How to Create Household & Laboratory Move BPOs in eProcurement

OBJECTIVE
The purpose of this document is to provide guidance on how to create a Blanket Purchase Order (BPO) in eProcurement for Household and Laboratory moves.

AUDIENCE
This document is for campus users who are handling a Household or Laboratory move, when using the preferred method of Lump Sum Moving Allowance is not possible.

BEFORE YOU START - Important Related Information

Best Practice Recommendation
- The Lump Sum Option is still the **preferred method for all domestic household moves**.
- The BPO option should only be used if the Lump Sum is not an Option.

☐ **Ensure You are Knowledgeable with Policies and Procedures**
Visit the *Household & Laboratory Moves* website at: https://f2.washington.edu/fm/ps/moving-expenses/household-lab-moves

☐ **Complete a Request for Moving Expenses Form**
You must attach a completed **Request for Moving Expenses Form** when you create the BPO. Before you start, fill out the form and have the new employee sign it and return it to you so you can attach the form when you create the **Contract Request**.

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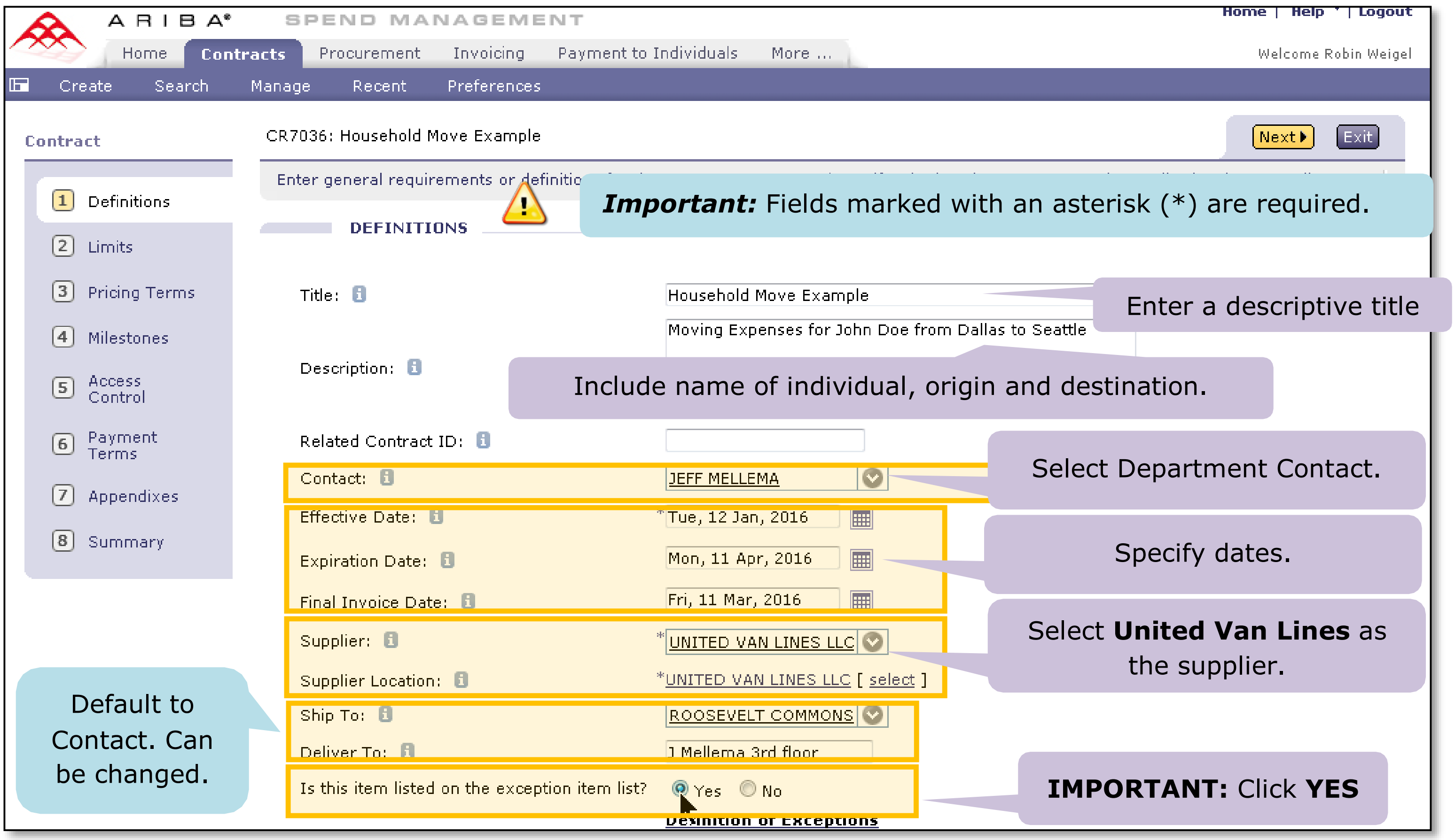
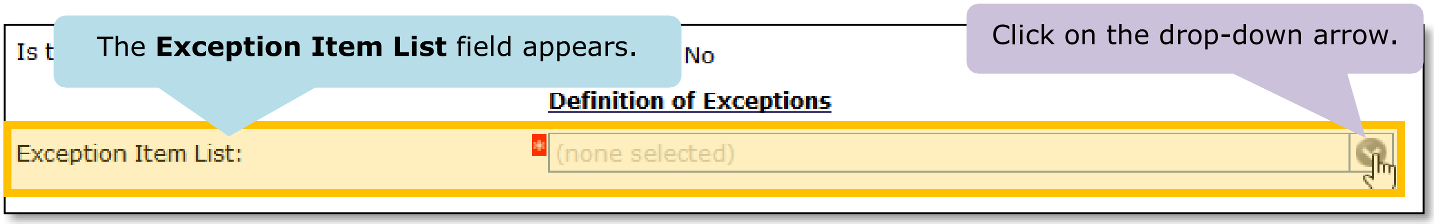
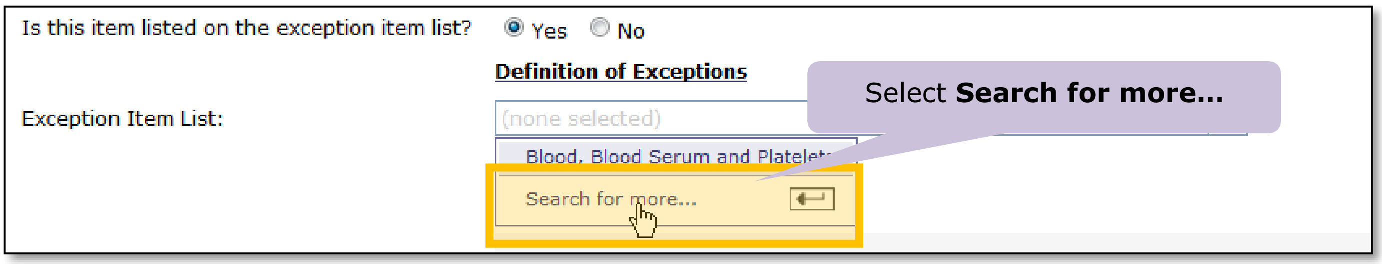
1. Log into eProcurement: https://ar.admin.washington.edu/AribaBuyer/uw/login.asp
2. Click on **Create** -> **Contract Request**.

