


eProcurement Training



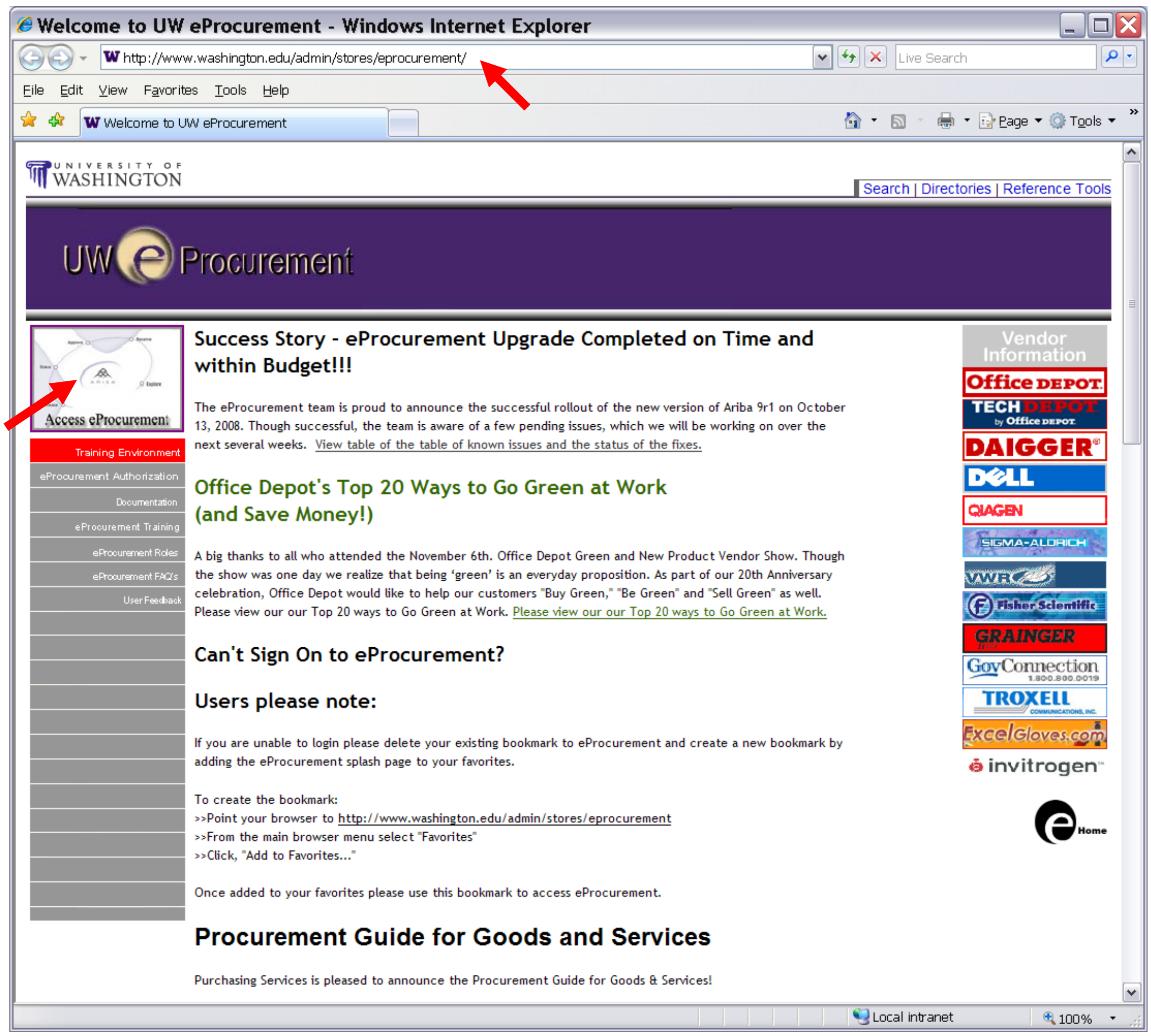
eProcurement Help Desk 206-685-3558

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

UW eProcurement Website

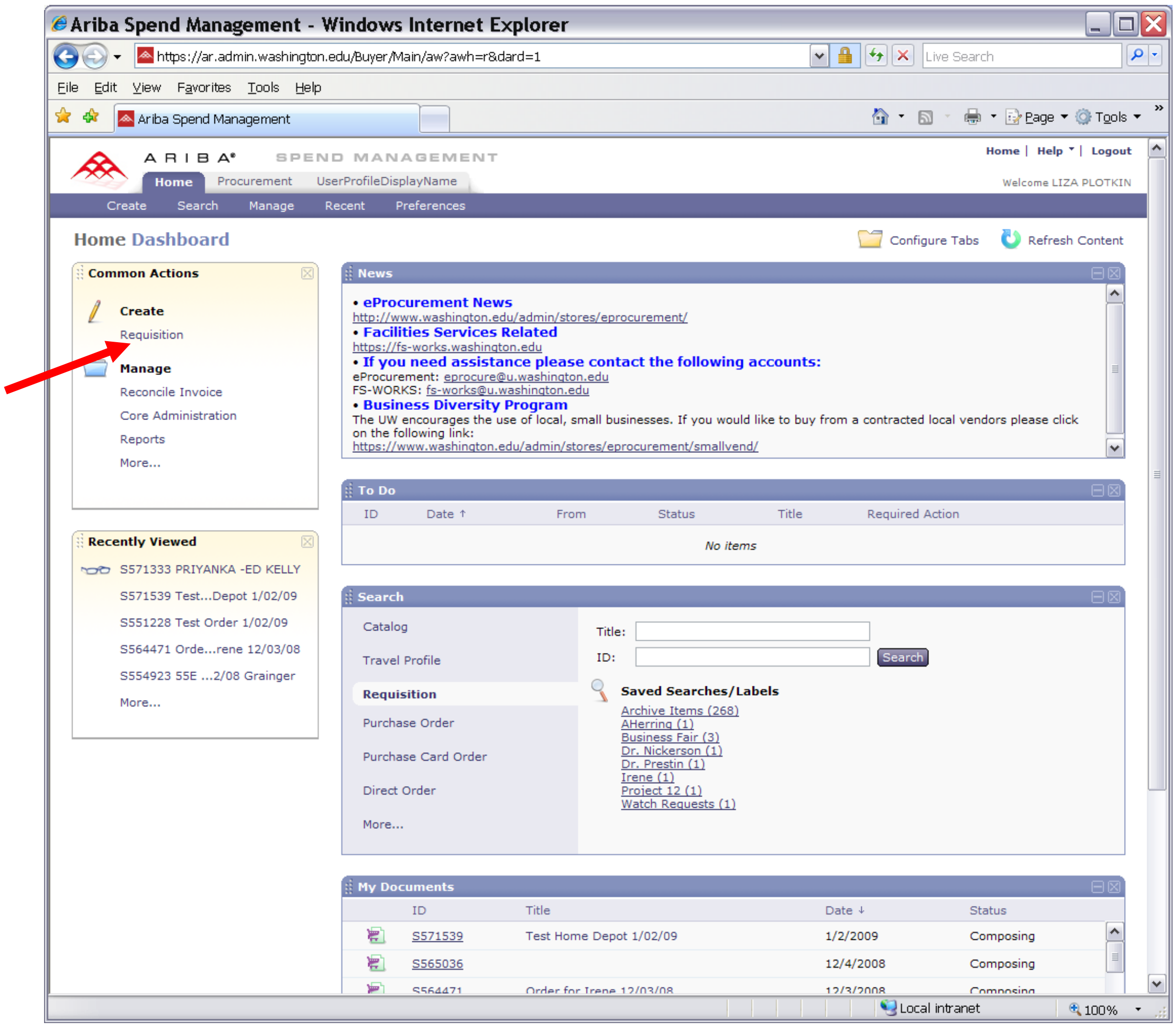
Do the following to access the Ariba Spend Management system:

1. Login into the UW eProcurement website at www.washington.edu/admin/stores/eprocurement
2. Click on **Access eProcurement** in the upper left corner of the screen



Guide to Creating a Requisition with Multiple Vendors

Click on **Create Requisition** under **Common Actions** on the left side to start the order.*

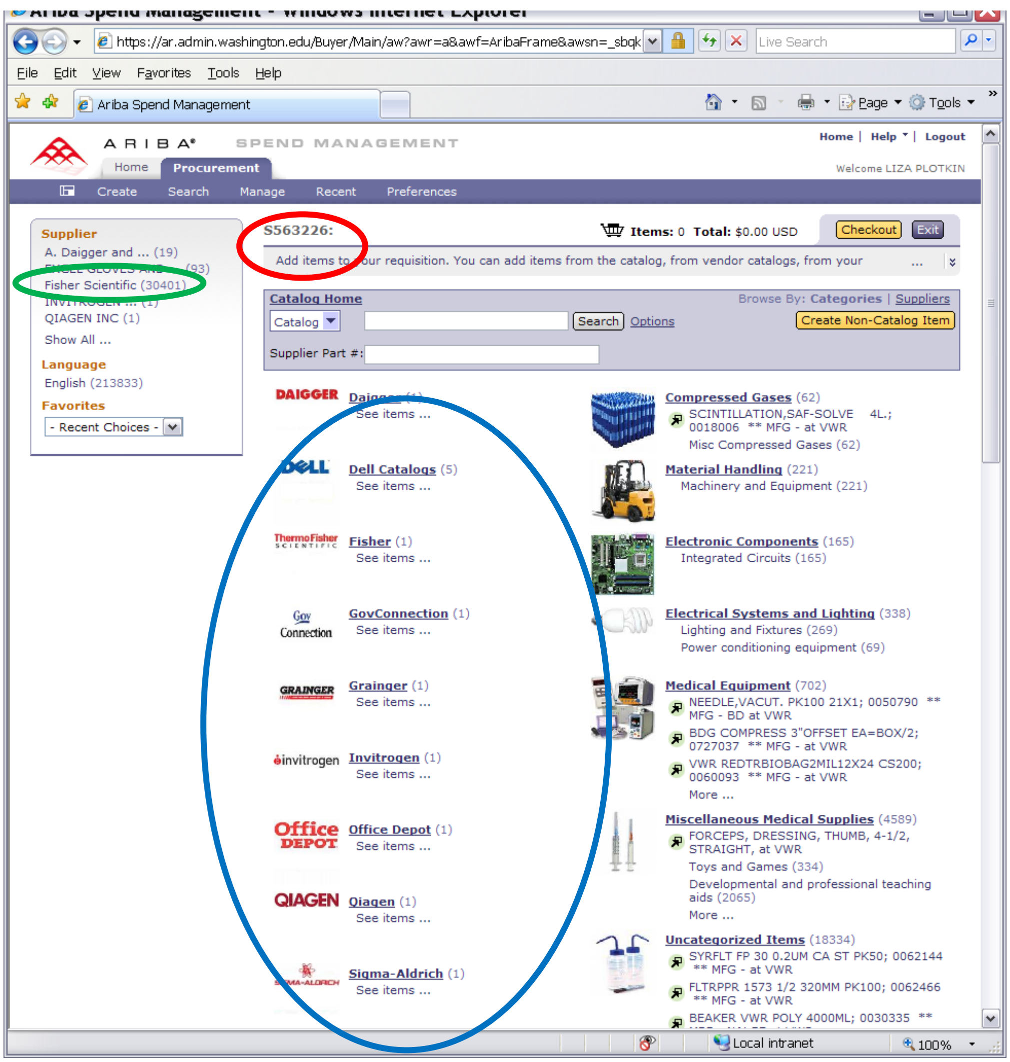


*Budgets numbers and item numbers in this manual are used only as examples, The system has automatically assigned a **requisition number** to the order in the upper left corner – S563226. When the requisition is submitted and the order goes through, the system will assign a Purchase Order number which starts with the "**EP**". The requisition number is our internal number. When the outside vendors are contacted for the status check of the order or for return, they should be supplied with the "**EP**" number. The "**EP**" number is the only number that flows throughout the order process and should be used during the reconciliation process.

On the **Procurement** screen choose one of the following vendors:

1. Hosted catalogs – **Excel Gloves (circled in green)**
2. Punchout catalogs –**Daigger, Dell, Fisher, GovConnection, Grainger, Invitrogen, Office Depot, Quigen, Sigma-Aldrich, Tech Depot, Troxell Communications, VWR (circled in blue).***

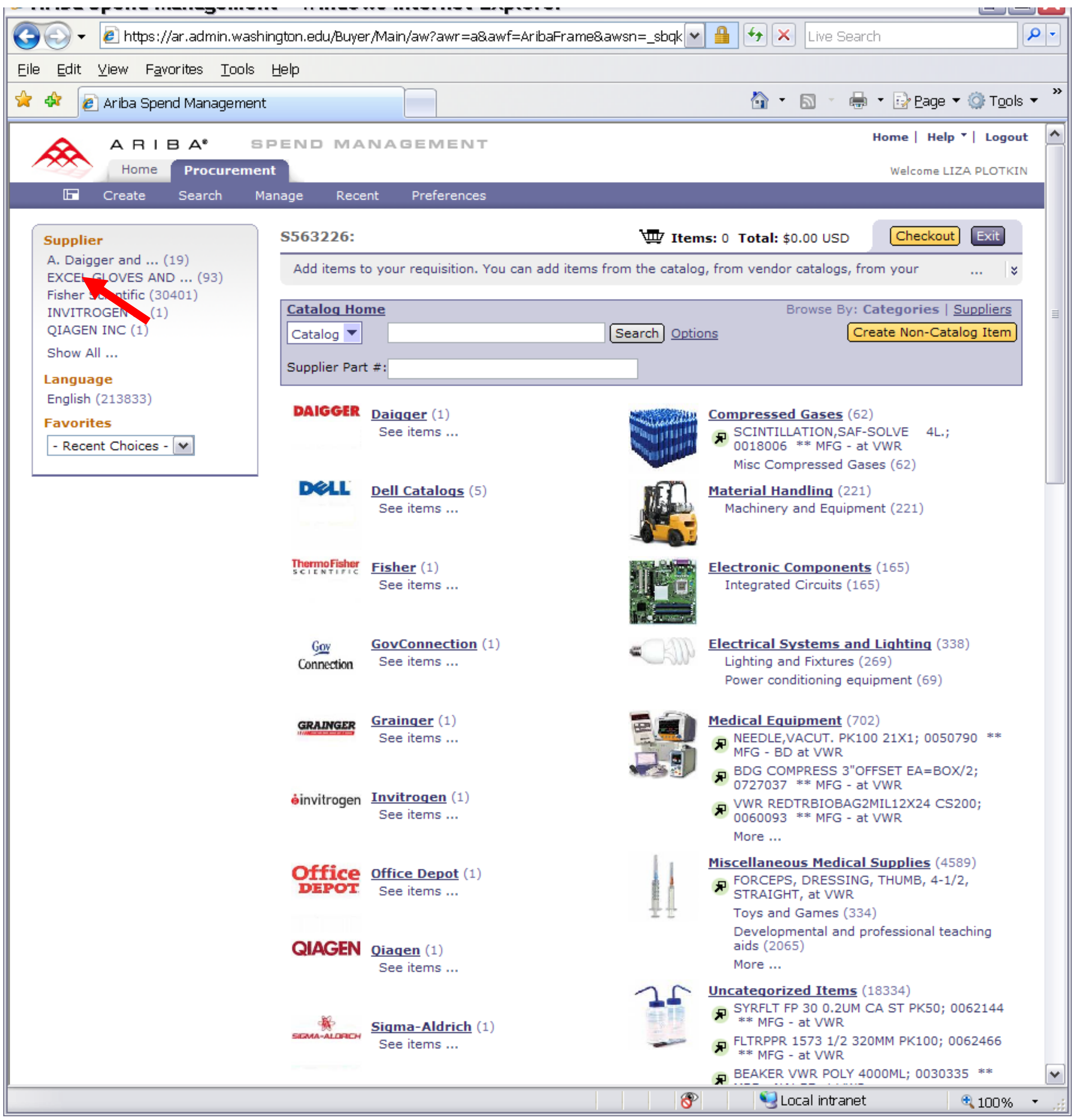
To order from any **catalog** click on the link below each catalog.



**This list keeps expanding when new vendors are being added to the eProcurement system.*

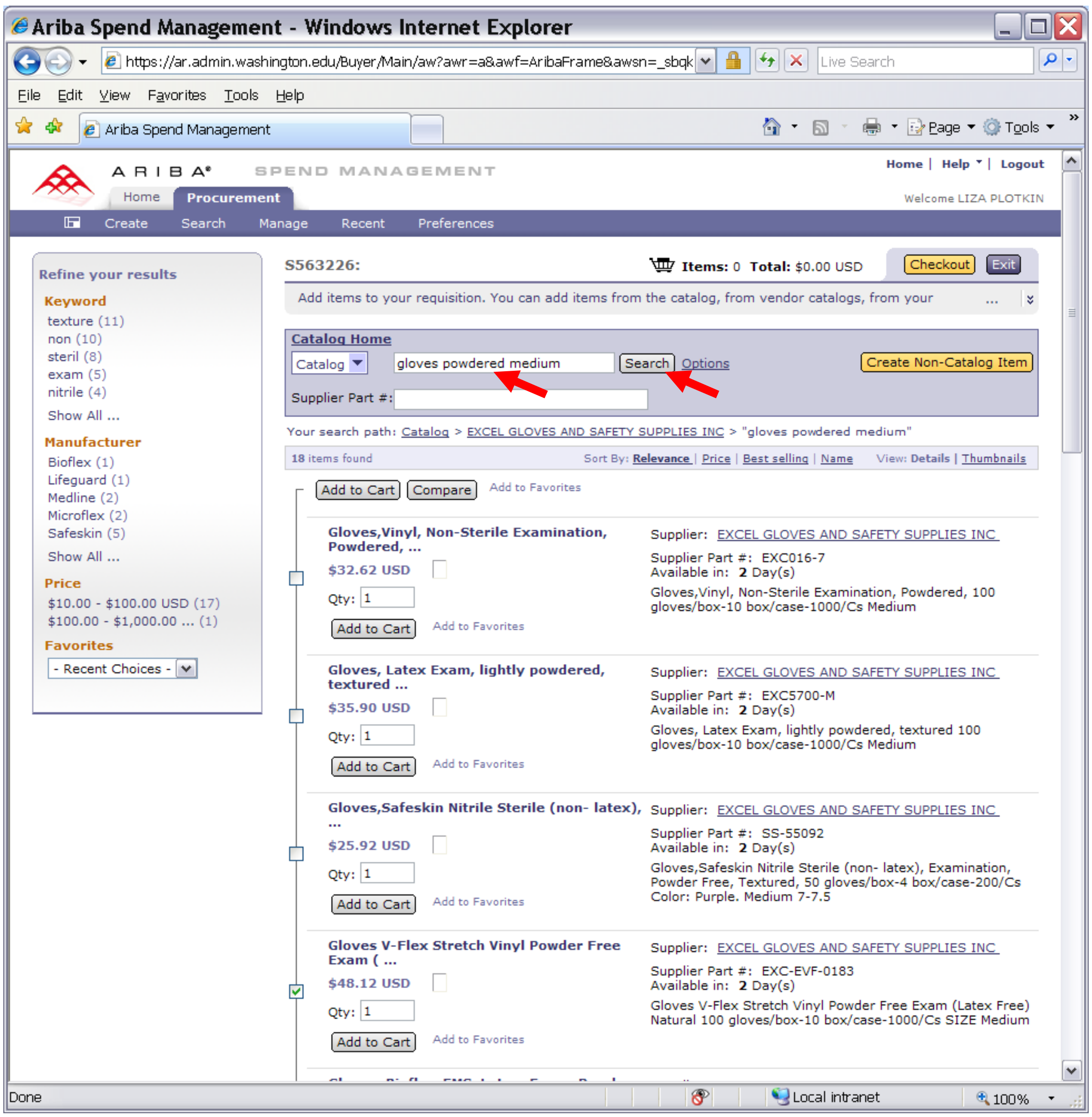
Ordering from a Hosted Catalogue

The first item will be ordered from **Excel Gloves**, a **Hosted** catalog.
Click on **Excel Gloves** in the Supplier window on the left side of the screen.

