



State of Illinois  
Approver Only  
Process Manual #16  
V 1

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The information contained in this document is a general guideline for the processing of procurements using the State of Illinois BidBuy system. State of Illinois procurements must be conducted in accordance with applicable statutes and rules, including the Illinois Procurement Code. For any questions, please contact your Agency Procurement Officer (APO) or State Procurement Officer (SPO).

## **Introduction**

BidBuy is the State of Illinois's new web based, eProcurement system, designed to streamline procurement processes and offer expanded services. Once fully implemented, BidBuy will replace the Illinois Procurement Bulletin (IPB) for General Services, as the notification system for procurement opportunities; the Remedy System for creating Procurement Business Cases (PBCs); links directly to the Illinois Procurement Gateway (IPG); interfaces with AIS; and reports information to the PPB Clearinghouse. Further, the State will integrate BidBuy with SAP and the new BEP Certification System.

Those that perform only the Approval Only Role in have access to view and review all relevant procurement information in the system, including attached documents.

# BidBuy General Overview



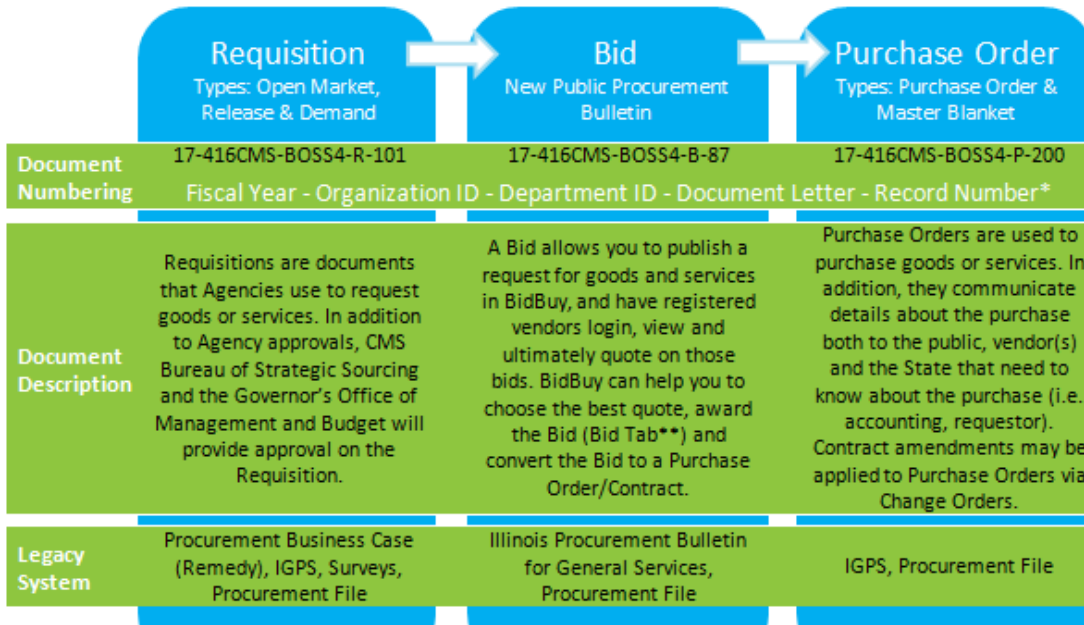
## General Overview

### User Roles

<p><b>Department Access (DA)*</b></p> <p>Department Access is the role for Agency requestors or end-users. Department Access gives users the ability to be a <u>requisitioner</u> or contract shopper.</p> <p>A <u>requisitioner</u> is a user who creates Requisitions from scratch, while a contract shopper is able to order from existing blanket contracts only.</p>	<p><b>Basic Purchaser (BP)*</b></p> <p>Basic Purchaser (BP) is the role for Agency purchasing staffs and APOs.</p> <p>Basic Purchasers can create all documents on the Agency side such as Requisitions, Bid, Purchase Orders and their related documents such as Amendments, Change Orders and revisions.</p>
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\* An approver may be configured as either a Department Access or Basic Purchaser. In addition, if a user's role is to approve only, they may be setup as a Department Access role with approval rights only, disallowing both requisitioning or contract shopping.

