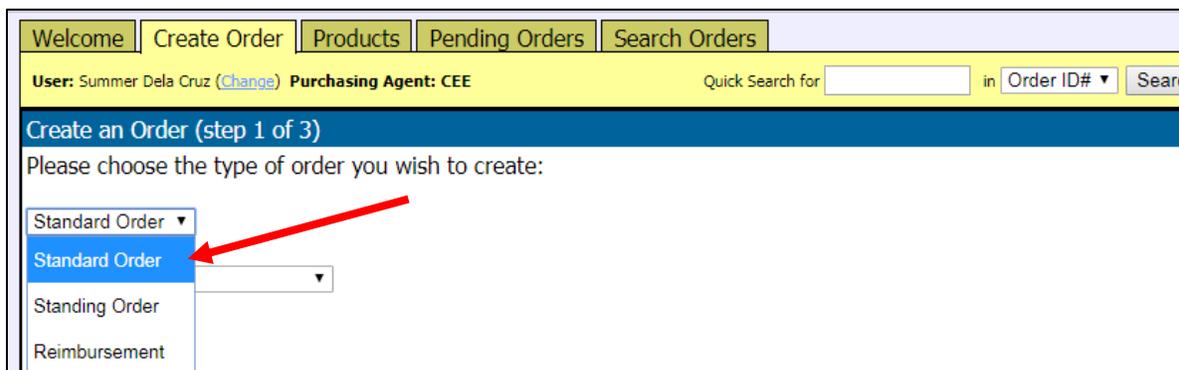


# PurchasePATH

## Request to Purchase Item(s)

*This guide should be referenced if you are requesting the CEE Fiscal Office to place an order on your behalf.*

1. Log in to [PurchasePath](#)
2. Select **Standard Order** from down menu



Welcome | Create Order | Products | Pending Orders | Search Orders

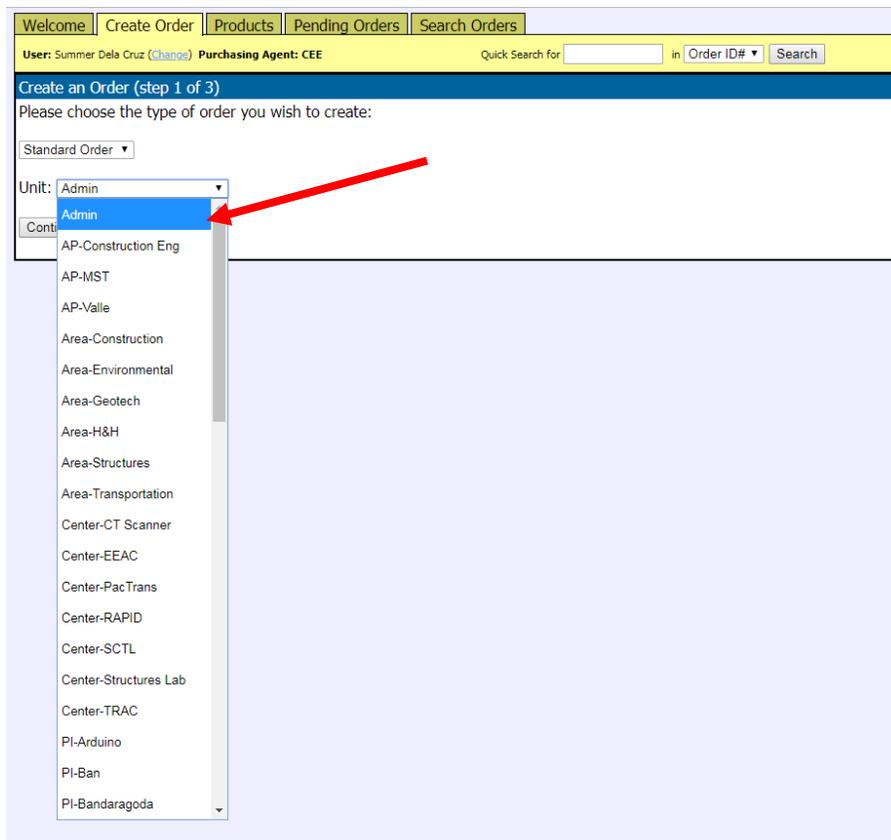
User: Summer Dela Cruz ([Change](#)) Purchasing Agent: CEE Quick Search for  in Order ID#  Search

Create an Order (step 1 of 3)

Please choose the type of order you wish to create:

Standard Order ▼  
Standard Order  
Standing Order  
Reimbursement

3. Select appropriate "Unit"



Welcome | Create Order | Products | Pending Orders | Search Orders

User: Summer Dela Cruz ([Change](#)) Purchasing Agent: CEE Quick Search for  in Order ID#  Search