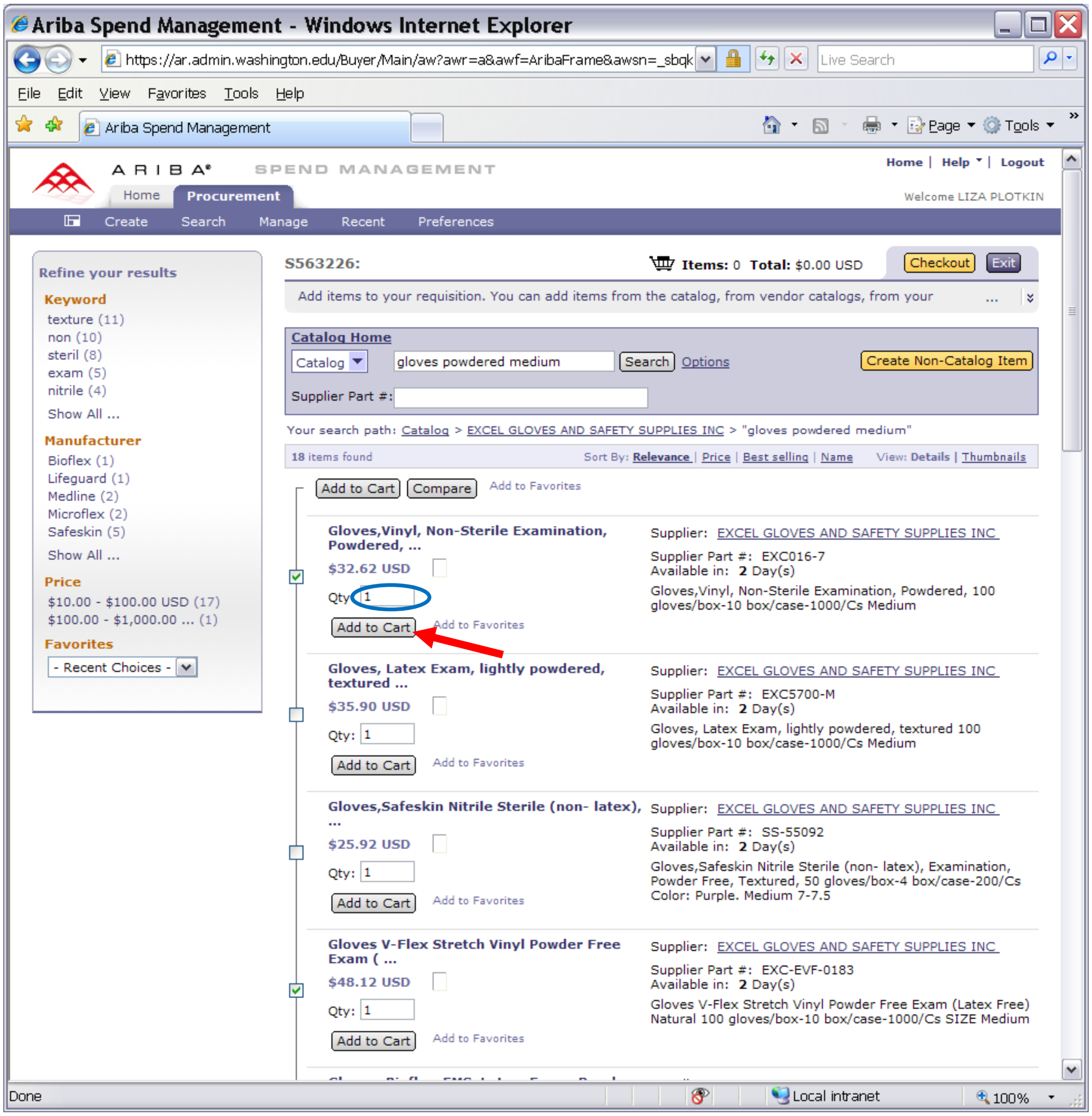


Items from Excel Gloves catalog will be displayed on the screen.
You can search for items either by **Keyword** or by **Item Number**.

1. Type **gloves powdered medium** in the field to the left of the Search button (type the **item number** if known).
2. Click on **Search**



1. Find the **gloves** you need, enter **quantity**
2. Click on **Add to Cart**

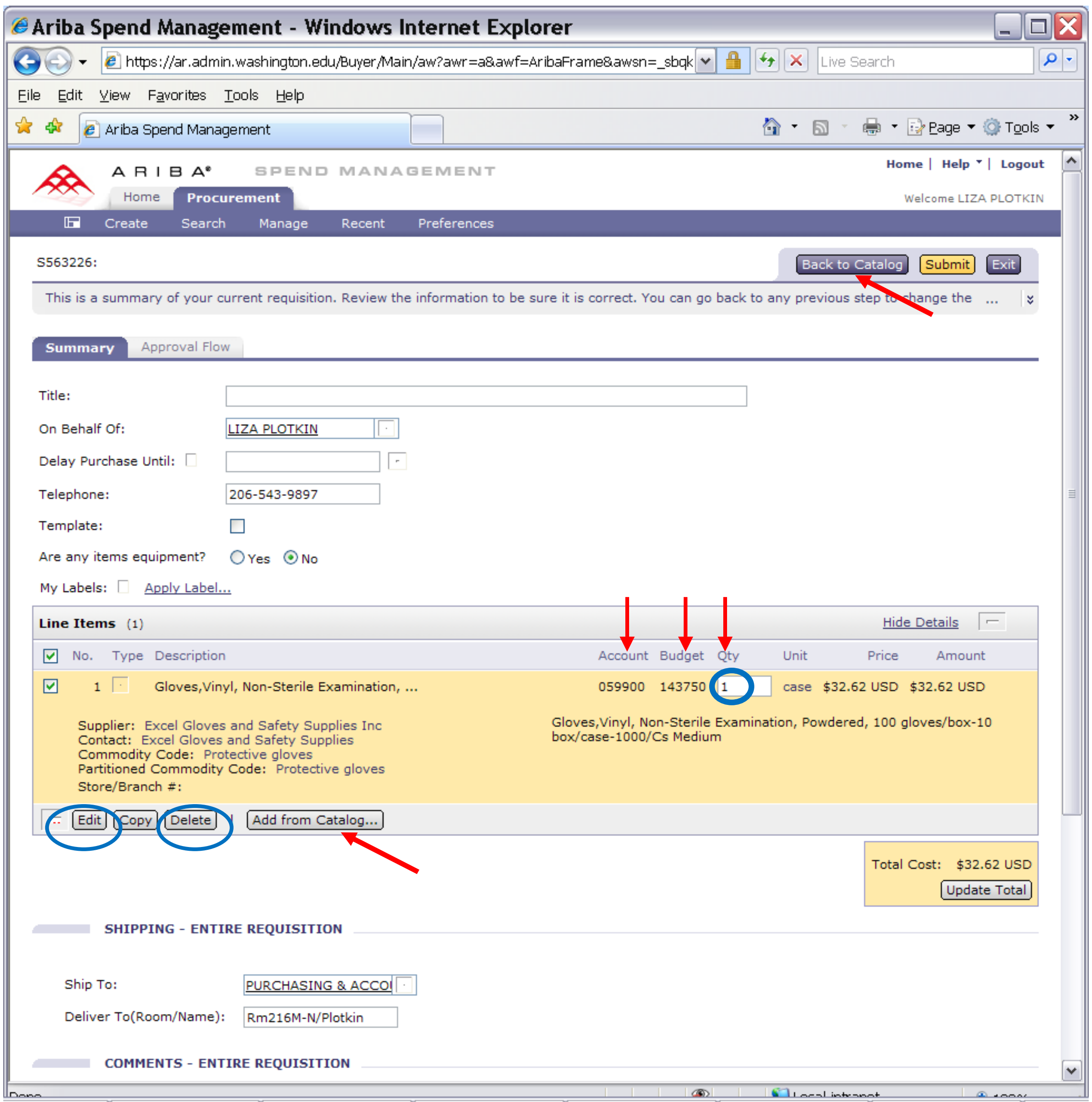


One **item** is displayed on the **Summary** screen.

On this screen you can do the following for the Hosted Catalogs items:

1. Locate and Change the **Account Code** if needed.
2. Locate and change the **budget number** if needed.
3. Change the **Quantity** of the item if **needed**. In our example Qty has been changed to **3**.
4. **Edit** your item (by changing the budget and/or account code) or **Delete** it if necessary.

To **add** another item Click on **Add Items** command or on **Back to Catalog** command.

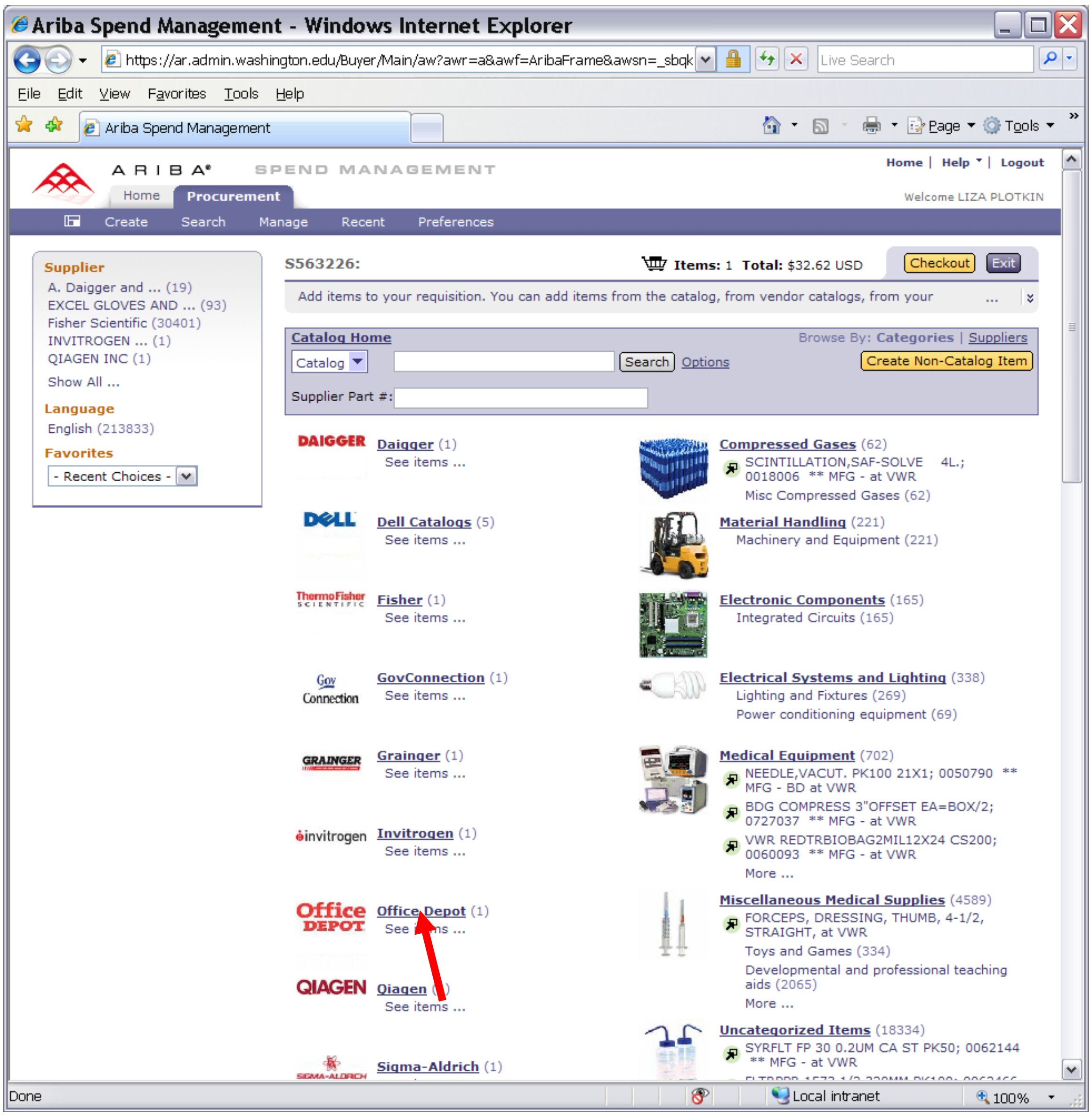


Ordering from Punchout Vendors

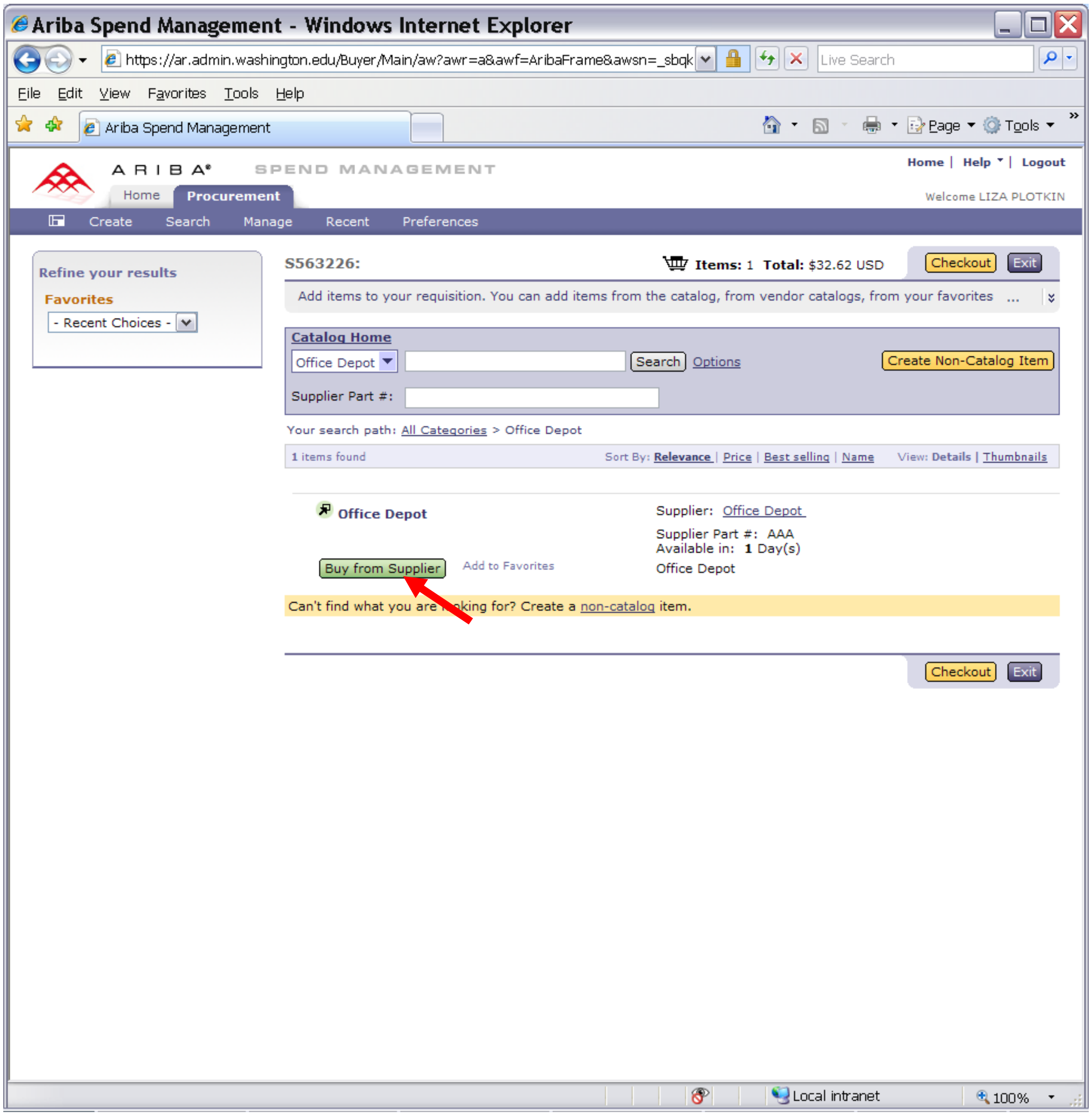
You are **back** to the Summary screen where you picked your first item.
You can order from **multiple** vendors on the same requisition.

Office Depot Order

The second item will be ordered from the **Office Depot** catalog.
Click on the **Office Depot** link in the right column of the punchout vendor's list.

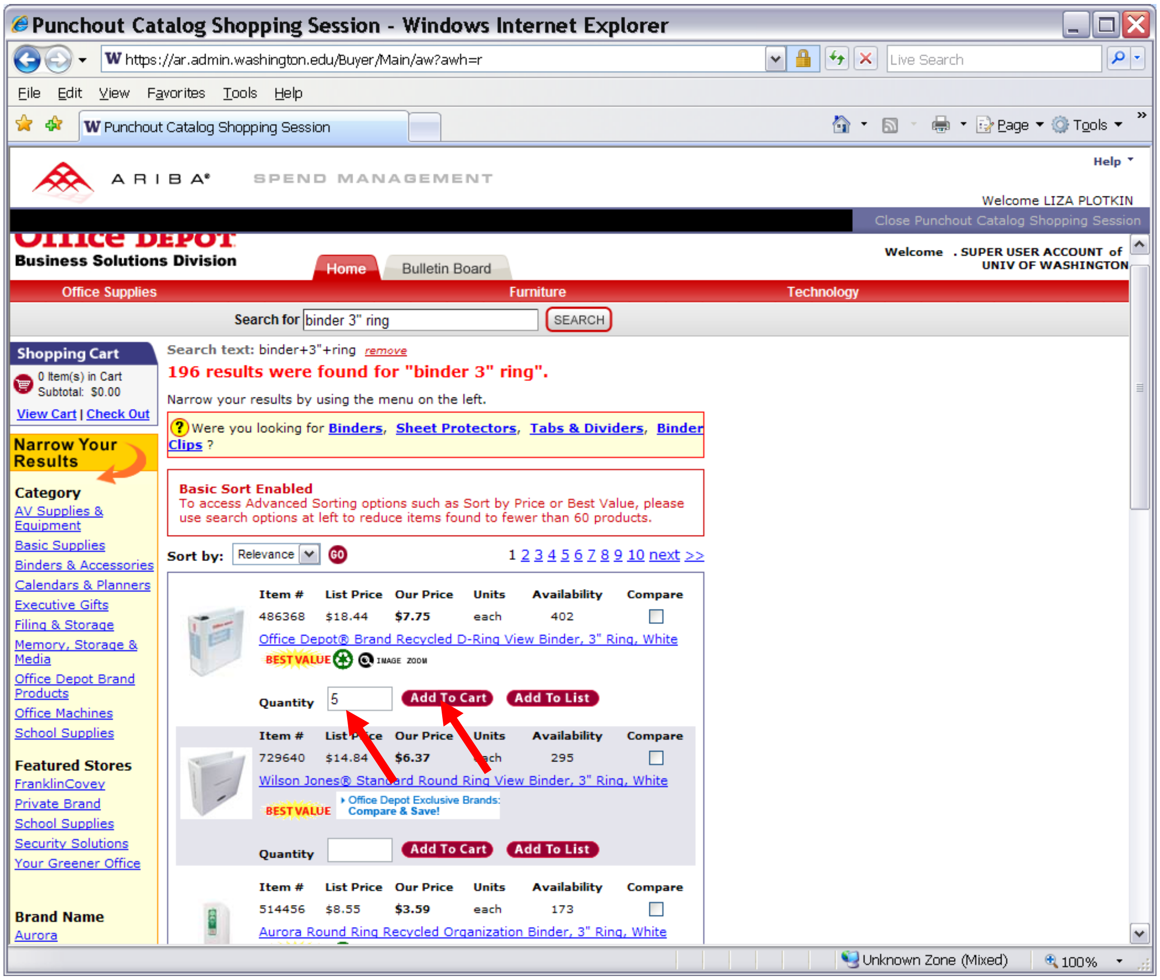


Click on the **Buy from Supplier** button.



In the **Search for** field type either the **item's description** or the actual **item number** of the item you are looking for.
Click on **Search.**

Type the quantity into the **Quantity** field
Click on **Add to Cart** button.

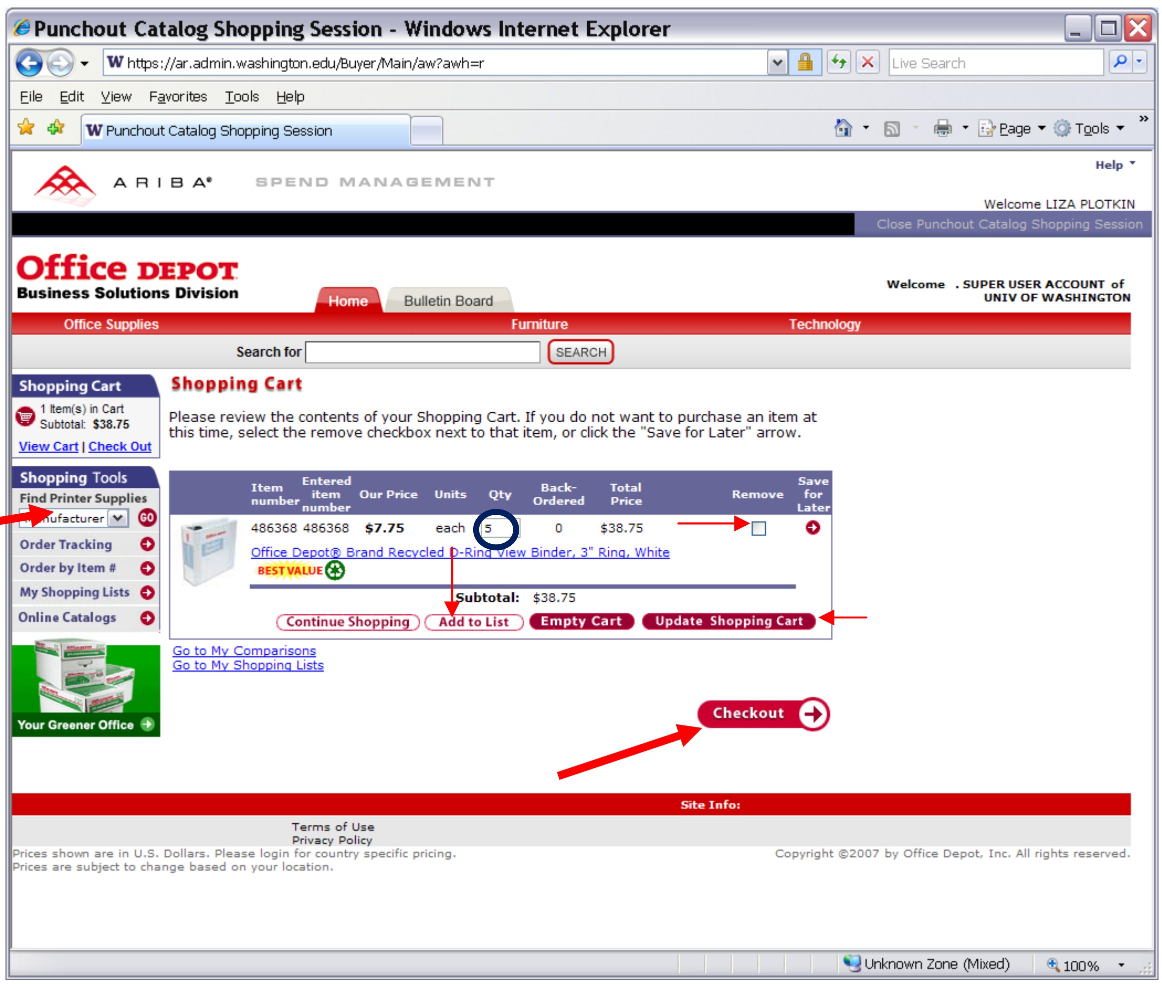


One item has been **added** to the **Shopping Cart**.

