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Lucas County AMP Project
General Navigation Training

November 2019

LUCAS COUNTY
OHIO

Oracle Cloud Implementation Scope

Finance

- Financials
- AP Automation
- General Ledger
- Expenses
- Fixed Assets

Purchasing

- Purchasing
- Procurement Contracts
- Supplier Portal
- Self Service Procurement

Budgets

- Planning and Budgeting
- Enterprise Performance Reporting

Human Resources

- Human Capital Management
- Performance Management
- Goal Management
- Learning

Payroll & Time

- Payroll
- Time and Labor
- Workforce Compensation

Course Objectives

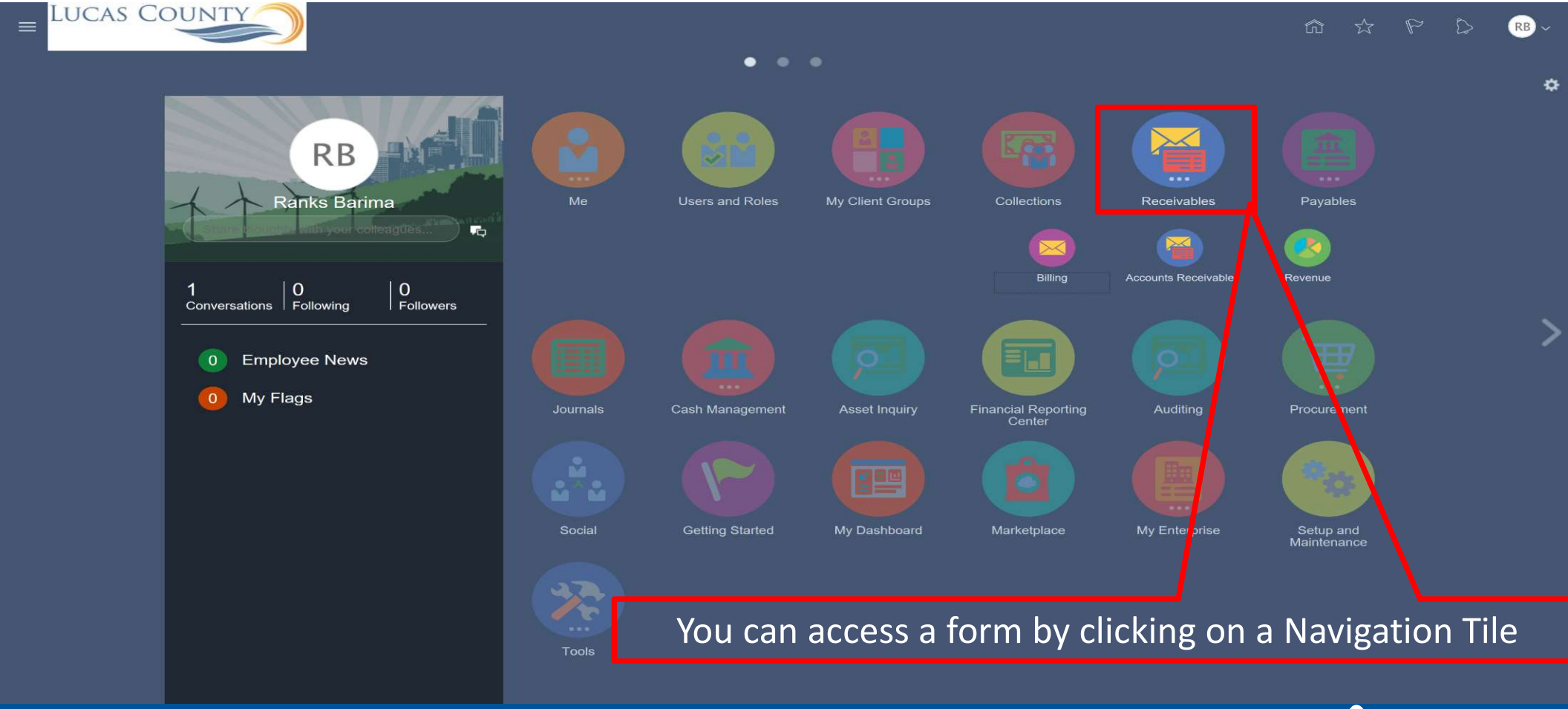
Upon completing this course, you will be able to:

- Log in to the application
- Navigate to a form from the Home page, and open a new browser tab
- Save a form to the Favorites menu
- Set User Preferences
- Respond to notifications in the Worklist
- Enter data in forms
- Common Icons
- Search for data, review search results in Excel, and save frequent searches
- Export search results to Excel
- Use Application Help

Log In

- You will sign into the Oracle Cloud Applications with your username and password
- You can also access the system using the URL below:…

