

# eProcurement Training



**eProcurement Help Desk 206-543-4500**

**<https://f2.washington.edu/fm/ps/>**

**eProcurement Training Guide 3/5/14**

**I:\groups\procurement\Procurement Customer Service\Training\eLearning\eProc\How to Guides\How to Place an eProcurement Order**

## Access eProcurement

Do the following to access the Ariba system:

1. Login into the UW eProcurement website at <https://f2.washington.edu/fm/ps/>
2. Click on **Access eProcurement** in the upper left corner of the screen

**PROCUREMENT SERVICES**  
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Finance & Facilities

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### Welcome to UW Procurement Services

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We provide tools and guidance to the University of Washington community for a seamless procure to pay process.

#### Systems

**CLICK TO ACCESS**  
**UW eProcurement**  
UNIVERSITY OF WASHINGTON

**PAS**

- [Sole Source](#)
- [Attachments](#)
- [Purchase Orders](#)

[... more](#)

**ProCurement Card**  
**PaymentNet Connect**

**Travel**  
**PaymentNet Connect**

#### Information

**BUYING**

- [eProcurement Catalog](#)
- [Supplier Guide](#)
- [UW Contracts](#)
- [Procurement Guide](#)
- [Non Catalog Orders](#)
- [How to Buy - Procard](#)

**PAYING**

- [Non-PO Invoice](#)
- [Payments to Individuals](#)
- [Wire Payments](#)
- [Reimbursements](#)
- [Moving Expenses](#)

[... more](#)

**REPORTS & RECONCILIATION**

- [ProCard Reconciliation](#)
- [PDR \(Procurement Desktop Reports\)](#)
- [MyFD \(MyFinancial Desktop\)](#)
- [Tools for Reconciliation](#)
- [Fiscal Year End](#)

#### Annual Cost Savings

The money that we've helped save UW since July 1, 2013

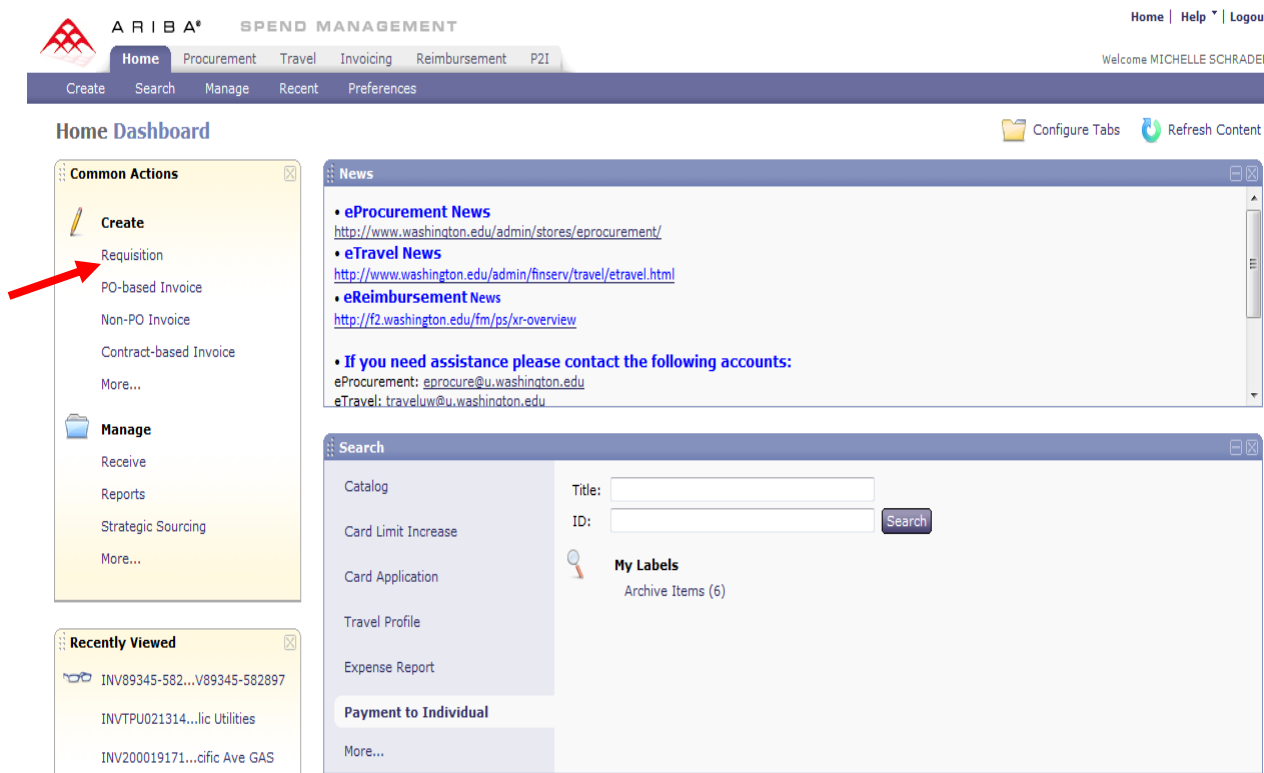
\$ 2, 3 7 6, 4 2 4

#### Quick Links:

- [Catering and Hotels](#)
- [Commodity Codes](#)
- [Corporate Travel Services](#)
- [Food Approvals](#)
- [Managed Print Services](#)
- [Moving Expenses](#)
- [MyFinancial.Desktop](#)
- [Object Codes](#)
- [Taxability Guide](#)
- [Travel Office](#)

