eProcurement Training

eProcurement Help Desk 206-543-4500

http://f2.washington.edu/fm/ps/
Access eProcurement

Do the following to access the Ariba system:

1. Login into the UW eProcurement website at http://f2.washington.edu/fm/ps/
2. Click on Ariba Login in the upper right corner of the screen and enter your UW Net ID and password.
Guide to Creating a Requisition

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

The system has automatically assigned a **requisition number** to the order in the upper left corner – **S537552**. 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.

*Budgets numbers and item numbers in this manual are used only as examples,*
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.

*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

2. Click on the green **Buy from Supplier** button.
3. 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.

4. 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.

5. The items are now displayed on the Summary screen. On this screen, you can do the following for Hosted catalog items:
   a. Change the quantity of the item
   b. Edit the item to add a budget number
   c. Add another item from the catalog
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
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.
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
3. Review the Summary screen. If everything looks OK, click Submit.

4. You now have the following options:
   a. Print a copy of the request
   b. View the status
   c. Add labels to tag the document
   d. Create the same type of request
   e. 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.
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.