Oracle Procurement Q&A (8-9-23)

Tara L Pastucha <tara.pastucha@ucr.edu>
Thu 8/31/2023 11:47 AM

To:Tara L Pastucha <tara.pastucha@ucr.edu>

📎 1 attachments (20 KB)
Frequently Used Account Codes 7-14-23.xlsx;

Dear all,

On August 7, the Impact23 team changed the way COAs with Project Numbers (called POETAFs) must be entered in the billing section on order requisitions. Please see the announcement here: https://impact23.ucr.edu/announcement/2023/08/08/oracle-procurement-how-correctly-charge-project

This means that any POETAF saved in your preferences will no longer apply correctly to the billing section on any order requisition and will result in an automatic rejection. Multiple requesters emailed today about COA errors; please try the procedure below to see if this will correct the error messages you are receiving.

Moving forward, if you are charging an order to a POETAF, you will need to enter it manually on every line item on the order. To do so, enter the Project Number in this box in the billing section for each line item and hit **ENTER**:

Then **SAVE** your order requisition in the top-right to apply the change. Please double-check that the project number applied correctly; the Charge Account section should also populate with the correct POETAF.

Please reach out if you have any questions. Thank you!

Sincerely,
Tara Pastucha

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From: Tara L Pastucha <tara.pastucha@ucr.edu>
Sent: Tuesday, August 8, 2023 1:49 PM
To: Sergio M Maravilla <sergio.maravilla@ucr.edu>; Robin E Heathcoat <robin.heathcoat@ucr.edu>; Katrina L Preciado <katrina.preciado@ucr.edu>; Paige M Mejia <paige.mejia@ucr.edu>
Cc: Sherice P Underwood <sherice.underwood@ucr.edu>
Subject: Fw: Oracle Procurement Q&A 8-7-23

Dear all,

The team is continuing to see some common errors that the below tips and reminders will address. I've made some revisions to my prior emails (included below) and those are shown via dates in red, so please review those as well. **Finally, for those who were previously sub-requesters in eBuy, please see the following steps to add PI approval to your order request**:

1. **Please set your requisition preferences BEFORE you submit any orders**!
    a. This is important because these entries will automatically populate on any order you create.
    b. If preferences are not set first, y<u>ou will have to manually enter the **Receiver, Deliver-to, and COA information** ON EVERY LINE ITEM on your order</u>. Unlike eBuy, there is no "apply all" function in Oracle.
    c. Please see my prior emails (below) re: how to enter your delivery location, Receiver, and COA.
    d. If you have more than one COA, I recommend you save them all in your preferences so you can select them from a dropdown when you have to manually add COAs to each line item.
    e. You can also change your "primary" COA in preferences before you start a new order request so the one labeled "primary" will be automatically applied to your new order. All order requests default to the "primary" COA set in your preferences.
2. **Please choose a suggested Buyer from EMN (see below emails) and add that person as Buyer to ALL line items on your order** unless your order is over $10K. If over $10K, leave the suggested Buyer field blank.

3. **For requesters who need to obtain PI approval for their orders:**
   a. There is no sub-requestor role in Oracle like in eBuy (the sub-requester role automatically routed orders to the PI for approval). **In Oracle, <u>you have to manually add your PI's approval to EVERY order request you submit</u>**. Please see the following steps:
      i. On the Edit Requisition page, click the "Manage Approvals" button on the top right.
      ii. Select any of the dept. transactor names to highlight the entry
      iii. Hit the "+" button on the top left
      iv. The "Add Assignee" pop up box appears:
         1. Click the magnifying glass to open the User search box
         2. Enter your PI's name and hit search
         3. Click the radio button next to your PI's name and hit OK. Your PI should now show in the User textbox
         4. Click the "Start of Stage" radio button in the Position section
         5. hit OK
      v. Your PI's name should now display ahead of the departmental transactor routing section at the "Start of Stage"
   b. When you submit your order, your PI will receive an email notifying them there is an order request pending their approval. They can approve directly from the email or navigate to the Oracle main page and approve from the "Things to Finish" section.
   c. If you need additional guidance for adding PI approval, please open the Oracle: Requester training module in the UCR Learning Center website, go to "Lesson 9: Submitting Your Request," and watch the "Manage Approvals" video tutorial.