Navigate to a Form - Group Icons



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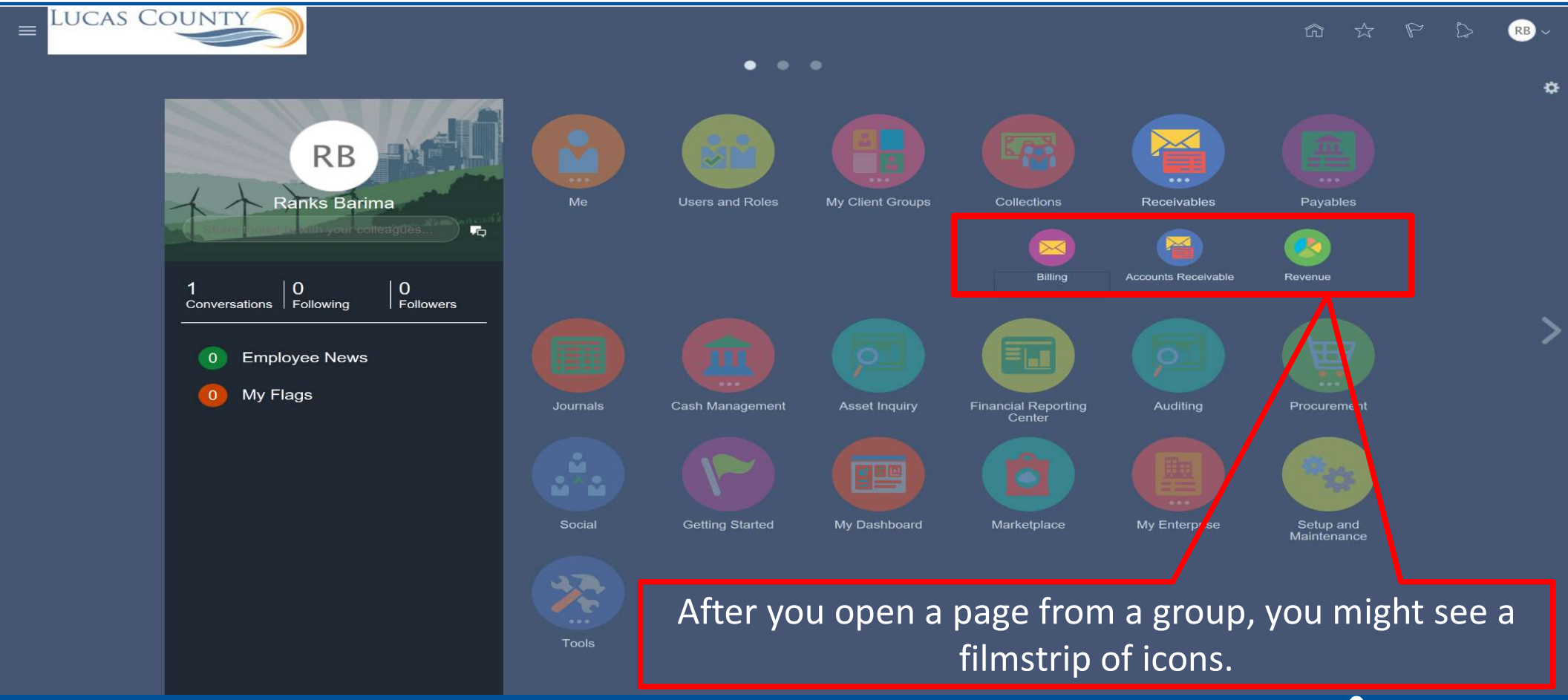
Navigate to a Form - Entry Icons



After you open a page from a group, you might see a filmstrip of icons.

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Navigate to a Form - Oracle Cloud Applications Springboard

