

### **Users – My Purchases View**

Anyone can place an order within the purchasing application. When you log in the screen should resemble the following image, and the page lists current orders you have placed and their current statues.

Purchasing -	My Purchases						App information ::	Return			
My Purchases Documentation											
						Status Key		Show			
Create Ne	w Order					Status	Description				
	1		1								
Order	Request Routed	Vendor	Total Amount	Date Requested	Status	Tracking	Action				
Number					(Section)	#'(S)					
			No Current C	Orders Found!							

#### **Placing an Order**

• To Place an order click the 'Create New Order' button.

Purchasing	- My Purchases						App information ::	Return				
My Purchases Documentation												
						Status Key		Show				
Create N	ew Order					Status	Description					
Order	Request Routed	Vendor	Total	Date Requested	Status	Tracking	Action					
Number			Amount		(Section)	#'(s)						
			No Current O	orders Found!								

New Orders through Purchasing Wizard – completed either by student or PI (Principal Investigator)

#### **Personal Information**

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 Account Information	3 Vendor Information	Attems	5 Delivery Information	6 Review & Submit	<b>7</b> Request Completed
Requestor Name	Patts Tong	•				
Phone						
Principal Invesigator (netID)	- State State					
Continue						



#### Account Information

PIs have the ability to pick from your accounts assigned in to you in Chart of Accounts. Students please enter an account number you have been instructed to use for the purchase. Here is also an option to "View My Accounts" which display accounts used on past orders, or accounts for which you are assigned a user. Click "continue" to select/enter vendor information.

Purcha	sing - Or	der							
1 Pers	onal Info	rmation 2 A	ccount Info	ormation	3 Vendor Inform	nation 4 Items	5 Delivery Information	6 Review & Subm	it 7 Request Completed
Chart	Fund	Organization	Account	Program	Activity	Split	Valid	Action	
						•		Add	
381				100000			Yes	x	
Any Fa Equipn	bricated nent								
Conti	nue	View My Acco	ounts						

#### **Vendor Information**

Pick from vendor used on your previous requests/orders or department approved vendors. Or enter information for a new vendor. If for some reason you do not have the vendor address that is ok, however you must include the vendor name, and where possible, a URL. Click "continue" to enter items.

Purchasing - Order						
1 Personal Information 2	Account Information	Vendor Information	angle 4 Items $ angle$	5 Delivery Information	6 Review & Submit	7 Request Completed
Augusta Mandan Linta	Vender					
	vendors					
Used on Previous Orders	WW Grainger Inc/Grain	iger 🔻				
Departmental List	$\odot$	$\bigcirc$				
Add a New Vendor	Address Unknown	2356 5	outh Ashland	Avenue		
	Note: Select this option if are unsure of the address.	you Chicag	io, IL 60608			
	$\odot$	•				
	1017 Southwest Jefferson Peoria, IL 61605-3948	Avenue				
Continue						



#### Items

Enter in the items you would like to have purchased. Select "Upload a quote" or "continue".

Purchasing - Order									
1 Personal Information	2 Account Information	3 Vendor Information	$\left  \right\rangle$	4 Items	5 De	livery Information	6 Revi	ew & Submit	> 7 Request Complete
Catalog/Part #	Description		Units	Quantity	Unit Price	Ext Price	Action		
Catalog/Part #		Units				Quantity	Add		
		each			•				
Description					Price	_			
R34345	Paper		each	2	\$5.25	\$10.50	Х	-	
#2	Pencil		each	12	\$0.25	\$3.00	Х	-	
Totals				14		\$13.50			
Continue Upload a	Quote								

#### Upload a quote

Enter <u>each</u> item from the quote as this allows the PI to view for approval. PI/Faculty placing their own order, may enter Quantity1 and total quote Price, then in Description indicate to "See Quote" and purchase all items:

Purchasing - Order							
1 Personal Information	2 Account Information	3 Vendor Information	4 Items	5 Delivery Information	n 👌 6 Revi	ew & Submit	7 Request Completed
Documents Uploads		File Troe			Action		
Type: Price Quote 👻		гле туре			Action		
Price Quote Untitle	d-1.png				х		
Continue Items							

#### **Delivery Information**

Pick a location you want to have items delivered to. During COVID, if wishing to have delivered to your residence click OTHER (off campus location) to add your location and address. As this is an exception to campus policy, please make this request as part of your Business Justification.

Purchasing - Order						
1 Personal Information 2 A	Account Information	3 Vendor Information	4 Items	5 Delivery Information	6 Review & Submit	<b>7</b> Request Completed
Delivery Information						
Ship To	MRL Shipping 104 S . Goodwin Room 190N Urbana, IL6180	g and Receiving n Ave 1	-			
Delivery Date Requested	07/21/2012					
Shipping Type	1-5 Business	Days 🔻				
Comments/Special Instructions						
Continue						



#### **Review & Submit**

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.

