

Welcome to the eProcurement quick guide a handy desktop reference to get users on the fast track to efficient eProcurement ordering.

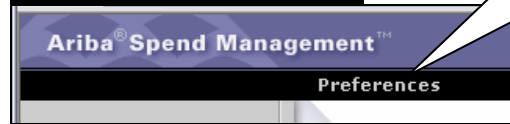
Begin by typing the address below in your browser's address bar and pressing **Enter**.

<http://www.washington.edu/admin/stores/eprocurement>

Click on the **Access eProcurement** image in the left margin (see below)



## CREATING A PROFILE



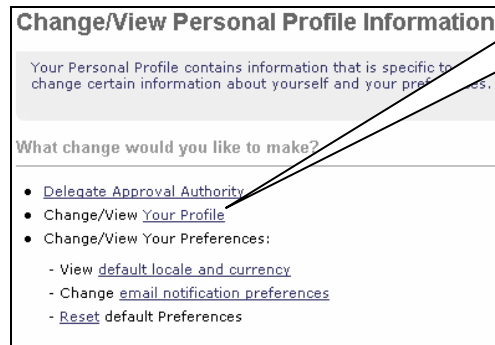
Select **Preferences**

Prior to any ordering activity Ariba requires the user to create a personal profile consisting of address and budget information. Begin by clicking **Preferences** on the Ariba home screen. Once **Preferences** is selected the user will be presented with a bulleted list of options.

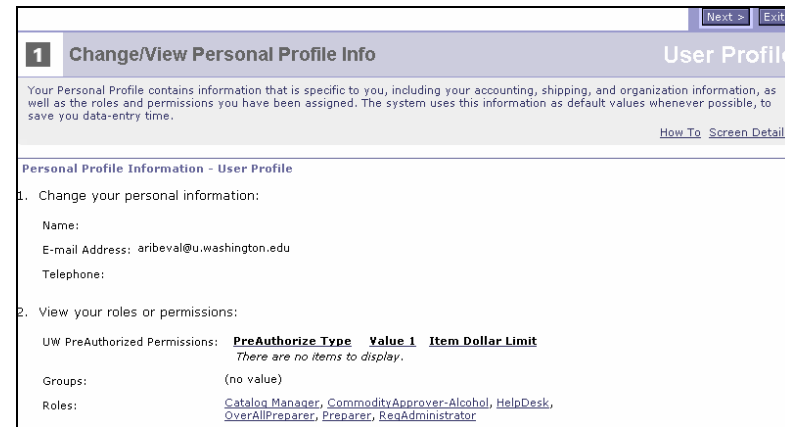
From these options select the second option:

Click **Change/View Your Profile**

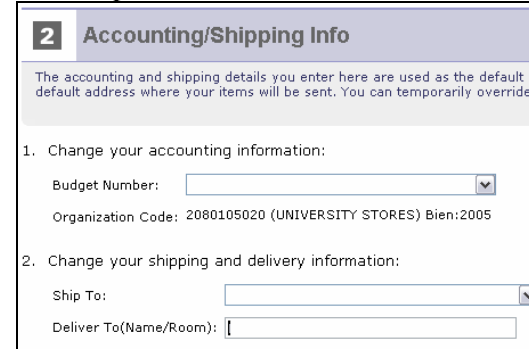
Click **Your Profile**



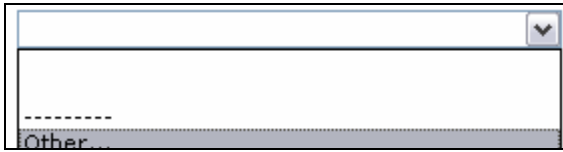
After **Your Profile** is selected screen one is displayed.



Review personal information and click **Next**.



The user will now enter their accounting and shipping information. Begin by selecting the down arrow and selecting a budget number. **Note:** first time users will need to select **Other**.



1. Click **Other**

The user is now presented a text box to enter a budget number and search button to retrieve the users budget number.

Field: Budget#

2. Enter budget number and click **Search**

Budget#	Name	Org Code	Status	Eff. Date	Biennium	Action
#####	#####	#####	1	20050901	2005	<input type="button" value="Select"/>

Budget number is now displayed to the user.

3. Click **Select**.

The budget number is now stored as the users default budget number. The user should now proceed to section two where the shipping address will be added to the profile.

2. Change your shipping and delivery information:

Ship To:

Deliver To(Name/Room):

4. Click **Other**

Field: Name

Name	Street	City	State	Country
There are no items to display.				

