

iBuy

Instructor-led Training

TRAINING GUIDE



iBuy: Instructor-led Training

Training Guide

APPROPRIATE USE AND SECURITY OF CONFIDENTIAL AND SENSITIVE INFORMATION

Due to the integrated nature of the various Human Resources, Finance and Student modules in **Banner** and the reporting information in the Enterprise Data Warehouse (EDW), you may have access to information beyond what you need to perform your assigned duties. Your access to **Banner** and the EDW has been granted based on business need, and it is your responsibility to ensure the information you access is used appropriately.

Here are some reminders of good data stewardship to help you carry out your responsibility:

- Do not share your passwords or store them in an unsecured manner. Do not leave your workstation unattended while logged on to administrative information systems. You are responsible for any activity that occurs using your logon ID.
- Do not share confidential and sensitive information with anyone, including colleagues, unless there is a business reason.
- Retrieve printed reports quickly, and do not leave the reports lying around in plain view.
- Secure reports containing confidential and sensitive information (e.g., FERPA, EEO, or HIPAA protected data).
- When disposing of reports containing confidential or sensitive information, shred the documents in a timely manner.

Your responsibilities regarding the protection and security of administrative information are outlined in the University of Illinois System Information Security Policy for Administrative Information and Guidelines posted at https://www.aits.uillinois.edu/reference_library/i_t_policies. Any violation could subject you to disciplinary action, which could include dismissal or, in those cases where laws have been broken, legal action. You should have signed a compliance form that indicates you have read, understand and agree to comply with the University System's Information Security Policy for Administrative Information. If you have not already signed the compliance form, please see your Unit Security Contact who is responsible for maintaining these forms.

Acknowledgements

Portions of this manual are based on Ellucian **Banner** System, Release 8.2.

Copyright

Copyright © 2016 University of Illinois – Office of Business and Financial Services. All rights reserved. No part of this publication may be reproduced or used in any form or by any means—graphic, electronic or mechanical, including photocopying, recording, taping or in information storage and retrieval systems—without written permission of University of Illinois – OBFS.

Sections of this documentation have been created specifically for the use of the Ellucian **Banner** System as it has been implemented at the University of Illinois and for no other purpose.

Trademarks

Banner® is a trademark of Ellucian Company L.P. or its affiliates and is registered in the U.S. and other countries.

Course Information

Course ID: iBuy: Instructor-led Training
Revision Date: September 7, 2017
Version: R1, V1.0

TABLE OF CONTENTS

Course Overview	1
Course Objectives	1
Lesson 1: Introduction to iBuy	2
1.1: Purchasing Methods	2
1.2: Description of iBuy	2
1.3: Advantages of iBuy	2
1.4: iBuy Roles	3
Lesson 2: Navigating iBuy	5
Lesson 3: Setting Up Your iBuy Profile	7
3.1: iBuy Profile Benefits	7
3.2: Steps to Setting Up Your Profile	7
Lesson Review	10
Lesson 4: Creating iBuy Orders	11
4.1: Types of Orders	11
4.2: Creating a Punchout Catalog Order	12
Lesson Review	14
4.3: Creating a Hosted Catalog Order	14
4.4: Creating Non-Catalog Orders	14
Lesson Review	15
Lesson 5: Approving iBuy Requisitions	17
5.1: Approver Roles	17
5.2: Approver Options	17
Lesson Review	18
5.3: Executive Approver Options	18
5.4: Overview of Approval Process	18
Course Summary	20
Course Objectives	20
Appendix A: OBFS Resources	21
OBFS Training Center	21
OBFS News Center	21
Appendix B: Support and Resources Summary	22

Course Overview

This course provides a hands-on approach to learning the iBuy application. This course is perfect for employees new to using **iBuy**.

iBuy combines the use of Internet technology with procurement best practices to streamline the purchasing process.

You will learn how to navigate the site, manage shopping carts, and utilize search methods. You will be taken through the shopping experience, the requisition procedure, the approval process; and you will learn how to recognize preferred suppliers, enter FOAPAL codes, and review requisitions before they are submitted for approval.

Course Objectives

At the end of this session, you will be able to:

- **Navigate *iBuy***
- **Modify an *iBuy* profile**
- **Create punchout, non-catalog, and hosted catalog orders**
- **Approve requisitions**

Lesson 1: Introduction to iBuy

1.1: Purchasing Methods

UIUC and UIS only

The University offers three systems that can be used to purchase commodities and contractual services from external vendors **Banner**, **iBuy**, and the MasterCard™ University Procurement Card (P-Card).

