BUY IT
EMARKETPLACE

YEAR-END ACTION ITEMS AND REVIEW OF PROCUREMENT PROCESSES

ILLINOIS TECH

Agenda

01 Year-End Action Items

02 Review of Buy It Processes

03 Navigating within Buy It

04 Procurement Updates

05 Questions & Answers

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Closing FY25

Purchase Orders

- Requisitions for FY26 activity will be deleted from the system - departments will be required to re-enter the requisition in Buy It in the new fiscal year starting June 1, 2025

- Open FY25 purchase orders (standard & blanket) will be closed in most cases after May 31, 2025 - departments will need to enter new requisitions to encumber funds in Buy It for FY26

- FY25 purchases fully received in FY25 will hit FY25 expenses - deliveries and services received after May 31, 2025 will be charged to FY26 expenses

Closing FY25

- **Final FY25 PO Activity** - In May, FY25 purchase orders should only be entered if they will be delivered and fully invoiced by 5/31/2025. Purchase order activity from 5/1 - 5/18 will be closely monitored and only approved if **absolutely essential**. On 5/19, purchase order activity will be paused to resume on 6/1/2025 for FY26

- **If a purchase order covers a service that is delivered both in FY25 and FY26, please submit the entire requisition against the prepaid account 1923** - Procurement Services and General Accounting will then reallocate the FY25 portion to your current year expenses after invoice payment

- **Expense Reimbursements** – Expense reimbursements for FY25 must be submitted and fully approved (have a status of accepted or downloaded) by **5/23/2025**

Paying FY25 Invoices: Important Dates

- All invoices for FY25 purchases must be received by Accounts Payable at **invoicing@iit.edu** by 12pm on Friday, June 6, 2025

- If an invoice is NOT received by June 6, 2025 for goods/services provided before May 31st, contact Accounts Payable (invoicing@iit.edu) by 12pm on Friday, June 13, 2025 to accrue the expenditure to FY25

NSF **Budget Checking**

- NSF budget checking is currently turned on so purchase orders cannot be processed and invoices cannot be paid unless there is available budget in the FOAP submitted on the order/invoice
- Budget availability can be checked in Banner using FGIBAVL

- If there is not enough budget available to cover the cost of the purchase order/invoice, a budget transfer will need to be completed
- Connect with **Kris Moorman** and **Bizi Obedi** in the Budget Office

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Procurement Cards

Obtaining & Using a
PCARD

-To Obtain a PCARD you will need to

    1. Complete the **Application for Procurement Card Form**

    2. Receive **approval** from your **Department Budget Manager**

    3. Send the application over to **pcards-group@iit.edu**

-Once the PCARD application is received it will be sent over and reviewed by the **budget office for approval**

-After the PCARD is approved the procurement office will request a new card from PNC

-In the meantime, please complete and send over (email **pcards-group@iit.edu**)

    o The PCARD training on Canvas

    o Obtain a 100% on the PCARD test

    o Review and sign the Cardholder Agreement, this will be sent over by the procurement office

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Credit Limit Adjustments

- All PCARD limits are refreshed the 16th of each month.
- If you are in need of a credit limit increase please fill out the **Request for PCard Limit Increase** and send to **pcards-group@iit.edu** for Procurement services and the Budget office to review.

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PCARD Reconciliation - Audit Priority

- PCards should only be used for **essential purchases**

- Cardholders have 30 days to reconcile PCARD transactions after the end of each billing cycle ending on the 15th of each month. PCARD reconciliation MUST be completed every month and includes the following 3 steps in VISA Spend Clarity:
  - o Update business purpose / description for each transaction
  - o Attach receipts or Missing Receipt Affidavit to applicable transactions
  - o Approver's approval in VISA Spend Clarity

- **Reconciling Transactions for Someone who has Left the University**
  - o If an individual has left the university, it is the department's responsibility to reconcile any PCARD transactions still outstanding on that individual's PCARD. Please reach out to Cate Parks to indicate who this process should be delegated to within your department

- **Fraudulent transactions reconciliation process**
  - o Fill out a dispute form for each transaction and send to **pcards-group@iit.edu** once completed.
  - o Once dispute form is approved by Bank, you will use this dispute form to complete reconciliation

- **Consequences of being delinquent on completing reconciliation**
  - o If you have outstanding reconciliation from the previous months, you will first receive an email then the card will be turned off until reconciliation is completed

