

UNIVERSITY OF WASHINGTON, BOTHELL

POLICIES AND PROCEDURES MANUAL

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- Policy 3.5
REV 04/05
- Definitions Finance and Administration
425.352.5235
- Procedure
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General eProcurement (UW Stores) Policies

OVERVIEW

The eProcurement system is the University's online system for purchasing office supply items, certain office machines, scientific equipment and supplies, and hundreds of other items. The University Stores office in Seattle began, during Autumn 2003, the conversion to the latest version of online Stores ordering, called eProcurement Phase II. Enhanced functionality in the latest version of stores includes electronic approval routing, split coding for single or multiple items, and a central catalog and ordering system for multiple vendors (such as Stores, Corporate Express, Dell, etc). The products offered by the vendors in the eProcurement catalogs are at contractually negotiated pricing, meaning there is no overall dollar limitation on the amount of an order placed using eProcurement.

POLICY

The University of Washington allows for departmental purchasing using online access through eProcurement. The items available in eProcurement are items carried in UW Stores, as well as several other non-UW vendors. The non-UW vendors are included at prices negotiated between the University and the vendors. Because the UW Stores and non-UW vendor items are made available at already negotiated rates, there is no dollar limit on the amount of individual or total purchase that can be made using eProcurement.

In accordance with University rules regarding [restricted purchases](#), items available through eProcurement must be purchased using eProcurement rather than going to other vendors such as office supply stores.

Access to eProcurement is granted by the appropriate Program Director, Director or Manager. Access is limited to the requestor's department budgets, or can be further limited to specific budgets within the department. Once access is approved by the Program Director, Director or Manager, the [Finance and Administration Manager](#) is notified and will process the eProcurement addition. Also, changes to specific budget access and user cancellations should be forwarded to the [Finance and Administration Manager](#).

DEFINITIONS

The ordering process using Phase II includes distinct roles for the Authorizer, Approver, and Enterer:

- Authorizer – Person delegated purchasing authority from Chancellor, Program Director, etc., or Principal Investigators on a grant.
- Approver – Person delegated purchasing authority from Authorizer, who reviews each individual Stores purchase.
- Enterer – Person with specific authority and responsibility for entering Stores purchasing into the online system.

PROCEDURES

Individuals interested in being an Approver or Enterer should first contact their departmental Authorizer (typically Program Director, Manager, etc). There is no specific form required for requesting access to eProcurement Phase II, but the department Authorizer does need to acknowledge, and approve, of the role to be assigned to the person requesting access.

Requesting Enterer Access

Once the necessary departmental approval is granted, the Authorizer should notify the [Finance and Administration Manager](#) via email, or hardcopy at Box 358525. The F&A Manager will process the request and send an email to the Enterer and Authorizer when access has been given. The following information will be needed to process the request for Enterer access:

- Employee Name
- UWNNetID
- Budget Number(s), or Organizational Code(s), the Enterer will be entering UW Stores orders for

The security setup for Enterers is not budget number (or organizational code) specific, but defining which budget number(s) the Enterer will be entering for will help to clarify who the requestors should contact to place an order, and also helps to clarify the approval process once an order is placed.

Requesting Approver Access

A person needing Approver access would initiate the access request by contacting the Authorizer for their approval. Once approval is given, the Authorizer should contact the [Finance and Administration Manager](#) via email, or hardcopy at Box 358525. The following information will be needed to process

the request for Approver access:

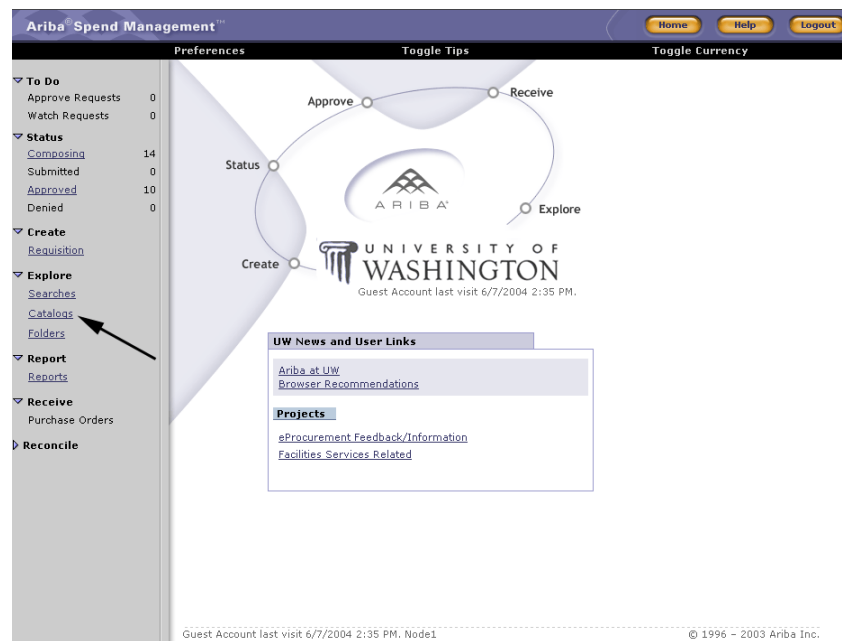
- Employee Name
- UWNetID
- Budget Number(s), or Organizational Code(s), the Authorizer will be approving UW Stores orders for

Requesting Authorizer Access

Authorizer access is generally determined by virtue of employment as a Director or Manager, assuming spending authority for specific budgets has been delegated by the Chancellor. Individuals desiring Authorizer authority relating to eProcurement should contact [Finance and Administration Manager](#).

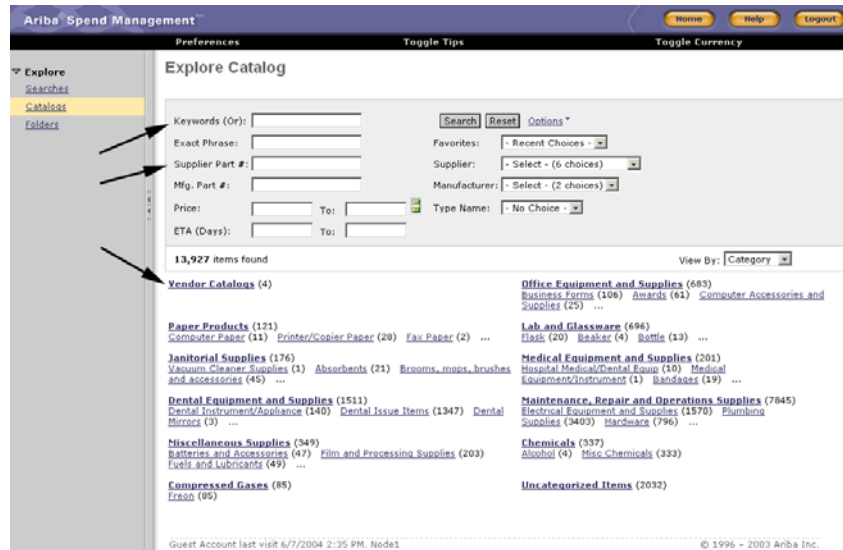
Order Entry Process

The Enterer will need to access the eProcurement log-in from the [UW Purchasing/Stores web site](#). After entering the user's UWNetID and password, the Enterer will view the following screen:



Although there are many different ways to search, view, select and order items, following are the recommended steps in the ordering process:

1. Select "Catalogs" on the left window pane, and the following screen will appear:



2. The Enterer can then either (a) search for items using a Keyword or Item # search, or (b) browse the catalog by category to locate items.
 - a. The Keyword and Item # search functions are located in the upper portion of the screen, shaded in grey. Enter the appropriate keyword or item number, then select “Search.” For subsequent searches, select “Reset” to begin a new search.
 - b. To browse catalogs, selection the appropriate category in the bottom portion of the screen, and drill-down through the categories to locate the desired items.

