

Hello and welcome to our Oracle Procurement Video Guide series. This video on request forms will cover uses of each request form on Oracle Procurement and criteria by which each form will close.

Request forms are used in Oracle Procurement to purchase items not found in the catalog or punchouts. More information on ordering from the catalog and punchouts can be found in the Introduction to Oracle Procurement video guide. In addition, an overview of all request forms including definitions, examples of when to use each one, and criteria by which each form will close [can be found on Blink](#).

Request Forms can be accessed on Oracle Procurement by going to ofc.ucsd.edu and clicking on the **Company Single Sign-On** button. From there, log in with your Active Directory information. Then, click on **Procure to Pay**, and then **Purchase Requisitions**. On the Oracle Procurement homepage, you will see the Request Forms section.

For all request forms, it is important to keep in mind the following:

- Shipping should not be added as a line item in your requisition. Instead, you can reference shipping as a comment on your order.
- Purchasing categories are very important both for taxability and for routing. Please refer to our [list of purchasing categories](#) as selecting the wrong one may result in your order being rejected or delayed, or in tax being incorrectly applied.
- Forms which are defined by quantity will always have a line type of Goods whereas those defined by amount will always have a line type of Services. The line type has no bearing on whether the form is actually used for goods or services.

The two primary request forms you will use are the Amount-Based request form and the Quantity-Based request form. Both of these forms can be used for either goods or services.

When using the Quantity-Based request form, the PO generated will close when the full quantity has been invoiced. It is important to be on the same page with your supplier about how often this order will be invoiced. If you set up your PO with a quantity of one, then after one invoice, the PO will close. Please clearly itemize your order so that the first invoice does not close the entire PO. Since amount is irrelevant for quantity-based POs, it is not necessary to submit change orders to correct line amounts.

When using the Amount-Based request form, the PO generated will close when the full amount has been invoiced. Your order does not have a quantity associated at all. Please make sure to put the full dollar amount of what you're ordering in the Amount field of the form. For example, if you're ordering four units of something, put the price of all four units in the amount field and not just the price of one unit. You are welcome to group line items together when using the Amount-Based request form, but do not combine taxable and non-taxable lines.

Outside of the two primary forms, there are also specialty forms available.

- The **Specialty Gas and Hardware** form should be used if the gas mixture or hardware being ordered is not in the search results or when refilling a cylinder owned by the department. Purchase Orders created from this form will close when the full quantity has been invoiced.
- The **Equipment Maintenance Service Agreement** form should be used for preventative maintenance and service agreements over 1-2 years in relation to equipment.

- The **Maintenance Services & Construction** form should only be used by Facilities Management and will be automatically rejected if used by any other department.

Purchase orders created from these last forms will close when the full amount has been invoiced, similar to the Amount-Based request form, whereas the Specialty Gas and Hardware form will close when the full quantity has been received.

Thank you for taking the time to watch our video guide – we hope this information has been helpful. All links are referenced in the video script and description. If you have any further questions, please reach out to us by submitting a case via [Services & Support](#) or by calling us at 858.534.9494.