Hello and welcome to our Oracle Procurement Video Guide series. This video on checking out will cover checking out with an active or inactive cart, providing required information during checkout, and splitting funds on an order.

If you started a cart but never submitted it, and it's not showing in your active cart, you can find it in manage requisitions. Once on the manage requisitions screen, you can filter for the incomplete status and click on the cart you'd like to finish. Click the Actions menu at the top right of the cart, then click Edit to begin the checkout process.

You can edit your active shopping cart just by clicking on the shopping cart icon at the top right of the Oracle Procurement homepage and clicking review.

The fields at the top of the form apply to the entire order and only need to be edited once.

- The cart description will default to the description of the first line item. You may change the cart description to anything which will most easily help you refer to this purchase in the future.
- Populate the room number field with the room number these items should be delivered to.
- You can add comments or attachments by clicking the plus sign next to the Attachments section. Add a comment instead of a file by changing the attachment type to Text. Use the To Supplier category to make your comment or attachment visible externally, or use the Miscellaneous category to make it visible only to UC San Diego. Internal attachments may be added to any order, but external attachments should only be added to orders placed with request forms.

Everything below this point is line specific and will need to be edited individually for each line on the order. For example, since we currently have line one selected indicated by the blue highlight, anything we change from here on will only apply to the first line and not lines two through four.

- Duplicate the line to create a new line in the shopping cart with similar information. If you duplicate a line, note that your default charge account, project and deliver-to information will be automatically populated in the duplicate line.
- Edit can be used to re-open a request form and apply edits to the top half, while the additional information icon may be used to apply edits to the bottom half of the request form.
- Delete will remove the item from the shopping cart.
- The deliver-to location can be edited, as long as you remember to do so on each line.
- The requester can be edited to a different UC San Diego employee to change the name on the deliver-to address. Please note that editing the requester will also change who is responsible for approving invoices in the case of invoices that are over $10,000 or that correspond to inventorial equipment.
- An employee vendor relationship can be disclosed here, but this checkbox should only be used when a potentially conflicting relationship exists between the supplier and UC San Diego. More information on these relationships can be found on Blink.

If you are not using a project, then you can select from your default charge accounts or enter a new one in the charge account field.

If you are using a project, you can enter the project without needing to also enter the charge account as the project will always pull in its default charge account.

- To use a charge account other than what the project defaults, you will either need to use a different project or change the charge account defaulted on the project
- When using a project, you will need to also populate the expenditure and task fields, and the contract number and funding source if you are using a sponsored project.
    - Your fund manager can help you with the task, expenditure item date, contract number, and funding source if you are unsure what to populate.
    - In the expenditure type field, you can search by keywords by clicking the arrow next to the field and then clicking Search. From there, switch to an Advanced search and change the Value dropdown to Contains. Try different keywords to find what you're looking for, selecting the one you want and clicking OK once you've found an appropriate one. You can also refer to the published Knowledge Base Article in Services & Support for a list of all expenditure types.
    - The expenditure organization field should be Procurement and Business Contracts for all purchases, unless you are purchasing with a UC San Diego department through recharge. In the latter case, you should select recharge as the expenditure organization.

If you are using a project, then the expenditure type you choose will override the account value in your charge account. If you are not using a project, then the purchasing category used on your order will default the account value in your charge account according to the Purchasing Categories Blink page.

Split among multiple charge account by clicking the diverging arrows icon. On each distribution line, indicate the percentage of the selected line which should be charged to the indicated charge account or project.

To the right of the charge account and project fields are additional fields which may be required depending on the purchase you are making.

Refer to our Knowledge Base Article for information on how to edit the Billing information for multiple lines at a time.

Once you're finished editing, there are several actions you can take with the cart at the top.

- Click shop to return to the Oracle Procurement homepage and continue adding items to this shopping cart
- Click Save and Close to set this cart aside for later and start a new shopping cart
    - You can access this cart later from the manage requisitions menu, and either continue editing or reassign it to a different individual
- Click submit to begin the requisition approval process. The number at the top left of the page will become your requisition number.

Please note that only one requester and deliver-to address should be used per requisition.

Thank you for taking the time to watch our video guide – we hope this information has been helpful. If you have any further questions, please reach out to us by submitting a case through Services & Support or by calling us at 858.534.9494.