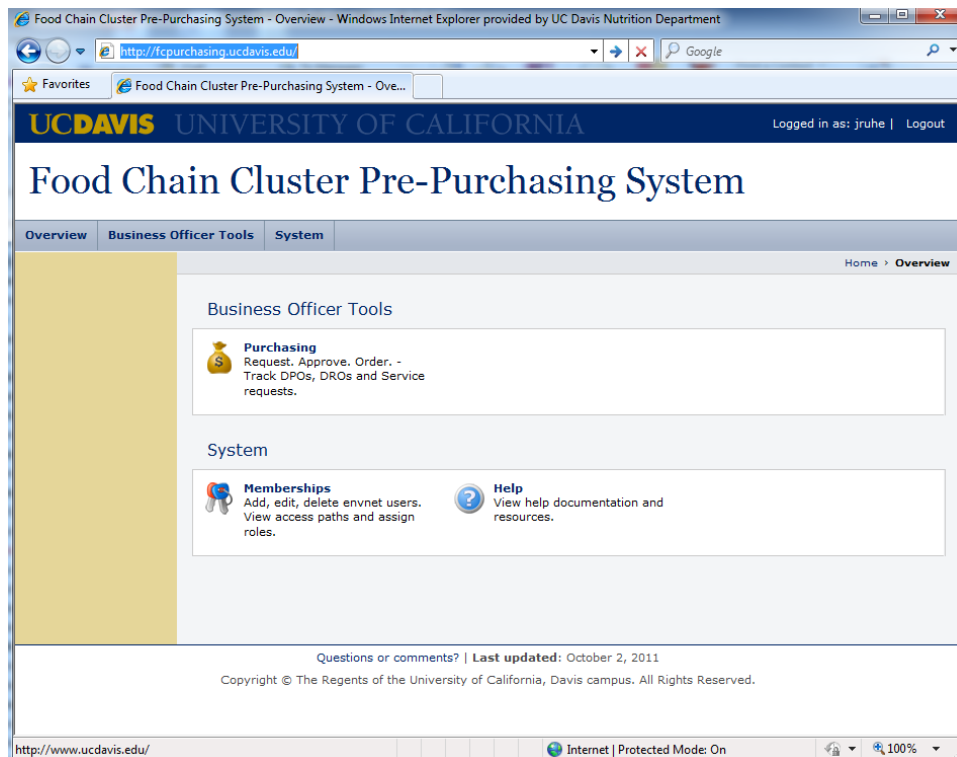


- I. Overview
- II. How to submit a purchase order
- III. How to mark a purchase order as received
- IV. How to approve an order (PIs only)
- V. How to mark an order as placed (Purchasers only)
- VI. How to add or modify a delegate (PIs only)
- VII. Special Steps for PCARD holders (Purchasing Card holders only)
- VIII. How to View Data Needed to Process FPDs for PCARD Transactions (Account Managers Only)

Website address: <http://fcpurchasing.ucdavis.edu/>



# I. Overview

The Food Chain Cluster Pre-Purchasing System provides an entirely Web-based process for submitting and approving purchase orders. What does moving to this system mean for you?

- You and your staff no longer have to handwrite and manually route paper forms for signature.
- You no longer have to turn in packing slips.
- Through the system you or your staff provide administrative staff with the details of your order (the same information that you are currently putting on the paper form).
- You will log into the system to give administrative staff approval for an item to be purchased – this serves in lieu of signing the paper form.
- After you have requested an item, you can receive an e-mail notification when the purchase has been made.
- You can log in at any time to check on the status of your orders.
- Once you receive the item, you will log in again to mark it received – this serves in lieu of the packing slip.
- You can template previous orders so you don't have to retype order or vendor information.
- You can also delegate people in your lab to authorize orders on your behalf, and specify how much you are allowing them to spend without getting your approval.

Below are instructions on basic tasks such as how to submit a purchase order, how to approve a purchase order, how to update order processing details, and how to indicate items have been received.

## II. How to Submit a Purchase Order

- **LOG IN:** Go to <http://fcpurchasing.ucdavis.edu/> and log in with your campus login ID (Kerberos). If you can log in, but don't see a way to place an order, please send an email to [jruhe@ucdavis.edu](mailto:jruhe@ucdavis.edu) and she will add your campus ID to the system. If you have a problem logging in, please close all web browsers, open web browser again, clear Internet cache, and try logging in again.
- **GO TO THE DEPARTMENTAL PURCHASE ORDER PAGE:** Click on the link to Purchasing. Next, on the "Place an Order" page click on the big shopping cart above "Purchase Orders & Requisitions."



