STUDENT THESIS BINDING
LINCOLN BOOKBINDERY
Updated process effective July 1, 2020

1. **Student or area staff submits a Purchase Request (PR) in Reaction.**
   a. This replaces the current PDF form that is filled out and brought to the Mailroom.
   b. **Important notes regarding the PR:**
      - Complete all standard PR information as requested/required on the PR screen
      - VENDOR field: Lincoln Bookbindery
      - COMMENTS field: Please include:
        o a) ADVISOR NAME
        o b) NUMBER of copies to bind
        o c) Ultimate DELIVERY LOCATION if Mailroom will need to deliver, or CONTACT INFO if student will come to pick up from Mailroom.
      - ITEM info field: Enter the following in specific fields:
        o Vendor Item Number: Thesis binding
        o Item Description: Standard format for (*indicate advisor*)'s group
        o Quantity: # of copies that need bound
        o Unit Cost: 55.00 *
        o Notes: Anything else you want to include
        Note that the cost per copy varies based on the total copies of the same title. Instead of having to look at a chart each time, we're just having everyone enter the highest amount to be consistent. The invoice will then likely be lower than the total PO, which is fine. I have included a current pricing list as an FYI.
      - PAYMENT information:
        o If all copies will be paid for by the same CFOP, select

        SELECT PAYMENT METHOD FOR THIS PURCHASE RE(
        ⦿ Pay With One CFOPA

        and then key in the CFOP on the next page.

        o If there will be multiple CFOPs used to pay for multiple copies, select

        ⦿ Split the Cost of Each Item among CFOPAS

        and then key in the CFOPs and the % on each.

        o *% examples: 2 copies on 2 different CFOPs → 50% on one, 50% on the other*
        3 copies on 3 different CFOPs → 33% on two, 34% on the third
        3 copies on 2 different CFOPs → 66% on one, 34% on the other

        o *Grant funds (start with 1-4xxxxx or 1-5xxxxx) are only allowed to pay for one thesis copy, assuming that it specifically benefits the grant. If they are getting more than one copy bound and they are using a grant, they must provide an additional CFOP for the remaining copies.*

** *Screenshots are included at the end of this job aid to use if needed.*

2. **Student or area staff prints off a copy of the PR (replaces the current PDF cover sheet) and brings the PR printout and thesis copies to the Mailroom.**
   a. Note that this is the same as the current process, except for what is used as the cover sheet.

3. **SCS Procurement staff submits the request for a PO based on the PR received.**

4. **UI Purchasing issues the PO, which is sent directly to Lincoln Bookbindery.**

5. **SCS Procurement updates the PR to indicate the PO # that has been issued and at the same time notifies the Mailroom that the PR is ready for delivery to Lincoln Bookbindery.**

6. **Mailroom delivers the thesis to Lincoln Bookbindery per current process, indicating the PO # so that Lincoln Bookbindery can match that up and submit the invoice referencing the correct PO.**

7. **Mailroom picks up the final copies from Lincoln Bookbindery and returns to the student/area office per current process and based on whatever arrangements were discussed with that end user (same as current process).**

EXAMPLE: FILLING IN FIELDS ON FIRST PR SCREEN:

CREATE A PURCHASE REQUEST

(* INDICATES REQUIRED F

NetID of Purchaser	msmith82 *
Phone Number	333-6298 *
Pickup Person (Name and email)	MARY SMITH msmith82@illinois.edu *
Pickup Person Phone Number:	333-6298 *
Perishable	No ∨ *
Room and Building to ship items to	338 NOYES LAB *
Purchase Request Category	All Other ∨ *
Inventory / Fabrication Number	(Required if you selected " Equip-works with exi
Requested Shipping Method	PICKUP ∨ *

☐ Check this box if you authorize an expedited delivery method to meet y preferred need by date.

Vendor	Lincoln Bookbindery
Group Category	Unselected ∨
Comments about this purchase request	a) Advisor: Jonathan Sweedler b) 3 copies c) Please call me when these are ready and I will come pick up myself from Receiving.

c) here may have alternate directions instead, based on the situation

☐ Check if you need to upload a file (quote, etc.) Must be in PDF format

Continue to the next step

EXAMPLE: FILLING IN FIELDS ON ITEM ENTRY SCREEN:

VENDOR ITEM NUMBER	ITEM DESCRIPTION	QUANTITY ORDERED	UNITS	UNIT COST	TOTAL ITEM COST	NOTES ABOUT THIS ITEM
Thesis binding	Standard format for Jonath	3	EACH ∨	55.00		

Standard format for Jonathan Sweedler's group