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
Check the Blink page to see which form is most appropriate for your purchase.

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

6. Edit the duplicated line item with information pertaining to the second line item of your quote
   • 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
9. Once you’ve add all of your line items, review the entire cart (ship-to address, room number, requestor name, billing information).

If your quote includes installation fees, you will need to include this as a separate line item.
If your quote includes shipping fees that is not a significant dollar amount, 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

- 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

   ![Delivery Information]

   • Requester: Au, Kathleen
   • Requested Delivery Date: 07/14/2020
   • UN Number
   • Hazard Class
   • Deliver-to Location: Biology/Field Station-Preferred
   • Deliver-to Address: Biology Field Station Main Bld., 7835 Trade St. STE 100, San Diego, CA 92121, United States

   Double-check delivery address

• The bottom section is your billing information

   ![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

   ![Search Feature]

   Select “Advanced” search filter

   ![Search Results]

<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.

<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>Charge Account Nickname</th>
<th>Charge 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</td>
<td>- Inventorial Procurement and B</td>
<td>16110.13891.1900131;163003.440.000.0000;07/18/2020</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</td>
<td>- Procurement</td>
<td>16110.13891.1900131;52201.440.000.0000;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#s. Then fill out all fields per usual.

2. Calculate either by percentage or amount.
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)**
  
  ![Goods Request Form Image]

- 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

**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 means 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.

### 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>06-Well Black and White Microplates, Polystyrene, Greiner Bio-One - 655096</td>
<td>Lab Supplier</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>
<td></td>
</tr>
<tr>
<td>2</td>
<td>10UJx9L10 P/L FILST GRAD 960/PK, WARNING - California - Cancer and R...</td>
<td>Lab Supplier</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>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Microcentrifuge Tubes, Polypropylene</td>
<td>Lab Supplier</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>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Combipips Advanced® Positive Displacement Pipet Tips for Eppendorf® R...</td>
<td>Lab Supplier</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>
<td></td>
</tr>
</tbody>
</table>

**Rows Selected:** 1

**Columns Hidden:** 13

**Line 1: Details**

- **Supplier Item #:** [80200-754](#)
- **Vendor Catalogue #:** [6 UCSD CAMPUS](#)
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
- Change ship-to addresses

1. Go to the requisition page.
2. Review the line items. Make sure all line items belong to only one PUR#. (Jump to the latter half of the next page to see what to do when you have more than one PUR# created from your requisition.)

3. Click on the Actions dropdown menu.
4. Select Cancel (if wanting to cancel entire req/PO) or select Edit Order (if wanting to make adjustments).
5. Write a quick summary of the purpose of the Change Order in the description box.
6. Adjust the price or quantity of the line items.

7. Go to the top-right corner to Save. Repeat these steps for each line item that needs adjusting.
8. When complete, go to the top-right corner to Submit.

Adjusting line items with more than one PUR# listed
*We recommend submitting one requisition per supplier in order to avoid having multiple PO#s associated with requisitions. This keeps adjustments and cancellations simple. But if you did create a requisition with multiple suppliers, please see the below instructions.

1. Rather than Editing from the top-right Actions dropdown menu, determine the PO you want to adjust, select the specific line item, go to the Actions dropdown menu within the Requisition Lines section, and select Edit Order.

9. Go to the top-right corner to Save. Repeat these steps for each line item that needs adjusting.
10. When complete, go to the top-right corner to Submit.
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.**