## Guide to Creating a Requisition

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 – **\$537552**. When the requisition is submitted and the order goes through, the system will assign a Purchase Order number which starts with the “**EI**”.

The requisition number is our internal number and begins with “**S**”. Do not give this number to the supplier when contacting them. Instead, when the outside vendors are contacted for the status check of the order or for return, they should be supplied with the “**EI**” number.

The “**EI**” number is the only number that flows throughout the order process and should be used during the reconciliation process.

On the **Procurement** screen you may choose one of the suppliers listed (Punchout suppliers) or search for a product (Hosted suppliers).

**Punchout supplier:** A supplier with an online catalog connected to Ariba. To order, users are instructed to click a “Buy from supplier” to view the catalog.

**Hosted supplier:** The supplier’s products are loaded and maintained in the Ariba system. Users must enter the item they desire and click the Search button to see the products.

The screenshot displays the Ariba Spend Management interface. The top navigation bar includes 'Home', 'Procurement', 'Travel', 'Invoicing', 'Reimbursement', and 'P2I'. The 'Procurement' tab is active. On the left, a sidebar shows 'Supplier' filters (Bioline USA, Inc. (1), EXCEL GLOVES AND ... (1), Intermountain ... (1), Office Depot (37845), Promega Corporation (1)) and 'Language' (English (209395)). The main area shows a list of suppliers with logos and names, including Office Depot, Fisher Scientific, CDW Government, Praxair, Agilent Technologies, Anixter, Best Buy, Bio Rad, Bioline, Santa Cruz Biotechnology, Sigma-Aldrich, Spectrum Laboratory, Tech Depot, Troxell Communications, VWR, and Non-Contract Suppliers. A callout bubble points to the 'Choose a supplier' text, and another points to the 'Or search by product for Hosted suppliers' text.

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

# Ordering from Punchout Vendors

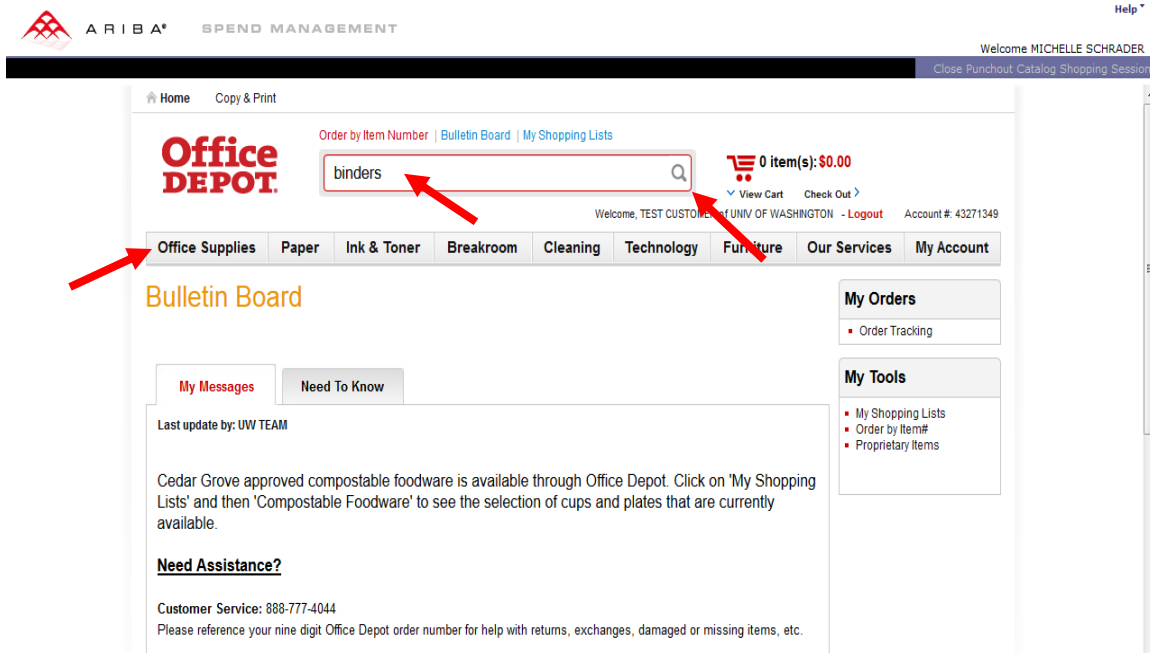
## 1. Click the supplier name Office Depot

