

A collage of four images: a green lawn with trees, a modern building with a glass facade, a classical building with columns, and a statue of a man in a suit.

UNIVERSITY OF ILLINOIS

AT URBANA-CHAMPAIGN



2015 BUSINESS LEADERSHIP CONFERENCE

iBuy Tips & Tricks

Jeannine Reese

Tyler Tanaka

OBFS Administrative Services

A Shared Vision

- Jeannine Reese
 - OBFS Administrative Services
 - BIS Production Support - iBuy Production Support Team
 - jmreese@uillinois.edu or 217-265-0400

- Tyler Tanaka
 - OBFS Administrative Services
 - Training, Performance Development, Communications and Policy
 - ttana2@uillinois.edu or 217-300-1936

Learning Objectives

At the end of this presentation, the attendee will be able to:

- Identify solutions and apply troubleshooting tips to the top iBuy FAQs
- Find and complete the Service Request Form
- Locate the iBuy website and training

Topics

- Website review
- Common Service Desk Topics and FAQs
- Upcoming Changes
- Training Opportunities
- Support
- Questions/Comments

Website Review

- Recently updated pages
- iBuy roles and requisition workflow
- OBFS BIS Production Support Service Request Form

- About OBFS
- Who To Ask
- Forms
- News Center
- Training Center
- Jobs
- Site Map

Share:    

Accounting & Financial Reporting

Reports, Banner Account Codes, UFAS to Banner Crosswalks, Year-End Procedures, FCIAA, Reference Materials

Audit/Internal Controls

Employee & Supervisor Responsibility, Internal & External Audits

Budgeting

Budget Development Tips, Adjustment Requests, Budget Memo Log, Chicago Campus, Springfield Campus, Urbana-Champaign Campus

Business Travel

Advances, Contracted Travel Agency, Reimbursement Rates, Foreign Travel, Travel Resources, TEM Resource Page

Capital Programs & Real Estate Services

Applications [↗](#), Faculty and Staff [↗](#), Landlord Submittals [↗](#), University Leasing Process [↗](#), Training [↗](#)

Card Services

Department Card Managers (DCM), Purchasing Card (P-Card), Travel Card (T-Card)

Cash Handling

Chicago Campus, Springfield Campus, Urbana Campus

Contract

Business Development Services - UIC: Contract Types, OBDS Contract Process, HOT Topics, Contract Status, Newsletters, Illinois Contract System (ICS) Resource Page

Contracts Services Office - UIUC: Contract Types, Contract Review Process, Contract Elements, Contract Training, Illinois Contract System (ICS) Resource Page

Contracts Services Office - UIS

Government Costing

OMB Uniform Guidance, Rate Schedules (F&A, Fringe Benefits, Tuition), Facilities & Administrative, Tuition Remission, Fringe Benefit Rates, Service Activities, CASB Disclosure Statements, Higher Education Research and Development (HERD) Survey, Costing at a National Level, Historical Summary Reports

Grants & Sponsored Projects

OMB Uniform Guidance, Effort Reporting, Rate Schedules (F&A, Fringe Benefits, Tuition), Banner Index Codes, Month-End Reporting, Audit Reports, Expenditure Reports, Essentials of Post-Award Administration, Links & Resources

iBuy (online purchasing)

What's New, Overview, Get Started, Reporting, Training Resources, About the Project

Payments

Payments to Vendors, Payments to Students, Payments to Non-Employees (Honorarium), Employee Reimbursements, TEM Resource Page, Payables Processing Status

Payments to Foreign Nationals

University Payroll Services, [i](#) Payment Eligibility Grid, [i](#) Payments to Employees, [i](#) Payments to Non-Employees, [i](#) Travel and Expense Reimbursements, [i](#) Other Payments, Tax Status Review Appointments [↗](#)

Payroll & Benefits

Customer Service, Adjustment Notification Application (ANA), Payroll Transaction Processing, Earnings Statements, Payroll Schedules, Payroll Distribution, Payroll Deductions, Tax Information, Tuition & Fee Waivers, Payroll Calculators, Address Change, Reports, Benefits Information, Newsletters, Links & Resources

Policies & Procedures Manual

Log in to:

Choose the application

OBFS Initiatives

- [Transparency Commitment](#)

Resources:

- [Banner Alerts & Resources](#)
- [Benefits Information](#)
- [Calendars, OBFS](#)
- [Conferences](#)
- [Human Resources](#) [↗](#)
- [i-card](#) [↗](#)
- [Identity Theft \(Red Flags Rule\)](#)
- [Office of Treasury Operations](#) [↗](#)
- [Orientation for New Business and Finance Employees](#)
- [OBFS Policies & Procedures Manual](#)
- [U of I Phonebook](#) [↗](#)
- [Web Sites & Applications](#)

Information for:

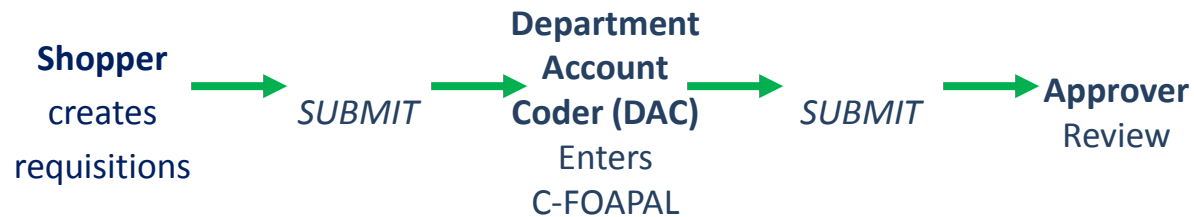
- [Business Managers](#)
- [i OBFS Employees Intranet](#) [↗](#)
- [Students](#)
- [Vendors](#)

Current Announcements

- [Save Money and Reduce Your Carbon Footprint -- Take Amtrak When Traveling Between Campuses!](#)
In an effort to save money and reduce greenhouse gas emissions, the Office ...
- [Consolidation of Equipment Account Codes](#)
Several current equipment codes are being consolidated to simplify

Requisition Workflow

- Shopper**



- Requestor**



Action within workflow

- If the requisition is approved, PO number is assigned and document sent to vendor.
- If the requisition is returned, the order will return to the Draft Cart of the individual who created the requisition. The issue can be corrected and the order resubmitted.
- If the requisition is rejected, the order is no longer valid.


iBuy roles and their general requisition actions

Roles	Create a cart	Submit a cart	Add/Edit C-FOAP	Approve or Reject
Shopper	Yes	Yes	No	No
Requestor	Yes	Yes	Yes	No
Department Account Coder	No	No	Yes	Yes
Approver	No	No	Yes	Yes
Executive Approver	No	No	No	Yes
Query Only	Yes	No	No	No

OBFS BIS Production Support Service Request Form

OBFS BIS Production Support Service Request | University Administration

OBFS BIS Production Support Service Request



OBFS BIS Production Support Service Request / New Form

Please complete the questions below specific to the issue you are currently experiencing. A member of OBFS BIS Production Support will contact you.

NetID*

First Name*

Last Name*

Campus*

Chicago
 Springfield
 Urbana
 UA

Phone Number*

Choose the Application*

ANA

Banner Feeders

ColdFusion

Confirmations and Commitments

CostShare

FABWeb

FCIAA

GC70

GCash

iBuy

ICS

Intellecheck

Procurement Bulletin

RightFax

SharePoint

SitePublish

Year End Fact Sheet

Other (please specify)

OBFS BIS Production Support Service Request Form - 05-15_151452

Please read the [Web Privacy Notice](#) for this form. This form is developed by the University of Illinois.
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iBuy Area of Concern

[OBFS BIS Production Support Service Request](#) | [University Administration](#)

OBFS BIS Production Support Service Request

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 [OBFS BIS Production Support Service Request](#) / iBuy - submitted: 2/23/2015 4:38:27 PM

Area of Concern*

- My iBuy Profile (Roles, Ship To Addresses, Email Approval Code)
- Requisition Process (Creation, Approvals, Returned/Rejected, Status)
- Purchase Order Process (Rejected, Delivery Status)
- Hosted and Punchout Catalogs (Unable to access, price discrepancy)
- Invoices or Payments to Vendors
- Purchase Order adjustments such as Closing or Canceling a PO and Change Orders
- Other (please specify)

Save

Area of Concern: Requisition Process

[OBFS BIS Production Support Service Request](#) | [University Administration](#)

OBFS BIS Production Support Service Request

UNIVERSITY OF ILLINOIS
URBANA-CHAMPAIGN • CHICAGO • SPRINGFIELD

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- Other (please specify)

Document Number (Requisition Number or Purchase Order Number)*

If the Document Number is unknown, use N/A to complete the required field.