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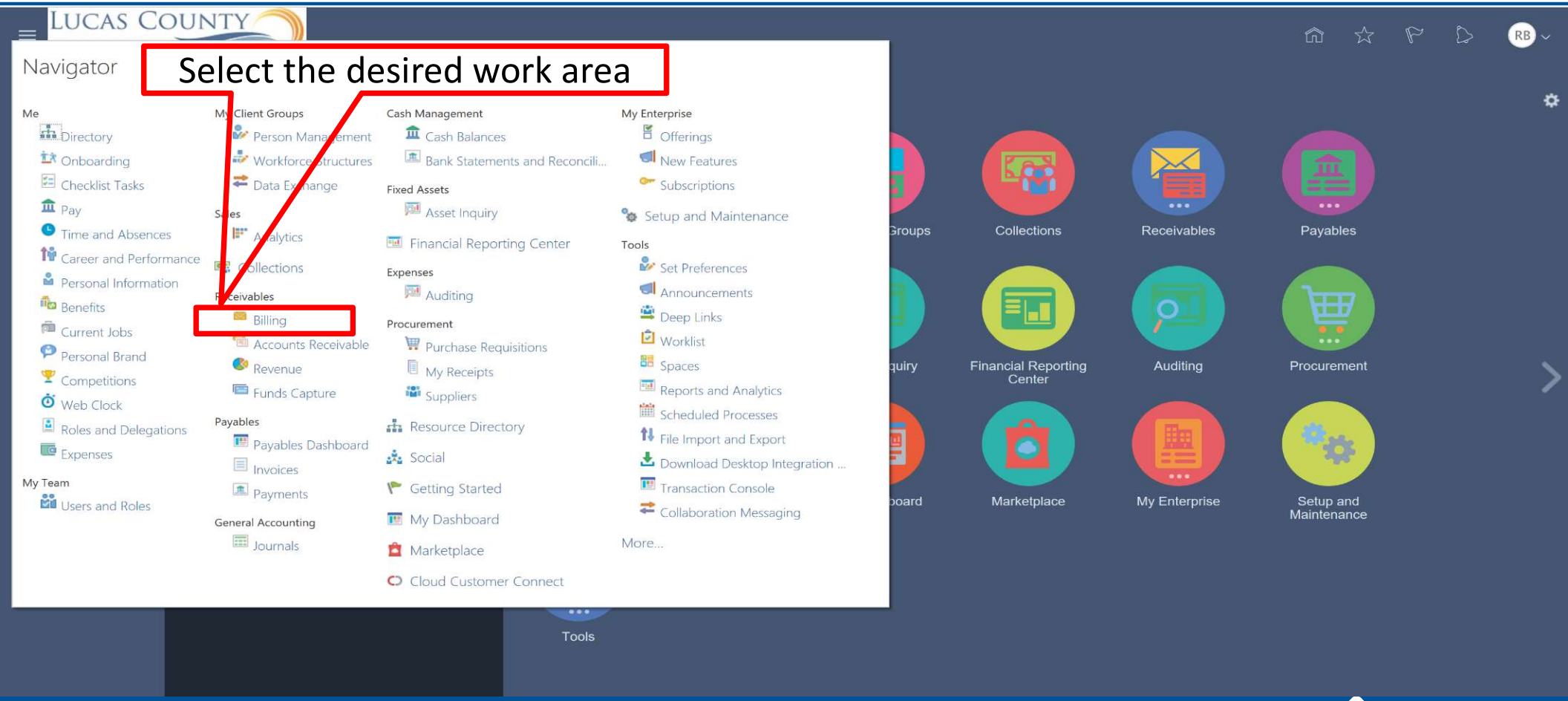
Navigate to a Form - Navigator Menu



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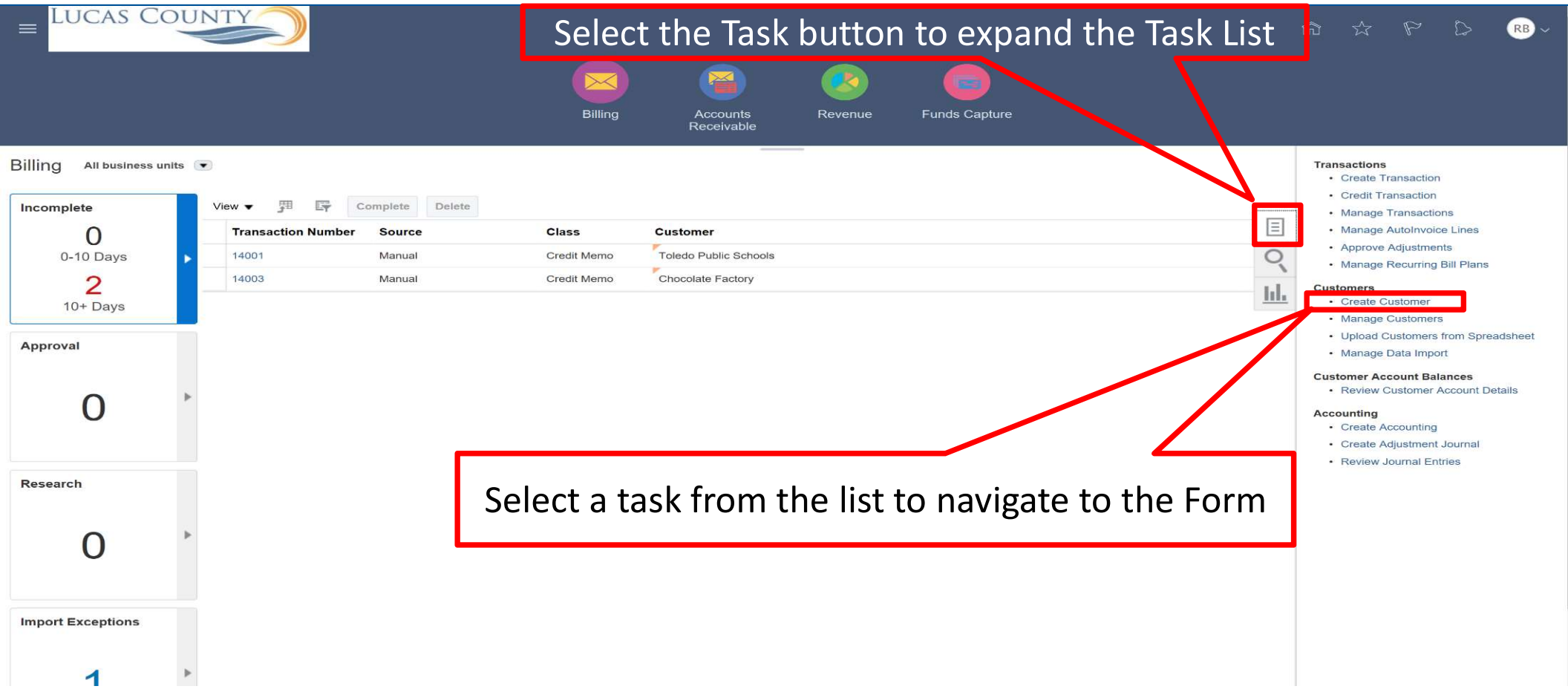
Navigate to a Form – Using the Task List



Navigate to a Form – Using the Task List (Cont.)