## Enter your Order Information in the Departmental Purchase Order form:

- SELECT VENDOR:** Select a vendor from the pull-down menu or create a new one. Review the alphabetical list before you create a new vendor to avoid duplicates.
- SELECT DELIVERY LOCATION:** Your name will populate into the field for contact name (you may delete your name and enter a different "deliver to" name if appropriate). Select a location from the pull-down menu (note that both "Nutrition" and "Animal Science" locations will deliver to 2251 Meyer).
- ENTER LINE ITEMS:** Enter your items for purchase. Each field requires an entry. If you don't have a catalog number, you can enter "NA" or "0" but the application will halt later if you leave those fields blank. Tax is calculated automatically, though this is merely for your benefit (your purchasing agent will decide if your item is taxable later).
- SELECT YOUR PI/APPROVER:**
  - PI:** If you are a PI, select yourself for PI/Approver (you do not need to select an additional approver).
  - Everyone else** (those with or without delegated signature authority): Select your PI as your PI/Approver. If your order is authorized by the amount and/or account number restrictions of delegated signature authority assigned to you, it will be approved automatically without any action required by your PI. Otherwise, your order will route to your PI for approval prior to processing.
- SELECT A PURCHASER** – Each PI, facility, and some administrative groups are assigned a designated purchaser who also has a backup to process orders in their absence. Purchaser assignments can be found via the link to "[Don't know your purchaser? Click here.](#)"
- SELECT ACCOUNT** - The order needs an Account number. Find this before submitting the order. *If you submit with an imaginary account number, or a wrong account number, the Purchaser can reject the order.* You'll receive an email telling you the order has been rejected for a particular reason and you'll need to fix it for the Purchaser to accept the order.
- SELECT DATE NEEDED** (this field is optional)
- SELECT OPTIONS FOR OK TO BACKORDER, PERISHABLE, RADIOACTIVE, OR RUA (Radiation Use Authorization #).**

The screenshot shows the 'Departmental Purchase Order' form in the UC Davis system. The form is titled 'Departmental Purchase Order' and includes a warning: 'Orders not placed before 8AM will not guaranteed to be placed on the same day. By placing your order, you are abiding by the UC Davis Purchasing Policy 350-21'. It features several sections: 'Vendor' (with a search field and a 'New Vendor' link), 'Deliver To' (with a dropdown for location and a text field for contact name, currently 'Jennifer Ruhe'), 'Items' (a table with columns for Quantity, Unit, Catalog #, Complete Description, and Unit Price), 'Order Preferences' (with fields for PI/Approver, Purchaser, Shipping, Account, Date Needed, and checkboxes for OK to Backorder, Perishable, Radioactive/Controlled, and RUA), and a 'Special instructions' field. The estimated total is \$0.00. A 'Submit Order' button is at the bottom.

- **ENTER SPECIAL INSTRUCTIONS** – Enter any special instructions here such as what the order is for if the names of the items aren't clear; quote numbers; odd shipping or delivery information; request rush orders, etc.
- **UPLOAD QUOTE** - If you have a quote from the vendor, you may attach this document here. Click Browse to browse to your file. Click Add if you have more than one attachment.
- Click the **SUBMIT** button. If everything goes well, you'll see a page that tells you the PO has been successfully submitted.

**What happens next?** As your order makes its way through the system you will receive email updates keeping you informed of any progress on your order (approvals, orders processed, etc). After you receive your items you should log on to the system and mark the order as received (instructions on how to mark an order as received are below).

### III. How to Mark an Order As Received

- **LOG IN & NAVIGATE TO THE ORDER:** Go to <http://fcpurchasing.ucdavis.edu/> and log in with your campus login ID (Kerberos). Click on the link to Purchasing and then on the left hand menu click on the link to “My Orders.” Click on the link to “View” next to the order in question.
- **MARK ORDER AS PLACED:** Scroll to the bottom of the page where there is a section highlighted by a red outlined box. Click on the Submit button next to “I certify the item(s) ordered were received in good working condition and will be used for official University business.” If there are problems with the items received for the order that should be resolved before any invoices are paged, please select the last button indicating as such.

