iBuy Purchase Requisition Form and Standing Order Form Changes Live December 1.

Updated Job Aids available at [iBuy Training Materials](#).

- Shopping
    - Shopping Methods and Tips

- Requisition Creation
    - Completing the Purchase Requisition Form
    - Completing the Standing Order Form
    - Splitting Accounting Codes (C-FOAPAL)
    - Using Equipment and Non-Equipment Account Codes on the Same Requisition

- PO Change Request
    - Completing the PO Change Request Form

New Job Aid available at [iBuy Training Materials](#).

- Requisition Creation
    - FOP Code Information

Note that Help Text within the Purchase Requisition Form and Standing Order Form has been updated to provide additional information.

Overview of December 1 Updates

- There are updated and new required questions under the Order Information section within the Purchase Requisition Form
    - Have any goods already been received, or services performed for this requisition or is this order to accommodate a cancel and replace Purchase Order?
    - Do any items on your order require an equipment inventory Ptag?

- There is a change in how you add multiple lines within the Purchase Requisition Form and the Standing Order Form.

- The addition of the FOB Code selection in the Shipping section of the cart before submitting.

Taking actions within the Draft Cart (adjusting Shipping, applying the C-FOAP, removing lines or adjusting responses given in the form) has not changed, only the way you add lines to your order while in the Purchase Requisition Form or the Standing Order Form.

Why itemize on the Purchase Requisition Form or the Standing Order Form?

- The purpose of itemizing information on the order into separate lines instead of one line on the requisition is to support the processing of invoices in iBuy in the future with the Source2Pay project.
- There will be invoice processing issues if the vendor submits a lump sum invoice against an itemized PO.

General Topic Summaries based on the questions presented during Information sessions on November 29 & November 30.

Copying other requisitions

Do not copy requisitions that were generated before December 1. Create a new uncopied cart. This will ensure that the updated version of the either Purchasing Requisition Form or Standing Order Form is used. In addition, punchout catalog generated orders are not to be copied.

Cancel and Replace

Updated question in the Order Information section: Have any goods already been received, or services performed for this requisition or is this order to accommodate a cancel and replace Purchase Order? If you answer Yes, additional questions will be asked to gather information and the requisition will route to the After The Fact Purchasing queue for review.

- University Payables will notify you if the situation arises that you would need to cancel and replace a PO due to issues with invoice processing. Generally, it is when the vendor has changed their name between the time the original order was created and when they submitted an invoice.
- The new PO will have a different PO number.
- If you realize that an incorrect C-FOAPAL has been used on a PO, you may submit a Journal Voucher in Banner to make that correction.
- Create a new PO for yearly POs such as subscriptions, insurance policies or service renewals. These are not Cancel and Replace situations.

PTag question/Equipment Account code/Furniture Orders

New question in the Order Information section: Do any items on your order require an equipment inventory Ptag?

- Answer Yes for the following situations:
  - If the equipment you are ordering is moveable, meaning it can be moved from one location at the university to another, an equipment tag PTag will be required. Use an Equipment Account code starting with 127XXX or 163XXX within the C-FOAP for at the line level for each piece of inventoried equipment.
  - Whether the PTAG is issued by UPAR or the unit has unassigned PTAGS to use, use an Equipment Account code starting with 127XXX or 163XXX in the C-FOAPAL for that line item.
  - If you are purchasing items that will be added to an existing inventoried item (example ordering 5 more hard drives to add to a server array) and the purchase adds new functionality (something the existing piece of inventoried equipment could not previously preform) to an existing inventoried item. Add the information in the Comment box, "Adds new functionality to PTag…". Use an Equipment Account code starting with 127XXX or 163XXX in the C-FOAPAL for that line item and work with UPAR to add that purchase to the existing inventory item
- Answer No for the following situations:
  - For a repair and maintenance purchase on an existing inventoried item and you will be using a repair and maintenance (Non-Equipment) Account code in the C-FOAPAL.
- You may determine whether to use an Equipment Account code based on the purchase price of the item after any discount or sale price. Example if the item is originally $3,000 and the vendor discounts it to $2,100, do not use an Equipment Account code starting with 127XXX or 163XXX within the C-FOAPAL. Any trade-in amount discount should be considered in the overall cost of the item when deciding whether to use a 127XXX or 163XXX account code.
- It is recommended to apply an Equipment Account code (equipment over $2,500) starting with 127XXX or 163XXX in the Accounting Code (C-FOAPAL) at the line level to items which require a PTag. Do not apply an additional Accounting Code (C-FOAPAL) split to that line level. If the item does need to be charged to multiple Accounting Codes (C-FOAPAL), Property Accounting can assist with adjustments or questions related to these types of adjustments once the purchase appears in FABweb.
- Guidance on Furniture Orders
  - Furniture orders are a unique situation. There are sometimes supplemental fees and additions within the order that may need to be added to pieces of furniture for inventory. Any additional fees required to get the item to campus and in use an Equipment Account code starting with 127XXX or 163XXX within the C-FOAPAL. The purchaser can create lines for the specific furniture at vendor quoted value and note the

