Strategic Offset Printing Program

Customer Tutorial
Summary of Changes

• Programming Changes
  • Email notices sent from the message board to suppliers and customers, now include the actual message.
  
  • When the project requires an Approver and/or Sponsored Fund/Procurement Services approval, the selection made by the requestor will stay populated. The Approver should only need to “Confirm Selection” and “Notify the Supplier”.

  • Customers can now view the winning quote from “Completed Projects”. Click on the link provided to see the suppliers submitted quote.
Summary of Changes

• Forms
  • There is only one print form and one mail form and those have been reformatted.
  • Reply envelopes have been added to the mail form.
  • Dept ID was added to the criteria in the drop down list of contacts.

• View Only Permissions
  • You can now allow approved people to view the projects throughout the entire process including “View Specific Quote History” & “Completed Projects”.

Version 2.5 Revised 4.23.15
Summary of Changes

• Audit compliance
  • To meet audit requirements the final approval will need to be made by an ePro Req User.
  • If you are not an ePro Req User you will need to assign each project to the appropriate approver for your department.
SOOP Login Page

Log into the SOOP website at:
https://mbiz bf.umich.edu/procurementapp/printingsvcs/offset_login.cfm

• To begin “Click Here to Start.”
• If you are already logged into Mpathways, you will not see this screen.
Main Menu

This is the Main Menu. We will cover each link in more detail on the following slides.

If you are not an ePro Req User, you will see this message when you log in.

This means you will need to assign your project to an ePro Req User for final approval.
Quote a New Print Project/ Retrieve Saved Quotes

Once you enter all of your contact information the system will remember you and you can easily populate your information from the drop down list on future orders.

To create a new quote using previous quote information, enter a previous quote number here and click the “Populate” button.

To retrieve a saved quote, click the drop down menu and select a quote number then click the “Retrieve” button.

Dept ID is required for reporting purposes.

Every time you place an order, retrieve a saved quote, or populate a quote with previous information, you will be required to enter a ShortCode(s), select a Quote Due Date and a Job Due Date.
### Quote a New Print Project/ Retrieve Saved Quotes

#### 2. Job Specifications

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Title</td>
<td></td>
</tr>
<tr>
<td>Due Date</td>
<td></td>
</tr>
<tr>
<td>Quantity</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td>(limited to 10 lines)</td>
</tr>
<tr>
<td>Finished Size</td>
<td>(limited to 3 lines)</td>
</tr>
<tr>
<td>Flat Size</td>
<td>(limited to 3 lines)</td>
</tr>
<tr>
<td>Page Count</td>
<td>(limited to 3 lines)</td>
</tr>
</tbody>
</table>

All of these fields require information.

It is very important to include as many details as possible in order to receive quality quotes from the suppliers without many questions.

It is extremely beneficial to upload a PDF mock-up of your project if available (we will cover uploading files later).
### Quote a New Print Project/Retrieve Saved Quotes

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art/Scans (limited to 3 lines)</td>
<td></td>
</tr>
<tr>
<td>Proofs (limited to 3 lines)</td>
<td></td>
</tr>
<tr>
<td>Ink (limited to 6 lines)</td>
<td></td>
</tr>
<tr>
<td>Bindery/Finishing (limited to 6 lines)</td>
<td></td>
</tr>
<tr>
<td>Packaging (limited to 2 lines)</td>
<td></td>
</tr>
<tr>
<td>Special Instructions (limited to 6 lines)</td>
<td></td>
</tr>
</tbody>
</table>

The more details you can provide, the better quality quotes you will receive.
Quote a New Print Project/ Retrieve Saved Quotes

**Warning:** The system will only send your quote information to the suppliers you select below: If the billing amount of your project is more than $10,000, you MUST select at least 3 suppliers from the following list.

You can now select one, some, or all of the SOPP suppliers to quote on your project.

**General rules for selecting suppliers:**

- Projects under $10,000- select one or more suppliers to bid.
- Projects over $10,000 – require a minimum of 3 suppliers to bid.

You can submit your quote now or save it and add more data before submitting for quotes.
Link to Mail Form

This is the message you will receive after successfully submitting a print project. Please note the assigned quote number provided.

Your offset printing project has been saved as quote 30136. Please record this quote number for future reference.

To view the details of any of your projects go to the "Main Menu". From there you are able to view bids, select winning supplier, start a new project or view bid history.