You can do several things in the Shopping Cart if needed:
1. **Change** the **Quantity** of the item by overwriting the **Qty** field, then click on **Update Shopping Cart**
2. **Remove** the item from the cart by checking the **Remove** box, then click on **Update Shopping Cart**
3. **Add** the item to the **List** of your favorite items*

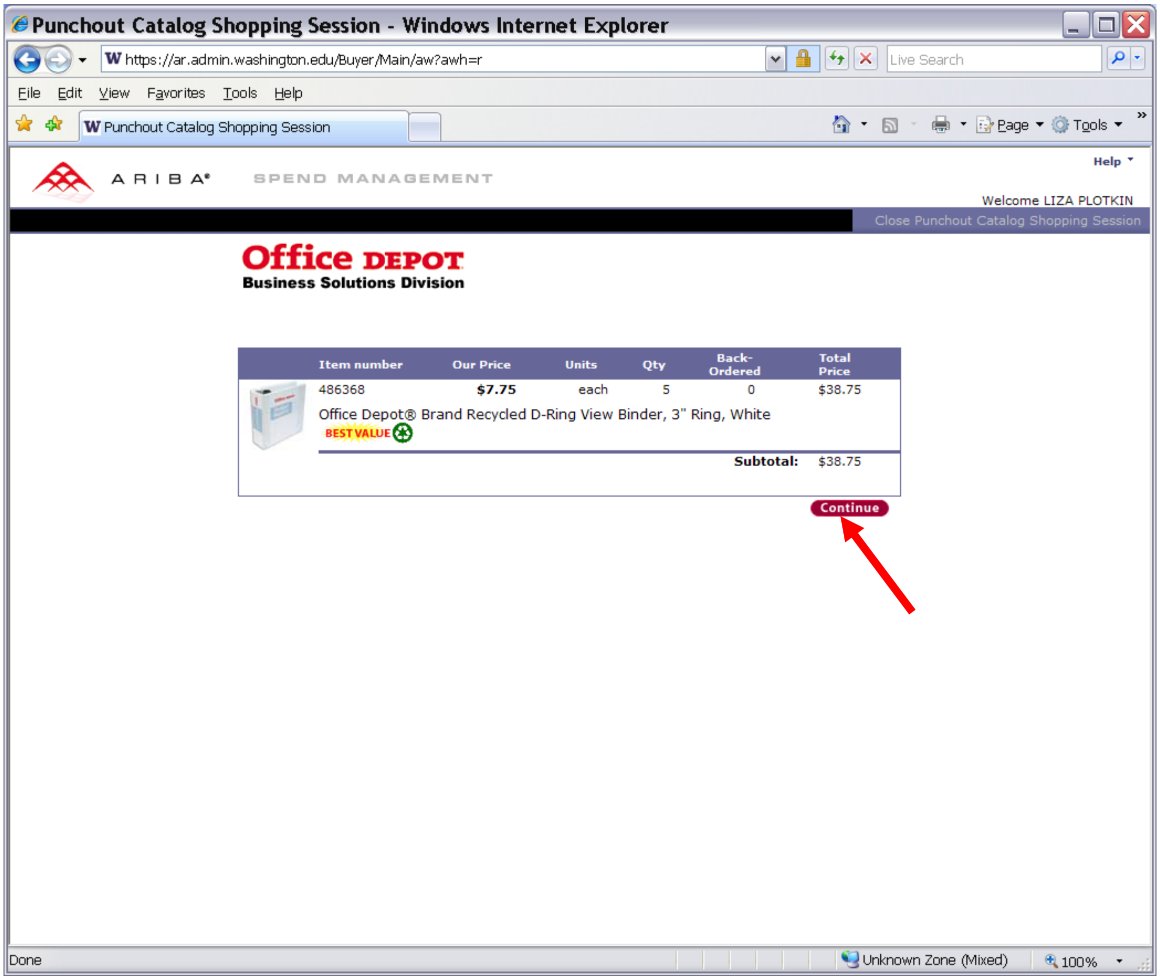
If another item is needed, type either the **description** or the **item number** in the **Search** field again, click on **Search.**

If done with ordering from Office Depot, click on **Checkout.**



*This is the link to the instructions for creating Shopping Lists in Office Depot catalog: www.washington.edu/admin/stores/eprocurement/documentation/documentation.html

Click on **Continue.**



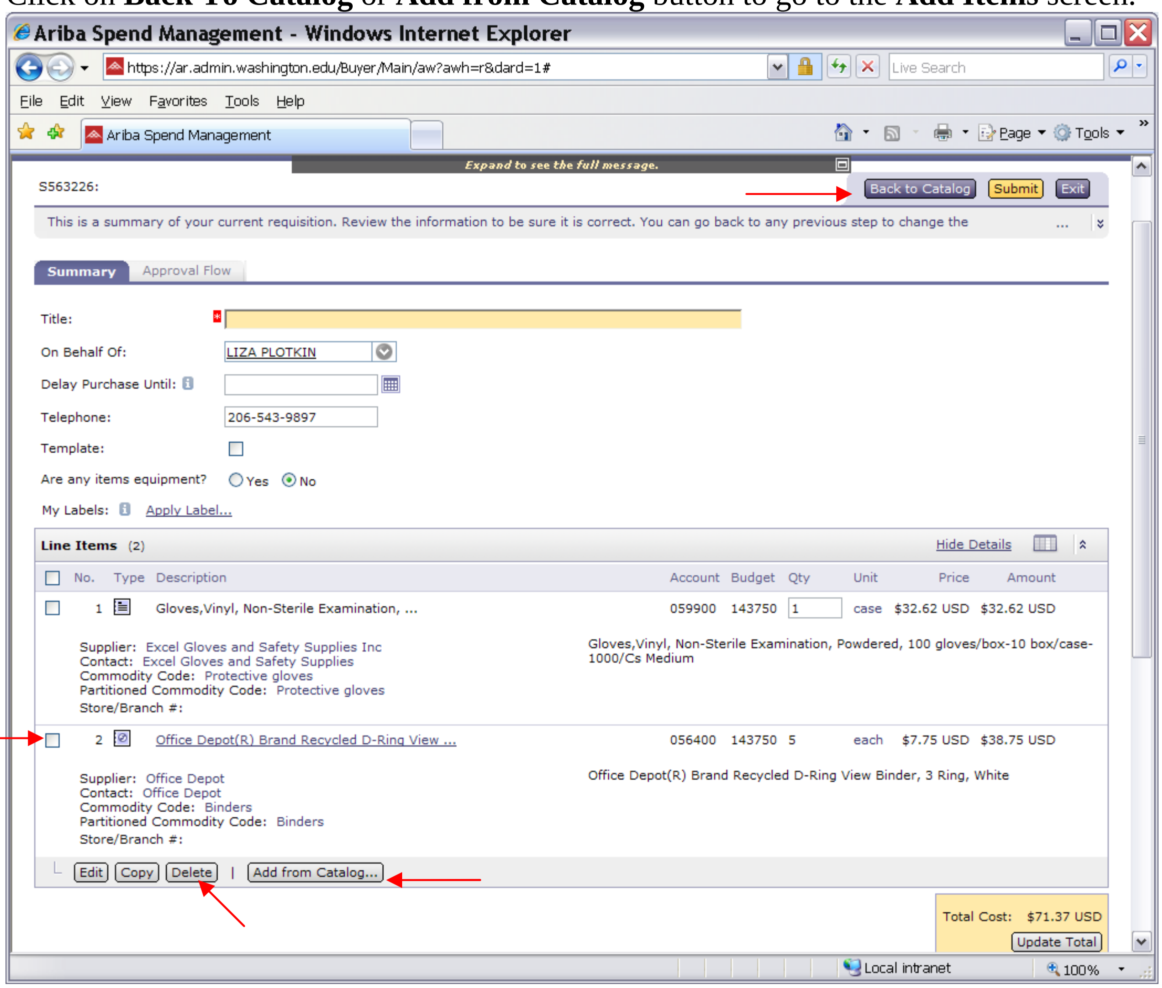
You **now** have **two** items in the on the **Summary** screen: one from a Hosted catalog and one from the Office Depot.

You can't overwrite the Quantity but you can delete the Office Depot item from the Summary screen.
To delete the item **check** the **Box** to the left of it, click on the **Delete** button below.

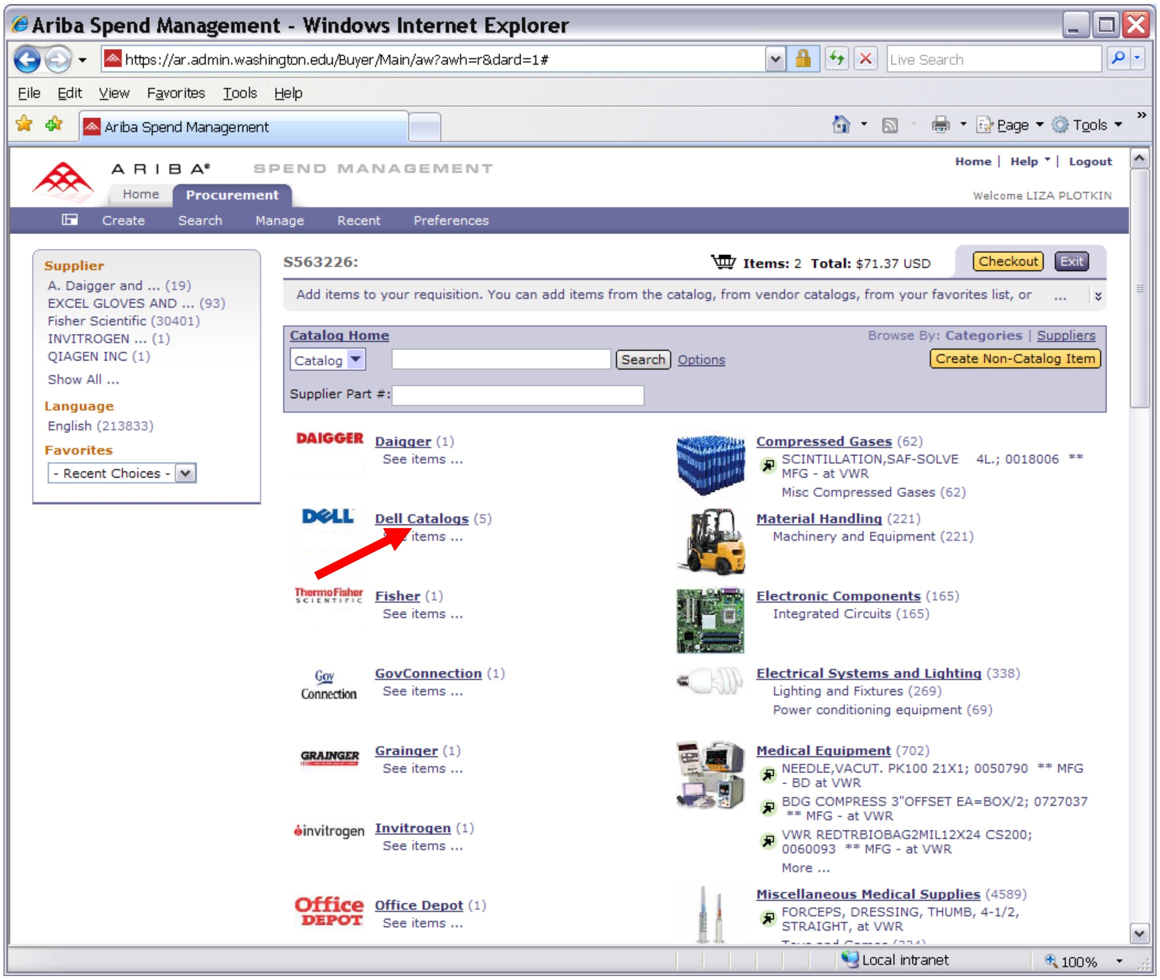
You can change the quantity of the item by updating the Office Depot Shopping Cart in the Office Depot catalog. Click on the Add from Catalog button and get into the Office Depot catalog. Then click on View Cart in the upper left corner of the catalog and update the quantity of the item if needed

Dell Order

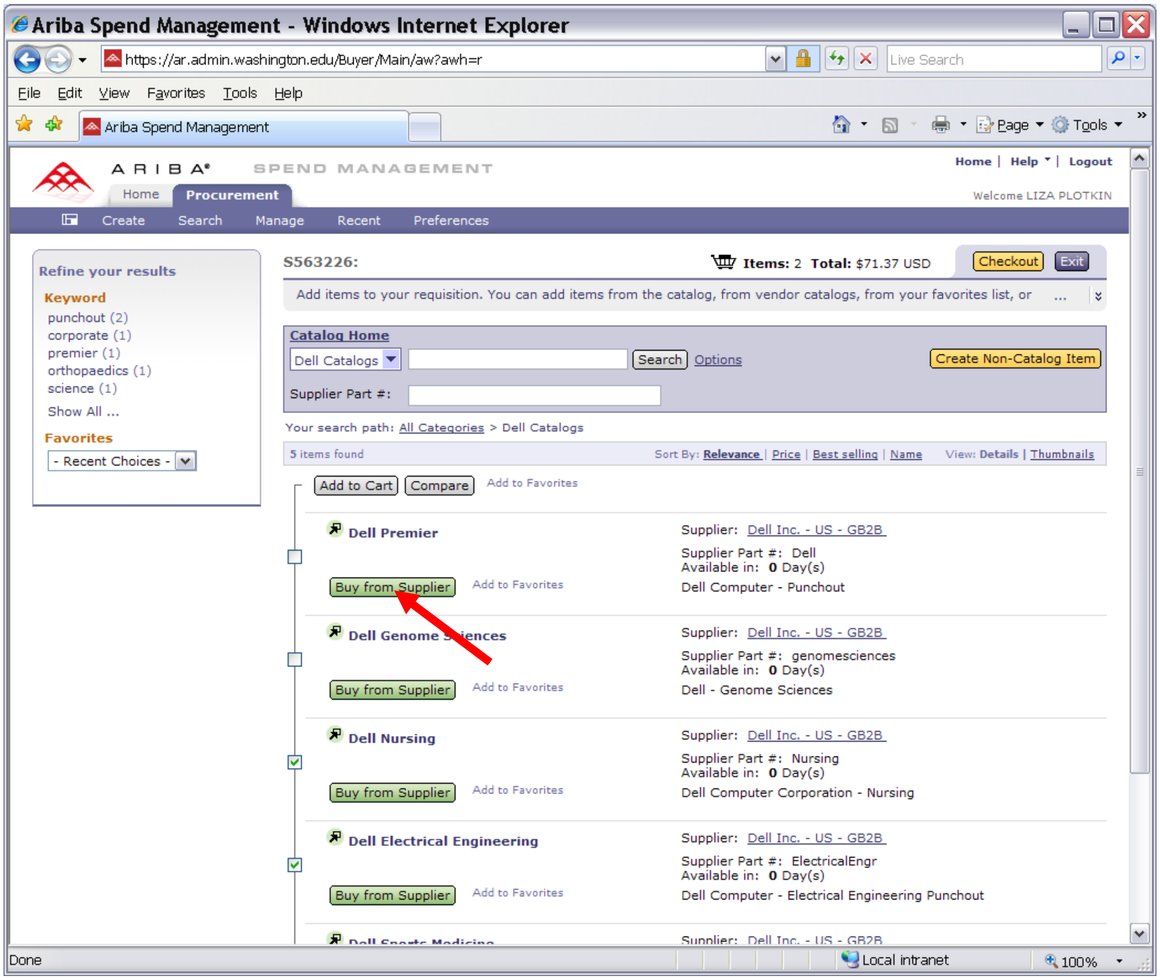
The **third** item will be ordered from **Dell**.
Click on **Back To Catalog** or **Add from Catalog** button to go to the **Add Items** screen.



Click on **Dell Catalogs**

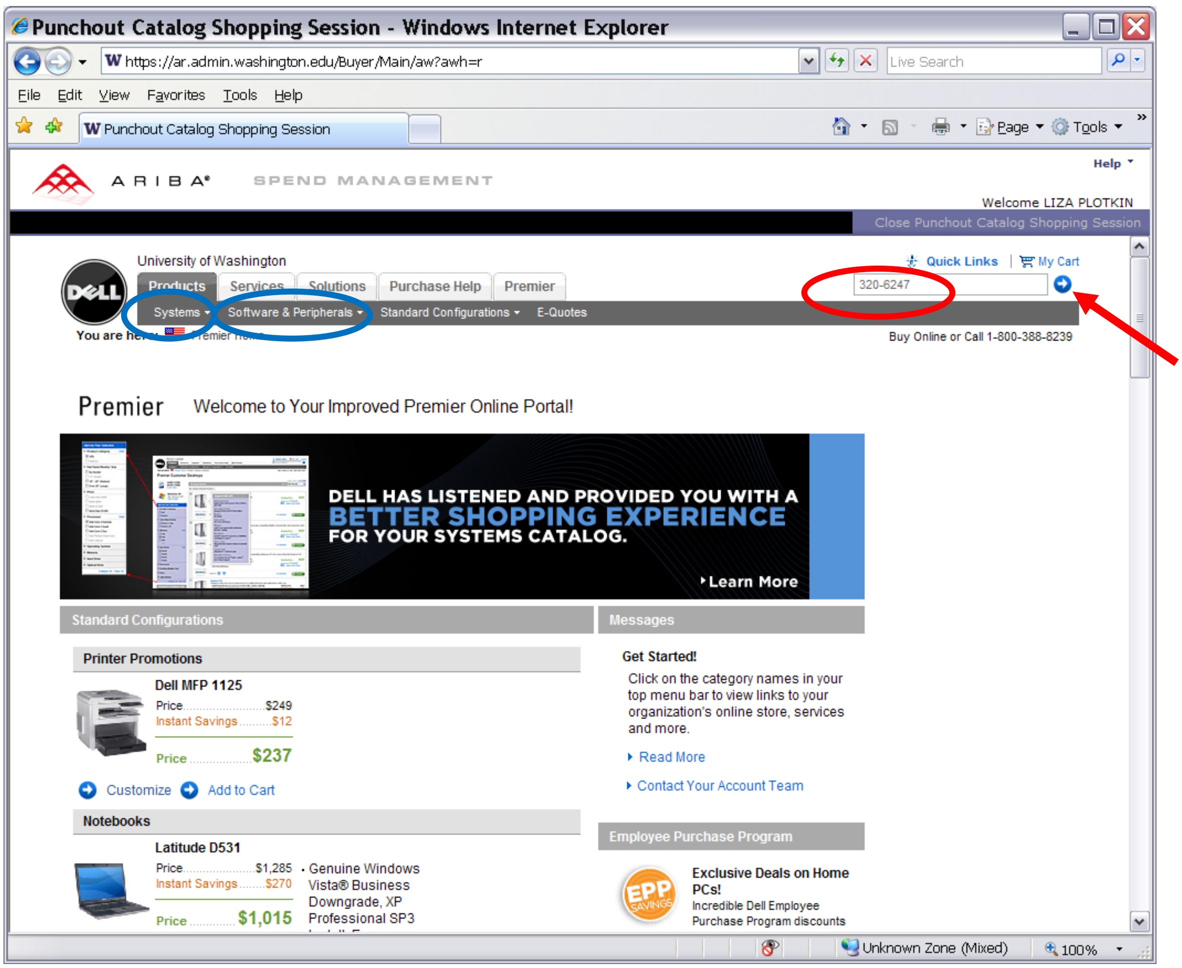


Choose the **right** Dell catalog for your department and click on **Buy from Supplier** button

