Open your my.portal Purchasing App – https://my.library.illinois.edu/purchasing/

Updated 3/22/2024

My Purchases screen: List of current orders you have placed and their current statues.

To submit a reimbursement request, click the 'Create New Order' button.

My Purcha	ses Pick Up Queue(s)							
Create	low Order				Stat	us Key	Description	
Cleatern	lew older					Status	Description	
Order Number	Request Routed	Vendor	Total Amount	Date Requested	Status (Section)	Tracking #'(s)	Action	
Pending	Materials Research Lab	Adorama Education and Public Sector	\$13.50	7/17/2012 10:48:27 AM	Approved		[View] [Cancel Order]	
Pending	Materials Research Lab			7/16/2012 9:28:59 PM	Approved		[View] [Cancel Order]	
1744	Materials Research Lab			7/16/2012 9:28:08 PM	Processed		[View]	
Pending	Physics	Bangs Laboratories Inc			Initiated (Personal Information))	[Continue] [Delete]	

New Orders Step through Purchasing Wizard – completed either by student, Faculty or Staff

Personal Information section:

You will see your name in the drop down list in addition to users that have set you up as a Proxy.

Purchasing - Order	
1 Personal Information 2 Accou	nt Information $ angle$ 3 Vendor Information $ angle$ 4 Items $ angle$ 5 Delivery Information $ angle$ 6 Review & Submit $ angle$ 7 Request Completed $ angle$
Requestor Name	Parks, Gregory W 👻
Phone	(217)351-2080
Principal Invesigator (netID)	kbwillia
Continue	

Account Information section:

Requestors have the ability to pick from your accounts assigned into you in Chart of Accounts. Otherwise please enter an account number you have been instructed to use for the purchase. When entered click ADD so that it loads. You may add multiple CFOPs if you plan to split the expense.

Purchasi	ing - Order				1000	11111		0.000			0.995
1 Perso	nal informatio	an 2 Account	Information	3 Vendor Inf	formation 4 Ite	ms 5 Delivery I	nformatio	n 6 Revi	w & Submit	7 Request Com	pleted)
View My	Accounts or	manually enter a	n account bel	ow:							
Chart	Fund	Organization	Account	Program	Activity	Split	Valid	Action			
								Add			
1	611706	540000		191300			Yes	×			
	,	The account Please choose whi	: number prov ich unit's busi	ided is from a un ness office shoul	nit that is not using d receive your req	the system! uest for processing					
I Any Fab	ricated										
Equipme	int										
Tes	NO										
Continu	e										

After the C-FOP is added, a yellow box will appear below. Choose from the drop-down box in yellow, based on the first three digits of the Organization code:

- 396 Mortenson
- 540 Library Administration
- 600 Library Research & Publication
- 668 Library
- 795 Library Collections/Support

Click CONTINUE

Vendor section:

Choose "Add a New Vendor" and enter your Name under the Vendor field

Purchasing - Order						
1 Personal Information $ ight angle$	2 Account Information	3 Vendor Information	A Items	5 Delivery Information	6 Review & Submit	angle 7 Request Completed $ angle$
Available Vendor Lists	Vendors					
Used on Previous Order	vendor					
 Departmental List Add a New Vendor 	Address					
	City	State	Zip			
	Country	Phone	Fax			
	Uri					
Continue						

Click CONTINUE

Items section:

Enter the items you would like to have reimbursed.

- In the "Catalog" field, i.e. "lodging, " "airfare," "car rental," ect.
- The units will be each.
- For Quantity enter 1, unless it's for per diem or mileage
- In the description field, give a description of the travel
- For Price enter the total amount of the receipt you will be uploading
- Click Add
- Repeat for other items. If Per Diem or Mileage, see below

For Per Diem

• Complete and upload Per Deim Request form** located: <u>https://www.library.illinois.edu/staff/bhrsc-business-services/</u>

**Meals that are provided to you during the course of your travel by the conference, event, host, or hotel must be deducted from the per diem. Breakfast included in your nightly rate at the hotel must be deducted. Please indicate below the meal(s) by date that were provided for you for proper record keeping.

- Enter "Per Diem" enter the Catalog field
- The units will be each.
- For Quantity enter the number of days you were gone
- Description: Enter "See Attached form"

- Enter \$59 in the Price field (Chrome River will calculate the amount based on departure date and time, return date and time and destination)
 - If you travel internationally and are seeking per diem, go to the US Department of State website (<u>https://aoprals.state.gov/web920/per_diem.asp</u>) for the City and Country visited. Enter the amount from the M & IE Rate column in the Price field.
- Click Add

For Mileage

- Enter "Mileage" enter the Catalog field
- The units will be each.
- For Quantity enter the number of miles
- In Description, list the both the departure address and the address that was travel to.
- Enter \$0.655 in the Price field for travel per to 12/31/23. For travel after 1/1/24, enter \$0.67(Chrome River will calculate the amount based on departure address and the address that was travel to.)
- Click Add

If you have more than one item, after clicking ADD enter information for next item; then click ADD again.

***Please note foreign currencies, make a note in the description field the currency of the receipts. ***

*****If conference hotel was used, please upload proof of conference hotel as an attachment. *****

Purchasing - Order							
1 Personal Information	2 Account Information	3 Vendor Informati	on 4 lt	ems 5 Deli	very Informat	ion 6 Rev	iew & Sul
							Action
Catalog/Part#		Units each		Quantity	Price		Add
Description		N) Delivery E	xpected			
Item URL							
Catalog/Part #	Description	Units	Quantity	Unit Price	Ext Price	Delivery	
Hotel		each	1	\$1,000.00	\$1,000.00	Yes	Edit X
airfare		each	1	\$566.00	\$566.00	Yes	Edit X
Totals			2		\$1,566.00		

Items section: Upload

Upload all your receipts and approvals individually as Reference Material. This will allow the Business Office to review the documents easily.