You will receive emails from ManagedOffsetPrinting@umich.edu when a supplier responds to your request.
The following suppliers(s) have been notified of your request:

EPI (Trish McIntosh 734-812-4692)
Arbor Oakland Group (Mike Fisher 248-549-0150)

If you would like to upload pdf files for this newly created quote please click here.

If you would like to create a related mailing quote for this printing quote, you may click here to continue to the "Quote Mail Form"

Back to main menu

After you have completed the print form for your project you can use this link to go to the mail form. The system will then link the two projects together for future reference.
Quote a New Mail Project/Retrieve Saved Quotes

Once you enter all of your contact information the system will create a profile and you can easily populate your information from the drop down list on future projects.

Every time you place an order, retrieve a saved quote, or populate a quote with previous information, you will be required to enter a ShortCode(s), select a Quote Due Date and a Job Due Date.
Quote a New Mail Project/Retrieving Saved Quotes

<table>
<thead>
<tr>
<th>Specifications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Job Title</strong></td>
</tr>
<tr>
<td><strong>Job Due Date</strong></td>
</tr>
<tr>
<td><strong>Quantity</strong></td>
</tr>
</tbody>
</table>

Please enter numbers only in "Qty" fields; do not include any letters or symbols. (Example: enter 10000 not 10,000)

<table>
<thead>
<tr>
<th>Component</th>
<th>Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Mail</td>
<td></td>
</tr>
<tr>
<td>International Mail</td>
<td></td>
</tr>
<tr>
<td>Campus Mail</td>
<td></td>
</tr>
</tbody>
</table>

- **Description**: (limited to 5 lines)

- **Proof Requested**
  - Need Proof
  - Qty

- **Mailing Class** (Check all that apply)
  - Nonprofit Mail
  - Standard Mail
  - First-Class (Automated)

- **Postage** (Check all that apply)
  - Permit (Indicia)
  - Stamped Mail
  - Metered Mail

All of these fields require information.

It is very important to include as many details as possible in order to receive quality quotes from the suppliers without many questions.

It is extremely beneficial to upload a PDF mock-up of your project if available (we will cover uploading files later).
Quote a New Mail Project/Retrieve Saved Quotes

The more details you can provide the better quality quotes you will receive.

<table>
<thead>
<tr>
<th>Item</th>
<th>Pages/Sheets</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reply card - personalized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reply Envelope</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Booklet</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brochure</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Buck Slip</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letter - generic</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Letter - personalized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reply card - generic</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Tabbing

Type: Transparent

Number of Mailing Data Files to Upload

Total number of files (Excel, Access and etc. containing addressing data)
(Please enter numbers only)

Special Instructions for Inserting and Mailing Process (Limited to 6 lines)
Quote a New Mail Project/ Retrieve Saved Quotes

You can now select one, several, or all of the SOPP suppliers to quote on your project.

General rules for selecting suppliers:

- Projects under $10,000- select one or more suppliers to bid.
- Projects over $10,000 – require a minimum of 3 suppliers to bid.

If this is part of a print project enter the print quote number here.

You can submit your quote now or save it and add more data before submitting for quotes.
Upload Print File

Please note that art files sent here are simply a rendition of style for supplier pricing. Final art files will need to be sent to the selected supplier following the award.

When uploading artwork, enter in your quote number.

Then select the “Browse” button and find your file.

If uploading more than one PDF file, once you click the “Add Another PDF File” another “Browse” link will be added.

Once all files are included, click the “Upload Now” button.
Upload Mailing Project Data

Please note that art files sent here are simply a rendition of style for supplier pricing. Final art files will need to be sent to the selected supplier following the award.

Upload Mail Addressing Files

When uploading addressing files, enter in your quote number.

Then select the “Browse” button and find your file.

If uploading more than one file, once you click on the “Add Another Addressing File” another “Browse” link will be added.

Once all files are included, click the “Upload Now” button.
View Quotes and Select Supplier

After all of the suppliers respond to your request or the due date has passed you will use this page to view all information provided.