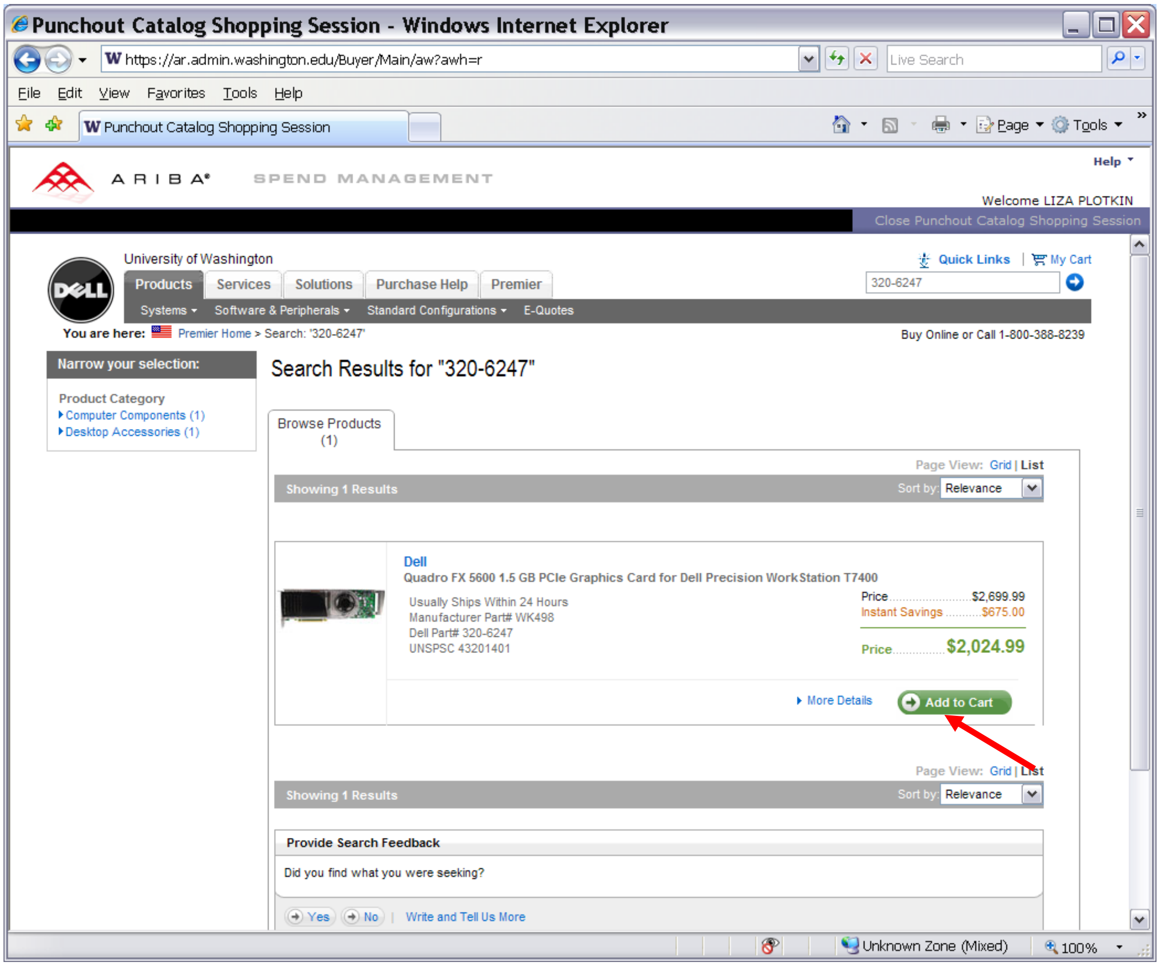


You can click on **Systems** to search for desktops or laptops or on **Software & Peripherals** tab to look for printers, software, networking devices, etc.

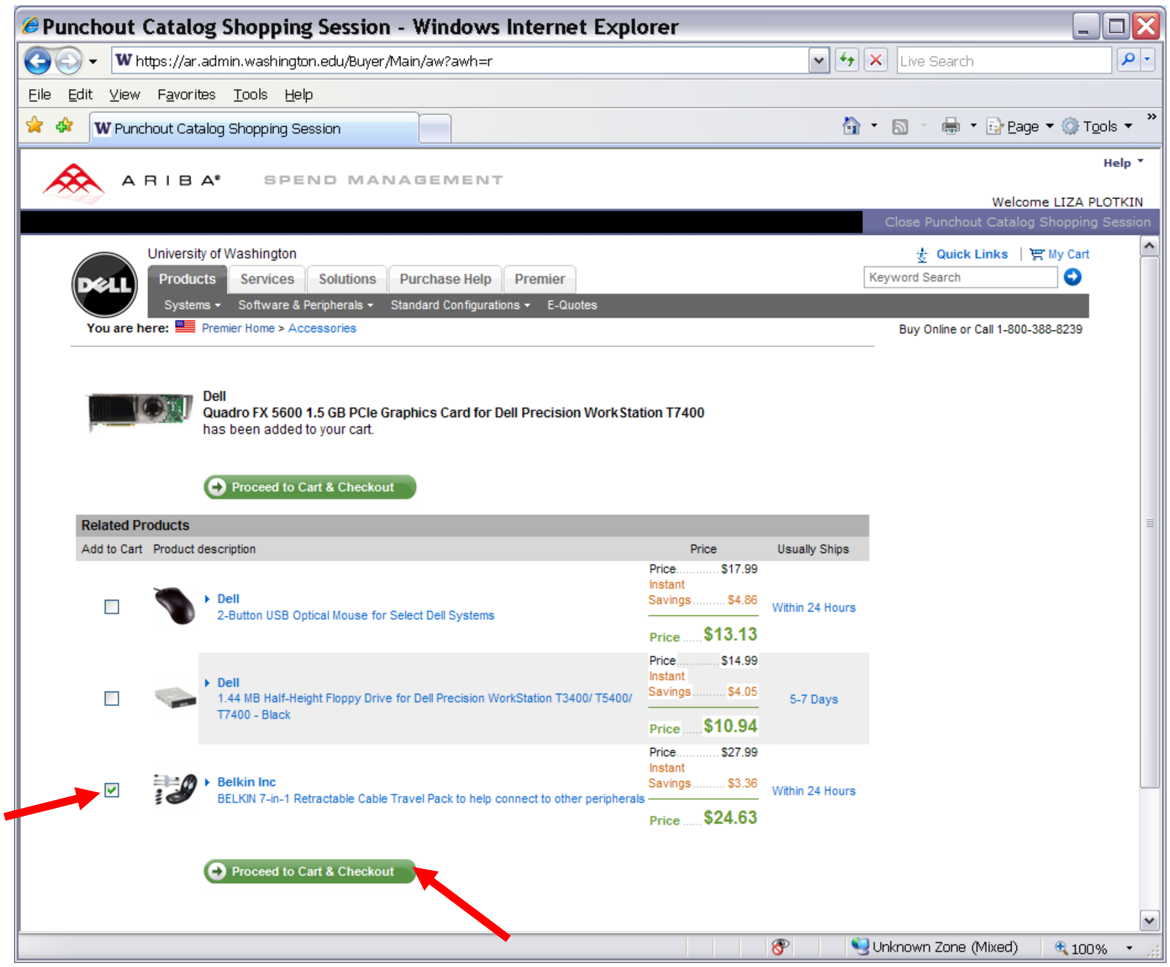
If you are looking for a **specific Dell part** number, enter it in the field at the upper right corner of the screen. You can also search **by keywords** in the same field.
Click on the **arrow** to the right to activate the search.



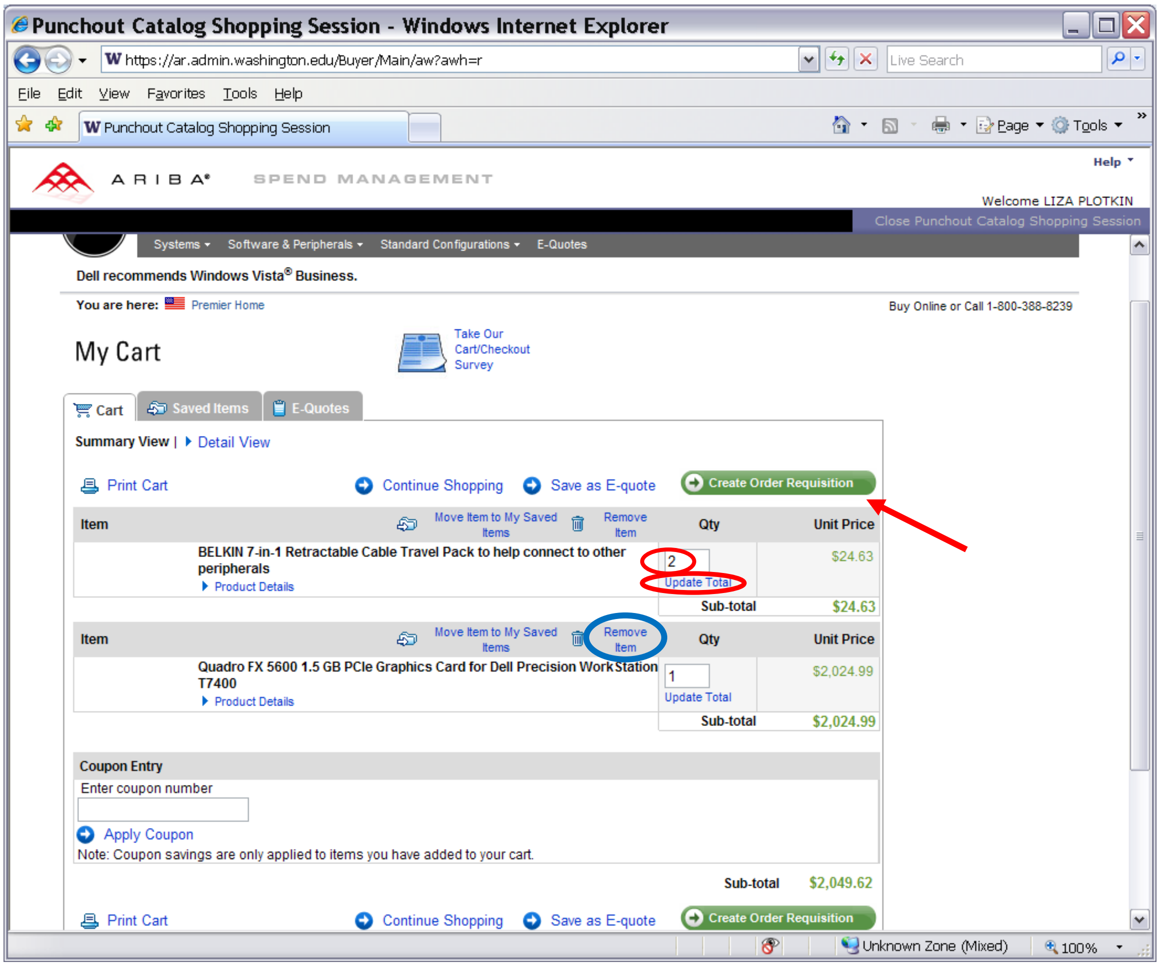
Click on **Add to Cart** if this is a correct item,



Check the **box** for any of the **Related Products** if needed
Click on **Proceed to Cart & Checkout**



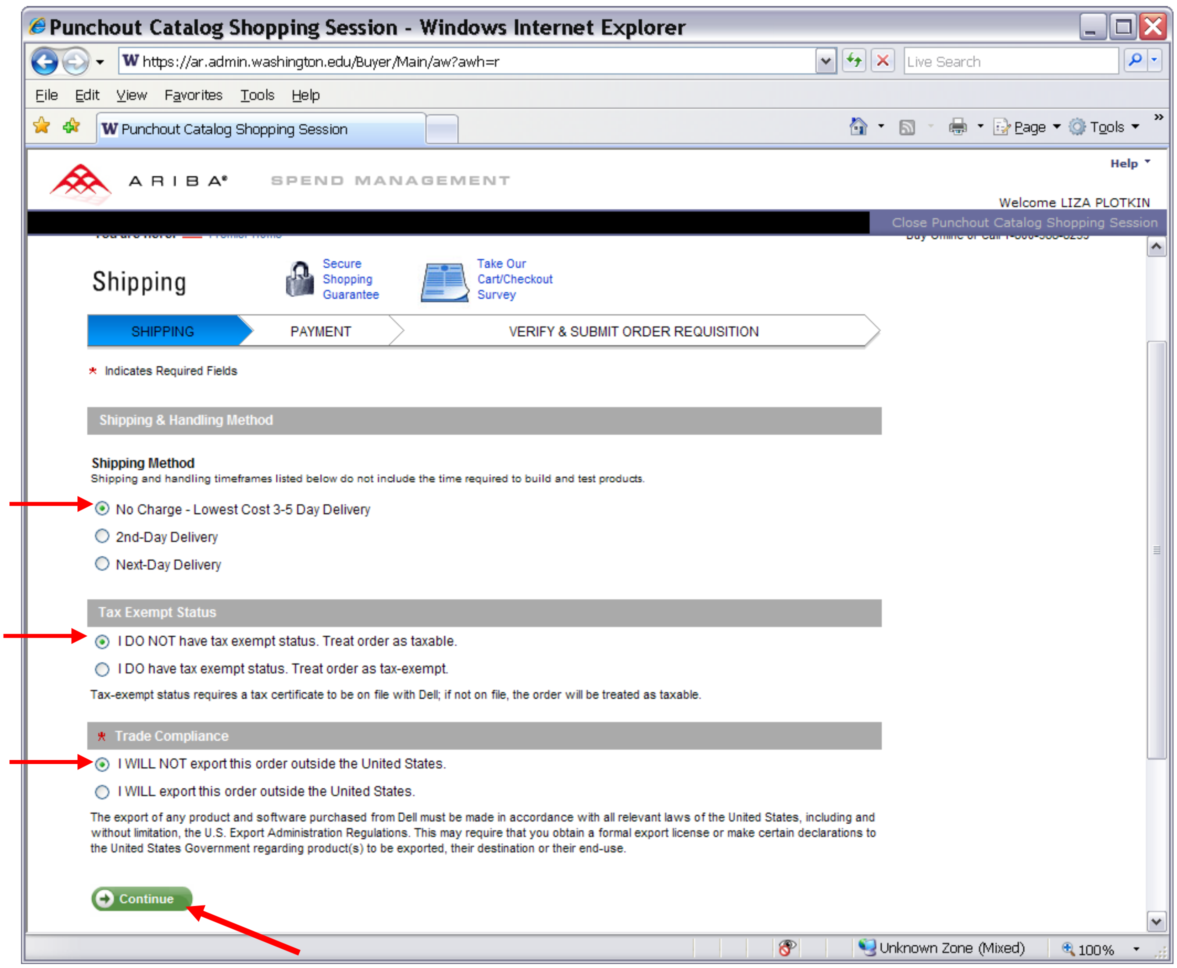
Change the **Quantity** of cables to “2”, then click on **Update Total**.
Click on **Remove item** if the item needs to be removed.
Click on **Create Order Requisition** button to proceed with order.



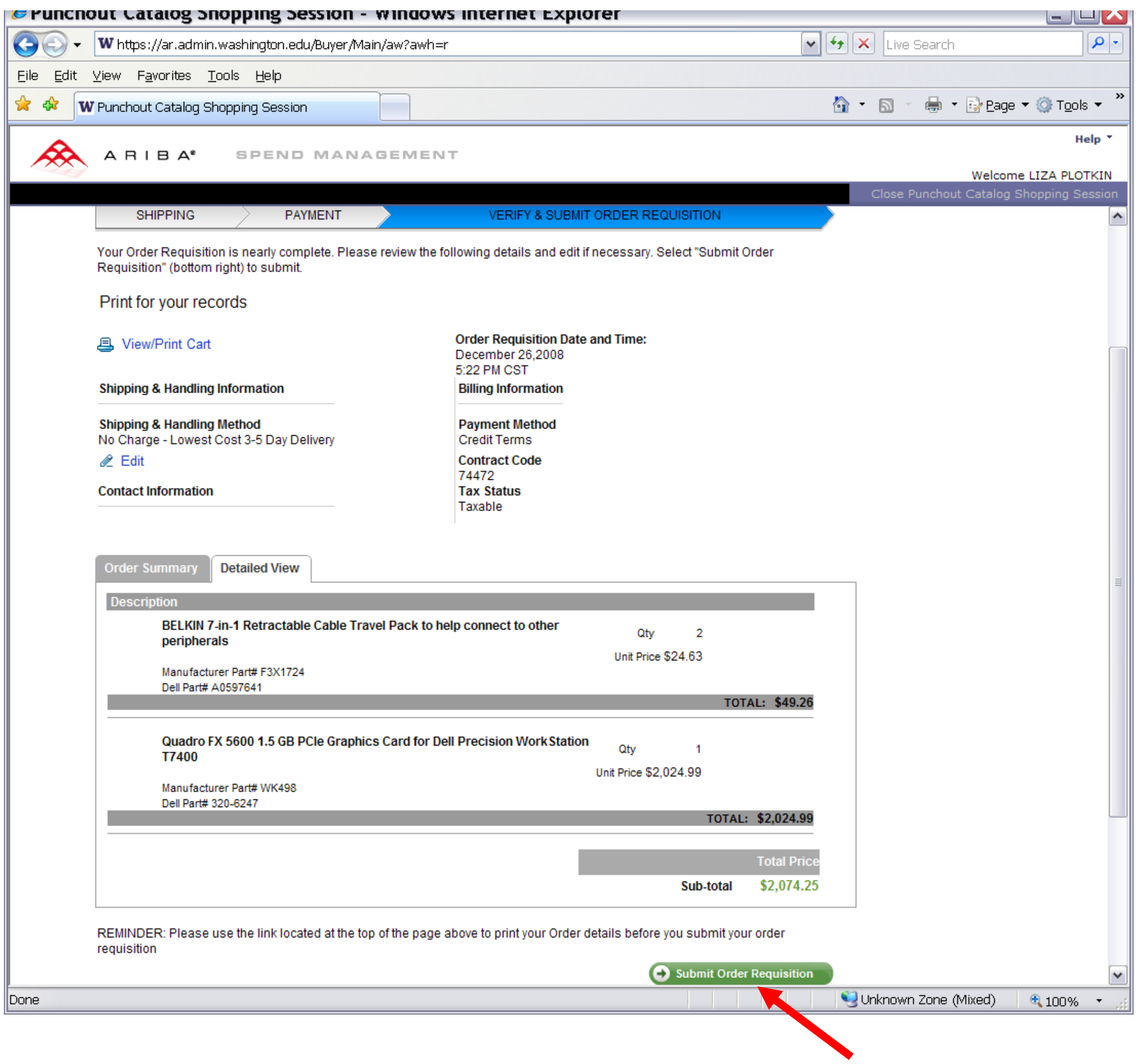
Choose all the needed **Shipping** Options.

Use **I DO Not Have tax exempt** status even if you **DO have** a tax exempt item. Tax exempt items are handled **within eProcurement**, not in the vendor’s punchout site.

Click on **Continue.**



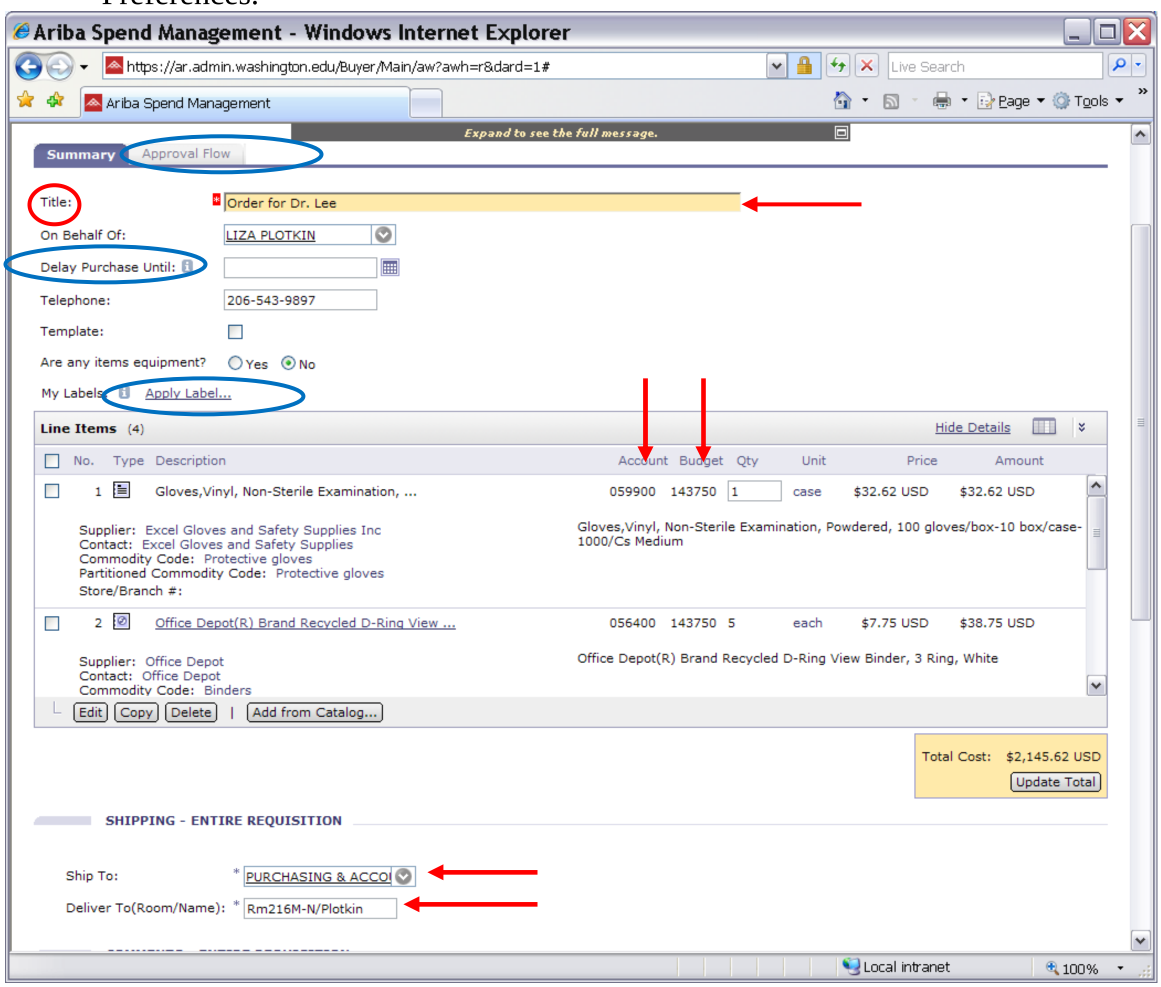
Verify all the items.
Click on **Submit Order Requisition** if everything looks right.