Brief Description of Issue or Question*

If question is regarding a Requisition Return/Reject or a Purchase Order Reject, please cut and paste the entire email notification received below or you may attach the email

Attach email notification received regarding a Requisition Return/Reject or a Purchase Order Reject.

Browse...

Save

Most Common Service Desk Questions and FAQ

- Ship To Address
- One Requisition – Multiple Purchase Orders
- Order Status
- Returned/Rejected Requisitions
- Issues with punchout vendors
- Updating or correcting vendor details

Ship To Address

- **How to do I stop the address error?**
 - Under the View My Profile~Default User Settings~Default Address, select the default address option from the list of Shipping Addresses. Make sure that the Location: field is populated. The information can be a specific room number or email address. Click Save.

- **I need to change my default Ship To Address.**
 - Under the View My Profile~Default User Settings~Default Address, use the Select Addresses for Profile option to view address options linked to your Chart/Org. Select the address that suites your needs. Click Default.
 - If the correct address is not listed, complete and submit a Banner Ship To Address Add Form found at <https://www.obfs.uillinois.edu/forms/purchases/>.

- **My department has moved and our Ship To Address needs updated.**
 - Complete and submit a Banner Ship To Address Add Form found at <https://www.obfs.uillinois.edu/forms/purchases/>.
 - A confirmation email will be sent from iBuy Production Support once the address is ready for use in iBuy.

- **How do I use the various Ship To Addresses I have added?**
 - Once you Proceed to Checkout on a requisition, select the Edit button under the Shipping section. This will display the options you have selected for your profile to choose from that will be applied to the requisition.

One Requisition - Multiple Purchase Orders

- One requisition can create multiple Purchase Orders when:
 - delivery location is altered at line item level
 - a non-catalog item/form is added to a punchout cart from the same vendor
 - Multiple vendors are selected when creating a requisition

One Vendor-One Requisition-One PO

- Purchasing strongly advises departments NOT enter multiple vendors on one Requisition.
- Use the One-to-One-to-One method.
1 vendor on 1 requisition creates 1 PO

Order Status

The current status of Requisition can be found on the Req Approval Tab

The screenshot displays the 'Req Approvals' tab in a requisition system. The workflow consists of the following steps:

- Submitted Future**: Indicated by a red arrow icon.
- Budget Auth Future**: A box with the text 'Future' and a right-pointing arrow.
- Departmental Approval Future**: A box with the text 'Future' and a right-pointing arrow, and a link 'view approvers' below it.
- Create PO Future**: A box with the text 'Future' and a right-pointing arrow.
- Finish**: Represented by a checkered flag icon.

A modal window titled 'Workflow Step Approvers (Departmental Approval)' is open, showing the following list of approvers:

Approver Group : 1-251 between 0.01 and 4999.99		
Autumn Goodrum	agoodrum@illinois.edu	+1 (217) 333-9096
Brandy Meid	meid@illinois.edu	+1 (217) 333-9645
Catherine Somers	csomers@illinois.edu	+1 (217) 244-1783
Steven Daley	scd@illinois.edu	+1 (217) 333-9675
Suzanne Lowry	slowry@illinois.edu	+1 (217) 333-1012

The modal window also includes a 'Close' button at the bottom.