Locating Transactions to Reconcile

Transaction FOAP Information

- How to change your Default FOAP

Amount	Date	Issuer	Merchant category group
2.11 USD	05/22/2024	PNC Bank 1940 (2896)	✕ Eating And Drinking Places

Coding	Details

Expense template

1

Amount incl			Fund	100000	Unrestricted Fund
2.11	USD				
Tax code		⌄	Org	6505	Purchasing and Procurement Off
Tax amount					
0.00	USD		Account	7404	Meals
⅄ Split			Prog	3100	IIT Online

*If you need access to additional FOAPs please contact **pcards-group@iit.edu***

How to Resolve PCARD Issues

- Visa Spend Clarity Spend Mgmt. User Guide and Approver Guide can be found on the Procurement Services website

- If you are having trouble logging in to VISA Spend Clarity, are not receiving your 2-factor authentication code, or need to change who reviews / approves your PCARD expenses, please contact **pcards-group@iit.edu**

- **Personal Use of Illinois Tech PCARD Reimbursement Process**
    o If you accidentally used your Illinois Tech PCARD for personal use, you will need to reimburse the university for the amount of your personal expenses
    o You can make the reimbursement electronically via our **Online Pay Site** for Procurement Card Reimbursements
    o Please upload your online reimbursement confirmation email as a "receipt" to your PCARD transaction and complete the reconciliation process

    If the PCARD is used frequently for personally use, PCARD privileges will be permanently revoked

Buy It
Access

Gaining Access to Buy It

- If you need access to Buy It you will need to fill out the Buy It New User Registration Form
  - o In this form you will need to fill out:
    - Your Illinois Tech Email
    - First Name
    - Last Name
    - MyIIT Portal Username
    - A#
    - Role
      - Student
      - Faculty/PI
      - Staff Member/Admin Coordinator
    - Department
- If you need an individual added to your expense dropdown please provide the individual's name, email, A#, and the department they are associated with

Buy It **User Roles**

Role	Description
Buyer	Shop the marketplace. Create requisitions. Complete reassigned requisitions from users with the Browser role. Create Supplier Requests, if the feature is enabled. Can create blanket orders *Individual will need Banner Finance access ([Banner Finance Security Form](#))
On Behalf of Expenses	Expenses menu visible. Create expense claims on behalf of other users in your org unit (department).
Expenses	Expenses menu visible. Create expense claims on behalf of other users in your org unit (department).
Browser	Shop the marketplace. Create incomplete requisitions to reassign to Buyers within their org unit. Create Supplier Requests, if the feature is enabled. The Browser role cannot be used with the Buyer Role. Cannot complete blanket orders

Procurement Process Review

Correct Procure-to-Pay Process
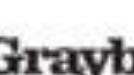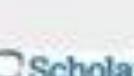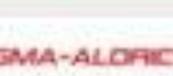
- The correct procure-to-pay process must be followed to be compliant with Illinois Tech's Procurement Policy.

- It is the responsibility of ALL Illinois Tech individuals to ensure that University resources are used in the most responsible, effective, and compliant way.

- **The Correct Procure-to-Pay Process at Illinois Tech**

1	2	3	4	5	6
Identify Needs	Sourcing / Vendor Identification	Enter Requisition	PO Issued / Vendor Start Work	Vendor Email Invoices To AP	Invoice is Approved and Paid

  o All New Supplier Requests MUST go through Buy It

  o Retrofit orders, or entering a PO in order to pay an invoice is not policy compliant and generally not permitted. Recurring purchases should be paid against a blanket order

Preferred & Catalog Suppliers

- Allows Buy It users to make purchases through the supplier's online catalog. Once a cart is filled, it is brought back to Buy It to complete checkout

- Many Illinois Tech Preferred Vendors have Buy It online shopping catalogs

- All Illinois Tech Preferred Vendors will have the BUY IT PREFERRED sign next to their name in Buy It; you do not need 3 quotes or SSJ when you purchase from an Illinois Tech Preferred Vendor, even for requisitions >$10K

Non-Catalog Items

- Use the Item Name field for important information for AP/Vendor, such as Acct. #, Quote #, Reference #, so vendor knows where to apply the payment, or WIRE TRANSFER so AP knows not to generate a check for the vendor