Summary Screen

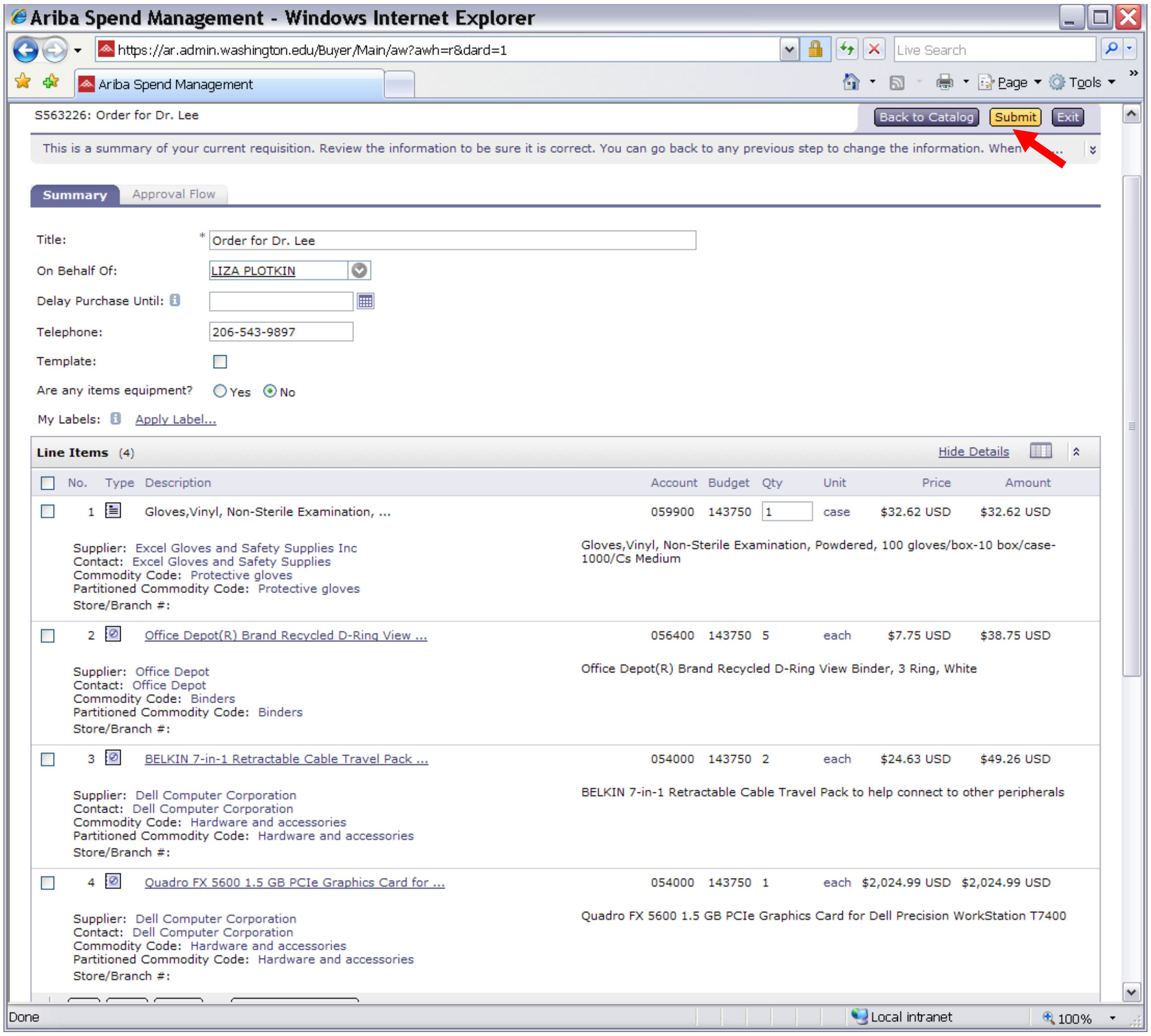
All the ordered items are now on the **Summary** screen.
You can do the following things on the **Summary** screen:

1. Click on the **Approval Flow** button to Check who is the Approver for your requisition (when you are not set up as a PreApproved Preparer or when you are using the limit which is higher than the one you are preapproved for)
2. Enter the **Title** for the requisition (**mandatory**)
3. Use the **Delay Purchase Until** feature only when you need to submit the order at a future date
4. Assign one or more **labels** to your orders in order to find them easily (optional)*
5. Choose the **budget** which is **different** than your Default budget either for the whole requisition or on a line by line basis. It's also possible to use **Split** budgets
6. Change the **Account code** if needed
7. Change **information** for the line which contains **equipment** if you have one. **M&E** exemption should be handled here when **editing** the equipment line.
8. Change the **Ship To** and **Deliver To** lines if different from your default in Preferences.



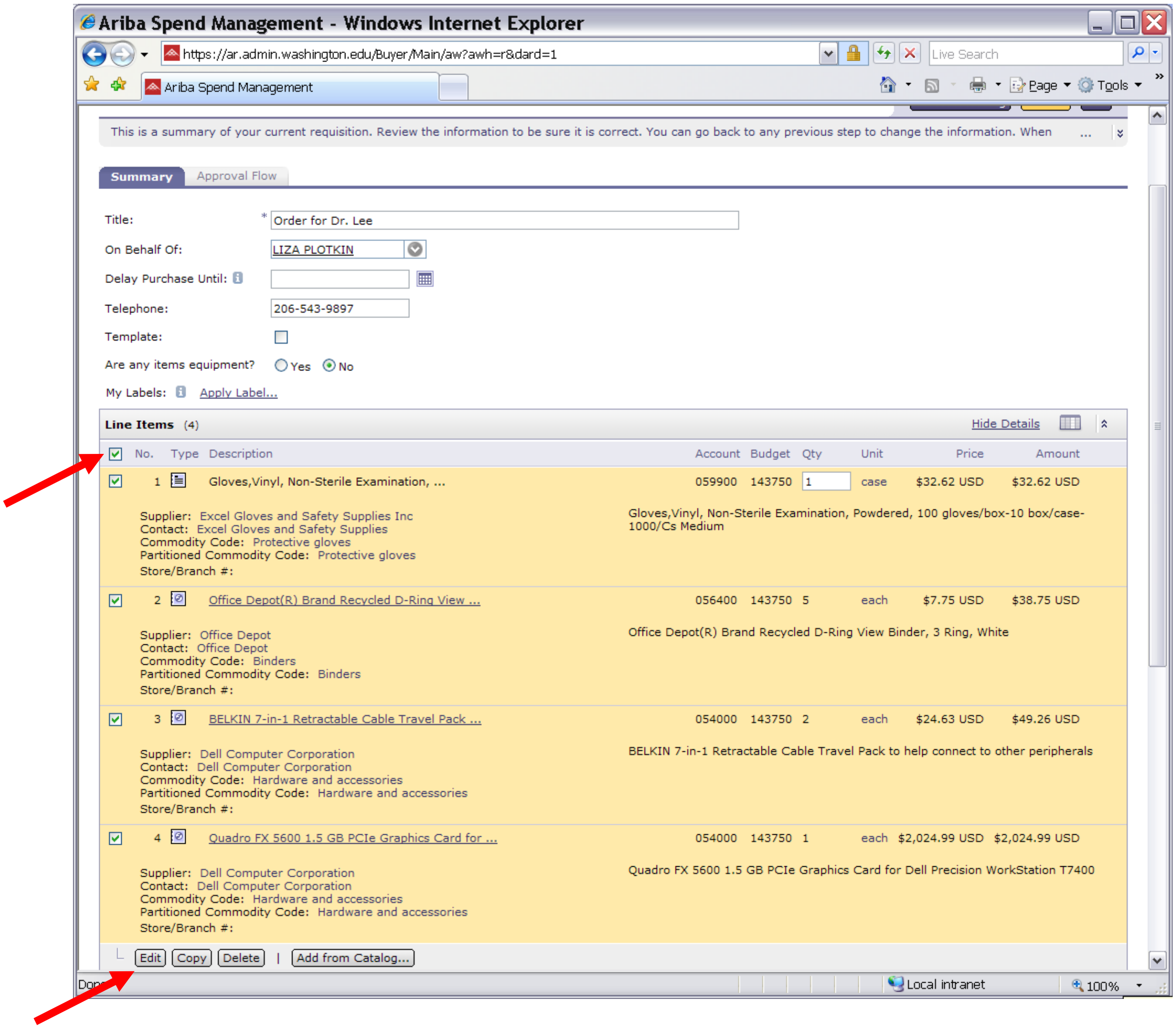
**Click on Document Labels for label instruction on the following web site:*
http://www.washington.edu/admin/stores/eprocurement/documentation/documentation.html

If **no changes** are necessary, just click on the **Submit** button in the upper right corner or in the bottom right corner of the screen.



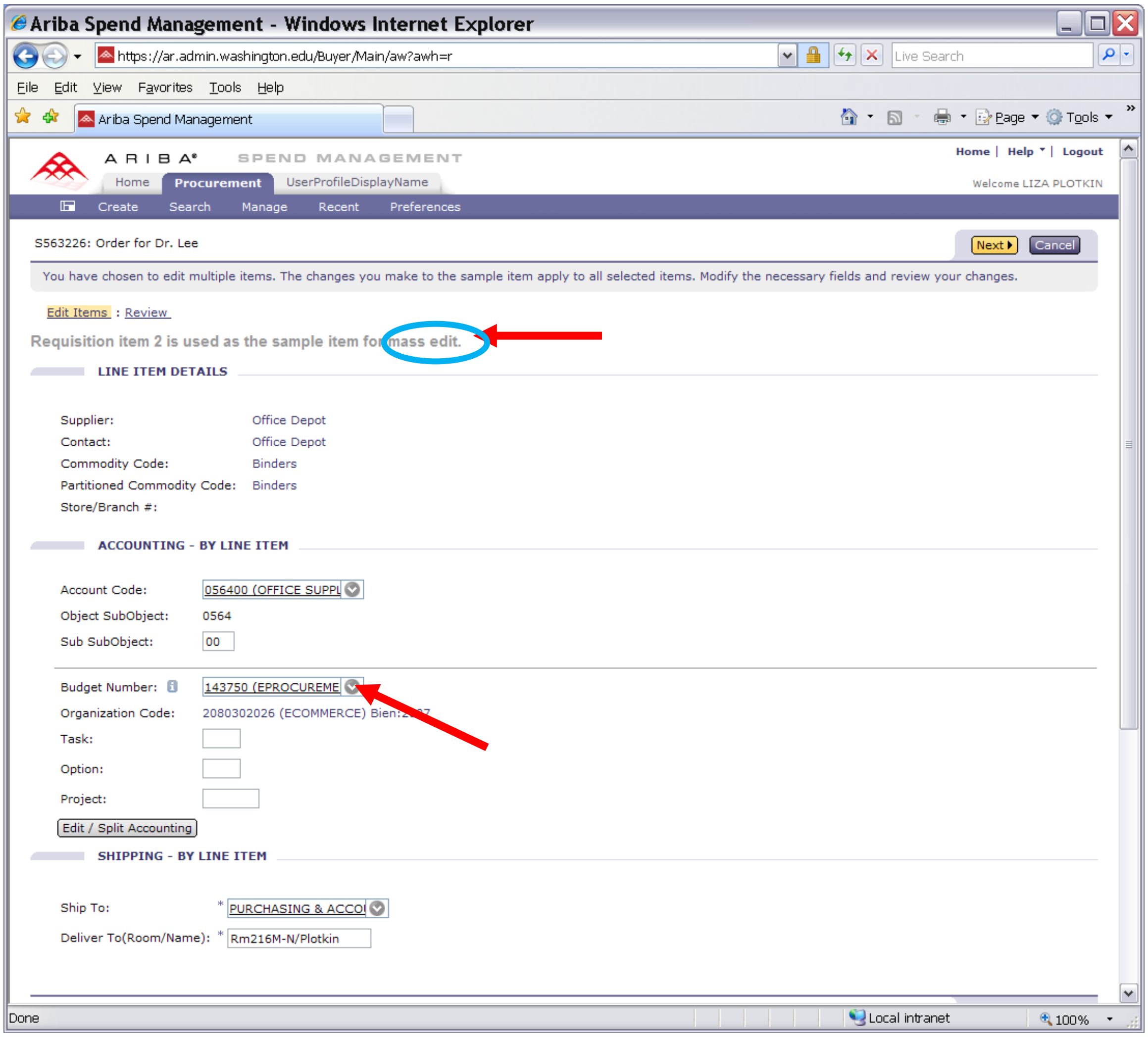
To Edit all the items (mass change):

Check the **Box** to the left of **No.** above the first item.
All the items will be **check marked**.
Click on **Edit** below the very last item.

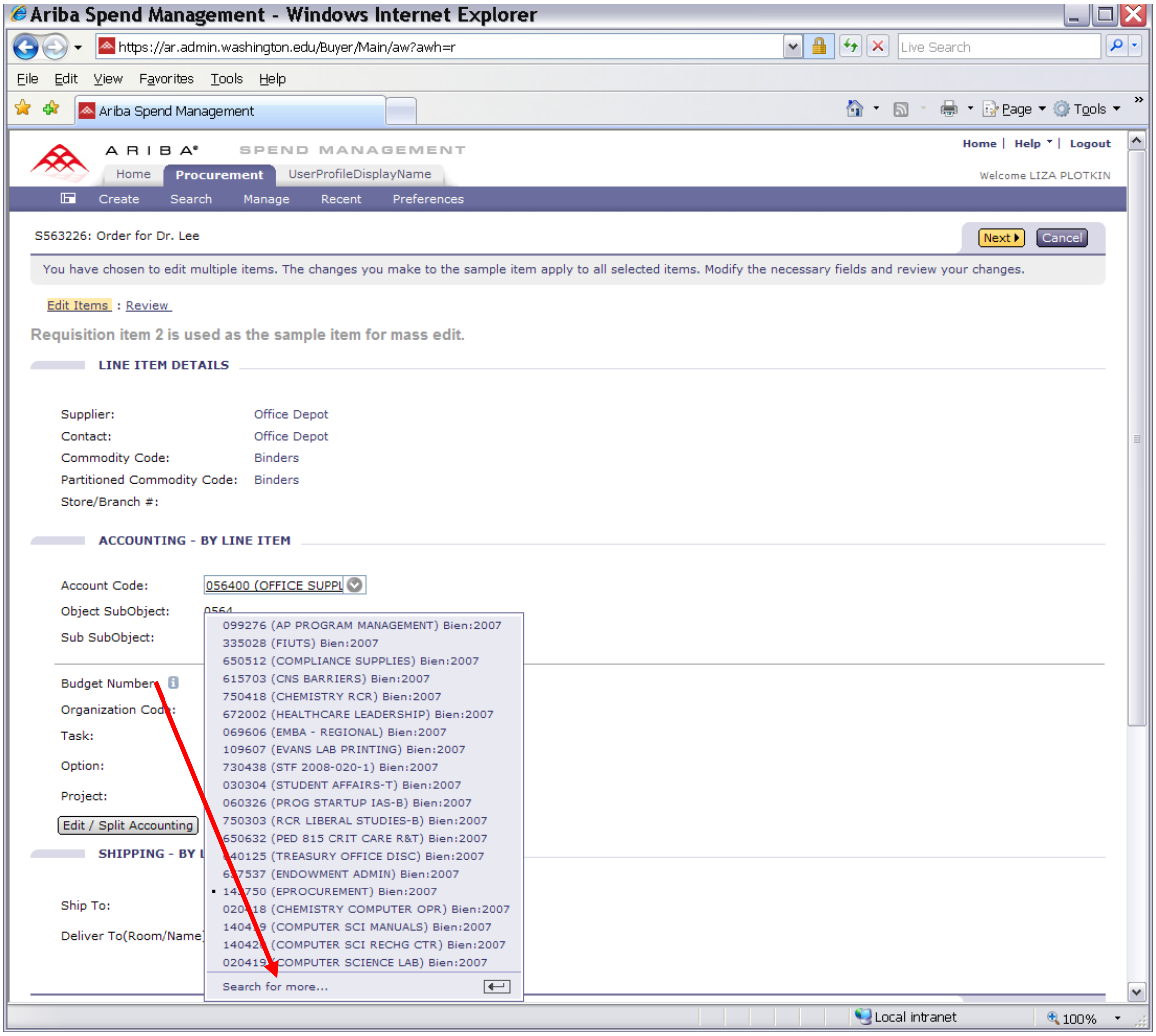


To Change Budget for the whole requisition:

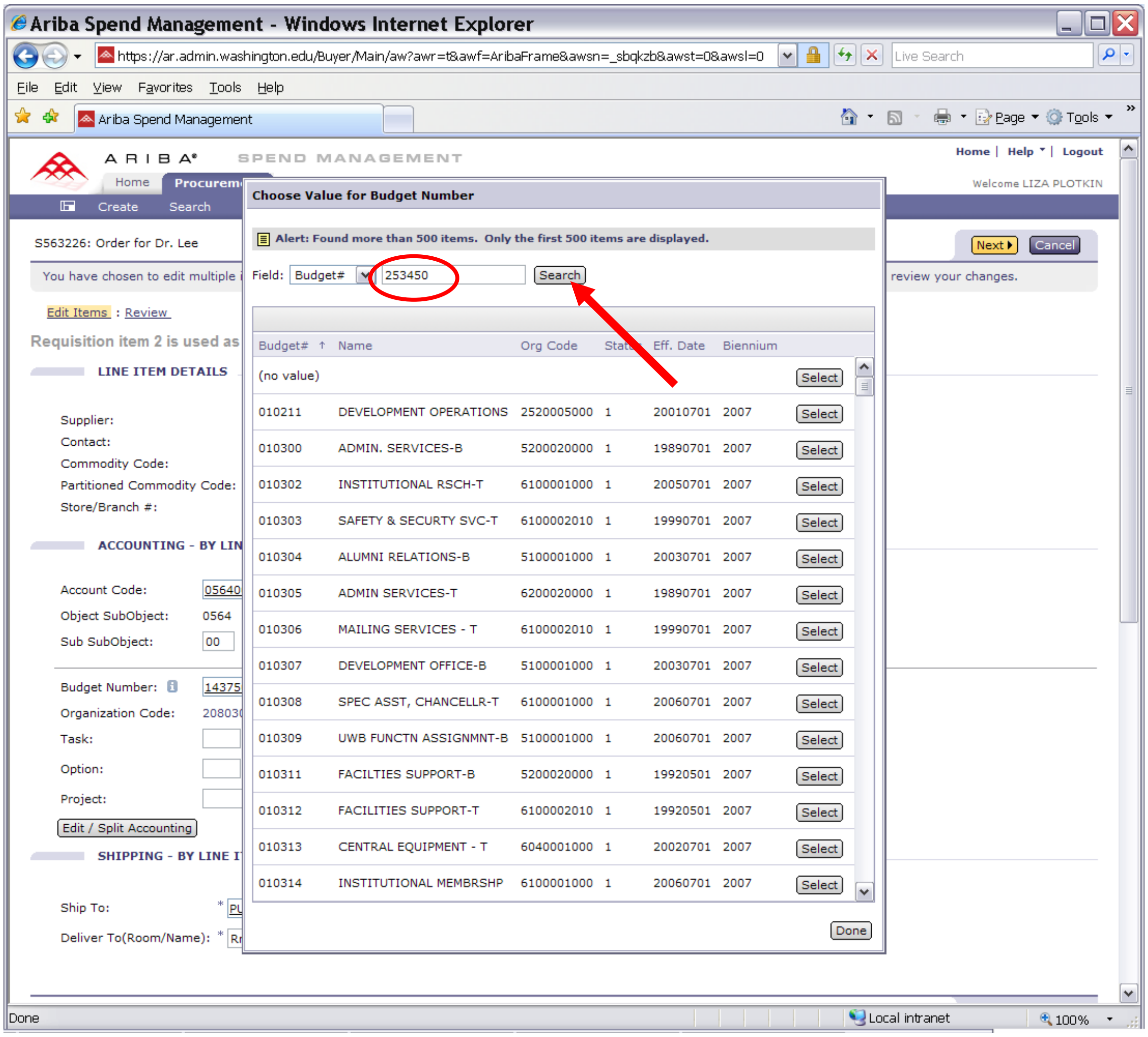
Make sure you see the line with the word "**mass edit**" in it on the Edit Items screen.
Scroll down until you see the **Budget Number** line.
Click on the **Down Arrow**.



