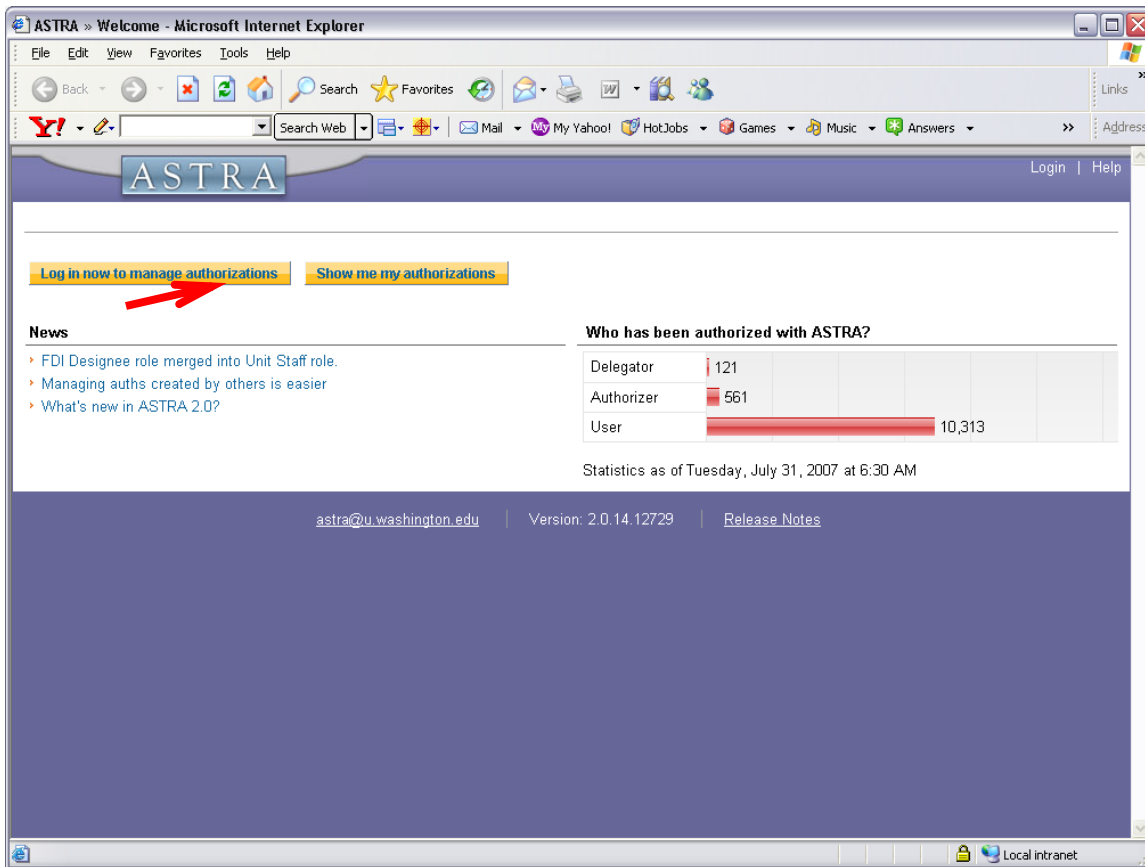


Instructions for Authorizers on Setting Up Users in ASTRA/eProcurement

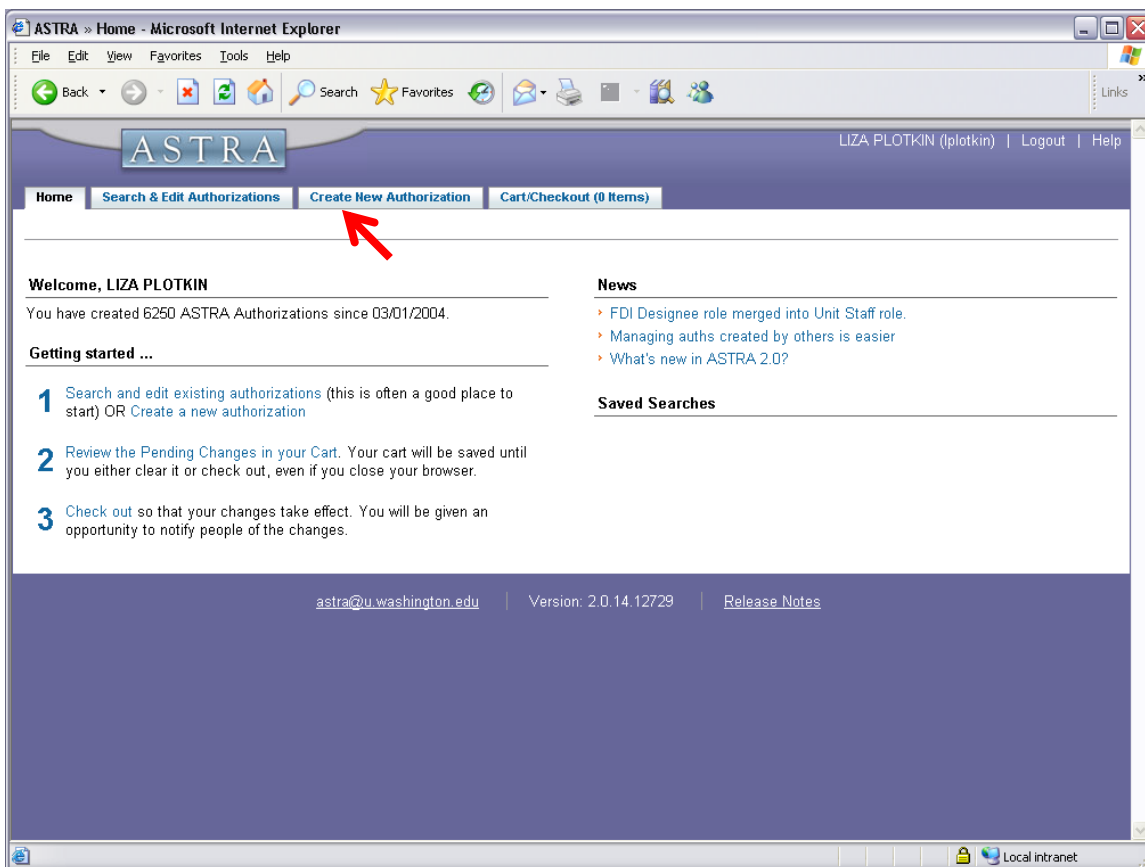
Step by step instructions on authorizing users for eProcurement access through ASTRA by giving them roles of Preapproved Preparer, Approver, Watcher.

Astra/eProcurement User roles are only for people who will need to Approve, Watch or who are pre-approved to make purchases. Users typically will have one role but can have two or all three of them.

Anyone with a UWNetID can logon and enter requisitions in eProcurement without an Astra role, those requisitions will route to the corresponding Approver in the department and will become a Purchase Order upon final approval.



Access ASTRA. Click on Log in now to manage authorizations



Click on Create New Authorization

ASTRA » - Windows Internet Explorer

W https://ucs.admin.washington.edu/astra/secureID/createAuthz.aspx?g=1c7399c2-e7f4-4e97-9c5

ASTRA »

Home Search & Edit Authorizations Create New Authorization Cart/Checkout (0 Items)

Create New Authorization

FAQs

- What is an Authorizer?
- How do I delete an authorization?
- How do I find the person I want to authorize?
- What is the difference between application, role, and action?
- How can I show all 'Limit's?
- Can I create authorization for multiple limits (ie; budgets, orgs, colleges, etc.)?
- More ...

Hide advanced filter options [Help]

Unfiltered

Choice of affiliations:

student staff faculty [Default]

Burns, Tom

0 person selections: multiple person selections allowed

Application: eProc (eProcurement)

Role: Please Select a Role

Action: Please Select an Action

Limit: Please Select a Limit

ASTRA Role: [Help]

User Authorizer Delegator

Effective Dates: 7/29/2008 to No End Date

Identify User by Name, UWNetId or EID. Click on Find & Verify.
If you can't find the user, click on Show Advanced Filter Options & then on the Unfiltered button.