4. Enter building name and click **Search**.

Field: Name

Name	Street	City	State	Country	Action
#####	4000 15TH AVE NE	SEATTLE	WA	United States	<input type="button" value="Select"/>

5. Address is now displayed click **Select**.

## 2 Accounting/Shipping Info User Pr

The accounting and shipping details you enter here are used as the default budget to be charged for items you order, and the default address where your items will be sent. You can temporarily override these settings during a session, when necessary. [How To](#) [Screen](#)

1. Change your accounting information:

Budget Number:

Organization Code:

2. Change your shipping and delivery information:

Ship To:

Deliver To(Name/Room):

The address is now stored in the profile. Add the user name and room number as shown. **Note:** Please limit name and room to 30 characters.

4. Click **Next**.

## 3 Justify Changes

You may enter comments to justify your personal profile changes.

Screen three hosts optional information.

5. Click **Next**.



The user is discouraged from adding approvers.

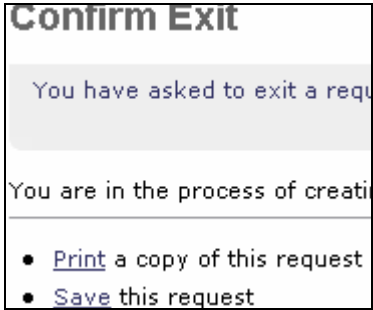
6. Click **Next**.



Change	From	To
Organization Code	#####	#####
Budget Number	#####	#####

The user may now review the changes to verify that the correct information has been stored.

7. Click **Submit**.



8. Click **Save**.

The user profile is now established.

## CREATING A REQUISITION

The screenshot shows the Ariba Spend Management interface. A callout box with the text "Click Requisition" points to the "Create Requisition" link in the left-hand navigation menu. The main content area displays the University of Washington logo and a "UW News and User Links" section with links for "Ariba at UW" and "Browser Recommendations".

To begin the ordering process:

### 1. Click **Requisition**.

The screenshot shows the "1 Add Title" step. It includes instructions: "Enter a title for your requisition. You (the 'preparer') may create the requisition. Approvals are based on the preparer's budget; shipping is based on the 'Template' requisition only (i.e. template reqs can be copied, but not submitted on to add items.)". Below the instructions are three fields: "Title:" with the text "Untitled Requisition", "On Behalf Of:" with a dropdown menu, and "Template:" with an unchecked checkbox.

2. Add a title.
3. Click **Next**

## ADDING ITEMS

The Add Items screen is host to both search fields as well as links to products including vendor catalogs which access Corporate Express and VWR catalogs. The user has the option of clicking a link or using one of the text boxes. In the event the user is unsure of the category the product may be associated with, a keywords field is used to perform a product search. If the user knows the part number a search for a specific item can be made as well using the supplier number field.

The screenshot shows the "2 Add Items" step. It includes instructions: "Add items to your requisition. You can add items from the catalog, from vendor catalogs, from your favorites list, or enter details for non-catalog items. When you finish adding items, click **Next** to go to the next step in the process or **Summary** to review and submit your request." Below the instructions are search fields: "Keywords (And):", "Keywords (Or):", "Exact Phrase:", "Supplier Part #:", "Mfg. Part #:", "Favorites:", "Supplier:", "Manufacturer:", and "Type Name:". There are also buttons for "Search", "Reset", "Options", and "Create Non-Catalog Item". Below the search fields, it shows "16,291 items found" and a list of categories with item counts, such as "Vendor Catalogs (9)", "Paper Products (181)", "Janitorial Supplies (203)", "Office Equipment and Supplies (1097)", "Lab and Glassware (1542)", and "Medical Equipment and Supplies (214)".

For Example:

### 1. Click **Paper Products**

The screenshot shows the "Paper Products" category. It lists various paper products with their counts: "Computer Paper (14)", "Printer/Copier Paper (28)", "Fax Paper (2)", "Cards (16)", "Index Card (12)", "Card Stock (2)", "Note Card (2)", "Pads (63)", "Easel Pad (2)", "Message Pad (10)", "Paper Pad/Notebook (26)", "Miscellaneous Paper (58)", "Calculator Paper (4)", "Coated Papers (1)", and "Graph Paper (3)".