- For Wire Transfer Request, MUST:
  - Inform Cate to tag the vendor as Wire Transfer during supplier request process
  - Attach invoice and completed Wire Transfer Request Form
  - Can be made in foreign currency

Wire transfer orders will be routed to Ken Johnston and Aimee Harpt in the Controller's Office to process

Create ∧

Non-Catalog

Blanket Order

Request Quote

Create a Non-Catalog Item

Supplier
Blick Art Materials

*Item Name
Acct#, Invoice#, Quote#, WIRE TRANSFER REQUEST

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Blanket Orders

- A Blanket Order encumbrance should be used for any vendor / order for which you expect to receive more than one invoice for payment.

- **The Benefit of Blanket Orders**
  - o Create requisition and attach justifications once, then send all subsequent invoices directly to **invoicing@iit.edu** for payments and reference the Blanket PE #
  - o You can increase or decrease the encumbrance amount on your Blanket Orders at anytime

- **Examples of Blanket Orders**
  - o Monthly phone bills, water service, utilities, etc.
  - o Project-based services, independent contractors, consultants
  - o Equipment or supplies order expected to be shipped / invoiced over time

NOTE
DO NOT attach invoices to Blanket Order requisitions!! They will not be processed this way!
Email invoices to invoicing@iit.edu and reference the Blanket PE# in the subject line

Attaching Documents in Buy It

- Make sure you are uploading / attaching the appropriate requisition support and backup in the appropriate places in the Buy It requisition form
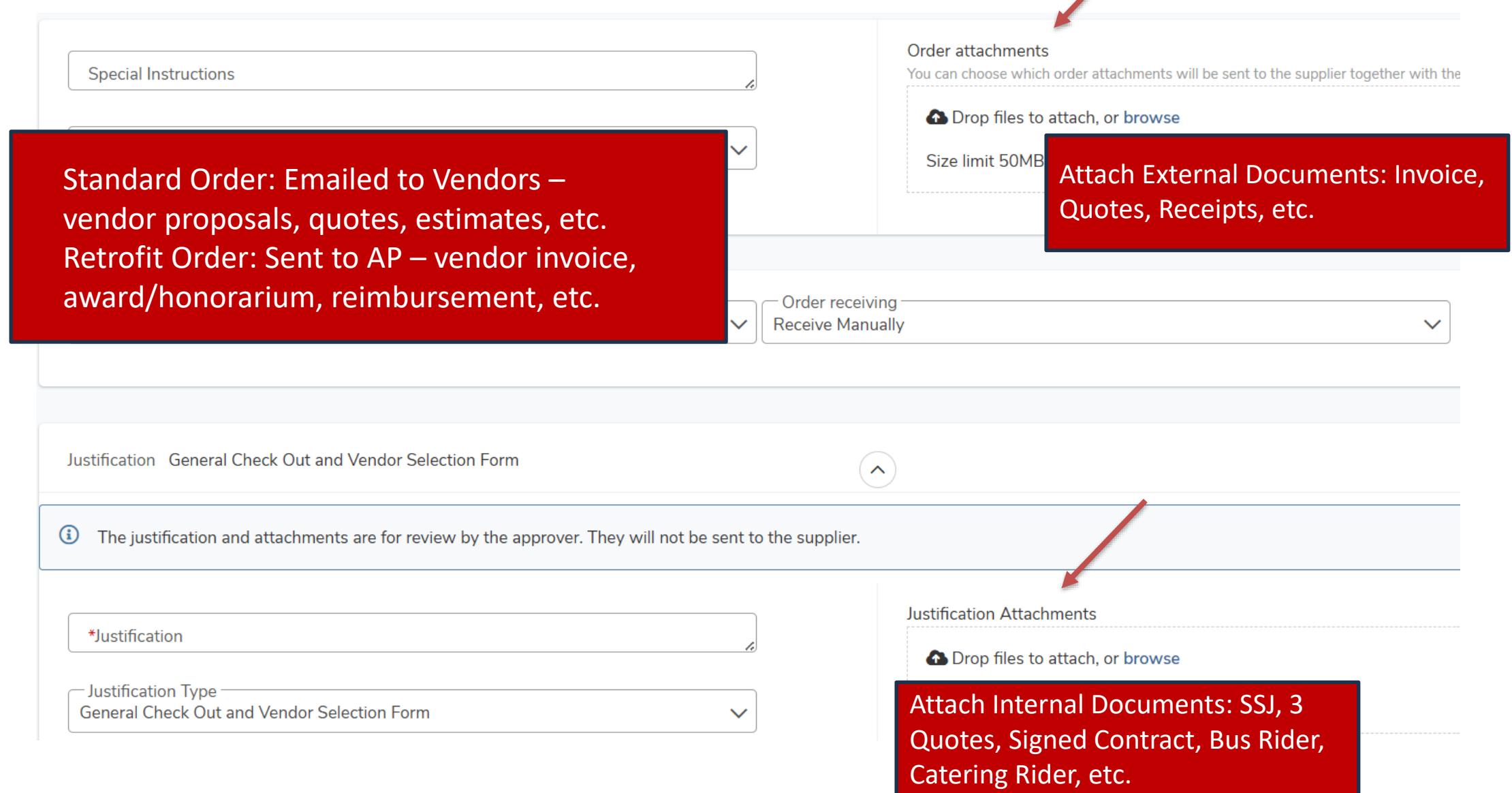
Special Instructions

