Create an ePro Purchasing Request in M-Pathways

Overview

The M-Pathways Purchasing Request Form enables staff responsible for procuring items to request the purchase of goods or services. Staff can request multiple items for a single vendor. The electronic form is then routed to staff who work centrally within a unit to verify the information and place the order in M-Pathways.

Request creators need to have:

- The PR FORM PURCH USER role, which can be requested via OARS.
- An MToken. See *Obtaining and Activating your MToken* for details.

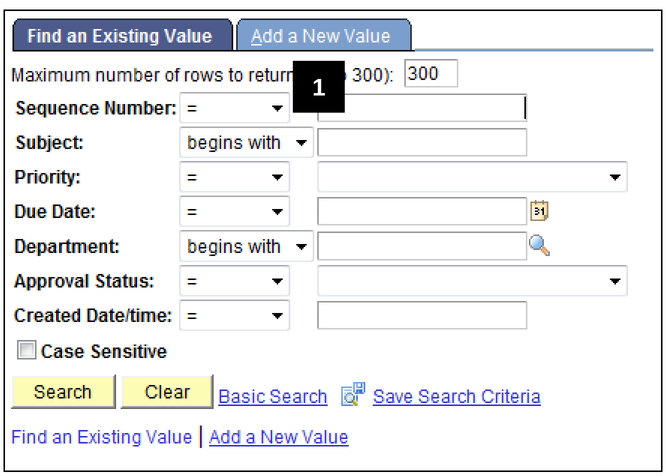
Note: Members of units in LSA do not complete casual receiving tasks in M-Pathways so they do not need an MToken to create an ePro Request.

This document includes generic instructions for creating the ePro Purchasing Request. Check your unit's business practice documentation for more details on how your unit uses this form.

Navigation

M-Pathways > eProcurement > Purchasing Request Form
Note: *Members of units in LSA can access the ePro Purchasing Request Form via the LSA web site.*

Create a Request



1. Click **Add a New Value**.

Purchasing Request Form Page

2. Type a description of the request in **Subject**.

   Note: The information in this field is searchable so include text that can be used to locate the request via search.

3. Optional: If your unit uses **Priority** and the request is not Standard, change the selection in the **Priority** dropdown list.

4. Optional: Enter a date by which you need the item(s) in **Due Date**. Type the date in 00/00/00 format or click the calendar icon to select one.

5. Optional: If your unit uses the **Dept ID** field for internal routing, type a full or partial value.

6. Under **Select Approver(s)**, type the name of the group responsible for approving this request or click Search to get a list of potential groups.

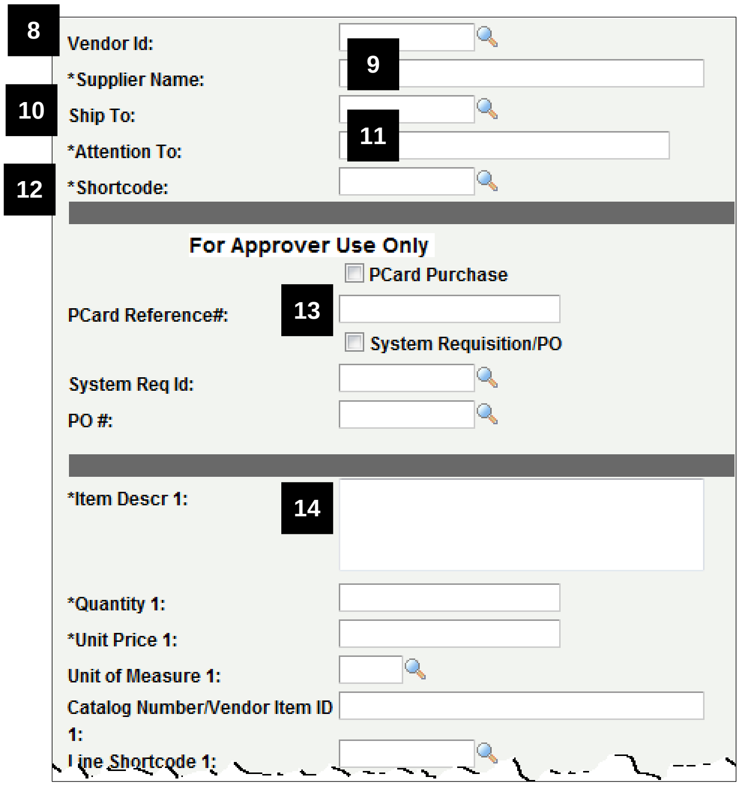
Notes:

- Check your unit's business practice information for recommendations on the appropriate group to select.
- This is the group that your request will be routed to upon submission.

7. Click any of the checkboxes used by your unit to track workflow. See your unit's business practice information for details.

Note: At any point after the request has been saved, click **View Printable Version** to print the current version of the form,

Purchasing Request Form Page (continued)



8. Optional: If you know the **vendor ID**, type it here or click Search to get a list of options.
9. Required: Type the name of the supplier you want to use in **Supplier Name**. This field is required, even if you entered a Vendor ID.
10. Optional: Type the **Ship To** code or click Search to get a list of options.
11. Required: Type the appropriate information in **Attention To,** according to your unit's business practice.
12. Required: Type the shortcode the order is billed to in **Shortcode** or click Search to get a list of options.

Note: To bill individual items to specific shortcodes, include the shortcode information in the item information. To split an item across multiple shortcodes, enter information in **More Information**.

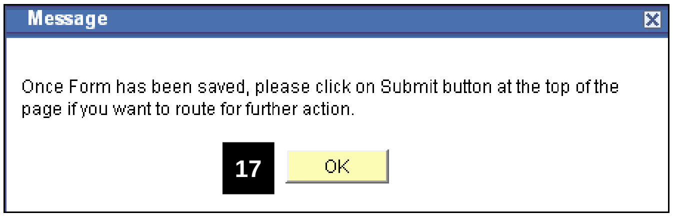
13. Skip the checkboxes and fields in the **For Approver Use Only** area.
14. Required: Complete at least one set of item information, including at least
    - an **Item Description**
    - a **quantity** and
    - a **unit price**.

Purchasing Request Form Page (continued)

15. Optional: Add additional comments or information in **More Information**.
16. Click **Save**.

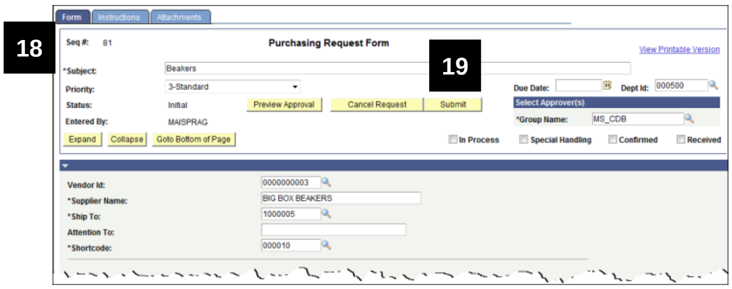
Note: If the information entered contains errors, the appropriate fields are highlighted in red. Correct the information and then click Save again.

Message Window



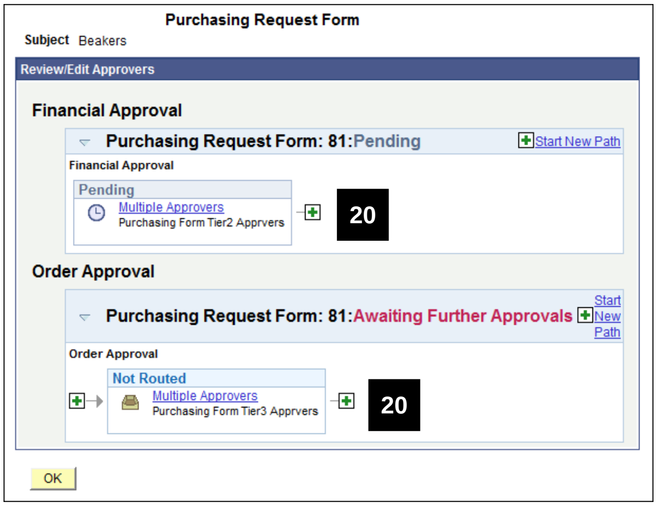
17. Clicking Save does not submit the form. Click **OK**.

