COE Ordering Procedures

To place an order

Log on to: prepurchasing.ucdavis.edu

From here you can click on the tab that says “Request a new order” or under the “Orders” menu you can select ‘Place order’.

If you belong to multiple Workgroups, select the Workgroup that you want to place the order for.

*Justification: This is a required field. Enter a brief statement about what you are ordering and for what project (e.g., Coffee Maker for the Peet’s Coffee research project).

Business Purpose: These fields are not required.

Vendor: This is an optional field. You can select a vendor from a pre-populated list, search for vendors, or add new vendors. You can leave it as unspecified if you don’t know what vendor should be used. As you add vendors, they will be included in the drop down list the next time you place an order.

Shipping Address:

Deliver To is a required field. This is the name of the person who should be on the package as the deliver to name.

Phone # is optional.

Email is optional.

Address is required. Select a pre-populated address or add a new address. All campus deliveries will be made to the COE Receiving area at Bainer Hall and then delivered to the main office of your department. Be sure to include your department name in the address field. If you need the item delivered off-campus please add/select that address in this field.
**Line Items:**
Enter typical item information. Qty., Description, and Unit $ are required fields. You can add additional information per item. You can remove a line. You can add additional lines. You can split a line if you need to reflect multiple accounts being charged. You can also split the total order on multiple accounts in the Order Details section.

**Order Details:**
If you know the account to be charged, click on the “Select an Account” button. Then select the account (sub account and project are optional) You will only see the accounts that have been associated with that PI/Dept ORG.
If you don’t know the account, then click on the Approver & Account Manager button.
   The Approver is not needed (it will automatically route to the approver set up for the workgroup).
   Select “Any Workgroup Account Manager”.
Please note the account that should be charged (e.g., NSF Career or research/project name) in the comment/special instruction box at the bottom.

Split Order Request allows you to split the total cost of the order on multiple accounts. You can split it by percentage or by dollar amount.

**Controlled Substance:**
If the item(s) are controlled substances, slide the radial button to ‘Yes’. A drop down of questions pops up. Most of them are required fields (marked by a red asterisk)

**Order Preferences:**
Date Needed is a required field. Orders are typically placed in 1-3 days. However, if you want to ensure that an order is placed within 24 hours, you must provide a statement about why this is an emergency order (see guide below). This statement should be emailed to COE SS at coe-purch@ucdavis.edu.

**What is an Emergency?**
The university defines an emergency as meeting one or more of the following conditions:

- **Life threatening** situations for human and/or animal life.
- **Catastrophic events** such as, flood, fire, earthquake or other natural disasters that pose a threat to human and/or animal life, adversely affect the university mission, or threaten university property.
• **Critical equipment failure**, either on or off campus, that seriously increases the risk exposure of the university or may cause an extraordinary impact on funding.

• **Organized labor strikes**, of local, regional or national scope.

• **Weather conditions** affecting agriculture, human and animal shelter, and construction.

• **Public safety** incidents that seriously increase the risk exposure of the university or threaten life or property, such as riots, criminal acts, and terrorist actions.

**The following normally do not constitute an emergency:**

• Incentives such as, sales, discounts, short term promotions, price/quote expiration, provided by supplier for the purpose of meeting supplier sales quotas.

• Receipt of funding authorizing equipment and supply purchases.

• Unsupported need.

• Travel deadlines.

Shipping Type is to indicate shipping preferences only. It has nothing to do with how fast the order is processed at COE SS.

If the order is part of a **fabrication**, the fabrication details must be included in the comments section (you can enlarge the comment box by dragging at the bottom right corner) prior to the order being submitted or it can be added by others in the add a note section once the order is submitted. Information required includes the Asset #/Fabrication #, Custodial Code, Building, and room number.

There is the ability to upload attachments if needed.

Once the order screen is complete, click “Create”. You can save it for later or cancel the order as well.

The order will route to the Approver, Account Manager, and then to the Shared Service unit for ordering.

You can track the order from the ‘View order history’ tab on the home page.
Receiving:
When you receive your item(s), be sure to come back to prepurchasing.ucdavis.edu and:

1) Click on your order from the ‘View order history’ screen
2) Select the blue “Receive Items” box in the middle of the order under Line Items.
3) Select the blue “Receive All” button or enter the number of items received if partial, then click the blue ‘Record Items’ button.
4) Add any note you may want to add (optional)

Duplicate Order Option: If you open a previous order there is a blue ‘Duplicate’ button in the top right corner of the order. You can click on this button to duplicate the previous order to process a new and similar order.