- The Office of Business and Financial Services (OBFS) recommends using **iBuy** or P-Card, for allowable purchases up to \$4,999.99
- Purchases at or more than \$5,000, non-allowable purchases up to \$4,999 or when a P-Card is not accepted are preferred to be submitted using a **Banner** Requisition Form. **Banner** is the system of record for **iBuy** Purchase Orders.
- UIUC and UIS require a **Banner** requisition for non-conforming orders, all renewals, solicitations, two-party agreements to facilitate reporting, and to accommodate payment terms other than net 30 or shipping terms. Please see UIUC Shipping instructions on the OBFS Purchasing website: <https://www.obfs.uillinois.edu/purchases/purchases-types/po-shipping-terms-urbana-campus/>.

UIC only

The University offers two primary systems that can be used to purchase commodities and contractual services from external vendors: **iBuy**, and the MasterCard™ University Procurement Card (P-Card).

- The Office of Business and Financial Services (OBFS) recommends using **iBuy** or P-Card, for most purchases up to \$4,999.99
- **iBuy** must be used for all requisitions with standard (net 30) payment terms.
- **Banner** must be used for 1) any orders with non- net 30 payment terms, e.g. if a deposit/pre-payment is required and 2) non-conforming orders.

1.2: Description of iBuy

iBuy is an online marketplace for purchasing goods and services at the University of Illinois System.. It allows you to create orders/requisitions and to buy the items you need. **iBuy** is set up like other online shopping sites to make it easier for you to navigate.

This training focuses on using **iBuy**, but it's important to also familiarize yourself with the procedures, rules, and regulations that govern the purchasing process. For additional information on purchasing, please see <https://www.obfs.uillinois.edu/purchases/> or contact your campus Purchasing division.

1.3: Advantages of iBuy

- **Better pricing for University**
 - **iBuy** contains a virtual warehouse of vendor catalogs. Strategic contracts exist with University vendors and the University is given discounts off of large groups of items. The more you buy from these catalogs, the better the University's discounts will get.
- **Saves time**

- When setting up a requisition, there are fewer screens than purchasing from **Banner**.
- **Simplifies requisition process**
 - Allows setup of default profile information.
 - Allows copying previous requisition information to a new cart.

1.4: iBuy Roles

There are several roles within **iBuy**.

Shopper

A Shopper can create a requisition and submit it for approval except adding C-FOAPAL information. When a Shopper submits a requisition, it moves into the Department Account Coder (DAC) queue for their assigned Chart/Org so that the C-FOAPAL information can be entered. Generally, the Shopper role is not combined with any other role.

The Shopper role is often used in large departments that have a central business office handling all accounting functions. Users out in the units are Shoppers. Shoppers choose their items and the requisition automatically routes to the unit business office to the Department Account Coder.

Department Account Coder

A Department Account Coder (DAC) can add C-FOAPAL information to complete a requisition initiated by a Shopper. Once the appropriate C-FOAPAL information has been entered and the requisition submitted, the requisition then moves into the approval queue linked to the Chart/Org entered within the C-FOAPAL information. There may be more than one user setup as a DAC within a queue for a particular Chart/Org.

The DAC role can be combined with the Requestor or Approver roles. It is advised for departments to have at least two people assigned to the role of DAC.

Requestor

A Requestor can do everything necessary to create a requisition and submit it for approval including adding the C-FOAPAL information. When a Requestor submits a requisition, it moves into the approval queue linked to the Chart/Org entered within the C-FOAPAL information.

The Requestor role can be combined with the DAC or Approver roles. However, it is University best practice for the same user to not create and approve the same requisition.

Approver

An Approver can approve, reject, edit, return or forward a requisition within their approval queue. The Approval queues are set up by dollar ranges with a particular Chart/Org. There may be more than one user setup as an Approver within a queue for a particular dollar range and Chart/Org.

The Approver role can be combined with the Requestor or DAC roles. It is advised for departments to have at least two people assigned to the role of Approver. However, it is University best practice for the same user to not create and approve the same requisition.

Executive Approver

An Executive Approver is styled after the more traditional **Banner** approval role. An Executive Approver can only approve, reject, or return requisitions (but not edit them) within their approval queue.

Query Only

The Query Only role can only review requisitions, purchase orders, and invoices for validation of account or report reconciliation. Unable to perform any other actions on a requisition.

The Query Only role cannot be combined with the Requestor role.

Invoice Acknowledger

An Invoice Acknowledger can approve, return, or forward invoices within their approval queue. This role will only acknowledge invoices with line items over \$5,000 on vendors set up with e-invoicing. For a list of these vendors please see types of vendors <https://www.obfs.uillinois.edu/iBuy/overview/vendors/>.

