

Incoming New Lab Members

Business Systems SSO

- Follow these [step-by-step instructions](#). This login is required to access UC Learning.

Procurement Card

Please discuss with the PI to determine if a card is needed. If so,

1. Complete the UC Learning training course on the [University Procurement Card Program](#) (16 mins). Save a copy of the certificate to attach to the Concur card application.
2. Complete the [Procurement Card Cardholder Agreement](#).
3. Provide your signature.
4. For Supervisor signature, please have your PI sign it.
5. For DA name and email, fill out: Kathleen Au, k6au@ucsd.edu.
6. For MSO signature, please send the form to k6au@ucsd.edu, who will then route it to Maryam Attari for signature. Afterwards, the form will be sent back to you to attach to the Concur card application.
7. Submit an application via Concur: here is a step-by-step guide on [How to request a New Procurement Card](#).

Purchase Order System: Oracle Procurement

- Read the "Oracle Procurement Guide" PDF provided on our [Division of Biological Sciences website](#).
- UC Learning Training Courses:
 - [Introduction to Oracle Procurement & Payables](#) (prerequisite for below class)
 - [Oracle: Buying and Paying for PO Requisitioners](#)
- [Oracle Procurement FAQ Page](#).
- [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.

Alcohol/Ethanol Purchasing Authority

- If you need to purchase alcohol/ethanol for your lab, please have your PI send k6au@ucsd.edu an email requesting for your purchasing authority.

Departing Lab Members

Clean-up of Purchase Orders

- Any large dollar-amount, open POs must be reassigned to either another member of the lab or the PI
- Clear Oracle Procurement queue of all draft/incomplete requisitions

Closing of P-Card

- Cardholders must:
 - Ensure no lingering, recurring charges are still active on the card
 - Reconcile all remaining, pending expenses within Concur
 - Clear Concur queue of all draft expense reports
 - Submit a card cancellation request via Concur ([instructions](#)) and route it to Kathleen Au (k6au@ucsd.edu) for approval
 - Cut and dispose card