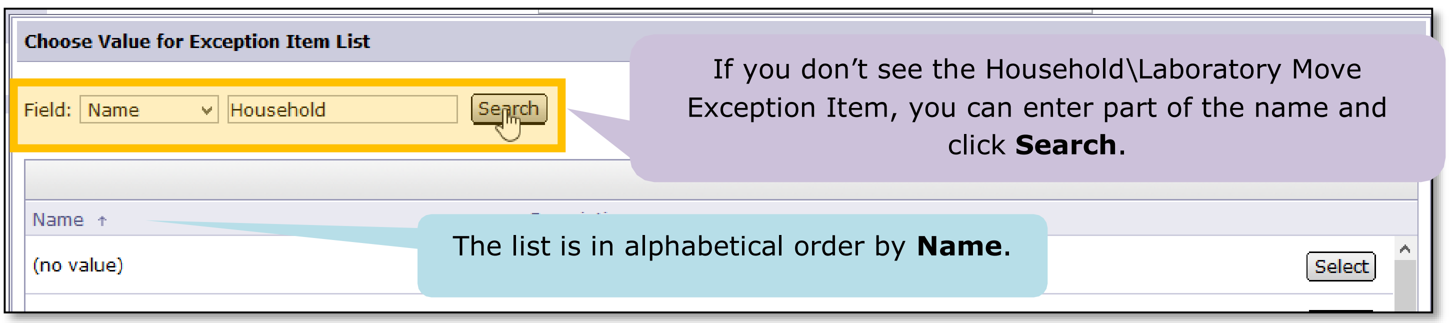
3. Enter the **Definitions** information as pictured in the next several screen captures. Be sure to Answer **Yes** to the question: *Is this item listed on the exception item list?*



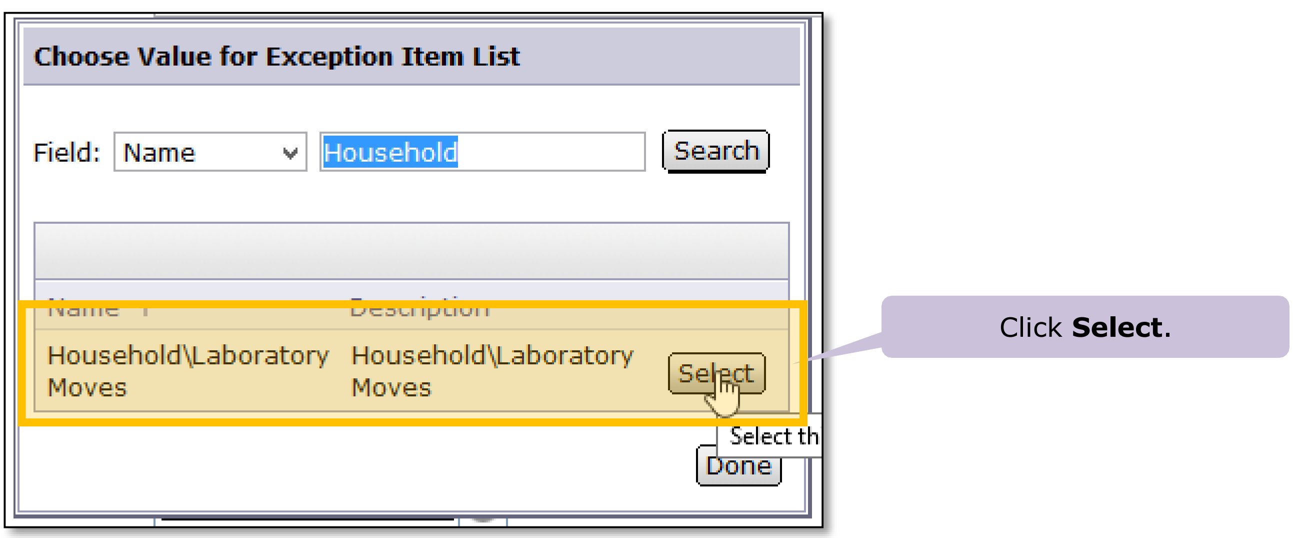
4. The **Exception Item List** field appears. To select the **Household\Laboratory Moves** Exception type, follow the steps in the screen captures below:







5. The search results will return the Household\Laboratory Moves Exception type. Click the **Select** button:



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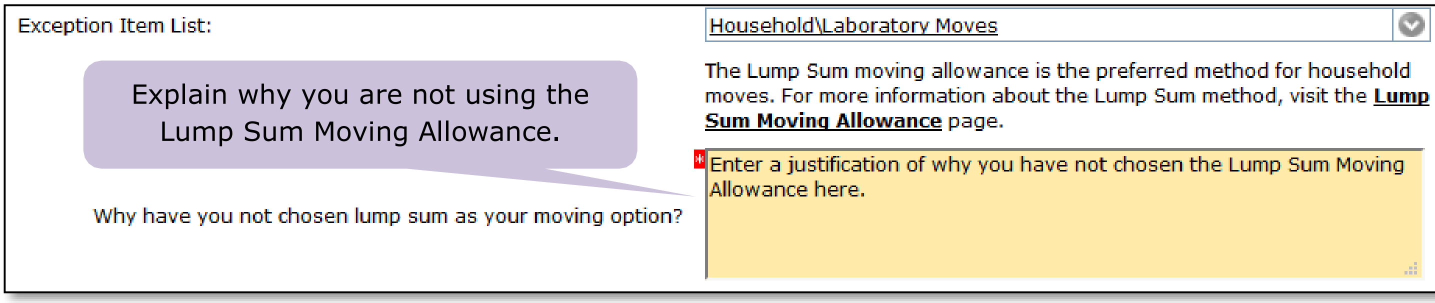
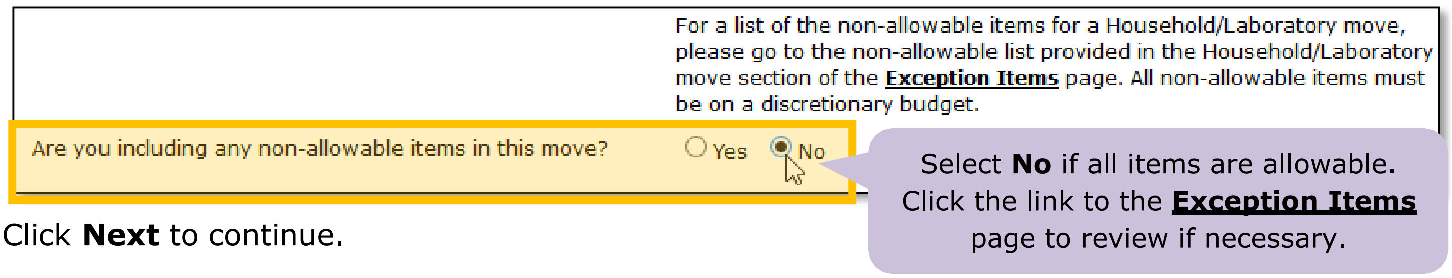
6. Selecting the **Household\Laboratory Moves** exception type generates a prompt to remind you that **Lump Sum moving allowance** is the preferred option. You must answer the question: *Why have you not chosen lump sum as your moving option*?