Create an Order (step 1 of 3)

Please choose the type of order you wish to create:

Standard Order ▼

Unit: Admin ▼  
Admin  
AP-Construction Eng  
AP-MST  
AP-Valle  
Area-Construction  
Area-Environmental  
Area-Geotech  
Area-H&H  
Area-Structures  
Area-Transportation  
Center-CT Scanner  
Center-EEAC  
Center-PacTrans  
Center-RAPID  
Center-SCTL  
Center-Structures Lab  
Center-TRAC  
PI-Arduino  
PI-Ban  
PI-Bandaragoda

4. Click **Continue**.

5. Fill in the fields as directed, and click **Continue**. This information is used for delivery.

<b>Attention</b>	Prefilled or Enter name of person receiving item.
<b>Box Number</b>	Prefilled or leave blank
<b>Phone Number</b>	Prefilled or enter contact phone number for purchasing and delivery questions
<b>Delivery Address</b>	Prefilled or leave blank
<b>Date Desired</b>	Delivery Date you need to receive the item
<b>Ship Instructions</b>	Select appropriate option from drop down menu

## SAMPLE

Welcome | Create Order | Products | Pending Orders | Search Orders

User: Summer Dela Cruz (Change) Purchasing Agent: CEE Quick Search for  in Order ID#

### Create an Order (step 2 of 3)

Next we need some information about the order:

Attention:

Box Number:

Phone Number:

Delivery Address:

Date Desired:

Ship Instructions:



6. Type in the **Name of Vendor** and click **Go!**

Welcome | Create Order | Products | Pending Orders | Search Orders | Change Order

User: Summer Dela Cruz (Change) Purchasing Agent: CEE Quick Search for  in Order ID# ▾ Search

### Find a Vendor

Please type in the name of the Vendor:

7. Select the appropriate vendor from the list by clicking on **USE** → Continue to Step 10.  
**If vendor is not on the list** → Continue to next step (Step 8).

Search Results: Choose a Vendor

	Vendor ID	Name	Address
<input type="button" value="USE"/>		McMaster-Carr Supply Co (eP)	P.O. Box 54960 Los Angeles, CA 90054-0960
<input type="button" value="USE"/>		McmasterCarr	9630 Norwalk Blvd. Santa Fe Springs, CA 90670-2932

8. Click on **Add a new one.**

Search Results: Choose a Vendor

**Vendor ID**

---

**Vendor not on this list?**

9. Enter as much information as possible about the vendor and click on **Add Vendor.**

Welcome | Create Order | Products | Pending Orders | Search Orders | Change Order

User: Summer Dela Cruz (Change) Purchasing Agent: CEE Quick Search for  in Order ID# ▾ Search

### Add a new vendor

**Vendor Name:**

**Phone:**

**Fax:**

**Address:**

**City:**

**State:**

**Zip:**

**Web Address:**

10. If you received a quote (or want to attach other relevant documentation) for the item you are requesting, in the **General Info** section, attach file by clicking on **[Attach a File]**.

<b>Vendor</b> Vendor ID: <b>McMaster-Carr Supply Co (eP)</b> P.O. Box 54960  Los Angeles, CA 90054-0960 (562) 692-5911  (More...)	<b>Delivery</b> <b>Summer Dela Cruz</b> More Hall 201F  Phone: 206-616-5338 Box: 352700 Desired By: Shipping:	<b>General Info</b> From: <b>Summer Dela Cruz</b> <b>Admin of CEE</b> (Change Unit) Date: <b>Nov 29, 2018</b>  <b>Purchasing Agent:</b> <b>No Purchasing Agent</b>  <b>Attachments:</b> <a href="#">[Attach a file]</a>	<b>Approvals &amp; Notes</b> Approvals can be added after an order is submitted.  <b>Order Notes:</b> <a href="#">[Add a Note]</a>
---	--	---	--

11. Click on **Choose file**. Find your file and upload.
- Give your file a title.
  - Click **OK**.

**Add a File to the Order**

Attach a document

1. Please choose your file:  
 McMaster 20.00.PNG

2. Give your file a title:  
  
(If you leave this blank, the filename will be used.)

