Getting Started in Oracle Procurement

Navigating to Oracle Procurement

1. Go to 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.

Determining the right form for you

For ordering **goods**, use either the:

1. **Goods- One-Time Shipment Form** for a straightforward order that will most likely be invoiced just once.
   - Examples: general lab and office supplies
   - *These POs will close automatically once the full quantity has been paid.
2. **Goods- Multiple Shipments Form** for an order that will have staggered delivery times and will need to be invoiced more than once.
   - Examples: scheduled deliveries of dry ice or gas; large equipment order including many different components; blanket POs that cover a certain dollar amount for multiple orders.
   - *These POs will close automatically once the full amount has been paid.

For ordering **services**, use either the:

1. **Services with Time-Based Rate Form** for a straightforward order that will most likely be invoiced just once.
   - Examples: publication of essay, one-time repair services
   - *These POs will close automatically once the full quantity has been paid.
2. **Services with Fixed Price Form** for an order that will have multiple occurrences of servicing and will need to be invoiced more than once.
   - Examples: recurring document shredding services, consultant services for a period of time (if this contract requires a signature, please use the Professional Services Requiring a Signature Form instead), software or cloud services for a period of time.
   - *These POs will close automatically once the full amount has been paid.

For **equipment maintenance service agreements**, use the Equipment Maintenance Service Agreement Form.

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

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[Image showing a table with a line item for BIC Soft Feel Retractable Ballpoint Pens, Fine Point, 0.8 mm, Black Barrel, with Category Name: Office Supplies, Quantity: 1, UOM: DZ, and a red circle highlighting the duplicate icon.]
6. Edit the duplicated line item with information pertaining to the second line item of your quote. 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 &quot;Laser Wavelengths- 405, 488, ... Lab Equipment over ...</td>
<td></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

<table>
<thead>
<tr>
<th>Line Items</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
</tr>
<tr>
<td>1</td>
</tr>
</tbody>
</table>

Total 21,166.82

- 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
• 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.

![Split icon]

2. Calculate either by percentage or amount.

<table>
<thead>
<tr>
<th>Project Number</th>
<th>Task Number</th>
<th>Expenditure Item Date</th>
<th>Expenditure Type</th>
<th>Expenditure Organization</th>
<th>Expenditure Account Nickname</th>
<th>Expenditure Account</th>
<th>Budget Date</th>
<th>Percentage</th>
<th>Quantity</th>
<th>Amount (USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1000682</td>
<td>1</td>
<td>07/25/2020</td>
<td>163003 - Inventorial Procurement and B</td>
<td>16110.13991.1900131.163003.440.000.0000</td>
<td>07/16/2020</td>
<td>80</td>
<td>0.8</td>
<td>8,000.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1000685</td>
<td>1</td>
<td>07/25/2020</td>
<td>163003 - Prouerm</td>
<td>16110.13991.1900131.522201.440.000.0000</td>
<td>09/01/2020</td>
<td>20</td>
<td>0.2</td>
<td>2,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Enter desired Project#. Then fill out all fields per usual.
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.
Equipment Purchases

For equipment above $5,000:

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

  - 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

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High-Dollar Amount Purchases

A Source Selection and Price Reasonableness (SSPR) form (**PDF**) is required for all orders \( \geq \$10,000 \) with federal funds, and \( \geq \$100,000 \) 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 a req has been approved, the PO# will show here.

If it is at this stage, that means the FinU Fund Manager is reviewing the req.
### Requisition Lines

<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>Funds 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 Supplies</td>
<td>1</td>
<td>146.58 USD</td>
<td>CS</td>
<td>146.58</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>100ULLIP R, FILST GRAD 960/PK, WARNING - California - Cancer and R...</td>
<td>Lab Supplies</td>
<td>2</td>
<td>264.05 USD</td>
<td>CS</td>
<td>528.10</td>
<td>Pend...</td>
<td>Not res...</td>
<td></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 USD</td>
<td>CS</td>
<td>82.75</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>Combipips Advanced® Positive Displacement Pipet Tips for Eppendorf® R...</td>
<td>Lab Supplies</td>
<td>1</td>
<td>151.38 USD</td>
<td>CS</td>
<td>151.38</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Rows Selected:** 1  
**Columns Hidden:** 13

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**Line 1: Details**

- **Requester:** Sandeep Venkataram
- **Requested Delivery Date:** 09/19/2020
- **Deliver-to Location Type:** Internal

**Supplier Information:**

- **Supplier Item #:** 82099-754
- **Vendor Catalogue #:**

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**Additional Notes:**

- Hover near one end of the column to then drag the column wider to view more information.
- Columns in oracle are adjustable.
Change Orders for Adjusting or Cancelling POs

Submit Change Orders to:
• Adjust pricing or quantity of existing line items
• Adjust line item descriptions
• Adjust CCOA information (Project #, Task#, Expenditure Type)
• Cancel entire PO

What you cannot do:
• 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.
- UC Learning Training Courses:
  - [Oracle: Buying and Paying for PO Requisitioners](#) (2hrs)
  - [Oracle: Buying and Paying for Financial Unit Approvers](#) (1hr 30mins)
- [Oracle Procurement FAQ Page](#).