

Suggested Best Practices for Equipment Procurement

Tagging New Equipment

	Suggestion
1.	Document the desired physical tagging of equipment up front in procurement systems to avoid scrambling for information after payment and OTag record creation (see items 2-4 below).
2.	Centralize the requisition process in your unit business office for an efficient and effective process and to avoid errors and better share information with all involved.
3.	Use comments in iBuy and Pcard to document desired tagging information (1 tag for lines 1-4, 1 tag for 5-6, etc...including a description and dollar amount per equipment tag needed).
4.	Document desired tagging information in the body of the Banner purchase request and PO (1 tag for lines 1-4, 1 tag for 5-6, etc...including a description and dollar amount per equipment tag needed).

iBuy

	Suggestion
1.	For iBuy non-catalog items and forms – create the requisition with 1 requisition line for each piece of equipment (and attach quote if more detailed).
2.	For iBuy computers (Dell, HP, CDW-G) – use the standard customizable bundle options so that requisitions are 1 line for the bundle (CPU, monitor, memory, power supply, etc... combined).
3.	For iBuy orders – tagged equipment and other non-inventory items can be included on the same order, but units need to apply account codes (CFOAPALs) at the line level (not the header level) to appropriately account code each line item on the order.

Tagging Standard Equipment

	Suggestion
1.	Units should be proactively working their FABweb inbox of new acquisitions and submitting items timely (within 30 days from payment and OTag creation as required by Illinois State regulations).
2.	Units should promptly reply and respond to inquiries from their University Property Accounting and Reporting contact regarding tagging information.
3.	When using multiple POs and/or vendors to buy/build equipment from parts and pieces – review for use of fabrication process and fabrication account codes (128*) to avoid unwanted OTag asset record creation.
4.	Share understanding of Banner equipment process flow with all involved in the process in your unit including the need for proper account coding (127* or 163* account code ranges).
5.	For any equipment JV adjustments, please use the JV document text to identify the original OTag(s) and source document(s) and explain desired tagging.

Questions? Contact:

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<http://www.obfs.uillinois.edu/equipment-management/>