W https://ucs.admin.washington.edu/astra/secureID/createAuthz.aspx?g=aec36d9-bc01-4c0d-a22d-7be3c837ca36

ASTRA »

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Hide advanced filter options [Help]

Unfiltered

Choice of affiliations:

student staff faculty [Default]

Enter name (last, first), UW NetID, or Employee ID

1 person selection: multiple person selections allowed

Name	UW NetID	Employee ID	Department	Affiliation
<input type="button" value="Remove"/> BURNS, TOM	burnst	affiliante		

Application: eProc (eProcurement)

Role: Approver

Action: Approve

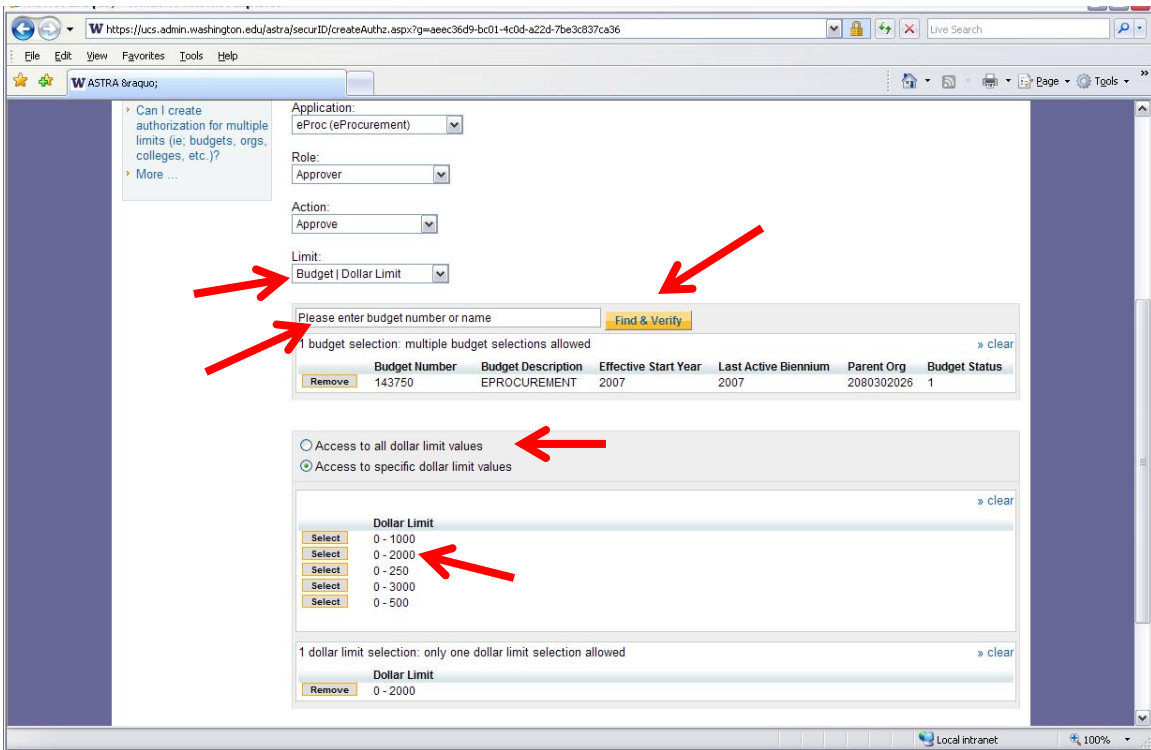
Limit: Please Select a Limit

ASTRA Role: [Help]