Order Receipt

UC Davis policy on the physical receipt of purchased items: The person physically receiving and verifying purchased items shall be someone other than the person who placed or approved the order. [Chapter 330, Financial Management and Services](#)

<input type="button" value="Submit"/>	I certify that the item(s) ordered were received in good working condition and will be used for official University business.
<input type="button" value="Submit"/>	I have not yet received the item(s)
<input type="button" value="Submit"/>	I have received the order, however there are problems that need to be resolved before paying the invoice.

**PACKING SLIPS:** You do not need to turn in your packing slip anymore (order receipt is now certified by this system). You should keep your packing slip until you are sure you do not need to return any items received.

**CERTIFICATION OF LINE ITEMS RECEIVED:** A limitation of this system is that for orders with multiple line items users cannot certify receipt of individual items (certification of receipt is for the entire order only). If you want to keep track of receipt of individual items, scroll to the bottom of the page and click on the link to Add Notes. You can then add notes to your order as items come in (“10 Widgets received 10/1/2011, 2 still on backorder”, “20 doo-dads received 10/3/2011”).

Add Notes

Please enter your notes below and click "submit".

10 widgets received 11/1/2011 (2 on backorder)

Attachments:

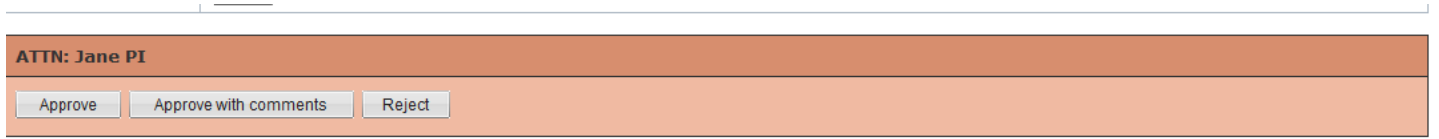
Notify purchaser of new notes.  
 Notify approver of new notes.

Order Notes [Add Notes](#)

Click 'Add Notes' to append notes and/or attachments to this order.

## IV. How to Approve an Order (PIs Only)

When an online purchase order is submitted for your approval, you will receive an email. Click the link in the email and it will take you directly to the purchase order view (after logging in with your campus credentials). At the bottom of the PO are your options:



- If everything looks good, click Approve.
- If everything looks good but you have a comment to make on the order (which will be seen by the next person in the workflow...the account manager or purchaser), click “Approve with comments.”
- If you do not approve, click Reject. You will be asked to input why you are rejecting the order. Please be very clear: "Wrong account number", "Qty is too much", "Don't want it", etc.

In some situations the email link does not work. In that case, just go directly to <http://fcpurchasing.ucdavis.edu/> and click on My Orders. You'll see a new purchase order there. Click View, review for approval, scroll to the bottom to select your approval option (approve, approve with comments, reject).

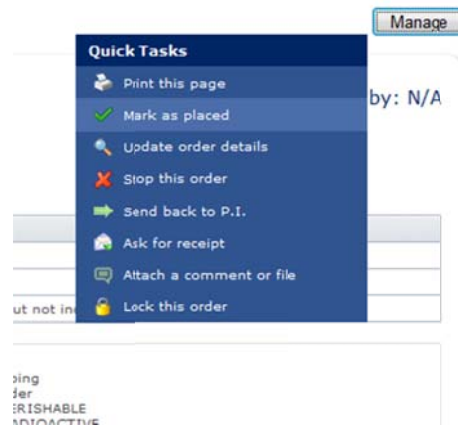
## V. How to Mark an Order as Placed (Purchasers Only)

- If you were selected as the purchaser on an order, you will receive an e-mail notifying you when an order is ready to be placed. You can click on the links in these e-mails to go directly to the purchase order page OR you can log in to the system at your convenience and navigate to your pending orders to be processed.
- **Log in:** Go to <http://fcpurchasing.ucdavis.edu/> and log in with your campus login ID (Kerberos).
- **Go to the Departmental Purchase Order page:** Click on the link to Business Officer Tools, Purchasing, Admin Home. Next, click on the Orders link under the title Manage on the left hand menu. Under View Orders By on the left hand side select All orders. Click on View next to an order that does not have a checkmark under the column for O-P (order purchased).

Orders (All Orders) Archive Selected Export To...

