



## NEED TO TAKE ACTION NOW? FOLLOW THESE BRC QUICK TIPS TO GET YOU STARTED!

### Purchasing Related Actions

Purchasing methods may vary based on types of goods or services you are acquiring.

I want to buy	Purchasing method	Who to contact for questions
Most Goods	<ul style="list-style-type: none"> <li>▪ Shop Office Depot catalog in <a href="#">Oracle</a></li> <li>▪ Create a requisition in <a href="#">Oracle</a></li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
PCard purchase (UCOP Credit Card)	<ul style="list-style-type: none"> <li>▪ Create a requisition in <a href="#">Oracle</a> to request the use of a BRC Pcard</li> <li>▪ <i>*Note - this process is currently under review and will change in the near future. We will send out a communication once the process has changed.</i></li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
Gift Cards	<ul style="list-style-type: none"> <li>▪ Create a request in <a href="#">Concur</a></li> <li>▪ Be sure to review policy to ensure that this purchase is appropriate               <ul style="list-style-type: none"> <li>✓ <a href="#">Employee Non-Cash Awards</a></li> <li>✓ <a href="#">Non-Employee Gifts</a></li> </ul> </li> <li>▪ <a href="#">UCOP Guideline</a> for employee <a href="#">SPOT Awards</a></li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
Service Awards	<ul style="list-style-type: none"> <li>▪ Submit <a href="#">ServiceNow</a> Request</li> <li>▪ Be sure to attach the completed and approved Service Award Request Form that you receive from your <a href="#">HR Business Partner</a></li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
Software	<ul style="list-style-type: none"> <li>▪ Submit a <a href="#">ServiceNow</a> request to IT Client Services</li> <li>▪ If ITCS cannot procure the software for you, submit a requisition in <a href="#">Oracle</a></li> </ul>	<a href="mailto:SERVICEDESK@ucop.edu">SERVICEDESK@ucop.edu</a> or <a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
Food for Business Meetings (small events)	<ul style="list-style-type: none"> <li>▪ If paying an invoice to a caterer / restaurant: Create a requisition in <a href="#">Oracle</a> <ul style="list-style-type: none"> <li>✓ Attach invoice to the requisition, along with all other required documentation</li> </ul> </li> <li>▪ If seeking reimbursement or paying a Travel &amp; Entertainment Card: Submit an Expense Report in <a href="#">Concur</a></li> <li>▪ Be sure to review the <a href="#">policy</a> and UCOP Guidelines to ensure that this purchase is appropriate               <ul style="list-style-type: none"> <li>✓ <a href="#">Are meals allowed at my meeting?</a></li> <li>✓ <a href="#">UCOP Meal and Entertainment Guidelines</a></li> </ul> </li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>

Food for Business Meetings (large events)	<ul style="list-style-type: none"> <li>Contact the UCOP <a href="#">Event Services Team</a></li> </ul>	<a href="mailto:UCOPEVENTS@ucop.edu">UCOPEVENTS@ucop.edu</a>
Food for Morale Building Activities	<ul style="list-style-type: none"> <li>Obtain required <a href="#">Additional approval</a> (before planning this event)</li> <li>Create a requisition in <a href="#">Oracle</a></li> <li>Be sure to review the <a href="#">policy</a> and UCOP Guidelines to ensure that this purchase is appropriate <ul style="list-style-type: none"> <li>✓ <a href="#">Are meals allowed at my meeting?</a></li> <li>✓ <a href="#">UCOP Meal and Entertainment Guidelines</a></li> <li>✓ <a href="#">UCOP Guideline for Morale Building Events</a></li> </ul> </li> </ul>	<a href="mailto:BRCPURCHASEandPAY@ucop.edu">BRCPURCHASEandPAY@ucop.edu</a>
Furniture (Non-Ergo)	<ul style="list-style-type: none"> <li>Create a requisition in <a href="#">Oracle</a></li> </ul>	<a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>
Furniture (Ergo)	<ul style="list-style-type: none"> <li>Contact the <a href="#">UCOP Ergonomics Program</a> to begin the process</li> <li>Create a requisition in <a href="#">Oracle</a> attaching the completed and signed ergonomic equipment form</li> </ul>	<a href="mailto:ERGONOMICS@ucop.edu">ERGONOMICS@ucop.edu</a>
Cell Phones	<ul style="list-style-type: none"> <li>Submit a request to IT Telecommunications in <a href="#">ServiceNow</a></li> </ul>	<a href="mailto:SERVICEDESK@ucop.edu">SERVICEDESK@ucop.edu</a>
Services	<ul style="list-style-type: none"> <li>Purchasing services requires a pre-approval through the <a href="#">Approval of Contractors and Consultants (AC&amp;C) process</a></li> <li>Create a requisition in <a href="#">Oracle</a> and attach the approved AC&amp;C form</li> </ul>	<a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>
Temporary Labor	<ul style="list-style-type: none"> <li>Create a requisition in <a href="#">Oracle</a></li> </ul>	<a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>

In addition to making purchases, you may want to know how to do the following:

## Other Procurement Related Actions

I want to	Process	Who to contact for questions
I know I need Pre-approval for hiring outside consultants and independent contractors. Where are the AC&C, DM, MPI Forms?	<ul style="list-style-type: none"> <li><a href="#">AC&amp;C Process</a></li> <li><a href="#">AC&amp;C Form</a></li> <li><a href="#">MPI Process and Forms</a></li> <li><a href="#">DM Process and Forms</a></li> </ul>	<a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>
Inquire about the status of a requisition	<ul style="list-style-type: none"> <li><a href="#">Lifecycle of a requisition</a></li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a>
Request a change order to a PO	<ul style="list-style-type: none"> <li>Create a requisition in <a href="#">Oracle</a></li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a> or <a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>
Correct any COA segments on a PO	<ul style="list-style-type: none"> <li>Create a requisition in <a href="#">Oracle</a> with new COA</li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a> <a href="mailto:UCOPContractor@ucop.edu">UCOPContractor@ucop.edu</a>
Submit an supplier invoice	<ul style="list-style-type: none"> <li>Email invoice to <a href="mailto:invoice@ucop.edu">invoice@ucop.edu</a></li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a>
See an invoice payment	<ul style="list-style-type: none"> <li><a href="#">Lifecycle of a requisition</a></li> <li><a href="#">Invoice Inquiry Report</a></li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a>
Look up a supplier in Oracle	<ul style="list-style-type: none"> <li><a href="#">Click here</a></li> </ul>	<a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a>

Set up a new supplier	<ul style="list-style-type: none"> <li>Submit a <a href="#">ServiceNow</a> request to have the <a href="#">new supplier set up</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Change supplier method of payment (ACH, Check)	<ul style="list-style-type: none"> <li>Submit a <a href="#">ServiceNow</a> request to have the <a href="#">existing supplier set up changed</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Change a supplier address	<ul style="list-style-type: none"> <li>Submit a <a href="#">ServiceNow</a> request to have the <a href="#">existing supplier set up changed</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>

## Travel Related Actions

I want to	Process	Who to contact for questions
Request approval to travel	<ul style="list-style-type: none"> <li>Submit a <a href="#">Pre-Travel Request</a> in <a href="#">Concur</a></li> </ul>	<a href="mailto:BRCTRAVELANDENT@ucop.edu">BRCTRAVELANDENT@ucop.edu</a>
Reimburse myself for travel expenses	<ul style="list-style-type: none"> <li>Submit an Expense Report in <a href="#">Concur</a></li> <li><a href="#">Concur Training Video</a></li> <li><a href="#">Travel Expense Reimbursement Training Video</a></li> </ul>	<a href="mailto:BRCTRAVELANDENT@ucop.edu">BRCTRAVELANDENT@ucop.edu</a>
Reimburse my boss/coworker for travel expenses	<ul style="list-style-type: none"> <li>Traveler needs to be <a href="#">Added As a Delegate</a> for the traveler in <a href="#">Concur</a></li> <li><a href="#">Concur Overview</a></li> </ul>	<a href="mailto:BRCTRAVELANDENT@ucop.edu">BRCTRAVELANDENT@ucop.edu</a>
Reimburse a non-employee for travel expenses	<ul style="list-style-type: none"> <li>Submit <a href="#">ServiceNow</a> request for a <a href="#">Non-Employee travel supplier</a></li> <li>Submit a <a href="#">Pre-Travel Request</a> in <a href="#">Concur</a> for a Non-Employee Traveler*</li> <li>Submit an Expense request in <a href="#">Concur</a> for a Non-Employee Traveler*</li> </ul> <p><i>*A non-employee traveler includes any non-UCOP employees, including employees from other UC Campuses</i></p>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a> <a href="mailto:BRCTRavelandEnt@ucop.edu">BRCTRavelandEnt@ucop.edu</a>
Reimburse an employee for non-travel expense	<ul style="list-style-type: none"> <li>Submit an Expense request in <a href="#">Concur</a></li> </ul>	<a href="mailto:BRCTRavelandEnt@ucop.edu">BRCTRavelandEnt@ucop.edu</a>
Direct Bill for Hotel / Airfare / Conference Registration	<ul style="list-style-type: none"> <li>Submit an expense request in <a href="#">Concur</a></li> </ul>	<a href="mailto:BRCTRavelandEnt@ucop.edu">BRCTRavelandEnt@ucop.edu</a>
Contractor Travel questions	<ul style="list-style-type: none"> <li><a href="#">UCOP Travel Guidelines for Outside Contractors</a></li> <li>Submit invoice to <a href="mailto:invoice@ucop.edu">invoice@ucop.edu</a> with all required backup documentation</li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a> <a href="mailto:BRCPURCHASEANDPAY@ucop.edu">BRCPURCHASEANDPAY@ucop.edu</a>
Recharge/Transfer Cost to a campus	<ul style="list-style-type: none"> <li>Submit a <a href="#">ServiceNow</a> request for a <a href="#">Cost Transfer</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Recharge/Transfer Cost a UCOP Department	<ul style="list-style-type: none"> <li>Submit a <a href="#">ServiceNow</a> request for a <a href="#">Cost Transfer</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>

## Accounting, Approval and other Actions

I want to	Process	Who to contact for questions
Submit an Interlocation Transfer of Funds	<ul style="list-style-type: none"> <li>▪ Submit <a href="#">ServiceNow</a> Request for an <a href="#">Interlocation Transfer of Funds</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Correct any segment of the COA for an expense on the GL (NPEAR)	<ul style="list-style-type: none"> <li>▪ Submit a <a href="#">ServiceNow</a> request for a <a href="#">Cost Transfer</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Process a financial journal	<ul style="list-style-type: none"> <li>▪ Submit a <a href="#">ServiceNow</a> request for a <a href="#">Cost Transfer</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Find my financial unit approver	<ul style="list-style-type: none"> <li>▪ Approvals are saved on the <a href="#">FIS SharePoint site</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Setup approver in Oracle	<ul style="list-style-type: none"> <li>▪ Submit <a href="#">ServiceNow</a> Request for <a href="#">Signature Delegation</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Setup approver in Concur	<ul style="list-style-type: none"> <li>▪ Submit <a href="#">ServiceNow</a> Request for <a href="#">Signature Delegation</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Deposit a check	<ul style="list-style-type: none"> <li>▪ Deliver the check and the deposit slip to the <a href="#">BRC Cashiers</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Create a new Chart of Account (COA) segment	<ul style="list-style-type: none"> <li>▪ Submit <a href="#">ServiceNow</a> Request for <a href="#">Chart of Account Maintenance</a></li> </ul>	<a href="mailto:BRC-CAAP@ucop.edu">BRC-CAAP@ucop.edu</a>
Report a problem in Oracle or Concur	<ul style="list-style-type: none"> <li>▪ Submit a <a href="#">ServiceNow</a> Request reporting the incident</li> <li>▪ In the Subject Line, start with “FIS” to designate the incident is related to the Financial Information System</li> </ul>	<a href="mailto:SERVICEDESK@ucop.edu">SERVICEDESK@ucop.edu</a>
Request access to Oracle	<ul style="list-style-type: none"> <li>▪ Submit a <a href="#">ServiceNow</a> Request for access to Oracle (FIS)</li> </ul>	<a href="mailto:SERVICEDESK@ucop.edu">SERVICEDESK@ucop.edu</a>