Thanks all!

Sincerely,
Tara Pastucha

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Dear all,

I've received reports that the deliver-to: address is glitchy and sometimes not saving the correct address -

- For some users, the orders will not populate with the address they set in their preferences
- Some orders that have been returned to the requester for correction revert to the "Central Receiving" address

Before submitting your request, please double-check your deliver-to address field to make sure that it is correct, and **please double-check ALL fields for discrepancies** and let me know if you find any other issues. I have reported this address issue so hopefully it will be resolved soon. Thanks all!

Sincerely,
Tara Pastucha

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Dear all,

Here are some common issues that popped up in the last couple of days; please review and let me know if you have any questions:

1. **Populating fields** - Please make sure to let all applicable entries POPULATE in the required fields before saving and exiting. You may need to actually select the option that pops up instead of trying to only type in the entry. Otherwise, the entries might not take. **(updated 7/18)**
2. **Setting Requester preferences** - please make sure you set your preferences BEFORE starting any orders. If this step is not completed first, you will have to manually enter the COA and shipping address for EACH item you are ordering. You can edit these preferences by hitting the pencil button next to your name in the upper right corner of the program after you select the "Purchase Requisitions" tile from the Oracle main page:
   a.
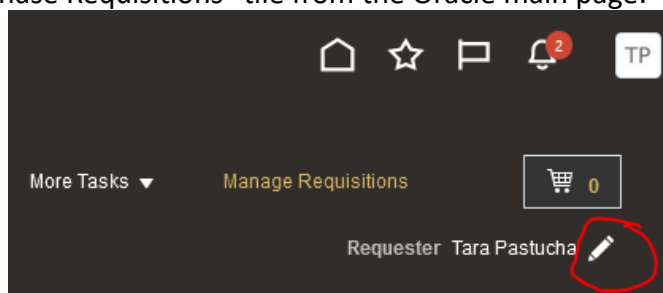
      b. There is a step-by-step walkthrough in the Oracle Requester Training module if you need additional guidance.

3. **General order entry** - please enter the following in each section at the TOP of the requisition (these information boxes apply to the ENTIRE order in the sections below it:

      a. **Description** - your order descriptor for all items on your request. It will default to the description of the first item you entered.

      b. **Eligible for reduced tax - choose "NO"** unless you are ordering inventorial equipment (valued at 5K+) that meets specific criteria. Please email the team if you think your item qualifies and we will advise.

      c. **Owning department** - choose from the following:
          i. D01046 - EEOB labs/faculty
          ii. D01051 - MCSB labs/faculty
          iii. D01049 - Natural Reserve System
          iv. D01307 - Stem Cell Center

      d. **End user** - this will be used as the "ship-to" name field, so please enter using the following format: **PI last name/end user last name** (ex. Talbot/Martinez) **(updated 7/18)**

      e. **Justification** - if you are requesting an item that can be perceived as a non-research/personal use purchase, please write a quick description re: how you will be using said item(s) in your research.

4. **Changing account codes on non-catalog order requisitions** - if you need to change the account code on an item, you MUST CHANGE the item's category name. The category name will override any account code changes you make to the COA if they don't match. To change the category name on an item, please see my previous email.

      a. Note: Punchout catalog items automatically have a category name applied, so you cannot edit category names or account codes for punchout orders.

5. **COA Continued - Interentity, Future1 and Future2 fields**

      a. Choose the default zero entries. These were added to Oracle for additional categorization if needed, but are not in use at this time. However, default zero entries are mandatory.

