Creating a Blanket Purchase Order for an Exception Item in eProcurement
For this demonstration, we will:

• Create a BPO for painting a UW-owned building
• The painting needs to be completed this summer
• UW Facilities
  • Is short-staffed and will NOT have the resources to do the job and,
  • Has given authorization by email to contract out the services

• We will be using the following information:
  • Effective Date: July 1, 2015
  • Expiration Date: August 31, 2015
  • Final Invoice Date: October 30, 2015
  • Maximum Limit: $9,000.00
  • Commodity Code: Building and Facility Construction and Maintenance Services
  • Quantity: 1
  • Unit of Measure: Lot
  • Account Code: OUT/SV,REPAR/MTN/ALTER (036000)
Before You Begin

• Review the Construction Exception Item requirements on the Procurement Services web page
• Obtain an email authorization from Facilities to contract out these services
• Create a Word or PDF document of the authorization so you can attach it to the BPO
• Be prepared to:
  • Check a box to certify that you have attached the authorization from facilities to contract out these services
  • Answer the question: “Will this contract include the services of individuals providing building construction, maintenance, or repair work, or provide construction-related services, painting, or janitorial services?”
The process of creating a BPO is started by selecting **Contract Request** from the **Create** drop-down menu. A **Contract Request** (CR) starts the process of creating a BPO.

1. Click **Create**

2. Select **Contract Request**
You will be brought to Step 1 **Definitions** of creating the Contract Request. You will need to enter information into multiple fields.
Enter the title of the CR.
Enter a brief description of the order.
The Contact defaults to the preparer. Use the drop-down to change this if you are preparing this request for someone else.

Select Dates:
- **Effective** (Start)
- **Expiration** (End)
- **Final Invoice**
CR1388: Painting for UW Purchasing Building

Enter general requirements or definitions for the contract request, and specify whether the contract type is...

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**DEFINITIONS**

Title: Painting for UW Purchasing Building

Description: Exterior painting for the UW Purchasing Building to be completed during the summer of 2015

Related Contract ID:

Contact: MELANIE MC KAY FIELDS

Effective Date: Wed, 1 Jul, 2015

Expiration Date: Mon, 31 Aug, 2015

Final Invoice Date: Fri, 30 Oct, 2015

Supplier: REDDYGOSOLUTIONS

Supplier Location: (no value) [select]

Ship To: PURCHASING & ACCOUNT

Deliver To: Rm216/mfields

Is this item listed on the exception item list? Yes

**Definition of Exceptions**

Select the Supplier
Select the Supplier Location

CR1388: Painting for UW Purchasing Building

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Is this item listed on the exception item list? Yes

Definition of Exceptions
Enter additional delivery details, such as room number and name into the Deliver To field.

Hint: You can set up default values for Ship To and Deliver To in your User Profile under Preferences.

Use the drop-down arrow to search for and select the Ship To address.

Enter additional delivery details, such as room number and name into the Deliver To field.
Since painting is a Construction Exception Item, click Yes.

The system requires that you answer the question: **Is this item listed on the exception item list?**
The **Exception Item List** field appears.

Click the drop-down arrow.
Is this item listed on the exception item list?  

- Yes  
- No

**Definition of Exceptions**

- Resale Items
- XRay/Lasers
- Charters
- Construction and Building Alteration, Modification, and R...
- Lab Refrigerators/Lab Freezers
- Live Animals, Custom Animal Antibodies, Non-Persevered An...
- Blood, Blood Serum and Platelets
- Radioactive Chemicals/Materials/Equipment
- Firearms, ammunition, explosives
- Cadavers, Organs, and Other Human Tissue

Click **Search for more...**
Locate Construction and Building Alteration, Modification and Repairs, and click **Select**.
Click **Yes** to certify that to the best of your knowledge, the University owns all of the space to be modified.

