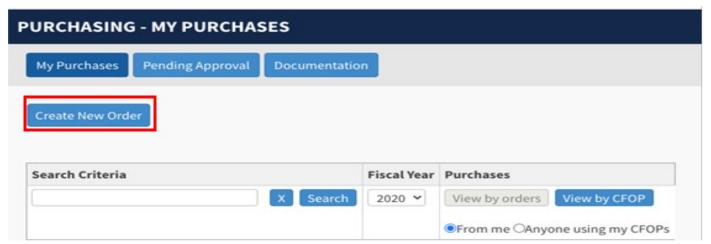**HOW TO USE THE ECE PURCHASING APP – Creating a new Purchase request**

STEP ONE: Logging In

- Go to http://my.ece.illinois.edu

- Click on the word "Finance" in the upper right-hand corner (see above picture). This will provide a pull-down of options. Click the "Purchasing" option.
- If you are not already logged in, you will need to do so now. Use your NetID and password to log in.
  - You may need to have access to the U of I network in order to do this.

- Once you have logged in, your page will look similar that what is shown above. Press the button that says "Create Order" (See picture above)
  - Your view screen may look a little different but there will still be a "Create Order" button towards the top of the screen.

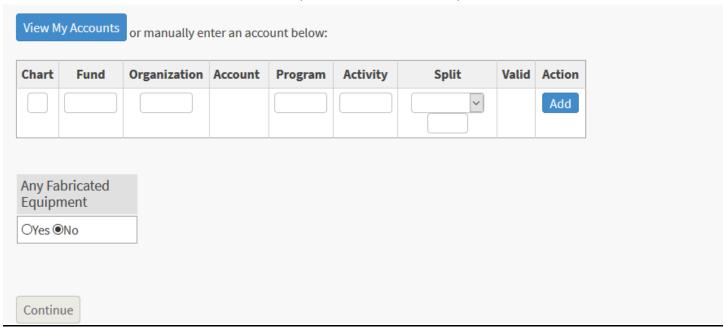# STEP TWO: Personal Information

The next screen that appears will look like the one pictured above.

- In the "Requestor Name" box, put your NetID or click on your NetID from the drop box.
- In the "Phone" box, put a phone number that we can reach you at.

NOTE: This phone number will NEVER be given to any outside vendor. It will only be used by the business office to contact you with regards to your purchase request in the event that email is not quick enough.

- Press the "Continue" button

STEP THREE: Account Information (CFOP Information)

Your next screen should be similar to the one pictured above. The first box is where you will put the CFOP information that will tell the business office what account(s) to charge your purchase to. There are two different options to insert a CFOP.

Students: CFOP information will be given to you by your professors or instructors.

- **Option 1**: You may manually enter the CFOP information by typing it in to the boxes. Most CFOPs will be given to you in this form: ######-######-######
  - Chart: This will ALWAYS be a 1 as long as you are at the U of I in Champaign-Urbana.
  - Fund: This is the first set of numbers
  - Organization: This is the second set of numbers
  - Account: This should remain blank unless the items being purchased are Fabricated Equipment (see **"Fabricated Equipment"** below)
  - Program: This is the third set of numbers
  - Activity: Only a few CFOPs will have this. Most of the time it will remain blank.
  - Split: Leave this blank unless you need to add multiple CFOPS (see instructions on how to do this in the below section "**Using Multiple CFOPs**"
  - Valid: If the CFOP you entered is Valid, this column will say "Yes"
  - Click "Add" in the Action Column. If you need to enter another CFOP, see the **Using Multiple CFOPs** section below. If your purchase contains Fabricated Equipment, see the **Fabricated Equipment** section below. Otherwise, press the "Continue" Button.

- **Option 2**: If you have used this app before, you may be able to use accounts that you have used before.
  Note: Not all previously used accounts may appear here.
    - Click the "View My Accounts" button.
    - You will see a list of accounts that you can use. Check the box next to the one you wish to use and then click "Use Selected Accounts"
    - You will be returned to the Account information page. Make sure that the correct CFOP has been entered and that the "Valid" column has a "Yes"
    - If you need to enter another CFOP, see the **Using Multiple CFOPs** section below. If your purchase contains Fabricated Equipment, see the **Fabricated Equipment** section below. Otherwise, press the "Continue" Button.
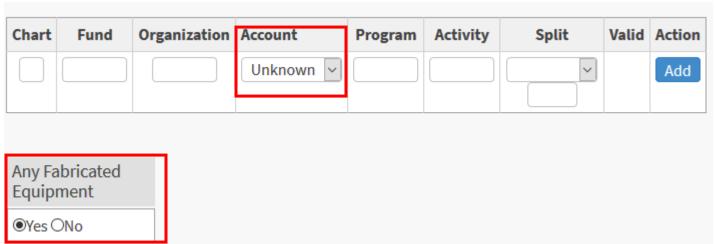
Using Multiple CFOPs:

Chart	Fund	Organization	Account	Program	Activity	Split	Valid	Action
☐						⌄		Add

There may be cases where you wish to use two or more CFOPs for a purchase.