LUCAS COUNTY

RB

Create Organization Customer

The requested Form opens

Save and Close | Cancel

Customer Type: Organization

Organization Information

* Name
Registry ID: 40946

D-U-N-S Number
Taxpayer Identification Number

Account Information

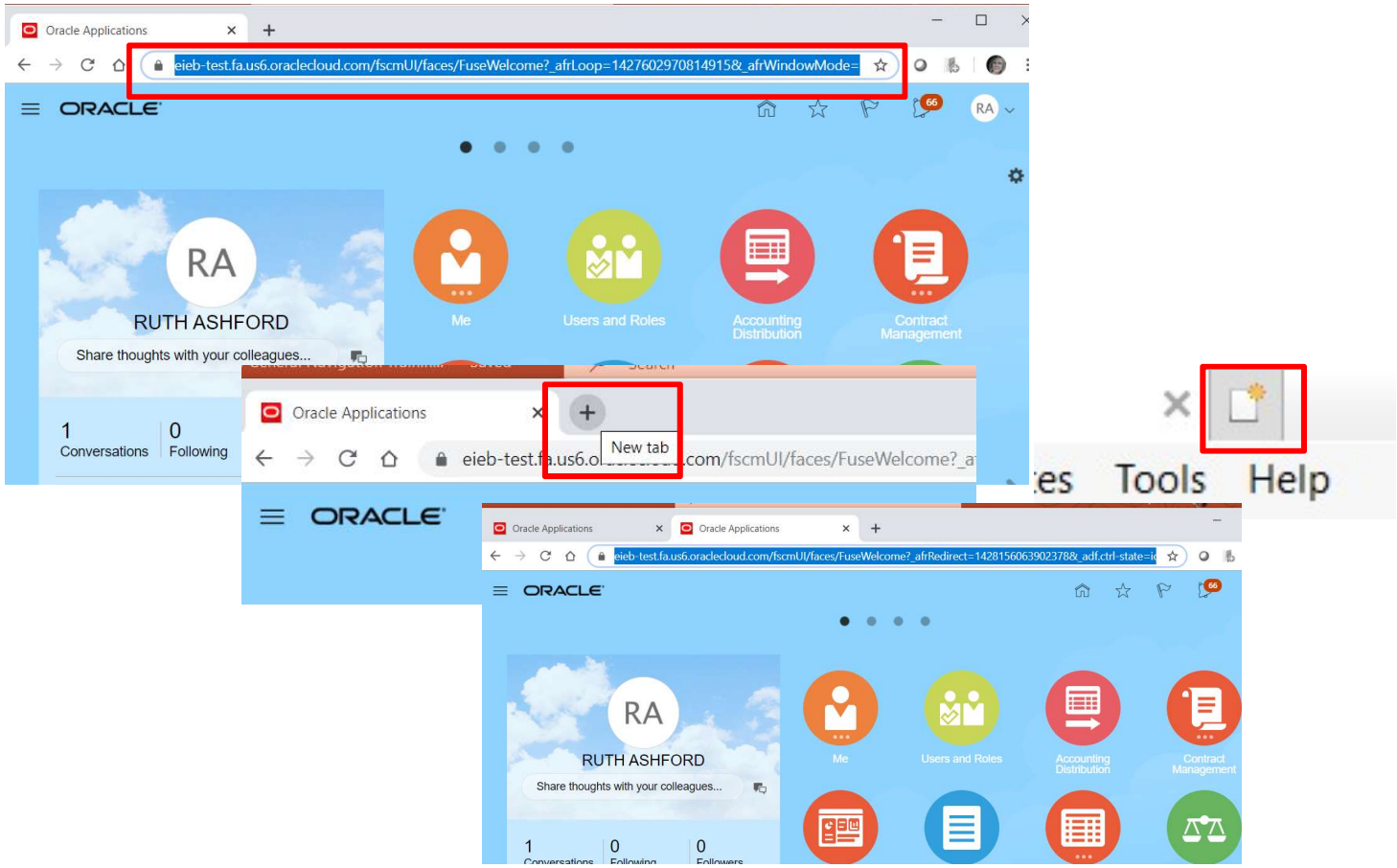
Account Number: 3001
Account Description
Account Type
Customer Class