The current status of Requisition can also be found on the History Tab

Requisition | Req Approvals | PO Preview | Comments | Attachments | **History**

Click to filter history ? Export CSV

Results Per Page 20 Records found: 12 Page 1 of 1

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	2/25/2015 2:41 PM	System	Budget Auth	Requisition approved				
	2/25/2015 2:41 PM	Suzanne Lowry		Requisition submitted				

Requisition | Req Approvals | Comments | Attachments | **History**

Click to filter history ? Export CSV

Results Per Page 20 Records found: 37 Page 1 of 2

Line No	Date/Time	User	Step(s)	Action	Field Name	From	To	Note
	2/25/2015 2:49 PM	System		Requisition approval process completed				
	2/25/2015 2:49 PM	System	Create PO	PO Created	PO#: 45609214			
	2/25/2015 2:49 PM	Eleanor Kilmer	Departmental Approval	Requisition approved (via email)				

Rejected and Returned Requisitions

Rejected Requisitions

- Rejected requisitions are null. No further action needed.
- Reasons for rejected requisition include Approver decision, Mixing asset and non-asset **A**ccounts, Failed cross-FOAPAL (not all the segments of the FOAPAL can be used together), invalid C-FOAP splits, or invalid Vendor BP details
- iBuy Production Support runs a daily report on rejected requisitions and will contact the individual with resolution information.

Returned Requisitions

- Returned requisitions go to the user's draft cart and may be corrected then resubmitted.
- Common reasons for a returned requisitions include Approver decision, Requestor/Shopper request, incomplete C-FOAP, incorrectly entered C-FOAP split, invalid code segment, Mixed funds between State and non-state Funds, Shopper role set-up not completed, dollar total over 10 million, or zero dollar line items.

Issues with Punchout Vendors

When experiencing problems with punchout vendors, there are a few troubleshooting tricks you can try:

- Shipping Address default is the established Banner Ship To code
- Use Internet Explorer as your web browser
- Delete Cookies
- Enable 3rd Party Cookies

Vendor details

To ensure that the most accurate and current information is listed in Banner and iBuy for a vendor, please request an updated Vendor Information Form to be submitted.

15.1 iBuy Release

- If you use Favorites, the management feature will now display with an Available Actions drop-down menu. This is similar to the Available Actions drop-down menu seen in Draft Carts.
- The ability to search Favorites and Favorite folders.

iBuy Training Opportunities

iBuy Support

<https://www.obfs.uillinois.edu/iBuy/who-to-ask/>

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Office of Business and Financial Services

- OBFS and UOCPRES Websites
- OBFS Policy Manual

iBuy (online purchasing)

[OBFS Home](#) » [iBuy \(online purchasing\)](#) » [Who To Ask](#)

- [iBuy \(online purchasing\)](#)
- [What's NEW](#)
- [Overview](#)
- [Get Started](#)
- [Reporting](#)
- [About the Project](#)
- [Job Aids & Training Materials](#)
- [FAQs](#)
- [Who To Ask](#)

[Give us your feedback](#)

Related Links:

- [Purchases](#)
- [Procedures & Rules](#)
- [Other Ordering & Payment Methods](#)
 - [Banner Orders](#)
 - [Cash Purchases](#)
- [Reports](#)

Share:

iBuy (online purchasing) Who To Ask

General iBuy Users:

Please use the [OBFS BIS Production Support Service Request Form](#) to contact the iBuy Production Support Team with any issues, questions or concerns you may have when using iBuy.

To use the form, select iBuy from the list of applications after entering the required contact information. Upon submission of this form BIS Production will be notified via Service Desk Manager and a service request ticket will be created on your behalf. The iBuy Production Support Team will manage your request from there.

Chicago Campus:

Please contact the UIC iBuy Help Team by using the UIC [iBuy Help Desk Form](#) or calling 312-996-2979 (UIC).

UIC iBuy Help Desk Hours:

- Monday - Thursday 1:00pm - 5:00pm
- Friday 12:30pm - 4:30pm

If you received our voicemail, please leave a message clearly stating your name, email and phone number along with a brief explanation regarding the nature of your call. A detailed message will help expedite a resolution.

You may also visit the [iBuy@YourService Intranet](#) site for help and additional information regarding iBuy.

Technical Issues:

You may contact the AITS Service Desk by phone at:

- Urbana-Champaign campus, Springfield campus, University Administration and University Satellite locations
 - 217-333-3102
- Chicago campus
 - 312-996-4806

Last Updated: November 11, 2014

Questions?