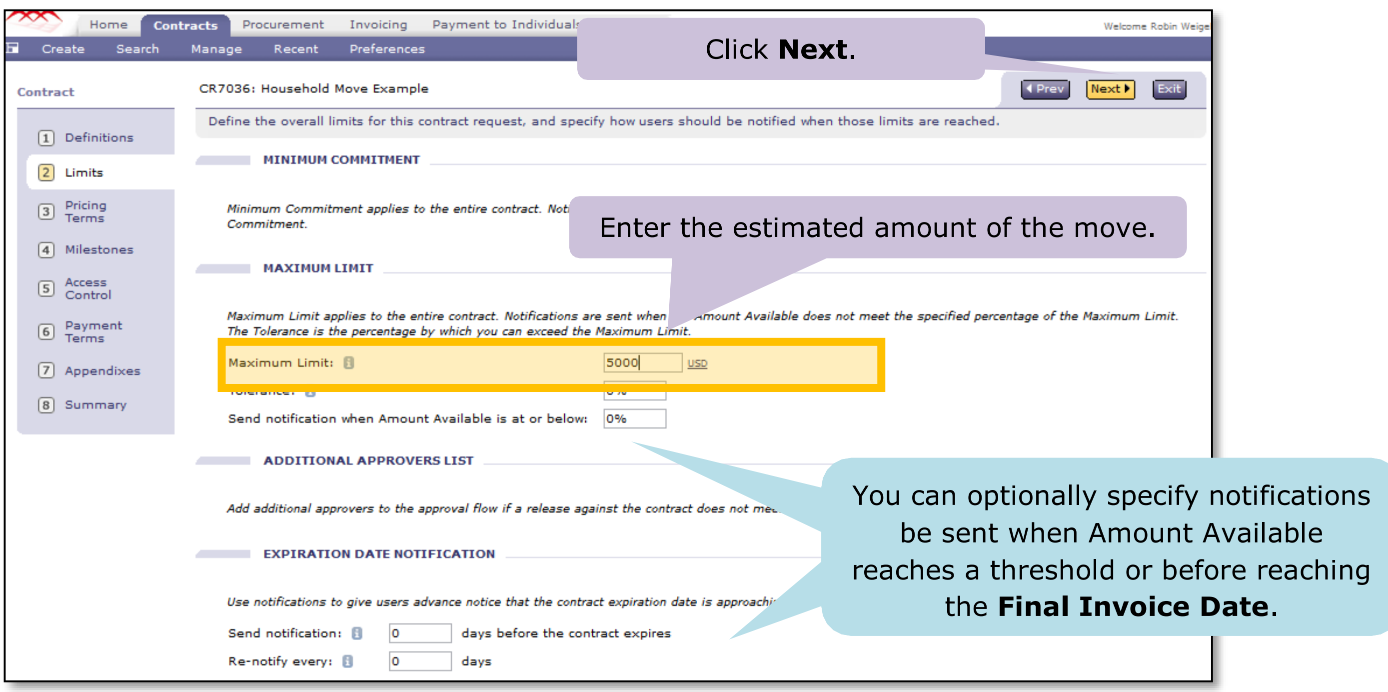


7. You also must answer **Yes** or **No** to the question: *Are you including any non-allowable items in this move?* In this example, there are no non-allowable items. However, if you select **Yes**, you will be prompted to certify that you are using a discretionary budget:

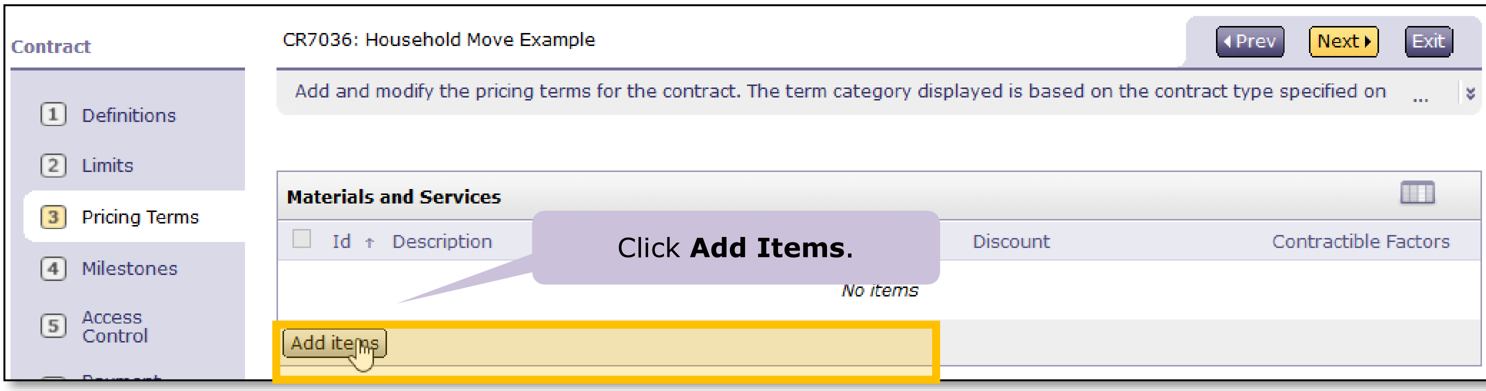


8. Click **Next** to continue.

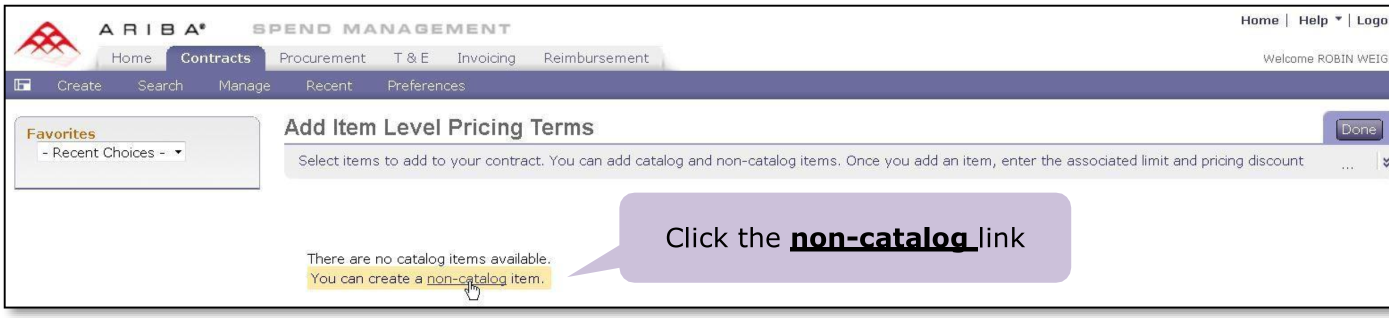
9. On the **Limits** page, enter the estimated amount of the move as the **Maximum Limit**, optionally set-up notifications, and click **Next** to continue:



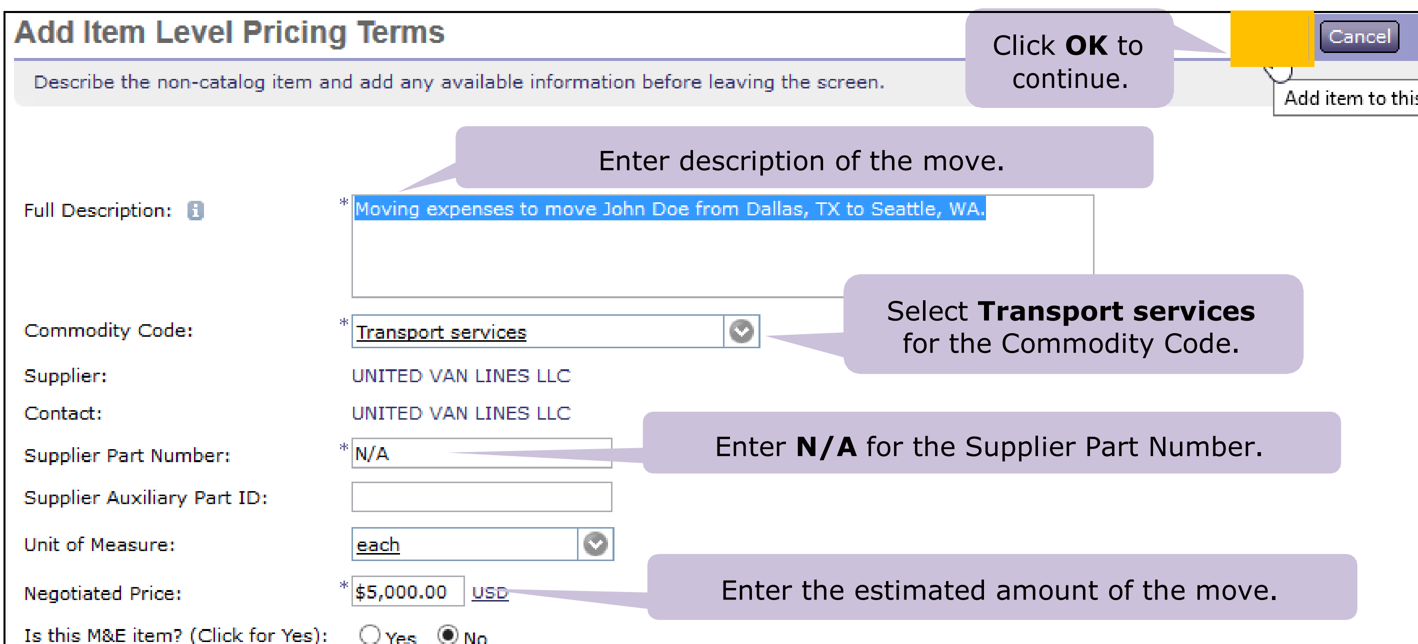
10. In the Pricing Terms step, click Add Items:



11. On the **Add Item Level Pricing Terms** screen you will see a message that there are no catalog items available. If you see this message, then click the non-catalog item link:



12. Enter information that describes the move as illustrated below and click **OK** to continue:



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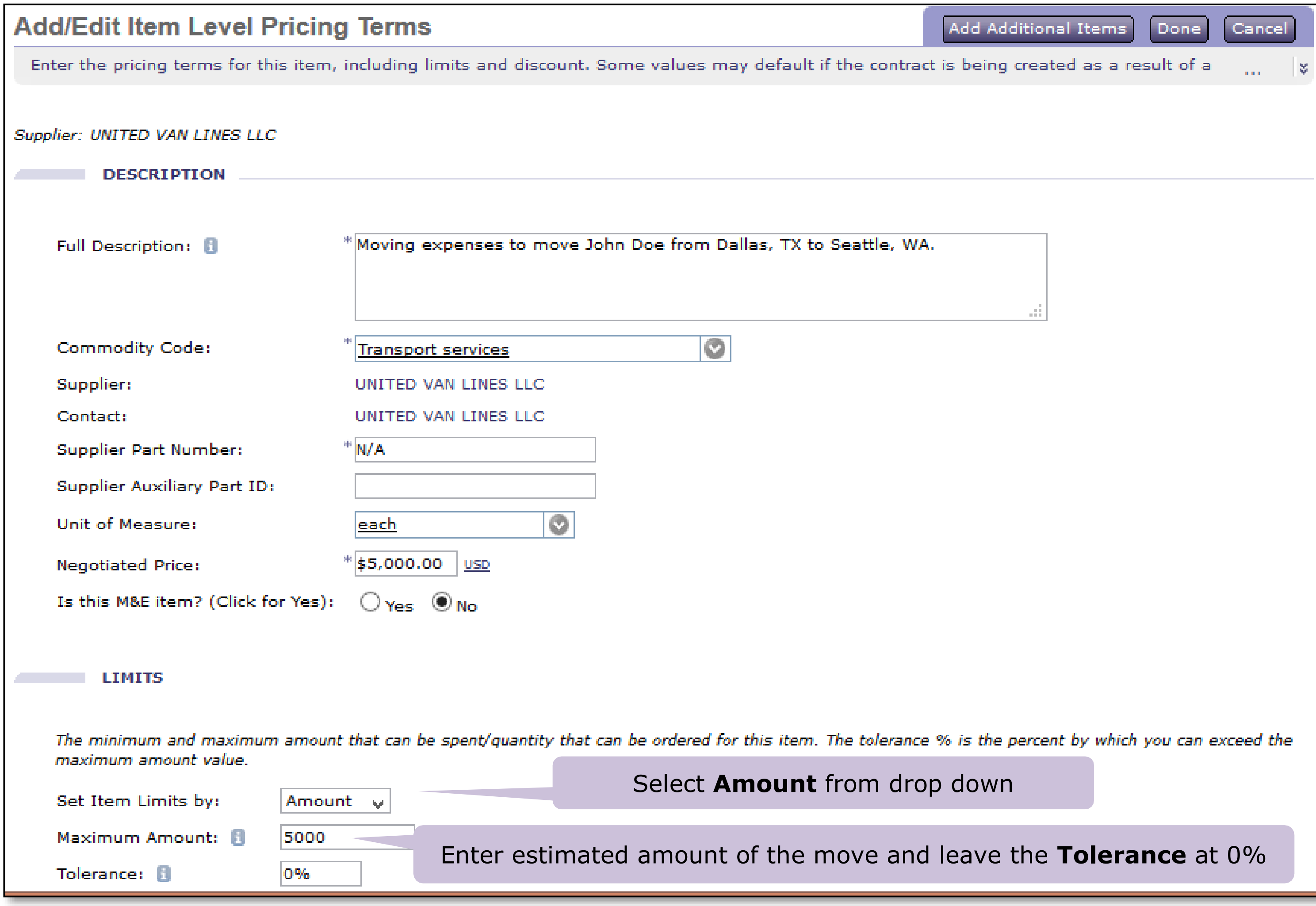
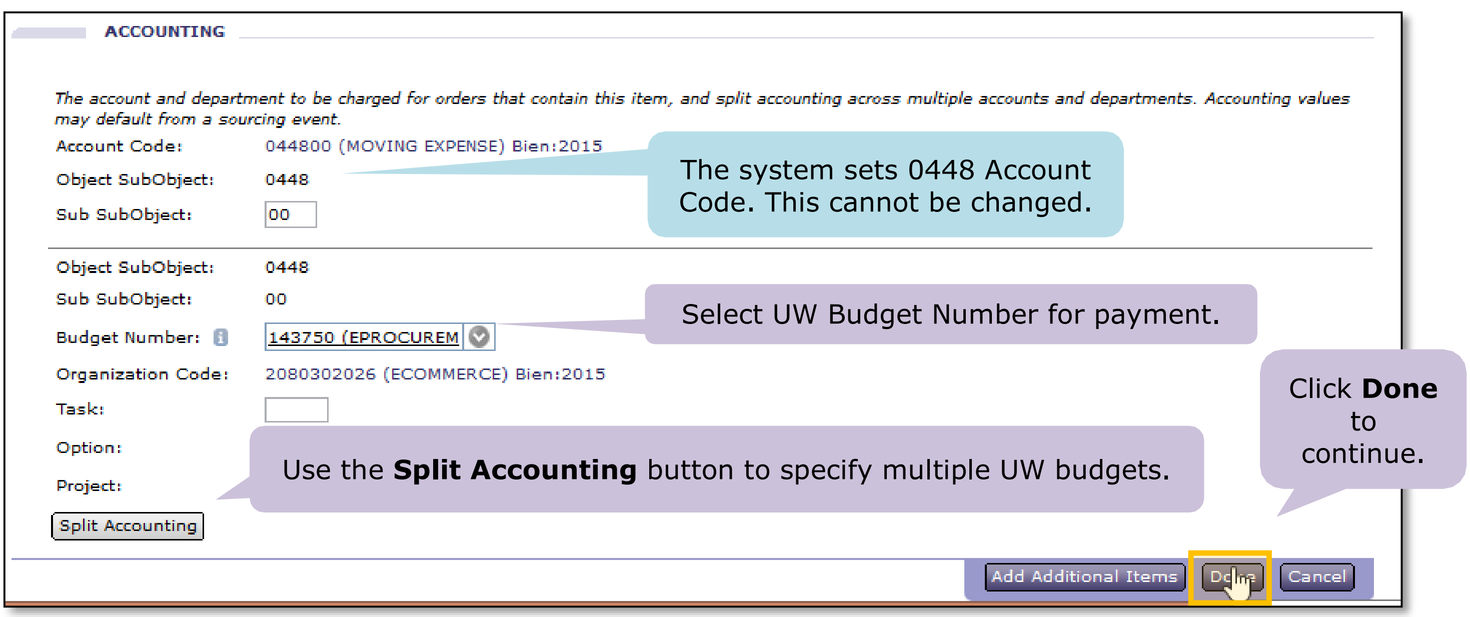
13. The next screen allows you enter more information about the line item:



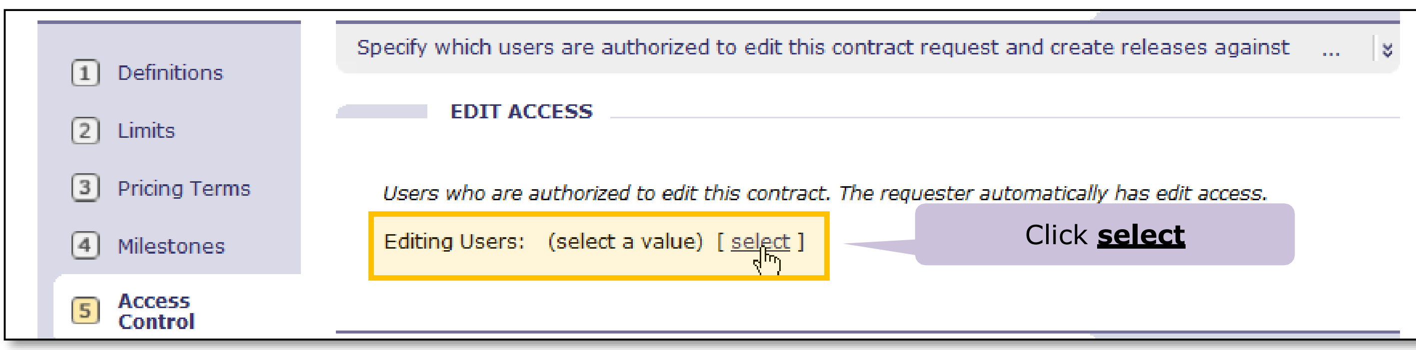
14. Enter UW Budget(s) to be used for payment:



15. Review the line item to ensure accuracy. Click **Next** to continue:

16. Milestones are not used. Click **Next** to continue to *Access Control*.

17. *Access Control* optionally allows you to grant other users the ability to make edits to the CR after it is fully approved. To do this, click the **select** link on the *Access Control* screen:



18. You can search by name or select email as the search field and search by UW Net ID. Click the checkboxes next to the names of those to whom you want to give Edit Access. Click **Done** and then click **Next** to continue.

