UNIVERSITY OF ILLINOIS SYSTEM

Completing the Purchase Requisition Form

The Purchase Requisition Form creates an electronic requisition used:

- To order items from suppliers that do not have a Hosted or Punchout catalog.

- To order items not offered in suppliers' Hosted or Punchout catalogs.

    - **NOTE:** If you are creating an order for items not offered in a suppliers' Hosted or Punchout catalog, it is advised to obtain a quote from the supplier representative that details the **Catalog Number**, **Product Description**, **Quantity**, **Packaging**, and **Price**. Entering these details exactly as the supplier provides them in important for successful invoicing within iBuy. This process should not be used if the supplier creates an e-quote through the catalog.

- For orders that require a contract or for the university to agree to vendor terms and conditions.

- To order goods or services that are restricted as detailed in Policy & Procedures Manual, Section 7.2 Purchase of Goods & Services, Additional Resources. Examples include but not limited to: telecommunication equipment, weapons, furniture, chartered services, lab gases, on-site services, high-powered lasers, or non-denatured ethyl alcohol.

- For goods purchased from another country that will need to go through Customs.

- To order items that are a radioactive or controlled substance.

The Purchase Requisition Form should **not** be used:

- To place nonconforming orders. Nonconforming orders should be processed on a Banner requisition form.

Based upon your responses to the questions within the form, you will be prompted to answer and provide more details.

1. On the iBuy homepage under the **University Forms** section, click **Purchase Requisition Form**.

2. Review the instructions and click the job aid link for more information.

3. Click **Next**.

4. Enter the Supplier Name or Supplier ID (@########) in the **Supplier** field.

    a. **NOTE**: Do not populate the other fields.

5. Click **Search**.

6. Select the Business Purchases address.

    a. **NOTE**: By default, the preferred BP address will be bold and selected. Unless otherwise instructed, this should be the address used.

7. Click **Next**.

8. Click **Next** on the **Form Fields** page. There is no action required.

9. Answer the following questions about the purchase request:

   a. ***Does this purchase require a contract to be signed by the University or must the University agree to the supplier's Terms & Conditions?*** **Yes** or **No**.

      - If No, A link to the **Restricted Items and Purchases Requiring Special Approval** on the OBFS website will be provided.

      - If Yes, the following questions need to be answered.

         ▪ If a contract needs to be signed by the University, has a Contract Request Form been submitted?

            - If No, Please create and submit a Contract Request Form if you have access to Contracts+ before proceeding.

            - If Yes, Please include the Contract Request Form Number in the appropriate field under Internal Notes and Attachments on the requisition.

   b. ***Is there a leasing component or software subscription in this contract that is 12 months or more including renewal options?***

   c. ***Is the purchase for goods or services restricted as detailed in purchasing Section 7.2, Policy & Procedures? Examples include but not limited to: telecommunication equipment, weapons, furniture, chartered services, lab gases, on-site services, high-powered lasers, or non-denatured ethyl alcohol.*** **Yes** or **No**.

   d. ***Is this purchase for goods from another country that will need to go through Customs?*** **Yes** or **No**.

   e. ***Does this purchase include goods or services that are provided over a period of time/range of dates? Examples include maintenance agreements, software license agreements, subscriptions, standing orders etc.***

      - If Yes, provide the estimated beginning start date of service/delivery

      - If Yes, provide the estimated end of date of service/delivery

For **Radioactive Substances**:

- ***Does this order contain Radioactive Substance products?***

   - If **No**, no additional information needed.

   - If **Yes**, enter information in the following fields:

      - **Project/Permit Number**

- **Principal Investigator (PI)**

- **Radioactive Materials Type**

  - **Long Life: Having a half life greater than or equal to 90 days**

  - **Short Life: Having a half life less than 90 days**

10. Click **Next**.

11. In the **Quantity** drop-down, select the number of line items on the requisition.

    a. **NOTE**: If requisition has more than 10 items, create a single line item with the total cost of requisition and attach supplier quote to requisition. Based upon the number selected from the drop-down menu, the form will provide enough fields for up to 10 items.

12. Enter information in the following fields:

    a. **Unit Price**

    - **Quantity**

    - **Unit of Measure**

      - **NOTE**: This is usually **EA - Each**.

    - **Product Description** (important to match what is provided by the supplier. Should be less than 50 characters to accommodate banner and avoid unique characters).

    - **Catalog No.** (important to match what is provided by the supplier)

    - **Commodity Code**

      - Click **Edit** next to the **Commodity Code** field.

      - Enter a partial Commodity code (example: 640XX) or description (example: Bags).

      - Click **Search**.

      - Click **Select** for the appropriate Commodity code.

13. Answer the following question about the **Freight/Shipping Charges**: *Does this order contain Freight/Shipping Charges?*

    a. **NOTE**: Adding freight costs to your order indicates that the University is responsible for payment of Freight/Shipping Charges. Even if the amount entered is an educated guess, it is important to populate this field. If Freight/Shipping Charges are not entered, it is assumed the Supplier invoice will not have freight charges, and the University will not be paying any freight costs. If there are multiple shipping fees, the Freight/Shipping Charges line should be a sum of all shipping costs for this order.

- If **No**, no additional information needed.

- If **Yes**, enter information in the **Unit Price** field.

14. Click **Next**.

15. Answer the following question about the Purchase Information: ***Is your order $10,000 or more?***

- If **No**, no additional information needed, unless your order falls within the guidelines of the bullet point below. This applies regardless of the amount of the requisition.

    - If this purchase is based on a Bulletin posting (for RFP, IFB, Sole Source, Exemption, Cooperative) or Contract, please fill in the **Bulletin Number** and/or **Contract Number** in the **Internal Notes and Attachments** section of the Requisition.

- If **Yes**, answer the following question: ***Were three quotes obtained from different competitive sources?***

    - If **Yes**:

        - **Written, email, or faxed quotes should be attached to the requisition; detail verbal quotes in Internal Notes of the requisition with date, vendor contracted, and quoted price; Internet searches should identify websites or links providing vendor and pricing.**

        - **Was at least one quote obtained from a diverse vendor? Yes** or **No**. Certified BEP Directory

    - If **No:**

        - **Select the reason why multiple quotes were not possible from the following options (and provide additional information in the Internal Notes as appropriate).**

            - **Supply/service is not available from multiple vendors**.

                - If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the **Bulletin Number** and/or Contract Request Number in the Internal Notes and Attachments section of the Requisition.

        - **Purchase is being made from an awarded contract.**

            - If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the **Bulletin Number** and/or **Contract Request Number** in the **Internal Notes and Attachments** section of the Requisition.

        - **Urgent need for the supply/service that does not allow time to obtain multiple quotes.**

- If this purchase is based on a Bulletin posting (RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the **Bulletin Number** and/or **Contract Request Number** in the **Internal Notes and Attachments** section of the Requisition.

- **Other (Provide Justification Below)**

  - If quotes were not obtained, provide qualifying information within the provide box.

16. Click **Next**.

17. The **Review and Submit** requisition screen will appear. There is no action required. Click **Add and go to Cart**.

    a. **NOTE**: To edit the requisition, refer to **Edit the Requisition Before Submitting the Order** section below.

18. Click **Proceed to Checkout**.

19. Review the cart and make any necessary changes.

20. Enter information or add attachments in the **Internal Notes and Attachments** section, if needed by clicking the pencil icon to edit the fields or add notes and click **Add** to include an attachment.

    a. **NOTE**: If this purchase is based on a Bulletin posting (for RFP, IFB, sole source, exemption, cooperative) or contract, please fill in the **Bulletin Award Number** and/or **Contract Number** in the **Internal Notes and Attachments** section of the Requisition.

21. Click **Save Changes**.

22. Click **Place Order** on the right-hand side of the screen.

Editing the Requisition Before Submitting the Order

23. Under the supplier details on the Summary page of the requisition, click **Purchase Requisition Form** blue link.

24. Click the section of the form you need to edit.

    a. **NOTE**: Much of what would be editable is within the **Order Details** section.

25. Edit and click **Save Progress**.

26. Click **Back to Cart** on the top left corner of the Purchase Requisition Form.

    a. **NOTE**: Do not click save and move back through the form otherwise you could duplicate the line items on the order.

Using an Alternative Shipping Address

1. Under the **Shipping** section, click **Edit** (pencil icon).

2. Enter the appropriate address by applying one of the following options:

   - Option 1: **Choose from Your Addresses**

     - Select the radio button next to the address from the address options previously added.

       a. **NOTE**: Refer to the [Setting Up and Using Ship To Addresses job aid](#) to add additional address options to your profile.

   - Option 2: **Select a New Address**

     - In the search box below the list of current Ship To set up, enter a portion of the **Banner Ship to Code** or a portion of the address.

     - Click **Search**.

     - The address(es) will populate within your current address list. Select the radio button of the address you want to use.

3. Enter the ultimate destination in the **Location** field.

   a. **NOTE**: Information must be entered in the **Location** field. This can be a specific room number, a campus mail code, or an email address.

4. Click **Save Changes**.

Editing FOAPAL Codes

1. Under the **Accounting Codes** section, click **Edit** (pencil icon).

2. Enter the appropriate accounting code by applying one of the following options:

   - Option 1: Select from your code favorites by hovering over the right-hand corner of the pop-up window and click **Favorites** (heart icon).

     - Click from the list of saved nickname codes.

   - Option 2: Search by **Value** or **Description**.

     - Click the arrow within the box of the accounting code you need to change. You can type the number in the box, select from the values that are saved, or click **Search** to search by number or **Description**, or a portion of either **Value** or **Description**. Click **Add Split** (plus sign) to split FOAPAL codes and repeat steps 1-2 above.

       - Please note you cannot select a second favorite when splitting a FOAPAL. You must manually enter the second FOAPAL string.

       a. **NOTE**: For more information, see the [Splitting FOAPAL Codes job aid](#).

3. Click **Save Changes**.

Notes and Attachments

Internal Notes and Attachments will not go to the Supplier or Banner and can be shared between departments.

External Notes and Attachments will go to the Supplier, and **External Notes** will go to Banner.