

The background features abstract, overlapping green geometric shapes, primarily triangles and polygons, in various shades of green, creating a modern and dynamic visual effect.

PurchasePATH

Placing an Order

March 2018

What is PurchasePATH?

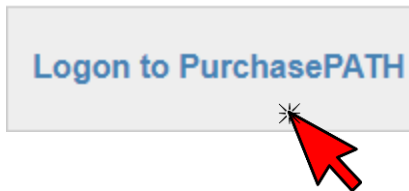
- ▶ It is a web-based ordering system used for:
 - ▶ Order submittal
 - ▶ Order approval
 - ▶ Order receiving
 - ▶ Order tracking
- ▶ All purchases must be submitted through PurchasePath.
- ▶ It does not interface with eProcurement/Ariba.

Logging into PurchasePATH

- ▶ 1) Go to purchasepath.washington.edu



- ▶ 2) Click Logon icon:

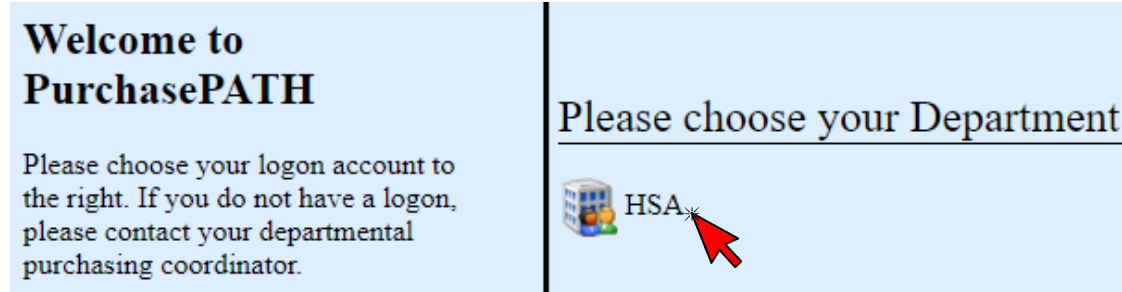


- ▶ 3) Enter UW NetID credentials:

The login form for the University of Washington. It features the 'UNIVERSITY of WASHINGTON' logo at the top. Below the logo, the text 'Please sign in.' is displayed. There are two input fields: 'UW NetID:' and 'Password:'. Below the password field is a blue hyperlink that says 'Forgot your password?'. At the bottom of the form is a 'Sign in' button. A red arrow with a black outline points to the 'Sign in' button.

Navigating to your Division

- ▶ Select HSA as your Department



- ▶ Select YOUR division



- ▶ Note: depending on your position you may have different roles. Select the role that is most appropriate for what you need to do.

Creating an Order: Step 1 of 3

- ▶ For this example: Click on *Create Order* and select *Standard Order*. *most orders will be standard*
- ▶ Then select your *Unit*, your division will likely have multiple units.
- ▶ Then click continue.

Welcome Create Order Products Pending Orders Search Orders

User: Chad Cook ([Change](#)) Global Admin:HSA Quick Search for

Create an Order (step 1 of 3)

Please choose the type of order you wish to create:

Standard Order ▼

Unit: CSS Sandbox / TEST - NPRC

Continue

Creating an Order: Step 2 of 3

- ▶ Fill in the information that doesn't auto populate.
- ▶ Make sure to change the *Delivery Address* if you need the package to arrive somewhere other than your normal/profile location
- ▶ Click in the *Date Desired* field to select the desired arrival date for the package.
- ▶ In the *Ship Instructions* field, select *Standard* if the order is not a rush.
- ▶ Click *Continue*.

