

Create

Log into ARIBA

On the upper left-hand corner of your screen, click **Create** and choose **Contract Request** on the drop down menu:

Definitions

Enter general requirements for the BPO, such as: *Title, Description, Related Contract ID, Effective Date, Expiration Date, Final Invoice Date, Supplier Name, Supplier Location, Shipping and Delivery Information, if the BPO is for an exception item or if it is for a [Subaward](#).*

If the BPO supercedes a previous PO (such as an expired PAS PO), enter the old PO number in the **Related Contract ID** field of the Contract Request.

The individual who initiates a BPO is called the *Preparer*. The **Contact** specified on the BPO is the *Requester* ("On behalf of"). The **Contact** is able to:

- Make changes to the CR. Refer to the [Change/Close BPO Page](#) for more information.
- Receive for a BPO. Refer to the [Receiving Step-by-Step Guide](#) for more information.

Enter the following information for the **BPO Date Fields**:

Field Name and Description	Required?
Effective Date <ul style="list-style-type: none"> ○ The BPO Start Date. ○ Can be prior to the date the CR is being created. ○ Valid invoice dates must be on or after this date. 	Yes
Expiration Date <ul style="list-style-type: none"> ○ The date the terms of the BPO will expire. ○ For user information only to record when the BPO ends. 	No
Final Invoice Date <ul style="list-style-type: none"> ○ IMPORTANT: <i>If expiration email notifications are specified in the EXPIRATION NOTIFICATIONS section, this is the date that is used to trigger the notification.</i> ○ Used to communicate to the supplier the final date for sending invoices. 	Yes

- Some departments use a date that is 30 days from the **Expiration Date**, while others choose 60 or 90 days, depending on their department procedures and processes.
- The system will change the BPO status to **Inactive** after this date.
- The supplier *can* send invoices after this date if funds are still available for invoice reconciliation. However, a *Contract Item Date Variance* exception will be applied and will need to be resolved by extending the Final Invoice Date through a BPO change for the invoice to be reconciled and paid.

Indicate if the BPO is for an *Exception Item*. Visit the [Exception Items](#) webpage or more information.

Indicate whether the BPO is a *Subaward*. Visit the [Office of Sponsored Programs \(OSP\)](#) [Subaward](#) webpage for more information.

Indicate whether the usage of the contract will potentially expose any [patient health information \(HIPAA\)](#).

If the order is going to be under the direct buy limit, indicate if you need to have the contract reviewed by Purchasing.

Limits

In this step of creating the BPO, you define the overall limits for the BPO, as well as specify who should be notified when those limits are reached.

In the MAXIMUM LIMIT section:

- The **Maximum Limit** field is the total amount of money that can be spent.
 - **Note:** Ensure that the amount of a BPO's Maximum Limit equal the line items' overall amount. For example, if a BPO's Maximum Limit is 1000 dollars, the line items' overall amount must also equal 1000 dollars.
- **Tolerance** is the percentage by which the order can exceed the maximum amount. Use **Tolerance** to factor in sales tax and freight into the cost of the BPO.
- Use **Send notification when Amount Available is at or below** to indicate whether someone needs be notified when the *Amount Available* is at or below a percentage.

In the EXPIRATION DATE NOTIFICATION (i.e., actually the *FINAL INVOICE DATE NOTIFICATION*) section:

- Use **Send Notification** to specify the number of days before the FINAL INVOICE DATE when notification reminders should start. Notifications will be sent to the Preparer, Contact and anyone specified in the NOTIFICATIONS section.
- Use **Re-notify every** to specify how frequently the FINAL INVOICE DATE notifications should be re-sent.

In the NOTIFICATIONS section:

- Use the **Send Notifications to** drop-down to specify users (other than the BPO Preparer and Contact) to receive email notifications about the BPO.

Pricing Terms

Create the BPO's line items, and enter the line items' information, such as: commodity code, supplier part number, unit of measure, negotiated price.

- If there is more than one item on a BPO, each **Supplier Part Number** must be unique. If your item does not have a **Supplier Part Number**, enter a meaningful value.
- Ensure that the overall amount of a BPO's line items equal the contract's Maximum Limit. For example, if a BPO's Maximum Limit is 1000 dollars, the line items' overall amount must also equal 1000 dollars.

Specify whether M&E Exemption will be claimed for an item. See the Equipment Inventory Office website for the process.

Specify which budgets to charge, as well account and PCA codes to use. Split Accounting is available in this step.

Access Control

Specify another user authorized to edit the BPO.

If you want another user to be able to edit the BPO, give someone **Edit Access** via the **Access Control** section when creating the Contract Request.

The person specified as having **Edit Access** can edit only after the **Preparer** has submitted the CR for approval. The CR cannot be in **Composing** status.

The person specified under **Access Control** will have **Edit Access** to the BPO (but cannot receive).

Appendixes (Attachments)

Attach documents, such as quotes, to the Contract Request.

This section may also contain terms, conditions, and additional requirements for the BPO.

Choose whether an attachment needs to be visible to the supplier.

- **Note:** There is a 4 MB per document limitation and an overall 10MB per CR or BPO. You can have multiple attachments as long as you don't go over 10MB. Once you hit this limit the system will not send the attachment over the Ariba Network.

The **valid file types** are: *txt, csv, xls, xlsx, doc, docx, dotx, potx, ppt, pptx, ppsx, sldx, xltx, pdf, ps, rtf, htm, html, xml, jpeg, jpg, bmp, gif, png, zip*

Summary

Review and edit the CR. When finished, submit the request for approval, or exit and save the CR in a **Composing** status.

If the BPO will be over the Direct Buy Limit, select the basis for the supplier selection from a drop-down menu provided.

The options are: Complete Solicitation, Sole Source, Existing Contract, Supplier named in a Federal grant or contract, and Supplier named in a non-federal grant.

Answer questions specific to foreign suppliers, if the BPO will be sent to a foreign supplier.

View the CR's approval graph via the Approval Flow tab.

Enter comments, which can be flagged as visible to supplier or left internal.

Approve

1. Log into eProcurement.
2. Click on the **Contracts** tab.
3. In the "To Do" section, click on the Contract Request Title's link or "CR" number.
4. Review the Contract Request details and click **Approve** or **Deny**.
5. Optionally, provide a comment and click OK.

Note: After department approval, a Contract Request over the Direct Buy Limit will be routed to Purchasing, for a buyer's review and final approval, before the order is successfully placed with the supplier.

Reviewing a BPO's Status

Composing	Submitted	Processed	Open	Inactive	Closed
The BPO has not yet been submitted for approval	The BPO has been submitted but not yet fully approved	The BPO has been sent to the supplier	The BPO is within overall limits (funds and contract period)	The BPO is beyond its contract period	The BPO lacks funds

Has a CR ID number for internal purposes	Has a CR number for internal purposes	CR number is tied to a BPO number			
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