### View Bids & Select Supplier (CARACARA)

<table>
<thead>
<tr>
<th>Quote Number</th>
<th>Status</th>
<th>Job Title</th>
<th>Quote Due Date</th>
<th>Supplier Response</th>
<th>Message Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>30135</td>
<td>Saved/Unsubmitted</td>
<td>Test Order #9</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>30121(Printing)</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>QTY</td>
<td>03/19/2014 5pm</td>
<td>1 [View Bids]</td>
<td>0</td>
</tr>
<tr>
<td>30117(Printing)</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>unique name</td>
<td>03/19/2014 5pm</td>
<td>1 [View Bids]</td>
<td>0</td>
</tr>
<tr>
<td>30113(Printing)</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>Testing</td>
<td>03/19/2014 5pm</td>
<td>1 [View Bids]</td>
<td>0</td>
</tr>
<tr>
<td>30110(Printing)</td>
<td>Bid Closed</td>
<td>Test DG 1</td>
<td>03/19/2014 5pm</td>
<td>1 [View Bids]</td>
<td>0</td>
</tr>
</tbody>
</table>

You can view a bid that has been returned by a Supplier by selecting the “View Bids” link under the Supplier Response.

You can also view any messages that come in on a quote by looking at the “Message Board”.

Back to main menu
### View Quotes and Select Supplier

#### Quotes Received from Suppliers for Quote 30113/Approver: ROBINCC

<table>
<thead>
<tr>
<th>Component</th>
<th>Qty1</th>
<th>Qty2</th>
<th>Qty3</th>
<th>Qty4</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST</td>
<td>10000</td>
<td>50000</td>
<td>20000</td>
<td></td>
</tr>
</tbody>
</table>

#### Supplier Responses (Hover over Supplier name below to view their performance ratings)

<table>
<thead>
<tr>
<th>Supplier</th>
<th>(View Pricing Detail)</th>
<th>Qty1</th>
<th>Qty2</th>
<th>Qty3</th>
<th>Qty4</th>
<th>Final Qty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print-Tech</td>
<td>(View Pricing Detail)</td>
<td>$30,000.00</td>
<td>$100,000.00</td>
<td>$48,000.00</td>
<td>$150,000.00</td>
<td>$150,000.00</td>
</tr>
</tbody>
</table>

- To start the approval process, award the project by selecting the supplier.
- View detailed pricing by component (next slide).
- View the supplier's quote document.
View Details

When viewing the detailed pricing sheet you can see the breakdown of the quote by component and quantity.

Quotes Received from Supplier for Quote **30113**

**Supplier:** Print-Tech

**Job Title:** Testing

<table>
<thead>
<tr>
<th>Component</th>
<th>Qty1</th>
<th>Price</th>
<th>Qty2</th>
<th>Price</th>
<th>Qty3</th>
<th>Price</th>
<th>Qty4</th>
<th>Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>TEST</td>
<td>10000</td>
<td>$30,000.00</td>
<td>50000</td>
<td>$100,000.00</td>
<td>20000</td>
<td>$48,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Postage/Shipping</td>
<td></td>
<td>$0.00</td>
<td></td>
<td>$0.00</td>
<td></td>
<td>$0.00</td>
<td></td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td></td>
<td>$30,000.00</td>
<td></td>
<td>$100,000.00</td>
<td></td>
<td>$48,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Note: This page opens as a second window please close this window when finished reviewing.*
View Quote and Select Supplier - Final selection process

After selecting the supplier you must:

**Final Qty Selection**

(Required)

<table>
<thead>
<tr>
<th>Component</th>
<th>Qty1</th>
<th>Qty2</th>
<th>Qty3</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>Letter</td>
<td>1000</td>
<td>3000</td>
<td>5000</td>
<td></td>
</tr>
<tr>
<td>Brochure</td>
<td>1000</td>
<td>3000</td>
<td>5000</td>
<td></td>
</tr>
<tr>
<td>Reply card</td>
<td>1000</td>
<td>3000</td>
<td>5000</td>
<td></td>
</tr>
</tbody>
</table>

Please select the final quantity for the production. The selected supplier is required to submit a new quote if you select "Other" with manually entered quantities.

**Confirm Specs as quoted**

(Confirm specifications as quoted by checking this box or provide additional information below)

**Notes/Changes to Specs**

(limit to 10 lines)

**If you do not select the lowest bid you are required to enter your reasons here for internal review.**

Enter a reason if not selecting the lowest bidder.

Your quote may need to be approved by an ePro Req User, Sponsored Funds, or a Procurement Agent (next slide).
View Quote and Select Supplier - Final selection process

Possible messages before final selection can be completed.

**Sponsored Funds approval required**

Because at least one "Sponsored Funds" shortcode listed for this project is "Sponsored Funds" the system may need to obtain approval from FinOps. Once you click the following button, system will calculate whether the Sponsored Fund has been charged over $5,000. If it is over $5,000 FinOps needs to approve your transaction before the final approval can be made.

Check Funding/Notify Supplier

There is at least one "Sponsored Fund" shortcode listed for this project and the total amount exceeds $5,000.