### General Document Structure

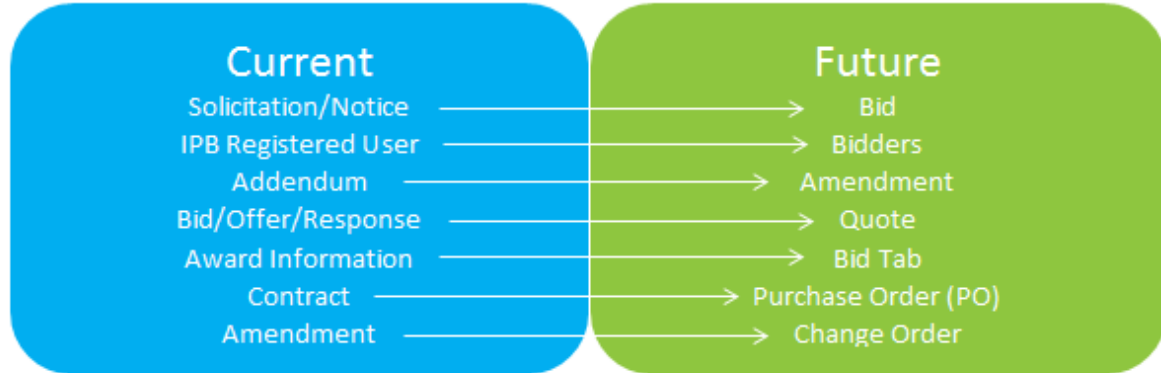


\* Record Numbers are generated based on a number wheel exclusive to each of the 3 documents. (i.e. Req, Bid, PO) As a result, a Requisition's record number may be 300, while the associated Purchase Order is 102.

\*\* The Bid Tab is a sub-document of the Bid where Vendor Quotes are tabulated, and where an award is recorded.

**Remember!** Use the symbol to quickly and easily search for any document available to you.

## Terms Crosswalk



## General Process Workflows

Included below is a high level walkthrough of the most common BidBuy process workflows.  
 - Each process step affords the opportunity for approvals to occur based on identified criteria, including Agency department, location, procurement amount, NIGP codes, user role and accounting.

**Small Purchase** – Begins with an Open Market Requisition, then converted to a Purchase Order.



**Competitive Solicitation** – Begins with an Open Market Requisition, which is converted to a Bid for public solicitation. Once quotes are obtained, the Bid Tab is opened and vendor is awarded. The Bid Tab is then converted to a Purchase Order.



**Release (Order Against Contract)** – Begins with a Release Requisition, then converted to a Purchase Order.



**Renewal** – Begins with an Open Market Requisition referring to the associated Purchase Order/Contract. The Requisition is converted to a Bid and the Bid Tab is completed with the renewal amount(s). Finally, a Change Order is created against the original Purchase Order/Contract for the Renewal terms.



**Change Order** – Begins with an Open Market Requisition referring to the associated Purchase Order/Contract. The Requisition is converted to a Bid and the Bid Tab is completed with the change order amount(s). Finally, a Change Order is created against the original Purchase Order/Contract based on the Change Order terms.



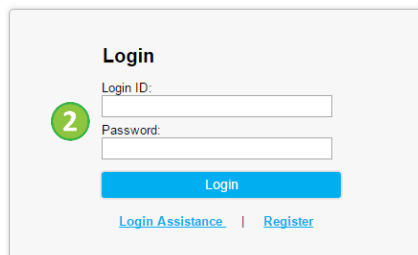
## BidBuy Approvals

Approvals paths are predetermined by the Agency, CMS, and the CPO office. Approval paths are based on the procurement's dollar thresholds, NIGP codes, and agency policy. Approval paths are loaded into the system and automatically triggered during the processing of the specific procurement. Approvers receive e-mail notification when an approval is required.

