

Exception Item Ordering in eProcurement

Course Objectives

At the end of this presentation, users will:

- Understand what it means to order Exception Items through eProcurement
- Know how to create Non-Catalog Orders and Blanket Purchase Orders (BPOs) for Exception Items in eProcurement
- Know the activities they need to complete in advance, such as getting written approvals and/or gathering necessary attachments, for certain Exception Items
- Know where to go to get more information about ordering Exception Items in eProcurement

Topics

- What is Exception Item Ordering in eProcurement?
- What Does This Replace?
- What is the Impact to eProcurement and PAS?
- What Types of Items are on the Exception List?
- What to Know Before You Begin
- Demonstrations
- Resources

Exception Item Overview

What is Exception Item Ordering in eProcurement?

- Exception Item Ordering in eProcurement is the ability to order items and services that used to be available only through the legacy Purchasing Accounting System (PAS)
- Orders for these goods and services can be placed through the following eProcurement (Ariba) buying modules:
 - Catalog Ordering
 - Non-Catalog Ordering
 - Blanket Purchase Orders (BPOs)
- Payment for these goods and services **IS NOT** available through the following eProcurement payment modules:
 - Non-PO Invoice
 - Payments to Individuals (P2I)
 - eReimbursements

What Does This Replace?

- Purchasing of these Exception Items in PAS will be replaced by ordering through eProcurement

What is the Impact to eProcurement?

- Preparers are **required** to answer a new question in the Catalog Ordering, Non-Catalog Ordering and BPO buying modules that asks:
Is this item listed on the exception item list?
- If the answer is **Yes**:
 - Preparers are prompted to select the exception type from a pre-defined list

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What is the Impact to Campus Users?

- Preparers are now **required** to answer the Exception question for any order (Catalog, Non-Catalog, or BPO) *even if it is not an Exception Item purchase*
- If they answer "Yes", then based on the exception type, eProcurement might:
 - Ask certification questions and/or ask the preparer to attach documents before submitting the request for approval
 - Set specific account codes and/or add special approvers
 - Ask additional questions to:
 - Alert users to restrictions on which departments can place the order
 - Tell users to stop processing the order in eProcurement and seek assistance elsewhere

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What is the Impact to PAS?

- Orders that are placed in PAS for these Exception Items will be cancelled and users will be asked to place the orders through eProcurement instead

What Types of Items are on the Exception List?

- Automated External Defibrillators (AED)
- Biological Safety Cabinets
- Blood, Blood Serum and Platelets
- Cadavers, Organs, and Other Human Tissue
- Charters - Vessels (Boats), Aircraft and Bus
- Construction and Building Alteration, Modification, and Repairs
- Firearms, ammunition, explosives
- Fume Hoods
- Lab Refrigerators/Lab Freezers
- Live Animals, Custom Animal Antibodies, Non-Preserved Animal Organs and Tissue
- Radioactive Chemicals/Materials/Equipment
- Resale Items
- UW Logo and/or Trademark Usage
- XRay/Lasers

For more details and the current list, visit

<http://f2.washington.edu/fm/ps/how-to-buy/exception-items>

What to Know Before You Begin



We will discuss each item to the right to help you understand what you need to know before you begin



Order & Item Information

Exception Information

Exception Approvers

Auto-Selected Account Codes

Attaching Required Forms and Documents

Exception Certifications

Exception Restrictions

Supplier Requirements

Order & Item Information

Know what you want to buy

Have the item information ready before placing the order



- Item Description
- Commodity Code(s)
- Supplier Name
- Supplier Part Number
- Quantity
- Unit of Measure
- Price per unit
- Account Code(s)
- Budget Number(s)

Commodity Codes are universal, standard classification codes for products and services used to detail where money is spent within a company. Please visit the Commodity Codes web page to learn how to search for these codes:

<http://f2.washington.edu/fm/ps/how-to-buy/commodity-codes>

Account Codes are six digit numbers used by the UW to categorize expenses made on a budget. They can be researched on the Object codes web page:

<http://f2.washington.edu/fm/fa/references/object-codes>

Exception Information

- Carefully review the details for the Exception Item in the Exception List on the Procurement Services Website <http://f2.washington.edu/fm/ps/how-to-buy/exception-items>
- Visit and review links in the Exception Item description to ensure you understand the purchasing policies, procedures and requirements for that specific exception type
- Ensure you collect all of the necessary approvals and documentation before you initiate your request

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Exception Approvers

- Selection of some Exception Items will add an Exception Approver to the approval flow
- Exception Approvers are added after Compliance Approvers, Budget Approvers and Funding Approvers
- Below is an example approval flow for an Exception Item that has an Exception Approver



- Below is an example approval flow for Exception Items that DO NOT have an Exception Approver



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Which Exception Items Have Exception Approvers?

Exception Item	Exception Approver
Automated External Defibrillators (AED)	AEDApproval
Custom Animal Antibodies	CustomAnimalAntibodies
Biological Safety Cabinets	BSCCabinetApproval
Blood, Blood Serum and Platelets	Goods&ServicesApproval
Cadavers, Organs, and Other Human Tissue	Goods&ServicesApproval
Construction and Building Alteration, Modification, and Repairs	Goods&ServicesApproval
Firearms, ammunition, explosives	Goods&ServicesApproval
Fume Hoods	FumeHoodApproval
Radioactive Chemicals/Materials/Equipment	RSApproval
XRay/Lasers	RSApproval

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Auto-Selected Account Codes

- Selection of some Exception Items will automatically select an Account Code
- The Auto-Selected Account Code is required and cannot be changed for the Exception Type

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Which Exception Items Have Auto-Selected Account Codes?

Exception Item	Account Code
Charters	033700
Resale Items	059800
Radioactive Chemicals/Materials/Equipment	053200

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Attaching Required Forms and Documents

- Selection of some Exception Items will require the preparer to:
 - Attach supporting documents to the request
 - Answer a question to certify that the documents are attached
- The types of supporting documentation include:
 - Current versions of required forms with signatures
 - Documentation of pre-approval to purchase services

- *The following document types may be attached in eProcurement:*
txt, csv, xls,xlsx, doc, docx, dotx, potx, ppt, pptx, ppsx, sldx, xlsx, pdf, ps, rtf, htm, html, xml, jpeg, jpg, bmp, gif, png, zip

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File Size Limitations

- There is a 4 MB per document limitation.
- You can have multiple attachments as long as the aggregate file size does not go over 10MB per order.
- When scanning a document to attach to an order, be mindful of the image resolution and document size you use.
- You can also compress files before attaching them.

