

# TIER 1

## Surgery Procurement Procedures

### Tier 2 Representatives (By Section):

Admin Surgery

General Surgery

Pediatric Surgery

Plastic Surgery

Thoracic Surgery

Transplant Surgery

Vascular Surgery

Find an Existing Value | Add a New Value

Maximum number of rows to return (up to 300): 300

Sequence Number: = [dropdown] [input]

Subject: begins with [dropdown] [input]

Priority: = [dropdown] [dropdown]

Due Date: = [dropdown] [input] [calendar icon]

Department: begins with [dropdown] [input] [magnifying glass icon]

Approval Status: = [dropdown] [dropdown]

Created Date/time: = [dropdown] [input]

Case Sensitive

Search Clear Basic Search Save Search Criteria

Find an Existing Value | Add a New Value

### Wolverine Access Path:

Faculty & Staff > M-Pathways Financials & Physical Resources System

Log in to system using Level 1 Password & M-token  
Main Menu > eProcurement > Purchasing Request Form

1. **Purchasing Request Form\*** One Request Form per vendor and one vendor per M-Marketsite cart \*

a. **Add a New Value**

b. **Subject line:**

- REQUIRED: Section Name – PI Last Name
- OTHER HELPFUL INFO:  
Quote/Requestor Name/P-Card Purchase (P-Cards will be used on an exception basis only – provide explanation for request)
- in More Information Box at bottom of form)

c. **Priority:** If you need within 24 hours, include a note in the “More Information Box” at the bottom of the form and call Tier 2.

d. **Due Date:** Date when item needs to be delivered to lab

e. **Dept ID:** N/A

f. **Group Name:**

Form Instructions Attachments

Purchasing Request Form View Printable Version

\*Subject: [input]

Priority: 3-Standard [dropdown]

Status: Initial [dropdown]

Entered By: MAUSPRAG [input]

Due Date: [input] [calendar icon] Dept ID: [input] [magnifying glass icon]

Select Approver(s) [dropdown]

\*Group Name: [input] [magnifying glass icon]

Expand Collapse Go to Bottom of Page

Special Handling  Confirmed  Received

Vendor Id:	<input type="text"/>
*Supplier Name:	<input type="text"/>
Ship To:	<input type="text"/>
*Attention To:	<input type="text"/>
*Shortcode:	<input type="text"/>
<b>For Approver Use Only</b>	
	<input type="checkbox"/> PCard Purchase
PCard Reference#:	<input type="text"/>
	<input type="checkbox"/> System Requisition/PO
System Req Id:	<input type="text"/>
PO #:	<input type="text"/>
<b>For Approver Use Only</b>	
*Item Descr 1:	<input type="text"/>
*Quantity 1:	<input type="text"/>
*Unit Price 1:	<input type="text"/>
Unit of Measure 1:	<input type="text"/>
Catalog Number/Vendor Item ID 1:	<input type="text"/>
Line Shortcode 1:	<input type="text"/>

- g. **Vendor ID:** N/A
- h. **Supplier Name :** Vendor Company Name
- i. **Ship to:** N/A
- j. **Attention:** End User's Name/Room #/Building
- k. **Shortcode:** Provide appropriate short code
- l. **For Approver Use Only:** Skip
- m. **Item Description:** Name of product being ordered
  - i. Copy information directly from vendor website (recommended)
- n. **Quantity:** Number of items being requested (Use "1" for cart orders)
- o. **Unit Price:**
  - i. Actual price for ONE item; do not include shipping
  - ii. Use discounted price for ONE item, where discounts apply (include Quote # in More Information Box at bottom of form, attach copy of Quote, if needed)
- p. **Catalog Number/Vendor ID:** REQUIRED! Purchase Request Forms without catalog numbers will be returned. Catalog numbers are required by vendors and Tier 2 representatives lack scientific knowledge of products to attempt to find catalog numbers on vendor websites.
- q. **Shortcode:** N/A (include shortcode in upper portion of form)
- r. Repeat description, quantity, unit price, catalog # for additional items from the same vendor

More Information:

Save Goto Top of Page

Notify

Form | [Instructions](#) | [Attachments](#)

**Message** [X]

Once Form has been saved, please click on Submit button at the top of the page if you want to route for further action.

OK

- a. **More Information Box:** : Add comments, special instructions, quote information, P-Card justification explanation and link to vendor website, Material Transfer Agreement (MTA)/Unfunded Agreements (UFA) information. MTAs or UFAs must be completed prior to orders being placed. Contact your Surgery Pre-Award representative for assistance with documents (list attached).
- b. Click "Save"
- c. Request now assigned a sequence number (upper left corner of form)
- d. **Attachments:** If there is an attachment needed (quote, primer sequences), attach via the "Attachments" tab at the top of the form. All primer sequences must be in Excel format.
- e. Click "Submit"

Form | [Instructions](#) | [Attachments](#)

Seq #: 81 **Purchasing Request Form** [View Printable Version](#)

\*Subject: Beakers

Priority: 3-Standard

Status: Initial [Preview Approval](#) [Cancel Request](#) [Submit](#)