In addition to the pre-determined approval paths, approvers can be manually added to an approval path for a single procurement, providing greater flexibility in routing procurements and providing appropriate notification and approval of procurements.

### Login to BidBuy

1. Go to BidBuy at <https://bidbuy.illinois.gov/bs/>
2. Enter **Login ID** and **Password**, and click **Login**



The screenshot shows a login form titled "Login". It contains two input fields: "Login ID:" and "Password:". A blue "Login" button is positioned below the fields. At the bottom of the form, there are two links: "Login Assistance" and "Register". A green circle with the number "2" is overlaid on the left side of the form, indicating the step number.

3. Select **Basic Purchasing or Department Access** role from the Roles Tab.



If you have multiple roles, then each role appears as a different tab.

The screenshot shows the BidBuy Illinois Procurement system interface. At the top, there is a navigation bar with the BidBuy logo and a user profile for Laura Batson. Below this is a secondary navigation bar with tabs for 'Basic Purchasing', 'Department Access', 'Inquiry', 'Internal Administrator', 'Organization Administrator', and 'Vendor Administrator'. The main content area is titled 'Home - Welcome Back Laura Batson (Proxy User: Rachel Johnson)'. It features a navigation menu with 'Approval(6)' selected. Below the menu, there are two tables of documents pending approval.

Requisition #	Requisition Date	Description	Type	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-TEST-R-592</a>	04/21/2016	Pajamas	Open Market	05/10/2016 05:56:16 PM 05/10/2016 05:56:16 PM	EandCPM01 EandCPM01 Amy Adams Laura Batson	Waiting... Waiting... Waiting...	
<a href="#">16-AGENCY-TEST-R-431</a>	03/25/2016	Test RFP	Open Market	05/10/2016 06:00:52 PM	Laura Batson	Waiting...	

Bid #	Description	Bid Opening Date	Approval Requested	Approver	Approval Status	Date Approved	Approval Type
<a href="#">16-AGENCY-SCRIP-B-262</a>	Asbestos Assessment	05/11/2016 05:57:00 PM	05/10/2016 05:58:47 PM	Laura Batson	Waiting...		Pre-bid
<a href="#">16-AGENCY-TEST-B-252</a>	Farm Lease	05/03/2016 09:35:00 AM	05/03/2016 09:32:57 AM 05/03/2016 09:32:57 AM	SPO03 SPO03 Amy Adams	Waiting... Waiting...		Pre-bid

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">16-AGENCY-TEST-R-431</a>	03/25/2016	Test RFP	16	Open Market	Laura Batson	TEST / TEST	\$5,000.00

### Review Document and Attachments

Prior to approval, access the procurement and review all information related to approval. Information related to the procurement will be available on the BidBuy Tabs as well as contained in attached documents and forms. For a list of available forms by procurement, See Appendix B – Forms By Procurement Method.

On the **Approval** tab, procurements requiring approval will be located under either:

- **My Documents Pending Approval**
- **Documents Pending My Approval**

Documents are then organized by document types:

- **Requisitions**
- **Bids**
- **Purchase Orders**

1. Click **Approval** tab to list and approve documents pending user approval

2. Click Document # to view the procurement details

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs(20) Bids(25) **1** Approval(4) Receiving(99) My Reminders(1) Events(0) System Messages

**My Documents Pending Approval**

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	04/27/2016 08:29:45 AM	Basic Purchasing	Waiting...	