19. You cannot change the **Payment Terms**, so click **Next** to continue.

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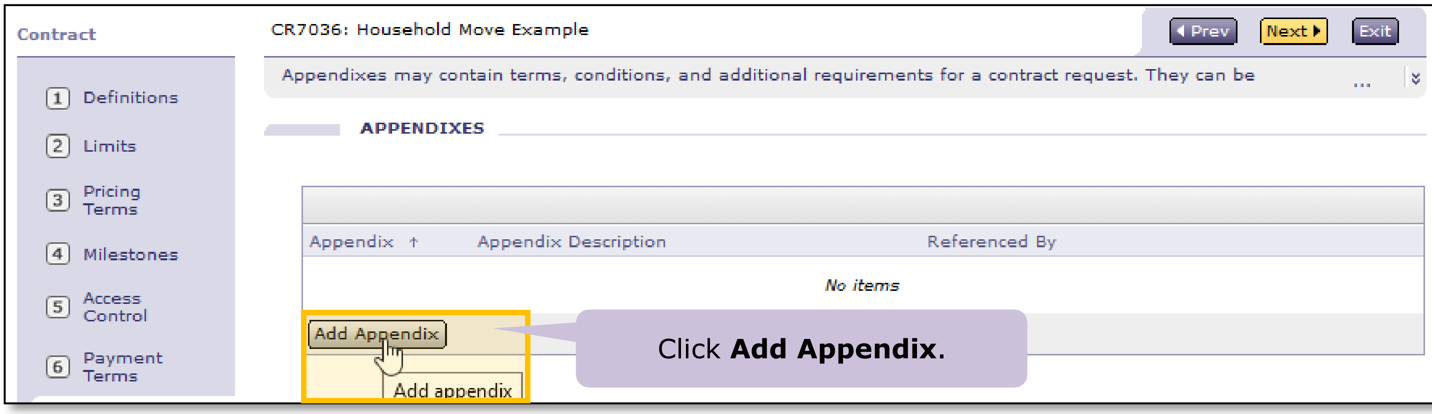
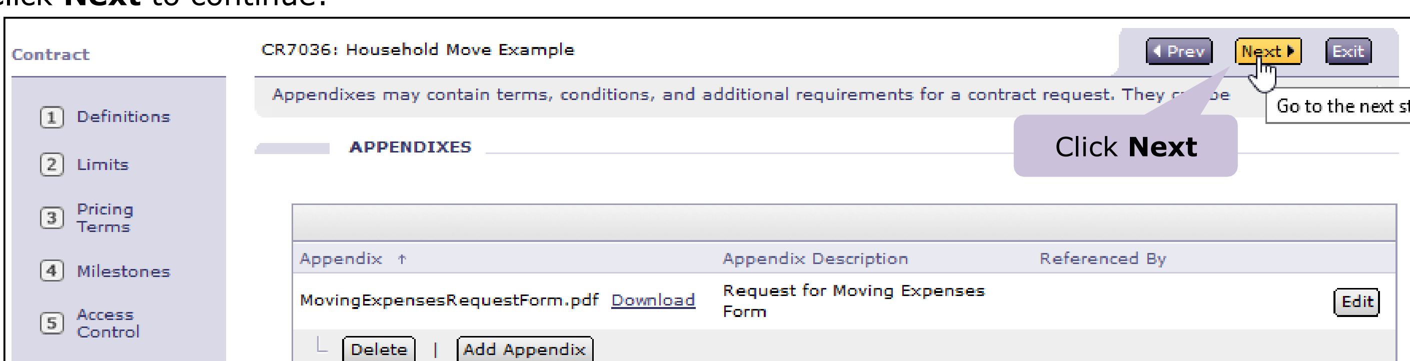
20. In the **Appendixes** step, attach the completed and signed **Request for Moving Expenses Form**. Click **Add Appendix:**



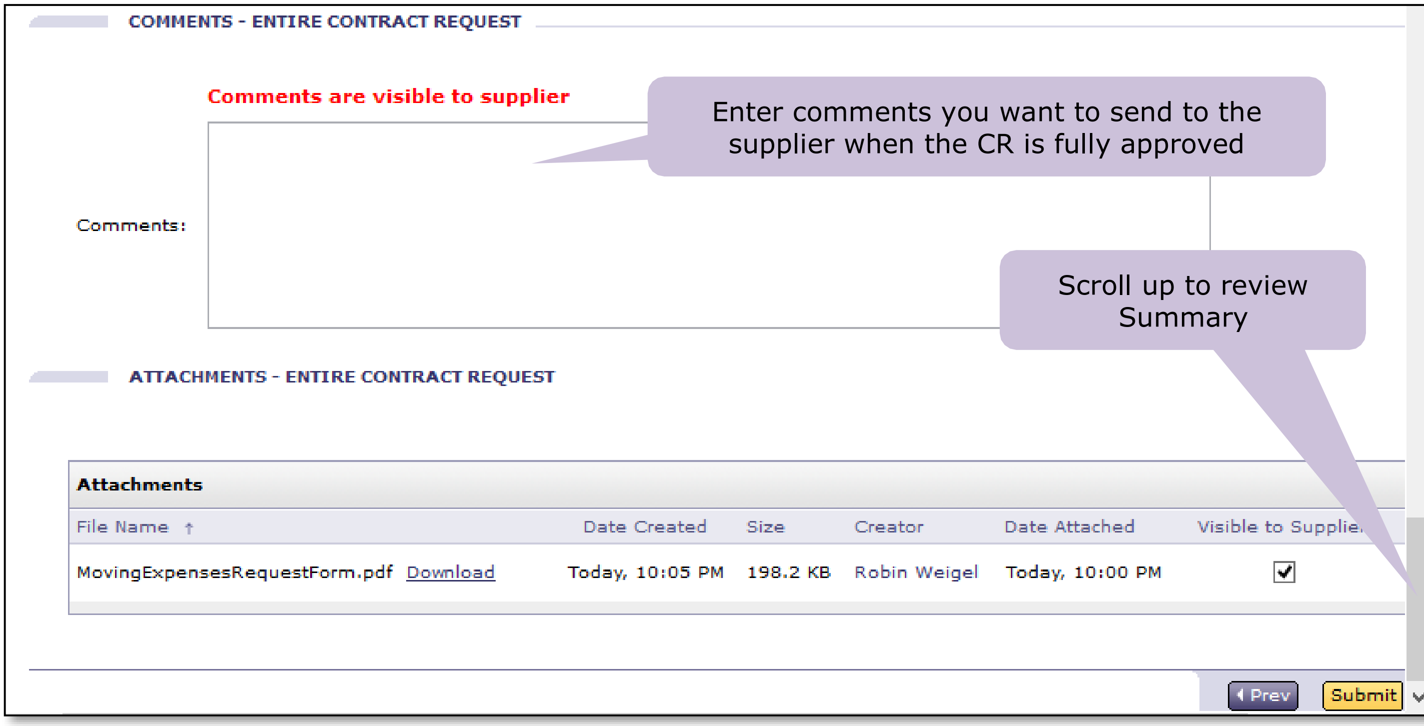
a. Click **Browse** to locate and select the attachment:

b. Enter a description of the attachment, click the **Visible to Supplier** checkbox, and click **OK.**