System has notified SOPP administrator and they will get approval from FinOps/Sponsored Funds.

Once the funding is approved the system will send you an email informing you of the final approval.

Back to main menu

**Procurement Agent approval required**

The total amount of your project exceeds $25,000. This project will need to be review by a Procurement Agent for approval.

The system has notified the SOPP administrator and they will get approval from the appropriate Procurement personnel.

Once the project is reviewed and has been approved the system will send you an email informing you of the final approval.

Back to main menu

The system is waiting either for Financial Operations to approve the funding for the Sponsored Fund in your shortcode list or UM Procurement Services to approve the quote since the amount exceeds $25,000. You will
Cancel/Void Projects

Cancel Project

Please enter your quote number here

You can only cancel projects before requisitions/purchase orders are created.

To cancel a project, enter your quote number and click the “Cancel Project” button and a notice will be sent to the selected suppliers.

Back to main menu
Extend Deadline

**Extend Deadline For Project**

Please enter your quote number here: 30110

You can only extend deadline for open projects.

- **View Current Deadline**

**Back to main menu**

To extend a project deadline, enter your quote number and click the “View Current Deadline” button.

**Change Quote Deadline for quote: 30110**

Deadline: 03/19/2014 (please overwrite this deadline with your new date)

Are you sure you want to change the deadline for the quote above? You may click the Quote ID to view job specification first.

- **Update Quote Deadline**

**Back to main menu**

Enter a new “Quote Due Date” and click the “Submit” button.
## Approve/Dispute Supplier Change Orders

If a supplier has additional charges for your project, you will see a “Change Order” in this location.

<table>
<thead>
<tr>
<th>OrigQuote# / ChangeOrder#</th>
<th>Job Title</th>
<th>Status</th>
<th>Supplier</th>
<th>Amount for the Change Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>30109/30129</td>
<td>Testing - 2</td>
<td>Dispute</td>
<td>Print-Tech</td>
<td>Total Amt $500.00, Postage $0.00</td>
</tr>
</tbody>
</table>

To see what the additional charges are, click the “Quote” link to view the suppliers document.

To approve these charges, click the “Approve” link.

To dispute these charges, click the “Dispute” link.
On this approval screen you will need to click the “Approve” button.

You are about to approve the following charge for change order 30109. Please double check to make sure that the billing amount is correct.

- **Original Quote:** 30109
- **Job Title:** Testing - 2
- **Printer's Name:** Print-Tech
- **Charge Amount:** $500.00
- **Attached Supplier Billing Document:** (Quote)
- **Description:** 9 x 13 yellow envelopes

If you agree with the amount of the charge on the change order, click Approve to finish the process.

The billing charge has been approved. The supplier has been notified for your decision.
Change Order - Disputed

If you do not agree with the charges the supplier has entered then you must enter a reason for the dispute in the dialog box and click the “Dispute” button. The supplier will be notified of your concerns about the proposed charges. They will have an opportunity to make changes and resubmit for approval.

You are about to dispute the following charge for quote 100691.

Quote: 100691
Supplier's Name: Allegra Print and Imaging
Charge Amount: $35.00
Attached Supplier Billing Document: (Quote)
Job Description: We only ordered one set of Proofs

(Please provide information to the supplier why Change Order is disputed)

Dispute

After you click the Dispute button the program will notify the supplier.

Back to previous page

Back to main menu

This is the message received after disputing the Change Order.

You are disputing the billable amount. The printer has been notified for your decision.

Back to main menu
Set View Only Permissions for all of your Quotes

View Only Permissions:

Enter unique names of people you would like to allow to view your projects

- dmaguire
- furndoc
- nglennie

Submit

Remove

To let someone see what projects you have, you can give them “View Only Permission” by entering their uniqname and selecting the “Submit” button. You can select more than one person.

To remove someone from your listing, check the box across from their uniqname in the “Remove” column and then click “Submit”.

Back to Main Menu
# View Quotes you have View Only Permissions

With “View Only Permissions” you can view the quotes, but will not be able to make any supplier selections.

You can view the messages posted by both the suppliers and the requestor.