amount of PTAGS that will be needed for anything over $2500. The Unit Rep will need to work with UPAR to fine-tune the final tags needed for inventory. There will be invoice processing issues if the vendor submits a lump sum invoice against an itemized PO.

- Actions taken in FABweb as well as with Biennial Inventory are separate from generating orders in iBuy. Please continue to complete those processes accordingly. PTAG numbers are not assigned at the time you answer the iBuy question.
- Additional information can be found at [Equipment Management](#).

Small Purchase Question on the Purchase Requisition Form and the Standing Order Form

If you accidently answer No to 'Is your order $10,000 or more?' and the requisition total is $10,000 or over, the requisition will still route to your campus Purchasing department for their review based on the requisition total. The information requested in the additional questions prompted when answering No will be missing. Purchasing may return the requisition to you to correct.

Using Attachments

It is recommended to obtain a quote from the vendor and add it to the order in PDF format as an External Attachment. The quote will assist you with populating the Order Details.

Internal Attachments stay within iBuy and general support documentation regarding the order for the department and possibly Purchasing.

External Attachments accompany the PO to the vendor to support the content of the PO they are being sent. If an attachment is added as an External it does not need to be added as an Internal as it is visible within iBuy for review.

FOB Code (Freight/Shipping)

New required field on the cart in the Shipping section.
The FOB Code options are:
- A) Freight/Shipping charges should not be invoiced by the Suppler. FOB 31
- B) Freight/Shipping charges are to be invoiced by the Suppler and allowed. FOB 30
  - Use this option when you received shipping information on your quote from the vendor or know that the vendor will be charging freight/shipping on the invoice.
- C) Special Shipping instructions (include Ext Notes & applicable documentation/PO Clause) FOB 21
  - Use this option to accommodate for departmental FEDEx or UPS Shipping accounts.
  - *CORRECTION 1/8/2024*: If the order involves live animal delivery or arranging for hazardous materials to be delivered, select the appropriate FOB option (FOB 31 or FOB 30) based on the shipping/freight charge information provided by the vendor on the quote.

If the quote you receive from the vendor does include shipping/freight charges and the vendor has confirmed they will be itemizing it on the invoice for the same quoted amount, it is not necessary but that information could be added as a separate line with Commodity Code selection of '88081 Shipping & Handling Fees', the FOB Code selection should be 'B) Freight/Shipping charges are to be invoiced by the Suppler and allowed. FOB 30' and the quote should be added in PDF format as an External Attachment. If the vendor submits an invoice with a different shipping/freight amount than what was entered on the PO, University Payables will notify you.

Recommended FOB Code selections for catalog generated orders. *Note these are subject to change.*

Catalog Vendor	Recommended FOB Code selection
America To Go	A) Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Amtex Suppliers/Consolidated Hospitality	B) Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Bienali	B) Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
CDW-G	A) Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
CV LLoyde	B) Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Dell	B) Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30

Fisher Scientific	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
HP Inc.	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Henry Schein	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Hewlett Packard Enterprise Co.	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Home Depot Pro	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Industrial & Utility Supply Ltd	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Linde	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Neta Scientific	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
ODP Business Solutions	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Pace Systems	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Pier Group	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Sigma Aldrich	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
Thomas Scientific	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30
VWR	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
Volunteer Supply Industries	A)	Freight/Shipping charges should not be invoiced by the Supplier. FOB 31
WW Grainger	B)	Freight/Shipping charges are to be invoiced by the Supplier and allowed. FOB 30

Pre-payment or Deposits

Units will still need to have a pre-payment or deposit line on the order and submit a Purchase Order Special Payment Request.

