

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.

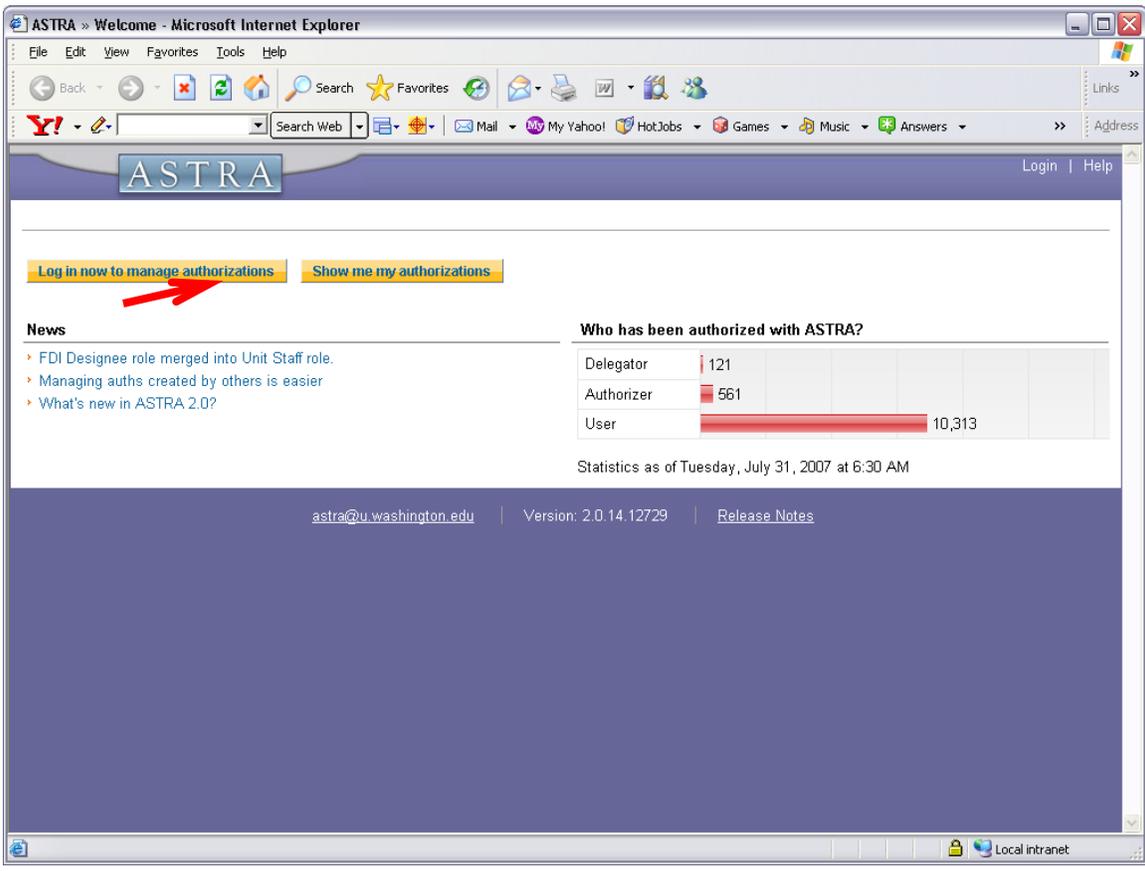
Astra/eProcurement User roles are only for people who will need to Approve, Watch or who are pre-approved to make purchases. Users typically will have one role but can have two or all three of them.

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.