Purchasing - O	rder										
1 Personal In	nformation	2 Account Information	3 Vendor Information	4 Items	5 Deliv	very Informati	on 6 Re	view & St	ubmit	7 Request (	Completed
		Your order v	vill be routed to the Materia	als Researc	h Lab Bu	siness Office.					Change
Your Informati	ion		Rev	sit Delive MRL S 104 S	ry Inform Shipping a Goodwi	i <b>ation</b> and Receiving n Ave					Revisit
PI:	C COMPLEX N			Room Urban Date I Shipp	190N a, IL6180 Requeste ing Type:	11 d: 7/21/2012 1-5 Business	Days				
Vendor Inform Adorama Educ 42 West 18th New York, NY	a <b>tion</b> cation and Pu Street 10011	blic Sector	Rev	sit Comn	nents/Spe	ecial Instructi	ons				Revisit
Items											Revisit
Catalog/Part #		Description	Units	Qu	antity		Unit Price		Ð	t Price	
R34345		Paper	ea	2	2 \$5.25 \$10.50						
#2		Pencil	ea	12	12 \$0.25 \$					\$3.00	
Documents Ur	ploads		Rev	sit Accou	int Inform	nation					Revisit
Туре		File		Chart	Fund	Organization	Account	Program	Activity	Split Type	Value
Price Quote	Untitled-1	png		1			-				
Project Descri	iption					Pleas	e describe	the purpos	se for buy	ring the good	d or service
Submit Orde	er										

#### **Request Completed**

Upon Submitting your order, you will be directed to a page that shows your completed order. The page will also display where the order went; Business Office or Account User/Owner for approval.





### Viewing your order

Click on the order number hyperlink to view order details, and the current status. When the order is completed the Requester will receive an email notification.

Order Status T	racker											
		Request			Purci	nase				Delive	ry	
	Requested	Appro	oved	Processed		Pu	irchased	1	Received		Picked	-Up
Status	Completed	l Comp	leted	Pending								
Date	7/17/2012	7/17/2	2012									
Time	10:48:27 AM	M 10:48:2	27 AM									
Name		Auto Apr	proved									
				,	Urbana	, IL61801						
Vendor Inform Adorama Educ 42 West 18th S New York, NY 1	ation ation and Public Sec Wreet 10011	tor			Urbana Date R Shippir Comm	, IL61801 equested ig Type: 1 ents/Spec	: 7/21/2012 -5 Business sial Instructio	Days ons				
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Vendor Inform Adorama Educ 42 West 18th S New York, NY 1 Items Catalog/Part # R34345 #2 Documents Up Type Price Quote	ation ation and Public Sec street 10011 Des Pap Pap Ioads Untitled-1.png	ctor scription ber ncil File	Units ea ea		Urbana Date R Shippin Comm Qua 2 12 12 Accoun Chart 1	n, IL61801 equested ug Type: 1 ents/Spec ntity nt Informa Fund 200250	tion 220001	Unit Price \$5.25 \$0.25 Account Unknown	<b>Program</b> 220050	E S S Activity C14	xt Price 10.50 3.00 Split Type	Val
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# Faculty/PI Approvals

You will receive an email which requires order/account approval:

From:	to an and								
To: 📕 🖬 👘									
Subject: Purchasing	- New Pending Approval for Order	equest							
Dear , The order below has I Please Review Order <u>Approve Order</u> - Note: F If the links above are <b>Summary</b>	Dear, The order below has been submitted on one or more of your accounts and requires approval. Please Review Order Details and Confirm by clicking on one of the following responses: <u>Approve Order</u> <u>Reject Order - Note</u> : Rejected orders will require a comment. Please be clear: Wrong account number, Amount too much, Items not needed, etc. If the links above are not working, please go directly to <u>https://my.mrl.illinois.edu/purchasing/pending.asp</u> to view pending requests. You will be required to log in. Summary Status:								
Status: Total Amount: Requested By: Date Requested: Requested Delivery I Shipping Type: Shipping Address: Vendor: Items Details	Requested \$1,030.00 Douglas Jeffers 7/16/2012 4:00:00 PM Date: 1-5 Business Days MRL Shipping and Recei 104 S . Goodwin Ave Room 190N Urbana, IL 61801 Innovative Vacuum Solut	ing ons Incorporated							
No. Catalog/Part #	Description	Units Qty Unit Price Ext Price							
1 Edwards RV-12	Vacuum roughing Pump Re 996115658	air Serial # each 1 \$1,030.00 \$1,030.00							
Accounts									
No. Account									
1									
Other Approvers									
None									



## **Available Approval Notifications**

- Approve Order
- Reject Order

Note: This does not require you to log in, but will take you to a screen to enter in comment and submit approval or rejection.

## **Approving/Rejecting Orders**

Click Submit to approve the order. Note: This does not require a comment.

Purchasing Approval	Return
Approve Order	
h	
(Maximum characters left: )	
Note - Comment is NOT Required for Purchases that are Approved - Comment will be viewable by Requestor and Business Office.	

**Reject Order**: Click this link to reject the order. Note: This <u>does require</u> a comment; the button to "Submit" your rejection requires a minimum of 6 characters, before it will become active.

Purchasing Approval	Return
Reject Order	
(Maximum characters left: )	
Submit	
Noto	
- Comment is Required for Purchases that are Rejected	
<ul> <li>Please be clear: Wrong account number, Amount too much, Items not needed, etc.</li> <li>Comment will be viewable by Reguestor and Business Office.</li> </ul>	