21. Click **Next** to continue:



22. You will be at the bottom of the **Summary Page** and you can scroll up to review all of the information you entered before you submit the request:



23. The top of the **Summary Page** contains tabs that you can click on to review the details you have entered for all of the steps. After careful review, click **Submit** to submit the CR for approval:

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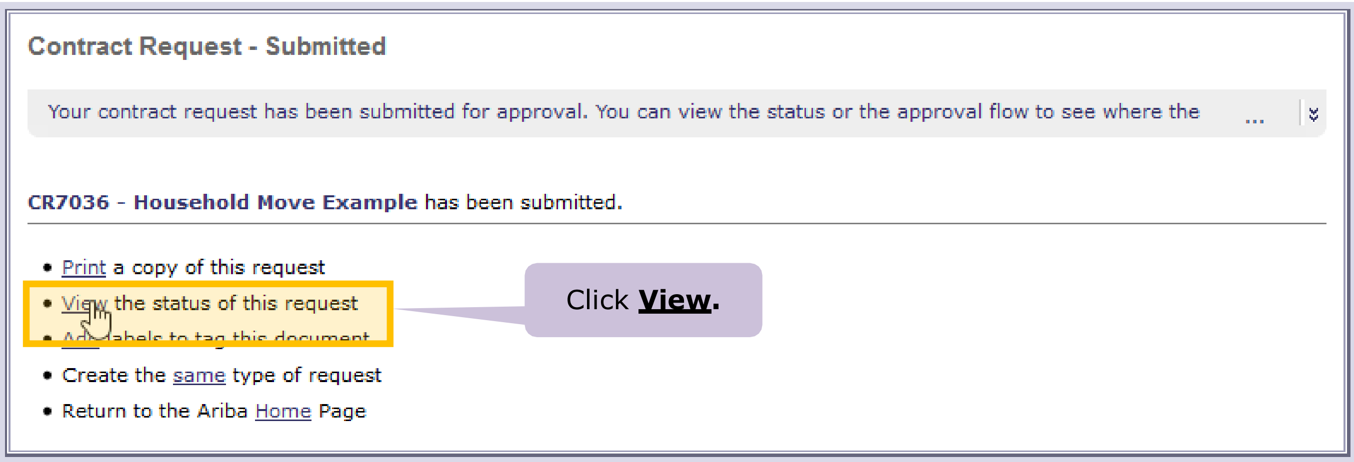
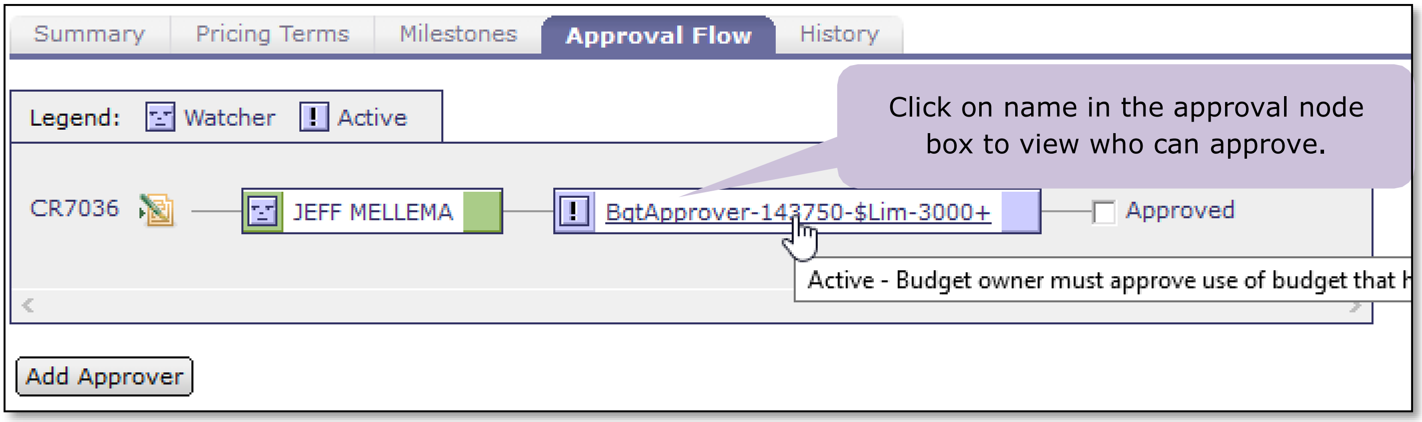
24. Click **<u>View</u>** to view the approval flow of the request:

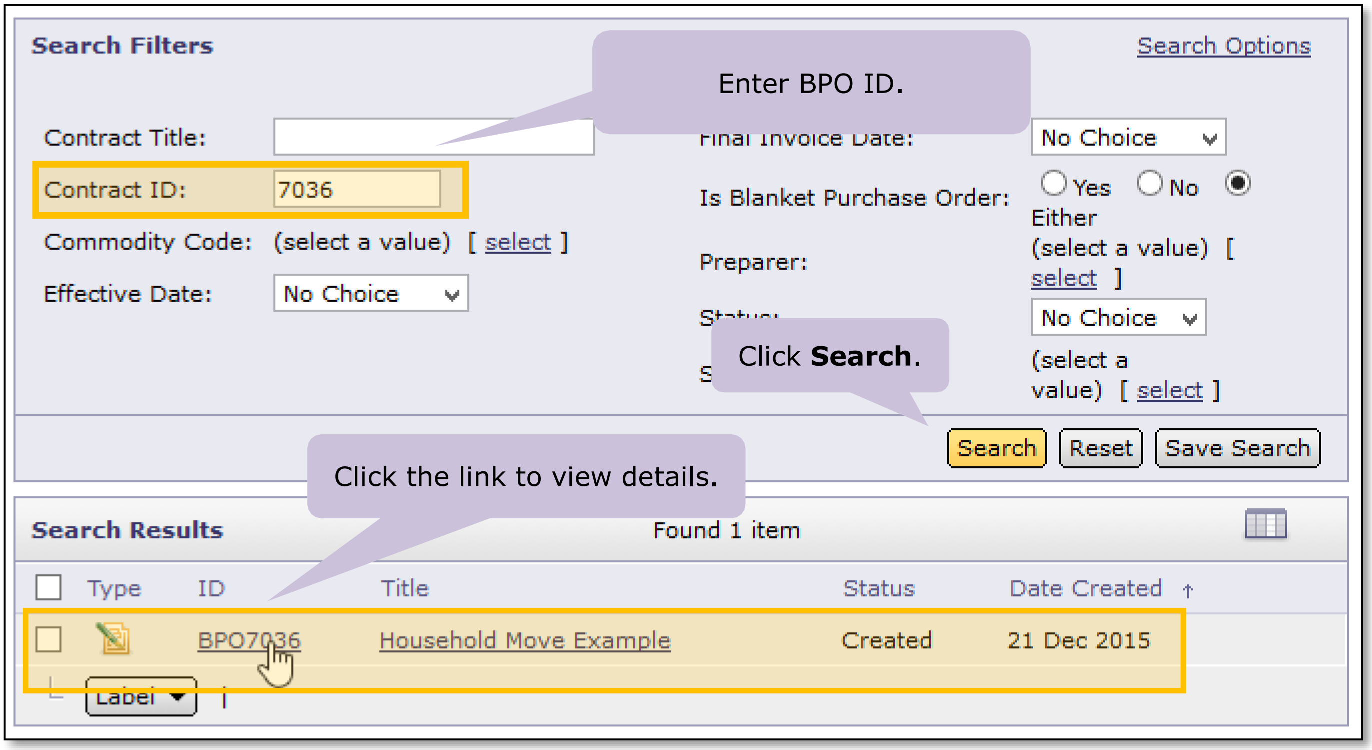


25. The **Approval Flow** screen shows the status and who needs to approve the request. You can click on the name in the approval node box for a list of individuals who can approve:



26. The Contract Request (CR) will be kept in the **My Documents** area of your **Contracts Dashboard**. You can check its status at any time. If the request is fully approved, then the BPO will be sent to the supplier. *<u>You (the Preparer) and the person specified as the Contact for the CR will receive email notifications for each approval and also when the CR is fully approved.</u>*

27. To view the BPO in eProcurement once it is approved:
    a. Click on **Search-> Contract**.
    b. Enter the BPO Number, in this example 7036, into the **Contract ID** field and click **Search**. (The numbers for the BPO will be the same as the numbers in the CR ID. The BPO will have a prefix of BPO.)
    c. To view BPO details, click on BPO ID link as pictured below:



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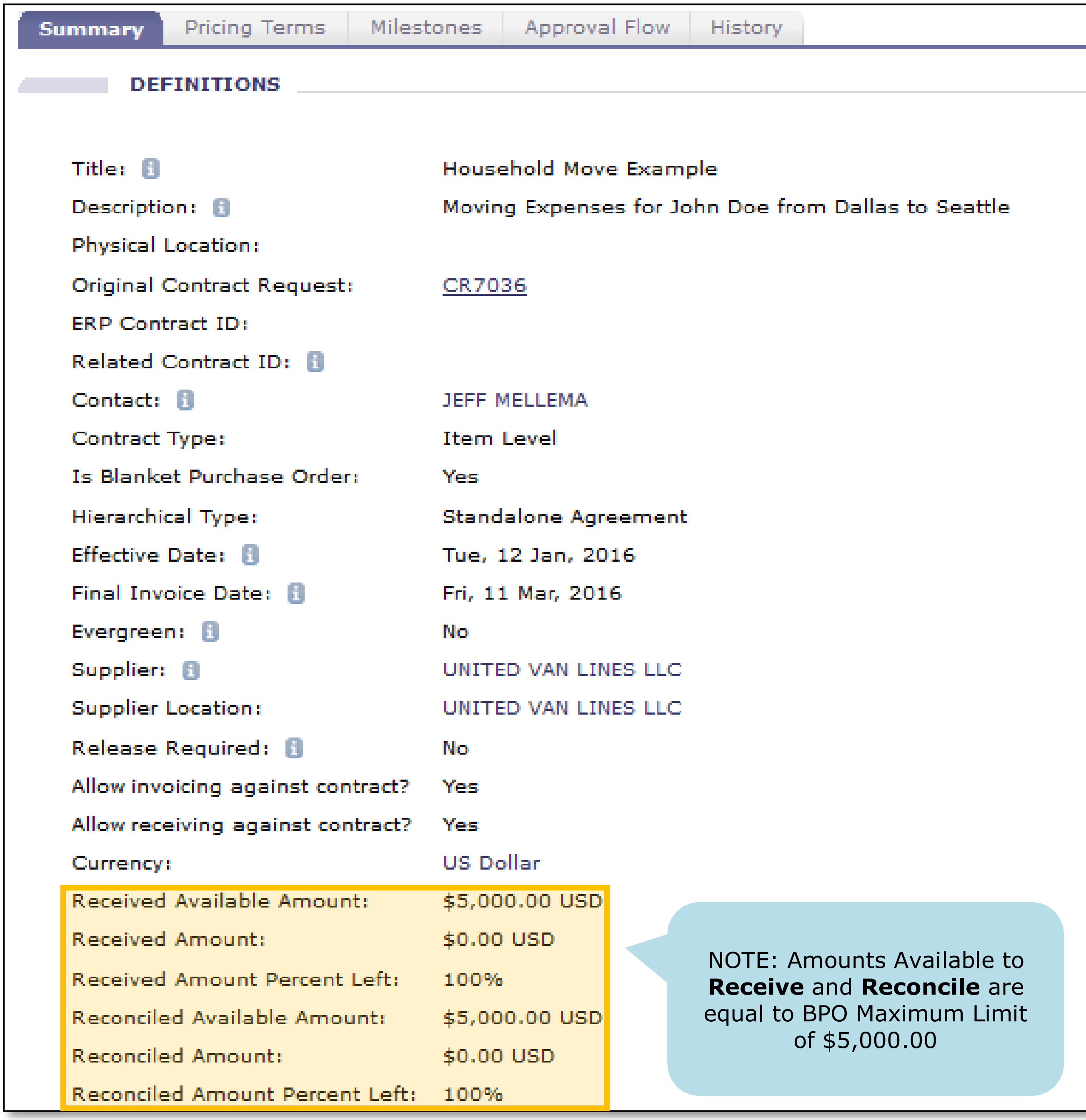
28. The BPO **Summary** page appears:



29. If you are finished, you can click on **Logout** in the upper right hand corner and close your browser window: