

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**.

Click Create.

Select Contract Request.

ID	Title	Date ↓	Status
CR1740	July 8 - Ariba Network Test	7/8/2015	Processed
CR1713-V2	Research Subcontract-ReddyGo	7/1/2015	Processed
CR1728	Research Subaward for ReddyGo Inc	6/30/2015	Composing
CR1712-V4	Ad Hoc Test	6/29/2015	Composing

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?*

Contract CR7036: Household Move Example

DEFINITIONS ! **Important:** Fields marked with an asterisk (*) are required.

Title: Household Move Example
 Description: Moving Expenses for John Doe from Dallas to Seattle

Related Contract ID: []

Contact: **JEFF MELLEMA** (Select Department Contact.)

Effective Date: *Tue, 12 Jan, 2016 (Specify dates.)

Expiration Date: Mon, 11 Apr, 2016

Final Invoice Date: Fri, 11 Mar, 2016

Supplier: *UNITED VAN LINES LLC (Select **United Van Lines** as the supplier.)

Supplier Location: *UNITED VAN LINES LLC [select]

Ship To: ROOSEVELT COMMONS

Deliver To: 1 Mellema 3rd floor

Is this item listed on the exception item list? Yes No **IMPORTANT: Click YES**

Definition of Exceptions


Default to Contact. Can be changed.

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

Is this item listed on the exception item list? Yes No

Definition of Exceptions

Exception Item List: (none selected) 


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

Is this item listed on the exception item list? Yes No

Definition of Exceptions

Exception Item List: (none selected)

Blood, Blood Serum and Platelet

Search for more... 

Select **Search for more...**

Choose Value for Exception Item List

Field: Name

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

Name ↑
(no value)

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

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

Choose Value for Exception Item List

Field: Name

Name ↑	Description
Household\Laboratory Moves	Household\Laboratory Moves

Click **Select**.

Select the

Continued on the next page. 

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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?*

Exception Item List:

Household\Laboratory Moves

The Lump Sum moving allowance is the preferred method for household moves. For more information about the Lump Sum method, visit the [Lump Sum Moving Allowance](#) page.

Enter a justification of why you have not chosen the Lump Sum Moving Allowance here.

Why have you not chosen lump sum as your moving option?

Explain why you are not using the Lump Sum Moving Allowance.

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:

Are you including any non-allowable items in this move? Yes No

For a list of the non-allowable items for a Household/Laboratory move, please go to the non-allowable list provided in the Household/Laboratory move section of the [Exception Items](#) page. All non-allowable items must be on a discretionary budget.

Select **No** if all items are allowable. Click the link to the [Exception Items](#) page to review if necessary.

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:

Click **Next**.

Contract: CR7036: Household Move Example

Define the overall limits for this contract request, and specify how users should be notified when those limits are reached.

MINIMUM COMMITMENT

Minimum Commitment applies to the entire contract. Not applicable.

MAXIMUM LIMIT

Maximum Limit applies to the entire contract. Notifications are sent when 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: USD

Tolerance:

Send notification when Amount Available is at or below:

ADDITIONAL APPROVERS LIST

Add additional approvers to the approval flow if a release against the contract does not meet the criteria.

EXPIRATION DATE NOTIFICATION

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

Send notification: days before the contract expires

Re-notify every: days

You can optionally specify notifications be sent when Amount Available reaches a threshold or before reaching the **Final Invoice Date**.

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

Contract CR7036: Household Move Example

1 Definitions
2 Limits
3 Pricing Terms
4 Milestones
5 Access Control

Materials and Services

Id	Description	Discount	Contractible Factors
No items			

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:

ARIBA* SPEND MANAGEMENT

Home | Help | Logou

Home Contracts Procurement T & E Invoicing Reimbursement

Welcome ROBIN WEIGER

Create Search Manage Recent Preferences

Add Item Level Pricing Terms

Select items to add to your contract. You can add catalog and non-catalog items. Once you add an item, enter the associated limit and pricing discount

There are no catalog items available.
You can create a non-catalog item.

Click the non-catalog link

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

Add Item Level Pricing Terms

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

Click **OK** to continue.

Cancel

Add item to this

Enter description of the move.

Full Description: * Moving expenses to move John Doe from Dallas, TX to Seattle, WA.

Commodity Code: * Transport services

Select **Transport services** for the Commodity Code.

Supplier: UNITED VAN LINES LLC

Contact: UNITED VAN LINES LLC

Supplier Part Number: * N/A

Enter **N/A** for the Supplier Part Number.

Supplier Auxiliary Part ID:

Unit of Measure: each

Negotiated Price: * \$5,000.00 USD

Enter the estimated amount of the move.

Is this M&E item? (Click for Yes): Yes No

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

Add/Edit Item Level Pricing Terms

Enter the pricing terms for this item, including limits and discount. Some values may default if the contract is being created as a result of a ...

Supplier: UNITED VAN LINES LLC

DESCRIPTION

Full Description:

Commodity Code:

Supplier: UNITED VAN LINES LLC

Contact: UNITED VAN LINES LLC

Supplier Part Number:

Supplier Auxiliary Part ID:

Unit of Measure:

Negotiated Price: USD

Is this M&E item? (Click for Yes): 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.

Set Item Limits by:

Maximum Amount:

Tolerance:

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:

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) Bien:2015

Object SubObject: 0448

Sub SubObject:

Object SubObject: 0448

Sub SubObject: 00

Budget Number:

Organization Code: 2080302026 (ECOMMERCE) Bien:2015

Task:

Option:

Project:

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

Select UW Budget Number for payment.

Use the **Split Accounting** button to specify multiple UW budgets.

Click **Done** to continue.

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

The screenshot shows the ARIBA Spend Management interface. The top navigation bar includes 'Home', 'Contracts', and 'More ...'. The main content area displays the contract details for 'CR7036: Household Move Example'. A sidebar on the left lists steps: 1. Definitions, 2. Limits, 3. Pricing Terms (highlighted), 4. Milestones, and 5. Access Control. The main area shows a table of 'Materials and Services' with one item: '1 Moving expenses to move John Doe from Dallas, ...' with a discount of '\$5,000.00 USD Negotiated Price'. A callout bubble points to the 'Next' button in the top right corner, with the text 'Click Next'.

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:

The screenshot shows the 'Access Control' screen. The sidebar on the left lists steps: 1. Definitions, 2. Limits, 3. Pricing Terms, 4. Milestones, and 5. Access Control (highlighted). The main area has a heading 'EDIT ACCESS' and a sub-heading 'Users who are authorized to edit this contract. The requester automatically has edit access.' Below this, there is a field 'Editing Users: (select a value) [select]'. A callout bubble points to the 'select' link, with the text 'Click select'.

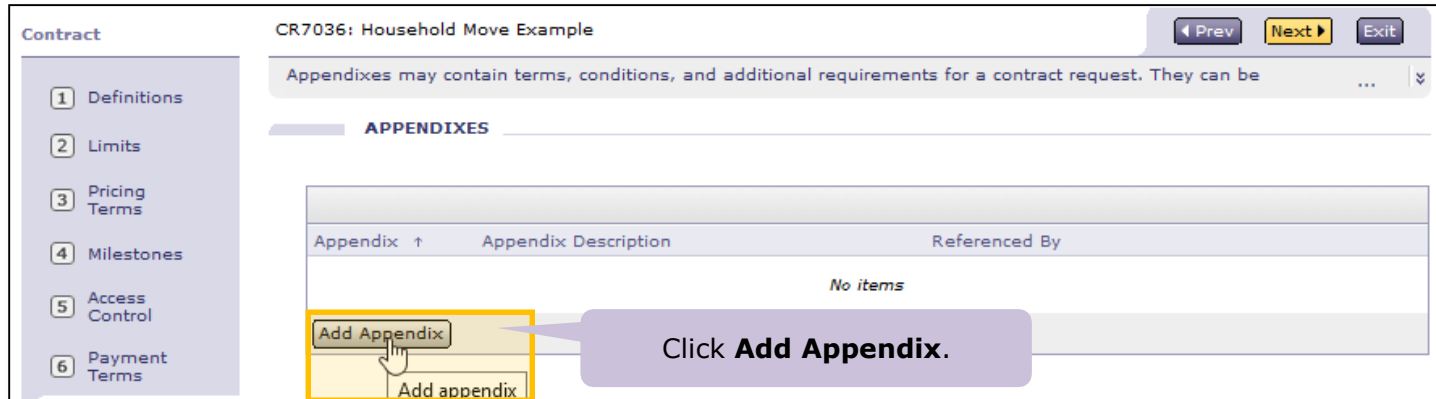
18. You can search by name or select email as the search field and search by UW Net ID. Click the checkboxes next to the names of those to whom you want to give Edit Access. Click **Done** and then click **Next** to continue.

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

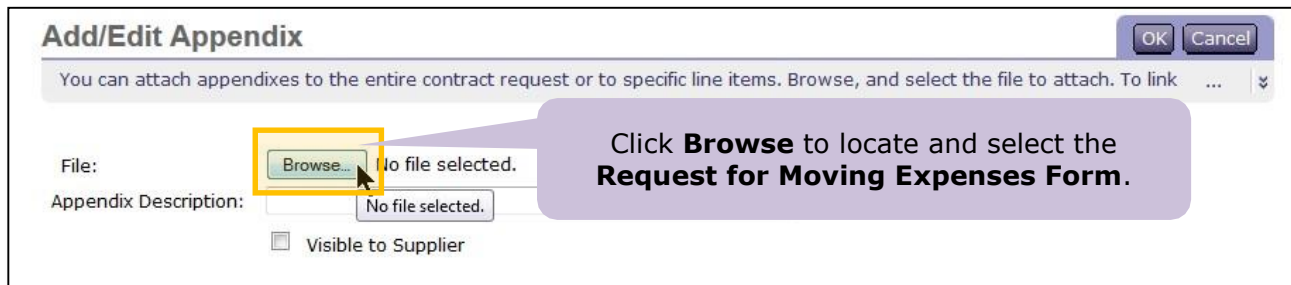
Continued on the next page. →

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



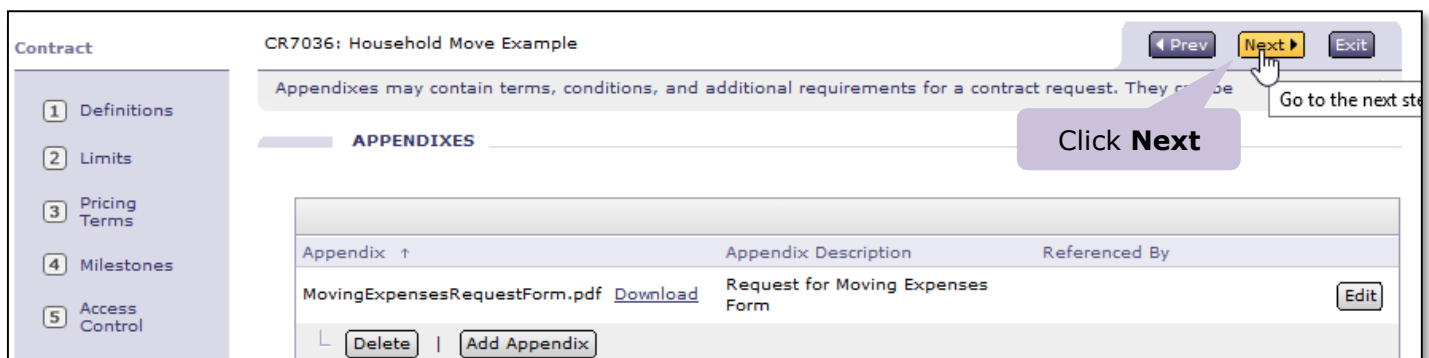
a. Click **Browse** to locate and select the attachment:



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



21. Click **Next** to continue:



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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

Comments are visible to supplier

Comments:

Enter comments you want to send to the supplier when the CR is fully approved

Scroll up to review Summary

ATTACHMENTS - ENTIRE CONTRACT REQUEST

File Name	Date Created	Size	Creator	Date Attached	Visible to Supplier
MovingExpensesRequestForm.pdf Download	Today, 10:05 PM	198.2 KB	Robin Weigel	Today, 10:00 PM	<input checked="" type="checkbox"/>

Prev Submit

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 CR7036: Household Move Example

Review and e... the request for approval, or exit and save the request in a comp... Submit this req

Prev Submit Exit

Click on tab to review details.

Scroll down to review.

Click **Submit** to route the request for approval.

DEFINITIONS

Title: [i]

Description: [i]

Related Contract ID: [i]

Contact: [i] JEFF MELLEMA

Continued on the next page. →

24. Click **View** to view the approval flow of the request:

Contract Request - Submitted

Your contract request has been submitted for approval. You can view the status or the approval flow to see where the ...

CR7036 - **Household Move Example** has been submitted.

- [Print](#) a copy of this request
- [View](#) the status of this request
- [Add](#) labels to tag this document
- Create the [same](#) type of request
- Return to the Ariba [Home](#) Page

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:

Summary Pricing Terms Milestones **Approval Flow** History

Legend: Watcher Active

CR7036 — JEFF MELLEMA — BgtApprover-143750-\$Lim-3000+ — Approved

Active - Budget owner must approve use of budget that h

Add Approver

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.

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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:

The screenshot displays the eProcurement search interface. The 'Search Filters' section includes fields for Contract Title, Contract ID (with '7036' entered), Commodity Code, Effective Date, Final Invoice Date, Is Blanket Purchase Order, Preparer, Status, and a 'Search Options' link. A 'Search' button is highlighted. Below the filters, the 'Search Results' section shows 'Found 1 item'. A table lists the results with columns for Type, ID, Title, Status, and Date Created. The first result is highlighted, and a callout points to the 'BPO7036' ID link.

Type	ID	Title	Status	Date Created
	BPO7036	Household Move Example	Created	21 Dec 2015

Continued on the next page. →

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

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
Received Available Amount:	\$5,000.00 USD
Received Amount:	\$0.00 USD
Received Amount Percent Left:	100%
Reconciled Available Amount:	\$5,000.00 USD
Reconciled Amount:	\$0.00 USD
Reconciled Amount Percent Left:	100%

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:

ARIBA® SPEND MANAGEMENT

Home | Help | **Logout**

Home Contracts Procurement T & C

Create Search Manage Recent Pref

Welcome ROBIN WEIGEL

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