Purchasing - Order	
1 Personal Information 2 Account Information 3 Vendor Information 4 Items 5 Delivery Information	ation 6 Review & Subm
Documents Uploads	
File Name File Type	Action
Type: Reference Material Browse No file selected. Upload	
Continue Items	

Delivery Information Screen:

For Reimbursements requests, click the box next to "Other Address" and use your university address.

In order to continue to the next screen a Delivery Date Requested will need to be entered. Please use today's date.

Purchasing - Order			· · · · · ·		
1 Personal Information	2 Account Information	3 Vendor Information	4 <u>Items</u>	5 Delivery Information	6 Review & Submit
Delivery Information					
Ship To		V Other (Off Comr	ue Addroce)		
	A states a su		Jus Address)		
	Address:			1	
			11,		
Delivery Date Requested					
Denvery Date Requested					
Shipping Type	1-5 Business D	ays 🗸			
Comments/Special Instru	ictions				
				/	
				///.	
Pickup Proxies	Enter one or mor	e NetIDs			
Continue					

Click CONTINUE when done

Review Screen:

Review and Submit Request. If the amount is under the department threshold it will go to the business office to place the order. Otherwise, it will go to the PI/Owner of the account entered for approval.

***If the Business Purpose box does not appear, please click "Revisit" in the Comments/Special Instructions area and enter a Business Purpose in the "Comments/Special Instructions" section.

Purchasing - Or	der										
1 Personal Inf	formation	2 Account Information	3 Vendor Information	4 Items	5 Delive	ery Informatio	on 6 Rev	view & Su	ıbmit	7 Request C	Completed \rangle
		Your order v	vill be routed to the Materials	Researct	n Lab Bus	iness Office.					Change
Your Informatio	n		Revisit	Delive	rv Informa	ation					Revisit
Gregory W Park (217)351-2080 PI: Kristopher B	s Williams			MRL S 104 S Room Urban Date R Shippi	hipping a . Goodwir 190N a, IL6180 Requested ng Type: 1	nd Receiving Ave 1 1: 1:7/21/2012 1-5 Business	Days				
Vendor Informa Adorama Educa 42 West 18th St New York, NY 10	tion ation and Pub treet 0011	lic Sector	Revisit	Comm	ients/Spe	cial Instruction	ons				Revisit
Items											Revisit
Catalog/Part #		Description	Units	Qua	antity		Unit Price		E	kt Price	
R34345		Paper	ea	2			\$5.25		\$1	10.50	
#2		Pencil	ea	12			\$0.25		\$3	3.00	
Documents Uni	oade		Povicit	Accou	int Inform	ation					Povicit
Type	ouus	File	TXEWISIT	Chart	Fund	Organization	Account	Program	Activity	Split Type	Value
Price Quote	Untitled-1.p	ng		1	200250	22	Unknown	22			
Project Descrip	ntion					Please	e describe t	he purpos	se for buy	ving the good	1 or service
Submit Orde	r										

Request Completed Screen:

Done! Message will show letting user know where the order went - Business Office or Account Owner/User for approval.

Purchasing - Order							
1 Personal Information	2 Account Information	3 Vendor Information	4 Items	5 Delivery Information	6 Review & Submit	7 Request Completed	
Thank you for your order! Your order has been sent to notice on the status of your	o the Materials Research La order by email.	ab Business Office. Once	your order h	as been placed, you receive	9 a		

Users can view the status of an order and see the current status. In addition, the Requester will receive an email when each status is competed.

rick op QL												
Order Status Tra	acker											
		Reque	est		Purc	hase				Delive	ery	
	Requested	ed	Approved	Proces	sed	Pu	urchased		Received		Picke	d-Up
Status	Completed	ed	Completed	Pendi	ng							
Date	7/17/2012	12	7/17/2012									
Time	10:48:27 A	AM	10:48:27 AM	1								
Name	Parks, Grego	ory W	Auto Approve	d								
(217)351-2080 PI: Kristopher B	Williams				MRL S 104 S Room Urbana Date R Shippi	hipping ai Goodwin 190N a, IL61801 equested ig Type: 1	nd Receiving Ave : 7/21/2012 -5 Business	Days				
(217)351-2080 PI: Kristopher B Vendor Informat Adorama Educa 42 West 18th St New York, NY 10 Items	Williams tion tion and Public Sec reet 1011	ector			MRL S 104 S Room Urbana Date R Shippin	hipping an Goodwin 190N 1, IL61801 equested 1g Type: 1 ents/Spec	nd Receiving Ave : 7/21/2012 -5 Business cial Instructio	Days ons				
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(217)351-2080 PI: Kristopher B Vendor Informat Adorama Educa 42 West 18th St New York, NY 10 Items Catalog/Part # R34345 #2	Williams tion tion and Public Ser reet 011 Pa Pa Pe	ector escription 'aper encil		Units ea ea	MRL S 104 S Room Urban; Date R Shippi Comm Qua 2 12	hipping ai Goodwin 190N a, IL61801 equested ig Type: 1 ents/Spee	nd Receiving Ave : 7/21/2012 -5 Business cial Instructio	Days ons Unit Price \$5.25 \$0.25		E \$ \$	ixt Price 10.50 3.00	
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