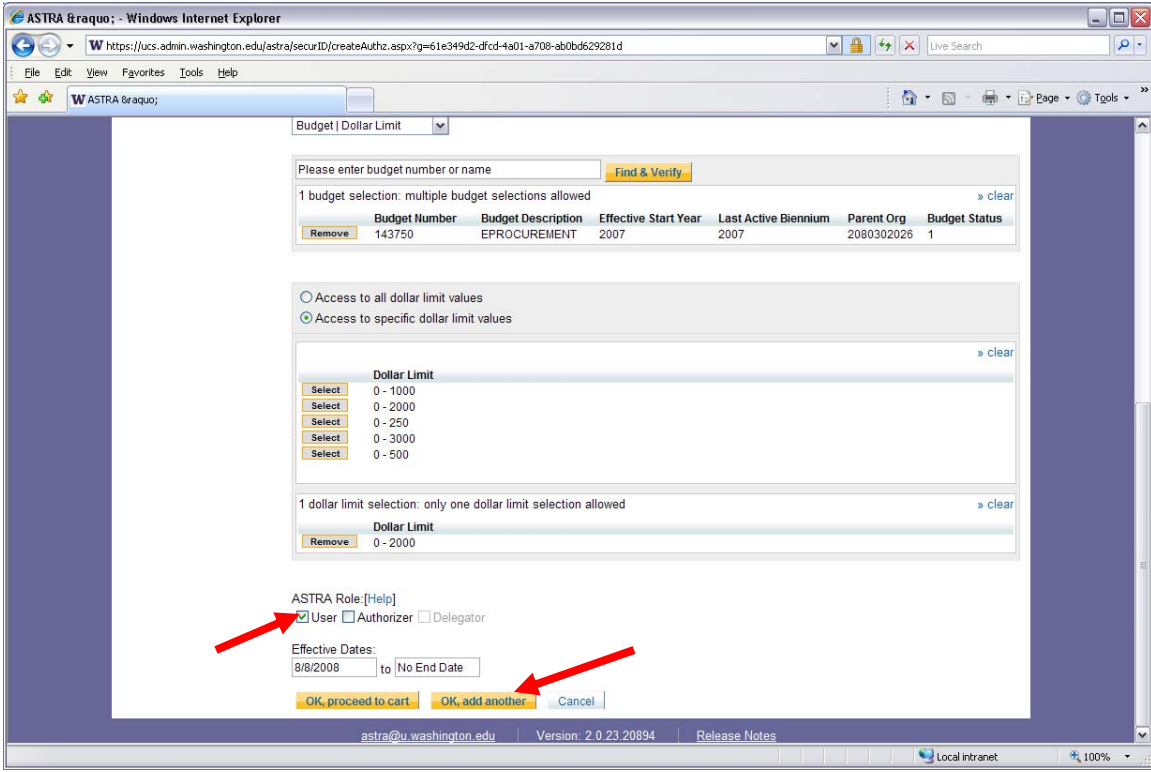
User Authorizer Delegator

Effective Dates:

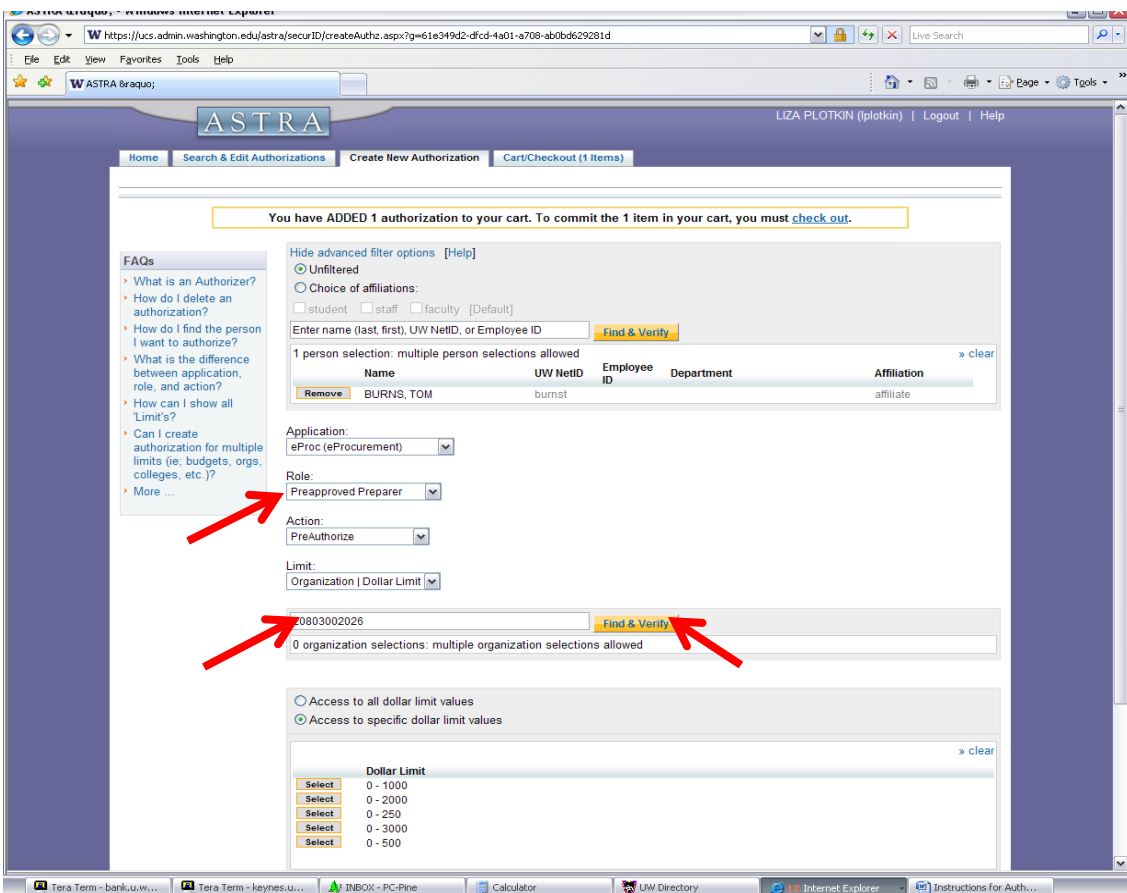
This user will be authorized for all three roles. Having all three roles is not necessary.
Choose eProcurement for Application and Approver for Role.