Entered By: M4SPRAG

Due Date: Dept #: 000500

Select Approver(s)

\*Group Name: MS\_CDB

[Expand](#) [Collapse](#) [Goto Bottom of Page](#)  In Process  Special Handling  Confirmed  Received

Vendor ID: 000000003

\*Supplier Name: BIG BOX BEAKERS

\*Ship To: 1000005

Attention To:

\*Shortcode: 000010

- TIPS:** - Use Tab key to move between fields on form
- a. If request is denied, form will be returned to Tier 1 with an explanation. Form can be edited and resubmitted.
  - b. Purchase Request Forms can be canceled by clicking "Cancel Request" while form is in Pending Status
  - c. Search for Purchasing Request Forms by using the Sequence Number on the "Find an Existing Value" tab or via the link in emails generated by the ordering system.

## 2. Assigning a cart to Tier 2 user in M-Marketsite

3. Main Menu > eProcurement > Create Requisition > Add Items and Services > Web > M-Marketsite
  - a. Select vendor and choose items to order using the M-Marketsite punchout system
  - b. Submit the cart, review it and proceed to checkout
  - c. The next page allows you to review/change the shortcode and shipping address.
  - d. Select "Assign a Cart" and search for an assignee
    - i. Type in Tier 2 user's name or unique name and Search.
    - ii. Select and assign the cart to Tier 2 user
  - e. To reassign a cart to another Tier 2 user:
    - i. In M-Marketsite hover cursor over the picture of a cart in left margin
    - ii. Hover over "My Carts and Orders"
    - iii. Click "View Draft Shopping Carts"
    - iv. Click "Unassign"
    - v. Click "Reassign" and add new Tier 2 username


[Find an Existing Value](#) [Add a New Value](#)


Maximum number of rows to return (up to 300):

Sequence Number: =

Subject: begins with

Priority: =


Due Date: =  

Department: begins with  

Approval Status: =

Created Date/time: =

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

[Find an Existing Value](#) | [Add a New Value](#)

## 3. Find an Existing Request

Main Menu > eProcurement > Main Menu  
> Purchasing Request Form

- c. Click "Find an Existing Value"
- d. 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**.
- e. Click "Search"
- f. Click any value in a row to go to the corresponding request.

Search Results							
View All							
First 1-4 of 4 Last							
Sequence Number	Subject	Form	Priority	Due Date	Department	Approval Status	Created Date/time
359	Stapler	PURCHASING 3-Standard	(blank)	(blank)	Pending	09/17/2013 8:45AM	
360	Hole Punch	PURCHASING 3-Standard	(blank)	(blank)	Pending	09/17/2013 9:54AM	
361	Ruler	PURCHASING 3-Standard	(blank)	(blank)	Pending	09/17/2013 11:33AM	
362	Hammer	PURCHASING 3-Standard	(blank)	(blank)	Pending	09/17/2013 4:00PM	

Vendor Id:

\*Supplier Name:

Ship To:

\*Attention To:

\*Shortcode:

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**For Approver Use Only**

PCard Purchase

PCard Reference#:

System Requisition/PO

System Req Id:

PO #:

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\*Item Descr 1:

\*Quantity 1:

\*Unit Price 1:

Unit of Measure 1:

Catalog Number/Vendor Item ID 1:

Line Shortcode 1:

- g. Check the information in the “For Approver Use Only” area.



**Manage Requisitions**

To locate requisitions, edit the criteria below and click the Search button.

Business Unit:  Requisition Name:

Requisition ID:  Request Status:  Budget Status:

Date From:  Date To:

Requester:  Entered By:  PO ID:

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**Requisitions**

To view the Reqs and line items for a requisition, click the Expand triangle icon.  
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Budget	Total	
1001841007	1001841007	UMCH	10/16/2013	PO(s) Dispatched	Valid	210.00 USD	*Select Action* <input type="button" value="Go"/>

[Review Change Request](#) | 
 [Review Change Tracking](#) | 
 [Manage Reqs](#) | 
 [Requisition Report](#) | 
 [Req PO Status Report](#)

**4. Look Up a Purchase Order Number**  
Main Menu > eProcurement > Manage Requisitions

- c. Delete the dates in the “Date From” and “Date To” fields
- d. Type the Purchase Requisition Number in the “Requisition ID” field
- e. Click on the Requisition Number
- f. Click on “PO Information” to locate the Purchase Order Number.



**Manage Requisitions**

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: UMICH Requisition Name:

Requisition ID:  Request Status: All but Complete Budget Status:

Date From: 10/15/2013 Date To: 10/22/2013

Requester:  Entered By:  PO ID:

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**Requisitions**

To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition Name	BU	Date	Status	Request	Total
1001841087	1001841087	UMICH	10/15/2013	PO(s) Dispatched	Valid	210.00 USD

**Receive Items**

You have 2 lines open for receiving for requisition 1001841087

and go to the Receive Form.