Create an Order (step 2 of 3)

Next we need some information about the order:

Attention:

Box Number:

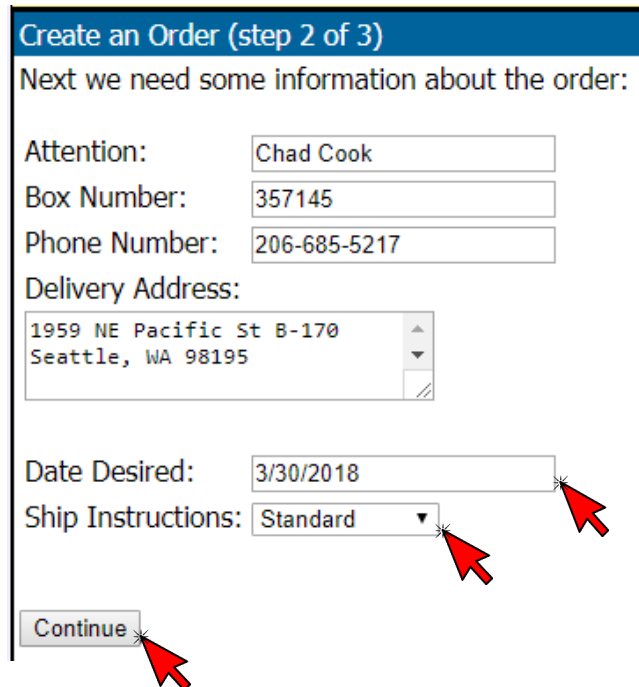
Phone Number:

Delivery Address:

Seattle, WA 98195

Date Desired:

Ship Instructions:



Creating an Order: Step 3 of 3

- ▶ Type in a short name of your vendor. In this example we'll do Office Depot. Click Go!
- ▶ Select the vendor that looks most complete.
- ▶ Then click 'Use' for the vendor you want.

Find a Vendor

Didn't find what you wanted? Search again:

office depot

Go!

[Continue without choosing a vendor for the order](#)







Your department/division may allow you to submit an order without a vendor. This is useful for orders you want to go to bid or you want your purchasing agent to choose the best vendor for you.

Search Results: Choose a Vendor

	<u>Vendor ID</u>	<u>Name</u>	<u>Address</u>	<u>Phone</u>
USE	169302-01	Office Depot	4900 25th Ave NE Seattle, Washington 98105	206-587-2582
USE	169302-01	Office Depot (eProcure)	4900 25th Ave NE Seattle, WA 98105	
USE		officedepot.com	officedepot.com ,	

Verify info:

- Take a quick glance across the top of the screen to make sure all your information came through as intended.

Vendor  Vendor ID: 169302-01 Office Depot 4900 25th Ave NE Seattle, Washington 98105 206-587-2582 (More...)	Delivery  Chad Cook 1959 NE Pacific St B-170 Seattle, WA 98195 Phone: 206-685-5217 Box: 357145 Desired By: 03/30/2018 Shipping: Standard 	General Info  From: Chad Cook  TEST - NPRC of CSS Sandbox (Change Unit) Date: Mar 13, 2018 Purchasing Agent: No Purchasing Agent () Attachments: (Attach a file)	Approvals & Notes Approvals can be added after an order is submitted. Order Notes: (Add a Note)
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Add in a Line Item:

- Click “Add a Line Item”

Product Number Requester	Description	Qty.	Unit Size	Unit Price	Budget(s)	Total Price
Add a Line Item						
Budget Totals Object Code Totals		Sub-Total: \$0.00				
Budget/Object Code Totals		Tax: (10.1%) \$0.00				
		Shipping: \$0.00 (w/tax: 0.00)				
		Grand Total: \$0.00				

- If you know the Number you can search, if the item doesn't return in the list, you can 'Add New Item'.