Which Exception Items Require Attachments?

Exception Item	Attachment(s)
Automated External Defibrillators (AED)	<ul style="list-style-type: none"> • Completed AED Purchase Form
Biological Safety Cabinets	<ul style="list-style-type: none"> • Biological Safety Cabinet Request to Purchase or Relocate Form
Blood, Blood Serum and Platelets	<ul style="list-style-type: none"> • Biological Use Authorization Application • Materials Transfer Agreement (MTA) if applicable
Cadavers, Organs, and Other Human Tissue	<ul style="list-style-type: none"> • Biological Use Authorization Application • Materials Transfer Agreement (MTA) if applicable
Construction and Building Alteration, Modification, and Repairs	<ul style="list-style-type: none"> • Authorization from facilities to contract out for the services
Firearms, ammunition, explosives	<ul style="list-style-type: none"> • Approval to purchase a firearm, ammunition, and/or explosives from UW Police Department
Resale Items	<ul style="list-style-type: none"> • Copy of UW Reseller Permit obtained from the Tax Office

Exception Certifications

- Each eProcurement Exception Item has at least one Exception Certification question that you must answer before the system allows you to submit the request.

IMPORTANT

By submitting a response to the exception question within eProcurement you are certifying that all information you have provided is true and correct to the best of your knowledge

What are Some Examples of Exception Certifications?

Exception Certification	Example
Certify that you have attached a specific document	For Resale Items – “By checking this box, I certify that I have attached my resale UW certificate to my order”
Certify that you have reviewed published information	For Lab Refrigerators – “By checking this box, I certify that I have I reviewed the safety information published by EH&S and agree to order required safety stickers and affix such stickers to the purchased refrigerators and freezers
Certify that you are purchasing from a supplier that meets certain criteria	For UW Logo – “By checking this box, I certify that the purchase of products with a UW logo or trademark is made with a supplier approved by UW Trademarks and Licensing”

Exception Restrictions

- Selection of some Exception Items will:
 - Alert preparers to restrictions which limit order placement to certain departments
 - Tell preparers to stop composing the requisition or contract request in eProcurement and seek assistance elsewhere

Which Exception Items Have Restrictions?

Exception Item	Restriction
Live Animals	The user preparing the request must be from the Department of Comparative Medicine or the Washington National Primate Research Center (WANPRC)
Construction and Building Alteration, Modification, and Repairs	The request cannot be processed in eProcurement if the University does not own all space to be modified

Supplier Requirements

- Suppliers must be registered with the University of Washington
- Suppliers must be available in eProcurement
- For BPOs, suppliers must also be on the Ariba Network

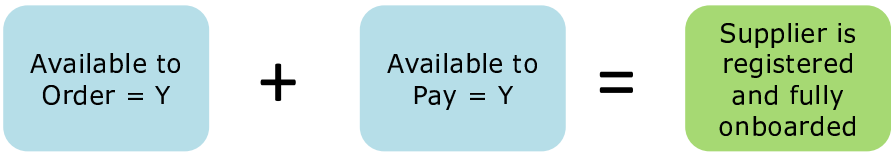
IMPORTANT

Use the **Supplier Search Procurement Desktop Report (PDR)** to determine the supplier status. To access the report, visit the Procurement Desktop Reports web page: <http://f2.washington.edu/fm/ps/tools-for-reconciling/pdr>

Supplier Search PDR – Supplier Registration

- Suppliers are registered and fully onboarded with the UW if they are Available to Order and Available to Pay

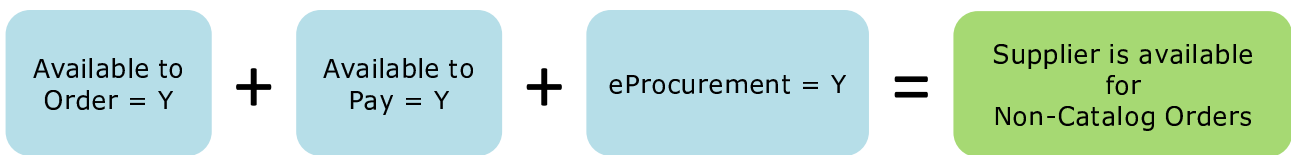
Supplier			Available to		Supplier Attributes				
Name	Number	Date Added	Order	Pay	eProcurement	Catalog	Contract	Ariba Network	Electronic Payment
<input type="checkbox"/> UNITED BICYCLE TOOL SUPPLY	115651	5/21/1985	Y	Y	N	N	N	N	N



Supplier Search PDR - Non-Catalog Orders

- Suppliers are available for Non-Catalog Orders if they are Available to Order, Available to Pay and in eProcurement

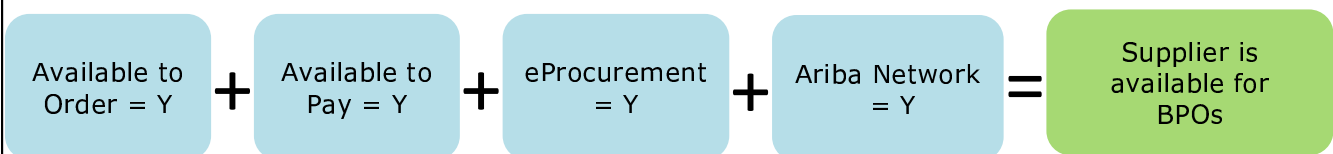
Supplier			Available to			Supplier Attributes			
Name	Number	Date Added	Order	Pay	eProcurement	Catalog	Contract	Ariba Network	Electronic Payment
WILCOX CONSTRUCTION INC	269339	7/10/2012	Y	Y	Y	N	N	N	Y



Supplier Search PDR - BPOs

- Suppliers are available for BPOs if they are Available to Order, Available to Pay, in eProcurement and on the Ariba Network

Supplier			Available to			Supplier Attributes			
Name	Number	Date Added	Order	Pay	eProcurement	Catalog	Contract	Ariba Network	Electronic Payment
KONE INC	180694	4/5/1995	Y	Y	Y	N	Y	Y	Y



Non-Catalog Order Exception Item Example

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For this demonstration we will place a Non-Catalog Order for a one-time purchase of bagels and bagel condiments (cream cheese, etc.) for resale at a campus coffee shop.

For this order, we will be using the following information:

- Commodity code: Food distribution services
- Quantity: 1
- Unit of Measure: Each
- Price: \$651.40

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Before You Begin

- Review the Resale Exception Item requirements on the Procurement Services Webpage
- Contact the Tax Office to obtain a copy of the **UW Reseller Permit**
- Be prepared to:
 - Check a box to certify that UW Reseller Permit is attached
 - Answer the question of whether or not tax is being collected
 - This information is for data analysis purposes only

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The process of creating a Non-Catalog Order is started by selecting **Requisition** from the **Create** drop-down menu. A **Requisition (S)** starts the process of creating a Non-Catalog Order.

The screenshot displays the ARIBA Spend Management dashboard. At the top, the ARIBA logo and 'SPEND MANAGEMENT' are visible. The user is logged in as MELANIE MC KAY FIELDS. The 'Create' menu is open, showing options like 'Contract Request' and 'Requisition'. A callout box points to 'Requisition' with the instruction '2. Select Requisition'. Another callout box points to the 'Create' button with the instruction '1. Click Create'. The main content area shows a 'Requisition' form with fields for 'Title' and 'ID', and a 'Search' button. Below the form, there are sections for 'My Labels' (Archive Items (53), CST (6)) and 'My Documents' (a table with columns ID, Title, Date, Status).

1. Click **Create**

2. Select **Requisition**

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Supplier

- Ariba Test Supplier ... (15)
- Bioline USA, Inc. - ... (285)
- COMMUNICATIONS ... (1)
- Fisher Scientific (21028)
- Intermountain ... (1)
- Show All ...

Favorites

- Recent Choices -

S538882:

Items: 0 Total: \$0.00 USD

Checkout Exit

Add items to your requisition. You can add items from the catalog, from vendor catalogs, from your favorites list, ...

Catalog Home

Catalog Search Options

Supplier Part #:

Manufacturer Part #:

CatalogId:

Create Non-Catalog Item

Click **Create Non-Catalog Item**

Office Depot Punchout (1)

See items ...

CDW Government Punchout (1)

See items ...

Praxair Punchout (3)

See items ...

Life Sciences Catalogs (20)

Fisher Punchout (1)

Anixter (2)

VWR Punchout (1)

More ...

Toys and Games (199)

Developmental and professional teaching aids (8874)

Classroom supplies (1007)

More ...

Non Contract Catalog

Shi Intl (1)

Uncategorized Items (91957)

See items ...

Containers and Storage (1661)

Containers (1661)



S538884:

Items: 0 Total: \$0.00 USD

OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Resale of Bagels and Associated Bagel Condiments

Enter an item description

Commodity Code: *(no value)

**For Commodity Code Help

Account Code: (none selected)

**For Account Codes Code Help

Supplier: (none selected)

Order Address: (no value)

Supplier Part Number: *

Manufacturer Part Number: *

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: *\$0.00 USD

Amount: \$0.00 USD

Update Total

OK Cancel



S538884:

Items: 0 Total: \$0.00 USD

OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Resale of Bagels and Associated Bagel Condiments

Commodity Code: * Food distribution services

**For Commodity Code Help

Account Code: 059900 (MISCELLANEOU)

**For Account Codes Code Help

Supplier: (none selected)

Order Address: (no value)

Supplier Part Number: *

Manufacturer Part Number: *

Select the **Commodity Code**

The **Account Code** will be set initially based on your choice of **Commodity Code**. Keep the default for now because the system will automatically change this to 05-9800 (RESALE PURCHASES) when you tell the system this is a Resale exception in a later step.

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: \$0.00 USD

Amount: \$0.00 USD

Update Total

OK Cancel



S538884:

Items: 0 Total: \$0.00 USD

OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Resale of Bagels and Associated Bagel Condiments

Commodity Code: * Food distribution services

**For Commodity Code Help

Account Code: 059900 (MISCELLANEOU)

**For Account Codes Code Help

Supplier: REDDYGOSOLUTIONS (REDDYGOS)

Order Address: REDDYGOSOLUTIONS [select]

Supplier Part Number: *

Manufacturer Part Number: *

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: \$0.00 USD

Amount: \$0.00 USD

Select the **Supplier**

Update Total

OK Cancel



S538884:

Items: 0 Total: \$0.00 USD

OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Resale of Bagels and Associated Bagel Condiments

Commodity Code: * Food distribution services

**For Commodity Code Help

Account Code: 059900 (MISCELLANEOU)

**For Account Codes Code Help

Supplier: REDDYGOSOLUTIONS (REDDYGOS)

Order Address: REDDYGOSOLUTIONS [select]

Supplier Part Number: * 12345

Manufacturer Part Number:

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: * \$0.00 USD

Amount: \$0.00 USD

Enter the **Supplier Part Number**

Update Total

OK Cancel



S538884:

Items: 0 Total: \$0.00 USD

OK Cancel

If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process ...

Full Description: * Resale of Bagels and Associated Bagel Condiments

Commodity Code: * Food distribution services

**For Commodity Code Help

Account Code: 059900 (MISCELLANEOU)

**For Account Codes Code Help

Supplier: REDDYGOSOLUTIONS (REDDYGOS)

Order Address: REDDYGOSOLUTIONS [select]

Supplier Part Number: * 12345

Manufacturer Part Number:

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: * 651.40 USD

Amount: \$0.00 USD

Enter the **Quantity**.
Select the **Unit of Measure**.
Enter the unit **Price**.

Update Total

OK Cancel



Click **OK** to continue

S538884:

Items: 0 Total: \$0.00 USD



If you cannot locate the item you want in the catalog, request a non-catalog item using the fields below. Non-catalog items may take longer to process.

Full Description: * Resale of Bagels and Associated Bagel Condiments

Commodity Code: * Food distribution services

**For Commodity Code Help

Supplier Auxiliary Part ID: []

Quantity: 1

Account Code: 059900 (MISCELLANEOU)

**For Account Codes Code Help

Unit of Measure: each

Price: *651.40 USD

Supplier: REDDYGOSOLUTIONS (REDDYGOS)

Amount: \$0.00 USD

Order Address: REDDYGOSOLUTIONS [select]

Supplier Part Number: * 12345

Manufacturer Part Number: []

Update Total



Enter a meaningful **Title** for the requisition

Title: *

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until: []

Telephone: 206-221-6014

Template: []

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

Definition of Exceptions

Funding Sources:

Description	Funding Source Percentage	Funding Source Amount
Other	100	\$651.40 USD

Enter a meaningful **Title** for the requisition

Title: * Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until: [calendar icon]

Telephone: 206-221-6014

Template: [checkbox]

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

[Definition of Exceptions](#)

Funding Sources:

Description ↑	Funding Source Percentage	Funding Source Amount
Other	100	\$651.40 USD

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

Since Resale Items are on the Exception Items list, click **Yes**.