Order attachments
You can choose which order attachments will be sent to the supplier together with the

☁ Drop files to attach, or browse

Size limit 50MB

Standard Order: Emailed to Vendors – vendor proposals, quotes, estimates, etc. Retrofit Order: Sent to AP – vendor invoice, award/honorarium, reimbursement, etc.

Attach External Documents: Invoice, Quotes, Receipts, etc.

Order receiving
Receive Manually

Justification   General Check Out and Vendor Selection Form   ⌃

ⓘ   The justification and attachments are for review by the approver. They will not be sent to the supplier.

*Justification

Justification Type
General Check Out and Vendor Selection Form

Justification Attachments

☁ Drop files to attach, or browse

Attach Internal Documents: SSJ, 3 Quotes, Signed Contract, Bus Rider, Catering Rider, etc.

Requisitions and Support Documents

Description	Support/Contract Required
> $10K in total requisition amount	• 3 Quotes or a Sole Source Justification if not using University Preferred Supplier or an active multiple-year contract
Independent Contractors / Consultants	• Agreement for Consulting Services
Catering	• Catering Rider
Charter Buses	• Bus Rider
Temp Employee Agencies	• Job Description Questionnaire • Justification for Temporary Employee • Agreement for Consulting Services • Rider for Contract for Hire Service - if not using Illinois Tech contract template
Performers	• Artist Agreement
Vendors Coming Onsite	• Contract including insurance language and COI required

Buy It
Vendor Registration

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Buy It
Illinois Tech's eMarketplace

All ∨ Search Products or Suppliers 🔍   🛒 ²

Marketplace

Purchasing

Lists

Orders

Transactions

Marketplace Home

Buy It - Illinois Tech's eMarketplace

Create ∨

Guided Buying

| 🏷 Buy It Preferred | 🏷 Diverse/Disadvantaged Suppliers | 🏷 Transportation | 🏷 Travel Related | 🏷 Scientific Supplies |

🔍 Find Supplier   ⬤ Favorites Only

5703 suppliers

Sort By
Premium First ∨   ≡ Filters

4imprint

4imprint ♡

👤 Premium Supplier
Promotional services

Adorama BUSINESS SOLUTIONS

Adorama Inc ♡

👤 Premium Supplier
Audio visual equipment accessories

Airgas.
an Air Liquide company

Airgas USA, LLC ♡

☁ Airgas for Illinois Tech
Visit Supplier

---

amazon business

Amazon Business, Inc. ♡

☁ Amazon for Illinois Tech
Visit Supplier

B&H

B & H Foto & Electronics Corp. ♡

☁ B&H Photo for Illinois Tech
359628 products

BIO-RAD

Bio-Rad Laboratories, Life Sciences ♡

☁ Bio-Rad for Illinois Tech
Visit Supplier

BLICK art materials

Blick Art Materials ♡

👤 Premium Supplier

CAROLINA
World-Class Support for Science & Math

Carolina Biological Supply Company ♡

👤 Premium Supplier
Forensic science teaching equipment and supplies

CDW-G ♡

C ♡

Club Colors ♡

demco ♡

Learning
Center ⁵

Buy It
Illinois Tech's eMarketplace

All ⌄   Search Products or Suppliers   🔍

Create Non-Catalog Item

Request Quote

Request Supplier

Marketplace

Purchasing

Lists

Orders

Transactions

🏷 Diverse/Disadvantaged Suppliers   🏷 Transportation   🏷 Travel Related   🏷 Scientific Supplies

