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 req:

          [ ] Pay With One CFOP

          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 CFOPs

          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

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>NetID of Purchaser</td>
<td>msmith82</td>
</tr>
<tr>
<td>Phone Number</td>
<td>333-6298</td>
</tr>
<tr>
<td>Pickup Person (Name and email)</td>
<td>MARY SMITH <a href="mailto:msmith82@illinois.edu">msmith82@illinois.edu</a></td>
</tr>
<tr>
<td>Pickup Person Phone Number</td>
<td>333-6298</td>
</tr>
<tr>
<td>Perishable</td>
<td>No</td>
</tr>
<tr>
<td>Room and Building to ship items to</td>
<td>338 NOYES LAB</td>
</tr>
<tr>
<td>Purchase Request Category</td>
<td>All Other</td>
</tr>
<tr>
<td>Inventory / Fabrication Number</td>
<td>(Required if you selected Equip-works with existing equipment)</td>
</tr>
<tr>
<td>Requested Shipping Method</td>
<td>PICKUP</td>
</tr>
</tbody>
</table>

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.

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:

<table>
<thead>
<tr>
<th>Vendor Item Number</th>
<th>Item Description</th>
<th>Quantity Ordered Units</th>
<th>Unit Cost</th>
<th>Total Item Cost</th>
<th>Notes about this item</th>
</tr>
</thead>
<tbody>
<tr>
<td>Thesis binding</td>
<td>Standard format for Jonathan</td>
<td>3</td>
<td>EACH</td>
<td>55.00</td>
<td></td>
</tr>
</tbody>
</table>

Standard format for Jonathan Sweedler's group

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