## View Bids & Select Supplier (CARACARA) This is View Only Page

<table>
<thead>
<tr>
<th>Quote Number</th>
<th>DeptID</th>
<th>Created By</th>
<th>Status</th>
<th>Job Title</th>
<th>Quote Due Date</th>
<th>Supplier Response</th>
<th>Message Board</th>
</tr>
</thead>
<tbody>
<tr>
<td>30117(Printing)</td>
<td>940860</td>
<td>dmuire</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>unique name</td>
<td>03/19/2014 5pm</td>
<td>1 ([View Bids])</td>
<td>0</td>
</tr>
<tr>
<td>30121(Printing)</td>
<td>940860</td>
<td>dmuire</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>QTY</td>
<td>03/19/2014 5pm</td>
<td>1 ([View Bids])</td>
<td>1 (New!)</td>
</tr>
<tr>
<td>30113(Printing)</td>
<td>940860</td>
<td>dmuire</td>
<td>Waiting for FinOp/UM Procurement Approval</td>
<td>Testing</td>
<td>03/19/2014 5pm</td>
<td>1 ([View Bids])</td>
<td>0</td>
</tr>
<tr>
<td>30110(Printing)</td>
<td>940860</td>
<td>furmoc</td>
<td>Bid Closed</td>
<td>Test DG 1</td>
<td>03/19/2014 5pm</td>
<td>1 ([View Bids])</td>
<td>0</td>
</tr>
<tr>
<td>30135</td>
<td>940860</td>
<td>robincc</td>
<td>Saved/Unsubmitted</td>
<td>Test Order #9</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can view the bid(s) that have been returned by suppliers by clicking the “View Bids” link under the “Supplier Response” column.
To see the history of a quote, enter the quote number and then click the “Load Quote” button.

When clicking on the quote number you will see a PDF copy containing all the information entered for that particular quote.

When selecting the “View Detail” button you will see your pricing by components for your quote.

When hovering over the supplier name you will see their evaluation rating.
View Completed Projects/ Evaluate Supplier Performance

This link will show you a list of all your past projects by selected date range.

We encourage you to rate the supplier’s performance by selecting the quote you would like to evaluate and clicking the “Evaluate” button.
Supplier Evaluation Form / Supplier Performance Report

Quote: 30131

Supplier Name: Print-Tech

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Score (0-5; with 0 being the worst and 5 the best)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Quality</td>
<td>5</td>
</tr>
<tr>
<td>Customer Service</td>
<td>5</td>
</tr>
<tr>
<td>Prompt Delivery</td>
<td>5</td>
</tr>
<tr>
<td>Price</td>
<td>5</td>
</tr>
<tr>
<td>Value Added Service</td>
<td>5</td>
</tr>
<tr>
<td>Total</td>
<td>25</td>
</tr>
</tbody>
</table>

Additional Comments:

To evaluate the supplier’s performance rate them and add comments, if applicable.

To see all supplier’s performance ratings you can select the “View Supplier Performance” link on the main menu.
From the “Main Menu” enter a quote number in field and click the “View/Enter Message Now” button.

Review previously posted messages and who posted them.

Enter message subject here

Enter body of message here

Message Board

Message Board (Quote= 30113 ) View/Enter Message Now

Messages for Quote 30113: Testing

Subject: Response means retort, acknowledge
Content: Related to responsibility, loyalty
Date/Time Posted: 07/07/2014 09:25
Posted By: robincc

Add your message/reply here
Subject

Message Content

Post Message

Back to main menu

Back to main menu
Settings and Information

- Contact Us/Support Services- link to information on the Procurement staff responsible for maintaining the SOPP website.

- How the Program Works – link to a flow chart of the system.

- SOPP Tutorial – link to this tutorial.

- FAQ (Frequently Asked Questions) – link to common questions with responses.

- Log out of the SOPP website.
Support Services and Contact Information

General assistance, consultation and training:
Please contact:

Robin Eckel  
Contract Administrator  
734-763-9887  
robincc@umich.edu

Norma Glennie  
Contract Administrator  
734-647-6450  
glennie@umich.edu

Contract Administration and problem resolution:
For general questions regarding the online quoting system, your financial statement, specific billing disputes that cannot be resolved online with your provider, contact:

Robin Eckel  
Contract Administrator  
734-763-9887  
robincc@umich.edu

Technical Assistance
For technical problems, system issues or suggestions contact:

Jim Wu  
Applications Systems Analysis and Programming Manager  
734-647-0506

Or  
Andy Aiello  
Program Manager  
734-615-2678  
aaiello@umich.edu

Procurement Assistance
If you have special printing needs please contact the Print and Professional Services Procurement Team:

procurement@umich.edu  
Or  
Holly Kubiak  
Procurement Agent  
734-936-8294  
hollykub@umich.edu