This role can be combined with the Requestor or Approver roles. Advised to have at least two people assigned to the role of Invoice Acknowledger in each department.

Access to **iBuy** must be requested through your Unit Security Contact (USC).

You can have multiple roles within the **iBuy** application. For example, you can be a Requestor and an Approver or Department Account Coder and a Requestor. The exception is the Shopper and the Department Account Coder as you cannot be both of those. If you need those functions, then you should have the Requestor role instead.

Lesson 2: Navigating iBuy

This is the *iBuy* homepage.

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

Office of Business and Financial Services

Share: Search

iBuy (online purchasing)

[Job Aids & Training Materials](#) | [FAQs](#) | [Who To Ask](#)

iBuy (online purchasing) OBFS Home > iBuy (online purchasing)

What's NEW

Overview
Get Started
Reporting
About the Project
Give us your feedback

Related Links:

Purchases
Procedures & Rules
Other Ordering & Payment Methods
 Banner Orders
 Cash Purchases
Reports

iBuy

iBuy - An online marketplace for purchasing goods and services at the University of Illinois, iBuy combines the use of Internet technology with procurement best practices to simplify the purchasing process and reduce costs.

Why iBuy?

- **iBuy** provides easy access to [vendor catalogs](#) with University negotiated pricing, offers detailed historical purchasing reports, and [integrates with Banner](#).
- **iBuy** facilitates complex approval requirements via its [electronic workflow management tool](#).
- **iBuy** offers intuitive, commodity-specific search, selection, and requisitioning tools designed to streamline purchasing processes while ensuring the best value to the user.

How iBuy works?

iBuy presents an easy, user-friendly shopping experience, allowing users to shop on-line, select items, place items in an electronic shopping cart, and submit their requisition. Read the [iBuy Overview](#) section of the website to learn more about [roles](#), [vendors](#), [the approval process](#), [Banner integration](#), and more.

Please [contact us](#) for more help.

Last Updated: January 28, 2014

This site provides users of the University of Illinois' e-procurement system (iBuy) with information about and support for the system. iBuy offers easy, convenient shopping with University-approved vendors at negotiated prices. Access is secured to authorized University of Illinois faculty and staff only and use of the system is strictly limited to purchases required in the conduct of official University business.

iBUY

Login to iBuy

Policy Manual

- [Section 7 - Purchasing](#)

Helpful Links

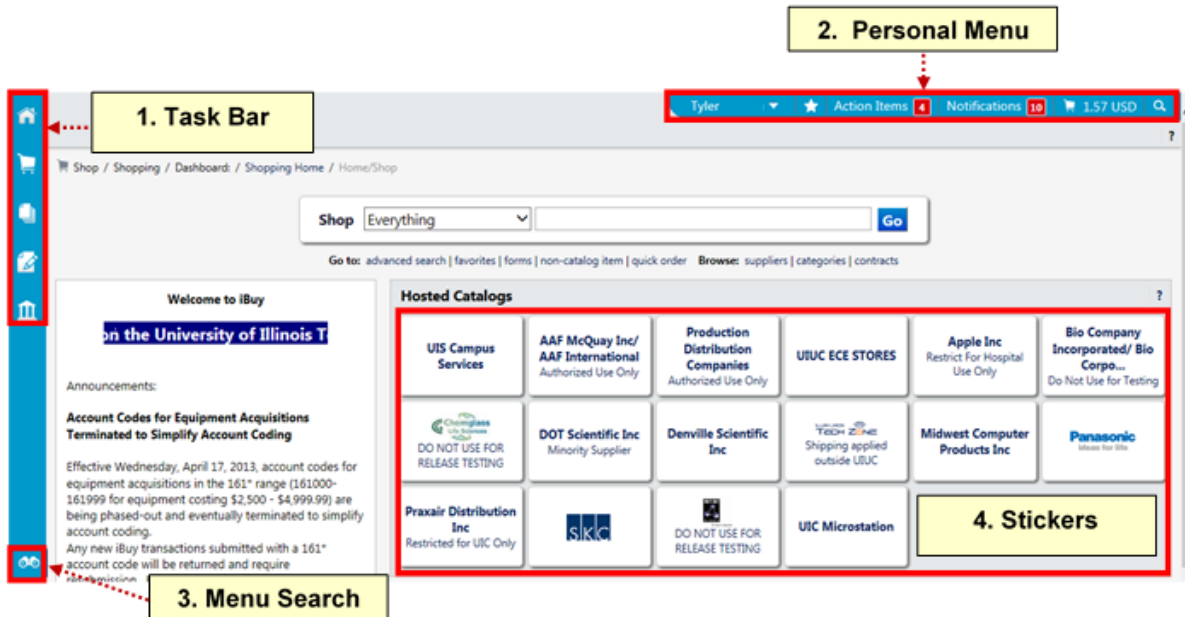
- [Procurement Contracts Search](#)
- [Commodity Codes](#)
- [Purchasing Process Overview](#)
- [Payments to Vendors and Students](#)