Favorites Only   5703 suppliers   Sort By   Premium First

AdoramaBUSINESS SOLUTIONS
Adorama Inc
Premium Supplier
Audio visual equipment accessories

Airgas
an Air Liquide company
Airgas USA, LLC
Airgas for Illinois Tech
Visit Supplier

amazon business
Amazon Business, Inc.
Amazon for Illinois Tech
Visit Supplier

BIO-RAD
Bio-Rad Laboratories, Life Sciences
Bio-Rad for Illinois Tech
Visit Supplier

BLICK art materials
Blick Art Materials
Premium Supplier

CAROLINA
World-Class Support for Science & Math
Carolina Biological Supply Company
Premium Supplier
Forensic science teaching equipment and su

C

Club Colors

Demco

Learning Center 5

Request a Supplier

Buy It - Illinois Tech's eMarketplace > Request Supplier

Details

| Supplier Name * | Email Address * | Contact Number |

| Contact's First Name | Contact's Last Name |

Reason for requesting this supplier *

Email Address:
- A valid email address that can receive emails about Purchase Orders
- Needs to be the suppliers email address
- If we are paying an individual from IIT for services please DO NOT include their Hawk or IIT email

Reason for Requesting this Supplier
- Please be detailed
- If you are adding a supplier that offers supplies similar to a preferred supplier please provide why you are adding this supplier

Buy It Supplier Request Form

To request a new registered or lite supplier to be added to Buy It eMarketplace.

If you are requesting this vendor on behalf of a Researcher, Faculty Member, or anyone else in your department, please include the full name of the individual(s) who has the relationship with the vendor you are requesting. We will copy them on the status of the vendor enablement process. If not applicable, please put NA.

Requesting the Vendor On Behalf Of *

Is this a domestic (US) vendor or a foreign vendor (non-US)?

Vendor Type - US or Non-US *

Domestic or Foreign vendor

Is this vendor a honorarium or a reimbursement vendor?

Honorarium / Reimbursement *

Indicate whether this is an honorarium, reimbursement, or neither

Please describe the type of products or services to be purchased from this vendor.

Product/Service Provided *

Have you / Illinois Tech done business with this vendor before or is this a brand new vendor for the University?

Existing vs. New Vendors *

Do you anticipate to only use this vendor / pay this individual once? Or will you be using this vendor / paying this individual repeatedly going forward?

One Time vs. Repeat Vendor *   ← Frequent vs. Lite supplier

Will the vendor be performing work / services onsite at Illinois Tech campuses? And what is the nature of their work?

Insurance Assessment *   ← If the vendor will be coming onsite to Illinois Tech campus to perform any work, the vendor MUST provide a copy of the Certificate of Insurance including the specific language requested Illinois Tech General Counsel

If known, please provide the address that the check payment should be send to.

Vendor Address   ← This needs to be a valid mailing address

"I confirm that I have provided a valid email address above for my point of contact with this vendor."

Vendor Email Verification *

Drop files to attach, or Browse
Size limit 50MB.

Send Request

*Providing as much information as possible will streamline your request

Lite vs. Frequent **Suppliers**

One Time Vendor (Lite/Temp)	Frequent / Repeat Use Vendor

- The supplier **DOES NOT** have access to Buy It to manage their Profile
- **Types of Lite Suppliers:**
  o Reimbursements
  o Honorariums
  o Supplier we will use less than 2 times a year
- **Required for a Lite Supplier**
  o W9 or W-8 BEN
    ▪ Only time you DO NOT need this documentation is for reimbursements
  o Valid Email Address
  o Valid Mailing Address
- **Optional**
  o If the supplier is an individual (not a company) and would like to be set up for ACH payments:
    ▪ Include a W9 and a voided check or ACH details on bank letterhead
    ▪ If you do not have that information, please include in the request that they would like to be set up for ACH or VCard
	- The supplier does have access to Buy It to manage their Profile
	- **Types of Frequent Suppliers**
	  o Suppliers we will use frequently (3 or more times a year)
	- **Required for a Registered Supplier**
	  o Valid Email Adress (*Essential to send the supplier a registration link*)
	- **Optional**
	  o If supplier would like to be set up for ePayments please reach out to the Procurement Services