The screenshot shows the Ariba Spend Management interface. The top navigation bar includes 'Home', 'Procurement', 'Travel', 'Invoicing', 'Reimbursement', and 'P2I'. The 'Procurement' tab is active. The left sidebar contains a 'Supplier' list with 'Office Depot (37845)' selected. The main area displays a grid of supplier logos and names, including Office Depot, Santa Cruz Biotechnology, Sigma-Aldrich, Spectrum Laboratory, Tech Depot, Troxell Communications, VWR, Best Buy, Bio-Rad, and Bioline. A red arrow points to the 'Office Depot' link in the first row of the grid.

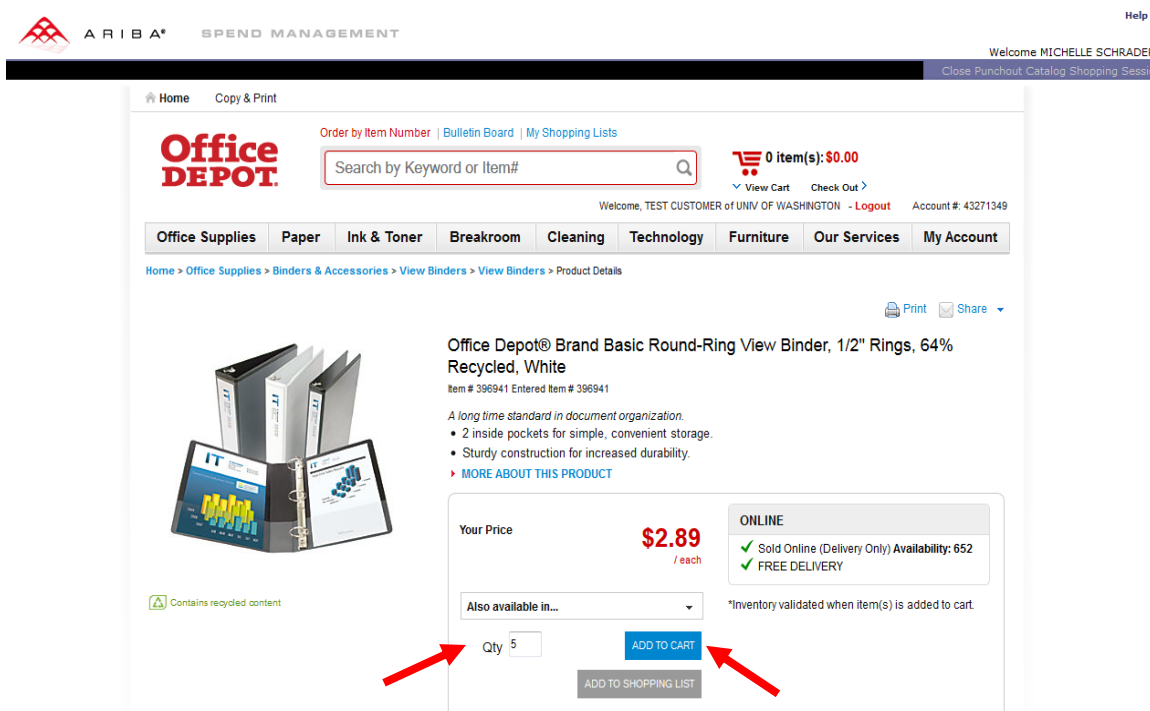
## 2. Click on the green Buy from Supplier button.

The screenshot shows the Ariba Spend Management interface after selecting 'Office Depot'. The 'Refine your results' sidebar on the left shows 'Recent Choices'. The main area displays the 'Office Depot' supplier details, including the 'Buy from Supplier' button. A red arrow points to the 'Buy from Supplier' button. The interface also shows the 'Catalog Home' section with a search bar and a 'Create Non-Catalog Item' button. The bottom of the page features a 'Checkout' button and a message: 'Can't find what you are looking for? Create a non-catalog item.'