- If you filled in your first CFOP manually, once you click the "Add" button, you should be given another line in which you can add another CFOP. Repeat the steps you used to enter the first CFOP.
- Split: This column should only be used if there are multiple CFOPs. This column will allow you to calculate the amount of money charged to each CFOP. When you click on the arrow, a pull down option will be displayed.
    - **Percent**: You may choose to divide the charge up through percentage. In the second box in the column, you would type in the percentage (without the %) of the total cost of the purchase that you want charged to that specific CFOP. You would do this for each CFOP that you have entered. Example: If you have 2 CFOPs and you want each to be charged half of the total, then you would put 50 in each box.
        - Make sure all the percentages add up to 100%, which can be seen in the TOTALs box that will appear.
    - **Amount**: (PREFERED METHOD) You may choose to put the exact amount that will be charged to each CFOP. Simply type in the amount (in $) that you wish to charge for each CFOP.
        - Make sure the amount you enter is equal to the total cost of the items you want purchased.

Fabricated Equipment:

Chart	Fund	Organization	Account	Program	Activity	Split	Valid	Action
☐			Unknown ⌄			⌄		Add

Any Fabricated Equipment
◉Yes ○No

If an item is considered Fabricated Equipment, you will be told this by a professor and also given a specific Account code to go with the CFOP (Ex. 128100). If you were not told this by a professor or instructor, keep the Fabricated Equipment box marked "No" and do not follow the instructions below.

- If the items you are purchasing are Fabricated Equipment, change the mark in the Fabricated Equipment box on your screen to "Yes"
- A Drop-down button will appear in the Account Column. Click on the arrow and choose the account code that you have been told to use.
- ***Note for Professors: To find out more about what is considered Fabricated Equipment and how to get a Fabricated Equipment code, please contact the Business Office***.

STEP FOUR: Vendor Information

Available Vendor Lists	Vendors
○ Used On My Previous Orders	[dropdown]
◉ Departmental List ○ Add a New Vendor	Please select a vendor.

Next you will need to tell us what vendor you want the item(s) to be purchased from. There are three ways to do this which can be seen in the "Available Vendor Lists" column.

*PLEASE NOTE: IT IS ALWAYS PREFERRED THAT YOU USE A VENDOR THAT WE HAVE WORKED WITH BEFORE AND ONE THAT WILL ACCEPT U.S. DOLLARS. PLEASE SEE THE **MOST USED VENDOR LIST** FOR A LIST OF VENDORS THAT WE USE THE MOST.*

- **Option 1**: Used on My Previous Orders: If you have used this app before and you are ordering from a vendor you have used previously, you may use this option.
  - Click the "Used on My Previous Orders" option in the Available Vendor Lists column.
    Note: Only Previously Used Vendors that are on the Department List will appear here.
  - Use the drop-down option list to choose a vendor that you have used before.
- **Option 2**: Department List: This is the option you will use most frequently. It will provide you with a list of some of the vendors that the Department has worked with before.
  Note: This list is incomplete. If you do not see the vendor you want on the list, this does not mean that we have not ordered from them, nor does it mean that we can't order from them..
  - Click the "Department List" option in the Available Vendor Lists column.
  - Use the drop-down option list to choose a vendor.

- Option 3: Add a New Vendor

There will frequently be times that the vendor you wish to use will not be on either of the previous options. If this is the case, you will need to add a new vendor.

- o Choose the "Add a New Vendor" option in the Available Vendor Lists column
- o In the Vendors Column:
    - (Required) Vendor: Put the Official Company Name
    - Address, City, State, Zip: If there is an address for the company, you may put this here.
    - Country: If you know what country the company is based out of, put that here.
      NOTE: U.S.A. companies are preferred but NOT required.
    - Phone, Fax: If you know the contact information for the company, place that here.
    - URL: Place the link for the homepage of the company's website here. This is especially recommended if it is an online-based company.
- o Click the "Continue" button when finished

    Note: Please fill out as much of the information about the vendor as you can.