Delay Purchase Until: [calendar icon]

Telephone: 206-221-6014

Template: [checkbox]

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

[Definition of Exceptions](#)

Exception Item List: (none selected)

Funding Sources:

Description ↑	Funding Source Percentage	Funding Source Amount
Other	100	\$651.40 USD

Summary Approval Flow

Title: * Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

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

Definition of Exceptions

Exception Item List: (none selected)

Funding Sources:

Description ↑	Funding Source Percentage	Funding Source Amount
Other	100	\$651.40 USD

The Exception Item List field appears.

Click the drop-down arrow.

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Summary Approval Flow

Title: * Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until:

Telephone: 206-221-6014

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

Definition of Exceptions

Exception Item List: (none selected)

Funding Sources:

Description ↑	Funding Source Percentage	Funding Source Amount
Other	100	\$651.40 USD

Click the drop-down arrow.

- XRay/Lasers
- Biological Safety Cabinets
- Cadavers, Organs, and Other Human Tissue
- Automated External Defibrillators (AED)
- Fume Hoods
- Resale Items
- Search for more...

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Title: * Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until:

Telephone: 206-221-6014

Template:

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

Exception Item List: (none selected)

Definition of Exceptions

- XRay/Lasers
- Biological Safety Cabinets
- Cadavers, Organs, and Other Human Tissue
- Automated External Defibrillators (AED)
- Fume Hoods
- Resale Items

Funding Sources:

Percentage	Funding Source Amount
	\$651.40 USD

Search for more...

Select **Search for more...**

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

Choose Value for Exception Item List

Field: Name Resale Search

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

Name		Select
(no value)		Select
Automated External Defibrillators (AED)	Automated External Defibrillators (AED)	Select
Biological Safety Cabinets	Biological Safety Cabinets	Select
Blood, Blood Serum and Platelets	Blood, Blood Serum and Platelets	Select
Cadavers, Organs, and Other Human Tissue	Cadavers, Organs, and Other Human Tissue	Select
Charters	Charters	Select
Construction and Building Alteration, Modification, and Repairs	Includes construction and installation, asbestos abatement, flooring, electrical, painting, janitorial, and other services provided by laborers.	Select
Firearms, ammunition, explosives	Firearms, ammunition, explosives	Select
Fume Hoods	Fume Hoods	Select
Lab Refrigerators/Lab Freezers	Lab Refrigerators/Lab Freezers	Select
Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue	Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue	Select
Radioactive Chemicals/Materials/Equipment	Radioactive Chemicals/Materials/Equipment	Select

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Done

Choose Value for Exception Item List

Field:

Name ↑	Description	
Resale Items	Resale Items	<input type="button" value="Select"/>

Click **Select**

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Summary Approval Flow

Title:

On Behalf Of:

Delay Purchase Until:

Telephone:

Template:

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

Definition of Exceptions

Exception Item List:

Resale items require a resale certificate that can be obtained from the **tax office**.

By checking this box, I certify that I have attached my resale UW certificate to my order (NOTE: Attach documents in the Attachments Section):

Is your department collecting sales tax? Yes No

You are required to check this box to submit the request.

IMPORTANT: The State of Washington REQUIRES that you attach a copy of the UW Reseller Permit to the request. *By checking the box, you are certifying that the Reseller Permit is attached.* You can do this in the **Attachments** section below.

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Summary Approval Flow

Title: * Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until: []

Telephone: 206-221-6014

Template: []

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

Definition of Exceptions

Exception Item List: Resale Items

Resale items require a resale certificate that can be obtained from the **tax office**.

By checking this box, I certify that I have attached my resale UW certificate to my order (NOTE: Attach documents in the Attachments Section):

Is your department collecting sales tax? Yes No

The system requires that you select either **Yes** or **No** before you can submit your request. The information of whether or not your department is collecting sales tax is for data analysis purposes only.

Scroll down to view line items, shipping information, comments and attachments areas.

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The eProcurement system assigned the Resale **Account Code** of 05-9800 when you set the Exception Item to **Resale**.

No.	Type	Description	Add. Info	Account	Budget:Task:Option:Project	Qty	Unit	Price	Amount
1	[]	Resale of Bagels and Associated Bagel Condiments		059800	143750:::	1	each	\$651.40 USD	\$651.40 USD

Supplier: REDDYGOSOLUTIONS
 Contact: REDDYGOSOLUTIONS
 Commodity Code: Food distribution services
 Supplier Part Number: 12345
 Supplier Auxiliary Part ID:
 Manufacturer Part Number:
 Is this M&E item? (Click for Yes): No
 M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

[Edit] [Copy] [Delete] | [Add from Catalog...] [Add Non-Catalog Item...]

Total Cost: \$651.40 USD

Scroll down to add the **UW Reseller Permit** attachment.

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SHIPPING - ENTIRE REQUISITION

Ship To: * PURCHASING & ACCOUNTING
Deliver To(Room/Name): * Rm216/mfields

COMMENTS - ENTIRE REQUISITION

Comments:

Visible to Supplier

ATTACHMENTS - ENTIRE REQUISITION

Add Attachment

Click **Add Attachment**



ARIBA®

SPEND MANAGEMENT

Home

Contracts

Procurement

T & E

Invoicing

Create

Search

Manage

Recent

Add Attachment

Click **Browse**

File:

Browse

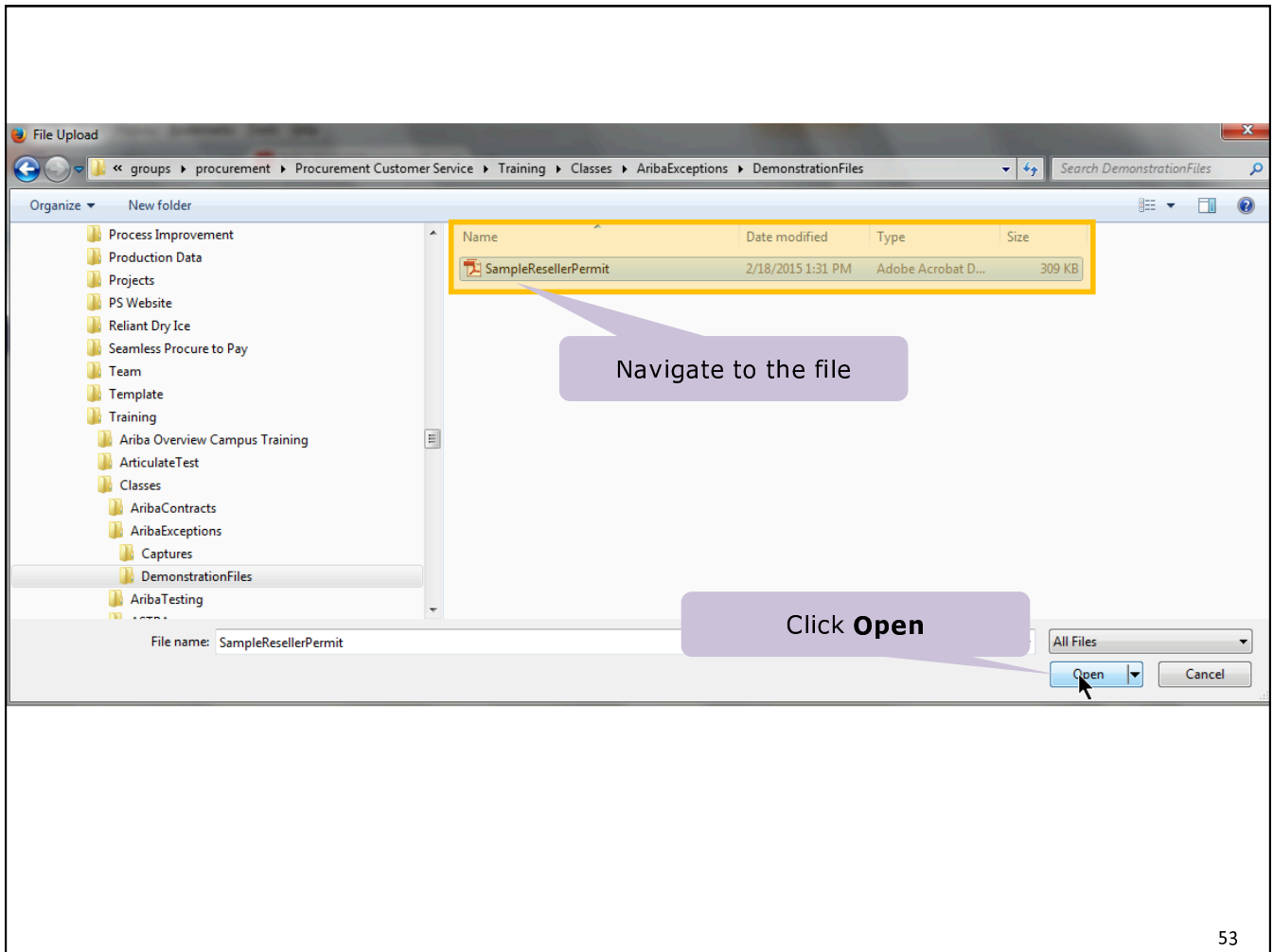
No file selected.



Visible to Supplier

OK

Cancel



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Add Attachment

File:

Browse...

SampleResellerPermit.pdf



Visible to Supplier

Click **OK**



Cancel

ATTACHMENTS - ENTIRE REQUISITION

Attachments					
File Name ↑		Size	Creator	Date Attached	Visible to Supplier
SampleResellerPermit.pdf	Download	308.8 KB	MELANIE MC KAY FIELDS	Today, 2:34 PM	<input checked="" type="checkbox"/>

[Add Attachment](#)

Verify the Attachment was added

Scroll up to review line item information

Supplier: REDDYGOSOLUTIONS
Contact: REDDYGOSOLUTIONS
Commodity Code: Food distribution services
Supplier Part Number: 12345
Supplier Auxiliary Part ID:
Manufacturer Part Number:
Is this M&E item? (Click for Yes): No
M and E TAX EXEMPT ITEM - 50% OR MORE QUALIFYING RESEARCH

Resale of Bagels and Associated Bagel Condiments

[Edit](#) [Copy](#) [Delete](#) | [Add from Catalog...](#) [Add Non-Catalog Item...](#)

Total Cost: \$651.40 USD

[Update Total](#)

SHIPPING - ENTIRE REQUISITION

Ship To: *PURCHASING & ACCOUNT

Deliver To(Room/Name): *Rm216/mfields

COMMENTS - ENTIRE REQUISITION

Comments:

Visible to Supplier

Scroll up to review header information

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[Home](#) [Contracts](#) [Procurement](#) [T & E](#) [Invoicing](#)

[Create](#) [Search](#) [Manage](#) [Recent](#) [Preferences](#)

If everything looks correct, click **Submit**.

S53882: Resale of Bagels and Associated Bagel Condiments

[Back to Catalog](#) [Submit](#) [Exit](#)

This is a summary of your current requisition. Review the information to be sure it is correct. You can go back to any previous step to change the

Summary [Approval Flow](#)

Title: *Resale of Bagels and Associated Bagel Condiments

On Behalf Of: MELANIE MC KAY FIELDS

Delay Purchase Until:

Telephone: 206-221-6014

Template:

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

Definition of Exceptions

Exception Item List: Resale Items

Resale items require a resale certificate that can be obtained from the **tax office**.

By checking this box, I certify that I have attached my resale UW certificate to my order (NOTE: Attach documents in the Attachments Section):

Is your department collecting sales tax? Yes No

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ARIBA® SPEND MANAGEMENT Home | Help | Logout

Home Contracts **Procurement** T & E Invoicing

Welcome MELANIE MC KAY FIELDS

Create Search Manage Recent Preferences

New Requisition - Submitted

Your request has been submitted for approval. Use the Status section of the Navigation Panel to monitor the request's progress through the approval ...

Click [View](#) to see the **Approval Flow** of this request.

S538882 - Resale of B... Budget Condiments 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

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Home Contracts **Procurement** T & E Invoicing

Welcome MELANIE MC KAY FIELDS

Create Search Manage Recent Preferences

S538882 - Resale of Bagels and Associated Bagel Condiments

Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You ...

Back

Summary **Approval Flow** Orders Receipts

Legend: Active

S538882 BgtApprover-143750-\$Lim-1000 Approved

Add Approver

Resale items do not require any special approvals. In this example, the only approver is the budget approver. You can click on the box to see who is assigned to this role.