6. **Suggested Buyer** - please input one of the following names (search by last name). **(updated 7/28)**

      a. **For Punchout, Hosted Catalog and other NON-procard (NON-credit card) orders**:
          i. Maravilla, Sergio for **vendors A-G (excluding Airgas)**
          ii. Pastucha, Tara for **vendors H-P (including Airgas)**
          iii. Heathcoat, Robin for **vendors Q-Z**

      b. **For pro-card (credit card) orders:**
          i. Pastucha, Tara for **EEOB/EMN**
          ii. Heathcoat, Robin for **MCSB/Stem Cell**

      c. *For Punchout orders,* this must be done so someone on the team will receive the notification that your order was *implemented* (encumbered in eBuy terms), because these orders are automatically submitted to the vendor for processing once the financial analyst approves (See #7 below).

      d. *For Non-Catalog orders,* **this must be done so someone on the team will receive your order request in their PO queue for processing**. If you leave this blank and a Campus Buyer populates, your order will route to the Campus Buyer and they will reject your order with instructions to resubmit to your dept. transactor.

7. **Request Routing** - sharing this for informational purposes so you can understand (in general) the steps your order requests go through before the PO or procard orders go to the vendor for processing. **(updated 7/18)**

a. For **Punchout Catalog** orders: *Requester --> PI approval [if added manually] --> Transactor Review/Approval --> Financial Analyst Approval --> PO issued to Supplier*
    i. At the Transactor Review/Approval stage, we transactors are UNABLE to edit your orders. We can review the submission only. If changes need to be made, we will reject your request with comments stating what needs to be corrected.

b. For **Non-Catalog Requisitions < 10K for Goods** orders: *Requester --> PI approval [if added manually] --> Transactor Review/Approval --> Financial Analyst Approval --> Transactor for PO issuance/pcard processing --> PO Issued to Supplier/Pcard order processed*
    i. Oracle requires that all orders be approved by the financial analyst first, before the team can issue POs or process orders to pay via procard.
    ii. You will receive an email when the PO has actually been issued, and will be titled like the following: "*FYI: Document (Purchase Order) UCRP00000042 (Requisition UCRR00000232) Implemented*"

8. **Procard orders (Work in Progress)**
   a. Please use the **Non-Catalog Requisitions < 10K for Goods** request form to submit procard orders.
   b. Please search and select "**Pcard**" for the supplier field ONLY **(updated 7/18)**
       i. Put the vendor name in the description box at the top of the form
   c. Longer links cannot be input in Oracle; the character limit is 240. Sometimes vendors provide shorter links (see below option on Amazon.com):
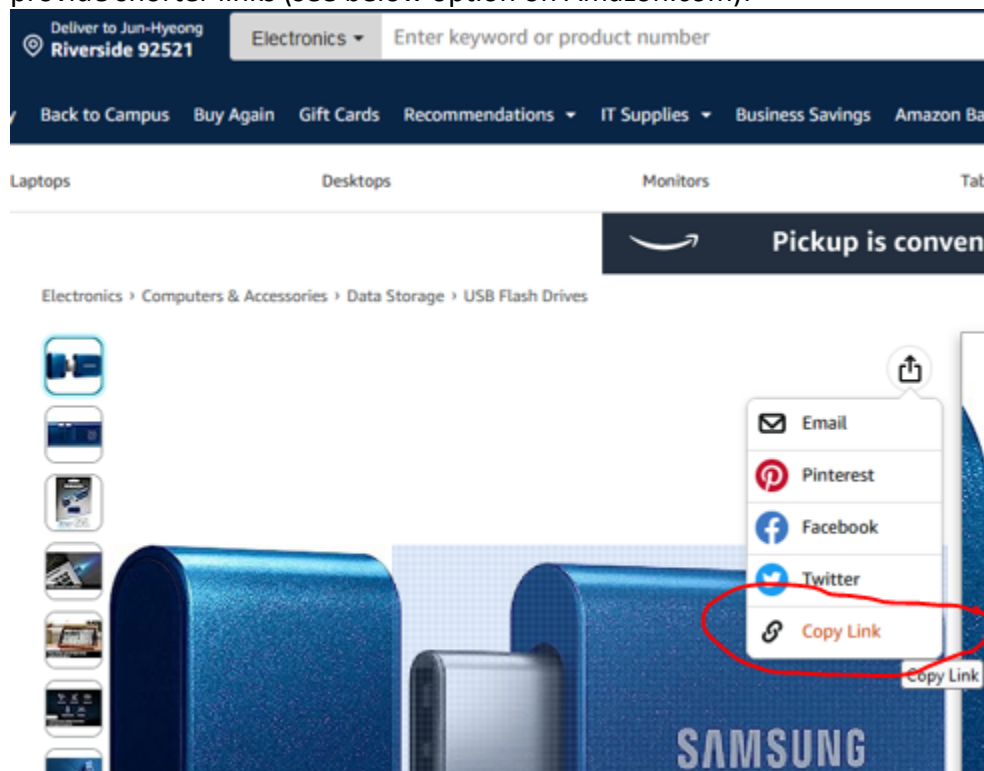
   d.
   e. Otherwise you can use a website like https://tinyurl.com/app to shorten the link for you.