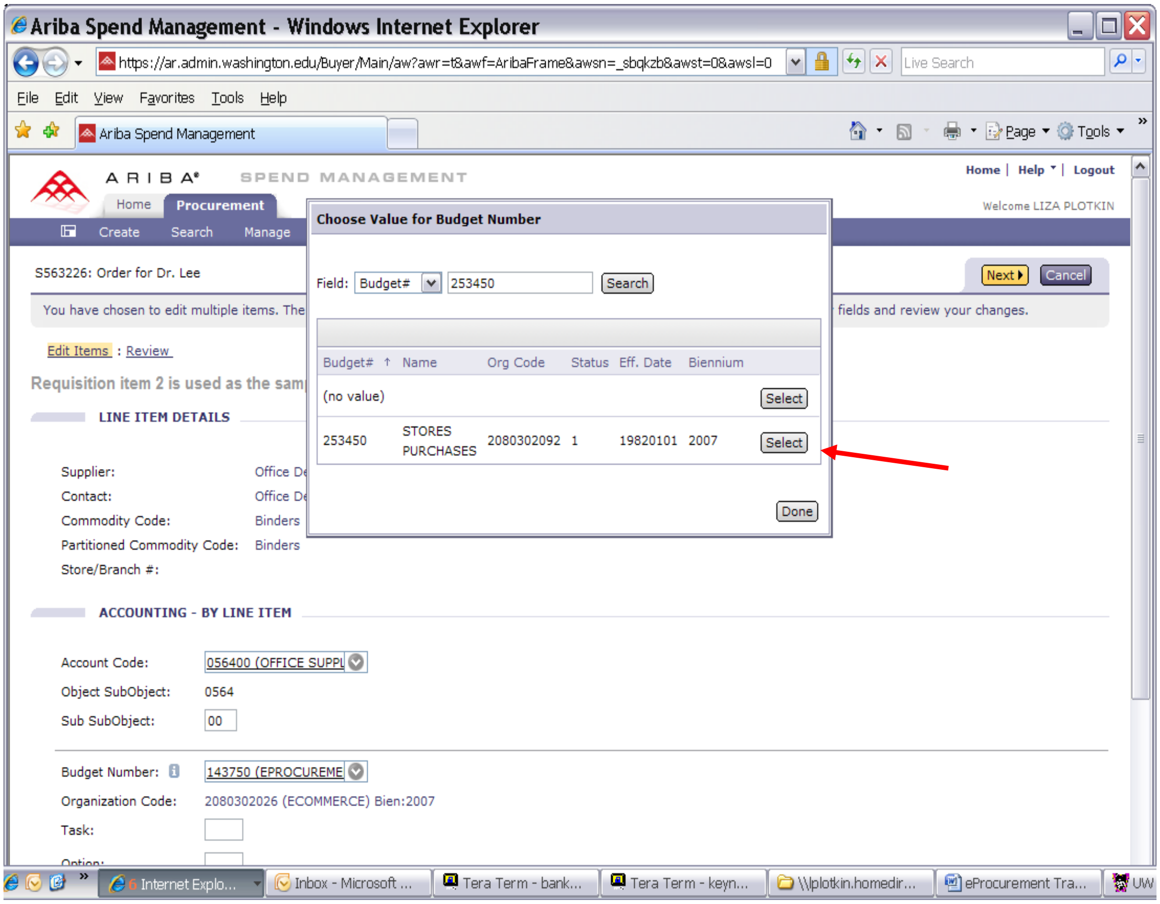
Click on **Search for more…** if you don't see the budget on the Pull Down list.



Type the budget number with **No Dash**.
Click on **Search.**



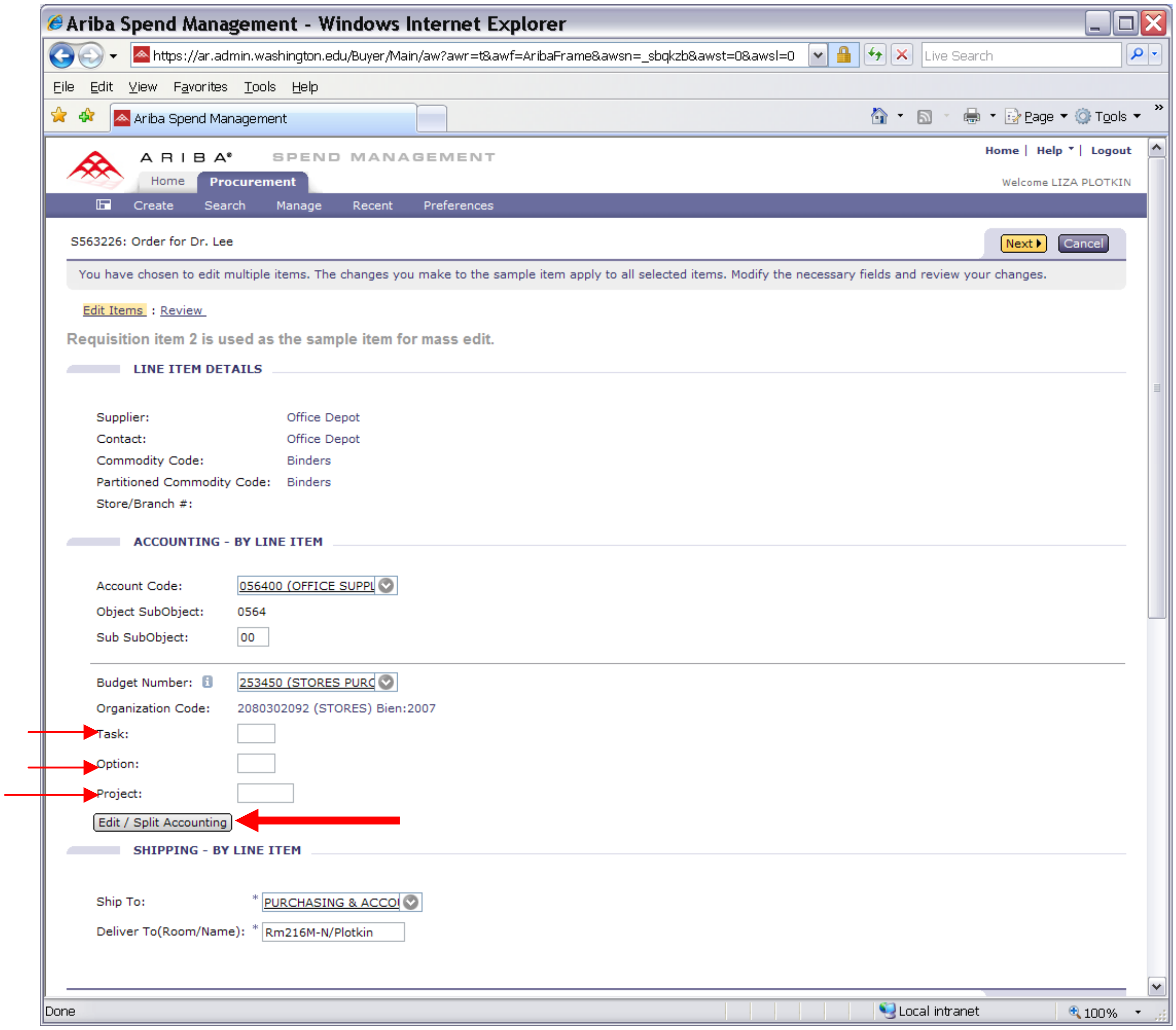
Click on **Select** to choose the budget.



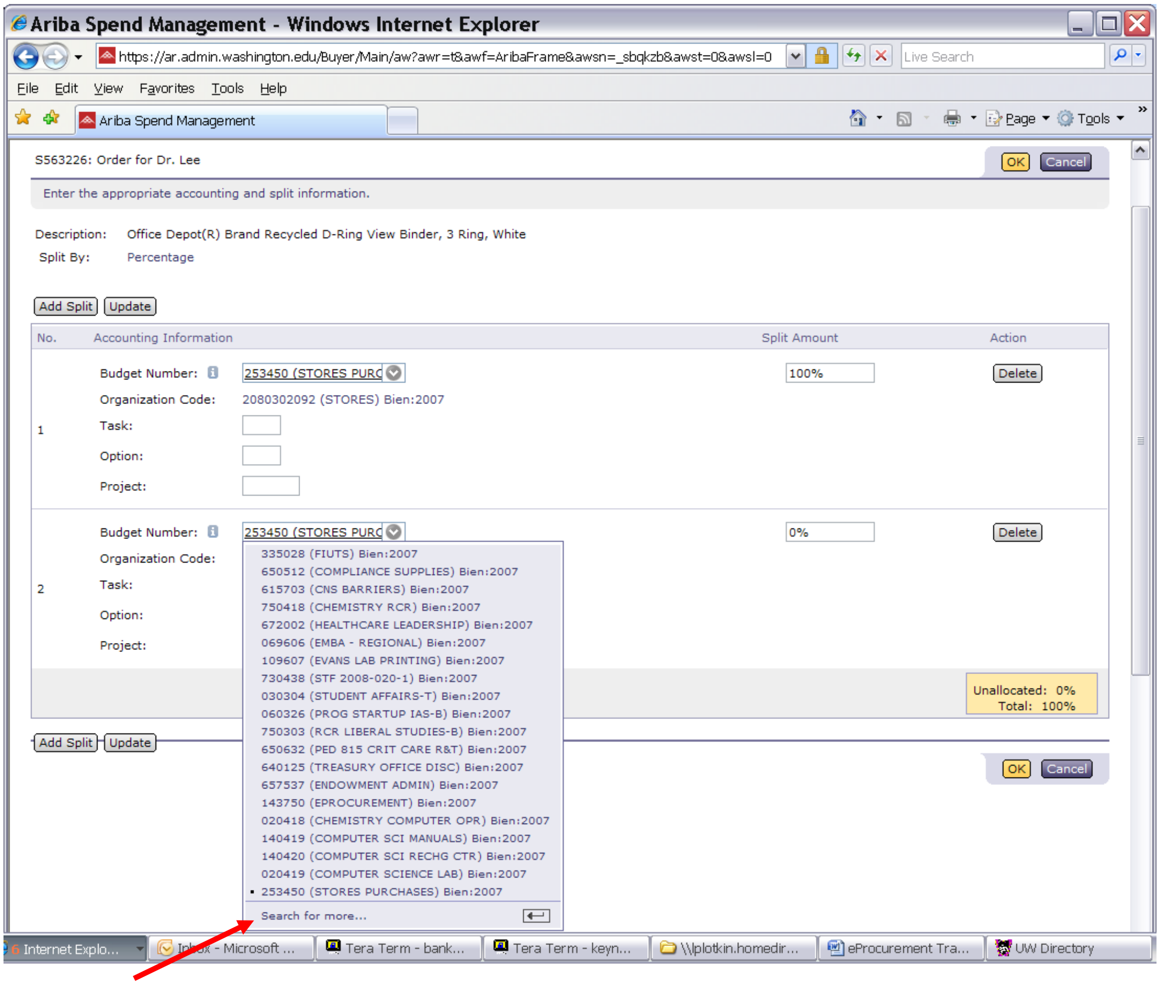
Newly selected budget number will show up on the Edit **Items** screen.
On this screen you can add the **Task**, **Option**, and **Project** codes if needed.

To split budgets:

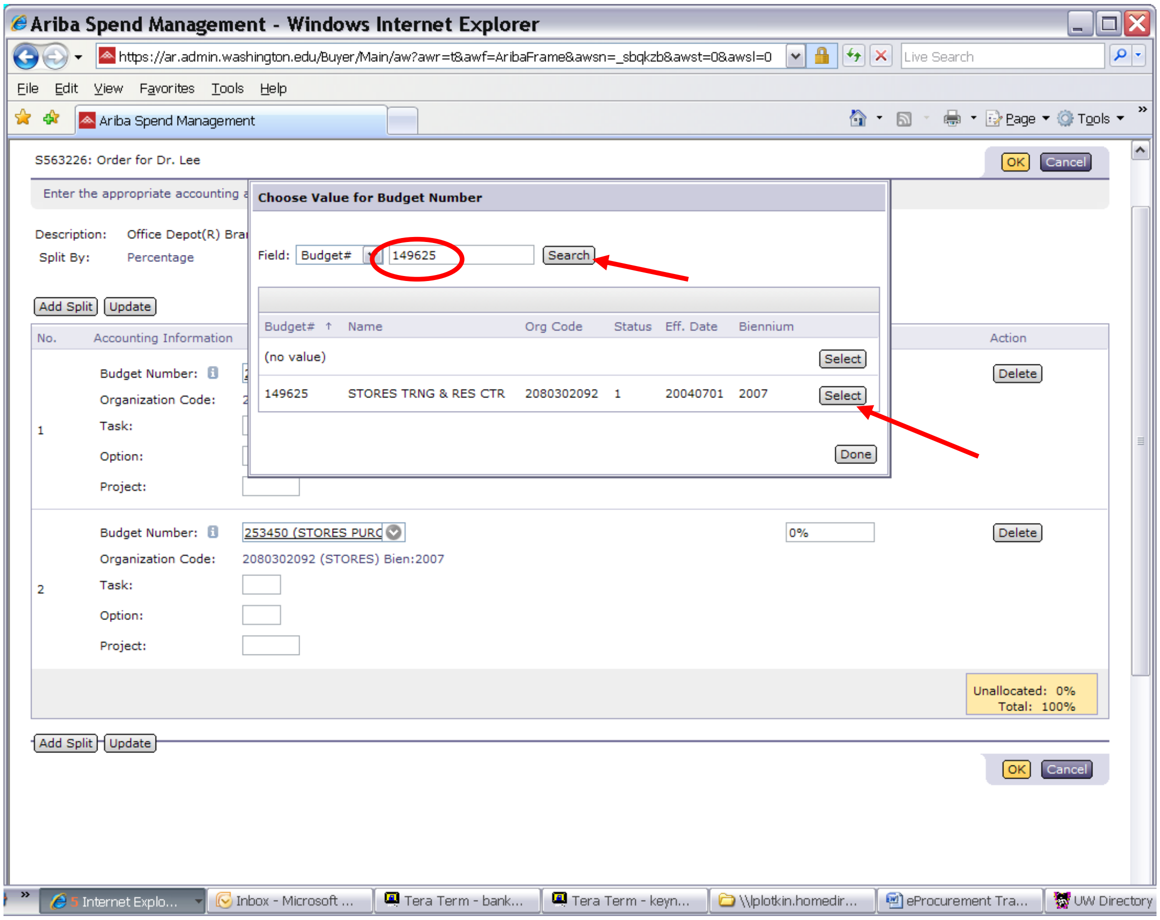
Click on **Split Accounting**



Click on **Search for more…** if you don't see the budget you need on the Pull Down list.

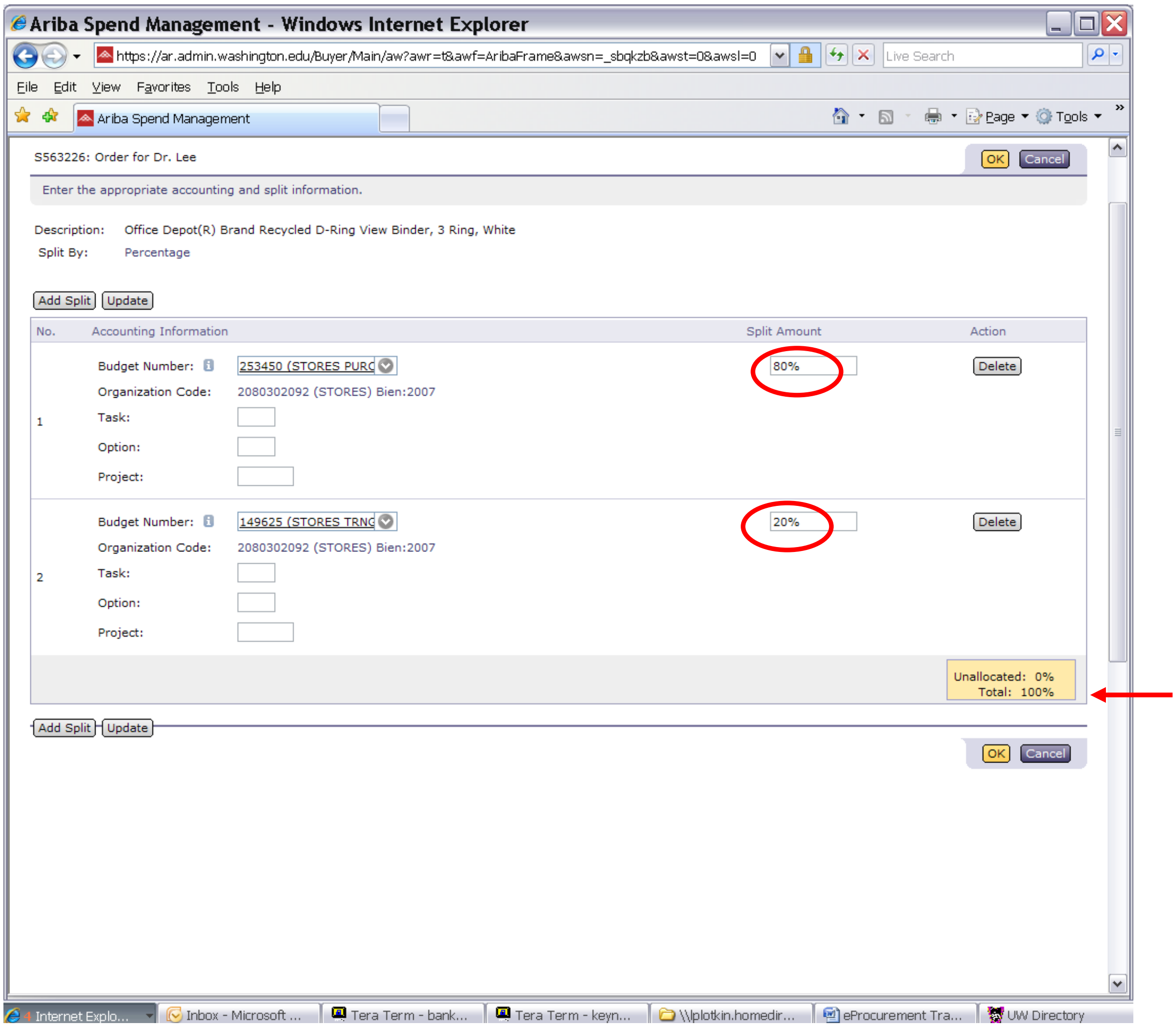


Type the **budget number** you split this order with.
Click on **Search.**
Click on **Select.**



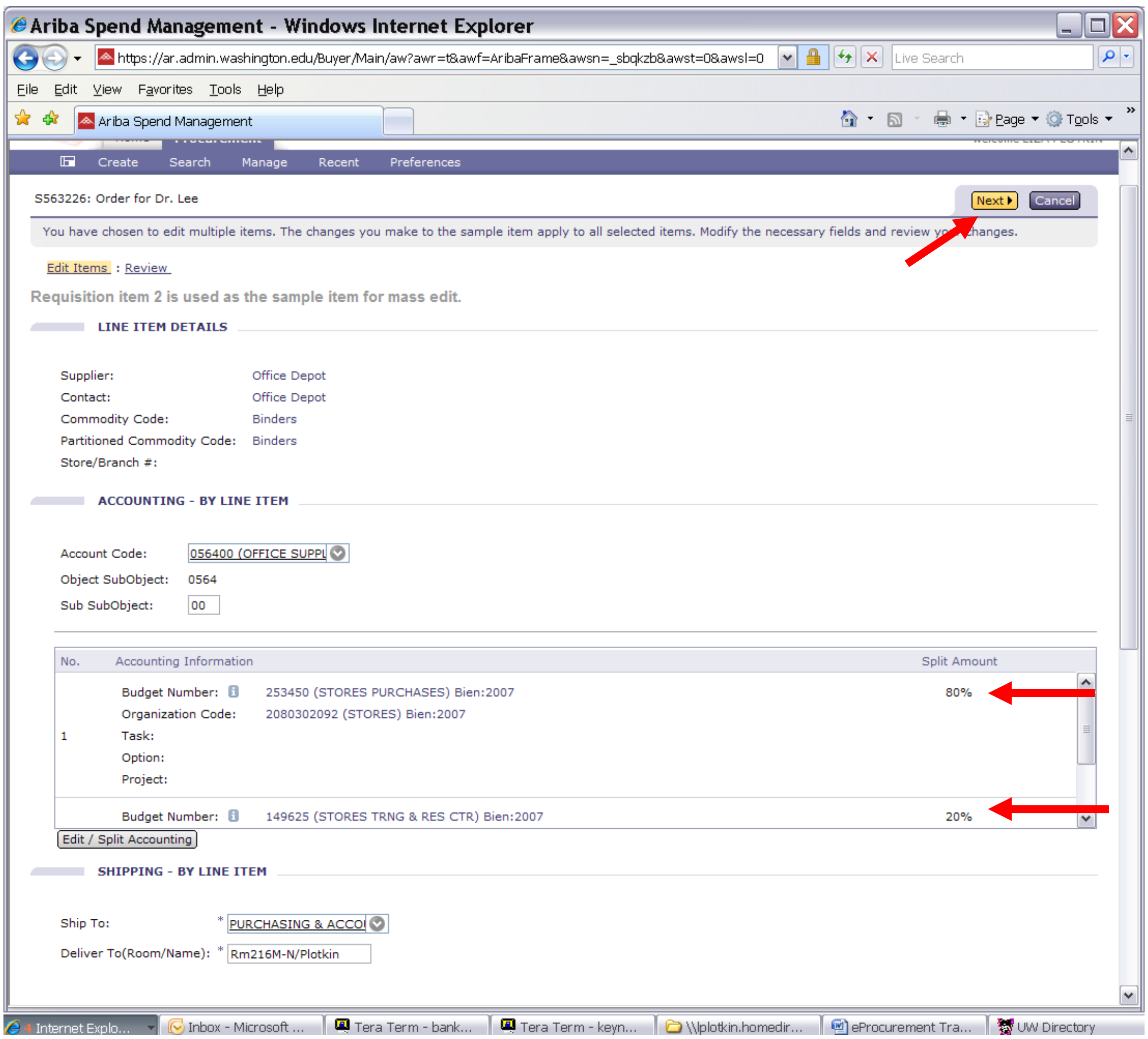
Click on **Add Split** again if another split budget should be added, otherwise **Add** the **Split Percentage** amount for each line. It should be a **round number** totaling to **100%** for all the line items (example 80% & 20% or 60% & 40% - **no decimal points allowed**). Click on **OK** which will take you back to the **Edit** screen.

Note: In **Mass Edit** split can be done **only** by **Percentage**. In **Line-by-Line Edit** split can be done by **Amount** and by **Quantity** in addition to split by **Percentage**.



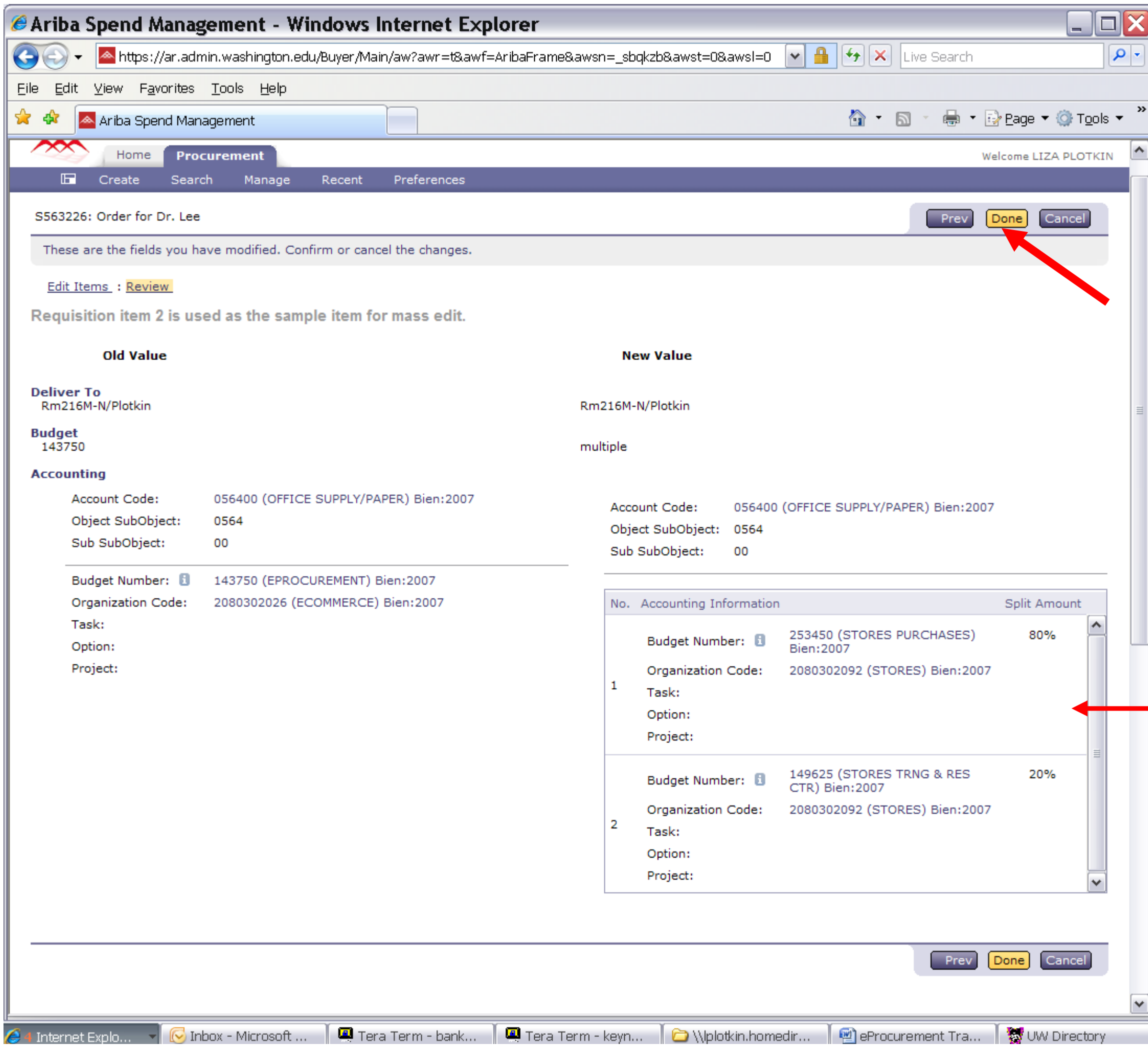
You should see the changes made.

Click on **Next.**



This screen shows the **Old Value** and **New Value**.

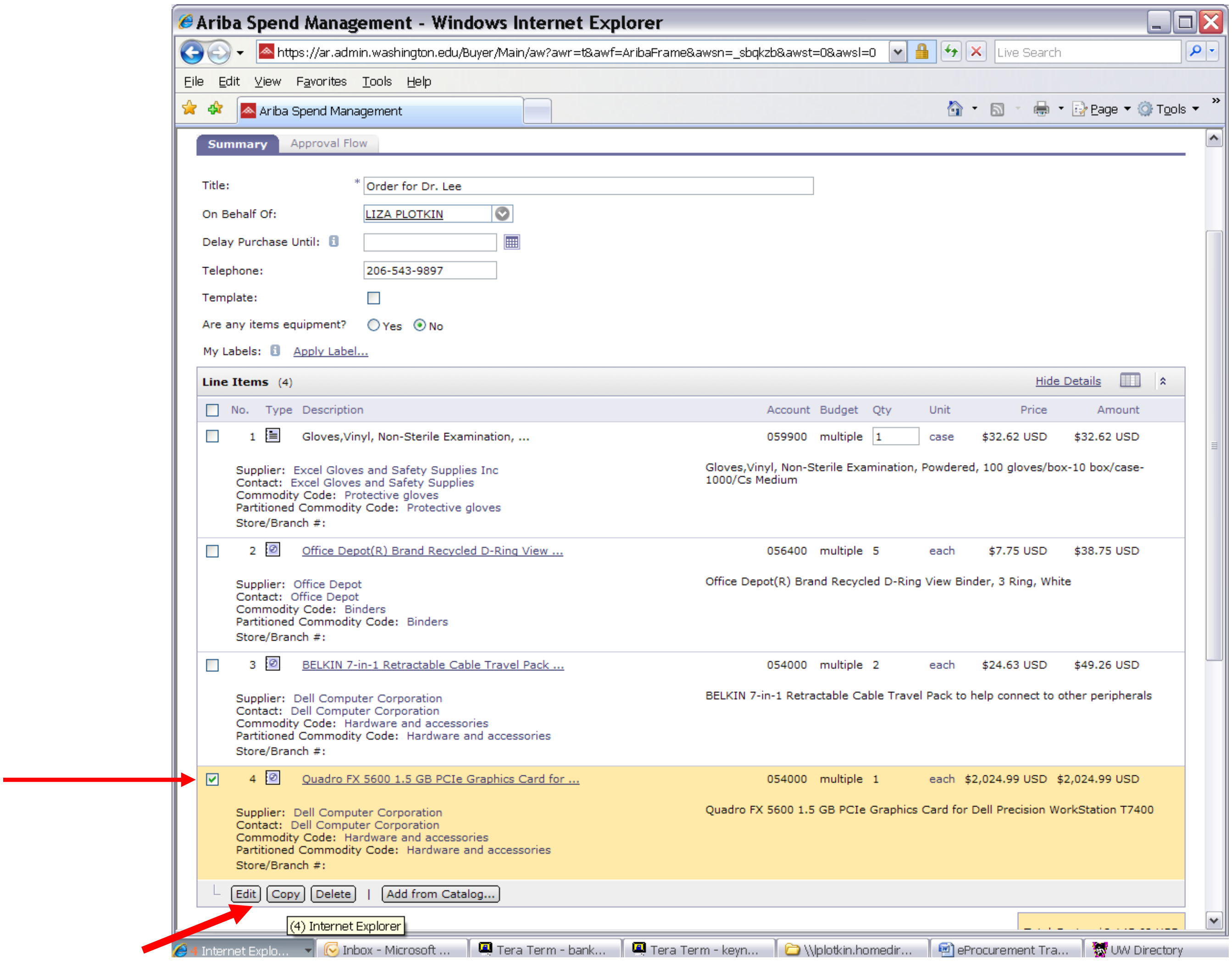
Click on **Done** if everything looks right.



Ordering Equipment:

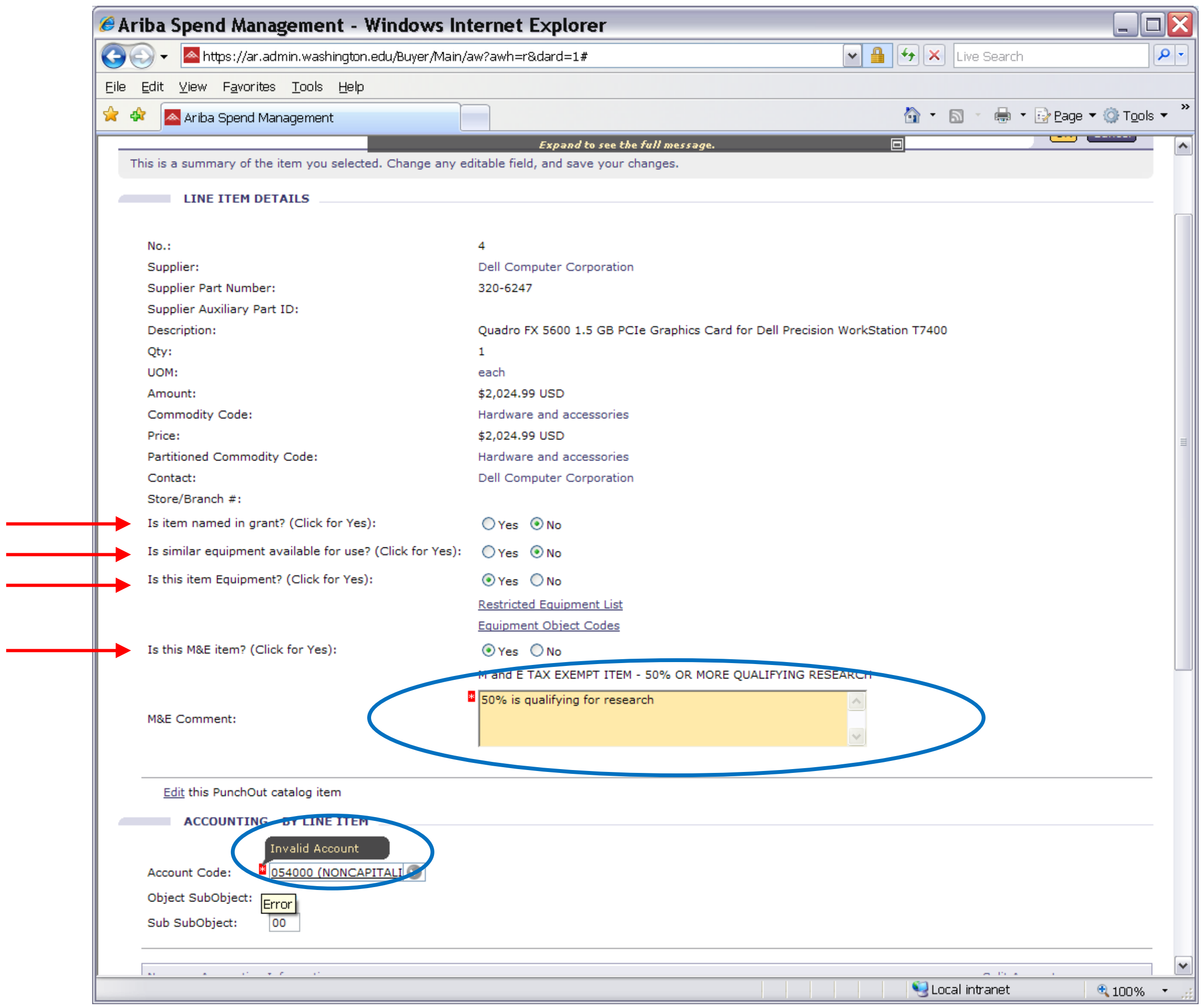
Click on the **Box** to the left of the line which contains equipment.
Click on **Edit** below the last line.

Note: You have to individually change each line with equipment; mass edit is not allowed in equipment setup.

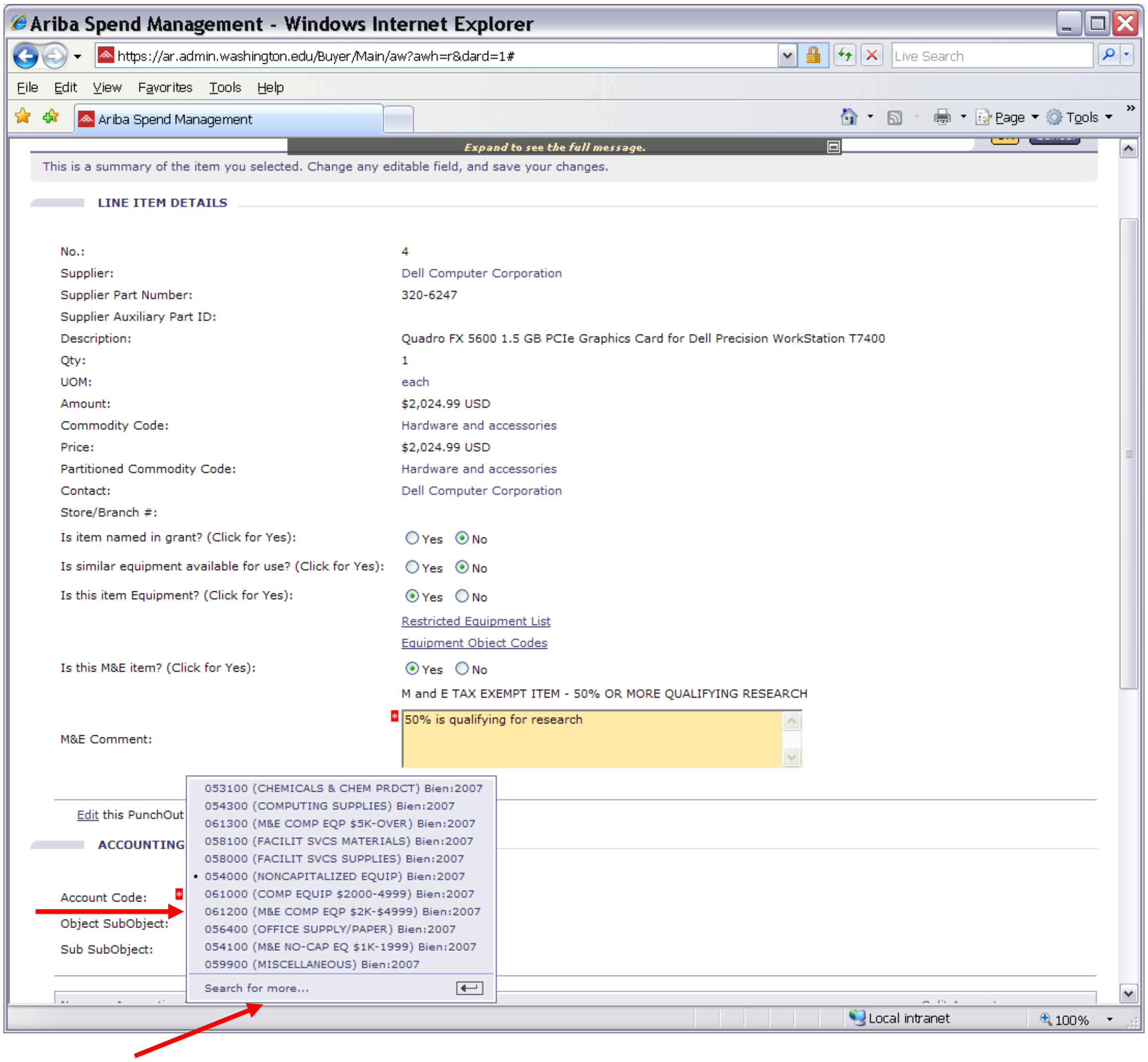


Answer questions regarding equipment:
Is item named in grant? (Check for Yes) – Yes (in our case)
Is similar equipment available for use? (Check for Yes) – No (in our case)
Is this item equipment? – **Yes** has to be marked.
Is this M&E item? (Check for Yes) – Yes (in our case).
M&E Comment: **Always enter the comment**.

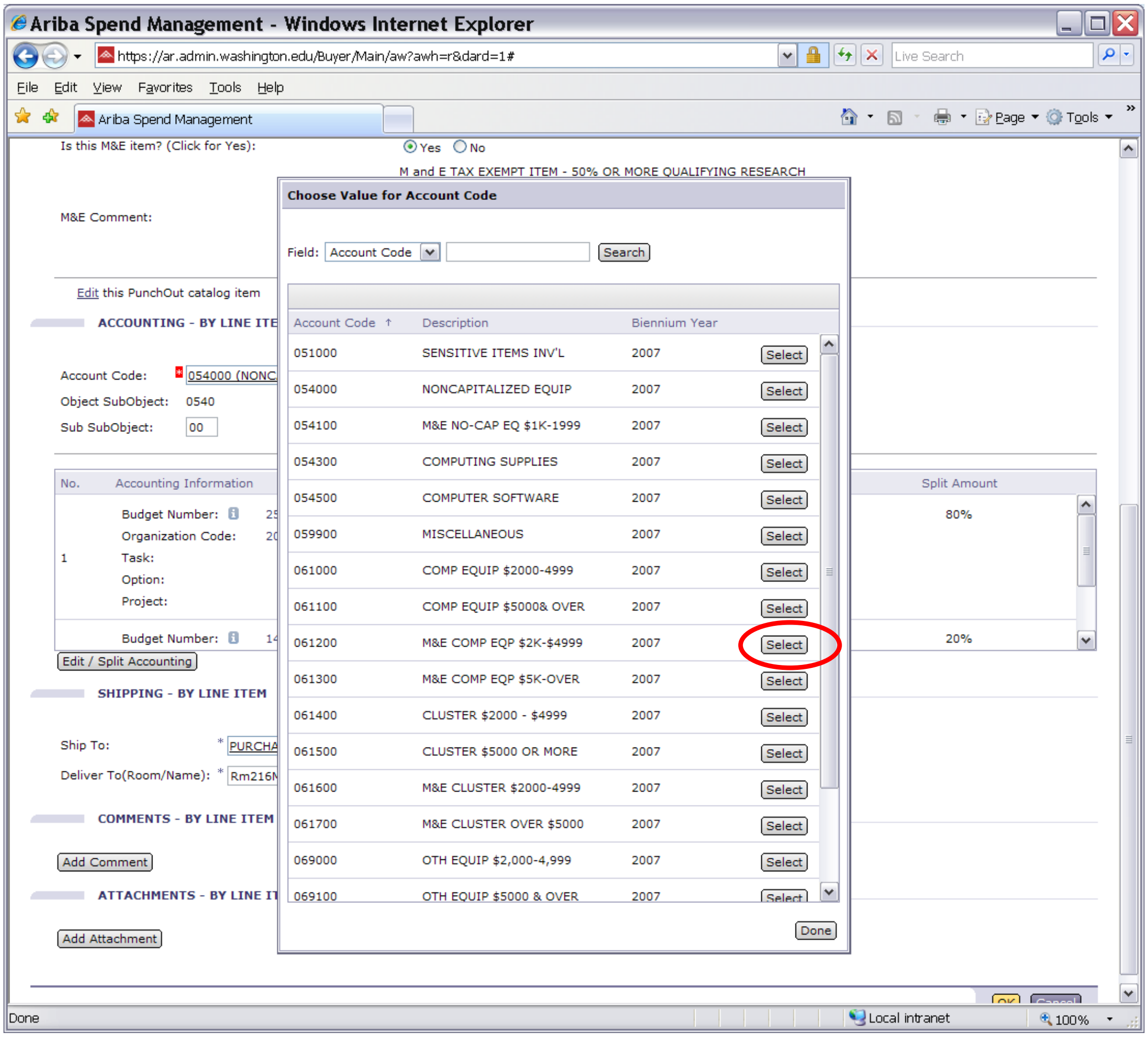
On the Account Code Line you will see the code which the system has chosen automatically before the above changes were made. You will see the error message "**Invalid Account**".
Click on **the Down Arrow** in the Account Code field to choose the correct Account Code.



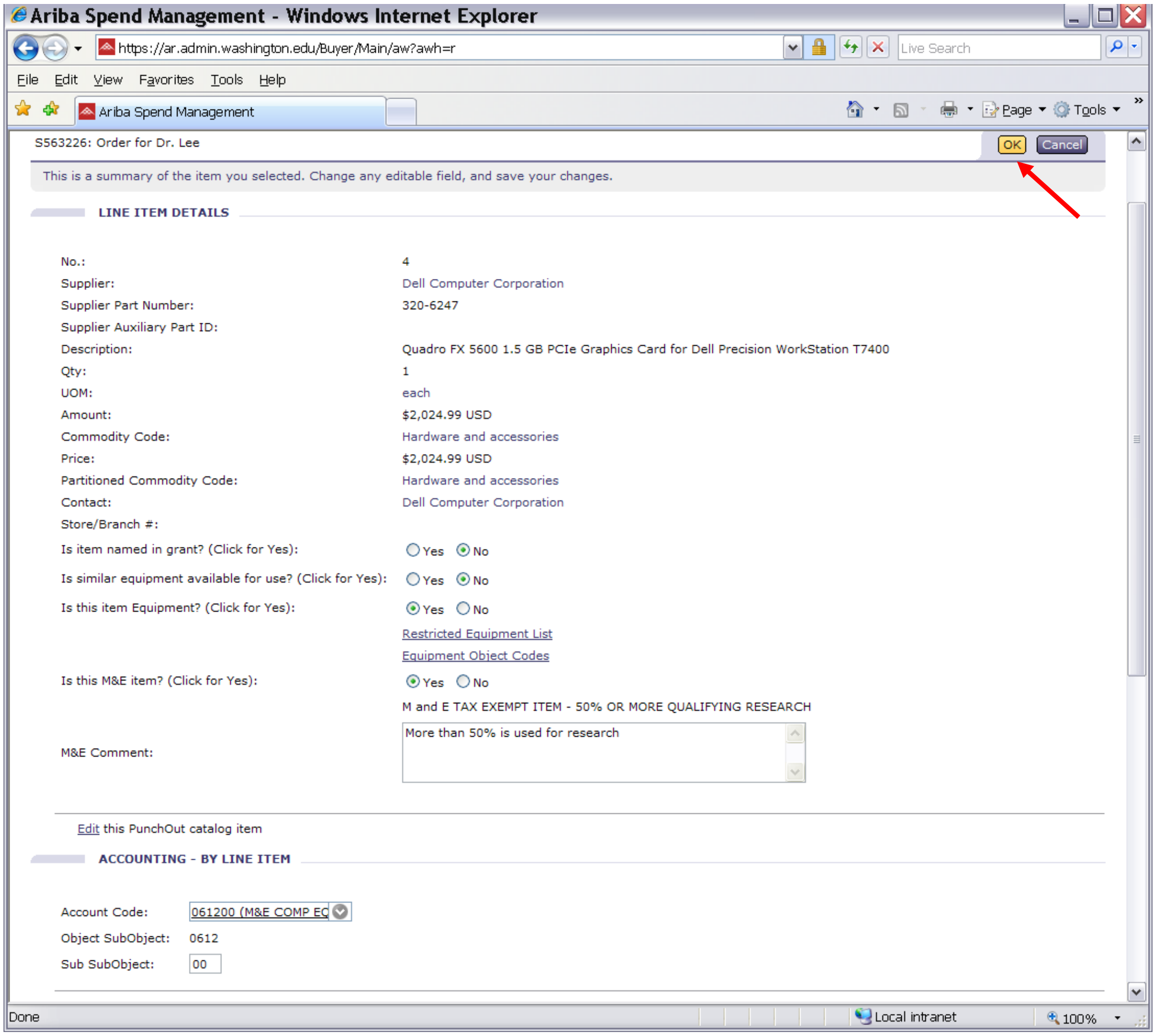
Select the right Account Code from the Drop Down list if it's there.
Click on **Search for more…** if the right Account Code is not on the Drop Down list.



Select the right Account Code for the M&E computer equipment between $2,000 and $4,999.

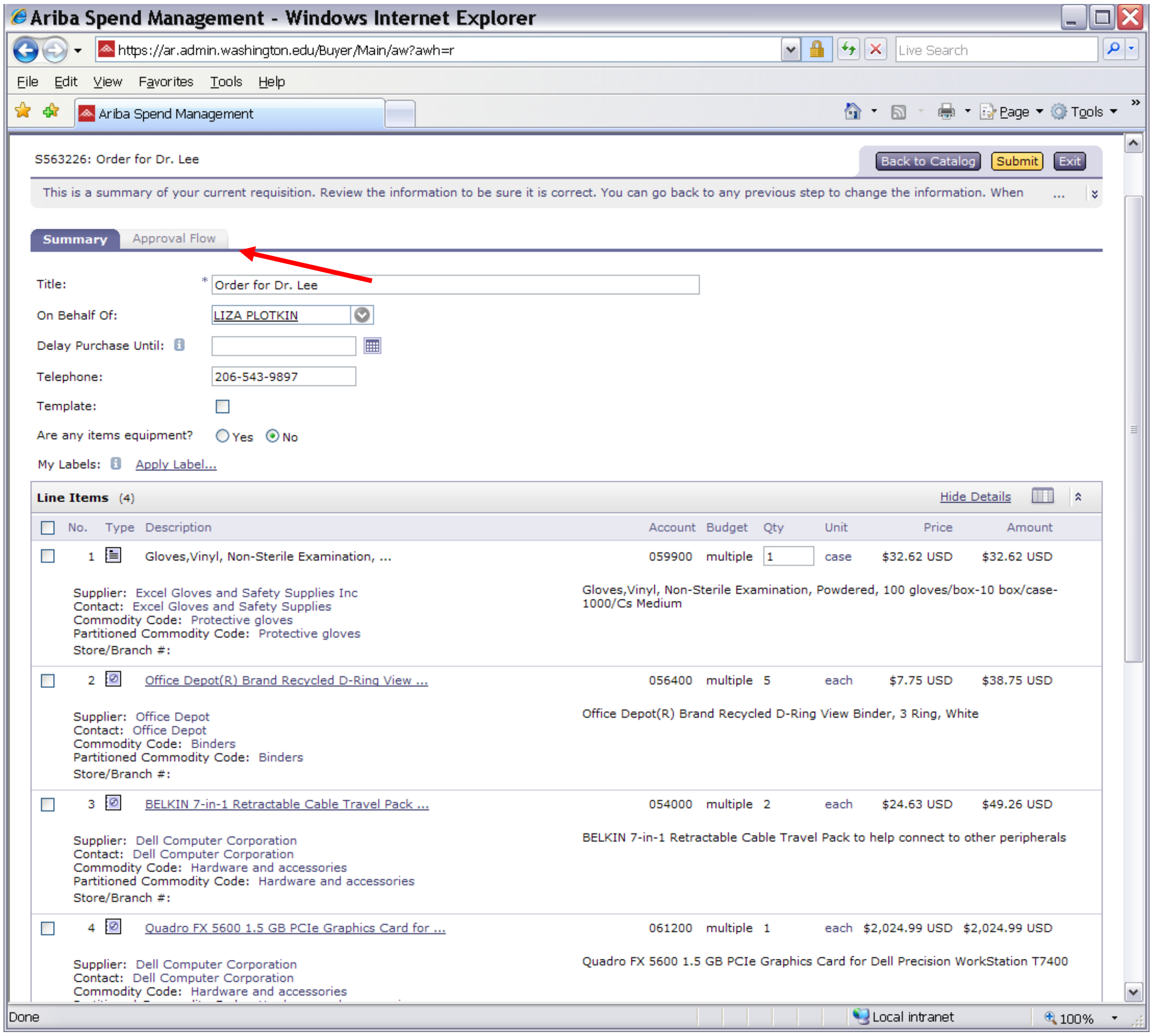


Click on **OK** if everything looks right.

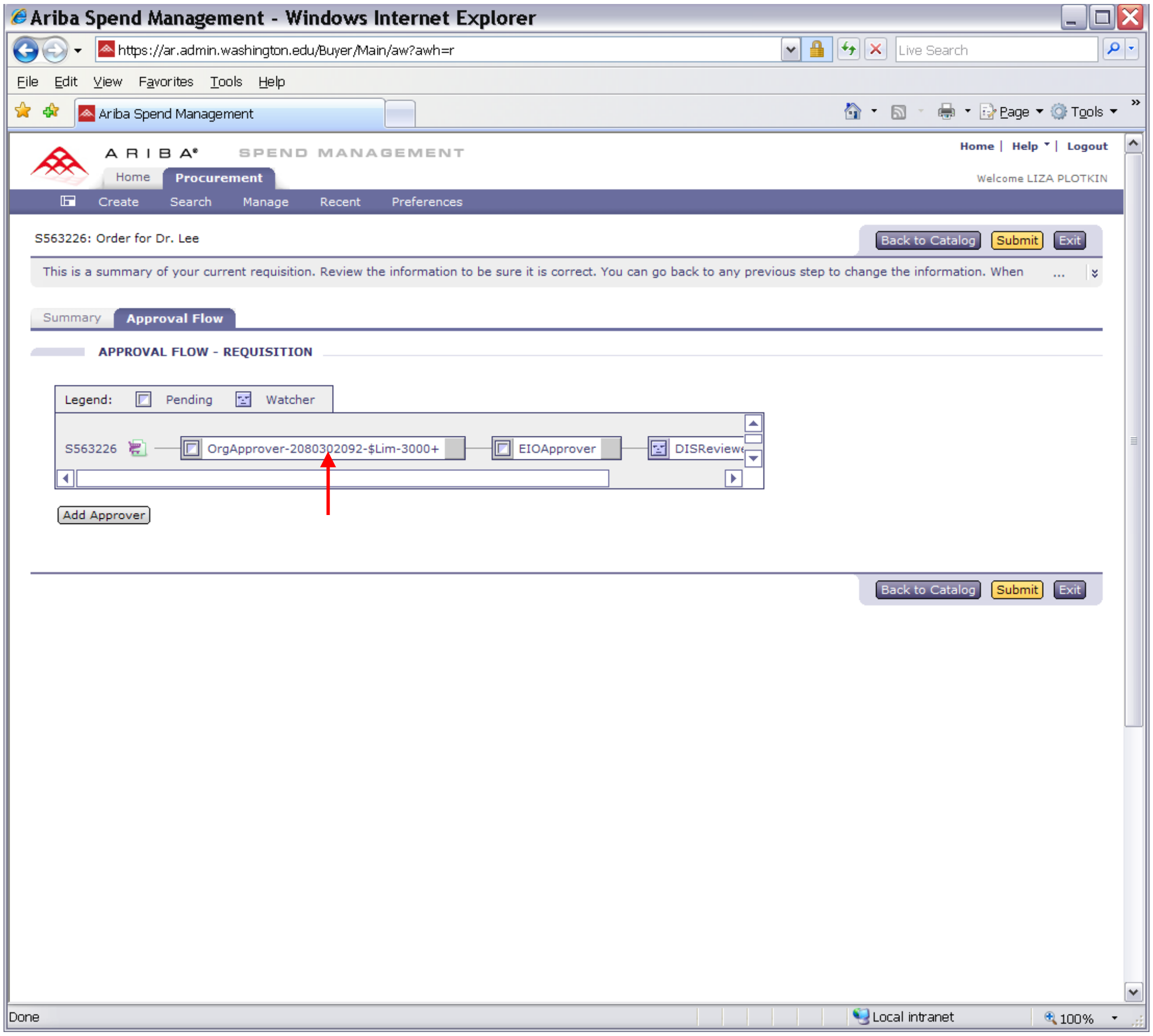


Checking Approval Flow:

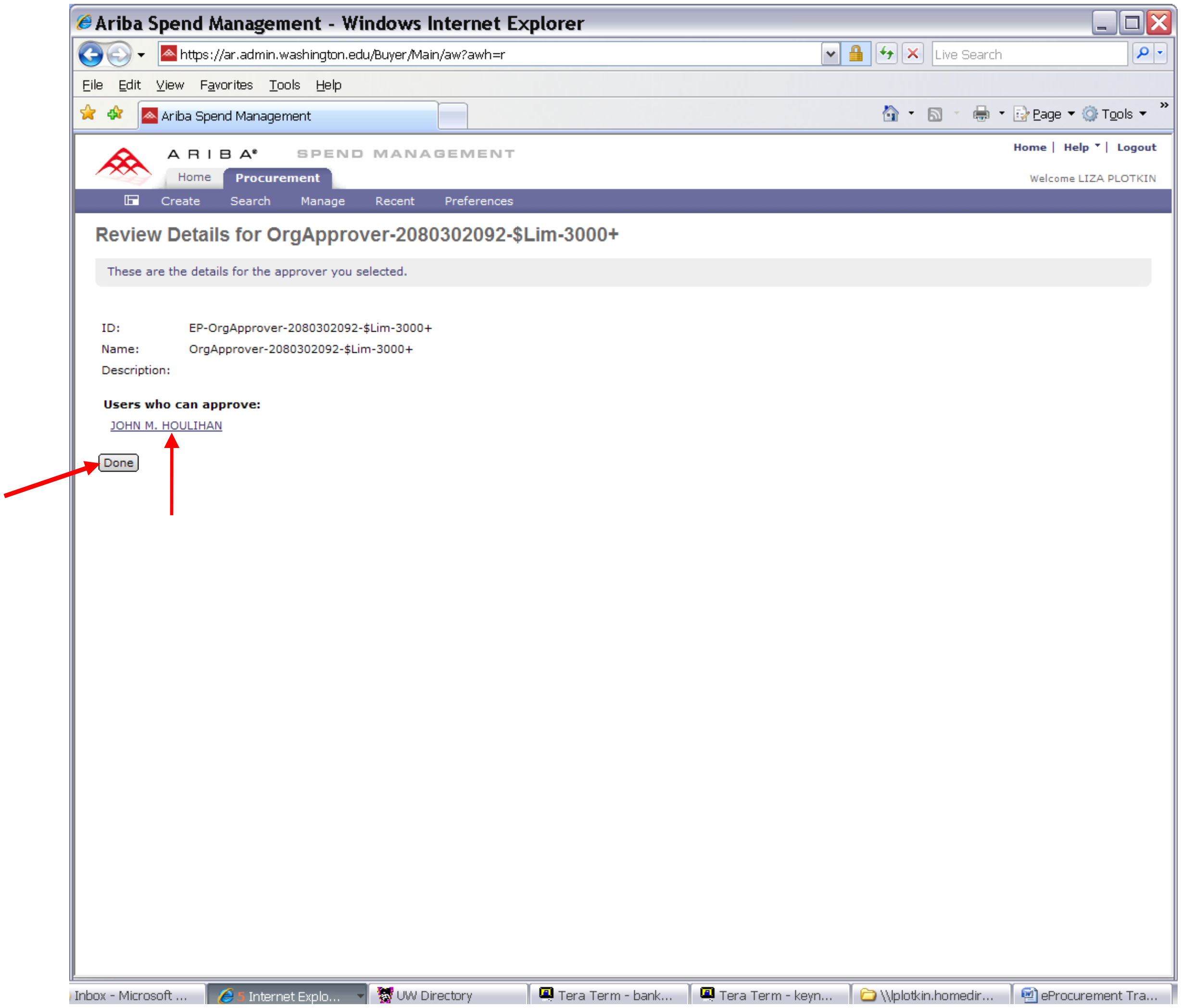
Click on the **Approval Flow** tab to see who is the Approver for the requisition.



Click on the link for the **OrgApprover.**



Click on the **Approver Name** under **Users Who Can Approve** to find the e-mail address of the Approver if needed or click on **Done**.



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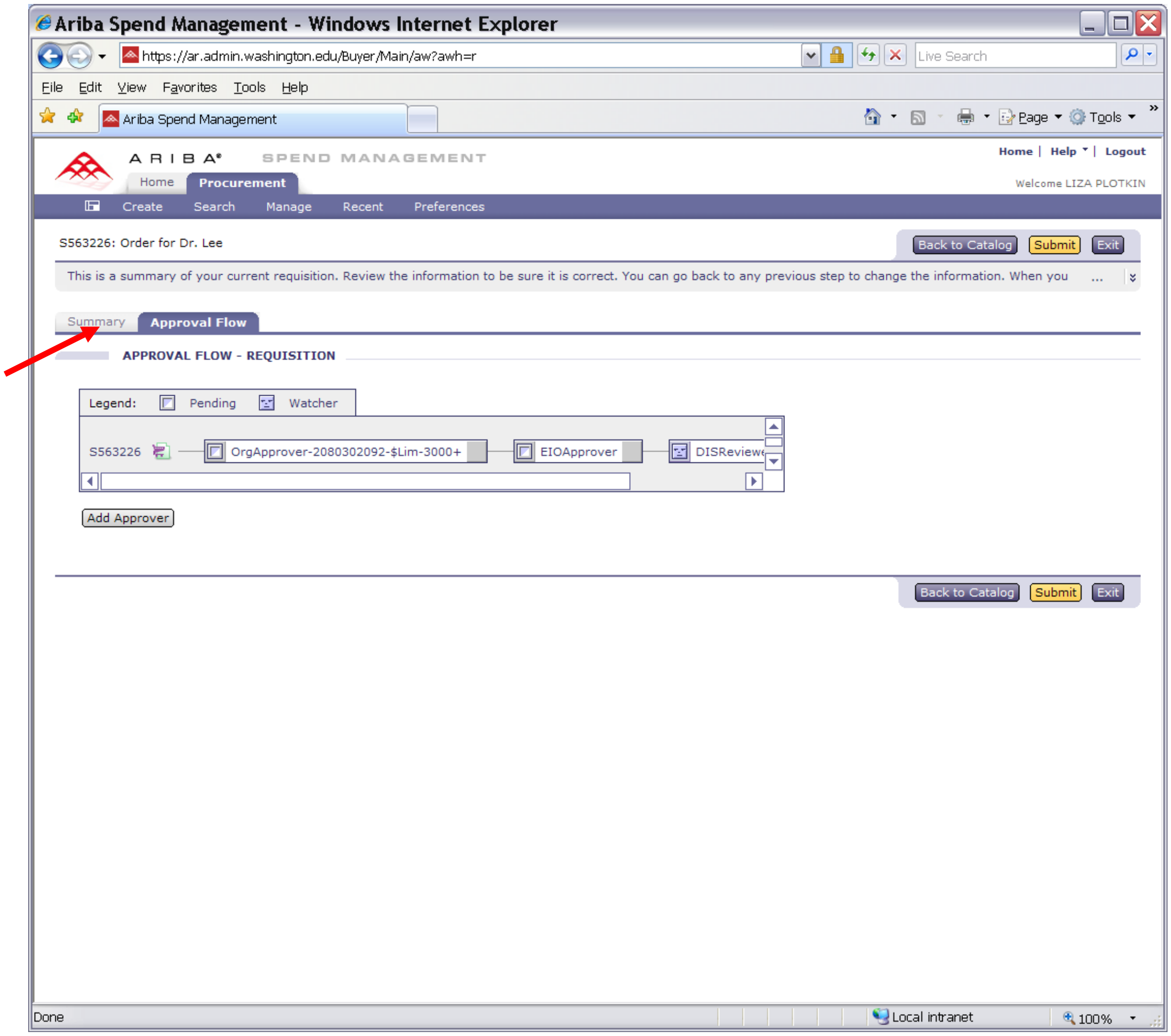
Click on the **Summary** tab to return to the summary of the **Checkout** screen.



If everything looks right and you are ready to send your order to vendors, click on **Submit** to submit your requisition.