MATERIAL REQUEST GLOSSARY OF FIELD NAME DEFINITIONS AND GENERALLY USED TERMS

MATERIAL REQUEST DESCRIPTION: The Description field at the Material Request screen is used to include important information for the ENTIRE order. The first line is standardized to include the shopcode, the requester’s name and the vendor’s name. A stock order can be limited to just the shopcode and the requester’s name since the vendor will always be FS Stores. Subsequent lines should be limited to standardized phrases indicating special delivery instructions, new vendor contact information, orders that do not require the handling fee, or references to related information such as email/related documents. When a vendor unfamiliar to Stores is being used, available contact information should be provided including a contact name, phone/fax number, or URL (limited to the home page of the vendor).

SHOPCODE: This is an established 6-character indicator of the shop and crew. It is used both as information to be communicated to FS Stores and as a searchable phrase (generally used with the “starts with” operator in the MR Description field). Examples are: 14ELEC, 15CARP, 16PLUM, 17SMTL, 18MASN, 53PAINT.

WILL CALL: A will call order should have the term “WILL CALL” at the end of the first line of the MR Description field. This will show on the Stores Program Coordinator’s queue and receive priority treatment. It is the responsibility of Stores to make arrangements with the Expeditor crew to pick up the needed material unless the shop person is making the pickup from the vendor. EXCEPTION: Construction shops MUST use expeditors for all will call requests, not a shop person.

SERVICE CONTRACT: This term is used in the MR Description field to indicate to the FS Stores Program Coordinator that the upcharge fee should not be applied. The current percentage handling fee is charged for Construction materials, but not on items such as permits or contracts.

ON CAMPUS LABOR SERVICE: This term is included in the MR Description field and indicates to FS Stores Program Coordinator that it is necessary to add the documentation for Terms & Conditions, Proof of Insurance, and Prevailing Wage. In the past this was generally indicated as a “Provide and Install” request where the vendor would provide the part(s) and come onto campus to do the actual installation work.

SEE EMAIL or SEE RELATED DOCS: When documents (bids, quotes, technical specs) are provided by the shop a note should be made in the MR Description to indicate that such documentation exists and the Stores Program Coordinator should look for it. If documents are sent by email (fsstores@uw.edu) the subject line must include the Material Request transaction number and the vendor name.

NOT TO EXCEED: Service Contracts with no set price can be submitted as NTE (not to exceed) and a request can be made for the Stores Coordinator to notify the requester of the final $ amount – this should be done on the MR Line Item. EX: A contractor is on campus doing an install, but the total hours are not known until the end of the job.
**SIGNATURE AUTHORITY:** When determining your Authority for Purchase dollar limit, the total dollar amount of the materials does NOT include freight, taxes or any additional fees – MATERIAL COST ONLY.

**VENDOR RENTALS:** Vendor Rentals should include a time frame (3 weeks, 3 months, etc.) to help identify whether the current vendor invoice is partial or complete payment.

**PURCHASING TOOLS ON A JOB:**

- If you need to purchase a tool specific to a job and the tool is billed to the client’s budget, then you must leave the tool with the client at the end of the job.
- If you need to purchase a tool specific to a job, buy it on the M&A overhead for shop/office supplies and keep it for future use in your shop at the end of the job.
  - First check with the tool room to see if they have the tool available.
  - Second see if the tool can be rented from an outside vendor.
  - Third buy it on the shop overhead number.

**REQUESTED BY:** This field is the Employee ID Number of the shop person. Since the work order and phase have been provided, the Zoom button on the Requested By field will provide a quick list of employees to choose from or the EID can be typed into the field.

**DELIVER TO:** The standard delivery is Stores to the requesting Shop. If any other delivery is required, the Deliver To field should be left blank and specific delivery instructions and location should be typed into the MR Description field. Standard delivery of stock parts is within 12-24 hours to the shop.

**DATE NEEDED:** This is intended to be a realistic need by date taking into consideration the scheduled start of the job and the manufacturer lead time necessary to provide and ship the part(s).

**STOCK:** Parts which are located within a Stores warehouse including Plant Services, Health Sciences, and Southwest Zone.

**NONSTOCK:** Any part(s) ordered that need to be provided by an off campus vendor.

**LINE ITEM DESCRIPTION:** This description field should be contrasted with the Material Request Description field definition. The Line Item Description applies to the part only. A full and complete description, sufficient that the correct part can be provided, must be entered. A description can be copied and pasted from another screen (ex: vendor catalog). A Stores stock part will auto fill the description when the part number is entered and the zoom button clicked.

**CONTRACTOR:** This field is being utilized as a method of distributing the MRs to various FS Stores Program Coordinators for processing. Only the FS Stores location should be entered here, not actual vendor names. Type FS in the field and click on the Zoom button, choose the FS Stores location nearest to the requesting shop.