	Requester	Dafis PD	Dafis Doc	Confirmation Number	Account(s)	Order Totals	O-A	O-P	O-R
<a href="#">View</a>	jruhe				DEP2001	\$5.55		✓	
<a href="#">View</a>	nutrit				DEP1234	\$30.30			
<a href="#">View</a>	nutre	abc	abc	abc	DEP1234	\$20.20		✓	

- Click on the Manage button in the upper right of the order and go to “Mark as placed.”



- **Enter Order Details.** In the “Place Order” dialog box (shown below) you will enter in the actual total, DaFIS Doc Number, DaFIS PO Number, Vendor Confirmation Number, Message to requester, and you can check a box to Notify requester their order has been placed in X days and click on the “Place” button.

**Place Order**

Actual Total:	<input type="text"/>	(Include tax and shipping fees)
DaFIS Doc Number:	<input type="text"/>	
DaFIS PO Number:	<input type="text"/>	
Vendor Confirmation Number:	<input type="text"/>	
Message to the requester:	<input type="text" value="Your order has been placed."/>	
Send Follow-Up In:	<input type="text" value="5"/> <input type="text" value="Days"/>	Enter zero '0' to send immediately.
<input checked="" type="checkbox"/> Notify Requester that their order has been placed.		
<input type="button" value="Place"/> <input type="button" value="Cancel"/>		

Below is the naming convention for the DaFIS PO field for the different types of orders purchasers will enter in details for. This naming convention is intended to assist purchasing staff in querying the system on the “All Orders” page.

**UCD DPO/REQUISITIONS:** DPO-<UCD PO #>, <Vendor>, <OPPS#>

Examples:

DPO-3ANUT12345, StataCorp, 111011-2028                      DPO-UCD1202817,Agilent, 111011-3031

**PCARD ORDERS:** PCARD-<Card Holder Initials>, <Vendor>, <OPPS#>

Examples:

PCARD-JR, Dell, 111011-2049                                      PCARD-ET, Amazon.com, 111011-2051

**UCDBUY ORDERS:** UCDBUY-<UCDBUY order #>, <Vendor>, <OPPS#>

Examples:

UCDBUY-0000554515,OfficeMax, 111011-3021                      UCDBUY-0000554213,Dell, 111011-3022

**RECHARGE PURCHASE:** RECHARGE-<Purchaser Initials>, <Campus Vendor>, <OPPS#>

Examples:

RECHARGE-JR, MyUCDavis, OPPS#                                      RECHARGE-NA, UCD Bookstore, OPPS#

Tips/Notes:

- Replace anything inside < > with the actual data so, for example, if your initials are “PR”, you would replace <Purchaser Initials> with PR
- Unless additional text is required to differentiate it from another vendor, use a shortened vendor name (Use “Sable” instead of “Sable Systems International Inc”)
- OPPS# refers to the Online Pre-Purchasing System number that is auto-generated in the system and assigned to each order (you can copy/paste this from the purchase order page)
- You can put a space after each comma or not (no problem either way)
- Use the full UCDBuy order number including the zeros in the front

## VI. How to Add or Modify Delegates (PIs only)

If you're a PI for an account and have a member of your research group to whom you would like to grant signature authority, this will show you how. A delegate can create a Purchase Order and submit it to you and be automatically approved by you (without any need of your involvement) based on the rules and restrictions you set for them.

- **Log in:** Go to <http://fcpurchasing.ucdavis.edu/> and log in with your campus login ID (Kerberos). Click on the link to Business Officer Tools at the top. Next, on the link to “Delegates.”
- On the left side under Tasks, click Add Delegate.
- Use the drop-down box next to Automatically Approve to choose a delegate for an account.
- If the user is not listed there, please email [jruhe@ucdavis.edu](mailto:jruhe@ucdavis.edu).
- You can set the following optional rules for a particular delegate:
  - Can only delegate orders of a certain amount of money **AND/OR**
  - Narrow account names with text strings contained in account # (JSS, RBM, CLK, DEP, etc) **AND/OR**
  - Dates where the delegate is active
- Click **Add** to confirm the delegate.
- You can edit or remove delegates from the left hand menu.