Purchasing Form Request Page



18. The request now has a **Sequence number**. Use this number to check on the request as it progresses through the required approvers.
19. Click **Submit**.

Review/Edit Approvers Page



If you want to add an Approver or Reviewer,

20. Click the green **plus sign**.

Notes:

- If the Approver Group you selected on the request form has opted to use a Financial Approver, you will see both Financial Approval and Order Approval flow diagrams. If not, you will only see an Order Approval flow diagram.
- Added approvers must have the role that maps to the group to which the request is routed. Additionally, they must have the role PR PURCH FORM APPROVER.

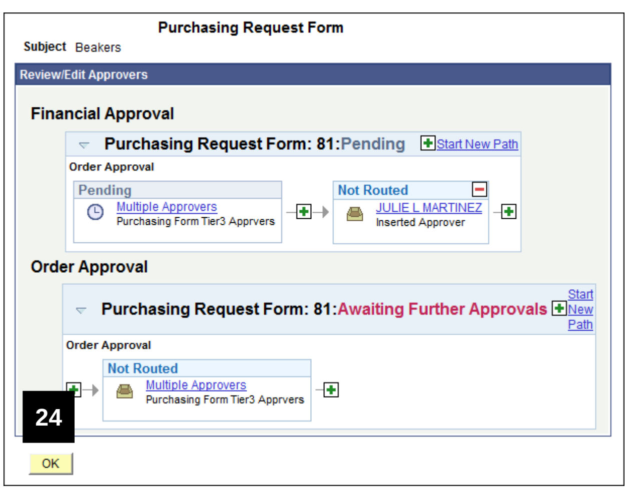
Start a new approval path Window

21. Type the uniqname of the person you want to add as an approver or reviewer in **User ID** or click Search to get a list.
22. To designate this person as a reviewer, click **Reviewer**.

Note: Reviewers receive an email that includes a link to the form so they can view it. They cannot approve or take any action on the form.

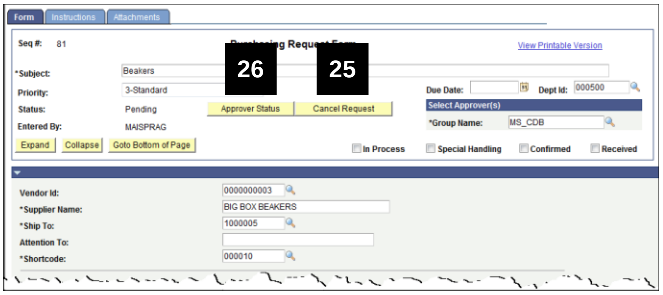
23. Click **Insert**.

Review/Edit Approvers Page



24. When the diagram flow(s) include all necessary approvers and reviewers, click **OK**. The status of the request moves from Initial to Pending and you can no longer make changes to the form.

Purchasing Request Form



25. Optional: To cancel the request or to make changes after it has been submitted, click **Cancel Request.** The form moves to Cancelled status. You can then make changes and click Submit again.