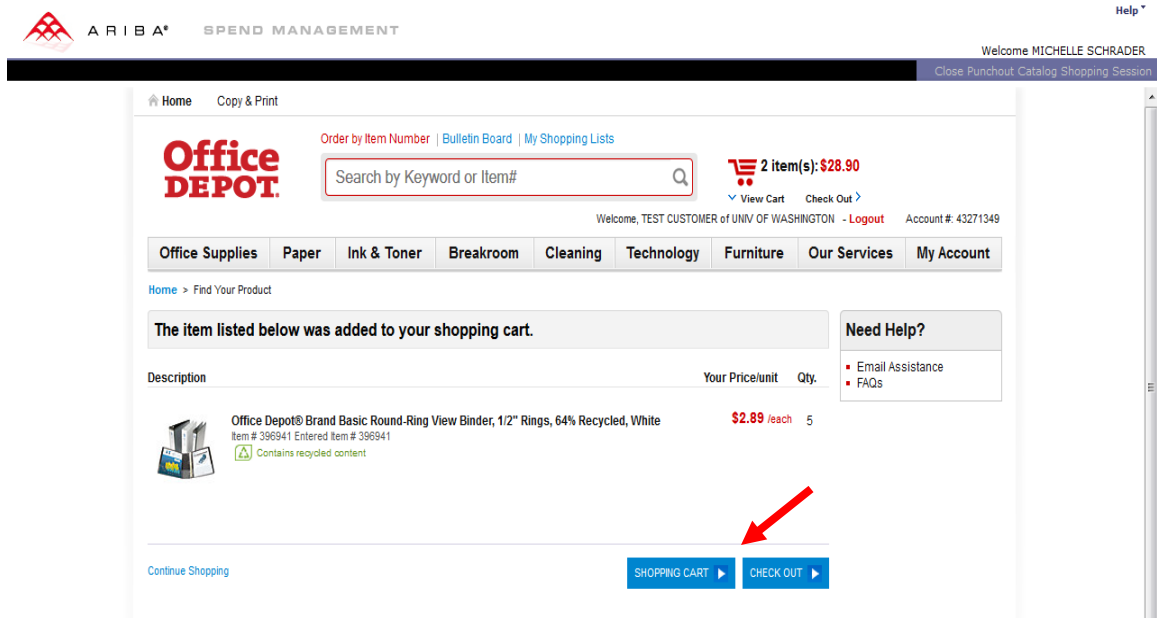
- This takes you to the supplier's catalog. In the **Search** field type either the **item's description** or the actual **item number** of the item you are looking for. Click the **Search icon** which looks like a magnifying glass. Alternately, you can click one of the main categories to begin your search.



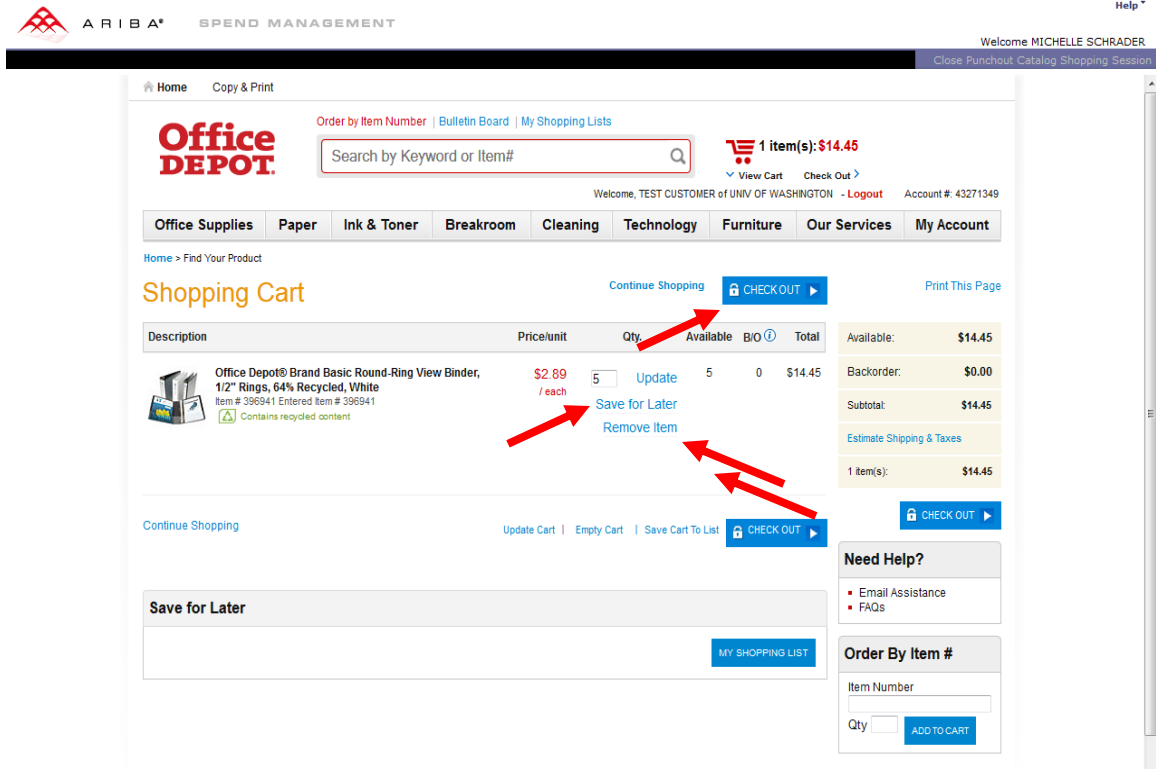
- Locate the item you would like to purchase. Type the quantity into the **Quantity** field. Click on **Add to Cart** button.



