Item Upload Instructions

Optional Use: the “Upload Items” feature in BidBuy allows you to create and edit line items in an Excel document outside the system so line items do not need to be created one at a time in BidBuy. This feature streamlines the process when adding a large number of line items. Please use the appropriate template provided (Req Item Upload Template, Bid Item Upload Template, or PO Item Upload Template) for a successful upload.

**User Role Requirements:**

1. Click on the Items Tab to verify you have the “Upload Items” button. If you do not, please contact [StateUser.BidBuy@illinois.gov](mailto:StateUser.BidBuy@illinois.gov). This simply means your user rights need to be updated.

**Creating the Item Upload Document**

1. Open the Req/Bid/PO Item Upload Template in Excel. The template is a .csv Document. (IMPORTANT: the file type of the template is saved in .csv (MS DOS) and must remain in this format for a successful upload. If you save it in another format, you will receive an error when attempting to upload.)
2. Enter line item information. The template contains many cells, but only the cells that are populated in the template example on row 2 are required to upload. Many of the populated cells are self-explanatory except for the Item Type, which needs to be populated with an “I” for each line item. Please note: “Item Type” is not used for PO Item Upload
3. Delete the example line item in row 2.
4. Optional: Once you have created all of the Items for your Req/Bid/PO, you may choose to “Save As” and rename this Document to something relating to your Req/Bid/PO Number for future reference.

* Note: Ensure that you save the Document as a .csv (MS DOS), as this is the required File Type for a successful upload.

1. You are now ready to upload this Document into BidBuy.

**Uploading the Document**

1. Click on the Items Tab on your Req/Bid/PO.
2. Click on Upload Items.
3. Click on Choose File and find the .csv File you edited/saved above.
4. Click Save & Exit. This will show a dialog box. Click OK.
5. This will take you back to the Items Tab where you will now see your Items.

* Note: this feature functions slightly differently if uploading at Req versus Bid. If uploading at Req, all line items will be replaced with each new item upload performed. However, uploading items at the Bid will not replace all items if the updated document contains fewer line items. It will only replace the information on those items with the corresponding Item Number. For example: if your Bid had 50 line items and now you only need 40 line items, you would need to manually delete the remaining 10 line items in BidBuy. Those 10 items would not be deleted with a new item upload.