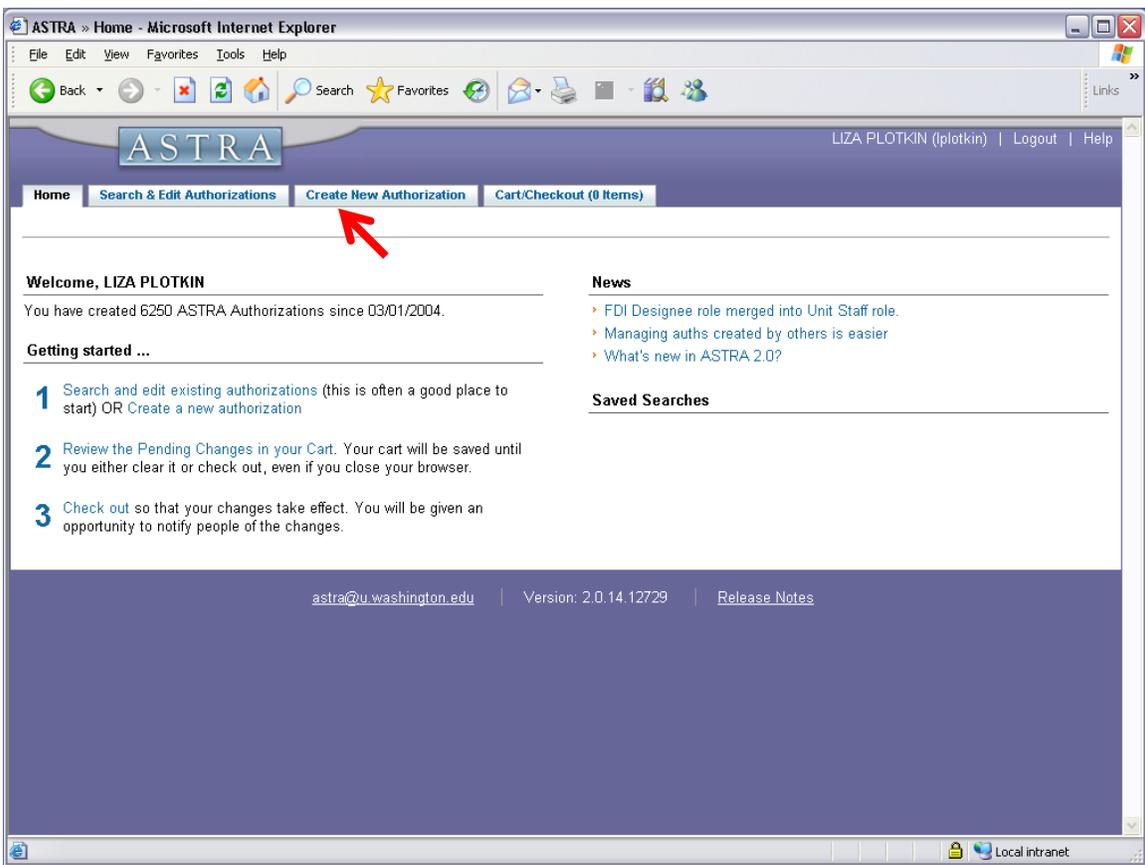
***Addition (4/11/1) - pages 8&9 of this document show step by step instructions on setting up Alcohol users**

Note: By giving an alcohol authorization to department staff, the unit Authorizer agrees to comply with relevant policies regarding the purchase, use and storage of ethyl alcohol within their unit. (See UW APS 15.1:

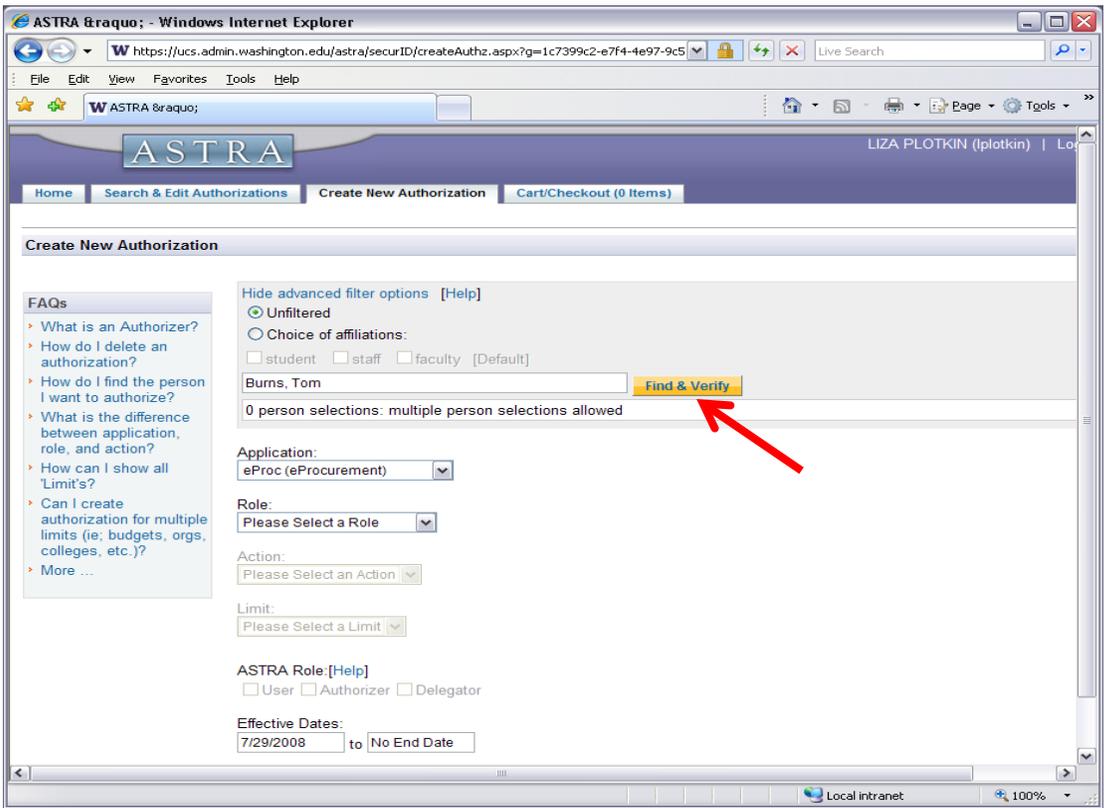
<http://www.washington.edu/admin/rules/policies/APS/15.01.html>)



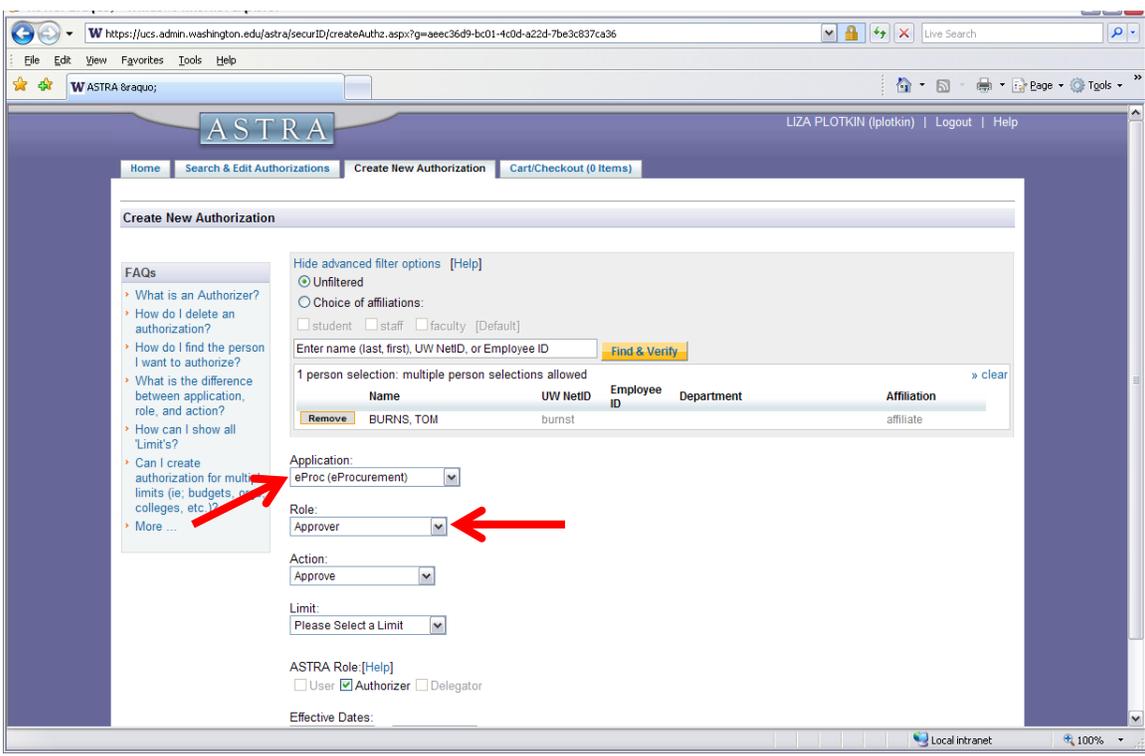
Access ASTRA. Click on Log in now to manage authorizations