Current Announcements

- **OBFS Office Closings**
OBFS offices on the Chicago campus (excluding USFSCO Customer Service in SS...
- **September Training Sessions Available**
New training opportunities are now posted on the OBFS Calendars (<http://www...>)
Sign up for e-mail updates!

Office of Business and Financial Services
OBFS Home | [News Center](#) | [Site Map](#) | [Content Editor/Approver Login](#)
[University of Illinois](#) | [Chicago Campus](#) | [Springfield Campus](#) | [Urbana-Champaign Campus](#)
© Copyright 2012 The Board of Trustees of the University of Illinois | [Web Privacy Statement](#)
Please [send us your questions or comments](#) about this website.

iBuy Instructor-led Training



1. Task Bar

- Home
- Shop
 - Shopping
 - Search
 - Dashboard
 - Shopping Home
 - Go To
 - Advanced Search
 - View Favorites
 - View Forms
 - Non-Catalog Items
 - Quick Order
 - Browse By
 - Suppliers
 - Categories
 - Contracts
 - My Carts and Orders
 - Open My Active Shopping Carts
 - View Draft Shopping Carts
 - View My Orders (Last 90 Days)
- Orders and Documents
 - Document Search
 - Search Documents
 - View Saved Searches
 - Download Export Files
 - Approvals
 - My Approvals
 - Approval Notifications
 - My Recent Approvals
 - Assign Substitute Approvers

- Catalogs and Contracts
 - View Contracts
 - Search for Contracts
- Accounts Payable
 - Invoices & Receipts
 - Search for Invoices

2. Personal Menu

- User Drop-down Menu
 - View My Profile
 - Set My Home Page
 - Log out
 - My Pending Requisitions
- Bookmark
- Action Items
 - Unassigned Approvals
 - Orders
- Notifications
- My Cart
- Quick Search

3. Menu Search

4. Stickers

Lesson 3: Setting Up Your iBuy Profile

3.1: iBuy Profile Benefits

Setting up your profile will save you time in the future because you won't need to completely reenter that same information on every order. However, it will take some time to setup your profile.

3.2: Steps to Setting Up Your Profile

Select the drop-down by your name at the top right of the page to access profile settings.

Click **View My Profile**.

Information under the **User Profile and Preferences ~ User's Name, Phone Number, E-mail, etc.**, and **User Roles and Access ~ Assigned Roles** should be reviewed for accuracy. Updates to your phone number or e-mail must be done through your Unit Security Contact (USC) with the exception of the items detailed below.

E-mail Approval Code (Approver Role Only)

NOTE: If you have the Approver role and wish to approve via e-mail, it is required that an e-mail approval code be established.

Step	Task
1.	Click User Name, Phone Number, E-mail, etc. , under User Profile and Preferences .
2.	Enter the code in the E-mail Approval Code field (self-defined; at least 4 characters).
3.	Click Save .

Display Settings

Step	Task
1.	Choose a color theme to customize the display.
2.	Select accessibility mode to turn on helpful pop-ups.
3.	Click Save .

Edit Notification Preferences (previously E-mail Preferences)

Step	Task
1.	Click Notification Preferences .
2.	Default Notification Preferences are based on Assigned Roles and are indicated with a green check mark. These may be changed by clicking Edit Section . NOTE: It is recommended to turn it on anywhere you see the word <i>rejected</i> . If the system rejects or returns a requisition, you will get an e-mail notification.
3.	Click Save Changes after any modification has been made.

Set Default Ship-To Address

Step	Task
1.	Click Default User Settings .
2.	Click Default Addresses .
3.	Click Select Addresses for Profile .
4.	Enter the Banner 6-digit Ship-To Code or Chart and first 3 digits of Org Code (without the dash) under Nickname/Address Text .
5.	Click Search .
6.	Select your address.
7.	Type a value in the required Location field (e.g., building name, room/phone number, e-mail address) and Phone field.
8.	<p>Click Save.</p> <p>NOTE: Add additional Ship-To addresses following the steps above but do <u>not</u> check the Default box.</p> <p>NOTE: If your address is not in iBuy, complete the Banner Ship To Address Add Form on the OBFS Purchases form website https://www.obfs.uillinois.edu/forms/purchases/</p>

Edit FOAPAL Codes

It is your responsibility to edit your FOAPAL codes in **iBuy** to charge the correct accounts.