### 2. Click **Pads**

**PAPER EASEL POST-IT PLAIN 2**  \$43.40USD / pack [Add to Cart](#)

Supplier: [University Stores](#)  
 Supplier Part #: 1068500  
 ETA (Days): 0

PAPER EASEL, POST-IT, PLAIN, 25 X 30 1/2", CAN BEUSED BY ITSELF OR ON STAND, MARKER WON'T BLEEDTHROUGH,WHITE, 30 SHEETS/PAD, 2 PDS/PK,2 PKS/CS\*\*3M\*\*559\*\*BOISE\*\*P3559\*\*

[Add to Favorites](#)

---

**PAPER EASEL PAD 27" X 34" PLA1**  \$27.29USD / pack [Add to Cart](#)

Supplier: [University Stores](#)  
 Supplier Part #: 1068495  
 ETA (Days): 0

PAPER EASEL,PAD, 27" X 34", PLAIN, WHITE,50 SH/PD,2 PD/PK, 3-HOLE DRILLED ACROSS TOP, RECYCLED\*\*CASCAD/HT\*\*A151\*\*BOISE\*\*P3A151\*\*

[Add to Favorites](#)

---

**10 items found in: Paper Products > Pads > Message Pad [More items...](#)**

**BOOK,WYWO,2PT,NCR,4UP,2C**  \$4.79USD / each [Add to Cart](#)

Supplier: [Corporate Express](#)  
 Supplier Part #: TOP4005  
 ETA (Days): 0

BOOK,WYWO,2PT,NCR,4UP,2C; 1033103 \*\*MFG - TOPS \*\* - [Add to Favorites](#)  
 \*\*\*ITEM WILL SHIP DIRECTLY FROM VENDOR\*\*\*

---

**PAD POST-IT DESKTOP MESSENGER**  \$3.03USD / pack [Add to Cart](#)

Supplier: [University Stores](#)  
 Supplier Part #: 1033063  
 ETA (Days): 0

PAD POST-IT,DESKTOP MESSENGER, 3X5", IMPRINTEDWITH RETURN, LOCATION, CONTACT, 50 SH/PD, 4 PD/PKNOT PICTURED\*\*3M\*\*4221-4\*\*BOISE\*\*SA2 4221-4\*\*

[Add to Favorites](#)

---

**FORM THINGS TO DO TODAY PAD**  \$1.19USD / pad [Add to Cart](#)

Supplier: [University Stores](#)  
 Supplier Part #: 1033069  
 ETA (Days): 0

FORM, THINGS TO DO TODAY, PAD, UW FORM #1139,SIMILAR TO TOPS PAD, 5 X 8, 50 SH/PDREV 2-93, 160 PD/CS; NOT PICTURED IN 99 CE CATALOG\*\*\*\*\*PUBL.SERV\*\*\*\*\*

[Add to Favorites](#)

The selected inventory is now displayed and the user can view product descriptions and add items to the shopping cart.

### 3. Click Add to Cart

The checkbox

Items: 2 Total: \$44.59USD [Back to Catalog](#) [Next >](#)

**Shopping Cart** Requisition

These are the items you have added to your requisition. You can edit, copy, or delete selected line items, and add new line items. If you change any values, update the total.

To hide this screen in the future, click the  box; to show the screen again, reset the default preference. [How To](#) [Screen Detail](#)

No.	Type	SR	Description	Qty	Unit	Price	Amount
1	<input type="checkbox"/>		FORM THINGS TO DO TODAY PAD	1	pad	\$1.19USD	\$1.19USD
Supplier: <a href="#">University Stores</a> Contact: <a href="#">University Stores</a> Commodity Code: <a href="#">Telephone message pads or books</a> Supplier Part Number: 1033069 Store/Branch #: UC							
FORM, THINGS TO DO TODAY, PAD, UW FORM #1139,SIMILAR TO TOPS PAD, 5 X 8, 50 SH/PDREV 2-93, 160 PD/CS; NOT PICTURED IN 99 CE CATALOG*****PUBL.SERV*****							
2	<input type="checkbox"/>		PAPER EASEL POST-IT PLAIN 2	1	pack	\$43.40USD	\$43.40USD
Supplier: <a href="#">University Stores</a> Contact: <a href="#">University Stores</a> Commodity Code: <a href="#">Easel pad</a> Supplier Part Number: 1068500 Store/Branch #: UC							
PAPER EASEL, POST-IT, PLAIN, 25 X 30 1/2", CAN BEUSED BY ITSELF OR ON STAND, MARKER WON'T BLEEDTHROUGH,WHITE, 30 SHEETS/PAD, 2 PDS/PK,2 PKS/CS**3M**559**BOISE**P3559**							

Total Cost: \$44.59USD

[Edit](#) [Copy](#) [Delete](#) [Update Total](#)

The shopping cart allows a user to review the order to determine if any editing or deleting of items is called for prior to submitting the order.

