Getting Started in Oracle Procurement

Navigating to Oracle Procurement

1. Go to [https://blink.ucsd.edu/](https://blink.ucsd.edu/)
2. Scroll to the bottom of the page to find the Tools sections and select **Oracle Financials Cloud**

3. Select the blue button for Company Sign-on, and enter **either your AD or Business SSO login**
4. Select the **Procurement** icon and then the **Purchase Requisition** sub-icon
Defaulting Profile Information

1. On the Oracle Procurement Homepage, click the pencil icon next to your name

2. In the Edit Requisition Preferences dialog box, make the following updates:
   - For the Shipping and Delivery section, in Deliver-to Location, search for your building
   - Make sure to select the “Preferred” address that routes to 7835 Trade Street, Suite 100, San Diego, CA 92121

Ways to Shop

1. Using the search bar for readily available goods already listed in Oracle Procurement
2. Using the punchouts that will redirect you to the supplier’s site
3. Using Request Forms for items and/or services not listed in Oracle Procurement
Using Request Forms

First, obtain a quote from the vendor you are wishing to purchase from. If you cannot get a quote, please screenshot the vendor’s website of the item(s). Make sure it includes essential information like model numbers, serial numbers, prices, etc.

For ordering goods, use the Goods – One-Time Shipment Form. For ordering services, use the Services with Time-Based Rate Form. (We prefer these forms over the Goods – Multiple Shipments and Services with Fixed Price forms because these forms include an area where you can state the line item quantities. If the order is indeed for recurring shipments/services, then please state so clearly within the descriptions of the line items.)

Select one of the Request Forms depending on whether you are purchasing a good or service.

1. Fill out the form with information pertaining to the first line item of your quote
   - No need to add attachments to this form. You can do this during the checkout stage.
2. Add to cart
3. Fill out your room number and make sure your deliver-to address is correct
4. Fill out your billing information: Project, Task, Expenditure Type, Expenditure Org (Procurement)
5. Scroll back up to your line items and duplicate your line item

   Requisition Lines
   ![Click this icon to duplicate]

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Category Name</th>
<th>Quantity</th>
<th>UOM Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>BIC Soft Feel Retractable Ballpoint Pens, Fine Point, 0.8 mm, Black Barr...</td>
<td>Office Supplies</td>
<td>1</td>
<td>DZ</td>
</tr>
</tbody>
</table>

6. Edit the duplicated line item with information pertaining to the second line item of your quote

   Requisition Lines
   ![Click this icon to edit]

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Category Name</th>
<th>Quantity</th>
<th>UOM Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CQ1-Confocal Quantitative Image Cytometer *Laser Wavelengths- 405, 488, ...</td>
<td>Lab Equipment over ...</td>
<td>1</td>
<td>EA</td>
</tr>
</tbody>
</table>

   - This means adjusting the description, price, and supplier item #
7. For the billing information, make sure you edit the Expenditure Type accordingly if it should be classified different from the first line item
8. Repeat these steps for as many line items as your quote has

If your quote includes installation fees, you will need to include this as a separate line item. If your quote includes shipping fees, you do not need to create a separate line item for this. If the supplier comes back to you and demand that the shipping charge should be included, then you can submit a SNOW ticket to have a Buyer add this on.
Checking Out and Submitting the Requisition

- The top section is your basic information and list of line items

Add quote, supporting documents, notes, and SSPR Form

- For attachments:
  - Type- select Text to write notes and File to attach files.
  - Category- select To Supplier for the quote and To Buyer for all other supporting documents (notes, SSPR Form)
- The middle section is your delivery information

- The bottom section is your billing information

- Make sure to utilize the search feature when filling out each field.
  Helpful hint: within the search, try adjusting the Value filter of the Description to "Contains" instead of "Starts with" to encompass more search results