S538882 - Resale of Bagels and Associated Bagel Condiments

Status: Submitted

These are the details of the request you selected. Depending on its status, you can edit, change, copy, cancel, or submit the request for approval. You ...

Back

You will receive an email notification when the requisition is approved. The approval node will turn green and display the name of the approver.

Summary Approval Flow Orders Receipts

Legend: Approved

S538882 KEVIN J CAMPBELL (BgtApprover-143750-\$Lim-1000) Approved

Add Approver



Blanket Purchase Order Exception Item Example

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**

The screenshot shows the ARIBA Spend Management interface. The top navigation bar includes 'Home', 'Contracts', 'Procurement', 'T & E', 'Invoicing', and 'Reimbursement'. Below this is a secondary bar with 'Create', 'Search', 'Manage', 'Recent', and 'Preferences'. The 'Create' button is highlighted with a yellow box. A dropdown menu is open under 'Create', showing 'Contract' and 'Contract Request', with 'Contract Request' also highlighted in yellow. A callout box points to 'Contract Request' with the text '2. Select **Contract Request**'. Below the menu, a 'Common Actions' panel shows 'Create', 'Contract Request', and 'Card Application'. To the right, there are input fields for 'Title:' and 'ID:'.

You will be brought to Step 1 **Definitions** of creating the Contract Request. You will need to enter information into multiple fields.

The screenshot shows the ARIBA Spend Management interface at the 'Definitions' step for creating a Contract Request. The top navigation bar includes 'Home', 'Contracts', 'Procurement', 'T & E', and 'Invoicing'. The user is logged in as 'MELANIE MC KAY FIELDS'. The left sidebar shows a list of steps: 1. Definitions (highlighted), 2. Limits, 3. Pricing Terms, 4. Milestones, 5. Access Control, 6. Payment Terms, 7. Appendixes, and 8. Summary. The main content area is titled 'DEFINITIONS' and contains various input fields: 'Title:' (with value 'Untitled Contract Request'), 'Description:', 'Related Contract ID:', 'Contact:' (with value 'MELANIE MC KAY FIELDS'), 'Effective Date:', 'Expiration Date:', 'Final Invoice Date:', 'Supplier:', 'Supplier Location:', 'Ship To:', 'Deliver To:', and 'Is this item listed on the exception item list?' (with radio buttons for 'Yes' and 'No'). There are also several dropdown menus and date pickers. A 'Next' button is visible at the top right of the form area.

Contract CR1388: Painting for UW Purchasing Building

Enter general requirements or definitions for the contract request, and specify whether the contract type is ...

DEFINITIONS

1 Definitions

2 Limits

3 Pricing Terms

4 Milestones

5 Access Control

6 Payment Terms

7 Appendixes

8 Summary

Enter the title of the CR.

Painting for UW Purchasing Building

Enter a brief description of the order.

Exterior painting for the UW Purchasing Building to be completed during the summer of 2015

The Contact defaults to the preparer. Use the drop-down to change this if you are preparing this request for someone else.

Related Contract ID:

Contact: MELANIE MC KAY FIELDS

Effective Date: * Wed, 1 Jul, 2015

Expiration Date: Mon, 31 Aug, 2015

Final Invoice Date: Fri, 30 Oct, 2015

Supplier: *(none selected)

Supplier Location: *(no value) [select]

Ship To: PURCHASING & ACCOUN

Deliver To: Rm216/mfields

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

Select Dates:
Effective (Start)
Expiration (End)
Final Invoice

Definition of Exceptions

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Contract CR1388: Painting for UW Purchasing Building

Enter general requirements or definitions for the contract request, and specify whether the contract type is ...

DEFINITIONS

1 Definitions

2 Limits

3 Pricing Terms

4 Milestones

5 Access Control

6 Payment Terms

7 Appendixes

8 Summary

Title: Painting for UW Purchasing Building

Description: Exterior painting for the UW Purchasing Building to be completed during the summer of 2015

Related Contract ID:

Contact: MELANIE MC KAY FIELDS

Effective Date: * Wed, 1 Jul, 2015

Expiration Date: Mon, 31 Aug, 2015

Final Invoice Date: Fri, 30 Oct, 2015

Supplier: * REDDYGOSOLUTIONS

Supplier Location: *(no value) [select]

Ship To: PURCHASING & ACCOUN

Deliver To: Rm216/mfields

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

Select the Supplier

Definition of Exceptions

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Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building Next ▶ Exit

Enter general requirements or definitions for the contract request, and specify whether the contract type is ...

DEFINITIONS

Title:

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

1 Definitions
2 Limits
3 Pricing Terms
4 Milestones
5 Access Control
6 Payment Terms
7 Appendixes
8 Summary

Select the Supplier Location

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Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building Next ▶ Exit

Enter general requirements or definitions for the contract request, and specify whether the contract type is ...

DEFINITIONS

Title:

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

1 Definitions
2 Limits
3 Pricing Terms
4 Milestones
5 Access Control
6 Payment Terms
7 Appendixes
8 Summary

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

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Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building Next Exit

Enter general requirements or definitions for the contract request, and specify whether the contract type is ...

DEFINITIONS

Title:

Description:

Related Contract ID:

Contact:

Supplier:

Supplier Location:

Ship To:

Deliver To:

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

Definition of Exceptions

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:

Click the drop-down arrow.

Funding Sources:

Description	Funding Source Percentage	Funding Source Amount
No items		


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


Definition of Exceptions

Exception Item List:

(none selected)

- Resale Items
- XRay/Lasers
- Charters
- Construction and Building Alteration, Modification, and R...
- Lab Refrigerators/Lab Freezers
- Live Animals, Custom Animal Antibodies, Non-Persevered An...
- Blood, Blood Serum and Platelets
- Radioactive Chemicals/Materials/Equipment
- Firearms, ammunition, explosives
- Cadavers, Organs, and Other Human Tissue

Search for more... 

Funding Sources: 

Click **Search for more...**

Choose Value for Exception Item List

Field: Name

Name ↑	Description	
(no value)		<input type="button" value="Select"/>
Automated External Defibrillators (AED)	Automated External Defibrillators (AED)	<input type="button" value="Select"/>
Biological Safety Cabinets	Biological Safety Cabinets	<input type="button" value="Select"/>
Blood, Blood Serum and Platelets		<input type="button" value="Select"/>
Charters	Charters	<input type="button" value="Select"/>
Construction and Building Alteration, Modification, and Repairs	Includes construction and installation, asbestos abatement, flooring, electrical, painting, janitorial, and other services provided by laborers.	<input type="button" value="Select"/>
Firearms, ammunition, explosives	Firearms, ammunition, explosives	<input type="button" value="Select"/>
Fume Hoods	Fume Hoods	<input type="button" value="Select"/>
Lab Refrigerators/Lab Freezers	Lab Refrigerators/Lab Freezers	<input type="button" value="Select"/>
Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue	Live Animals, Custom Animal Antibodies, Non-Persevered Animal Organs and Tissue	<input type="button" value="Select"/>

Locate Construction and Building Alteration, Modification and Repairs, and click **Select**.