Account Established Date: 10-14-2019
Account Termination Date

Account Address

* Account Address Set
* From Date: 10-14-2019
To Date

Navigate to a Form – Open a new Browser Window



To open a new browser window for multi-tasking:

- Copy the URL address of the window
- Add a new tab in whatever browser you are using. Examples for Chrome and Explorer are shown.
- Paste the URL into the address bar of the new window, and enter

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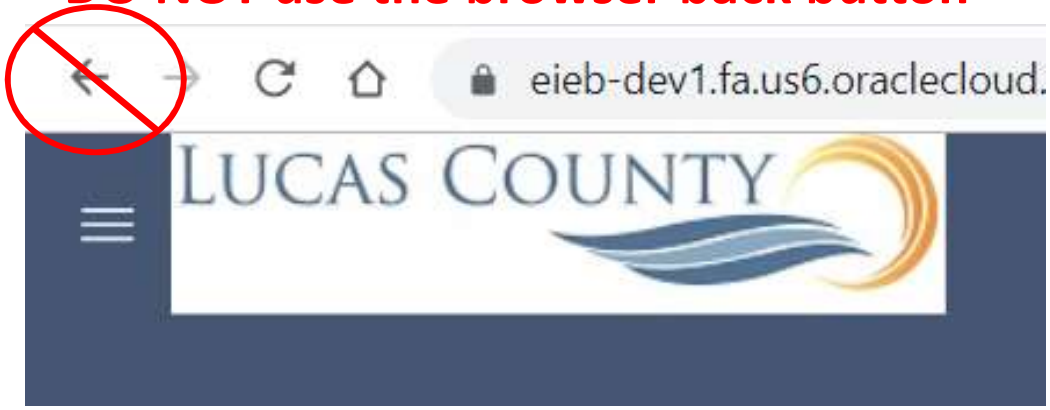
Navigate to a Form – Avoid Browser Back Button

DO NOT use the browser back button

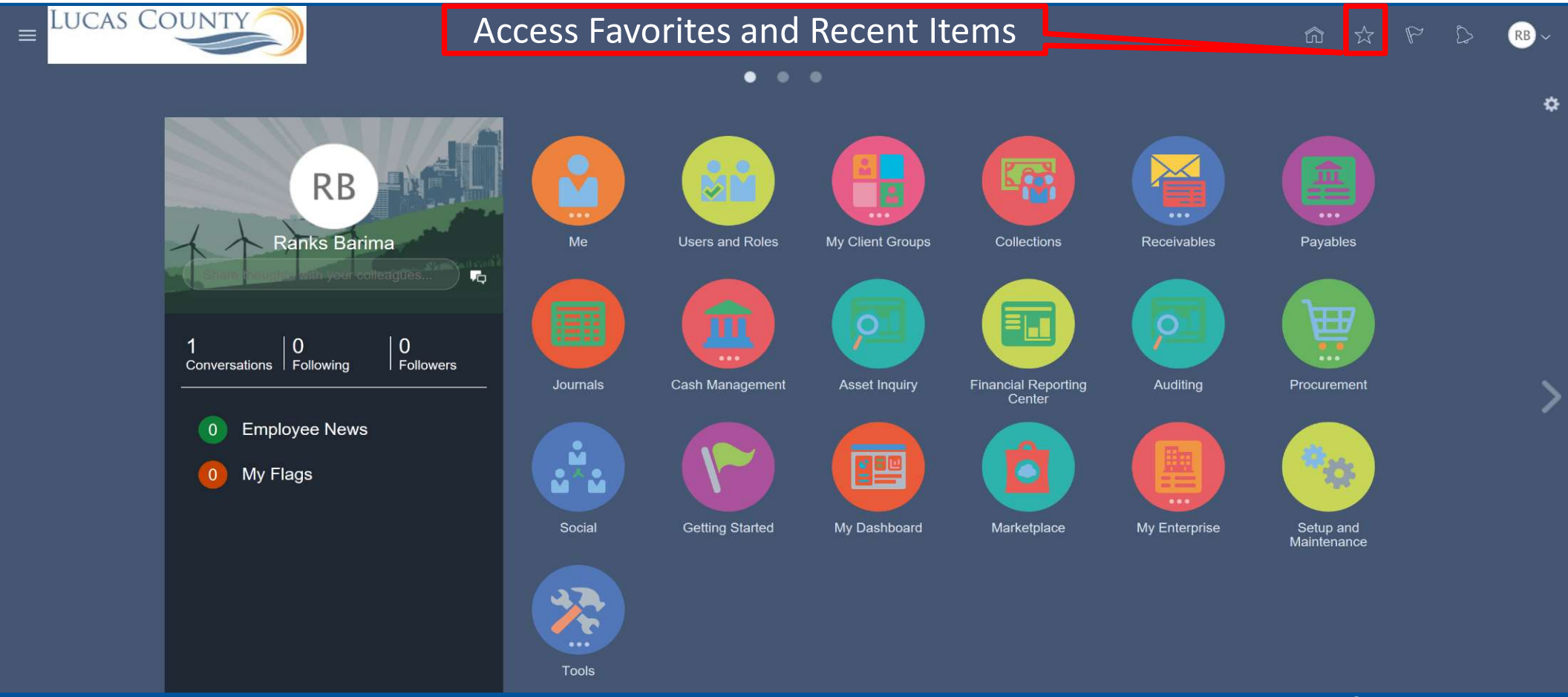


DO use these application buttons

Caution: To protect your data entered, **Do Not use the Back arrow** at the top of the web browser when you complete at ask. This button does not take you back to the previous page as you may expect and may result in loss of data.