### 4. Select checkbox for line item 1.

### 5. Click Edit.

**2 Edit Line Item** Requisition

This is a summary of the item you selected. Change any editable field and save your changes. [How To](#) [Screen Detail](#)

**Line Item Details**

No.: 3

Supplier: [University Stores](#)

Supplier Auxiliary Part ID: UC

Description: PAPER EASEL, POST-IT, PLAIN, 25 X 30 1/2", CAN BEUSED BY ITSELF OR ON STAND, MARKER WON'T BLEEDTHROUGH,WHITE, 30 SHEETS/PAD, 2 PDS/PK,2 PKS/CS\*\*3M\*\*559\*\*BOISE\*\*P3559\*\*

Quantity: 1

Unit of Measure: pack

Price: \$43.40USD

Commodity Code: [Easel pad](#)

Account Code: [056400 \(OFFICE SUPPLY/PAPER\) Rien:2005](#)

Object SubObject: 0564

Sub SubObject: 00

Task:

Option:

Project:

---

Budget Number:

Organization Code:

[Split Accounting](#)

**Shipping - by Line Item**

Ship To:

Deliver To(Name/Room):

Need-by Date:

\*\*\* UW Stores items only \*\*\*

Delivery Requirements:  Normal (Within 3 business days)  
 Rush (Next business day)  
 Counter Pickup

Delivery Instructions:

The Edit Line Item screen displays fields most commonly used for editing shipping and budget information. This screen has the same functionality as was found when setting up budget and shipping information in the personal profile. Also, this screen enables users to create orders where each item may have a unique address and recipient by entering the shipping and budget information on a line by line basis.

percentage.

6. Click on the **Budget Number:** down arrow

A screenshot of a web form. At the top, there is a field labeled "Budget Number:" with a dropdown arrow. Below it is an "Organization Code:" field. A callout box with the text "Click Other" points to the "Other,..." option in the dropdown menu. A "Split Accounting" button is located below the "Organization Code:" field.

7. Click **Other**

A screenshot of a search interface. At the top, there is a "Field:" label, a dropdown menu set to "Budget#", a text input field containing "#####", and a "Search" button. A callout box with the text "Click Search" points to the "Search" button. Below this is a table with columns: Budget#, Name, Orq Code, Status, Eff. Date, Biennium, and Action. The table contains one row with "(no value)" in the Budget# column and a "Select" button in the Action column.

8. Enter **Budget Number**

9. Click **Search**

Budget#	Name	Orq Code	Status	Eff. Date	Biennium	Action
#####	#####	#####	1	20050901	2005	Select

Budget number is now displayed to the user.

3. Click **Select**.

To apply multiple budgets toward one item select **Split Accounting**.

A screenshot of a form. At the top, there is a "Budget Number:" field with a dropdown arrow and an "Organization Code:" field. A callout box with the text "To apply multiple budgets toward one item select Split Accounting." points to the "Split Accounting" button. Below the "Organization Code:" field is a table for "Accounting Information" with columns: No., Budget Number, Organization Code, Split Amount, and Action. The table has two rows. Row 1 shows "100%" in the Split Amount column. Row 2 shows "0%" in the Split Amount column. A note below the table says "Value must not be zero." At the bottom right, there is a summary box: "Unallocated: 0%", "Total: 100%".

The user may add budget numbers and add split amounts based on

A screenshot of a "Shopping Cart" page. The title is "Shopping Cart" and "Requisition". Below the title, there is a description: "These are the items you have added to your requisition. You can edit, copy, or delete selected line items, and add new line items. If you change any values, update the total." Below this is a table with columns: No., Type, SR, Description, Qty, Unit, Price, Amount. The table contains one row with "1" in the No. column, "pad" in the Unit column, and "\$1.19USD" in the Price column. Below the table, there is a "Total Cost: \$1.19USD" label. At the bottom, there are buttons for "Edit", "Copy", "Delete", "Update Total", "Back to Catalog", and "Next".

The user may return to the catalog (click **Add Items**) or advance to the next step(click **Next**).

10. Click **Next**

A screenshot of a "Checkout" page. The title is "Checkout" and "Requisition". Below the title, there is a description: "This is a summary of your current requisition. Review the information to be sure it is correct. You can go back to any previous step to change the information. When you are finished, click **Submit** to submit the request for approval. Orders submitted through this system are not encumbered and will not be reflected in the legacy system encumbrance totals (in PAS or FIN). If you want to split budgets, click on **Edit Items**." Below this is a "Summary" section with fields for "Title:" (jkkkin), "On Behalf Of:" (KEVIN J CAMPBELL), and "Template:". Below the summary is a "Line Items" section with a table with columns: No., Type, SR, Description, Qty, Unit, Price, Amount. The table contains one row with "1" in the No. column, "pad" in the Unit column, and "\$1.19USD" in the Price column. Below the table, there is a "Total Cost: \$1.19USD" label. At the bottom, there are buttons for "Edit", "Copy", "Delete", "Update Total".

11. Click **Submit**.

The requisition has now been successfully submitted.