    Important NOTE: Only one vendor should be used per request. If you have multiple vendors you wish to purchase from, please submit multiple requests.
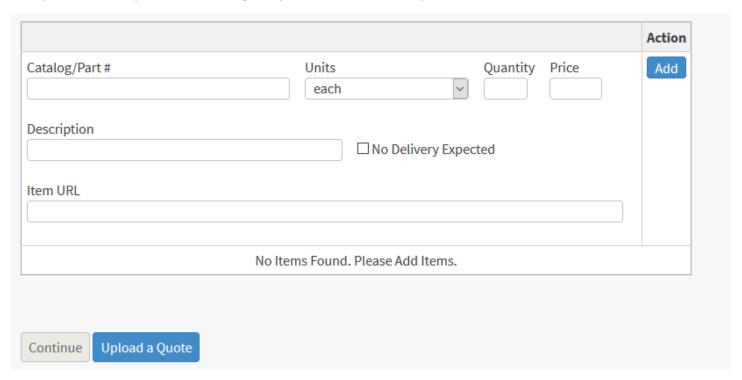
Most Used Vendor List
This is a list of the vendors that we purchase from the most.

Vendor Name	Website	Additional Notes
Amazon	www.amazon.com	
Digi-Key Electronics	www.digikey.com	Can share a cart. Include the Web ID and Access ID
Mouser Electronics	www.mouser.com	Can share a cart
McMaster-Carr	www.mcmaster.com	Can share a cart

PCBWay	www.pcbway.com	Will need to include account login information.
Sparkfun Electronics	www.sparkfun.com	
NewEgg	www.newegg.com	
Newark Electronics	www.newark.com	Can usually get a quote
Fisher Scientific	www.fishersci.com/us/en/home.html	Prices that we can get items at can differ from what is on the website.
Sigma-Aldrich	www.sigmaalddrich.com	Prices that we can get items at can differ from what is on the website
Grainger	www.grainger.com	Prices that we can get items at can differ from what is on the website
CDW-G LLC	www.cdwg.com	Prices that we can get items at can differ from what is on the website
Office Depot	www.officedepot.com	Prices that we can get items at can differ from what is on the website

STEP FIVE: Items

This is the part of the purchase request where you will add the items that you want purchased. You can request multiple items to be purchased in a single request. There are two ways to do this.

- **Option 1**: Listing Each Item (Mostly used for lists of 10 items or less)
    - Catalog/Part #: Put the unique item number, part number, or catalog number for the specific item.
    - Units: Leave this as "each" unless the description of the item says otherwise. (Ex. $5 for 5-pack)
    - Quantity: How many of this item would you like?
    - Price: What is the price for this item? (Do not include tax or shipping)

- Description: Put what the item is called (different from the Part #). If there is something specific about the product that you want (ex. Length, color, voltage, etc.), include that here.
- No Delivery Expected: ONLY click this if the item you are purchasing is not a physical item (ex. Software that is downloaded)
- Item URL: Provide a website link to the item
- Press the "Add" button in the Action column
- Upload Quote button: If a quote is provided, please upload it here.
- When done, click the "Continue" button
- **Option 2**: Using a quote or cart:
  Sometimes you will be ordering many different items at once and it is easier to either list a quote or share a cart. There will also be times where you are provided with a quote for a complicated item and it is simpler to request the purchase of all items on the quote.
  - Catalog/Part #: Put the Quote # or the Cart number.
  - Units: Keep this at "Each"
  - Quantity: Put 1
  - Price: Put the total amount for the entire cart or the total of the quote
  - Description: This is where you would put any information that is needed to identify the cart or quote. Ex: With DigiKey carts, you would put the Access ID and Web ID of the cart so that the person doing the purchasing can make sure they are getting what you want.
  - Item URL: This is where you would put the link to the cart. You would typically get this link by sharing a cart. If it is a quote, you can leave this blank.
  - Upload a Quote button: If you have a quote from a vendor, upload it here.
  - Press the "Add" button in the Action Column
  - When done, click the "Continue button"

STEP SIX: Delivery Information

This is where you will tell us where and when you want the item(s) shipped to. You will also have the opportunity to note anything else that you think might be useful to the business office.

Delivery Information	
Ship To	⌄ ☐Other (Off Campus Address) Please select a department for shipping locations.
Delivery Date Requested	
Shipping Type	1-5 Business Days ⌄
Comments/Special Instructions	

Continue

- Ship To: Use the pull down button to select which Campus department you want the package delivered to. (Typically this will be ECE). Then choose from the addresses provided.
  - If the address you want the items shipped to is not on the list (Ex. Off-Campus University Lab), click the 'Other' box and fill out the address that you wish for the item(s) to be shipped to.

  NOTE: We WILL NOT ship items directly to your personal address unless there are special circumstances that have been approved prior to the request.
- Delivery Date Requested: If there is a specific day that you want this item by, you may place that here. Otherwise, leave it blank.

