

How to setup a default budget number and a default delivery address in eProcurement

1. Click on **Preferences** on the blue toolbar.

The screenshot shows the ARIBA Spend Management Invoicing Dashboard. The top navigation bar includes 'Home', 'Procurement', 'Travel', 'Invoicing', 'Reimbursement', and 'P2I'. The 'Invoicing' menu is expanded, and the 'Preferences' option is circled in red. The dashboard contains several panels: 'Common Actions' (Create and Manage), 'Recently Viewed', 'Search' (with fields for Invoice Title and ID), 'My Saved Searches', 'My Labels', 'To Do' (with a table of tasks), and 'My Documents' (with a table of documents).

Date ↓	Status	Title
2/21/2014	Submitted	WPA administrative fee (NOREEN SLEASE)
2/21/2014	Submitted	INV359-575312 (AMY D SCHRADER)

Title	Date ↓	Status
INV478209	7/23/2013	Composing
INV*139954-463901	6/21/2013	Reconciled
INV*140171-463900	6/21/2013	Reconciled
INV*139794-463899	6/21/2013	Reconciled
Interagency Network Project	4/30/2013	Reconciled
One America Network Project	4/24/2013	Reconciled
Interagency Network Project	4/24/2013	Reconciled
INVUWCivicore Stmt-403349	2/15/2013	Reconciled
Behavior survey software	2/1/2013	Reconciled
INV*33188-393368	1/25/2013	Reconciled
INV1111817-391726	1/22/2013	Reconciled
INV1111683-391725	1/22/2013	Reconciled

2. Click on **Change Your Profile**.

The screenshot shows the ARIBA Spend Management Invoicing Dashboard with the 'Preferences' menu expanded. The 'Change your profile' option is circled in red. The dashboard layout is identical to the previous screenshot, but the 'Preferences' dropdown menu is open, showing options like 'Delegate authority', 'Change your profile', 'Change default local and currency', 'Change email notification preferences', and 'Reset default preference'.

3. Click on Step 2, **Account/Ship**.

The screenshot shows the ARIBA Spend Management interface. The user is logged in as MICHELLE SCHRADER. The page title is "UP43845: User Profile Changes for MICHELLE SCHRADER". The left sidebar shows a navigation menu with five steps: 1. Personal Info, 2. Account/Ship (highlighted with a red circle), 3. Justify Changes, 4. Approval Flow, and 5. Review Changes. The main content area is titled "DEFAULT ACCOUNT/SHIP INFORMATION DOES NOT APPLY TO eTRAVEL". It contains two sections: "1. Change your accounting information:" and "2. Change your shipping and delivery information:". The first section has a "Budget Number" field with a dropdown menu showing "143750 (EPROCUREMENT)" and an "Organization Code" field with "2080302026 (ECOMMERCE) Bien:2013". The second section has a "Ship To" dropdown menu showing "PURCHASING & ACCO" and a "Deliver To(Room/Name)" text field with "Flr 2/M. Schrader". A note at the bottom states "(*) indicates a required field". Navigation buttons "Prev", "Next", and "Exit" are visible at the top right and bottom right.

4. To setup a default budget number, or change a default number, click on the **down arrow** in the budget field, then click on "**Search for more**" in the dropdown menu.

This screenshot is similar to the previous one but shows the "Budget Number" dropdown menu open. A red arrow points to the down arrow in the dropdown. The dropdown menu lists "143750 (EPROCUREMENT) Bien:2013" and a "Search for more..." option with a search icon. The "Account/Ship" step in the sidebar is also highlighted with a red circle. The rest of the page content, including the navigation menu and other form fields, remains the same as in the previous screenshot.

