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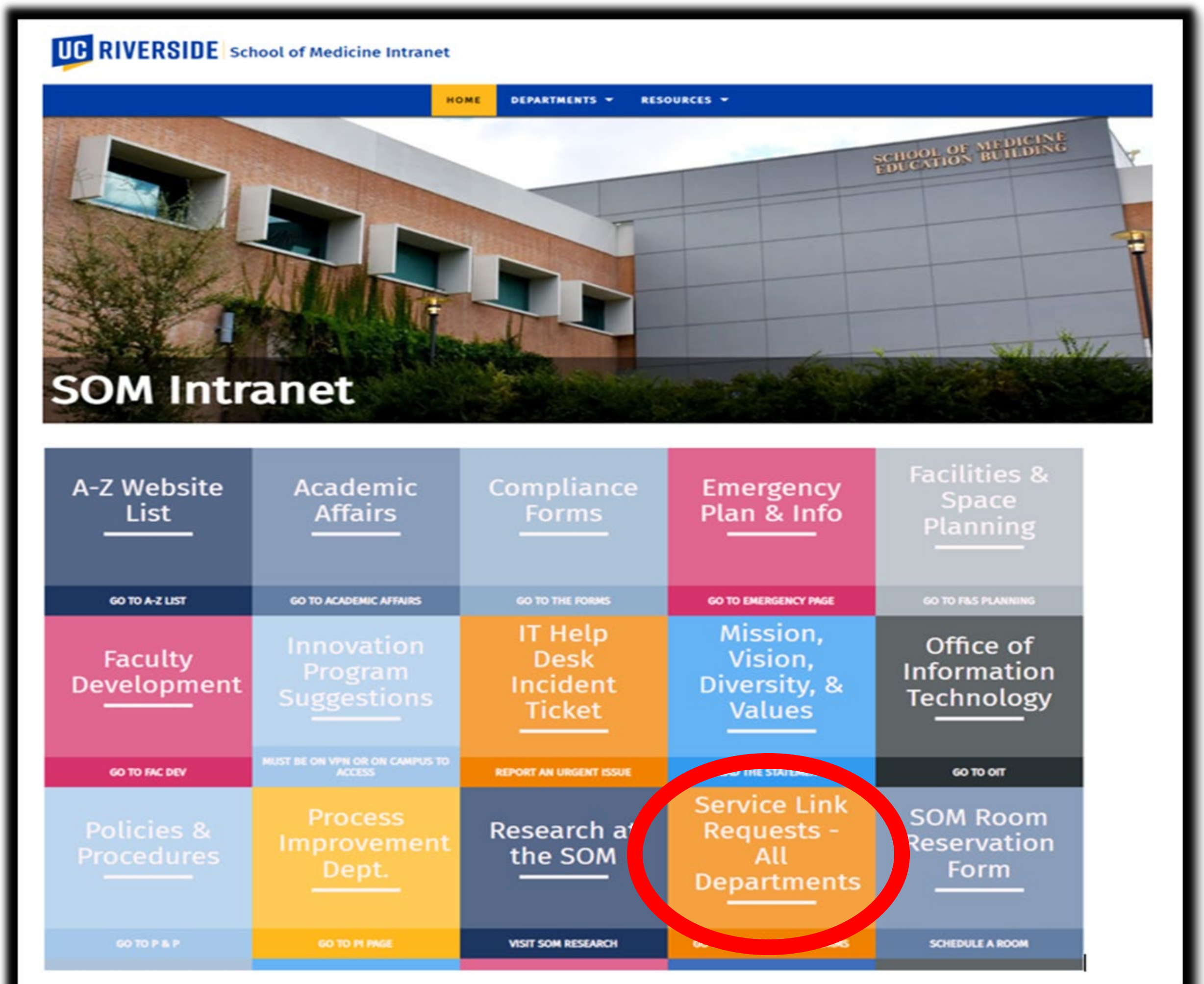
SOM Business Operations Procurement Commodity Request Form Process