## VII. Special Steps for PCARD Holders (Purchasing Card holders only)

PCARD holders must follow the established purchasing card policies and procedures (see [PPM 350-22](#)). In addition, when using the pre-purchasing system to track PCARD orders users will follow all the same procedures described in this document for initiators and purchasers except for two steps:

- 1) If you are the PCARD holder and initiator, then when you initiate your order you will **select yourself as your purchaser.**
- 2) Unlike other orders where this step is not required, you must **upload a PDF of your detailed order receipt/confirmation/invoice to the system.**

Details are below:

### STEP 1: ORDER INITIATION:

- If you are a PCARD holder who is a member of the Food Chain Cluster purchasing team, then skip to step 2.
- If you are PCARD holder who will be both initiating and processing your own orders, then when you initiate your order on the Purchase Order page select your approver as you normally would (if you are a PI, your approver is yourself, otherwise select the PI you work for as your approver and if you have delegated signature authority and your rules apply, your order will be automatically approved, or it will be routed to your PI/Approver).
- Next, **select yourself as your purchaser.**
- Fill in the rest of your PO the same as normal and submit.

- If your order auto-approved because you are a PI or because your delegated signature authority rules on file apply, then proceed to step 2 and process your order. Otherwise, wait until the selected PI approves your order before making the purchase (you will receive an email when approval is obtained)
- Once your order is approved go to step 2 and process your order (order the item with your PCARD and then follow the instructions below in step 2 for how to mark the order as placed and enter the order details into the system).

**STEP 2: ORDER PROCESSING:**

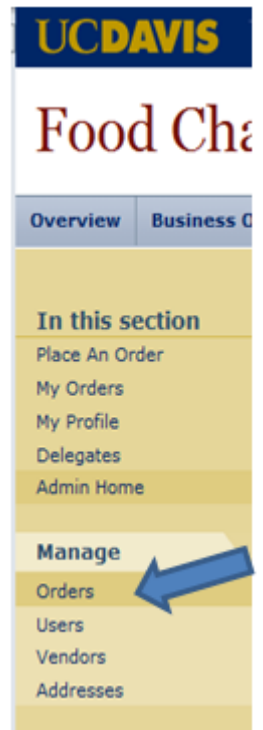
Once an order has all approvals in place, it is time to make the PCARD purchase, which you will record in the Pre-Purchasing System by following the instructions above in section V.

Be sure to use the naming convention for the DaFIS PO field as noted in section V.

The only extra step you will need to take is to **upload your order confirmation, receipt, or invoice with full order details as a PDF file.** The information about total charges, shipping/handling costs, and tax charged shown on the detailed confirmation, receipt, or invoice is necessary for tasks that must be completed by accounting staff at a later date. This is the document you receive from the vendor that confirms your order was placed and shows the exact shipping/handling and tax that were charged. This document may be a confirmation page on a web site or a confirmation email you print to PDF. It could also be something you receive in the mail at a later date if you did the order over the phone, or a paper receipt you obtained from an in-store purchase (these printouts will need to be scanned to PDF - please see your department’s IT support staff if you need assistance with scanning to PDF).

**To add a PDF confirmation, receipt, or invoice to an order**

- **Log in:** Go to <http://fcpurchasing.ucdavis.edu/> and log in with your campus login ID (Kerberos).
- **Navigate to your order:** To navigate to an order after it has been submitted just go to the Departmental Purchase Order page, Click on the link to Business Officer Tools, Purchasing, Admin Home. Next, click on the link to “Orders” under the heading “Manage” on the left hand side menu.



- **Attach the confirmation, invoice, receipt PDF file.** Click on the “Manage” button in the upper right and select “Attach a comment or file.” This will bring up a dialog box shown below. For comments type the word “Invoice” as a standard to describe the supporting documentation. Next, click on Browse and navigate to the PDF file containing the confirmation, invoice, or receipt. Click on Submit. You’re done!

**Attach comments & files**

Please enter your comments below.

Invoice









ers\juhe\Desktop\Invoice.pdf

Notify Requester

Notify Approver

**Manage**

**Quick Tasks**

-  Print this page
-  Mark as placed
-  Update order details
-  Stop this order
-  Send back to P.I.
-  Ask for receipt
-  Attach a comment or file
-  Unlock this order