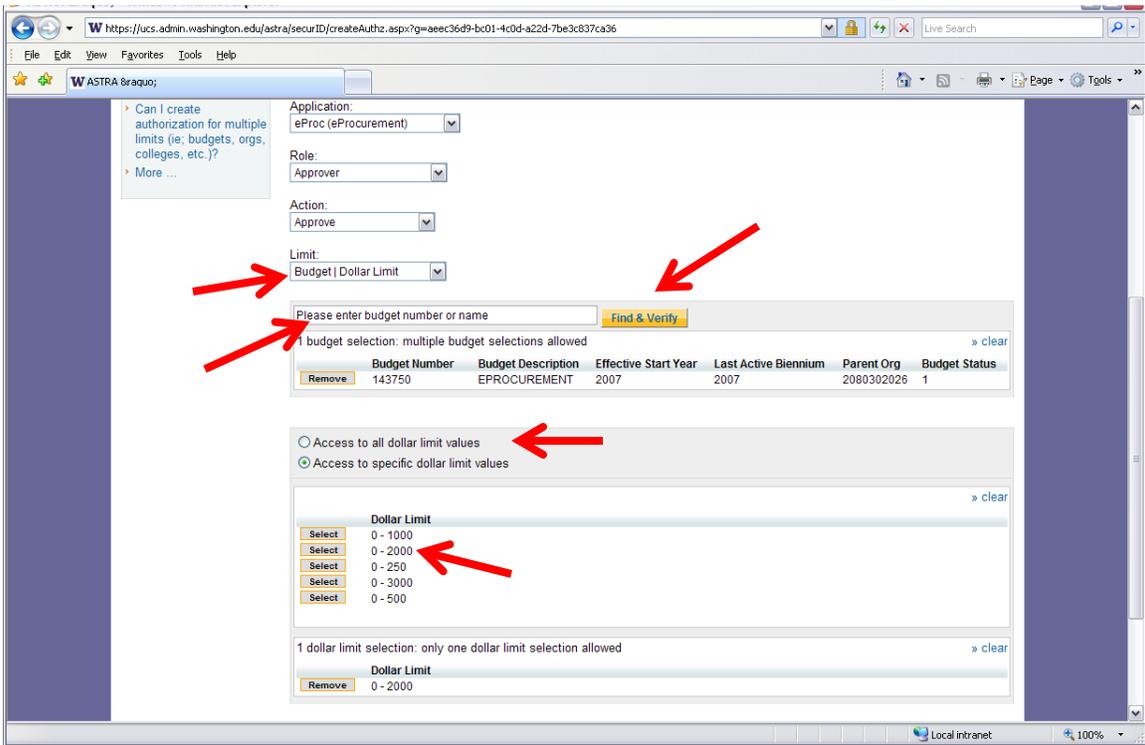
Click on Create New Authorization



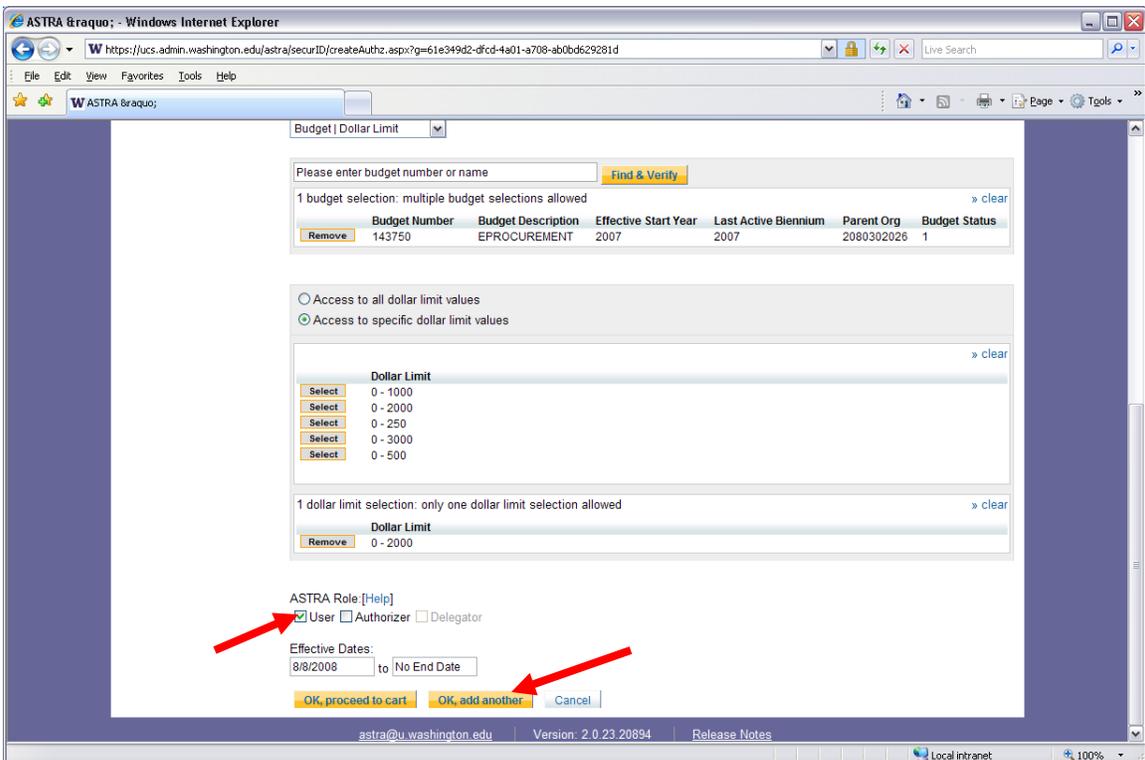
**Identify User by Name, UWNetId or EID. Click on Find & Verify.
If you can't find the user, click on Show Advanced Filter Options & then on the Unfiltered button.**



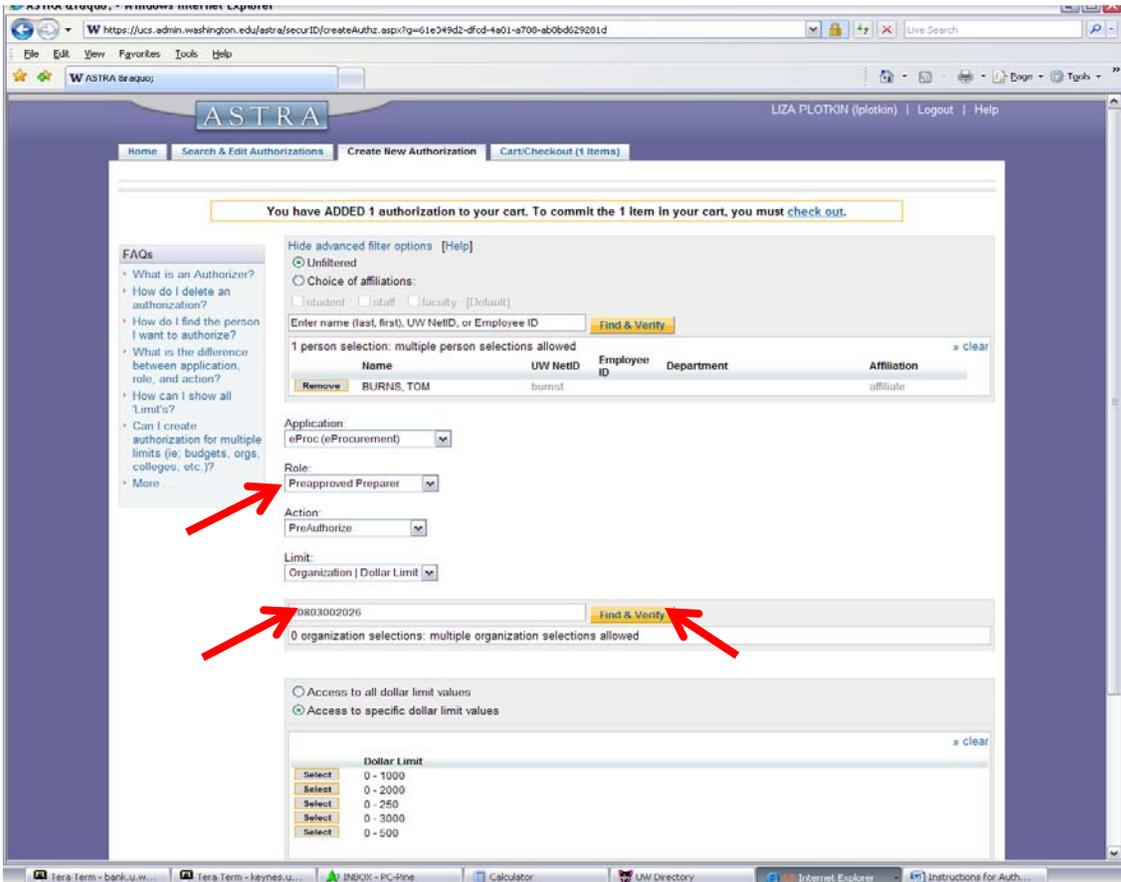
**This user will be authorized for all three roles. Having all three roles is not necessary.
Choose eProcurement for Application and Approver for Role.**



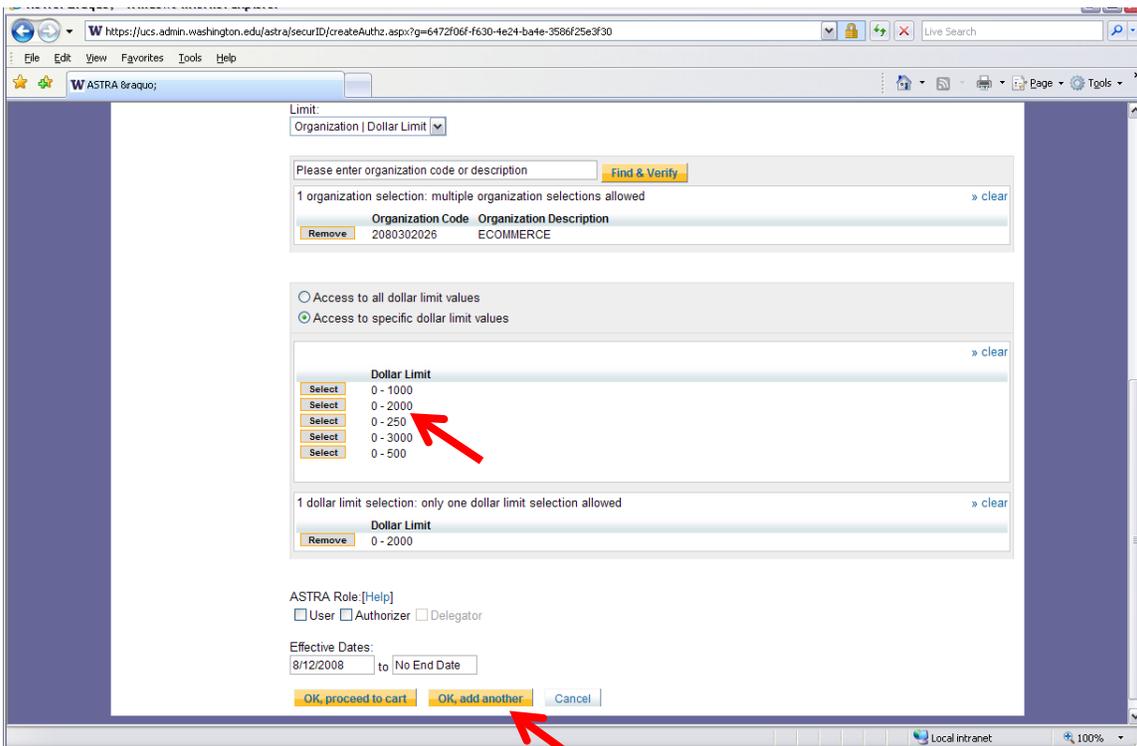
**Choose Budget or Organization under Limit.
 Type budget or org code. Click on Find & Verify.
 Select a dollar limit. For the limit over \$3,000 click on Access to all dollar limit values.**



**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:

**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

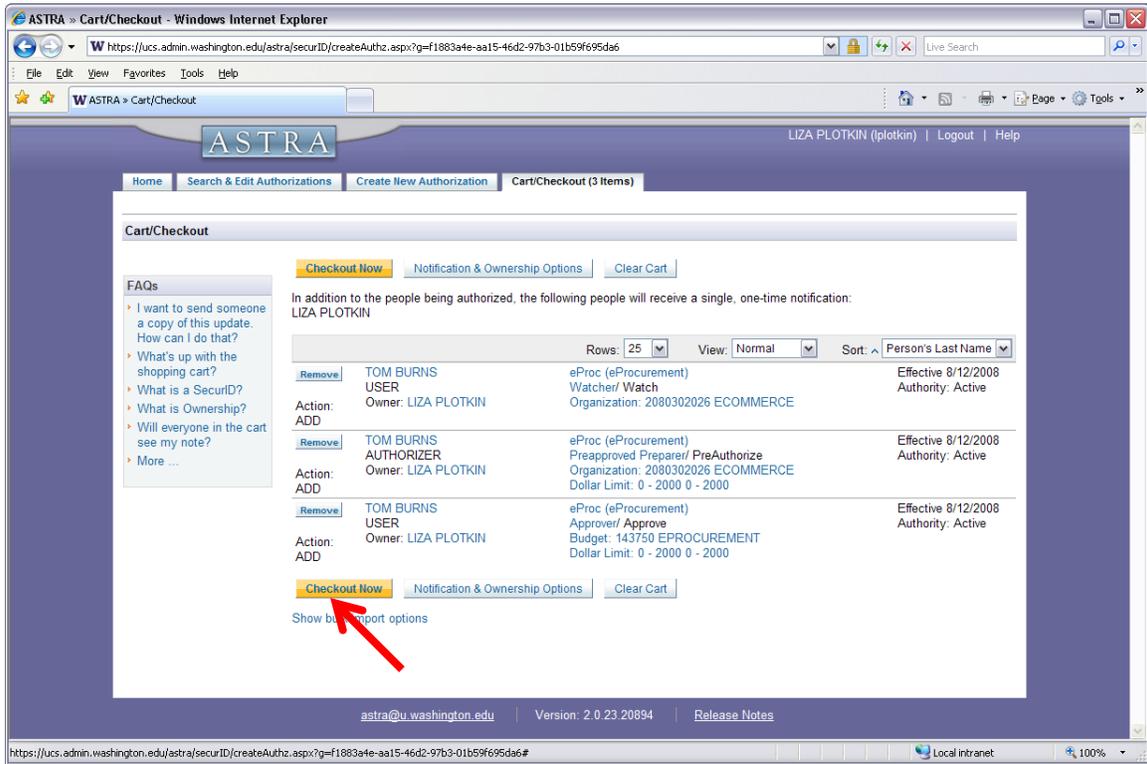
Organization Code	Organization Description
<input type="button" value="Remove"/> 2080302026	ECOMMERCE

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.**



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

Instructions for Authorizers on Setting Up Alcohol Users in ASTRA/eProcurement

ASTRA » - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Washington University of St. Louis
<https://iswwwweval3.cac.washington.edu/astra/securID/createAuthz.aspx?g=30fc3dddf-2a31-44f4-ba70-94bda24ecfe8>

ASTRA » LIZA PLOTKIN (lplotkin) | Logout | Help EVALUATION

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

Create New Authorization

Person Process [Help]

Show advanced filter options [Help]

Enter name (last, first, UW NetID, or Employee ID) **Find & Verify**

1 person selection: multiple person selections allowed [clear](#)

Name	UW NetID	Employee ID	Department	Affiliation
Remove COLLORD, BECKYA	bcollord	860000189	Dean of Medicine	staff

Application: eProc (eProcurement)

Role: Preapproved Preparer

Action: PreAuthorize

Limit: **Commodity | Organization**

Please Select a Limit

- No Limit
- Organization | Dollar Limit
- Budget | Dollar Limit
- Commodity
- Commodity | Budget
- Commodity | Organization**
- Controlled Commodity

Commodity Description: Alcohol

0 commodity selections: multiple commodity selections allowed

Please enter organization code or description **Find & Verify**

0 organization selections: multiple organization selections allowed

ASTRA Role: [Help]

User Authorizer Delegator Process Authorizer Process Delegator

Effective Dates:

Choose the following for setting the Alcohol Users:

Application - **eProcurement**

Role – **PreApproved Preparer**

Action – **PreAuthorize**

*Limit - **Commodity | Organization or Commodity|Budget**

*Alcohol Authorization now requires specifying a “limit” by budget(s) or organization code(s)

ASTRA » - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Washington.edu https://lswww.veval3.cac.washington.edu/astra/securID/createAuthz.aspx?g=84378a8d-832b-42b5-9b7e-d35020ffc29

ASTRA » Welcome

Show advanced filter options [Help]

Enter name (last, first), UW NetID, or Employee ID [Find & Verify](#)

1 person selection: multiple person selections allowed [clear](#)

Name	UW NetID	Employee ID	Department	Affiliation
Remove COLLORD, BECKYA.	bcollord	860000189	Dean of Medicine	staff

Application: eProc (eProcurement)

Role: Preapproved Preparer

Action: PreAuthorize

Limit: Commodity | Organization

[Commodity Code](#) [Commodity Description](#) [clear](#)

Commodity Code	Commodity Description
Select Alcohol	Alcohol

1 commodity selection: multiple commodity selections allowed [clear](#)

Commodity Code	Commodity Description
Remove Alcohol	Alcohol

Please enter organization code or description [Find & Verify](#)

1 organization selection: multiple organization selections allowed [clear](#)

Organization Code	Organization Description
Remove 304000000	SCHOOL OF MEDICINE

ASTRA Role: [Help]

User Authorizer Delegator Process Authorizer Process Delegator

Effective Dates: 4/11/2011 to No End Date

[OK, proceed to cart](#) [OK, add another](#) [Cancel](#)

In our example **Commodity|Organization** is chosen under ‘**limit**’
 Select **Alcohol** under ‘**commodity**’
 Enter **Organizational Code**
 Choose **User** under ‘**ASTRA Role**’
 Click on “**OK to proceed to cart**”
 Click on “**Checkout**” when in the cart