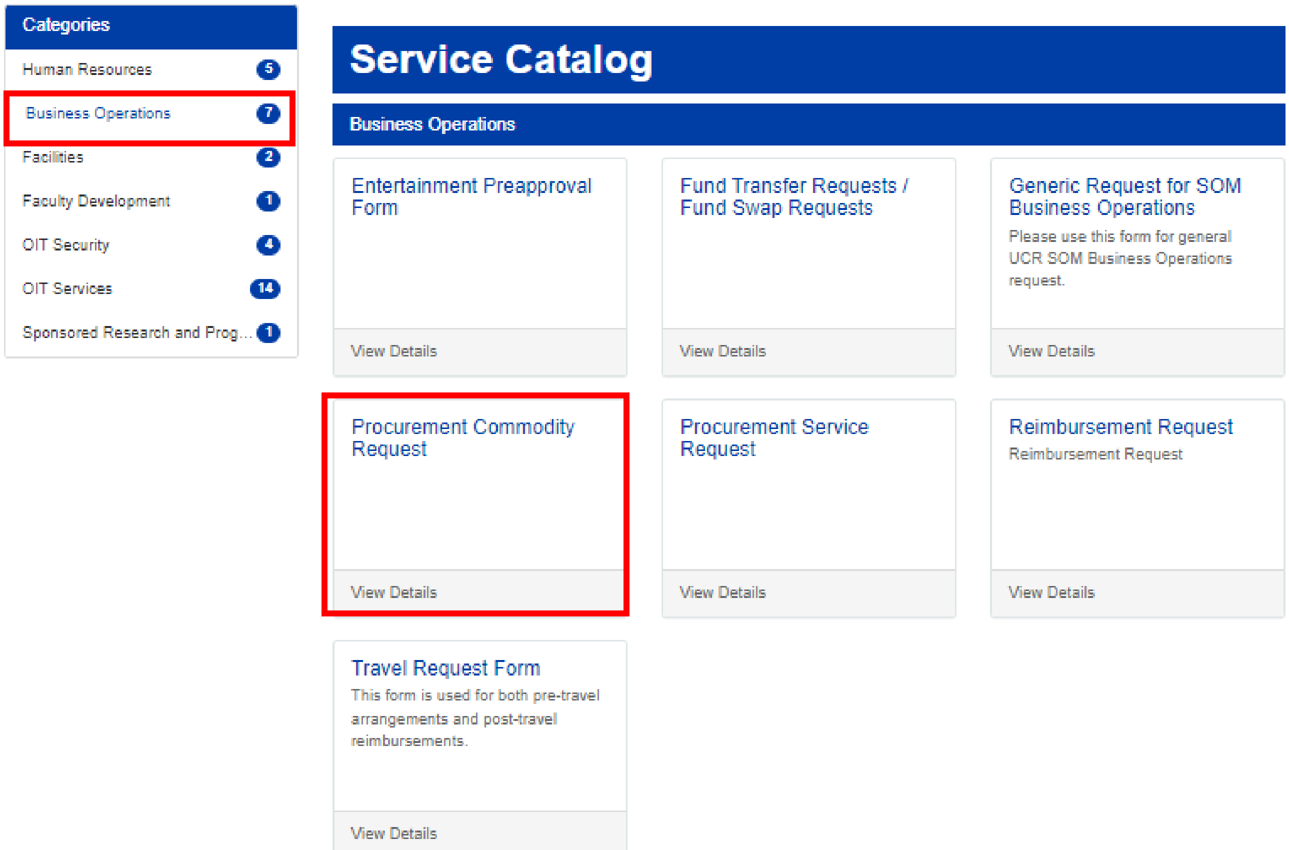
Purpose: The purpose of this document is to outline the process for entering a Procurement Commodity request using the ServiceLink form. This process applies to but is not limited to requests such as supply orders, memberships/ subscriptions or any tangible items, this form is not to be used for professional services. Professional Services are requested via the Procurement Service Request Form.