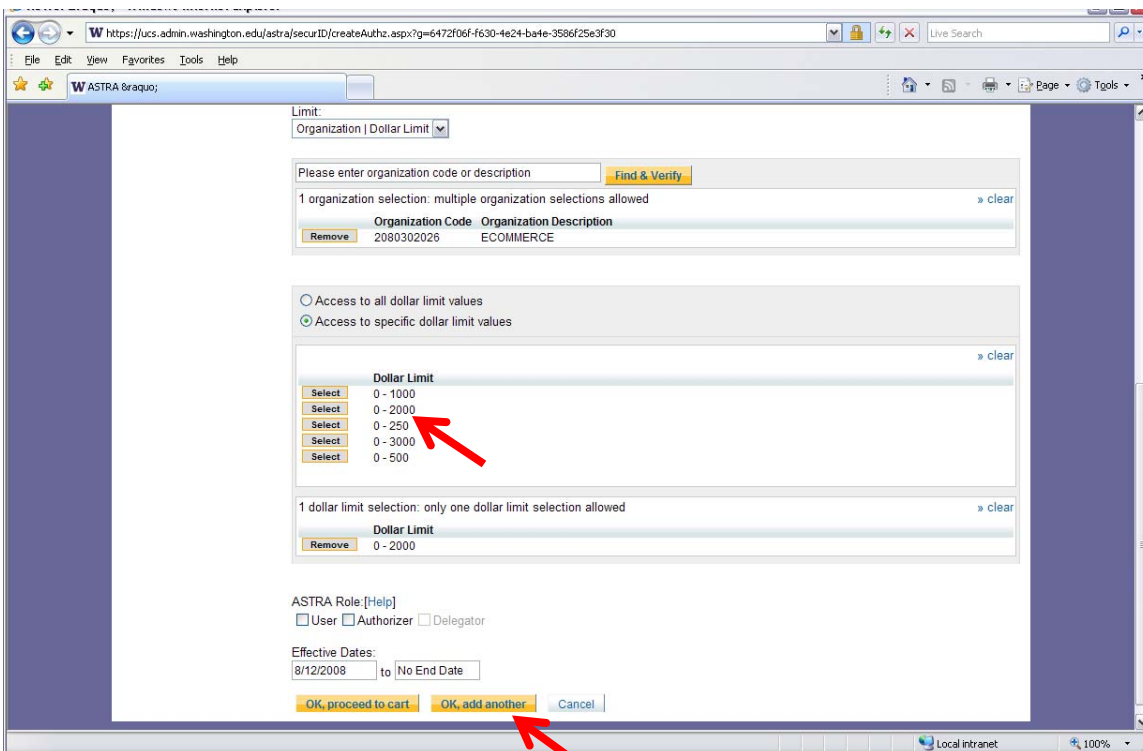
**Choose Budget or Organization under Limit.
 Type budget or org code. Click on Find & Verify.
 Select a dollar limit. For the limit over \$3,000 click on Access to all dollar limit values.**