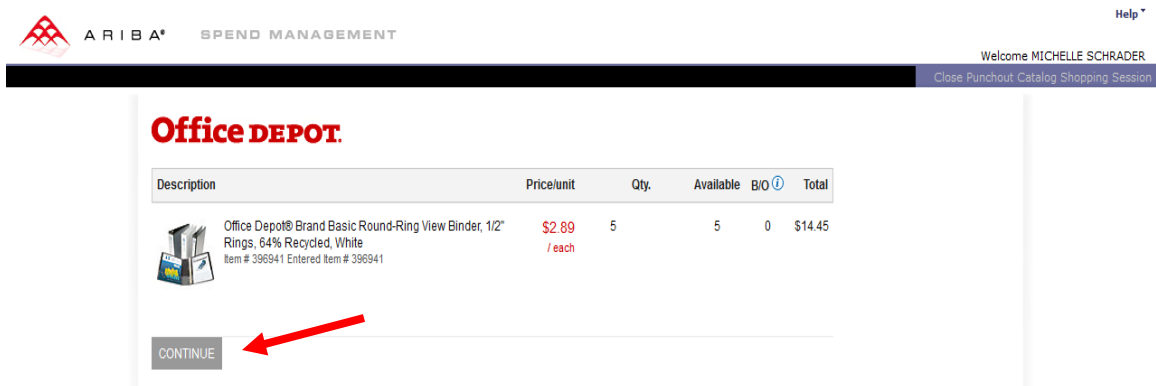
5. Once the items have been **added** to the **Shopping Cart**, you can view your shopping cart to make changes, add more items, or check out.



6. Click **Shopping Cart**. Once you view your shopping cart, you have several options:
  - a. Check Out
  - b. Change the quantity, then click **Update**
  - c. Remove the item from the cart by checking the **Remove** box
  - d. Save the item for later by clicking the **Save for Later** link



7. If done with ordering from Office Depot, click on **Check Out**. Click **Continue** to move the items back into Ariba to complete your order.



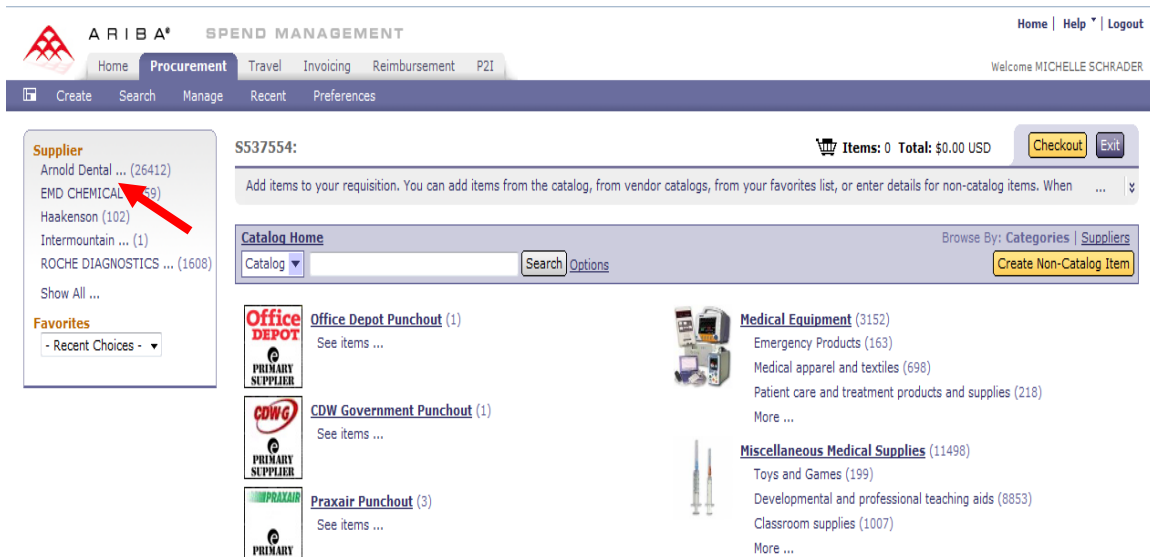
8. See the **Summary Screen** section on page 10 for how to complete and place your order.



