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](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?*

   - **Important**: Fields marked with an asterisk (*) are required.
   - Enter a descriptive title
   - Include name of individual, origin and destination.
   - Select Department Contact.
   - Specify dates.
   - Select **United Van Lines** as the supplier.
   - **IMPORTANT**: Click **YES**
4. The **Exception Item List** field appears. To select the **Household\Laboratory Moves** Exception type, follow the steps in the screen captures below:

The **Exception Item List** field appears. Click on the drop-down arrow.

Select **Search for more...**

If you don’t see the **Household\Laboratory Move Exception Item**, you can enter part of the name and click **Search**.

The list is in alphabetical order by **Name**.

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

Click **Select**.

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**Continued on the next page.**
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:

   - Enter the estimated amount of the move.
   - You can optionally specify notifications be sent when Amount Available reaches a threshold or before reaching the **Final Invoice Date**.
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:

Continued on the next page.
13. The next screen allows you to enter more information about the line item:

- **Full Description:** Moving expenses to move John Doe from Dallas, TX to Seattle, WA.
- **Commodity Code:** Transport services
- **Supplier:** UNITED VAN LINES LLC
- **Contact:** UNITED VAN LINES LLC
- **Supplier Part Number:** N/A
- **Supplier Auxiliary Part ID:**
- **Unit of Measure:** each
- **Negotiated Price:** $5,000.00
- **Is this M&E item?** (Click for Yes): No

**LIMITS**

The minimum and maximum amount that can be spent/quantity that can be ordered for this item. The tolerance % is the percent by which you can exceed the maximum amount value.

- **Select Amount from drop down:**
- **Enter estimated amount of the move and leave the Tolerance at 0%**

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

**SELECT ACCOUNTING**

The account and department to be charged for orders that contain this item, and split accounting across multiple accounts and departments. Accounting values may default from a sourcing event.

- **Account Code:** 044800 (MOVING EXPENSE) Blan2015
- **Object SubObjects:** 0448
  - **Sub SubObjects:** 00
- **Budget Number:** 145750 (EPROCUREMENT)
- **Organization Code:** 2080302026 (ECOMMERCE) Blan:2015
- **Task:**
- **Option:**
- **Project:**
  - **Split Accounting**

**The system sets 0448 Account Code. This cannot be changed.**

**Select UW Budget Number for payment.**

**Click Done to continue.**

**Use the Split Accounting button to specify multiple UW budgets.**
15. Review the line item to ensure accuracy. Click **Next** to continue:

![ARIBA SPM interface](image1)

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:

![Access Control interface](image2)

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

![Add Appendix](image)

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

![Browse](image)

Click **Browse** to locate and select the **Request for Moving Expenses Form**.

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

![Add/Edit Appendix](image)

Click **OK**

Enter a description of the attachment

Click the **Visible to Supplier** checkbox.

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:

![Comments - Entire Contract Request]

- Enter comments you want to send to the supplier when the CR is fully approved
- Scroll up to review Summary

![Attachments - Entire Contract 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:

![Contract]

- Click on tab to review details.
- Click **Submit** to route the request for approval.
- Scroll down to review.

**Continued on the next page.**
24. Click **View** to view the approval flow of the request:

![Approval Flow Screen](image)

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:

![Approval Flow Screen](image)

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. *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.*
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:

![BPO Search Diagram]

Continued on the next page.
28. The BPO **Summary** page appears:

![BPO Summary Page](image)

**DEFINITIONS**

- **Title:** Household Move Example
- **Description:** Moving Expenses for John Doe from Dallas to Seattle
- **Physical Location:**
- **Original Contract Request:** CR7036
- **ERP Contract ID:**
- **Related Contract ID:**
- **Contact:** JEFF MELLEMA
- **Contract Type:** Item Level
- **Is Blanket Purchase Order:** Yes
- **Hierarchical Type:** Standalone Agreement
- **Effective Date:** Tue, 12 Jan, 2016
- **Final Invoice Date:** Fri, 11 Mar, 2016
- **Evergreen:** No
- **Supplier:** UNITED VAN LINES LLC
- **Supplier Location:** UNITED VAN LINES LLC
- **Release Required:** No
- **Allow invoicing against contract?** Yes
- **Allow receiving against contract?** Yes
- **Currency:** US Dollar

<table>
<thead>
<tr>
<th>Received Available Amount</th>
<th>$5,000.00 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Received Amount</td>
<td>$0.00 USD</td>
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<tr>
<td>Received Amount Percent Left</td>
<td>100%</td>
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<tr>
<td>Reconciled Available Amount</td>
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<tr>
<td>Reconciled Amount</td>
<td>$0.00 USD</td>
</tr>
<tr>
<td>Reconciled Amount Percent Left</td>
<td>100%</td>
</tr>
</tbody>
</table>

**NOTE:** Amounts Available to **Receive** and **Reconcile** are equal to BPO Maximum Limit of $5,000.00

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

![Logout Button](image)

Click **Logout** and close the browser window.