Note that the categories and items displayed are items that are carried in the UW Stores inventory. To select other catalogs (such as Corporate Express, Dell, etc.), select “Vendor Catalogs” then a new web page will appear and the Enterer can select “Buy from Supplier” for the desired vendor:

Explore Catalog

Search In: [Entire Catalog](#) > [Vendor Catalogs](#)

Keywords (Or):

Exact Phrase: Favorites:

Supplier Part #: Supplier:

Mfg. Part #: Manufacturer:

Price: To: Type Name:

ETA (Days): To:

4 items found Show Results: View By:

4 items found in: **Vendor Catalogs**

Corporate Express Secure Catalog Link* Supplier: Corporate Express Supplier Part #: AAA ETA (Days): 0	Corporate Express Secure Catalog Link	<input type="button" value="Buy from Supplier"/> <input type="button" value="Add to Favorites"/>
VWR Punchout Catalog* Supplier: VWR Supplier Part #: AAA ETA (Days): 0	VWR Punchout Catalog	<input type="button" value="Buy from Supplier"/> <input type="button" value="Add to Favorites"/>
Dell Computer Corporation* Supplier: Dell Computer Corporation Supplier Part #: AAA ETA (Days): 0	Dell Computer Corporation	<input type="button" value="Buy from Supplier"/> <input type="button" value="Add to Favorites"/>
Bank & Office Interiors - Steelcase* Supplier: Bank & Office Supplier Part #: AAA ETA (Days): 1	Bank & Office Interiors - Steelcase	<input type="button" value="Buy from Supplier"/> <input type="button" value="Add to Favorites"/>

*indicates Punchout Catalog items or suppliers with Punchout Catalogs.

3. Once the needed item is located, select the “Add to Cart” button:

Explore Catalog

Search In: [Entire Catalog](#) > [Janitorial Supplies](#) > [Food Services Supplies](#) > Disposable Dish

Keywords (Or):

Exact Phrase: Favorites:

Supplier Part #: Supplier:

Mfg. Part #: Manufacturer:

Price: To: Type Name:

ETA (Days): To:

1 items found Show Results: View By:

1 items found in: [Janitorial Supplies](#) > [Food Services Supplies](#) > **Disposable Dish**

[PLATE FOOD 9" HEAVY WGT WHITE](#)

Supplier: [University Stores](#)
Supplier Part #: 0412158
ETA (Days): 0

PLATE, FOOD, 9", HEAVY WEIGHT, WHITE,
CLAY COATING, 500 EA/CS **DIXIE **SX9AC
**UNISOURCE **37A2176 **

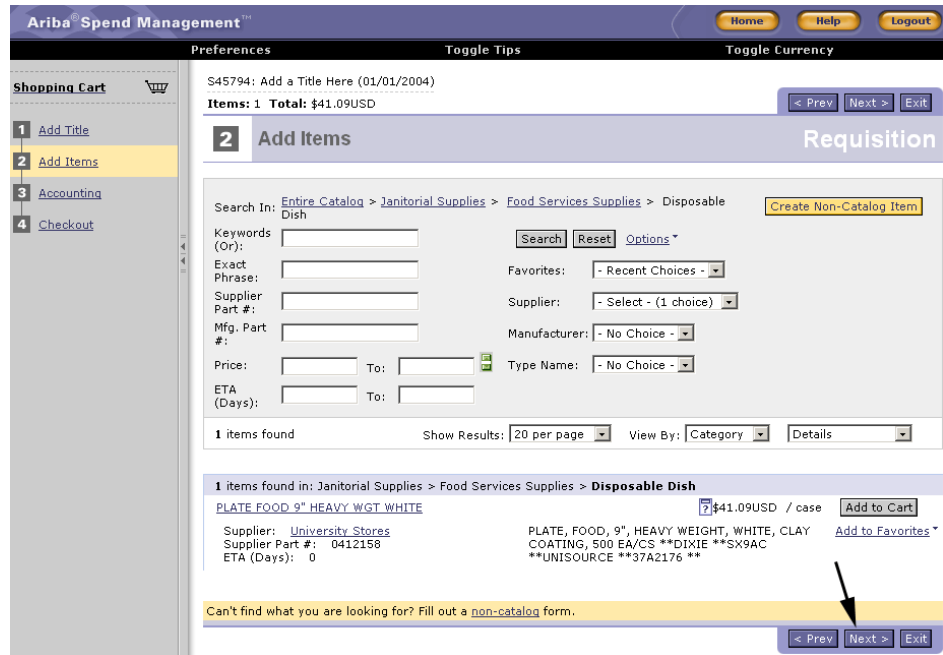
- Additional information about the item can be viewed by selecting the item description, which will be underlined and written in blue.
- When viewing the additional information, the user may sometimes be able to view a picture of the item by selecting the link to the right of “Info” as pictured below:

PLATE FOOD 9" HEAVY WGT WHITE		\$41.09USD / case
Product Details:	Add to Cart Add to Favorites *	
Product:	PLATE, FOOD, 9", HEAVY WEIGHT, WHITE, CLAY COATING, 500 EA/CS **DIXIE **SX9AC **UNISOURCE **37A2176 **	
Supplier:	University Stores	
Supplier Part #:	0412158	
Manufacturer:		
Mfg. Part #:		
ETA (Days):	0	
Info.:	https://eps.admin.washington.edu/storesimages/12/0412158.jpg	
Man. Info.:		

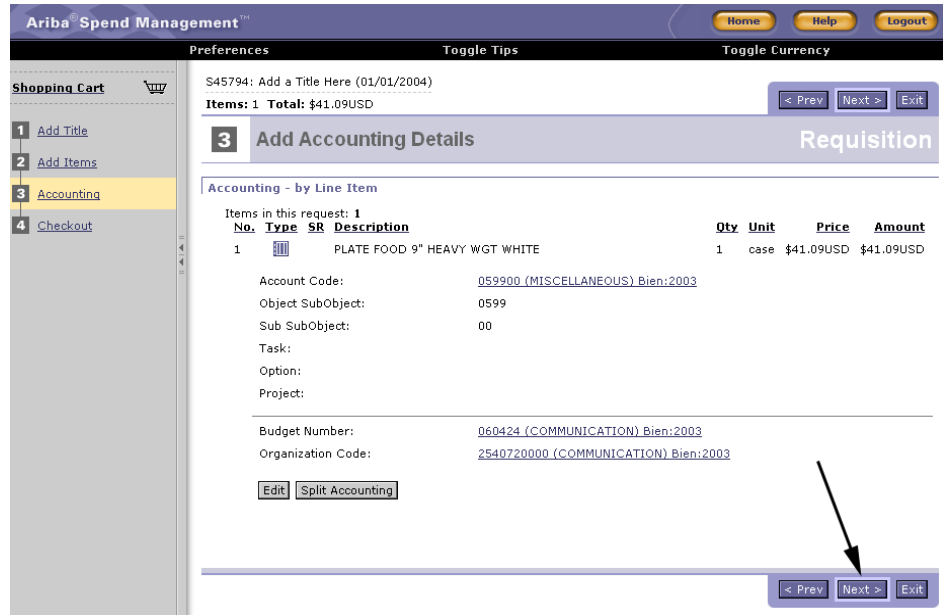
- Once the desired items have been added to the shopping cart, completion of the order begins with adding a title to the order, if the Enterer has not already done so (the eProcurement ordering system will ask for a title the first time an item is added to the Cart).

The title may be anything that will help identify the order for the Enterer and the Approver. It is recommended that, at a minimum, the Enterer's name or initials, as well as the date be entered as a title. The purpose of the order may be added as well, such as "Paper for Local Printer." Select "Next" to view all items in the Shopping Cart.

- Verify the contents of the Shopping Cart. The user will also be able to continue adding items to the Cart by browsing or searching. If additional items are not needed, proceed with checkout by selecting "Next":



- Verify the budget number being charged, which is based on the Enterer's default budget number. Add additional budget numbers using "Split Accounting" if necessary. If the budget number being charged is appropriate, proceed by selecting "Next":



Note: If it is necessary to change the budget number being charged, select the "Edit" button on the lower left. This will take you to the Edit Line Item Accounting screen:

S45794: Add a Title Here (01/01/2004)

Items: 1 Total: \$41.09USD

OK Cancel

4 Edit Line Item Accounting

Requisition

Line Item: PLATE, FOOD, 9", HEAVY WEIGHT, WHITE, CLAY COATING, 500 EA/CS **DIXIE **SX9AC **UNISOURCE
**37A2176 **

Account Code: [059900 \(MISCELLANEOUS\) Bien:2003](#)


Object SubObject: 0599

Sub SubObject:

Task:

Option:

Project:

Budget Number: 

Organization Code: [5100001000 \(BR-B DEAN'S OFFICE\) Bien:2003](#)

OK Cancel

To select another budget number, click on the drop-down arrow to the right of "Budget Number," enter the budget number the user is searching for, select it and choose "OK" at the bottom of the screen. This will take the user back to the "Add Accounting Details" screen. Select "Next" to proceed.

7. The Enterer will have the opportunity to verify the contents of the Shopping Cart, including the budget numbers used, ship-to address, and add additional comments on the following screen:

8. The final step in the order submission process is to select the “Submit” button. This will move the order from Composing status to Submitted. The Approver will immediately receive an email, with the subject of the email the same as the title used by the Enterer. The email will include detail on the items within the order, and a link to the eProcurement web site will be included for the Approver to sign-in and Approve, or Deny, the order.

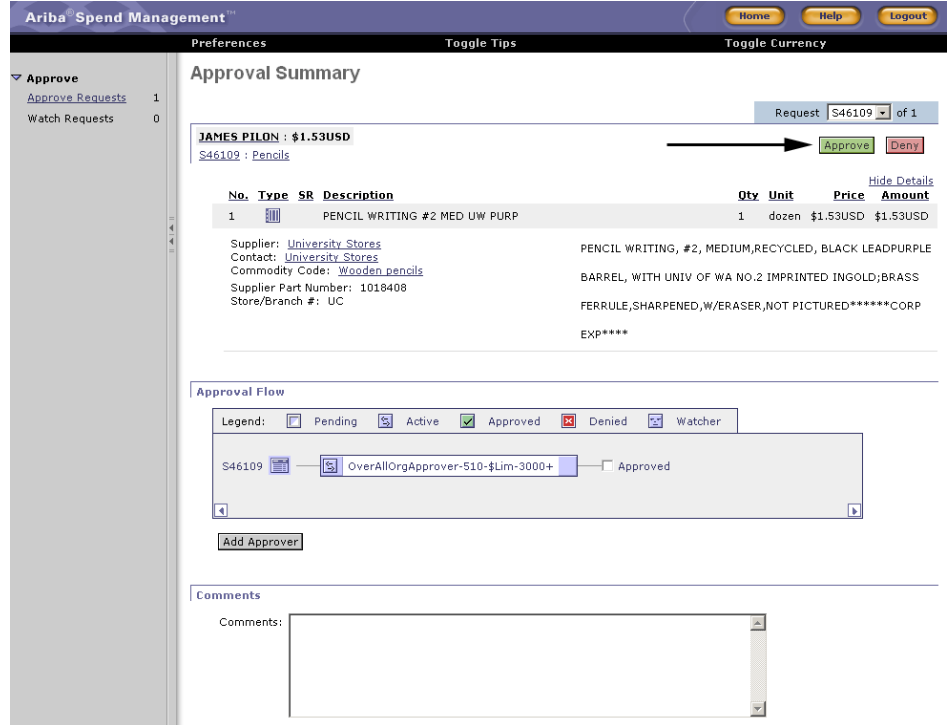
Note that if an order is Denied, it is placed back in pending status, meaning the Enterer may make changes or delete the original order.

Order Approval Process

The Approver will complete the following steps to process the purchase request:

1. Using the email notification, produced automatically when the Enterer completed the order, click on the link at the bottom of the email to approve the order.
2. The link will take the Approver to a sign-in screen, if the user has not already signed in to any UW administrative systems for the day. The UWNNetID and password are required to access the eProcurement system.

The following initial screen will be displayed:



3. The Approver can now Approve or Deny the order. Comments can also be entered at the bottom of the screen. Comments are highly recommended if the order is denied.
4. If the Approver wishes, the budget number used on the order can be reviewed prior to approval, by selecting the SXXXX number (S46109 in the example above). The following screen will appear:

Ariba® Spend Management™

Home Help Logout

Preferences Toggle Tips Toggle Currency

Approve Needs Approval 1

S46109 - Pencils

Status: Submitted

Back Approve Deny Print

Summary Approval Flow Orders History

Title: Pencils

Line Items [Hide Details](#)

No.	Type	SR	Description	Qty	Unit	Price	Amount	Action
1			PENCIL WRITING #2 MED UW PURP	1	dozen	\$1.53USD	\$1.53USD	Detail

Supplier: [University Stores](#) PENCIL WRITING, #2, MEDIUM, RECYCLED, BLACK
 Contact: [University Stores](#) LEADPURPLE BARREL, WITH UNIV OF WA NO.2
 Commodity Code: [Wooden pencils](#) IMPRINTED INGOLD; BRASS
 Supplier Part Number: 1018408 FERRULE, SHARPENED, W/ERASER, NOT
 Store/Branch #: UC PICTURED*****CORP EXP*****

Total Cost: \$1.53USD

The Approver would then select the “Detail” button on the far right for each item (each item can be reviewed separately, as each item can be charged to different budget numbers, as well as split to multiple budgets). The following screen will appear when “Detail” is selected:

Requisition Details: View Line Item

S46109: Pencils

Items: 1 Total: \$1.53USD [OK](#)

Line Item Details

No.: 1

Supplier: [University Stores](#)

Supplier Auxiliary Part ID: UC

Description: PENCIL WRITING, #2, MEDIUM, RECYCLED, BLACK
 LEADPURPLE BARREL, WITH UNIV OF WA NO.2
 IMPRINTED INGOLD; BRASS
 FERRULE, SHARPENED, W/ERASER, NOT
 PICTURED*****CORP EXP*****

Quantity: 1

Unit of Measure: dozen

Price: \$1.53USD

Commodity Code: [Wooden pencils](#)

Contact: [University Stores](#)

Additional Data:

Supplier Part Number: 1018408

Store/Branch #: UC

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

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

Accounting - by Line Item

Account Code: [056400 \(OFFICE SUPPLY/PAPER\) Bien:2003](#)

Object SubObject: 0564

Sub SubObject: 00

Task:

Option:

Project:

Budget Number: [060307 \(FINANCE ADMIN-B\) Bien:2003](#)

Organization Code: [5100001000 \(BR-B DEAN'S OFFICE\) Bien:2003](#)

After reviewing the budget number, the user should select “OK.”

5. If the budget number needs to be changed, the Approver should “Deny” the purchase request. This will electronically send the request back to the Enterer.
6. If the budget number used is correct, and no changes need to be made, the Approver should select the green “Approve” button above the line items. This will automatically transmit the order to UW Stores, Corporate Express, etc, immediately.

The order will typically arrive one to two business days later with Stores and Corporate Express, and three to four days later for Dell and VWR. Orders placed with Bank & Office Interiors could take anywhere from three to ten days, depending on their inventory status, delivery schedule, etc.

ADDITIONAL INFORMATION

UW Purchasing and Stores web site:

<http://www.washington.edu/admin/purchstores/>

WB Guide to Setting eProcurement Preferences:

<http://www.washington.edu/admin/purchstores/stores/eprocurement/phase2/preferences.pdf>

UW eProcurement FAQ:

<http://www.washington.edu/admin/purchstores/stores/eprocurement/phase2/faq.html>

Please contact [Finance and Administration Manager](#) with any questions.