NOTE: Shoppers cannot edit FOAPALS.

NOTE: State funds that begin with a 1 do not automatically update at the end of the year. If your default fund is for example, 100014, on July 1, you need to go in and change it to 100015. If you forget to change it, any order that you create as of July 1 is going to be rejected because the fund is no longer available.

Step	Task
1.	Click Default User Settings .
2.	Click Custom Field and Accounting Code Defaults .
3.	Click the Codes sub-tab.
4.	Click the segment's Edit button.
5.	Click Create New Value .
6.	<p>Enter in the <i>Search For Value</i> section at least a portion of the:</p> <ol style="list-style-type: none"> Value in the Value field, or Description in Description field. Click Search.
7.	<p>Select the appropriate choice in the <i>Values Found</i> section.</p> <p>! IMPORTANT: It is recommended to select the option that contains the appropriate Chart indicator for your campus. Note that -1 represents the Urbana campus; -2 represents the Chicago campus; -4 represents the Springfield campus.</p>

iBuy Instructor-led Training

Step	Task
8.	Click Add Values . ! IMPORTANT: N/A is the default for Index Code. If a valid index code is used, do not enter chart, organization, fund, or program.

Make a FOAPAL Default Value

If you primarily only use one FOAPAL, you can set that FOAPAL up as your default FOAPAL. This FOAPAL will automatically appear on each cart that you create.

Step	Task
1.	Click Edit .
2.	Click the value in the box to the left.
3.	Select Default .
4.	Click Save ; the default value displays as bold.

Add a FOAPAL as a Code Favorite

Adding a FOAPAL code favorite will allow you to save your commonly used FOAPALS for easy access. These favorites will not automatically appear in each cart like the FOAPAL default value, but you will be able to easily access these FOAPALS.

Step	Task
1.	Click the Code Favorites sub-tab.
2.	Click Add .
3.	Type a name for the string in the Nickname field.
4.	Use the Select from all values to search for the desired value for each segment. ! IMPORTANT: It is recommended to select the option that contains the appropriate Chart indicator for your campus. Note that -1 represents the Urbana campus; -2 represents the Chicago campus; -4 represents the Springfield campus.
5.	Click Save .

Make Code Favorite Default Value

If you primarily only use one favorite FOAPAL, you can set that FOAPAL up as your default favorite FOAPAL.

Step	Task
1.	Click Edit .
2.	Select the Default option.
3.	Click Save .

You can find a copy of all *iBuy* job aids on the OBFS website.

Lesson Review

Let's practice what we have learned. In this lesson we will:

- Update your profile and preferences
 - Add default FOAPALS
 - Add shipping addresses
1. Change your user profile and preferences by updating the language, time zone, and display settings. Change the color to Banana Republic.
 2. Add additional FOAPALS to your Code Favorites.
 - a. Chart 1 Samples
 - i. Example 1: 1-200250-344000-127010-344001 Set as Default
 - ii. Example 2: 1-495812-413006-124000-191100
 - iii. Example 3: 1-301832-244011-124900-244036
 - b. Chart 2 Samples
 - i. Example 1: 2-301020-577000-147700-577015 Set as Default
 - ii. Example 2: 2-301119-876000-187100-876003
 - iii. Example 3: 2-497711-509000-124000-191100
 - c. Chart 4 Samples
 - i. Example 1: 4-301035-626000-146400-626007 Set as Default
 - ii. Example 2: 4-497965-583000-143304-191200
 - iii. Example 3: 4-599765-967000-142500-191200
 3. Add new default shipping address.
 - a. Chart 1: 118251, Wohlers Hall, 506 S Wright St
 - b. Chart 2: 220710, UH, 601 S Morgan St
 - c. Chart 4: 4CRC01

Lesson 4: Creating iBuy Orders

4.1: Types of Orders

There are several different types of vendors available in **iBuy**. Hosted and Punchout vendors are both contracted vendors.

Catalog Orders

Hosted

Hosted vendors give the University a list of items and prices that are loaded into **iBuy**. All of the shopping, reviewing, and searching is done in **iBuy**.

Punchout

With Punchout vendors, you click on a link to access their website in a separate window which shows our contracted items and pricing, you click to add your items, and then go back to **iBuy** to complete your requisition.