**IMPORTANT**: Ordering Construction Exception Items in eProcurement has the restriction that the University must own all of the space to be modified. If any of the property is NOT owned by the UW and you answer “No”, the system will issue a message that tells you to STOP and contact UW Real Estate regarding alterations to leased spaces. **Do not use eProcurement to place orders for construction on leased spaces.**
**IMPORTANT**: You must obtain authorization from facilities to contract out construction services and attach the authorization to your request.

Click **Yes** to certify that the authorization from facilities will be attached in the **Appendixes** Section.

**IMPORTANT**: The best practice is to obtain the facilities authorization before you create the BPO. A link to request authorization is provided here if you haven’t done so yet. However, you will need to wait until you receive authorization before you can continue with the request. You can **Exit** and **Save** this request in a Composing status and complete it after you receive authorization.
**IMPORTANT**: If the contract will include the services of individuals providing building construction, maintenance, or repair work, or provide construction-related services, painting, or janitorial services, a Central Office Buyer needs to review the request.

As part of the review, the buyer will inform the supplier of all prevailing wage requirements, determine that the supplier is eligible to perform the required work, and obtain the appropriate intent to pay prevailing wage form.

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**Click Yes** if the contract will include these services of individuals.

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**Important**
Selecting Yes will route the request for approval to Goods&ServicesApproval. The Goods&ServicesApproval buyer will Deny the request if the authorization is not attached.
Click **Next** to continue to set limits for the BPO.

**DEFINITIONS**

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Painting for UW Purchasing Building

**Description:**

Exterior painting for the UW Purchasing Building to be completed during the summer of 2015

**Related Contract ID:**

**Contact:**

MELANIE MC KAY FIELDS

**Effective Date:**

*Wed, 1 Jul, 2015*

**Expiration Date:**

*Mon, 31 Aug, 2015*

**Final Invoice Date:**

*Fri, 30 Oct, 2015*

**Supplier:**

REDYGOSOLUTIONS

**Supplier Location:**

**Ship To:**

**Deliver To:**

Rm216/mfields

**Is this item listed on the exception item list?**

☑ Yes  ☐ No
Step 2 **Limits** is where you will establish the total amount and other parameters of the order.

Enter the **Maximum Limit** for the order. This is the total amount of money that can be spent.

Optionally, you can:
- Specify a Tolerance percentage to accommodate Header charges such as tax and shipping
- Specify that an email notification be sent as a reminder for an approaching contract expiration
- Specify additional users receive notification (in addition to the preparer and contact)
Click Next to continue to add items to the BPO

**MINIMUM COMMITMENT**

Minimum Commitment applies to the entire contract. Notifications are sent when the Amount Spent does not meet the specified percentage of the Minimum Commitment.

**MAXIMUM LIMIT**

Maximum Limit applies to the entire contract. Notifications are sent when the Amount Available does not meet the specified percentage of the Maximum Limit. The Tolerance is the percentage by which you can exceed the Maximum Limit.

- Maximum Limit: 9000 USD
- Tolerance: 0%
- Send notification when Amount Available is at or below: 0%

**ADDITIONAL APPROVERS LIST**

Add additional approvers to the approval flow if a release against the contract does not meet the overall (maximum) or release (minimum or maximum) limits.

**EXPIRATION DATE NOTIFICATION**

Use notifications to give users advance notice that the contract expiration date is approaching.

- Send notification: 0 days before the contract expires
- Re-notify every: 0 days
Step 3 **Pricing Terms** is the section where you will add items to the order.

To start, click on **Add Items**.
Click on create non-catalog item.
Enter the full description of the item.

Choose the **Commodity Code** of Building and Facility Construction and Maintenance Services.
**Add Item Level Pricing Terms**

Describe the non-catalog item and add any available information before leaving the screen.