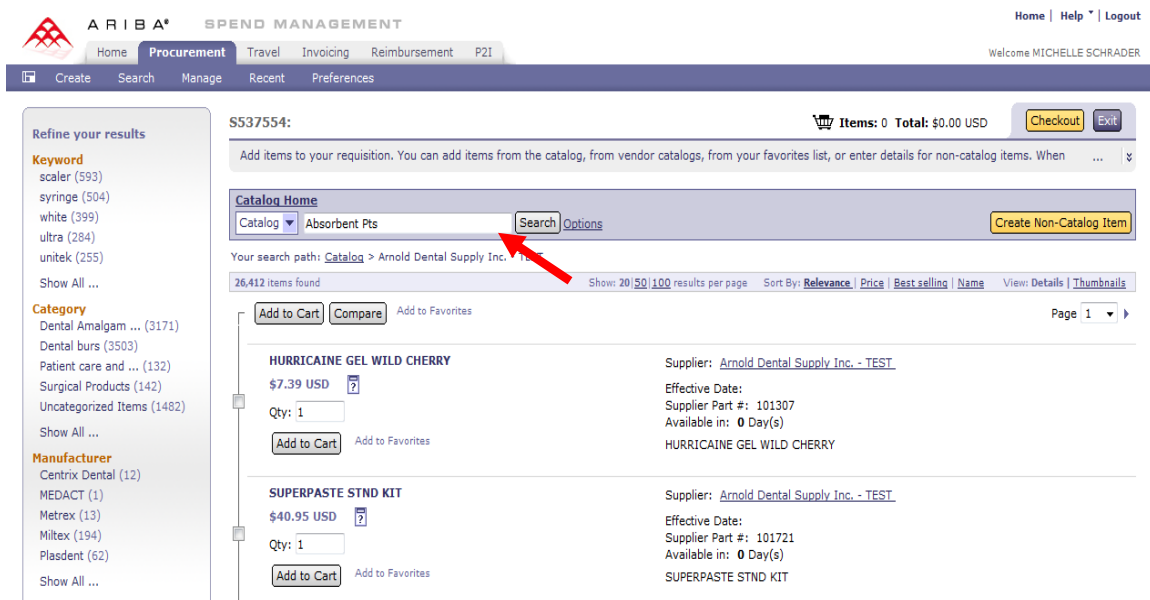
## Ordering from a Hosted Catalog

For this example, we will order an item from **Arnold Dental**, a **Hosted** catalog.

1. Click on **Arnold Dental** in the Supplier window on the left side of the screen.



2. Items from the **Arnold Dental** catalog will be displayed on the screen. You can search for items either by **Keyword** or by **Item Number**.
3. Type **Absorbent Pts** in the field to the left of the Search button



4. Find the item you need and **enter the quantity**. Click **Add to Cart**.

ARIBA® SPEND MANAGEMENT

Home | Help | Logout

Welcome MICHELLE SCHRADER

Create Search Manage Recent Preferences

Refine your results

**Keyword**

- cell (50)
- pak (23)
- fine (14)
- spillproof (12)
- spillpf (7)
- Show All ...

**Manufacturer**

- DIAD (26)
- Diadent (15)
- Kendall Health Care (12)
- KENDO (26)
- ZENTH (1)
- Show All ...

**Price**

- \$1.00 - \$10.00 USD (82)
- \$10.00 - \$100.00 USD (39)

**Favorites**

- Recent Choices -

S537554: Items: 0 Total: \$0.00 USD Checkout Exit

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 ...

**Catalog Home**

Catalog Absorbent Pts Search Options Create Non-Catalog Item

Your search path: Catalog > Arnold Dental Supply Inc. - TEST > "Absorbent Pts"

121 items found Show: 20 50 100 results per page Sort By: Relevance Price Best selling Name View: Details Thumbnails

Add to Cart Compare Add to Favorites Page 1

**ABSORBENT PTS GT .06**

\$15.97 USD Qty: 5 Add to Cart Add to Favorites

Supplier: [Arnold Dental Supply Inc. - TEST](#)

Effective Date:

Supplier Part #: 183854

Available in: 0 Day(s)

ABSORBENT PTS GT .06

**ABSORBENT PTS GT .04**

\$15.97 USD Qty: 1 Add to Cart Add to Favorites

Supplier: [Arnold Dental Supply Inc. - TEST](#)

Effective Date:

Supplier Part #: 183855

Available in: 0 Day(s)

ABSORBENT PTS GT .04

5. The items are now displayed on the **Summary** screen. On this screen, you can do the following for **Hosted** catalog items:
- Change the quantity of the item
  - Edit the item to add a budget number
  - Add another item from the catalog

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Home | Help | Logout

Welcome MICHELLE SCHRADER

Create Search Manage Recent Preferences

S537554: Back to Catalog Submit Exit

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 ...

**Summary** Approval Flow

Title: \*

On Behalf Of: MICHELLE SCHRADER

Delay Purchase Until: 206-685-0378

Telephone: 206-685-0378

Template:

My Labels: Apply Label...