Non-Catalog Orders

Non-Catalog vendors are vendors for which we don't have a strategic contract in place with, but that you can still purchase from. When creating a Non-Catalog order, it is the responsibility of the Requestor to provide all of the information including item numbers, pricing, quantity, packaging and description. Purchasing recommends that shoppers get quotes from these vendors to help with the data entry.

Internal

There are vendors who are internal to the University (e.g., campus stores, ECE stores, and i-Stores). Internal vendors are setup in the system as either Hosted or Punchout vendors.

E-Invoicing

E-Invoicing vendors are either Hosted or Punchout catalog vendors. They send their invoice data electronically into **iBuy**. This makes the invoicing process very simple. The invoice comes in and if it matches exactly what's on the purchase order then it goes directly to Payables for the payment automatically. If there is a difference or discrepancy between the two, then the invoice forwards to a Payables processor who can review, locate the discrepancy, and determine whether it's appropriate or not.

To setup e-Invoicing, a vendor must already be available in **Banner** because **Banner** is the financial system of record. If the vendor is already available in **Banner**, send an email to uivendor@uillinois.edu and ask them to sync the vendor into **iBuy**. If the vendor is not yet setup in **Banner**, then you need to go through vendor setup by asking the vendor to complete the information form, the send the form to University Payables vendor maintenance, and the vendor will be setup in **Banner** and an automatic sync the vendor information to **iBuy**.

! IMPORTANT: Only one vendor per order is allowed. Split a multi-vendor order by selecting all the items to one vendor and then move them to another cart.

4.2: Creating a Punchout Catalog Order

Begin by:

- Creating a Cart, or
- Immediately searching for items

To create a cart:

Step	Task
1.	Hover over the Shopping Cart icon on the left-side task bar.
2.	Hover over My Carts and Orders .
3.	Click Open My Active Shopping Cart .
4.	Click Create Cart .
5.	Enter Cart Name in the text box or accept default.
6.	Provide a Description (optional).
7.	Set Priority (optional).
8.	Click Save .
	Note: There are benefits to naming a cart. Those benefits are that you can search for a requisition based on the requisition name/cart name.

To add products to the cart:

Step	Task
1.	Click Continue Shopping or Add Non-Catalog Item .

You can click on a Punchout or Hosted catalog sticker and begin shopping, or to search for items, use the various **Search Methods**.

To order Punchout items:

Step	Task
1.	Find the appropriate item(s). NOTE: The “c” symbol behind the price means it is an item on our contract. Punchout catalogs also include items for which there is no specially contracted price. With good ordering history, the University can then negotiate pricing on frequently ordered items.
2.	Enter the item Quantity . NOTE: Be careful how items are packaged (e.g., box of copy paper vs. ream of copy paper).
3.	Click Add to Cart . Click the X item(s) added, view cart confirmation link or the Cart link in the top right corner to access the Active Cart.
4.	Click Checkout to return to iBuy .

iBuy Instructor-led Training

Step	Task
5.	<p>Verify and alter information as needed:</p> <ol style="list-style-type: none"> a. Enter FOAPAL information. ! IMPORTANT: Shoppers do not have access to edit FOAPAL codes. b. Enter Cart Name. NOTE: If no name is entered, it will automatically enter the date, your name and a cart number by default. Cart names are useful for tracking orders. c. Change Priority, if needed. NOTE: Changing the Priority from normal to urgent flags the shopping cart in the Approval queue but doesn't move it any faster through the process. d. Change On Behalf Of information, if needed. e. Shipping Tab: <ul style="list-style-type: none"> • Edit the Shipping Address or select from drop-down multiple addresses entered in your profile. • Recommended: Do not change delivery options. • Recommended: Do not enter requested delivery date. f. Billing Tab: <ul style="list-style-type: none"> • Tab is not editable. • Cannot charge to P-Card. • Recommended: Leave Accounting Date blank. g. Accounting Codes Tab: <ul style="list-style-type: none"> • Enter a code favorite. • Option to split FOAPALs. WARNING: Not a simple concept. Call Purchasing if in doubt. h. Summary Tab: <ul style="list-style-type: none"> • Internal notes – can be seen by any <i>iBuy</i> users. Used primarily for notes to the Approvers. • External notes – can be seen by any <i>iBuy</i> users and will be printed on the purchase order that goes to the vendor. Quotes should be attached as external notes for the vendor to see. ! IMPORTANT: Quotes are important if items do not come out of the catalog to verify details and pricing. • View line item, vendor, details and symbols. i. Requisition Approvals Tab: <ul style="list-style-type: none"> • Shows workflow for approvals. • Purchasing department list will be entire department until it is assigned to someone.
6.	Click Place Order .

Once in Punchout catalog, Shoppers have the ability to select options to see previous orders or commonly ordered items.

Lesson Review

Let's practice what we have learned. Create an order purchasing pens and paperclips from OfficeMax.

4.3: Creating a Hosted Catalog Order

- **Shop at the Top** searches Hosted and Punchout catalogs.
- Click on sticker to bring up **Search** function.
- Some hosted catalog items have images just as in Punchouts.
- Level 2 Punchout vendors – ability to search their catalog without going to it.
- Rest of process similar to Punchout process.

4.4: Creating Non-Catalog Orders

There are several different forms that are used to create non-catalog orders. This section will focus on two of the most commonly used ones: 1) Non-Catalog Form; and 2) Route to Purchasing Form. Obtaining a quote makes it easier to fill out the form. There are additional non-catalog forms based on special purchase needs (e.g. Controlled Substances).

Non-Catalog Form

- Any order under \$5,000 will go out to a vendor without review by Purchasing.

Route to Purchasing Form

Purchasing's function in the order process is to assist departments with buying they need to, within the confines of laws, regulations, and policies (e.g. Illinois Procurement Code). The **Route to Purchasing Form** ensures that certain purchases go to Purchasing for review, regardless of dollar amount.

The **Route to Purchasing Form** must be used when placing an order of any dollar amount that:

- (1) requires an authorized University of Illinois System signature on a document or
 - (2) includes or required any of the items listed below.
- Rental Agreements
 - Any Purchase requiring an Authorized Signature
 - Any Vendor Terms and Conditions different from the U of I Terms and Conditions
 - Any Vendor Contract or Agreement that goes with the order that would need reviewed
 - Any shipment that goes through Customs
 - Telecommunications Equipment
 - Weapons and Ammunition
 - Furniture
 - Charter Air or Bus Service
 - Lab or Specialty Gases
 - Laboratory or Office Moving (External Vendor)
 - Onsite Services
 - High Power Lasers
 - Non-Denatured Ethyl Alcohol

To order a non-catalog item:

Step	Task
1.	Click the Non-Catalog Form sticker in the University Forms section of <i>iBuy</i> .
2.	Enter supplier's name in the Enter Supplier textbox (note there is an auto-complete feature). NOTE: The supplier's name must be typed as it is in Banner ; for an advanced search of suppliers: <ul style="list-style-type: none"> a. Click Supplier Search link. b. Enter the supplier's name or a portion of the name. c. Click Search. d. Locate the supplier's name and click the Select link.
3.	Enter accurate information in the <i>General Info</i> section for: <ul style="list-style-type: none"> • Catalog No. • Product Description • Quantity • Packaging • Estimated Price • Commodity Code – required * <p>! IMPORTANT: Entering accurate information is imperative to match to the vendor's invoice for payment purposes.</p> <p>* If the Commodity Code is unknown:</p> <ul style="list-style-type: none"> • Click the search... link next to the Commodity Code text box. • Enter a partial Commodity Code (e.g., 64) or Description (e.g., <i>paper</i>). • Click Search. • Locate the commodity and click the Select link.
4.	Select Add to Cart and Return in the Available Actions drop-down.
5.	Click Go . NOTE: The Vendor Information section is pre-populated with the previously selected supplier's information.
6.	Repeat steps 3 through 5 until all desired items have been entered.
7.	Select Add and go to Cart in the Available Actions drop-down.
8.	Click Go . NOTE: The form closes and navigates to the Active Shopping Cart.
9.	Review the cart and make any necessary changes. NOTE: You can update the Cart Name, Description, and Priority for your reference.
10.	Click Proceed to Checkout .
11.	Review the draft requisition and edit as appropriate.

Lesson Review

Let's practice what we have learned. Create a non-catalog order by purchasing an item using the following information:

- Vendor: Ace Glass Inc
- Catalog Number: 80-15978

iBuy Instructor-led Training

- Product Name/Description: Surge & Noise Power Strip
- Quantity: 10
- Unit of Measure: 1 / EA-Each
- Price Estimate: \$104.82
- Commodity Code: 49000

Lesson 5: Approving iBuy Requisitions

5.1: Approver Roles

An Approver in *iBuy* has more permissions than the Approval role in *Banner*. An *iBuy* Approver can approve or reject requisitions but can also edit, return and forward a requisition to another user. If there's a small change that needs to be made, the Approver in *iBuy* can fix it and continue it on its way instead of having to send it back. Approvers also have the ability to send the requisitions back by returning it to the requestor.

5.2: Approver Options

Approvers should carefully review orders before approving them.