Notes:

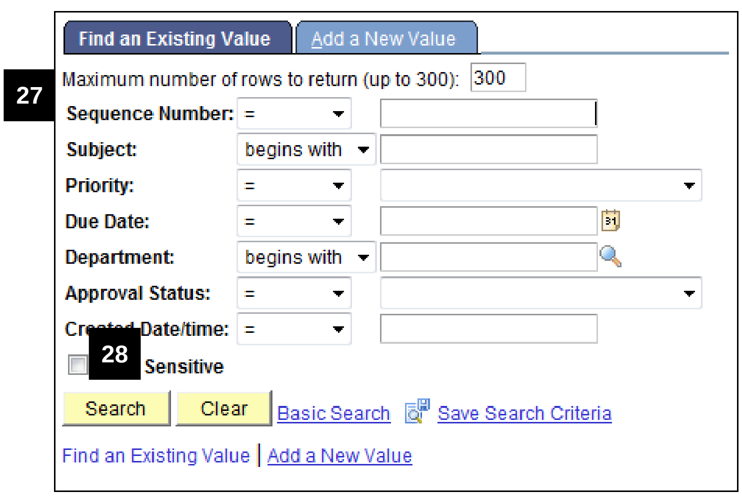
- Requests that remain Cancelled appear in search results with a status of Cancelled.
- Requests that move to Approved status cannot be cancelled. Follow your unit's business practice to cancel the order.

26. Optional: To check on the status of this request as it progresses through routing, click **Approver Status**.

Note: The form creator receives an email when the request has been approved or denied. If the request is denied, a comment is required. The form creator can make any necessary changes and resubmit it. This button is available until the final required approver.

Find an Existing Request

Search/Fill a Form Page

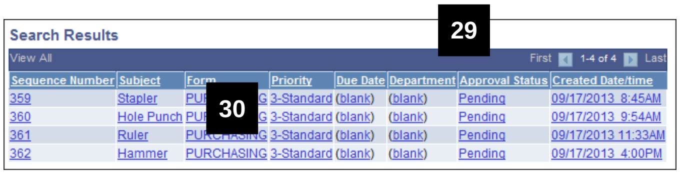


27. To search by the Sequence Number of the request, type it in **Sequence Number** OR

    Enter other information in the appropriate field. For example, type a full or partial subject in **Subject**.

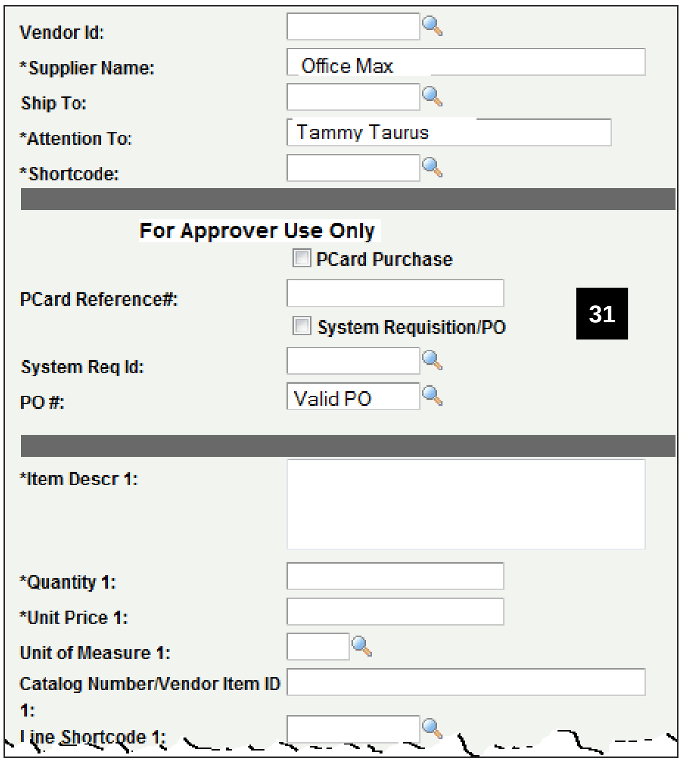
28. Click **Search**.

Search Results



29. Optional: Click on the column header links to sort the list by the related value.
30. Click any value in a row to go to the corresponding request.

Purchase Request Form



31. Check the information in the **For Approver Use Only** area.

Additional eProcurement Resources

- The *ePro Requisition Resources Web Page*