Even if data does not need to be saved, you will still need to click the **Done**, **Complete** button. **Save and Close** or **Cancel** buttons are also options you will see and use.

Save a Form to the Favorites Menu - Favorites and Recent Items



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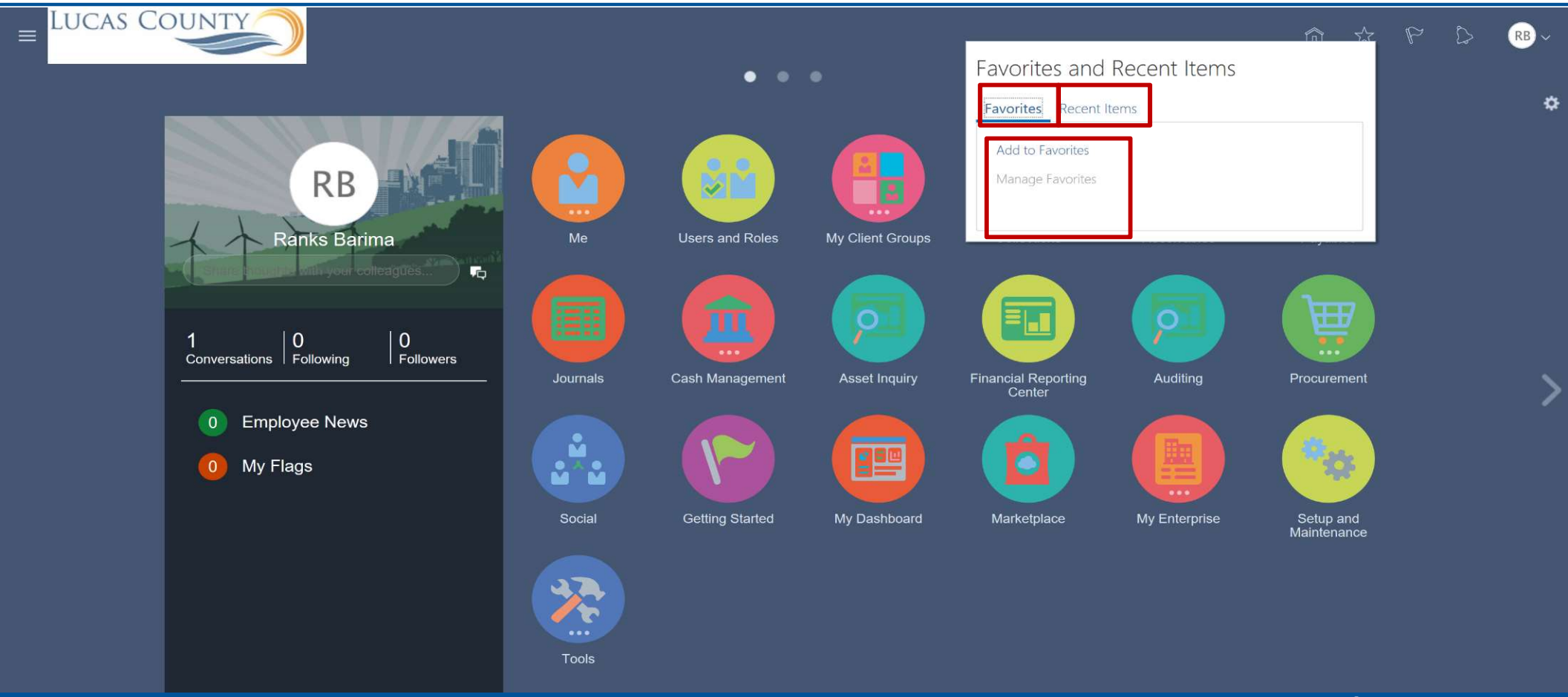
Save a Form to the Favorites Menu - Favorites and Recent Items (Cont.)



