



## Self Service Procurement Catalog Requisition Guide

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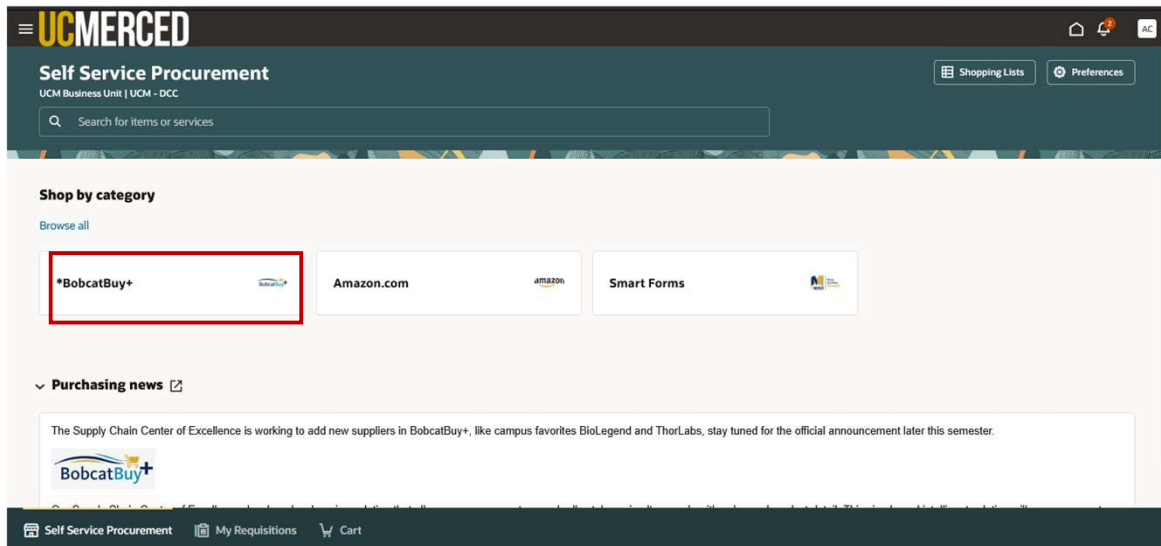
Last Updated:

[supplychain.ucmerced.edu/procurement/how-buy-uc-merced/RSSP](https://supplychain.ucmerced.edu/procurement/how-buy-uc-merced/RSSP)

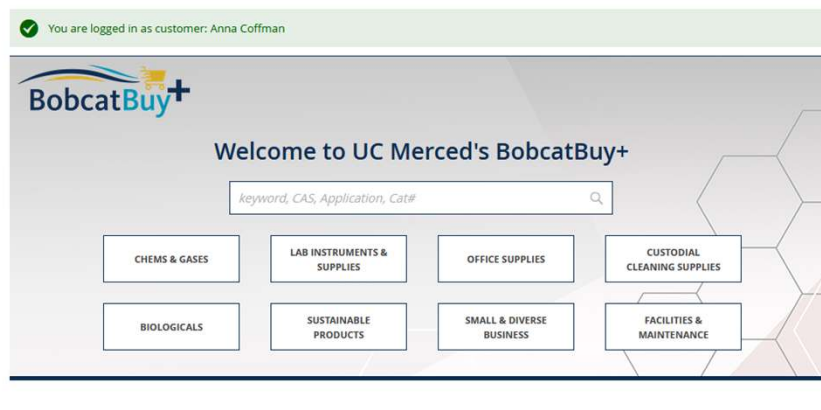
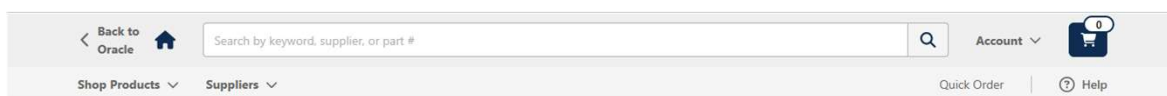
### 1. Login to Oracle, navigate to Procurement and select Purchase Requisitions (New)

A screenshot of the UCMerced Oracle Procurement dashboard. The top navigation bar shows 'UCMERCED Dev 1 02/03/2025' and 'Good afternoon, Anna Coffman'. Below this, there are tabs for 'Receivables', 'Payables', 'Fixed Assets', 'Procurement', 'Tools', and 'Others'. The 'Procurement' tab is selected. Under the 'QUICK ACTIONS' section, there are several icons: 'Process Requisitions', 'Purchase Orders (New)', 'Purchase Orders', 'Purchase Agreements', 'Suppliers', 'Purchase Requisitions', 'Purchase Requisitions (New)', 'Purchase Agreements', 'Purchase Orders', and 'My Receipts'. A red box highlights the 'Purchase Requisitions (New)' icon, and a red arrow points to it from the text 'Look out for Tech Tips from Procurement to make your requisitioning even easier!'. The bottom of the dashboard shows a 'Things to Finish' section with two items: '1 hour ago' and '2 hours ago'.

## 2. Select the catalog to begin your shopping



## 3. Shop and select your item in BobcatBuy+



## 4. Add your items to cart

Home > Westcott Titanium Bonded Non-Stick Scissors...

**Westcott Titanium Bonded Non-Stick Scissors, 8in, Straight, Gray/Yellow** \$ Purchases

Sold By: ODP Business Solutions

**\$15.89** / EA (10.00" x 3.50" x 0.50") Manufacturer SKU: 14849

Qty  **Add to Cart** ADD TO WISH LIST ADD TO COMPARE

**Buying Options**

ODP Business Solutions 879363	<span>In Stock</span> Ready to ship	\$15.89 EA (10.00" x 3.50" x 0.50")	1	<b>Add to Cart</b>
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uc-merced-dev.labviva.com/catalog/product/view/id/12083151# Specifications

## 5. Checkout and Place Order to send your cart to Oracle to begin your Requisition

Back to Oracle Search by keyword, supplier, or part # Account 0

Shop Products Suppliers Quick Order Help

**ORDER SUMMARY**

Item	Qty	Price	Line Total
Westcott Titanium Bonded Non-Stick Scissors, 8in, Straight, Gray/Yellow Made By: ACME UNITED Manufacturer SKU: 14849 Supplier: ODP Business Solutions Supplier Part: 879363 Unit: EA (10.00" x 3.50" x 0.50")	1	\$15.89	\$15.89

**Place Order**

## 6. Begin your Requisition by clicking the Pencil icon at the summary level to enter your purchase information

The screenshot shows the UCMERGED Cart page for Requisition UCMR00076239. A central overlay contains a "Tech Tip" and a "Requisition summary" panel.

**Tech Tip:** Requisition data entered here will apply to all lines of your order; split funding will be covered on slide 12

**Requisition summary**

Subtotal	\$15.89
Nonrecoverable Tax	\$1.31
<b>Approval Amount</b>	<b>\$17.20</b>

Description  
Requester: Anna Coffman  
Deliver to Location: UCM - DCC  
Charge To: 1011-13000-M553000-523200-80-000-0000000000-00  
Funds Status: Not reserved  
Budget Date: 07/07/2025

Below the summary, a list of items is shown with a quantity of 1 and a price of \$15.89 Each. The item description is "[CARTID: 5784]Westcott Titanium Bonded Non-Stick".

## 7. Complete Requisition fields for your order

The screenshot shows the UCMERGED Requisition form for Requisition UCMR00076239. Red boxes highlight the required fields for completion.

**Required Fields:**

- Description (Required)
- Justification
- Overriding Approver (Dropdown)
- Requester (Dropdown, currently Anna Coffman)
- Deliver to Location (Dropdown, currently UCM - DCC)
- Requested Delivery Date (Calendar icon, currently 07/07/2025)
- Urgent (Checkbox)

Buttons for "Cancel" and "Update" are visible at the top right of the form.

## 8. Continue completing the required information

UCMR00076239  
Requisition

Cancel Update

**Project costing**

Project Number

**Charge account**

Charge To

**Budgetary control**

Budget Date  
07/07/2025

**Additional information**

Attention to (Recipient of Package or Service)  
Required

Room Number  
Required

Deliver-To Building Name  
Required

**Tech Tip:** The funding source entered here will apply to the entire requisition, **please choose one.**  
**Build your Project** (GNT, CNT, NBA) by using the drop-down arrows in Project Costing field  
**Build your Charge Account** (COA's) using the arrow indicator. The system will automatically provide available segments, and all fields are required.

## 9. Continue completing the required information for your order as applicable

**Additional information**

Attention to (Recipient of Package or Service)  
Coffman, Anna

Room Number  
101

Deliver-To Building Name  
DOWNTOWN CAMPUS CENTER

**Notes**

Note to Supplier

**Attachments**

Category  
Internal to Requisition

**Drag and Drop**  
Select or drop files here.

URL

Add URL

10. Once all information is complete, scroll to the top and select Update

The screenshot shows the UCMERGED Requisition form for requisition UCMR00076239. The form includes fields for Description (Guided Demo), Justification (Guided Self Service Procurement Demo), and an Overriding Approver dropdown. Under the Delivery section, there are dropdowns for Requester (Anna Coffman) and Deliver to Location (UCM - DCC), along with a Requested Delivery Date of 07/07/2025. A checkbox for Urgent is also present. At the top right, the 'Update' button is highlighted with a red box, and a red arrow points to it from below.

11. Submit your requisition with a single funding source and no additional approvers

The screenshot shows the UCMERGED Cart page for requisition UCMR00076239. The cart contains one item: [CARTID: 5784] Westcott Titanium Bonded Non-Stick Scis, priced at \$15.89 Each with a quantity of 1. To the right, a 'Requisition summary' table shows a Subtotal of \$15.89, Nonrecoverable Tax of \$1.31, and an Approval Amount of \$17.20. The summary also lists the Description, Justification, Requester (Anna Coffman), Deliver to Location (UCM - DCC), Charge To (1011-19900-MS65000-523200-72-000-0000000000-00), Funds Status (Not reserved), and Budget Date. At the top right, the 'Submit' button is highlighted with a red box.

Continue for: split funding or additional approvers

12. After entering all Requisition information, Select the Truck Icon to access specific line-level funding

The screenshot shows the UCMERGED Cart interface for Requisition UCMR00076239. The main area displays a single line item: [CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis, priced at \$15.89 Each with a quantity of 1. To the right of the item is a BobcatBuy logo and a red box highlighting a truck icon. A Requisition summary panel on the right shows a subtotal of \$15.89, nonrecoverable tax of \$1.31, and an approval amount of \$17.20. The summary also includes details like Description (Guided Demo), Justification (Guided Self Service Procurement Demo), Requester (Anna Coffman), and Deliver to Location (UCM - DCC).

13. In the Line Details, scroll down to view the Billing information for the line

The screenshot shows the UCMERGED Requisition Line Details page for Requisition UCMR00076239. The page is divided into two tabs: Line Details and Delivery and Billing Details. The Delivery and Billing Details tab is active, showing fields for Line Description ([CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis), Quantity (1), Requester (Anna Coffman), Requested Delivery Date (07/07/2025), Deliver-to Location (UCM - DCC), and Deliver-to Address (Technical Data, MERCED, CA 95343, UNITED STATES). A red arrow points down from the top of the page towards the bottom, indicating the scroll action required to view the Billing information.

## 14. Using the three-dot-menu to the right of Distribution 1, select split to add a secondary funding source

**Delivery**

Requester: Anna Coffman  
Requested Delivery Date: 07/07/2025  
Deliver-to Location: UCM - DCC  
Deliver-to Address: Technical Data, MERCED, CA 95343, UNITED STATES

☐ Urgent

**Billing**

Total Percentage	Total Amount	Total Quantity
100	\$15.89	1

Distribution 1:  
1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

Percentage	Amount	Quantity
100	\$15.89	1

Three-dot menu (highlighted) → Edit → Split (highlighted)

## 15. Delete all pre-populated funding sources

**Delivery**

Requester: Anna Coffman  
Requested Delivery Date: 7/21/25  
Deliver-to Location: UCM - DCC  
Deliver-to Address: Technical Data, MERCED, CA

☐ Urgent

**Billing**

Total Percentage	Total Amount	Total Quantity
100	\$15.89	1

Distribution 1:  
1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

**Tech Tip:** When adding or changing billing information, you must first fully delete all other funding sources for the system to recognize your new entry

**Distribution 2**

Quantity: [ ] Amount: [ ]  
Percentage: [ ] Budget Date: 07/07/2025

**Project costing**

Project Number: [ ]

**Charge account**

Charge To: 1000-523200-72-000-0000000000-000-000000-0000-000000-000000

**Additional information**

Sub Activity Additional Information: [ ] Fair Wage Fair Work: NO  
R&D Reduced Tax Rate Applies: NO ServiceNow Ticket Number: [ ]  
Workorder Number: [ ] Location of Services Performed: Delivered on Campus

Cancel Create



16. Enter the quantity, amount, or percentage to be distributed to the new funding source. The other boxes will pre-populate once you enter one of the options

**Delivery**

Requester: Anna Coffman  
Requested Delivery Date: 07/07/2025

Deliver-to Location: UCM - DCC

Deliver-to Address: Technical Data, MERCED, CA 95343, UNITED STATES

☐ Urgent

**Billing**

Total

Total Percentage	Total Amount
100	\$15.89

Distribution 1: 1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

Percentage	Amount
100	\$15.89

**Distribution 2**

Quantity: 0.5  
Amount: \$7.95  
Percentage: 50  
Budget Date: 07/07/2025

**Project costing**

Project Number: [dropdown]

**Charge account**

Charge To: [dropdown]

**Additional information**

Sub Activity Additional Information: [dropdown]  
Fair Wage Fair Work: NO  
R&D Reduced Tax Rate Applies: NO  
ServiceNow Ticket Number: [dropdown]  
Workorder Number: [dropdown]  
Location of Services Performed: Delivered on Campus

Cancel Create

17. Enter your second funding source for the line

**Delivery**

Requester: Anna Coffman  
Requested Delivery Date: 07/07/2025

Deliver-to Location: UCM - DCC

Deliver-to Address: Technical Data, MERCED, CA 95343, UNITED STATES

☐ Urgent

**Billing**

Total

Total Percentage	Total Amount
100	\$15.89

Distribution 1: 1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

Percentage	Amount
100	\$15.89

**Distribution 2**

Quantity: [dropdown]  
Amount: [dropdown]  
Percentage: [dropdown]  
Budget Date: 07/07/2025

**Project costing**

Project Number: GNT1000120  
Task Number: Research SS Research SS  
Expenditure Item Date: 06/30/2025  
Expenditure Organization: [dropdown]  
Contract Number: [dropdown]  
Funding Source: [dropdown]  
UCM Sub Activity: [dropdown]  
UCM Physical Location: [dropdown]

**Charge account**

Charge To: [dropdown]

Cancel Create

**Tech Tip:** You must complete the Project Costing area for projects beginning with GNT, CNT, and NBA. Utilize the drop-down menu to complete each segment, choosing one of the pre-populated options.

18. Once the second funding source is fully entered, select Create

**Delivery**

Requester: Anna Coffman  
 Deliver-to Location: UCM - DCC  
 Deliver-to Address: Technical Data, MERCED, CA 95343, UNITED STATES

☐ Urgent

**Billing**

**Total**

Total Percentage	Total Amount
100	\$15.89

Distribution 1  
 1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

Percentage	Amount
100	\$15.89

**Distribution 2**

Quantity: 0.5  
 Amount: \$7.95  
 Percentage: 50  
 Budget Date: 07/07/2025

**Project costing**

Project Number: GNT1000120  
 Task Number: Research SS  
 Expenditure Item Date: 06/30/2025  
 Expenditure Type: 523200-OTHER NON MEDIC  
 Expenditure Organization: F105000-HEALTH SCIENCE R  
 Contract Number: RC116285UCMerced  
 Funding Source: MICHIGAN STATE UNIVERSIT  
 UCM Sub Activity: 000000  
 UCM Physical Location: 000

**Charge account**

Charge To: [Field]

Buttons: Cancel, Create

19. Distribution details are updated showing allocations for all funds

**Billing**

**Total**

Total Percentage	Total Amount	Total Quantity
100	\$15.9	1

Distribution 1  
 1011-19900-M565000-523200-72-000-0000000000-000-000000-0000-000000-000000

Percentage	Amount	Quantity
50	\$7.95	0.5

Distribution 2  
 1011-20001-F105000-523200-44-802-GNT1000120-000-000000-0000-000000-000000, GNT1000120, Research SS

Percentage	Amount	Quantity
50	\$7.95	0.5

Message: Distribution 2 created

20. In the Line Details, after successfully adding your additional distributions, scroll up and select update

**UC MERCED**

**Requisition Line Details**  
Requisition UCMR00076239

Cancel Update

Line Details Delivery and Billing Details

Line Description  
[CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis

Quantity  
1

**Delivery**

Requester  
Anna Coffman

Requested Delivery Date  
07/07/2025

Deliver-to Location  
UCM - DCC

Deliver-to Address  
Technical Data, MERCED, CA 95343, UNITED STATES

☐ Urgent

21. Submit your requisition with multiple funding sources and no additional approvers

**UC MERCED**

**Cart**  
Requisition UCMR00076239

Submit

☐ 1 Item [Edit Multiple](#)

[CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis  
Sold by OOP Business Solutions, LLC

☐ \$15.89 Each

Quantity  
1

**Requisition summary**

Subtotal	\$15.89
Nonrecoverable Tax	\$1.31
<b>Approval Amount</b>	<b>\$17.20</b>

Description  
Guided Demo

Justification  
Guided Self Service Procurement Demo

Requester  
Anna Coffman

Deliver to Location  
UCM - DCC

Funds Status  
Not reserved

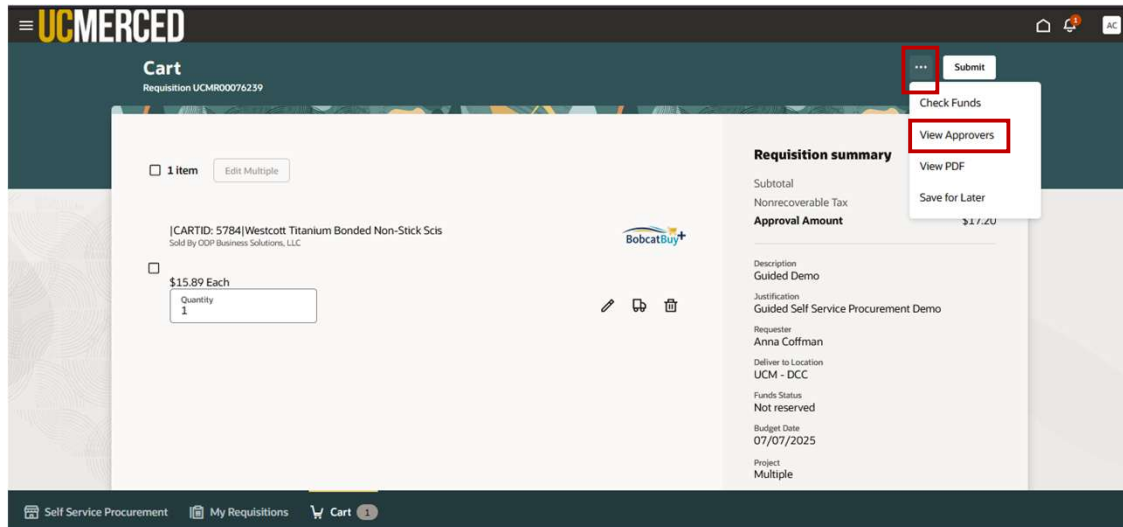
Budget Date  
07/07/2025

Project  
Multiple

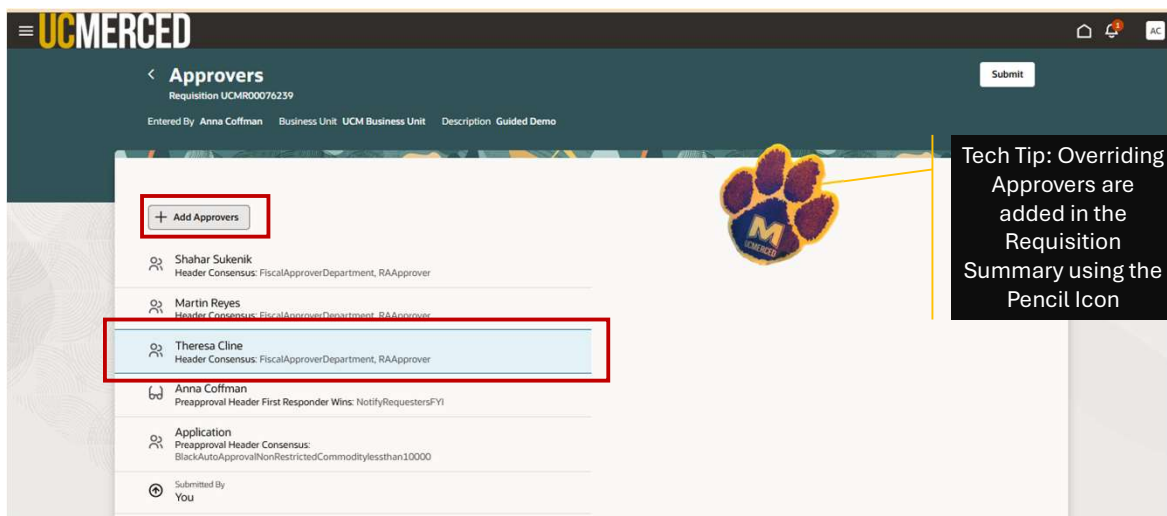
Self Service Procurement My Requisitions Cart 1

Continue if: additional approvers needed

22. After entering all Requisition information, select the three-dot menu next to Submit to view current approvers



23. To add an approver, select an existing approver at the appropriate stage desired and select +Add Approvers. This will create the new individual as a parallel approver



24. Type the lived name of the individual and select Add; select FYI Only if you only want them to receive notification of the requisition but formal approval is not necessary. Once complete, use the arrow to the left of Approvers to return to the Cart screen.

You are in Dev1 (Test environment dedicated to Procurement).

**UCMERGED**

**< Approvers**  
Requisition UCMR00076239

Entered By: Anna Coffman | Business Unit: UCM Business Unit | Description: Guided Demo

**+ Add Approvers**

- Shahar Sukenik  
Header Consensus: FiscalApproverDepartment, RAAApprover
- Martin Reyes  
Header Consensus: FiscalApproverDepartment, RAAApprover
- Theresa Cline  
Header Consensus: FiscalApproverDepartment, RAAApprover
- Anna Coffman  
Preapproval Header First Responder Wins: NotifyRequestersFYI
- Application  
Preapproval Header Consensus: BlackAutoApprovalNonRestrictedCommoditylessThan10000
- Submitted By  
You

**Add approvers**  
Theresa Cline

Select the approver you want to add parallel to the current participant.

Approver

☐ FYI only

Cancel Add

25. Submit your requisition with split funding and additional approvers

**UCMERGED**

**Cart**  
Requisition UCMR00076239

1 item | Edit Multiple

[CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis  
Sold by UOP Business Solutions, LLC

\$15.89 Each  
Quantity: 1

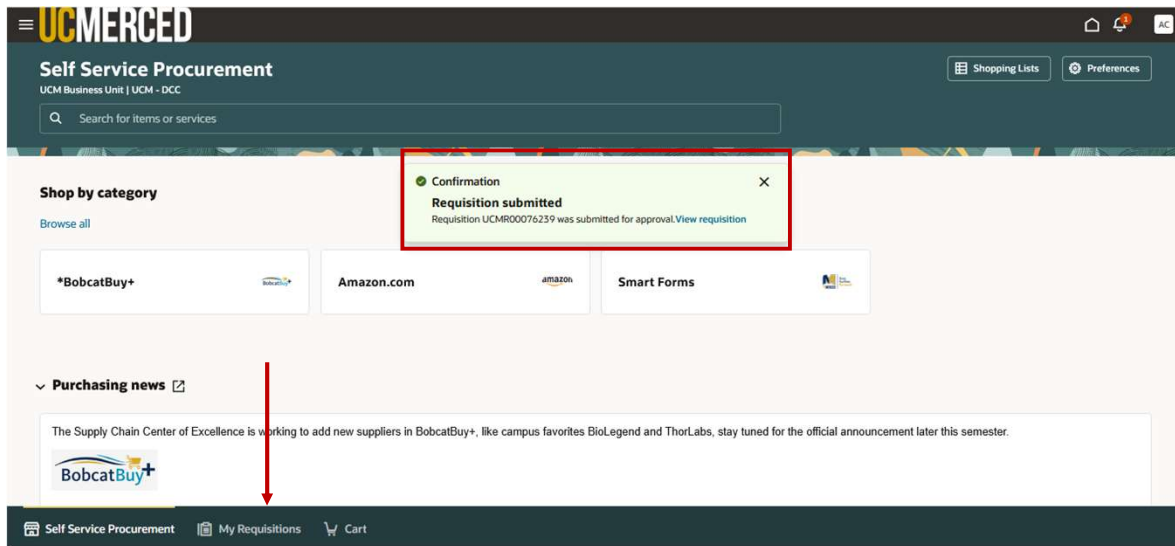
**Requisition summary**

Subtotal	\$15.89
Nonrecoverable Tax	\$1.31
<b>Approval Amount</b>	<b>\$17.20</b>

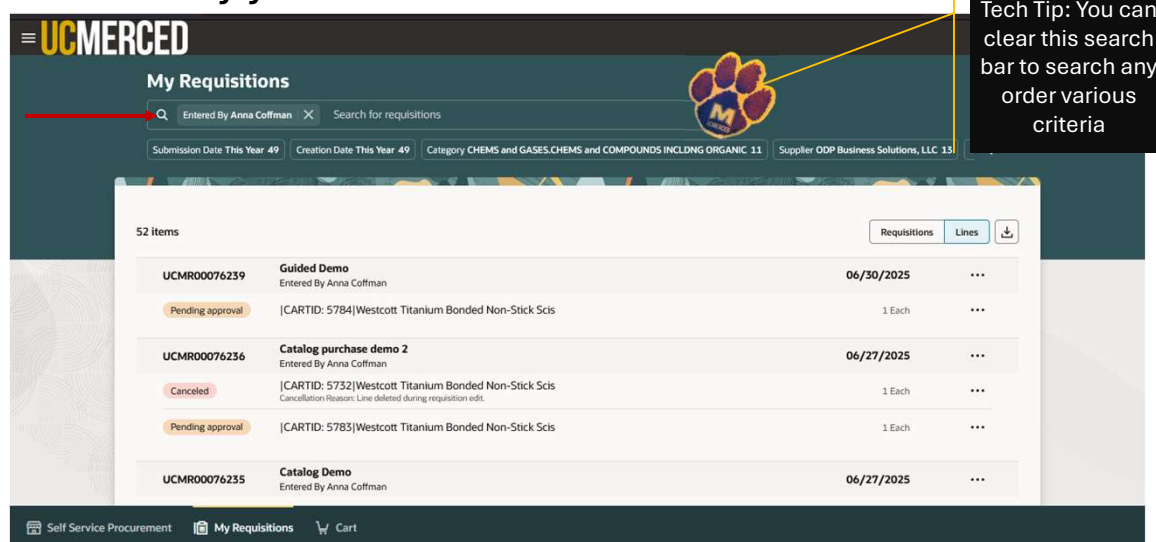
Description: Guided Demo  
Justification: Guided Self Service Procurement Demo  
Requester: Anna Coffman  
Deliver to Location: UCM - DCC  
Funds Status: Not reserved  
Budget Date: 07/07/2025  
Project: Multiple

Self Service Procurement | My Requisitions | Cart 1

26. Confirmation message popup appears with successful submission.  
To view the requisition, select View Requisition from the message or select My Requisitions below at the bottom of the page



27. View or search previously submitted requisitions entered by you to see their statuses



28. Use the three-dot-menu on the requisition to take various actions. Editing a requisition will recall/remove it from workflow and resubmission will be required after completing any edits

The screenshot displays the 'My Requisitions' interface in the UCMERGED system. At the top, there's a search bar with 'Entered By Anna Coffman' and a filter for 'Submission Date This Year 49'. Below this, a table lists requisitions. The first requisition, UCMR00076239, is titled 'Guided Demo' and is in 'Pending approval' status. A red box highlights the three-dot menu for this requisition, which contains the following options: View Details, Edit, View Approvers, Duplicate, View Document History, View Life Cycle, Reassign, View PDF, and Cancel.

Requisition ID	Title	Status	Description
UCMR00076239	Guided Demo	Pending approval	[CARTID: 5784]Westcott Titanium Bonded Non-Stick Scis
UCMR00076236	Catalog purchase demo 2	Canceled	[CARTID: 5732]Westcott Titanium Bonded Non-Stick Scis Cancellation Reason: Line deleted during requisition edit.
UCMR00076235	Catalog Demo	Pending approval	[CARTID: 5785]Westcott Titanium Bonded Non-Stick Scis