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Demo: Navigating Buy It

- Requisition status
- Approval status
- Expenses
- Viewing payment information
- PEs and Invoices - download report into Excel
- Completing receiving in Buy It or redoing receiving
- Adding a proxy in Buy It
- Buy It Contracts

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Finexio

- Finexio is Illinois Tech's payment vendor – when vendors receive Illinois Tech payments, they come from Finexio

- Illinois Tech offers 4 payment methods through Finexio with varying net terms
  o Check (default) Net 45
  o ACH Net 30 (ACH details on bank letterhead or voided check and updated W9 required for setup)
  o ACH Express Net 20 (ACH details on bank letterhead or voided check and updated W9 required for setup)
  o Virtual Card (VCard) Net 15

We highly encourage all vendors to sign up for electronic payments. Epayments are more secure and are issued to the vendor more quickly than paper checks.

For questions regarding these payment methods or to update the payment method of a supplier, please reach out to **Cate Parks** (**cparks5@iit.edu**)

Concur
Online Travel Booking

- **University travel** should be booked through the Concur online booking tool
  - Routes travel through to appropriate approval process
  - Charges the trip directly to a university FOAP

- **Travel Support**
  - Travel support is provided by Foremost Travel. If you need to change a reservation, complete a group booking or have questions about available options in Concur, please contact concur@foremosttravel.com
  - Procurement Services can assist with login issues, training or getting an account set up

- If you are concerned that Concur pricing is higher than elsewhere, please contact travel-group@iit.edu with documentation of the price difference and you will receive a response with guidance

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Gaining
Access to Concur

1. Complete [Concur Online Training](#)

2. Complete the Training Assessment (test) and achieve a score of 100%

3. Register for a Concur Account
   *Please make sure your manager is included on the registration form

4. Log in to Concur and complete your Profile

5. Questions? Contact travel-group@iit.edu

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New Gift Card Program
Greenphire Clincard

- Gift Cards are no longer issued through PNC

- Requesting Gift Cards

  - If you need gift cards for non-research purposes, please complete the request form available on the [Procurement Services website](#).

  - If you need gift cards for sponsored research activities, please contact Domenica Pappas and Lisa Litchman and they will provide further instructions

- Gift Card Requirements

  - Name, DOB, Email, w9

For questions related to gift cards, contact giftcardsupport@illinoistech.edu

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University **Procurement Programs**

University-wide Copier Program
Through IMAGETEC on competitive equipment leasing and copier/printer maintenance cost per page maintenance

University-wide Zoom Account
Available to all university employees and students, contact OTS for more information and account access, should not be purchasing any other conferencing solutions

UPS Campus Ship Program
Offers heavily discounted shipping costs, free supplies, and centralized billing process

R4 Shredding Program
Local, women-owned, competitive pricing and centralized billing

Buy It Amazon Business Prime
Free Prime shipping, centralized billing, 5-7% pricing discounts compared to regular Amazon

University-wide Procurement Programs Cont.

CDW-G

University preferred supplier for all Desktops, Laptop, IT Peripheral Products, and Supplies

Warehouse Direct

University preferred vendor for all our office supplies

Enterprise Car Rentals

University preferred vendor for vehicle rentals

Box Sign

Signature tool for routing contracts for signature

Adobe Suite

The full Adobe suite is now available in the Illinois Tech portal. If you are unable to access Adobe in the portal please contact the OTS Support Desk

The Procurement Services Team

MADELINE OLSZAK

Director, Procurement Services
Email: Molszak@iit.edu

Anything Procurement Related

CATHRYN (CATE) PARKS

Procurement Specialist
Email: Cparks5@iit.edu

Anything Procurement Related

LUZMARIE (LUZ) ARELLANO

Accounts Payable
Email: Larellan@iit.edu

Anything Related to Invoicing and Expense Reimbursements

ELENA MANCARI

Accounts Payable
Email: Mancari@iit.edu

Anything Related to Invoicing, Expense Reimbursements and Gift Cards for Non-Research Needs

Procurement

Accounts Payable

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Q & A

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