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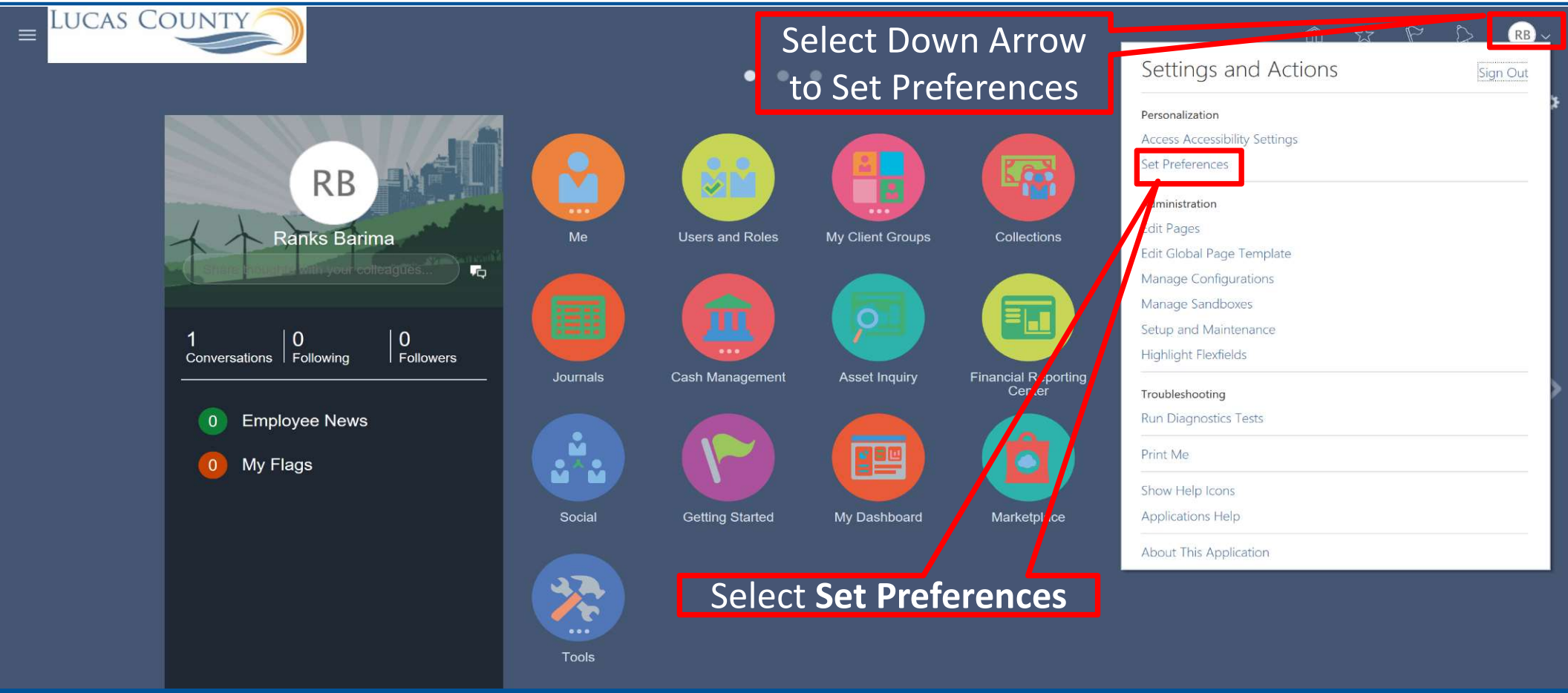
Set User Preferences