**Line Items (1)** Hide Details

No.	Type	Description	Add. Info	Account	Budget	Task	Option	Project	Qty	Unit	Price	Amount
1		ABSORBENT PTS GT .06		059900	...				5	pack	\$15.97 USD	\$79.85 USD

Supplier: Arnold Dental Supply  
Contact: Arnold Dental Supply  
Commodity Code: General dental supplies  
Supplier Part Number: 183854  
Supplier Auxiliary Part ID:  
Is this M&E item? (Click for Yes): No  
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

Edit Copy Delete Add from Catalog... Add Non-Catalog Item...

**Total Cost: \$79.85 USD** Update Total

**SHIPPING - ENTIRE REQUISITION**

Ship To: (none selected)

Deliver To(Room/Name): \*

## Summary Screen

All the ordered items are now on the **Summary** screen. To complete your order, follow these steps:

1. Enter a Title
2. Review Line Items. If changes are required, click the **Edit** button. (See **Editing Items**) for more details.
3. Review and add **Delivery** information

**ARIBA\* SPEND MANAGEMENT** Home | Help | Logout

Home Procurement Travel Invoicing Reimbursement P2I

Create Search Manage Recent Preferences

Welcome MICHELLE SCHRADER

SS37554: [Back to Catalog](#) [Submit](#) [Exit](#)

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 ...

**Summary** Approval Flow

Title: \*

On Behalf Of: MICHELLE SCHRADER

Delay Purchase Until:

Telephone: 206-685-0378

Template:

My Labels: [Apply Label...](#)

**Line Items (1)** [Hide Details](#)

No.	Type	Description	Add.Info	Account	Budget:Task:Option:Project	Qty	Unit	Price	Amount
1		ABSORBENT PTS GT .06		059900	:::	5	pack	\$15.97 USD	\$79.85 USD

Supplier: Arnold Dental Supply  
Contact: Arnold Dental Supply  
Commodity Code: General dental supplies  
Supplier Part Number: 183854  
Supplier Auxiliary Part ID:  
Is this M&E item? (Click for Yes): No  
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

[Edit](#) [Copy](#) [Delete](#) [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$79.85 USD [Update Total](#)

**SHIPPING - ENTIRE REQUISITION**

Ship To: \* (none selected)

Deliver To(Room/Name): \*

## Editing Items

1. Check the **Box** to the left of the item you want to edit. *Note: Checking the box to the left of **No.** will allow the user to edit **ALL** items at once.*

**ARIBA<sup>®</sup> SPEND MANAGEMENT** Home | Help | Logout

Home | **Procurement** | Travel | Invoicing | Reimbursement | P2I

Welcome MICHELLE SCHRADER

Create Search Manage Recent Preferences

S537554: [Back to Catalog](#) [Submit](#) [Exit](#)

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 ...

**Summary** | Approval Flow

Title: \*

On Behalf Of: MICHELLE SCHRADER

Delay Purchase Until:

Telephone: 206-685-0378

Template:

My Labels: [Apply Label...](#)

**Line Items (1)** [Hide Details](#)

<input checked="" type="checkbox"/>	No.	Type	Description	Add.Info	Account	Budget:Task:Option:Project	Qty	Unit	Price	Amount
<input checked="" type="checkbox"/>	1		ABSORBENT PTS GT .06		059900	:::	5	pack	\$15.97 USD	\$79.85 USD

Supplier: Arnold Dental Supply  
Contact: Arnold Dental Supply  
Commodity Code: General dental supplies  
Supplier Part Number: 183854  
Supplier Auxiliary Part ID:  
Is this M&E item? (Click for Yes): No  
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

[Edit](#) [Copy](#) [Delete](#) [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$79.85 USD  
[Update Total](#)

**SHIPPING - ENTIRE REQUISITION**

Ship To: \* (none selected)

Deliver To(Room/Name): \*

2. Review and edit item, then click **OK**. On the Line Item Detail screen you can perform several tasks:
  - a. Change the quantity
  - b. Flag the item as Machine & Equipment (M&E) Tax Exempt
  - c. Change the Account Code
  - d. Change the Budget number
  - e. Split the order into multiple budgets
  - f. Add Project Cost Accounting (PCA) codes

S537554:

This is a summary of the item you selected. Change any editable field, and save your changes.

**LINE ITEM DETAILS**

Market Price:

No.: 1

Description: ABSORBENT PTS GT .06

Qty: 5

UOM: pack

Amount: \$79.85 USD

Price: \$15.97 USD

Commodity Code: General dental supplies

Supplier: Arnold Dental Supply

Contact: [Arnold Dental Supply \[ select \]](#)

Supplier Part Number: 183854

Supplier Auxiliary Part ID:

Is item named in grant? (Click for Yes): ☐ Yes ☒ No

Is similar equipment available for use? (Click for Yes): ☐ Yes ☒ No

[Restricted Equipment List](#)

[Equipment Object Codes](#)

Is this M&E item? (Click for Yes): ☐ Yes ☒ No

M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

**ACCOUNTING - BY LINE ITEM**

Account Code: 059900 (MISCELLANEO)

Object SubObject: 0599

Sub SubObject: 00

Budget Number: (none selected)

Organization Code: (no value)

Task:

Option:

Project:

[Split Accounting](#)

3. Review the Summary screen. If everything looks OK, click Submit.

SS37554: [Back to Catalog](#) [Submit](#) [Exit](#)

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 ...