**Click on User under ASTRA Role. Click on OK, Add Another.
 One authorization will be added to your cart.
 Repeat the same steps for entries with additional budget(s)/org. code(s) or for
 different dollar limit(s) if needed. Otherwise, proceed to the next role.**



Choose Preapproved Preparer under Role & Budget or Organization under Limit. Type budget or org code. Click on Find & Verify.



Select a Dollar limit for the entry. Click on OK, add another. The 2nd authorization will be added to your cart. Repeat the same steps for entries with additional budget(s)/org. code(s) or for different dollar limit(s) if needed. Otherwise, proceed to the next role.

You have ADDED 1 authorization to your cart. To commit the 2 items in your cart, you must [check out](#).

FAQs

- What is an Authorizer?
- How do I delete an authorization?
- How do I find the person I want to authorize?
- What is the difference between application, role, and action?
- How can I show all 'Limits'?
- Can I create authorization for multiple limits (ie, budgets, orgs, colleges, etc.)?
- More ...

Hide advanced filter options [Help]

Unfiltered

Choice of affiliations:

student staff faculty [Default]

Enter name (last, first), UW NetID, or Employee ID

1 person selection: multiple person selections allowed

Name	UW NetID	Employee ID	Department	Affiliation
<input type="button" value="Remove"/> BURNS, TOM	burnst			affiliate

Application:

Role:

Action:

Limit:

0 organization selections: multiple organization selections allowed

ASTRA Role:[Help]

User Authorizer Delegator

Effective Dates: to

**Choose Watcher under Role & Budget or Organization under Limit.
Type budget(s) and/or org code(s). Click on Find & Verify.
Create a multiple list of budgets and/or org codes if needed.**

Choice of affiliations:

student staff faculty [Default]

Enter name (last, first), UW NetID, or Employee ID

1 person selection: multiple person selections allowed

Name	UW NetID	Employee ID	Department	Affiliation
<input type="button" value="Remove"/> BURNS, TOM	burnst			affiliate

Application:

Role:

Action:

Limit:

Please enter organization code or description

1 organization selection: multiple organization selections allowed

Organization Code	Organization Description
<input type="button" value="Remove"/> 2080302026	ECOMMERCE

ASTRA Role:[Help]

User Authorizer Delegator

Effective Dates: to

**All eProcurement Authorizations have been created. Click on OK, proceed to cart.
Typically, the user has one or two roles but may have all three as in this case.**

The screenshot shows the ASTRA Cart/Checkout interface. At the top, there are navigation tabs: Home, Search & Edit Authorizations, Create New Authorization, and Cart/Checkout (3 Items). Below the tabs, there are buttons for 'Checkout Now', 'Notification & Ownership Options', and 'Clear Cart'. A FAQ sidebar is on the left. The main content area contains a table of authorization items. A red arrow points to the 'Checkout Now' button at the bottom of the table.

Remove	USER	eProc (eProcurement)	Effective 8/12/2008
Action: ADD	Owner: LIZA PLOTKIN	Watcher/ Watch Organization: 2080302026 ECOMMERCE	Authority: Active
Remove	TOM BURNS AUTHORIZER	eProc (eProcurement)	Effective 8/12/2008
Action: ADD	Owner: LIZA PLOTKIN	Preapproved Preparer/ PreAuthorize Organization: 2080302026 ECOMMERCE Dollar Limit: 0 - 2000 0 - 2000	Authority: Active
Remove	TOM BURNS USER	eProc (eProcurement)	Effective 8/12/2008
Action: ADD	Owner: LIZA PLOTKIN	Approver/ Approve Budget: 143750 EPROCUREMENT Dollar Limit: 0 - 2000 0 - 2000	Authority: Active

If Notification & Ownership options need to be changed, click on the corresponding button. Otherwise, click on Checkout Now.