**UCD Pre-Purchasing System Instructions**

Prepurchasing.ucdavis.edu – you will log in with your kerberos ID.

Profile: In the Upper Right, Click on Profile. Make sure your information is correct and your email is entered. You can also choose what notifications you receive and the columns that shown on the screen.

Orders: To place an order click on Orders at the upper left, then Place Order. You can select Order History, to see all orders placed. Note this will show you the history for the entire department, if you want to only see your orders, click the red button under Your Orders to turn it to Yes and then hit apply on the right to refresh the list.

Placing an Order:

1. **Select Workgroup**: Choose from the list. Each Center has its own workgroup. You only see the workgroups you have been added to, so each person might have a different list. If the one you want is not there, email Lindsey Dunn lsdunn@ucdavis.edu or Gonzalo Barajas at gdbarajas@ucdavis.edu and they will add you to that workgroup.
2. **Justification**: Please enter a brief justification (ex. MARBLES Lab supply order, CARB Supplies for Riverside). If the item is for someone specific, please include the name of the person (ex. PPE for Jane Doe).
3. **Business Purpose**:
* Request Type: Choose Purchasing
* Business Purpose: Enter the account/billing ID/project name for the order....this is how we will identify what account to charge.
1. **Vendor**: Choose a vendor from the drop down menu...Aggie Buy vendors have been entered. If they are not in the drop down, you can click the search vendor to search through the KFS vendor table or hit Add new vendor to type it in. Note, you must do a separate request per vendor.
2. **Shipping Address**:
* Deliver To: Enter the person the order should go to
* Phone #: Optional
* Email: Optional
* Address: Please choose from the drop down menu. If the one you need is not there, please email Lindsey or Gonzalo to have it added.
1. **Line Items**: If you need to add more lines, click on the + Add New Line below the current lines.
* Quantity: Enter quantity
* Unit: Choose a unit that makes sense
* Catalog #: Enter if known
* Description: Enter a detailed description of the item; this will help to identify it when the order is being placed.
* Unit $: Enter the unit price. This is required by the system. If not known, you can give an estimate and add a comment that the price is only an estimate. If you are not sure of pricing for items we have ordered for years, you can check with Stephanie.
* More: Click the balloon icon to open the more fields
* Commodity Code: Do not need to fill out
* URL: you can include a link such as for Amazon...need to include http:// or it will not accept the link.
* Notes: Please enter the business need for this item (just like you did on the PO request form, ex. for filling out participant forms, for assessments, etc).
1. **Order Details**:
* Click on the Approver & Account Manager tab (Do NOT choose an account, even if you know it - please add account to the notes). Then select the appropriate approver from the drop down list (person who normally signs off on your PO request/has signing authority...usually the PI or study manager).

Account Manager’s

Gonzalo Barajas - CHE

Lindsey Dunn – JMIE, NRS

Sherri Gallagher - CHE

Debbie McGinnis – CWS

1. **Controlled Substances**: Leave blank.
2. **Order Preferences**:
* Date Needed: Choose the first of the month of the following month...so for example if you submit the request on 4/27/16, choose date needed as 5/1/16. If there is an actual date needed (this is pretty rare), please choose the date and add a note to explain the date needed.
* Shipping Type: You can leave standard unless you need a specific type.
* Comments and/or special instructions: Add any additional info necessary (this is where you should specify your account number if known).
* Add Attachments: You can attach quotes or back up if you have any. Reminder: a quote is needed for all service contracts and computer orders.

Once everything is filled in, you can hit create and it will create and route the request, and assign it a number. You can also hit Save For Later to save and come back to it.

The approver will receive an email that they have an order pending their approval. Once they have approved, it will route to the account manager for approval and then get assigned to a purchaser. Once assigned to the purchaser, the order will be marked complete and order will be placed as normal.

Packing Slips –

JMIE, CWS, NRS – Please forward your original packing slips to Norman Chen. If it is not convenient, you may scan and email the packing slip to norchen@ucdavis.edu

CHE - Packing slip procedure will remain the same i.e., handled at check in by the Business Office.