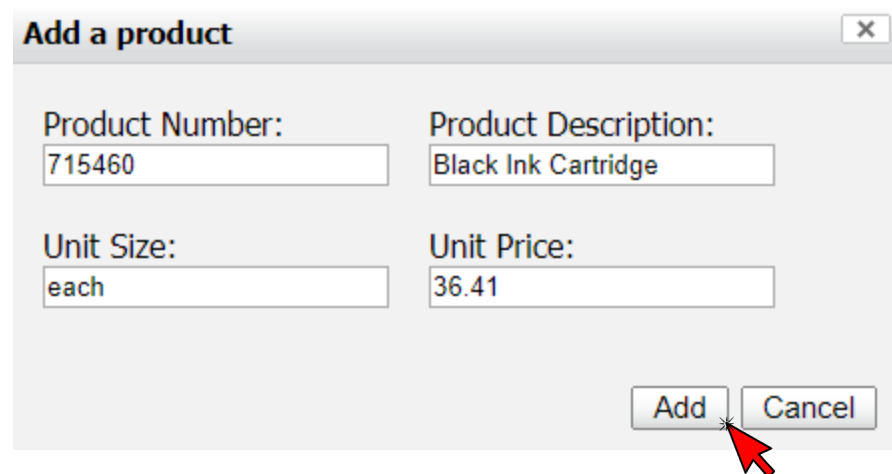
Choose a product

Number: * Description:

Number	Description	Unit Size	Price
No records found.			

Adding a new product

- ▶ After you click 'Add New Item' - you will be able to enter the following:
 - ▶ Product Number
 - ▶ Product Description
 - ▶ Unit Size
 - ▶ Unit Price



Add a product

Product Number:	Product Description:
715460	Black Ink Cartridge
Unit Size:	Unit Price:
each	36.41

Add Cancel

- ▶ Once you've complete each field click 'Add'
- ▶ Note the size is the vendor unit for the item.
 - ▶ For other items you might enter: 20/case, 2 pack, box of 250, etc.

Product Category & Object code

- You can select product category to assign object / sub-object code

Line Item Tools

Product #: 715460
Description: Black Ink Cartridge

Quantity	Unit Size
1	each

Unit Price	Total
36.41	\$40.09

Product Category

- Chemicals and Chemical Products (05-31)
- Computer Equip \$2000-\$4999 (06-10)
- Computing Equip incl software > \$5000 (06-11)
- Computing Supplies (Consumable) (05-43)
- Conference Room Rental (03-91)
- Contractual Services -- misc (03-99)