Entering a request

1. On the SOM Intranet Homepage https://medschoolintranet.ucr.edu/ select "ServiceLink Requests- All Departments"



2. In the Categories list, select “Business Operations.” In the Service Catalog section select “Procurement Commodity Request.”



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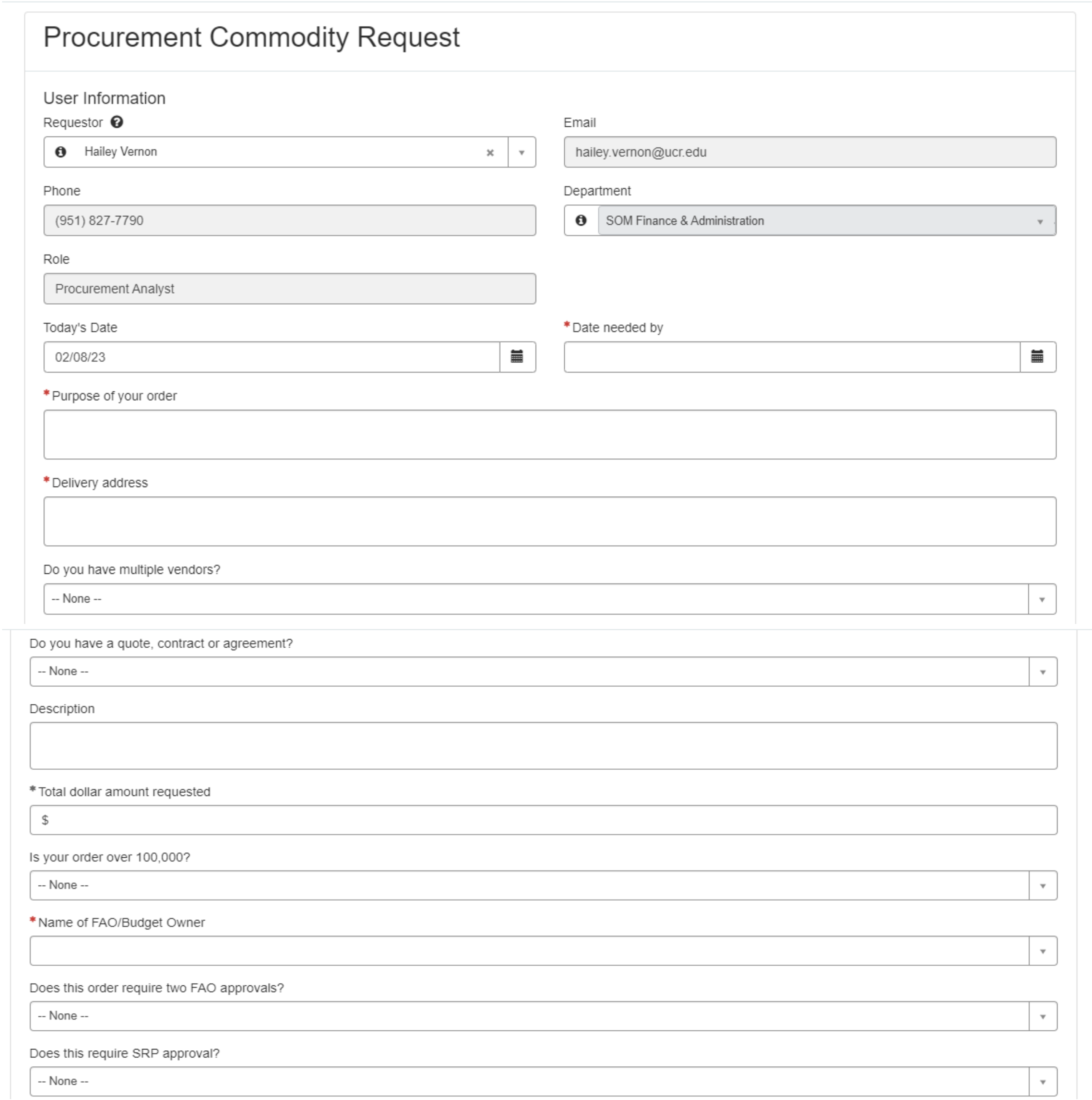
3. Complete the form.
   a. The requestor details will auto populate.
   b. Enter all missing information in text boxes and drop-down lists (i.e. date needed by, full description of business purpose, complete delivery address, any additional details, etc.).



Procurement Commodity Request

User Information

Requestor: Hailey Vernon

Email: hailey.vernon@ucr.edu

Phone: (951) 827-7790

Department: SOM Finance & Administration

Role: Procurement Analyst

Today's Date: 02/08/23

*Date needed by

*Purpose of your order

*Delivery address

Do you have multiple vendors? -- None --

Do you have a quote, contract or agreement? -- None --

Description

*Total dollar amount requested: $

Is your order over 100,000? -- None --

*Name of FAO/Budget Owner

Does this order require two FAO approvals? -- None --

Does this require SRP approval? -- None --

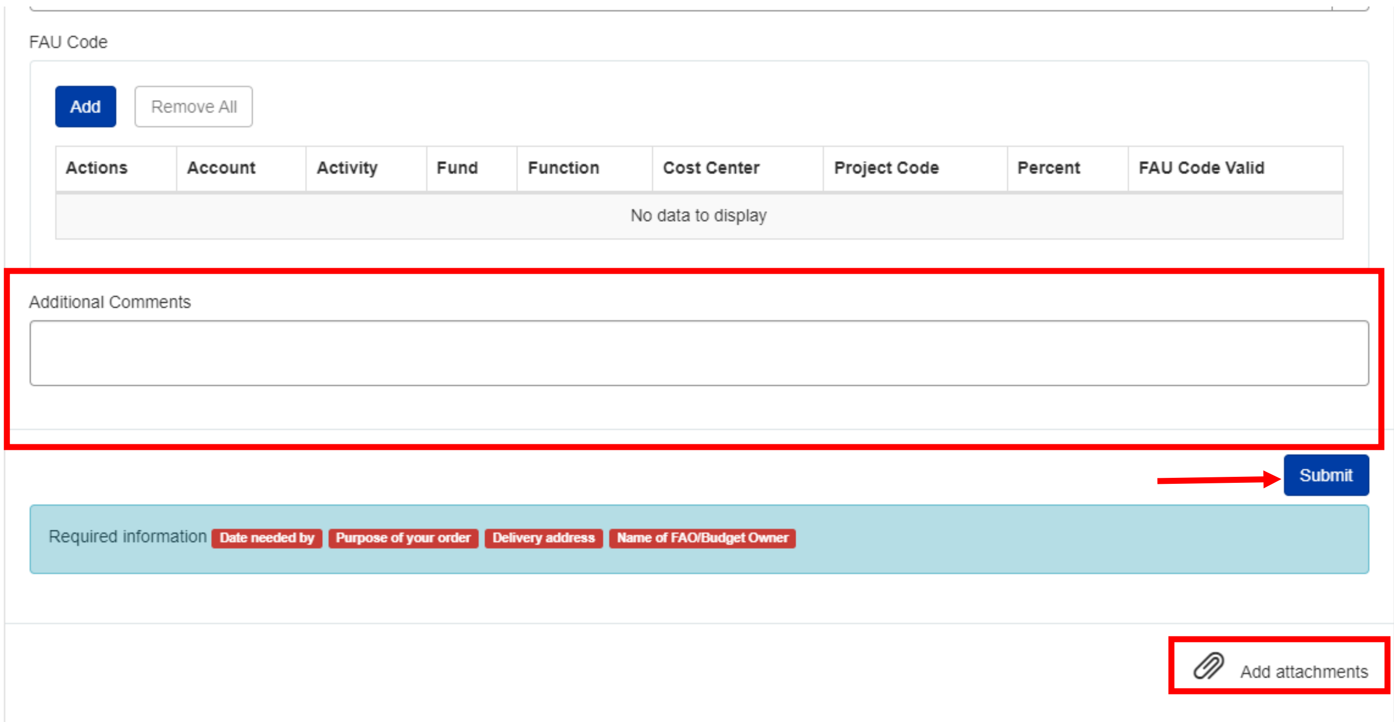
c. Enter the full FAU.

d. If any request requires someone to be notified, instructions for adding names to the watchlist is detailed in the next section of this user guide.

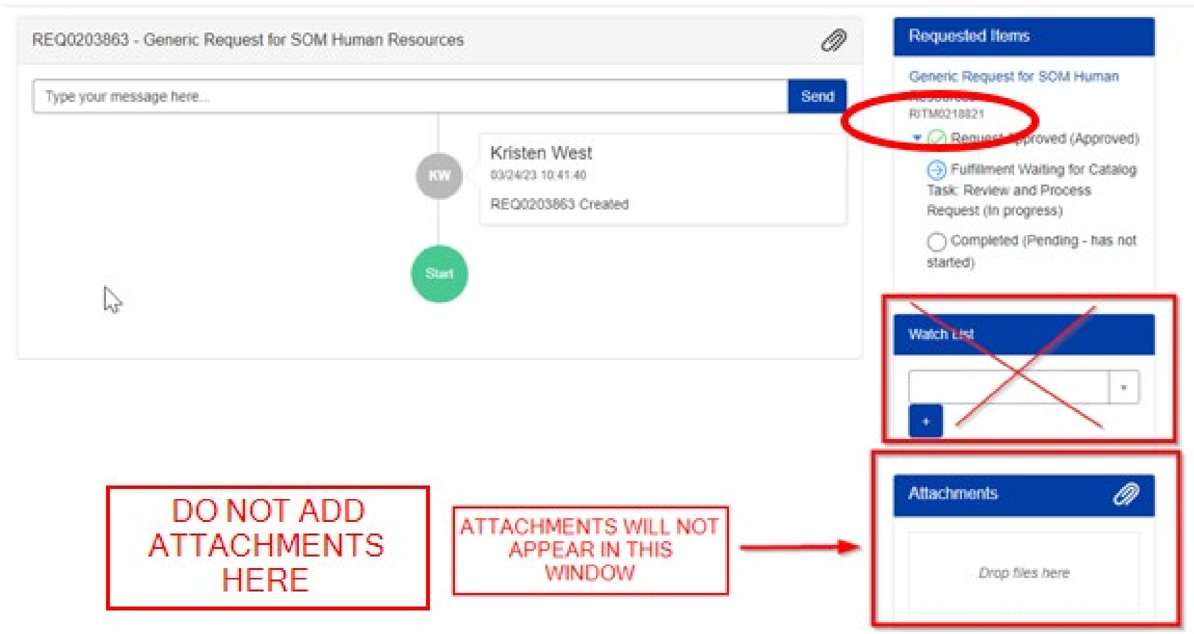
e. State in the comment box if this request is for one PO or multiple PO's.

f. Add any applicable attachments for your request (i.e. quotes or FAU approvals).

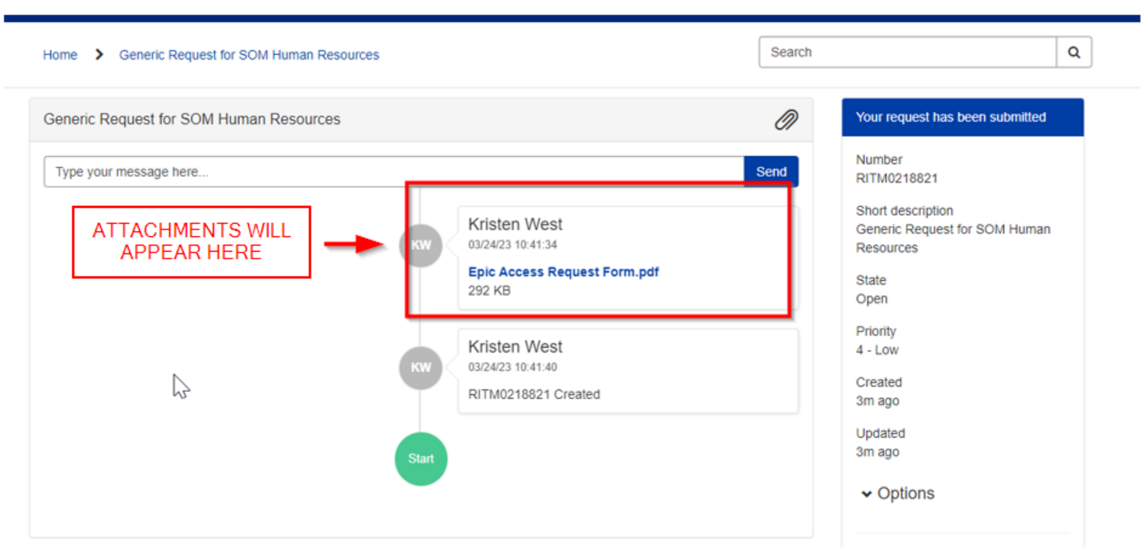
g. Once complete, select submit.



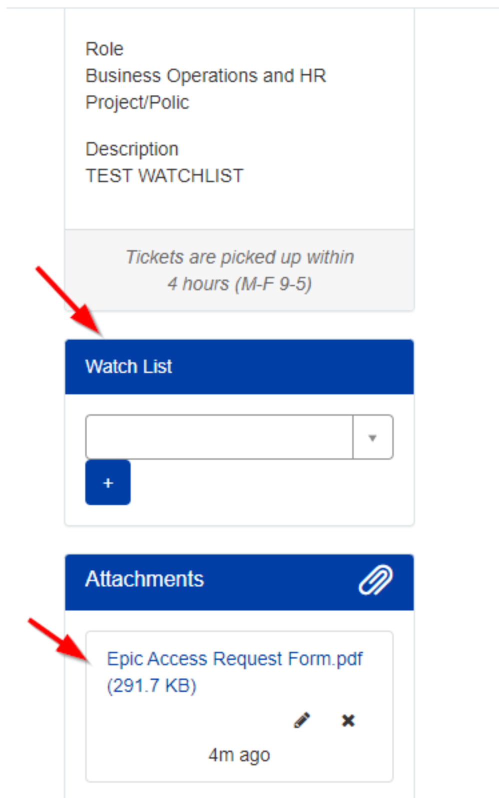
4. After submission the following screen will provide you with the RITM number that was created for the Business Operations Team to review. Note: Do not add someone to the watchlist from this screen. Also, your attachments may not appear from this screen. Click on the RITM number (circled in red below) and this will take you to a new screen.



5. After clicking on the RITM number, the screen pictured below will appear. In this screen the attachments should appear, and additional staff may be added to the watchlist by scrolling down.

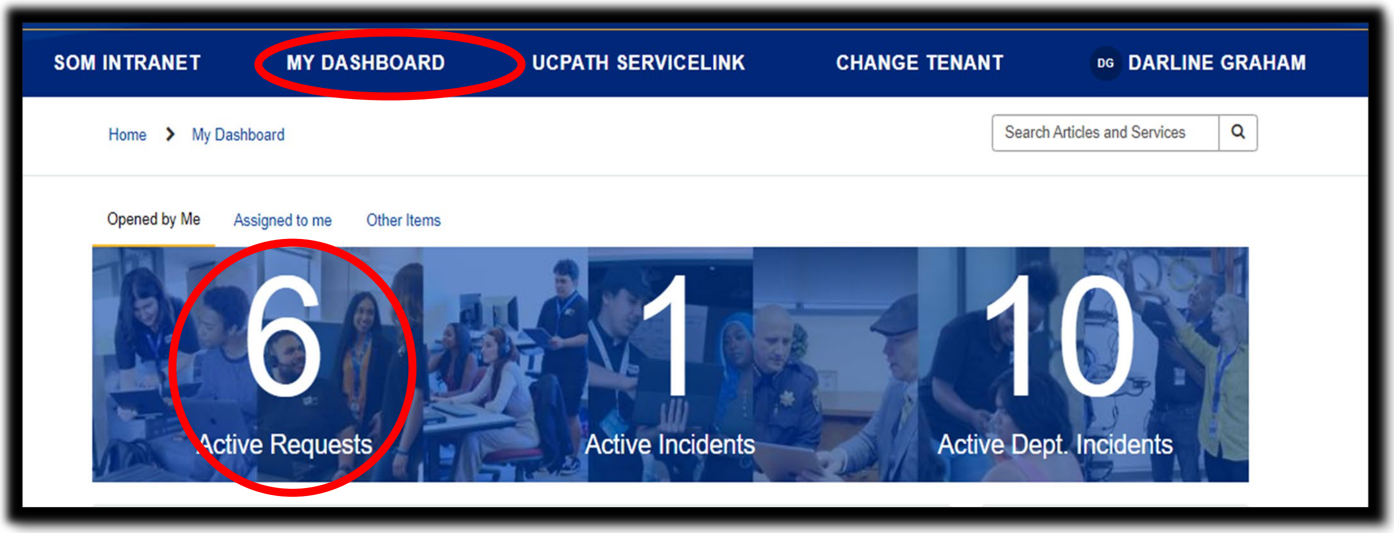


6. Add to the watchlist by typing first name, last name, and plus sign. Any attachments that were previously added will appear in this window. New attachments can be added by clicking on the paper clip on this page.

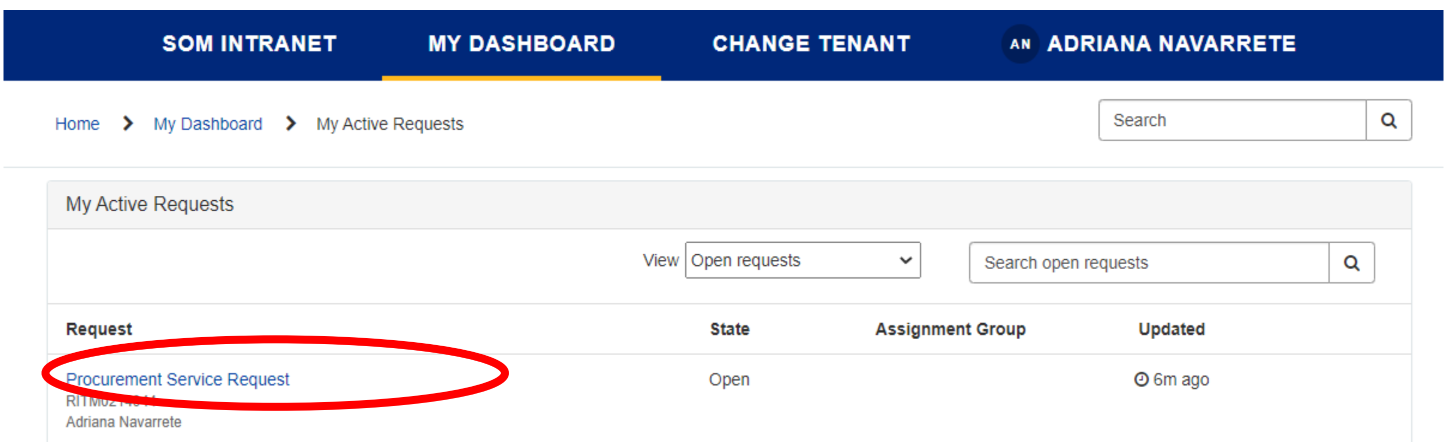


Viewing a Request

1. In the main ServiceLink portal go to “My Dashboard,” select “Active Requests.”



2. All active requests will be displayed. Click on the request.



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3. After clicking on the request, the status updates and comments will be displayed.