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.

**Definitions**

- **Title:** Untitled Contract Request
- **Description:**
- **Related Contract ID:**
- **Contact:**
- **Effective Date:**
- **Expiration Date:**
- **Final Invoice Date:**
- **Supplier:**
  - **Supplier Location:**
  - **Ship To:**
  - **Deliver To:**
- **Is this item listed on the exception item list?** Yes No

**Definition of Exceptions**

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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**
Select the Supplier

Select the Supplier Location
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.

The system requires that you answer the question: **Is this item listed on the exception item list?**

Since painting is a Construction Exception Item, click **Yes**.
The **Exception Item List** field appears.

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

**Definition of Exceptions**

Exception Item List: (none selected)

Funding Sources: 1

**No Items**

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

**Definition of Exceptions**

Exception Item List: (none selected)

Funding Sources: 1

Click **Search for more...**

Search for more...
Locate Construction and Building Alteration, Modification and Repairs, and click Select.

Is this item listed on the exception item list?

Exception Item List:

What is the name of the Exception Item?

Does the University own all space to be modified? [ ] Yes [ ] No

By checking this box, I certify that I have attached the authorization from facilities to contract out these services (NOTE: Attach documents in the Appendixes Section):

Request facilities authorization [ ]

Will this contract include the services of individuals providing building construction, maintenance, or repair work, or provide construction-related services, painting, or janitorial services? [ ] Yes [ ] No

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.

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

**Definition of Exceptions**

- Construction and Building Alteration, Modification, and R...

**Exception Item List:**

**Does the University own all space to be modified?**  
Yes  No

By checking this box, I certify that I have attached the authorization from facilities to contract out these services (NOTE: Attach documents in the Appendixes Section):

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

**Will this contract include the services of individuals providing building construction, maintenance, or repair work, or provide construction-related services, painting, or janitorial services?**  
Yes  No

**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.

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**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.

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

**Definition of Exceptions**

- Construction and Building Alteration, Modification, and R...

**Exception Item List:**

**Does the University own all space to be modified?**  
Yes  No

By checking this box, I certify that I have attached the authorization from facilities to contract out these services (NOTE: Attach documents in the Appendixes Section):

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

**Will this contract include the services of individuals providing building construction, maintenance, or repair work, or provide construction-related services, painting, or janitorial services?**  
Yes  No

**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.

**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

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**Step 3 Pricing Terms** is the section where you will add items to the order.

To start, click on **Add Items**.
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...

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

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Click on create non-catalog item.

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Add Item Level Pricing Terms

Describe the non-catalog item and add any available information below.

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Full Description: Exterior Painting Services for the UW Purchasing Building

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Commodity Code: Building and Facility Construction and Maintenance Services

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Choose the Commodity Code of Building and Facility Construction and Maintenance Services

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Enter the full description of the item.
Add Item Level Pricing Terms

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

Full Description: *Exterior Painting Services for the UW Purchasing Building

Commodity Code: *Building and Facility
Supplier: REDDYGOSOLUTIONS
Contact: REDDYGOSOLUTIONS
Supplier Part Number: *PaintingServices
Supplier Auxiliary Part ID:
Unit of Measure: lot
Negotiated Price: *$9,000.00 USD

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.

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

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**.

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

For this order, we will enter $9000.00 for the **Maximum 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.

Step 6 Payment Terms is not being utilized by campus at this time. To reach Step 7 Appendices 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.

Click Browse
Choose the file you would like to attach.

When you are finished, click OK.

Enter a brief description of the attachment.

Since the attachment is for UW internal purposes, do not mark the Visible to Supplier box.
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**. All comments entered here are visible to the supplier.
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 & Services Approval** 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.
For More Information...

- Visit the Blanket Purchase Ordering and Exception Item Ordering sections of the Procurement Customer Services Website
  http://f2.washington.edu/fm/ps/how-to-buy/AribaBlanketPurchaseOrders
  http://f2.washington.edu/fm/ps/how-to-buy/exception-items

- If you have questions or need assistance, contact Procurement Customer Services by
  - email: pcsHelp@uw.edu or
  - Phone: 206-543-4500