Done

Is this item listed on the exception item list?

Click **Yes** to certify that to the best of your knowledge, the University owns all of the space to be modified.

Exception Item List:

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

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 [here](#).

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

Exception Item List:

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

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

Request facilities authorization [here](#).

Will this contract include the services of individuals providing building construction, maintenance, or repair work, or provide

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.

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

Exception Item List:

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

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

By checking this box, I certify that I have attached the authorization contract out these service documents in the Appendix

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

[Facilities authorization here.](#)

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.

Next 

Exit

Contract:

CR1388: Painting for UW Purchasing

Enter general requirements or definitions for the contract request, and specify whether the contract type is supplier level, ...

1 Definitions

2 Limits

3 Pricing Terms

4 Milestones

5 Access Control

6 Payment Terms


7 Appendixes

8 Summary

DEFINITIONS


Title: 

Painting for UW Purchasing Building

Description: 

Exterior painting for the UW Purchasing Building to be completed during the summer of 2015


Related Contract ID: 


Contact: 


MELANIE MC KAY FIELDS 


Effective Date: 

*Wed, 1 Jul, 2015 


Expiration Date: 

Mon, 31 Aug, 2015 

Final Invoice Date: 

Fri, 30 Oct, 2015 

Supplier: 

*REDDYGOSOLUTIONS 

Supplier Location: 

*REDDYGOSOLUTIONS [select]

Ship To: 

PURCHASING & ACCOUNT 

Deliver To: 

Rm216/mfields

Is this item listed on the exception item list?

Yes No

Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building

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

1 Definitions
2 Limits
 3 Pricing Terms
 4 Milestones
 5 Access Control
 6 Payment Terms
 7 Appendixes
 8 Summary

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.

Minimum Commitment applies to the entire contract. Notifications are sent when the Amount Spent does not meet the specified percentage of the Minimum Commitment.

Maximum Limit applies to the entire contract. Notifications are sent when the 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: 9000 USD
 Tolerance: 0%
 Send notification when Amount Available is at or below: 0%

Send notification: 0 days before the contract expires
 Re-notify every: 0 days

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)

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Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building

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

1 Definitions
2 Limits
 3 Pricing Terms
 4 Milestones
 5 Access Control
 6 Payment Terms
 7 Appendixes
 8 Summary

Click **Next** to continue to add items to the BPO

MINIMUM COMMITMENT

Minimum Commitment applies to the entire contract. Notifications are sent when the Amount Spent does not meet the specified percentage of the Minimum Commitment.

MAXIMUM LIMIT

Maximum Limit applies to the entire contract. Notifications are sent when the 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: 9000 USD
 Tolerance: 0%
 Send notification when Amount Available is at or below: 0%

ADDITIONAL APPROVERS LIST

Add additional approvers to the approval flow if a release against the contract does not meet the overall (maximum) or release (minimum or maximum) limits.

EXPIRATION DATE NOTIFICATION

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

Send notification: 0 days before the contract expires
 Re-notify every: 0 days

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Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building

1 Definitions
2 Limits
3 Pricing Terms
4 Milestones
5 Access Control
6 Payment Terms
7 Appendixes
8 Summary

Add and modify the pricing terms for the contract. The term category displayed is based on the contract type specified on ...

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

<input type="checkbox"/>	Id ↑	Description	Discount	Contractible Factors
--------------------------	------	-------------	----------	----------------------

Add items

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

Prev Next Exit

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Add Item Level Pricing Terms

Done

Select items to add to your contract. You can add catalog and non-catalog items. Once you add an item, enter ...

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

Click on create non-catalog item.

Done

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Add Item Level Pricing Terms

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

Enter the full description of the item.

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

Commodity Code: * Building and Facility Const...

Supplier: REDDYGOSOLUTIONS

Contact: REDDYGOSOLUTIONS

Supplier Part Number: *

Supplier Auxiliary Part ID:

Unit of Measure: each

Negotiated Price: * USD

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

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

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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

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

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.

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Click **OK**.

Add Item Level Pricing Terms

OK Cancel

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

Full Description:

Commodity Code:

Supplier: REDDYGOSOLUTIONS

Contact: REDDYGOSOLUTIONS

Supplier Part Number:

Supplier Auxiliary Part ID:

Unit of Measure:

Negotiated Price:

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

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DESCRIPTION

Full Description:

Commodity Code:

Supplier: REDDYGOSOLUTIONS

Contact: REDDYGOSOLUTIONS

Supplier Part Number:

Supplier Auxiliary Part ID:

Unit of Measure:

Negotiated Price:

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

In this screen, you will review and provide additional line item details.

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 Quantity:

Tolerance:

Use the drop-down arrow to change the value of **Set Item limits** from Quantity to **Amount**.

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:

Object SubObject:

Sub SubObject:

Object SubObject:

Sub SubObject:

Budget Number:

Organization Code:

Task:

Option:

Project:

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LIMITS

The minimum and maximum amount 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: Amount

Maximum Amount: 9000.00 USD

Tolerance: 0%

ACCOUNTING

The account and department to be charged for orders that values may default from a sourcing event.

Account Code: 036000 (OUT/SV.REPAR)

Object SubObject: 0360

Sub SubObject: 00

Object SubObject: 0360

Sub SubObject: 00

Budget Number: 143750 (EPROCUREMENT)

Organization Code: 2080302026 (ECOMMERCE) Bie

Task:

Option:

Project:

Split Accounting

Add Additional Items Done Cancel

Click **Done**

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.

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Welcome MELANIE MC KAY FIELDS

Contract

1 Definitions

2 Limits

3 Pricing Terms

4 Milestones

5 Access Control

6 Payment Terms

7 Appendixes

8 Summary

Modify the pricing terms for the contract. The term category displayed is based on the contract type specified on ...

Materials

Id	Description	Price	Contractible Factors
1	Exterior Painting Services for the UW ...	\$9,000.00	Contracted

Copy Delete Add items

Prev Next Exit

Click **Next twice** to move to Step 5 **Access Control**.