Purchase Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-12345-P-125</a>	12/22/2015	Open Market PO	12/29/2015 08:07:15 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	
<a href="#">16-AGENCY-12345-P-124</a>	12/21/2015	Open Market PO	12/21/2015 09:19:46 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	

**Documents Pending My Approval**

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	16	Open Market	Basic Purchasing	TEST02 / TEST2	\$5,000.00

[List & Approve](#)

**2**

3. Click main tabs to view information and attachments about the document

**Release Requisition 16-AGENCY-TEST-R-789**

**3** General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

**Header Information**

<b>Requisition Number:</b>	16-AGENCY-TEST-R-789	<b>Short De</b>
<b>Organization:</b>	State of Illinois	
<b>Department:</b>	TEST - Test Department	<b>Location:</b>
<b>Entered Date:</b>	06/15/2016	<b>Requisition</b>
<b>Requestor:</b>	Laura Batson	<b>Purchase</b>
<b>Contact:</b>	Laura Batson	<b>Contact F</b>
<b>Pcard Enabled:</b>	No	<b>Estimate</b>
<b>Solicitation Enabled:</b>	No	
<b>Invoice Method:</b>	Three Way Match	
<b>Ship-to Address:</b>	Stratton Office Building	<b>Bill-to Ad</b>

**Approve Documents**

After review of all information:

1. Click **Approval** tab to list and approve documents pending user approval



2. Click Document # and proceed to the **Summary** tab

Home - Welcome Back Basic Purchasing

News(0) Dashboard Reqs(20) Bids(25) P **1** Approval(4) Receiving(99) My Reminders(1) Events(0) System Messages

**My Documents Pending Approval**

Requisition #	Requisition Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	04/27/2016 08:29:45 AM	Basic Purchasing	Waiting...	

Purchase Order #	Purchase Order Date	Description	Approval Requested	Approver	Approval Status	Date Approved
<a href="#">16-AGENCY-12345-P-125</a>	12/22/2015	Open Market PO	12/29/2015 08:07:15 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	
<a href="#">16-AGENCY-12345-P-124</a>	12/21/2015	Open Market PO	12/21/2015 09:19:46 AM	Brock Fotis Brock Fotis Rachel Johnson	Waiting... Waiting... Waiting...	

**Documents Pending My Approval**

Requisition #	Requisition Date	Description	Account Fiscal Year	Type	Requestor	Dept/Loc	Total
<a href="#">16-AGENCY-TEST0-R-412</a>	04/21/2016	Small Purchase	16	Open Market	Basic Purchasing	TEST02 / TEST2	\$5,000.00

[List & Approve](#)

3. To add an additional approver, scroll to the bottom of the **Summary** tab and enter Order Sequence number *(Not a required step)*
4. Select **New Primary Approver** from drop-down *(Not a required step)*
5. Click **Add/Delete Approver** *(Not a required step)*
6. To approve document, select **Option to Approve**. To disapprove a document, select **Option to Disapprove**.
  - To add any comments, proceed to the **Notes** tab to include additional information that will stay with the document. After entering your comment on the **Notes** tab, select **Save & Continue**. If you enter a **Comment** on the **Summary** tab, it will be overwritten in the approve/disapprove procurement path.
7. Click **Save & Exit**

8. Click **OK** to save

**Approval Paths**

**Approval Path**

Delete	Order Sequence	Approver	Alternate Approver	Level	Date Requested	Date	Action
	1	Laura Batson (Proxy: Rachel Johnson)		1	06/16/2016 12:38 PM		

3 4

Add New Order Sequence  New Primary Approver

Add/Delete Approver 5

**Approval Actions** 6

Options  Approve  Disapprove  Cancel Requisition

Comment  7

Save & Exit

Cancel Requisition Clone Requisition Print

dev.bidbuy.illinois.gov says:

Are you sure you want to approve this requisition? 8

OK Cancel

## Logout of BidBuy

1. Click Log Out

NIGP Code Browse | My Account | Customer Service | About March 14, 2016 6:06:52 PM CDT

1 



**BidBuy automatically logs users off of the system after 30 minutes of inactivity; the user lockout for entering incorrect passwords is 15 minutes.**