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)

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• What's new in ASTRA 2.0?	User 10,313	
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1 Search and edit existing authorizations (this is often a good place to start) OR Create a new authorization	Saved Searches
2 Review the Pending Changes in your Cart. Your cart will be saved until you either clear it or check out, even if you close your browser.	
3 Check out so that your changes take effect. You will be given an opportunity to notify people of the changes.	
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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.

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This user will be authorized for all three roles. Having all three roles is not necessary.

Choose eProcurement for Application and Approver for Role.

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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.

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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.

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

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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.

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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.

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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

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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)

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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 9