This completes Step 3 **Pricing Terms**. The next step, Milestones, is not utilized by campus at this time.

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.

Contract CR1388: Painting for UW Purchasing Building

Specify which users are authorized to edit this contract request and create releases against the contract. You can grant ...

EDIT ACCESS

Users who are authorized to edit this contract. The requester automatically has edit access.

Editing Users: (select a value) [select]

Prev Next Exit

Prev Next Exit

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

ARIBA® SPEND MANAGEMENT Home | Help | Logout

Home Contracts Procurement T & E Invoicing Welcome MELANIE MC KAY FIELD

Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building

Appendixes may contain terms, conditions, and additional requirements for a contract request. They can be transmitted to ...

APPENDIXES

Appendix ↑	Appendix Description	Referenced By
Add Appendix		

Prev Next Exit

Prev Next Exit

To add the authorization from facilities, click **Add Appendix**.

Add/Edit Appendix

OK Cancel

You can attach appendixes to the entire **Item** or **Item** items. Browse, and select the file to attach. To link the appendix to one or more items, click **Append**.

File: No file selected.

Appendix Description:

Visible to Supplier

Referenced By:

Exterior Painting

Services for the UW
Purchasing Building

OK Cancel

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Choose the file you would like to attach.

Organize ▾ New folder

- Process Improvement
- Production Data
- Projects
- PS Website
- Reliant Dry Ice
- Seamless Procure to Pay
- Team
- Template
- Training
- Ariba Overview Campus Training

Name	Date modified	Type	Size
FireArmsApproval	2/18/2015 4:26 PM	Adobe Acrobat D...	64 KB
PaintingApproval	2/18/2015 4:23 PM	Outlook Item	110 KB
PaintingApproval	2/18/2015 4:26 PM	Adobe Acrobat D...	64 KB
SampleResellerPermi...	2/18/2015 1:31 PM	Adobe Acrobat D...	309 KB

Type: Adobe Acrobat Document
Size: 63.8 KB
Date modified: 2/18/2015 4:26 PM

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When you are finished, click **OK**.

Enter a brief description of the attachment.

Add/Edit Appendix

You can attach appendixes to the entire contract request or to individual line items. Browse, and select the file to attach. To link the appendix to a line item, click the line item's name.

File: PaintingApproval.pdf

Appendix Description:

Visible to Supplier

Referenced By:

Exterior Painting Services for the UW Purchasing Building

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Click **Next** to continue to the Summary page.

ARIBA® SPEND MANAGEMENT

Home **Contracts** Procurement T & E Invoicing

Create Search Manage Recent Preferences

Contract CR1388: Painting for UW Purchasing Building

Appendixes may contain terms, conditions, and additional requirements for a contract request. They can be transmitted to the supplier.

APPENDIXES

Appendix ↑	Appendix Description	Referenced By
PaintingApproval.pdf <input type="button" value="Download"/>	Facilities Authorization	<input type="button" value="Edit"/>

|

1 Definitions
2 Limits
3 Pricing Terms
4 Milestones
5 Access Control
6 Payment Terms
7 Appendixes
8 Summary

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This will bring you to Step 8 **Summary**. You will be at the bottom of the page of.

Scroll up to perform a final review of the contract information you have entered.

COMMENTS - ENTIRE CONTRACT REQUEST

Comments are visible to supplier

Comments:

There is a box here to add **Comments**. All comments entered here are visible to the supplier.

ATTACHMENTS - ENTIRE CONTRACT REQUEST

Attachments					
File Name	Size	Creator	Date Attached	Visible to Supplier	
PaintingApproval.pdf Download	63.8 KB	MELANIE MC KAY FIELDS	Today, 4:09 PM	<input type="checkbox"/>	Delete

◀ Prev Submit Exit

Contract

CR1388: Painting for UW Purchasing Building

◀ Prev Submit Exit

Review and edit the contract request. When you are finished, submit the request for approval, or exit and save the request in a composing...

Summary Pricing Terms Milestones Approval Flow

DEFINITIONS

Title:

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

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):

Request facilities authorization [here](#).

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

If everything looks correct, click **Submit**.

Contract Request - Submitted

Your contract request is in the process. Click [View](#) to see the **Approval Flow** of this request.

CR1388 - Painting for UW Purchasing Building 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

CR1388 - Painting for UW Purchasing Building

Status: Submitted

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&ServicesApproval** buyer. You can click on the box to see who the approvers are.

Summary Pricing Terms **Approval Flow** History

Legend: Active Pending



Add Approver

CR1388 - Painting for UW Purchasing Building

Status: Submitted

These are the details of the

You will receive an email notification for each approval. The approval node will turn green and display the name of the approver.

for approval. You ...

Back

Summary Pricing Terms Milestones Approval Flow History

Legend: Approved

CR1388 MELANIE MC KAY FIELDS (BgtApprover-143750-\$Lim-3000+) KASSANDRA L. ELLEFSON

Add Approver

Summary Pricing Terms Milestones Ap

If you do not attach the required documentation, the **Goods&ServicesApproval** buyer will deny the CR. You will receive an email notification telling you that the request has been denied.

Legend: Approved Denied

MELANIE MC KAY FIELDS (BgtApprover-143750-\$Lim-3000+) KASSANDRA L. ELLEFSON (Goods&Service

Add Approver

***Internal comments only: ⓘ

Enter internal comment:

Add Comment

If your CR is denied, check the **Internal comments only** section on the **Summary** tab of the CR to determine why. The Internal comment should include any actions you must take before you resubmit the request.

User ↑	Date	Comment
KASSANDRA L. ELLEFSON	Today, 12:23 PM	Requests to contract out these services require authorization from facilities. There is no authorization attached this request so it is being denied. Please obtain authorization, attach it to this request and resubmit.

Conclusion

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For More Information...

- Visit the Procurement Customer Services Exception Item Ordering Web Page
<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

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In This Presentation We...

- Explained Exception Item Ordering in eProcurement
- Described what Exception Item Ordering replaces
- Described the impact of Exception Item Ordering to eProcurement and PAS
- Described the items that are on the Exception Item list
- Provided guidelines on what you need to know before you begin placing Exception Item Orders
- Provided Demonstrations
- Provided guidance on where to go for information and additional resources

Thank you!

- You will receive a post-course survey from the Procurement Customer Services team
- We ask kindly for your feedback to help enhance future trainings