Getting Started in Oracle Procurement

1. Go to https://blink.ucsd.edu/
2. In the Tools header section, find the Business Tools dropdown, 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

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Category Name</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 Bar...</td>
<td>Office Supplies</td>
<td>DZ</td>
</tr>
</tbody>
</table>

   Click this icon to duplicate

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

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Category Name</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</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
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, please refer to this Knowledge Base Article (KBA) for more information on how to address it.
Checking Out and Submitting the Requisition

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

**Example:**
- **Description:** TP’s First Initial, Last Name (General description)
- **Examples:** Richards Lab Supplies, CDmn Facility Equipment, UC Lab Chemicals

**Notes:**
- Room # can’t be defaulted, so remember to input.

**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)

**Requisition Lines**

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Additional Information Required</th>
<th>Category Name</th>
<th>Quantity</th>
<th>UOM Name</th>
<th>Price</th>
<th>Amount</th>
<th>Amount (USD)</th>
<th>Funds Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Temporary trailer</td>
<td>Facility Equipment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>21,168.2</td>
<td>21,168.2</td>
<td>Not reserved</td>
</tr>
</tbody>
</table>

**Total:** 21,168.2

**Rows Selected:** 1

**Column Hidden:** 7

- 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)

**Attachments**

- **Type:** Text, File
- **Category:** To Buyer, To Supplier
- **File Name or URL:** Note, Dept B Approved Split Funding Email.pdf, Profession Quote_B_Ashley.docx
- **Title:** Note, Dept B Approved Split Funding, Quote

**Deliver-to Location:** Biology Field Station - Preferred
**Deliver-to Address:** Biology Field Station Main Blvd, 7835 Trade St STE 100, SAN DIEGO, CA 92121, UNITED STATES

**Notes:**
- Double-check delivery address

**Additional Information:**
- **Requester:** Au, Kathleen
- **Requested Delivery Date:** 07/14/2020
- **UN Number:**
- **Hazard Class:**

**Edit Requisition:** REQ00000284

**Options:**
- Shop, Check Funds, Manage Approvals, View PDF, Save, Submit
- 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
  - 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 the 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:

- 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

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.

If a req has been approved, the PO# will show here.

- 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.

<table>
<thead>
<tr>
<th>Line</th>
<th>Item 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>35-Well Black and White Microplates, Polypropylene, Greiner Bio-One - 655996</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>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1DXLECTIP RL FIST GRAD 96/PK, WARNING - California - Cancer and R...</td>
<td>Lab Su...</td>
<td>2</td>
<td>294.05</td>
<td>USD</td>
<td>588.10</td>
<td>Pend...</td>
<td>Not res...</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</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>
<td></td>
</tr>
<tr>
<td>4</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>
<td></td>
</tr>
</tbody>
</table>

Line 1: Details

Requestor: Sandeep Venkataram
Requested Delivery Date: 09/13/2020
Deliver-to Location Type: Internal

Destination Type: Expense
Buyer: UC San Diego
Suggested Supplier: WWR INTERNATIONAL, LLC
Supplier Item: 82010-754
Agreement: 6 (UCSD CAMPUS)
Agreement Line: 29,702
Employee Vendor Relationship: 
Disclosure: 
EVRID Outcome: 

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
• Adjust POET information (Project #, Task#, Expenditure Type)
• Cancel entire PO

What you cannot do:
• Add items

We recommend submitting one requisition per supplier in order to avoid having multiple PO#s associated with requisitions. This keeps adjustments and cancellations simple.

Instructional Knowledge Base Articles (KBAs)
• How to Create a PO Change Order in Oracle Procurement
• How to Create a Change Order to Edit POET (Project, Task, Expenditure Type) Information
• How to Edit the Period of Performance on a Purchase Order
• How to Cancel a Purchase Order in Oracle Procurement

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.
• Oracle Procurement FAQ Page.
• UC Learning Training Courses:
  o Introduction to Oracle Procurement & Payables
  o Oracle: Buying and Paying for PO Requisitioners (2hrs)
  o Oracle: Buying and Paying for Financial Unit Approvers (1hr 30mins)