Please see the Completing the PO Special Payment Request Form job aid under Invoice at iBuy Training Materials.

Changing Payment Term option in the Billing section
- The acceptable non-standard options in iBuy are:
  - 1% 10 Days Net 30
  - 2% 10 Days Net 30
  - 2% 15 Days Net 30
  - Net
  - Pre-Paid (Internal Notes Required)
- Please see the Requesting Non-Standard Payment Terms in iBuy job aid under Requisition Creation at iBuy Training Materials.

Commodity code and Account code Selection
- iBuy does provide a search within both the Commodity code field within the Purchase Requisition Form and the Standing Order Form and the Account code field within the Accounting Codes entry section.
- On the OBFS page you will find the Account Code Search, Equipment Account Code information and a Commodity Code Helpful Document to better assist you with determining the best Account Code or Commodity Code to use.
- Additional information can be found at University Accounting & Financial Reporting and Equipment Management.

Splitting Accounting Codes and $0.01 line items
- Accounting Codes (C-FOAPAL) may be split at the requisition header level or line level on a multi-line requisition. Note that
- Splits are to be done by % of Price or % of Quantity. If you want a specific dollar amount charged to an Accounting Code, you will need to determine what percentage of the total equals that dollar amount.
- An Asset Account code (equipment over $2,500) that starts with 127XXX or 163XXX must be applied in the Accounting Code (C-FOAPAL) at the line level for the item that requires a P-tag and the non-Asset Account code Accounting Code (C-FOAPAL) applied at the header level. Do not apply an additional Accounting Codes (C-FOAPAL) split on the line level that has an Accounting Code (C-FOAPAL) that uses an Asset Account code starting with 127XXX or 163XXX applied.

- If your order that requires an Accounting Code (C-FOAPAL) split contains a $0.01 line item, you must apply a line level Accounting Code (C-FOAPAL) for that $0.01 line then enter the Accounting Code (C-FOAPAL) split at header level using % of Price or the order will fail in Banner although it shows complete in iBuy.
- See the Splitting Accounting Codes job aid as well as Using Equipment and Non-Equipment Account Codes on the same Requisition job aid under Requisition Creation at iBuy Training Materials.

Vendors that currently invoice in iBuy
- There are 22 catalog vendors who primarily invoice in iBuy and there are currently 247 vendors that enrolled to submit their invoice directly into iBuy if they choose to do so.
- Invoice Enrolled Vendors are indicated with a blue envelope with Search for a Supplier results.
  Example:

Diverse Vendors in iBuy
Diverse Vendors are indicated with a small green D within Search for a Supplier.
Example:

Catering and Restaurant vendors for meetings or events
- Please work with your Purchasing Office to determine the best course of action for orders with catering vendors for business meetings or off-site restaurants for events.

Change Requests
Please work with your campus Purchasing department if there are questions about if/when a Change Request should be submitted on a completed PO.

If you are from UIC/Chart2, UIS/Chart 4 or System/Chart 9, please the PO Change Request form under University Forms in iBuy. The form will route to your campus Purchasing department for processing.

If you are from UIUC/Chart 1, please use the Service Request Form to process Change Requests.

A PO Change Request can be submitted for the following changes:
- Dollar amount
- Quantity
- Commodity Code
- Add a new line item
- Cancel an existing line item
- Ship To address

- Product description
- FOB Code
- Non-Standard Payment Terms
- External Notes or attachments

A PO Change Request cannot be processed in iBuy in the following situations:
- If the Purchase Order is from a previous Fiscal Year AND is closed in Banner.
- If the Purchase Order was generated through a Hosted or Punchout catalog.
- If the Purchase Order has been fully invoiced. This may need to be checked in Banner if the vendor does not invoice in iBuy to date.
- If the vendor name needs to be changed to another vendor.
- If a different BP address needs to be used for the same vendor or if the original BP address used on the PO is not inactive.
- If a Change Request was completed on a PO to 'cancel a line'/Delete a line and the user needs a second Change Request for another reason, currently the second CR will not import into Banner. 10/2023 ticket is with Ellucian from the S2P project.

If multiple Purchase Orders need to have changes applied, submit one PO Change Request Form per Purchase Order.