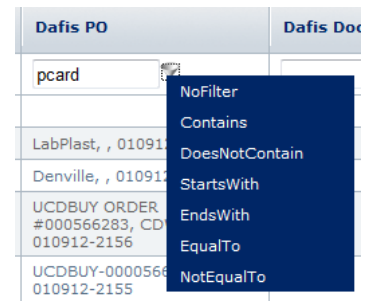
by: N/A

# IX. How to View Data Needed to Process FPDs for PCARD Transactions (Account Managers Only)

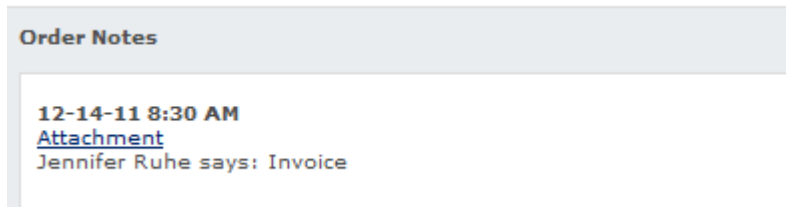
- Log on with your UCD computing account (Kerberos password) at <http://fcpurchasing.ucdavis.edu/>
- Select Business Officer Tools → Purchasing → Admin Home from the top menu.
- Click on the link to “All Orders” in the lower left hand side menu under the heading “View Orders by”



- **FIND PCARD ORDERS:** PCARD holders will be instructed to use a naming convention for the DaFIS PO field in the system, which makes it easier for you to find PCARD orders. Enter the word PCARD in the filter box under the word “Dafis PO” and click the filter icon and select “Contains” (this will display only orders that have been noted as PCARD). You can then further filter on “Requester” by entering the PCARD holders login ID in the Requester field and clicking on the filter icon and selecting “Contains” (remove filters by clicking on the filter icon next to a field and selecting “NoFilter”). You can then select the order in question by matching up information noted in the account, order total, and confirmation number columns. Click on the link to View next to the order in question.



- **CHECK CONFIRMATION/INVOICE DETAILS:** PCARD holders will be instructed to upload their order confirmation (aka “Invoice”) to their orders as an order note with an attachment that they note as “invoice”, which you can access via this order page. Scroll to the bottom and under “Order Notes” there should be a link to an attachment with the note “Invoice” (this will contain the vendor confirmation or “invoice” with the details of exact costs for shipping and tax).



- **CHECK APPROVAL:** On that same page, to determine if an order has obtained the proper approvals prior to processing by the PCARD holder look under Order details towards the middle right and under PI/Approvers there should be a green checkmark next to the PI name (the green checkmark indicates approval of the PI either by established delegate rules or routed manual approval).

**Order Details**

- Standard Shipping
- Do not backorder
- Item is NOT PERISHABLE
- Item is NOT RADIOACTIVE or CONTROLLED SUBSTANCE

- Account: RBMUCOP
- DaFIS Doc Number: n/a
- **DaFIS PO Number:** PCARD-JR, SHI, 120811-2083
- Vendor Confirmation Number: 2518708
- PI/Approvers:
- ✓ Roger Mcdonald

- **CHECK ORDER RECEIPT:** On that same page, to determine if an item has been received look in the “Order History” area. If an order has been marked as received, there will be a box icon and date/time with the text “Order Received” and the note “Marked as received by <name>”, which is the initiators way of indicating that all items on the order have been received. If there have been any problems with the order, this information should be reflected in the order history and/or notes as well.

Order History	
 12-12-11 2:47 PM: Order received	<b>Notes:</b> Marked as received by Jennifer Ruhe
 12-8-11 10:43 AM: Order placed	<b>Notes:</b> Jennifer Ruhe: Your order has been placed.
 12-8-11 10:42 AM: All approvals collected	
 12-8-11 10:42 AM: Order approved	<b>Notes:</b> Order approved by Roger Mcdonald
 12-8-11 10:27 AM: Order submitted by Jennifer Ruhe.	<b>Notes:</b> For Roger McDonald and Sandra Samarron (RBM Lab staff)

- **RECORD FPD DU# in Pre-Purchasing System order record:** When you process the FPD make a note of the DU# in the DaFIS PO field in the Online Pre-Purchasing System record for the order. This step is required so that orders are cross-referenced between the two systems. On the page for the order in question, click on the Manage button in the upper right and select “Update Order Details.” Enter in the FPD Number in the DaFIS Doc Number field and click on Submit.

**Update Order Details**

Actual Total:	<input type="text" value="\$98.50"/>	(Include tax and shipping fees)
DaFIS Doc Number:	<input type="text" value="FPD#DU0599247"/>	
DaFIS PO Number:	<input type="text" value="PCARD-JR, SHI, 121911-2"/>	
Vendor Confirmation Number:	<input type="text" value="2529300"/>	