Please reply all to this thread if you have any questions. Thanks much!

Sincerely,
Tara Pastucha

Procurement Analyst

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Dear Oracle Requesters,

The team and I understandably received a flurry of questions today regarding Oracle purchase requisitions. I'd like to share some common questions and answers we worked through today to help us all learn and transition to the new system.

When you have a new question, please reply-all to this email so we can respond and share with you all. I will be creating a FAQ based off the questions posed here and will revise regularly as we refine procedures and respond to new questions.

1. **COA Account Codes**
   a. The account code is used to classify the type of good or service purchased. There is no single entry you can use for all items; the account code that best fits each item being purchased must be applied. We converted an internal commonly used account code list and highlighted in yellow the ones we regularly see from labs for quick reference. Please see attached.
   b. For example, if you are purchasing copy paper, account# **541020** for paper products/stationery/copy paper must be applied to that item purchase. If you are purchasing a Bluetooth mouse, account# **546100** for computer supplies must be applied.
   c. NOTE: If you are submitting a Punchout Catalog (prev. eCatalog) order, the account code *and* category name for each item will automatically populate.
2. **Selecting Category Name when creating Non-Catalog Requisitions**
   a. Category Names and Account codes are linked.
   b. Click the search icon in the Category Name textbox, and hit the Advanced button in the top-right corner of the pop-up box.
   c. Change the Category Name search modifier from "Starts with" to "**Contains**"
   d. Find the account code for your item from the attached spreadsheet, enter that number in the Category Name field, and hit search.
   e. The correct Category Name will appear below the search section. Select the entry to highlight it and hit OK.
3. **Choosing the Deliver-to Location**
   a. In your Requisition Preferences, click search in the Deliver-to location box.
   b. Clear the name field, enter the appropriate code below in the Code textbox and hit search:
      i. **UCR0127** - EEOB/1229 Spieth
      ii. **UCR0126** - MCSB/1229 Spieth

             iii. **UCR0108** - 1415 Boyce
            iv. **UCR0060** - 1202A Genomics
           v. **UCR0101** - MRB

    c. The Deliver-to location will appear below the search section. Select the entry to highlight it and hit OK.

    d. The correct address will now show in your preferences. Finally, save and close.

4. **Choosing the Receiver**

    a. Please search and add one of the following people:

        i. **MCSB/NRS requesters - Li, Xinxia (updated 7/11)**

        ii. **EEOB/Stem Cell requesters - Preciado, Katrina (updated 7/11)**

Thanks again all for your patience and willingness to help as we work through these new processes together. As always, please reach out to the team when you have any questions and we will do our best to assist!

Sincerely,
Tara Pastucha

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