**User Guide – Purchasing Portal**

**To Create an Order:**

1. Navigate to <https://My.atlas.illinois.edu>
2. Log in



1. Choose “purchasing” from the “Finance Applications” dropdown



1. Click the “Create Order” button



1. Enter personal information



1. Click on “View My Accounts” to find CFOP’s/account numbers associated with you, or manually type in the CFOP you’d like to use. Also indicate if this purchase will contain items used to fabricate equipment by clicking the appropriate radial button, then click continue.



1. Indicate your vendor by either choosing from the department pre-loaded list (all are confirmed vendors in Banner), or enter the vendor manually. You don’t need to enter the exact address – just provide us with what you have (a link, name, etc.). If you choose a vendor from the dept list, it’s ok to choose “Address Unknown”.

**\*\*Please note: only one vendor should be indicated for each portal order. You can have multiple items from one vendor on a single order, but not multiple vendors. This is because each order is reconciled to a single Banner (system of record) transaction. Those transactions are separated by vendor because of the different vendor ID’s, billing, invoicing processes, etc. Thank you!\*\***



1. Enter the information you have for the item you’re requesting – the more info the better. The price may be cheaper through iBuy with our university discount – your CFOP will only be charged the actual vendor pricing for the item. *If* you received a quote from a vendor, please upload it on this page (not a requirement). Click the “Add” button when you’re finished entering your item details. If what you’re purchasing isn’t a deliverable (e.g. a membership), then click the “No Delivery Expected” button.



1. Keep adding items until you’ve completed your order. When you’ve completed your order, please hit “Continue”.



1. Enter your delivery information if applicable – if the desired dept/address isn’t available in the dropdown list, please check the “other” box and manually enter the delivery address. The delivery address for the Psych Bldg. is as indicated in the example below…
* Please also indicate your desired shipping method and the procurement team will request expedited shipping for you when requested – with the understanding that expedited shipping may incur extra charges.
* If someone else can pick up/receive your order, indicate that in the “Pickup Proxies” section. Please note that although you’re allowed to enter “required by” date, we cannot guarantee that the vendor will have the item in stock and that they can get it to us by your desired date – we’ll do our best!
* Please enter any comments or special instructions – Example: you might use this area to indicate that although you entered your PRO/ICR CFOP, you’d actually like to use Departmental funding for a portion of the expense (Faculty Funds/Wendy Bucks/Professional Development funds, etc.).
* Click continue when you’re finished.



1. Review your order, scroll to the bottom of the page, and enter the [business purpose](https://www.google.com/url?client=internal-element-cse&cx=008698976400077520715:pslvicxwvm0&q=https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx%3FitemId%3D388016&sa=U&ved=2ahUKEwj8iYyFmZXzAhWH754KHR5BDRsQFnoECAQQAg&usg=AOvVaw1nF90spH7uOveJUWhISdWl) of the purchase. This is especially important for grant-funded purchases. Enter the who, what, where, why/how it benefits the university. If you would like to see more robust directions/OBFS requirements for a proper business purpose justification, please use this [link](https://www.google.com/url?client=internal-element-cse&cx=008698976400077520715:pslvicxwvm0&q=https://www.obfs.uillinois.edu/common/pages/DisplayFile.aspx%3FitemId%3D388016&sa=U&ved=2ahUKEwj8iYyFmZXzAhWH754KHR5BDRsQFnoECAQQAg&usg=AOvVaw1nF90spH7uOveJUWhISdWl). 
2. Click “Submit Order” if everything looks correct. You may click “Revisit” in any sections to edit/add to the order. If your justification doesn’t meet the 100 character minimum requirement, just enter special characters to complete the field. This minimum is set by Engineering for all departments on campus that use this purchasing portal, and it can’t be adjusted by individual unit.



1. You will receive the following message…