  Note: We will always try to get your item to you by the date you request, but we have no control over how fast a vendor ships items out.
- Shipping Type: Choose how fast you wish to ship the item(s). This will normally be 1-5 business days. Keep in mind that requesting a faster shipping type could result in extra money spent on shipping charges and will also depend on the shipping preferences of the vendor.
- Comments/Special Instructions: This is where you will note anything that will help the Business Office make the purchase. Examples include, but are not limited to: reasons for the purchase, anything that will not fit in the Description box of the item, payment information, random funny comments to make the purchaser laugh, etc.
- Click the "Continue" Button when you have finished

STEP SEVEN: Review and Submit

This is where you will be able to review your purchase request, make any changes needed, and describe what the business purpose is for this purchase.

Order Total

Your order total amount is $##.##

The account(s) appproval will be routed to the following people:

- 1-XXXXXX-XXXXXX-XXXXXX
  John Smith (smith@notarealemail.com)

Your order will be routed to the Electrical & Computer Eng Business Office.   Change ()

- The first thing you will see on this page will be the total amount of your request followed by the CFOP(s) that you entered and who approves the requests for purchases on that CFOP. Once you complete your request, it will be sent to that person/people for review.

  Note: It is considered courteous to send the person who is reviewing your purchase an email to let them know they have something to approve.
- If your request is approved, it will then be sent to the Business Office, which is mentioned next on your screen. You will not need to change this.
- You will then see a review of your actual request. Please review each section and make sure everything is correct. If you need to change anything, click the "Revisit" link on the box that you wish to change.

- Lastly, you will need to put a business justification for this purchase. This is a description of why this purchase is needed and usually includes what class it is for, etc.

  Note: You will not be able to submit the purchase request without a Business Justification

- Once you are sure you have completed your purchase request, press the "Submit Order" button at the bottom of the screen.

Now you are done with your Purchase Request! Congratulations!!
Thank you to everyone who helped to create these instructions!

Commonly Asked Questions and Facts

- Purchases that total $5,000 or less and do not require any signatures or approvals from the University will be done with a credit card. Purchases that total above $5,000 or require a signature or anything similar from the University will need to be bought with a Purchase Order (PO). Using a PO may take longer to complete and might require more paperwork and explanation from the requestor before a purchase can be made.

- If your requested has been processed and purchased, yet you have not yet received your item, please contact the Business Office and/or the 'owner' of the request.

- **How long will it take for a request to be processed?** Once a request has been approved, most purchases will be worked on by the Business Office within 24 hours. If there is no extra paperwork needed and the purchase can be made with a credit card, then the purchase will typically be made soon after the request is received. If a Purchase Order (PO) is required for a purchase, it may take longer to complete the process as there is another review/approval system that it must go through.
  Note: The Business Office will always do its best to get your purchase done as quickly as possible. However, as we may process several dozen purchases a day, during times of high-demand, there may be a slight delay.

- **Will I be notified when my purchase is made?** You will receive automatic emails from the app when your purchase has its status changed. Beyond that, it is the Business Office's practice to forward any email they receive concerning your purchase to you (Ex. Order confirmations, shipping notifications, etc.)

- **Where can I look up my purchases and see what status they are in?** You can go to http://my.ece.illinois.edu, where, after signing in, you can go to the Purchasing page and review your purchases and see what status they are in.

- **Who can I ask for help with the Purchasing App?** Anyone in the Business Office within the ECE can help you, but the best people to ask are currently the Office Manager Beverly Curtis (bcurtis@illinois.edu) or the Office Support Associate Erin Kristovich (emk@illinois.edu , 217-300-9146).

- **My order has had a status of "Approved" for a long time! What is going on?** Just because the status simply says "Approved" does not necessarily mean that the items have not been purchased. Sometimes the purchaser will hold off on putting a request in the "Purchased" category until all the paperwork on our side has been completed. The first thing to do is look at your request and see if there are any notes from the purchaser anywhere on it. Each request is claimed by the person doing the purchasing. If you have more questions, you may ask the person who "owns" your request.

- **My order has had a status of "Processed" for a long time! What is going on?** This will most likely happen if your purchase requires the use of a Purchase Order (PO). Once the Business Office creates the PO, we will forward it on to be approved and will change the request's status to "Processed". Sometimes POs can be approved within 24 hours, but other times it may take several weeks for a PO to be approved. Unfortunately, the Business Office may not have much control over when a PO gets approved. Ask the 'owner' of the request for more details.

- **I submitted my request but it has not been approved yet! Why?** The best thing to do if this happens would be to email the person who is assigned to be the approver for your request. You can see who this is if you look at your request.

- **I can't find a Catalog/Item number for an item I want to get purchased.** Sometimes part numbers are not displayed at the top of a screen. You may need to scroll down the page to get to a part number. If you cannot find a part number, then provide something that will allow the purchaser to make sure they are purchased the EXACT item that you want. If you are very concerned about it, you may take a screen shot of the website page that has the item you want and download it in place of a quote.