms in the vendor's area that may affect shipments?

Check the **Display Cover Sheet** box and click **OK**.

The basic work for this purchase order is complete. Click **Submit**.

A message will appear stating that you have successfully submitted the PO.

Click **OK**.

Reporting

Click the Reporting icon in the header menu.

Click the + next to Purchasing.

Make the following selections.

- PO Start Date (Calendar Date and Time)
- PO End Date (Calendar Date and Time)

Click **Run Report**.

The summary page will appear.

Double Click the **yellow box** for details.

CHECKLIST:

- View comments from the requisition creator/departmental approvers
- Formulary 2, 3, and 4 – look for alternatives that are formulary 1. Notify requisition creator.
- Communicate with the end-user.
- Communicate with the vendor.