12. In the **Approvals & Notes** section, click on **[Add a Note]**.

<b>Vendor</b> Vendor ID: <b>McMaster-Carr Supply Co (eP)</b> P.O. Box 54960  Los Angeles, CA 90054-0960 (562) 692-5911  (More...)	<b>Delivery</b> <b>Summer Dela Cruz</b> More Hall 201F  Phone: 206-616-5338 Box: 352700 Desired By: Shipping:	<b>General Info</b> From: <b>Summer Dela Cruz</b> <b>Admin of CEE</b> (Change Unit) Date: <b>Nov 29, 2018</b>  <b>Purchasing Agent:</b> <b>No Purchasing Agent</b>  <b>Attachments:</b> <a href="#">[Attach a file]</a>	<b>Approvals &amp; Notes</b> Approvals can be added after an order is submitted.  <b>Order Notes:</b> <a href="#">[Add a Note]</a>
---	--	---	--

13. In the **Add Notes** box, include Business Purpose and click **OK**.

**Add Notes**

Please enter notes about the order. Your name and date/time will be logged with the note.

Grinding wheels and spring for limit sensor.

OK Cancel

14. Click **Add a Line Item**.

Welcome | Create Order | Products | Pending Orders | Search Orders | Edit Order

Uyen Summer Dela Cruz (Sales) Purchasing Agent: CEE Quick Search for: in Order (CE) Search

Pending Orders: Sort: Date

Order #1004358 - Edit Mode (View)

**Vendor** | **Delivery** | **General Info** | **Approvals & Notes**

Vendor ID: From: Summer Dela Cruz, Admin of CEE (Change User)

Phone: Date: Nov 30, 2018

Boo: Purchasing Agent: No Purchasing Agent (W) (Add a Note)

Desired By: Shipping: Attachments: (Attach a file)

Order Notes: Approvals can be added after an order is submitted.

**Add a Line Item**

**WARNING: The lab is not finished with this request.**

Product Number	Description	Qty.	Unit Size	Unit Price	Budget(s)	Total Price
	Add a Line Item					

Budget Totals Object Code Totals Budget/Object Code Totals

Sub-Total: \$0.00  
Tax: (10.1%) \$0.00  
Shipping: \$0.00 (w/tax: 0.00)  
Grand Total: \$0.00

**Office Use**

PO Number	Shipping Charges	Expected Delivery Date	Vendor Contact	Vendor Reference No.

**Options**

Status: This order is currently not submitted to purchasing.

Add a new line item Change Vendor  
Edit Additional Data Edit Delivery Information  
Edit Office Use Information Delete this order

Attach a File to this order  
Add a Note to this order  
Show Order History  
Print Order  
Print Receiving Report  
Return to Pending Orders

15. Enter in the item in the description field and click **Search**.

**Choose a product**

Number: Description: grinding wheels Search

Number	Description	Unit Size	Price
No records found.			

Add New Item Select Cancel

16. Click **Add New Item**

The screenshot shows a dialog box titled "Choose a product". At the top, there are two input fields: "Number:" (empty) and "Description:" (containing "laser pointer"). To the right of the description field is a "Search" button. Below these fields is a table with the following headers: "Number", "Description", "Unit Size", and "Price". The table body contains the text "No records found." At the bottom of the dialog box, there are three buttons: "Add New Item", "Select", and "Cancel". A red arrow points to the "Add New Item" button.

17. In the **Add a product** screen, add as much information as possible. If you do not have this information, click **Add**.

The screenshot shows a dialog box titled "Add a product" with a close button (X) in the top right corner. It contains four input fields arranged in a 2x2 grid: "Product Number:" (empty), "Product Description:" (containing "grinding wheels"), "Unit Size:" (empty), and "Unit Price:" (empty). At the bottom right, there are two buttons: "Add" and "Cancel". A red arrow points to the "Add" button.

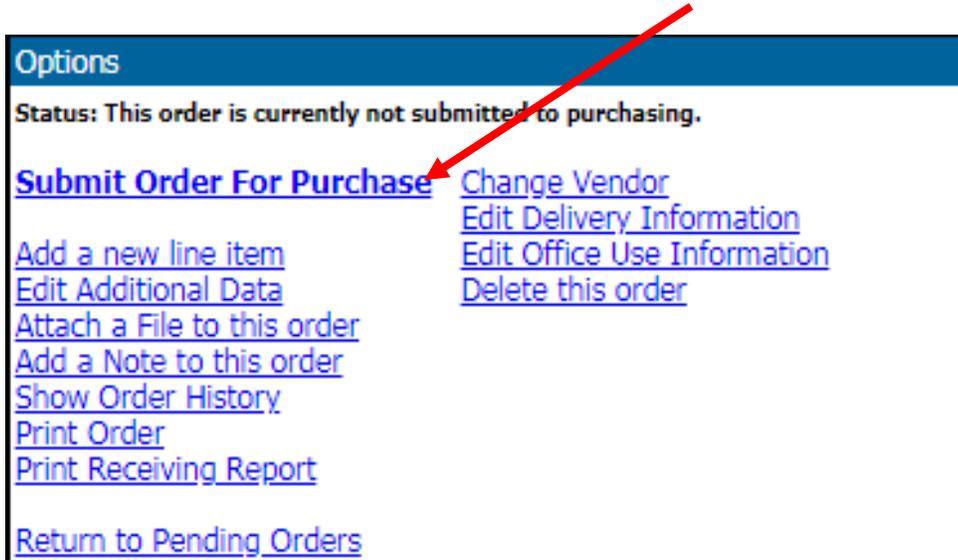
18. Fill in fields as directed below:

<b>Quantity:</b>	Enter quantity needed
<b>Unit Size:</b>	Enter unit (e.g. each, lot, gallons, etc.)
<b>Product Category:</b>	Scroll thru the list. If category is not listed, select "Unspecified."
<b>Unit Price:</b>	Enter cost (per item) before tax
<b>Total:</b>	<i>Automatically calculates tax</i>
<b>Object-Code:</b>	<i>No action needed.</i>
<b>Sub Object Code:</b>	<i>No action needed.</i>
<b>Sub-Sub Obj Code:</b>	<i>Leave blank</i>
<b>Budget / Distrib.</b>	<p>If <b>ONE</b> budget:</p> <ul style="list-style-type: none"> <li>Select appropriate budget from drop down menu.</li> </ul>
	<p>If <b>MORE THAN ONE</b> budget:</p> <ul style="list-style-type: none"> <li>Click <b>Add (Split) Budget.</b> <input type="button" value="Add (Split) Budget"/></li> <li>Select if you want to distribute by <b>Percentage</b> or Distribute by <b>Dollar</b> amount.  <input checked="" type="radio"/> Distribute by Percentage <input type="radio"/> Distribute by Dollar</li> <li>Select appropriate budgets. <b>If budget is not listed in drop-down menu, email tjhanson@uw.edu requesting to add the budget to PurchasePath.</b></li> </ul> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="border: 1px solid blue; padding: 2px;"> 06-1026 (CEE) <span style="float: right;">▼</span>  Task: <input type="text"/> Option: <input type="text"/> Project: <input type="text"/> </div> <div style="border: 1px solid gray; padding: 2px;"> 75-1026 (CEE RCR) <span style="float: right;">▼</span>  Task: <input type="text"/> Option: <input type="text"/> Project: <input type="text"/> </div> </div> <ul style="list-style-type: none"> <li>Assign percentage or dollar amount (based on your selection in bullet 2)</li> </ul> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="border: 1px solid gray; padding: 5px; width: 150px;"> Distribution  <input type="text" value="50%"/>  <input type="text" value="50%"/> </div> <div style="border: 1px solid gray; padding: 5px; width: 150px;"> Distribution  <input type="text" value="\$15.14"/>  <input type="text" value="\$15.14"/> </div> </div>
<b>Notes:</b>	<p><b>Include detailed item description or any important information (e.g. link to online catalog).</b></p> <div style="border: 1px solid gray; padding: 10px; margin-top: 10px;"> <p><b>Notes</b></p> <p>Grinding wheels and spring for limit sensor.</p> <p><a href="https://www.amazon.com/grind-wheel/B01033350">https://www.amazon.com/grind-wheel/B01033350</a></p> </div>

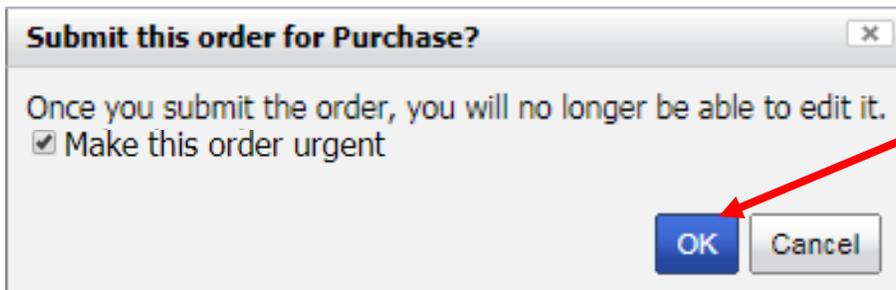
19. Click **Save Line Item.**

Save Line Item

20. Repeat steps 14-19 for each item purchase request.
21. Review all information and line items for accuracy, modify as needed.
22. Click **Submit Order for Purchase**.



23. If this order is an urgent request, check the box for **Make this order urgent** and click **OK**.



24. Your purchase request has been submitted to the CEE Fiscal Office. The Fiscal Office will update the status of your purchase request in PurchasePATH.

Questions:  
Contact the CEE Fiscal Office by:  
Email: [ceefisc@uw.edu](mailto:ceefisc@uw.edu)  
Phone: 206-616-5338 or 206-543-2391