**Summary** [Approval Flow](#)

Title: \* Test

On Behalf Of: MICHELLE SCHRADER

Delay Purchase Until:

Telephone: 206-685-0378

Template: ☐

My Labels: [Apply Label...](#)

No.	Type	Description	Add.Info	Account	Budget:Task:Option:Project	Qty	Unit	Price	Amount
1		ABSORBENT PTS GT .06		059900	143750:::	5	pack	\$15.97 USD	\$79.85 USD

Supplier: Arnold Dental Supply  
Contact: Arnold Dental Supply  
Commodity Code: General dental supplies  
Supplier Part Number: 183854  
Supplier Auxiliary Part ID:  
Is this M&E item? (Click for Yes): No  
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

[Edit](#) [Copy](#) [Delete](#) [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$79.85 USD  
[Update Total](#)

**SHIPPING - ENTIRE REQUISITION**

Ship To: \* 3917 UNIV WAY NE

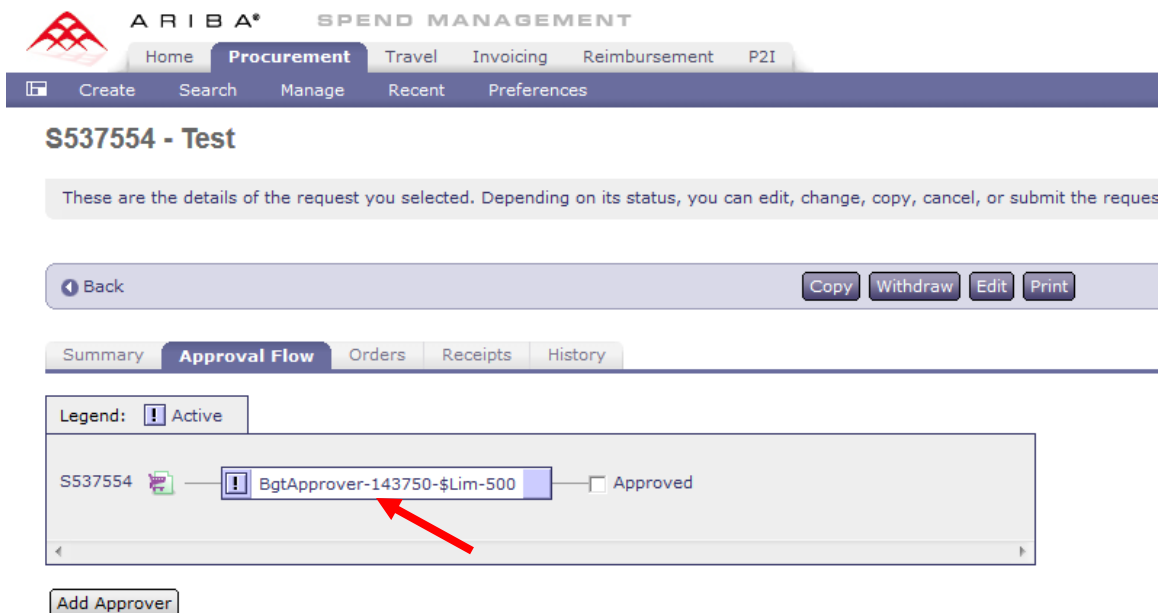
Deliver To(Room/Name): \* michells

4. You now have the following options:
- Print a copy of the request
  - View the status
  - Add labels to tag the document
  - Create the same type of request
  - Return to the Ariba Home page

5. Depending on the type of authorization a user has, the requisition may go to a Funding Approver to review. **Click View** the Status of this request.



6. This link returns you to the Approval Flow tab on your Requisition. To determine who the Approver is, click BgtApprover.



7. Ariba displays the names of the people who are authorized to Approve your request.

**A R I B A® SPEND MANAGEMENT**

Home **Procurement** Travel Invoicing Reimbursement P2I

Create Search Manage Recent Preferences

## Review Details for BgtApprover-143750-\$Lim-500

These are the details for the approver you selected.

ID: EP-BgtApprover-143750-\$Lim-500  
Name: BgtApprover-143750-\$Lim-500  
Description:

**Users who can approve:**

[HERIBERTO RODRIGUEZ](#) [MELANIE MC KAY FIELDS](#) [LAURIE A HUNT](#)

Done

8. Once your request is approved, Ariba creates a purchase order which begins with “EI”. The order then electronically transmits to the supplier who receives and places your order.
9. Invoices are sent through the Ariba system, matched against your EI purchase order, and paid to the supplier.