5. Enter your budget number. (Do not enter a dash. Search for 149401, not 14-9401.) Click Search.

The screenshot shows the ARIBA Spend Management interface. The user is logged in as MICHELLE SCHRADER. The page title is "UP43846: User Profile Changes for MICHELLE SCHRADER". The "Personal Profile" section is active, and the "Account/Ship" tab is selected. The "Budget Number" field is set to "143750". A modal window titled "Choose Value for Budget Number" is open, displaying an alert: "Alert: There are too many matches to display the entire list. Refine your search criteria and try again." The "Field: Budget#" dropdown is set to "143750", and the "Search" button is highlighted with a red circle. Below the search field, a table lists budget options:

Budget#	Name	Org Code	Status	Eff. Date	Biennium
(no value)					

The "Select" button next to the "(no value)" row is highlighted with a red circle. The "Done" button is also visible at the bottom of the modal.

6. Click the **Select** button on the budget line.

The screenshot shows the ARIBA Spend Management interface. The user is logged in as MICHELLE SCHRADER. The page title is "UP43845: User Profile Changes for MICHELLE SCHRADER". The "Personal Profile" section is active, and the "Account/Ship" tab is selected. The "Budget Number" field is set to "143750". A modal window titled "Choose Value for Budget Number" is open, displaying an alert: "Alert: There are too many matches to display the entire list. Refine your search criteria and try again." The "Field: Budget#" dropdown is set to "143750", and the "Search" button is highlighted with a red circle. Below the search field, a table lists budget options:

Budget#	Name	Org Code	Status	Eff. Date	Biennium
(no value)					
143750	EPROCUREMENT	2080302026	1	20070701	2013

The "Select" button next to the "143750" row is highlighted with a red circle. The "Done" button is also visible at the bottom of the modal.

7. To enter or change your default **Ship To address**, click on the **down arrow** in the Ship To field, then click on **“Search for more”** in the dropdown menu.

The screenshot shows the ARIBA Spend Management interface. The user is logged in as MICHELLE SCHRADER. The page title is "UP43845: User Profile Changes for MICHELLE SCHRADER". The main content area is titled "DEFAULT ACCOUNT/SHIP INFORMATION DOES NOT APPLY TO eTRAVEL".

Section 1: Change your accounting information:
 Budget Number: 143750 (EPROCUREMENT)
 Organization Code: 2080302026 (ECOMMERCE) Bien:2013

Section 2: Change your shipping and delivery information:
 Ship To: PURCHASING & ACCO (indicated by a red arrow)
 Deliver To(Room/Name): EPROCUREMENT
 PURCHASING & ACCOUNTING BLDG
 Harborview Medical Center

A red circle highlights the "Search for more..." option in the dropdown menu. A red arrow points to the dropdown arrow in the "Ship To" field.

8. Enter your **street** address or the building name. If you are using a street address change the **Name** field to **Street**, then enter search criteria for the street address (Example: 1. for 401 Queen Anne Ave. N., enter only **401** into the **Street** field. For 825 Eastlake Ave East, enter only **825**).

(Example: 2. for Purchasing Bldg., enter “Purchasing” into the Name Field. For the Health Sciences Bldg., enter “Health”). Click on Search.

The screenshot shows the "Choose Value for Ship To" search results page. The search criteria are "401" in the "Street" field. The results table lists various addresses with columns for Name, Street, City, State, and Country. The "Street" field is circled in red, and the "Search" button is also circled in red. The "Street" dropdown menu is open, showing "Street" selected.

Name	Street	City	State	Country
100 NE NORTHLAKE	100 NE NORTHLAKE WY	SEATTLE	WA	United States
10303 MERIDIAN AVE	10303 MERIDIAN AVE	SEATTLE	WA	United States
1071 WING DRIVE	1071 WING DRIVE	ANN ARBOR	MI	United States
10750 30TH AVE NE	10750 30TH AVE NE	SEATTLE	WA	United States
1100 NE 45TH ST	1100 NE 45TH ST	SEATTLE	WA	United States
1101 SENECA STREET	1101 SENECA STREET	SEATTLE	WA	United States
1103 "A" STREET	1103 "A" STREET	TACOMA	WA	United States
1103 NE BOAT STREET	1103 NE BOAT STREET	SEATTLE	WA	United States
1107 NE 45TH STREET	1107 NE 45TH ST	SEATTLE	WA	United States
11136 NE 180TH STREET-UWB2	11136 NE 180TH STREET	BOTHELL	WA	United States
1117 NE BOAT ST	1117 NE BOAT ST	SEATTLE	WA	United States
113 DEXTER AVE	113 DEXTER AVE	SEATTLE	WA	United States