Select “Advanced” search filter

<table>
<thead>
<tr>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>452302</td>
<td>Drugs and Supplies Sold to Non-Patients</td>
</tr>
<tr>
<td>520150</td>
<td>Surgical Supplies General</td>
</tr>
<tr>
<td>520500</td>
<td>Medical Care Materials and Supplies</td>
</tr>
<tr>
<td>520502</td>
<td>COVID - 19 Supplies</td>
</tr>
<tr>
<td>522001</td>
<td>Food and Beverage Supplies</td>
</tr>
<tr>
<td>522201</td>
<td>Office Supplies</td>
</tr>
<tr>
<td>522203</td>
<td>Audio Visual Supplies</td>
</tr>
<tr>
<td>522401</td>
<td>Lab Supplies</td>
</tr>
<tr>
<td>522403</td>
<td>Marine Supplies</td>
</tr>
<tr>
<td>522404</td>
<td>Field Research Supplies</td>
</tr>
</tbody>
</table>
To split your funding,

- Click the **Split** icon
- Input **Project Number**, then Task Number, Expenditure Type, and Expenditure Org fields will be available to type in. Fill out per usual.
- Calculate either by percentage or amount.
- Repeat these steps for as many funds you are wanting to split the purchase by.
Editing Funding Information for Multiple Line Items

- You can use Shift+Click to highlight multiple line items and then edit the chart string for them all at once. After you've highlighted them, click the pencil "edit" icon. A pop-up will open in the screen.

Within the pop-up, scroll down to the Billing section of the pop-up. You will then be able to input the chart string that then copies to all of the highlighted items.

- Fill out the initial information just as you would fill out for a single line item.

- Then, scroll to the right to make sure four fields below are completed for it to successfully work! You can put the current date as the Budget Date.

- Keep in mind! All of the selected line items you are adjusting will be assigned the same Expenditure Type. So when selecting the line items, group them by Expenditure Types first before clicking edit.
Selecting Suppliers with Multiple Profiles/Addresses

1. Click the dropdown arrow at Supplier Site.
2. Select Search

3. Type in "PO" to pull up all PO address profiles.
4. Drag the Site Address column to the left to expand more of the text within the column. Select the address that corresponds to the quote you have.

![Search and Select: Supplier Site](image)

<table>
<thead>
<tr>
<th>Supplier Site</th>
<th>Site Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO ADDR 1</td>
<td>BD BIOSCIENCES, 2350 QUME DR, SAN JOSE, CA 95131</td>
</tr>
<tr>
<td>PO ADDR 2</td>
<td>BECTON DICKINSON AND COMPANY, 1 Becton Drive, FRANKLIN LAKES...</td>
</tr>
</tbody>
</table>
**Equipment Purchases**

For equipment above $5,000:

- If purchasing with a **Goods Request Form**, label the **Category Name** as **Lab Equipment over 5k (Inventorial)**

  ![Image of Goods Request Form]

  - **Category Name**: Lab Equipment over 5K (Inventorial)
  - **Requester**: Adjust the Requester to the PI’s name.
    - Make sure that **each line item** has the same requester name and Deliver-to Location!
  - When checking out:
    1. Label the Expenditure Type as **163003 – Inventorial Equipment**
    2. Scroll to the right, and check mark the **Research Equipment** box

  ![Image of Expenditure Type]

**High-Dollar Amount Purchases**

A Source Selection and Price Reasonableness (SSPR) form (PDF) is required for all orders ≥ $10,000 with federal funds, and ≥$100,000 with non-federal funds.

- A COA is identified as federally funded if the COA segment **fund type** matches any of these values:
  - 20000
  - 20400
  - 20700
Ordering with Fisher Scientific

For items not found in Oracle, either through search bar or punchout, you can request quotes from Fisher to be automatically uploaded into Oracle!

1. Request a quote from your Fisher Scientific representative
2. Ask that they directly upload the quote into Oracle
3. Go to Oracle and select the Fisher Scientific punchout
4. Within the punchout, click on Your Account at the top right
5. Select Quotes from the dropdown menu
6. Look for your Quote # and name
7. Add to cart and checkout
8. You will then be redirected to Oracle’s checkout page
Re-assigning a Cart to Someone Else

1. Go to the Purchase Requisitions homepage
2. Select the desired cart from the Recent Requisitions
3. On the top right corner, click the Actions dropdown menu
4. Select Re-assign
5. Search for the person you are re-assigning to
6. Check mark the box for “Send notification to this person”
Searching for Requisitions

There are two ways to look for Reqs:

1. Within the **Recent Requisitions** box
2. Using the **Manage Requisitions** link

- You will need to fill out at least 2 of the text boxes that have asterisks

- If you are looking up a PO# (starting with PUR), then enter that number in the **Order** text box
Viewing Req/PO Information

Checking the approval process/ who is next in line to approve the requisition:

- Click either of the Status hyperlinks.