Things you can do with an order, as an Approver:

- edit an error in the FOAPAL
- edit an error in a line item
- return it to the shared folder
- place it on hold
- return it to the requisitioner for changes or to be withdrawn
- forward it (also forwards your approval authority)
- add comments or attach documents
- withdraw or reject it (effect is the same, but message it sends is different)
- approve all or part of a requisition

NOTE: Make sure to assign the order to yourself to get the full menu options.

Step	Task
1.	Hover over the Orders & Documents icon on the left-side task bar.
2.	Hover over Approvals .
3.	There are four options available: My Approvals , Approval Notifications , My Recent Approvals , and Assign Substitute Approvers .

My Approvals

Step	Task
1.	Click the My Approvals sub-page.
2.	Click Expand All to show contents of all folders.

iBuy Instructor-led Training

Step	Task
3.	Click the left arrow (to left of folders) to hide filters.
4.	Click one folder to expand the contents.
5.	Click Collapse All and click a specific folder.
6.	Click the drop-down next to Group Result By to display by Folders or in a List. List will show ALL approvals assigned to you.

Filter

Step	Task
1.	Choose a Filter element to view only those items included in the filter. Any filter items chosen will be in the Filtered By box (upper left).
2.	Click the appropriate check box to deselect and remove a filter. The Assigned and Unassigned filters will help to quickly identify unassigned requisitions and make assignments.
3.	Filter by documents with attachments or without.

Aging

Step	Task
1.	Aging information is available for each requisition.
2.	At the top of the approvals list, note the feature to sort by values.

Lesson Review

Let's practice what we have learned. Review a previously submitted requisition and approve it.

5.3: Executive Approver Options

An Executive Approver is styled after the more traditional **Banner** approval role. The Executive Approver only approves or rejects requisitions.

5.4: Overview of Approval Process

1. **Complete a requisition.**
2. **Banner validation** – **Banner** is going to check that it has valid FOAPAL segments, that state funds are not mixed with any other funds and that there's no FOAPAL sequences listed at zero.

iBuy Instructor-led Training

3. **Departmental approval queues** – The departmental approval queues are modeled after the approval queues in **Banner**. If you are in an approval queue in **Banner** it doesn't automatically put you in the same approval queue in **iBuy**. The setups are completely different as they are two different systems. There are a couple of optional queues available in **iBuy**: \$0-5,000 and \$5,000-10,000.
4. **Special approvals** – If you're using certain grant funds, your order may route to Grants and Contracts. If you're buying IT equipment it might route to an IT department for review.
5. **Purchasing, if needed** – If ordering out of the catalogs, whether it's Hosted or Punchout, you can order up to \$100,000 without your order going through Purchasing. These catalogs and contracts have already been created and have gone through the solicitation process per the procurement code. If you're using a Non-Catalog order under \$10,000, the workflow will not route to Purchasing unless you use a different form.
6. **Banner PO processing** – It's going to again validate your FOAPAL and makes sure you aren't improperly mixing asset and non-asset accounts or that you don't have any lines or FOAPAL splits that aren't adding up. It also checks if changes were made by the Approver. It's going to get a **Banner** PO number (unless it's an internal vendor).
7. **PO to vendor** – Uses electronic fax or email distribution (no paper generated).

Course Summary

Course Objectives

Now that you have completed this course, you should be able to:

- ◆ **Navigate *iBuy***
- ◆ **Modify an *iBuy* profile**
- ◆ **Create punchout, non-catalog, and hosted catalog orders**
- ◆ **Approve requisitions**

Appendix A: OBFS Resources

OBFS Training Center

The OBFS Training Center aims to meet campus units' needs for training, knowledge, and understanding of the OBFS systems, policies, and processes. From their web site, you may access information on types and availability of courses, register for classes, access online training, and download training materials. Visit the OBFS Training Center at <http://www.obfs.uillinois.edu> and click the **Training Center** link. Then check out these helpful links:

- Click the **Course Registration** link to register for an OBFS training course.
- Check the **Curriculum Guide** to help identify OBFS courses and prerequisites you should take.

OBFS News Center

If you wish to receive announcements from the OBFS functional unit sponsoring the content of this course, subscribe to the Accounting and Financial Reporting announcements at the OBFS News Center as outlined below:

OBFS Home Page: <http://www.obfs.uillinois.edu>

- > **Sign up for e-mail updates!** (See the link on the lower right side of the page.)
- > Fill out the form and be sure to select the following topic: **Procurement**

Appendix B: Support and Resources Summary

For further information, please visit the Who To Ask page on the OBFS *iBuy* website
<https://www.obfs.uillinois.edu/iBuy/who-to-ask/>