9. Click on **Select** to choose the right location.

The screenshot shows the ARIBA Spend Management interface. A modal window titled "Choose Value for Ship To" is open. It has a search field with "Street" selected and "401" entered. Below the search field is a table with columns: Name, Street, City, State, Country, and a "Select" button. The table lists several addresses in Seattle, WA. The "Select" button for "Northwest Lipid Research" is circled in red. The background shows the "Personal Profile" page with "Account/Ship" selected in the sidebar. The "DEFAULT ACCOUNT/SHIP INFORM" section is visible, showing "Budget Number: 143750 (E)" and "Organization Code: 208030202".

Name	Street	City	State	Country	Select
1401 E JEFFERSON	1401 E JEFFERSON	SEATTLE	WA	United States	Select
1401 NE BOAT ST	1401 NE BOAT ST	SEATTLE	WA	United States	Select
HARBORVIEW-PATRICIA STEELE	401 BROADWAY	SEATTLE	WA	United States	Select
LPPG/NWI	401 QUEEN ANNE AVE N	SEATTLE	WA	United States	Select
Northwest Lipid Research	401 QUEEN ANNE AVE N	SEATTLE	WA	United States	Select
PATRICIA STEEL BLDG	401 BROADWAY	SEATTLE	WA	United States	Select
SODO (UWMC Storage)	2401 UTAH AVE SOUTH	SEATTLE	WA	United States	Select
VISITORS INFORMATION CENTER	4014 UNIV WAY NE	SEATTLE	WA	United States	Select

10. Change your **Deliver To (Room/Name)**. Remember to put the room number **in front** of the name. (You only have **20 characters** in this field so you might have to abbreviate your name. The **critical** information is the **room number**). For the HSB building show the wing with the room number: RmT324/Smith

The screenshot shows the ARIBA Spend Management interface. The "Personal Profile" page is displayed, with "Account/Ship" selected in the sidebar. The "DEFAULT ACCOUNT/SHIP INFORMATION DOES NOT APPLY TO eTRAVEL" message is shown. Under "1. Change your accounting information:", "Budget Number: 143750 (EPROCUREMENT)" and "Organization Code: 2080302026 (ECOMMERCE) Bien:2013" are visible. Under "2. Change your shipping and delivery information:", "Ship To: PURCHASING & ACCO" is selected. The "Deliver To(Room/Name)" field is circled in red and contains the text "Flr 2/M. Schrader".

11. Click on **Step 5 Review Changes**. (Steps 3 Justify Changes and 4 Approval Flow are **not** used for Profile updates.)

The screenshot shows the ARIBA Spend Management interface for 'User Profile Changes for MICHELLE SCHRADER'. The left sidebar contains a navigation menu with five steps: 1 Personal Info, 2 Account/Ship, 3 Justify Changes, 4 Approval Flow, and 5 Review Changes. Step 5 is highlighted with a red circle. The main content area displays a table of changes with columns 'Change', 'From', and 'To'. The 'From' and 'To' columns for the 'Deliver To' change are circled in red. Below the table, there are 'Prev', 'Submit', and 'Exit' buttons. A note indicates that an asterisk (*) denotes a required field.

Change	From	To
Deliver To	Flr 2/M. Schrader	Flr 2/Schrader

12. Click **Submit**. *

This screenshot is identical to the previous one, but the 'Submit' button in the top right corner of the main content area is circled in red, indicating the next step in the process.

*Important: you **must** click on “**Submit**” button for these changes to take effect.