Requisition Lines to Receive

Req ID	Requisition	Item Description	Total Req Qty/Unit	Accepted to Date	UOM	Ship To	Attention To	Vendor
UMICH	1001841087	Item 1	3	0	EA	2054228	JULIE L MARTINEZ	ABC WAREHO-002
UMICH	1001841087	Item 2	2	0	EA	2054228	JULIE L MARTINEZ	ABC WAREHO-002

[Inquire Receipts](#) [Manage Return to Vendors](#)

**Receive Items**

New Receipt

Business Unit: UMICH

Receipt Status: Open

\*Received Date: 10/22/2013

Receipt Lines

Line	Item Id	Item Description	Received Quantity	UOM	Accept Quantity	Details	Receipt	PO
1		Item 1	3.0000	EA	3.0000			

[Add New Receipt](#) [Manage Return to Vendors](#) [Inquire Receipts](#)

**5. Receiving Goods- this is a required step and will be monitored.**

**Receive Goods by Purchase Requisition #:**

Main Menu> eProcurement> Manage

Requisitions

- a. Once goods arrive, mark items as received in Wolverine Access
  - i. If there is an issue with receiving goods, it is Tier 1's responsibility to notify the Tier 2 for follow up with vendor.
- b. Search for order based on:
  - i. Requisition Number: Listed on the Purchasing Request form. Search for the form or use links from approval emails in your inbox.
  - ii. Requester: Search by the unickname of the Tier 2 representative in the Requester Field. Dates can also be added in the Search area to filter results.
  - iii. Purchase Requisition titles will use the following naming convention: Tier 1 Unickname-Vendor-Order Date
- c. Select "Receive Order" from the drop down list next to the appropriate order Click "OK"
- d. Verify items and quantity received are correct
- e. Check boxes (or use check all) for items to be marked as received
- f. Click "Received Selected"
- g. If applicable, use the Receipt Comments field to make notes on receiving goods  
Click "Save Receipt"

Receiving

Find an Existing Value    Add a New Value

Business Unit: UMICH  
 Receipt Number: NEXT  
 PO Receipt

Add

Select Purchase Order

Search Criteria

PO Unit: UMICH    Days +/- Today:

ID:    Start Date:

Line / Schedule:    End Date:

Release:    Vendor Name:

Item ID:    Vendor Item ID:

Ship To:    Manufacturer ID:

Ship Via:    Manufacturer's I

Retrieve Open PO Schedules

Search    Receipt Qty Opt  
 No Order Qt

OK    Cancel    Refresh

Retrieved Rows

Selected Rows    Shipping Related    More Details    PDF

Sel	PO Unit	PO ID	Line	Sched	Release	Due Date	PO Qty
<input type="checkbox"/>	UMICH	3002757952	2	1		08/14/2014	2.0000
<input type="checkbox"/>	UMICH	3002757952	3	1		08/14/2014	2.0000

Select All     Clear All

OK    Cancel    Refresh

Maintain Receipts

Receiving

Business Unit: UMICH    Receipt Status: Open

Receipt ID: NEXT    Add Vendor Comments    Actions

Vendor:    Print Delivery Report    Receipts List

Select Purchase Order

Line	Item	Description	Receipt Qty	Unit Price	Receipt Price	Market	Status	Close	Unit	Service	IP
1		300-16 to 14C-20 Reinforce Bolt	2.0000	EA	1.87500	2.0000	Open				
2		PC-3010 Phone Trunk Port 2-Port	2.0000	EA	10.40000	2.0000	Open				

Interface Receipt    Verify Asset Information

Save    Print    Refresh

Receive Goods by Purchase Order #:

Main Menu>Purchasing>Receipts> Add/Update Receipts

- Click "Add"
- Type PO ID or select a value from the Lookup in the ID field
- Click Search

Note:

- Do not press Enter button on keyboard to search
- Search results display the lines of the PO in the Retrieved Rows section

- Turn on the checkbox for the line(s) that is to be received
- Note: If applicable, click "Check All" to select all lines for receiving

- Click "OK"

- Verify or type the quantity received for each item in the Received Quantity column

Note:

- The default value in the Receipt Quantity column is the PO quantity and only needs to be changed if a different quantity is received

- If the PO is set up to receive by amount, type value in the Received Amount field (not shown). The received amount populates the balance of the PO

Click "Save"

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## **TOOLS & RESOURCES**

Post Award Procedures Manual:

<http://medicine.umich.edu/medschool/research/office-research/grant-review-analysis/post-award-information>

M-Pathways Instructions:

h. Create a Request form Step-by-Step

[https://maislinc.umich.edu/mais/pdf/GL\\_FR\\_ePro\\_CreateForm\\_SS\\_LSAMED\\_Draft.pdf](https://maislinc.umich.edu/mais/pdf/GL_FR_ePro_CreateForm_SS_LSAMED_Draft.pdf)

i. Casual Receiving Step-by-Step

[https://maislinc.umich.edu/mais/pdf/PR\\_EP\\_CasualReceiving\\_SS.pdf](https://maislinc.umich.edu/mais/pdf/PR_EP_CasualReceiving_SS.pdf)