- Scroll down to the bottom of the page where you will see the approval workflow chart. Checkmarks mean that approvals have been completed at that stage.

If it is at this stage, that means the FinU Fund Manager is reviewing the req.
### Viewing requisition/order details:

Columns in oracle are adjustable. Hover near one end of the column to then drag the column wider to view more information.

<table>
<thead>
<tr>
<th>Line</th>
<th>Item</th>
<th>Description</th>
<th>Category Name</th>
<th>Quantity</th>
<th>Price</th>
<th>UOM</th>
<th>Amount (USD)</th>
<th>Status</th>
<th>Order</th>
<th>Line Life Cycle</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>50-Wall Black and White Microplates, Polystyrene, Greiner Bio-One - 655096</td>
<td>Lab Su...</td>
<td>1</td>
<td>146.58</td>
<td>USD</td>
<td>146.58</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>10ULXLTIP RL FILST GRAD 960/PK, WARNING - California - Cancer and R...</td>
<td>Lab Su...</td>
<td>2</td>
<td>264.05</td>
<td>USD</td>
<td>528.10</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>Microcentrifuge Tubes, Polypropylene</td>
<td>Lab Eq...</td>
<td>1</td>
<td>82.75</td>
<td>USD</td>
<td>82.75</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Combitips Advanced® Positive Displacement Pipet Tips for Eppendorf® R...</td>
<td>Lab Su...</td>
<td>1</td>
<td>151.38</td>
<td>USD</td>
<td>151.38</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
</tr>
</tbody>
</table>

**Line 1: Details**

- **Requester**: Rekha Venkataram
- **Requested Delivery Date**: 09/18/2020
- **Deliver-to Location Type**: Internal
- **Deliver-to Location**: BiologyBldg-Preferred
- **Destination Type**: Expense
- **Supplier Item**: 82000-75X
- **Suggested Supplier**: VWR INTERNATIONAL, LLC
- **Agreement**: 6 (UCSD CAMPUS)
- **Agreement Line**: 22,702
- **Employees Vendor Relationship**
- **Disclosure**: 

**Supplier Item # = Vendor Catalogue #**
Change Orders for Adjusting or Cancelling POs

Submit Change Orders to:
- Adjust pricing or quantity of existing line items
- Adjust line item descriptions
- Cancel entire PO

What you can’t do:
- Adjust CCOA information (Project #, Task#, Expenditure Type)
- Add items

1. Go to the requisition page.
2. Review the line items. Make sure all line items belong to only one PUR#.
3. Click on the Actions dropdown menu.
4. Select Cancel (if wanting to cancel entire req/PO) or select Edit Order (if wanting to adjust pricing or quantity).
More Things to Keep in Mind!

- Always save your work. Marketplace used to autosave work but with Oracle, you will need to remember to manually save it (a button on the top right corner).
- Do not use your Browser’s back button. Instead, click the “done” or “home” buttons.
- Expense Types must be selected for each line item.
- Invoices for inventorial equipment totaling $5,000 and above will require requisitioner approval. Invoices totaling $10,000 and above will require requisitioner and financial unit approval.

More Training Resources!

- **Services & Support.** In the Find Answers section, you can view all of the Knowledge Base Articles (KBAs) across multiple departments. Most of them include step-by-step screenshots. If you have questions on something that's not listed, you can submit a **SNOW ticket**. In this area too, you can ask questions to various offices throughout campus.
- **Buying Goods & Services Youtube Playlist.** If you prefer video tutorials, here is a very recently updated list. Topics range from how to use request forms to creating change orders to checking requisition statuses.
- **Oracle Procurement FAQ Page.**