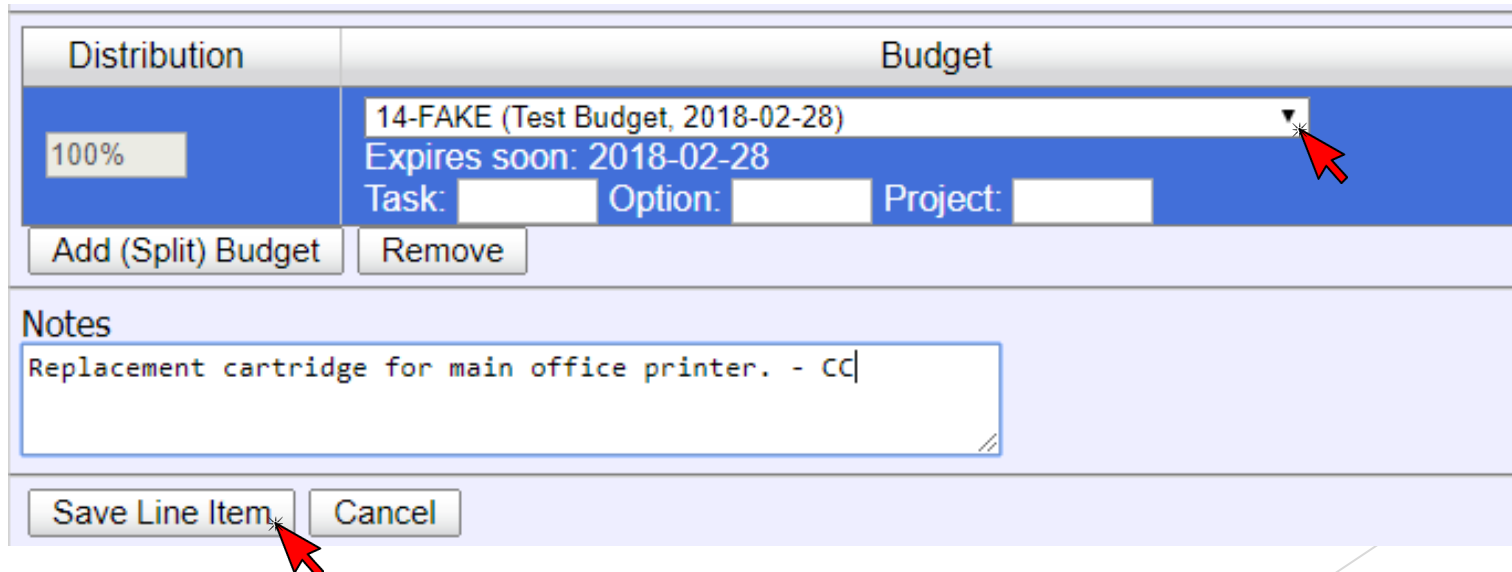
Object Code:
05: Supplies and Materials

Sub Object Code:
05-43: Computing Supplies (Consumable)

Sub-Sub Object Code:

Selecting Budget & TOP codes & Notes

- ▶ Below the Product Category & Object code section, you can select your budget from the drop down menu.
- ▶ Check with your finance or budget manager to see if there are special task, option, or project codes you should be entering.
- ▶ Feel free to add a note that may help the Purchasing Agent and/or reconciler.
- ▶ Click 'Save Line Item'.



The screenshot shows a software interface with a light blue background. At the top, there are two tabs: 'Distribution' and 'Budget'. The 'Budget' tab is selected. Below the tabs, there is a blue rectangular area containing a dropdown menu with the text '14-FAKE (Test Budget, 2018-02-28)'. Below the dropdown, it says 'Expires soon: 2018-02-28'. There are three input fields labeled 'Task:', 'Option:', and 'Project:'. Below these fields are two buttons: 'Add (Split) Budget' and 'Remove'. Below the blue area is a section labeled 'Notes' with a text input field containing the text 'Replacement cartridge for main office printer. - CC'. At the bottom of the interface are two buttons: 'Save Line Item' and 'Cancel'. A red arrow points to the 'Save Line Item' button.

Distribution	Budget
100%	14-FAKE (Test Budget, 2018-02-28) Expires soon: 2018-02-28 Task: <input type="text"/> Option: <input type="text"/> Project: <input type="text"/>

Add (Split) Budget Remove

Notes

Replacement cartridge for main office printer. - CC

Save Line Item Cancel

Before submitting your order

- ▶ Add any other items you want to be placed with the vendor.
- ▶ Add any additional notes you want to the top of the order.
- ▶ Then Click 'Submit Order for Purchase'.

Approvals & Notes

Approvals can be added after an order is submitted.


Order Notes:

Please use coupon if there on available.

-CC

-Chad Cook, 03/13/2018

[\[Add a Note\]](#)



Options

Status: This order is currently not submitted to purchasing.

[Submit Order For Purchase](#)

[Change Vendor](#)

[Edit Delivery Information](#)

[Edit Office Use Information](#)

[Delete this order](#)

[Add a new line item](#)

[Edit Additional Data](#)

[Attach a File to this order](#)

[Add a Note to this order](#)

[Show Order History](#)

[Print Order](#)

[Print Receiving Report](#)

- ▶ Check 'Make this order urgent' if it truly is urgent.
- ▶ Click 'Ok'.

Submit this order for Purchase?

Once you submit the order, you will no longer be able to edit it.

☐ Make this order urgent

☐ I am logging this order, bypass department purchasing

OK

Cancel



Adding Approval & Notes

- ▶ All orders will need an approver - most units will have approvers defined by item type, budget, amount, or other defined rules in PurchasePATH.