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Description</td>
<td>Exterior Painting Services for the UW Purchasing Building</td>
</tr>
<tr>
<td>Commodity Code</td>
<td>Building and Facility</td>
</tr>
<tr>
<td>Supplier</td>
<td>REDDYGOSOLUTIONS</td>
</tr>
<tr>
<td>Supplier Auxiliary Part ID</td>
<td></td>
</tr>
<tr>
<td>Supplier Part Number</td>
<td>PaintingServices</td>
</tr>
<tr>
<td>Supplier Auxiliary Part ID</td>
<td></td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>lot</td>
</tr>
<tr>
<td>Negotiated Price</td>
<td>$9,000.00 USD</td>
</tr>
<tr>
<td>Is this M&amp;E item?</td>
<td>Yes/No</td>
</tr>
</tbody>
</table>

Enter the **Supplier Part Number**. If the item has no part number, enter a meaningful term.

Choose the **Unit of Measure**.

Enter the **Negotiated Price** for this service.
Enter the Supplier Part Number. If the item has no part number, enter a meaningful term. Click OK.
In this screen, you will review and provide additional line item details.

Use the drop-down arrow to change the value of **Set Item limits** from Quantity to **Amount**.
For this order, we will enter $9000.00 for the **Maximum Amount**.

Notice that the **Maximum Quantity** field changes to the **Maximum Amount** field as a direct result of changing **Set Item Limits by** to **Amount**.

The **Account Code** of (036000) defaults to the account code associated with the chosen Commodity Code. This is the value you want for this order so leave it as is. (If you wanted to change it, you could perform a search with the drop-down menu to pull the account code needed.)

Since a **Budget Number** is showing, this means you have a default budget set up in your User Profile. You can change this budget. If there was no budget, you could perform a search with the drop-down menu to pull the budget needed.

Click **Done**.
This completes Step 3 **Pricing Terms**. The next step, Milestones, is not utilized by campus at this time.

Click **Next twice** to move to Step 5 **Access Control**.
Step 5 **Access Control** allows you to enter other users who should be able to edit the order besides the Preparer and the Contact. You could click the select link below to search for users and add them as Editing Users.

**EDIT ACCESS**

*Users who are authorized to edit this contract. The requester automatically has edit access.*

Editing Users: (select a value) [select]

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Step 6 **Payment Terms** is not being utilized by campus at this time. To reach Step 7 **Appendixes** to add your attachment, click **Next** twice.
In Step 7 **Appendixes**, you can attach any documents that are relevant for this order. Since ordering a Construction Exception Item requires that you attach authorization from facilities, you should have obtained authorization to contract out these services before placing the order and saved it in a Word or PDF file.

To add the authorization from facilities, click **Add Appendix**.
Choose the file you would like to attach.
Enter a brief description of the attachment.

Since the attachment is for UW internal purposes, do not mark the Visible to Supplier box.

When you are finished, click OK.
Click **Next** to continue to the Summary page.
This will bring you to Step 8 **Summary**. You will be at the bottom of the page.

Scroll up to perform a final review of the contract information you have entered.

There is a box here to add **Comments**.
If everything looks correct, click Submit.
Click View to see the Approval Flow of this request.
In this example, the Budget Approver must approve the request first. You can click on the box to see who is assigned to this role.

**Construction** Exception Items that include services, must be approved by a Central Office **Goods&ServicesApproval** buyer. You can click on the box to see who the approvers are.
You will receive an email notification for each approval. The approval node will turn green and display the name of the approver.
If you do not attach the required documentation, the **Goods&ServicesApproval** buyer will deny the CR. You will receive an email notification telling you that the request has been denied.

<table>
<thead>
<tr>
<th>Legend: Approved</th>
<th>Denied</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Checkmark] MELANIE MC KAY FIELDS (BgtApprover-143750-$Lim-3000+)</td>
<td>![X] KASSANDRA L. ELLEFSON (Goods&amp;ServicesApproval)</td>
</tr>
</tbody>
</table>

If your CR is denied, check the **Comments** section on the **Summary** tab of the CR to determine why. The comment should include any actions you must take before you resubmit the request.
For More Information...

- Visit the Blanket Purchase Ordering and Exception Item Ordering sections of the Procurement Customer Services Website

https://finance.uw.edu/ps/how-to-buy/ariba/blanket-purchase-orders
https://finance.uw.edu/ps/how-to-buy/exception-items