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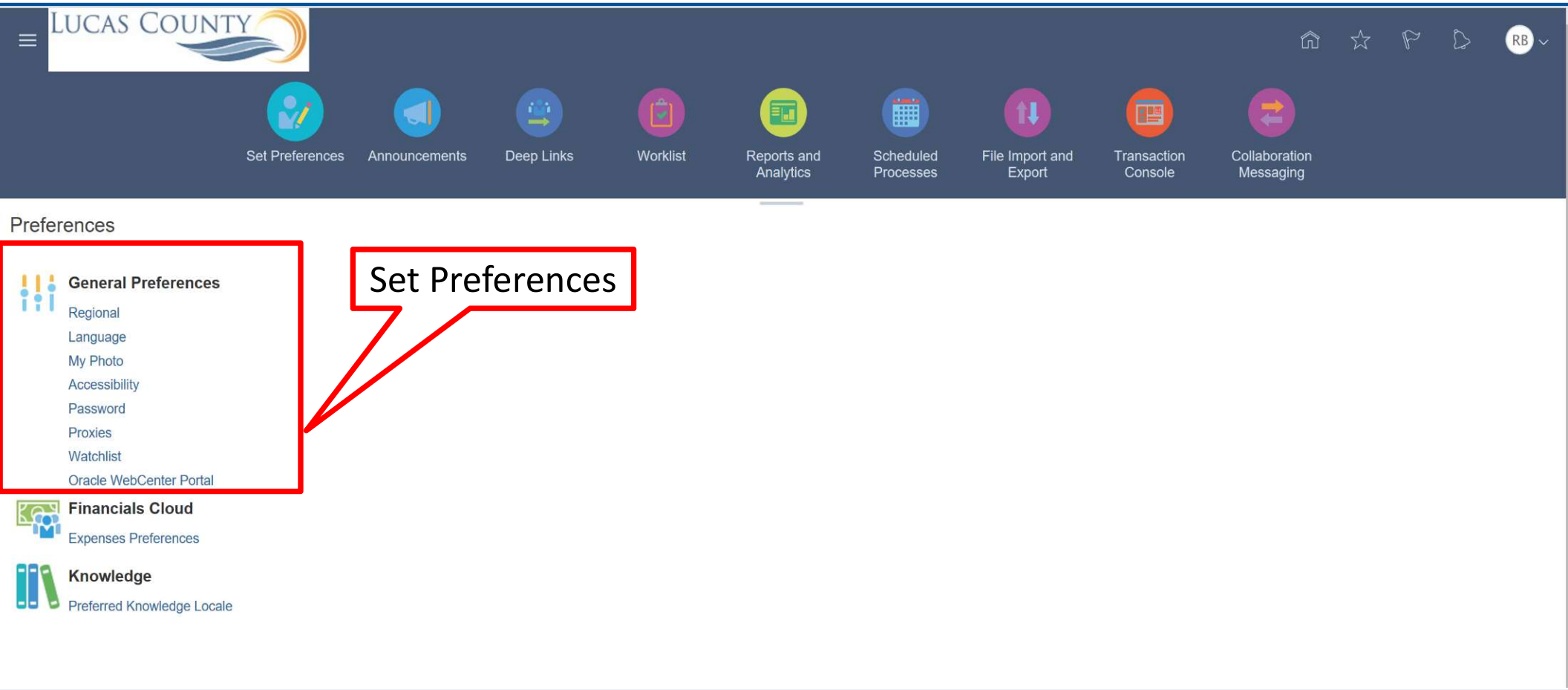
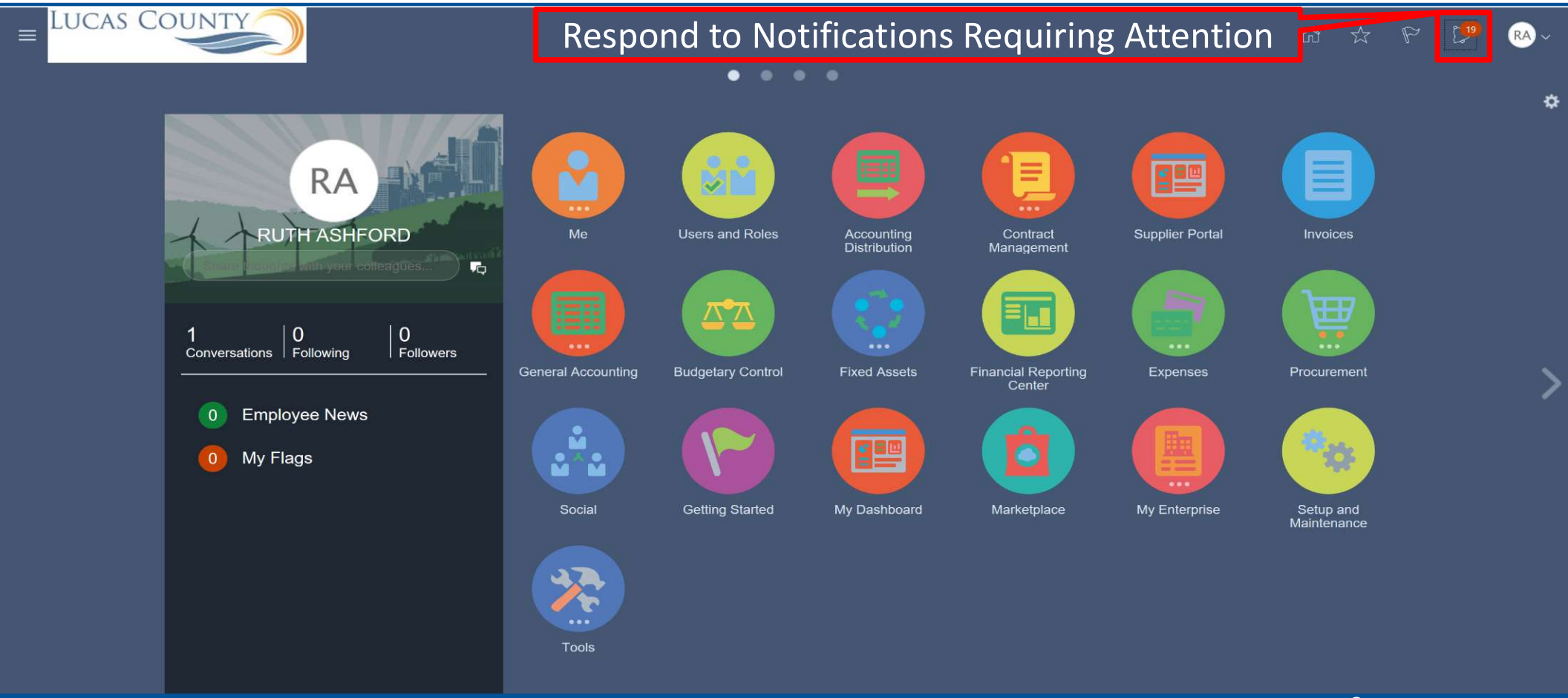
Set User Preferences (Cont.)



Respond to Notifications in the Worklist



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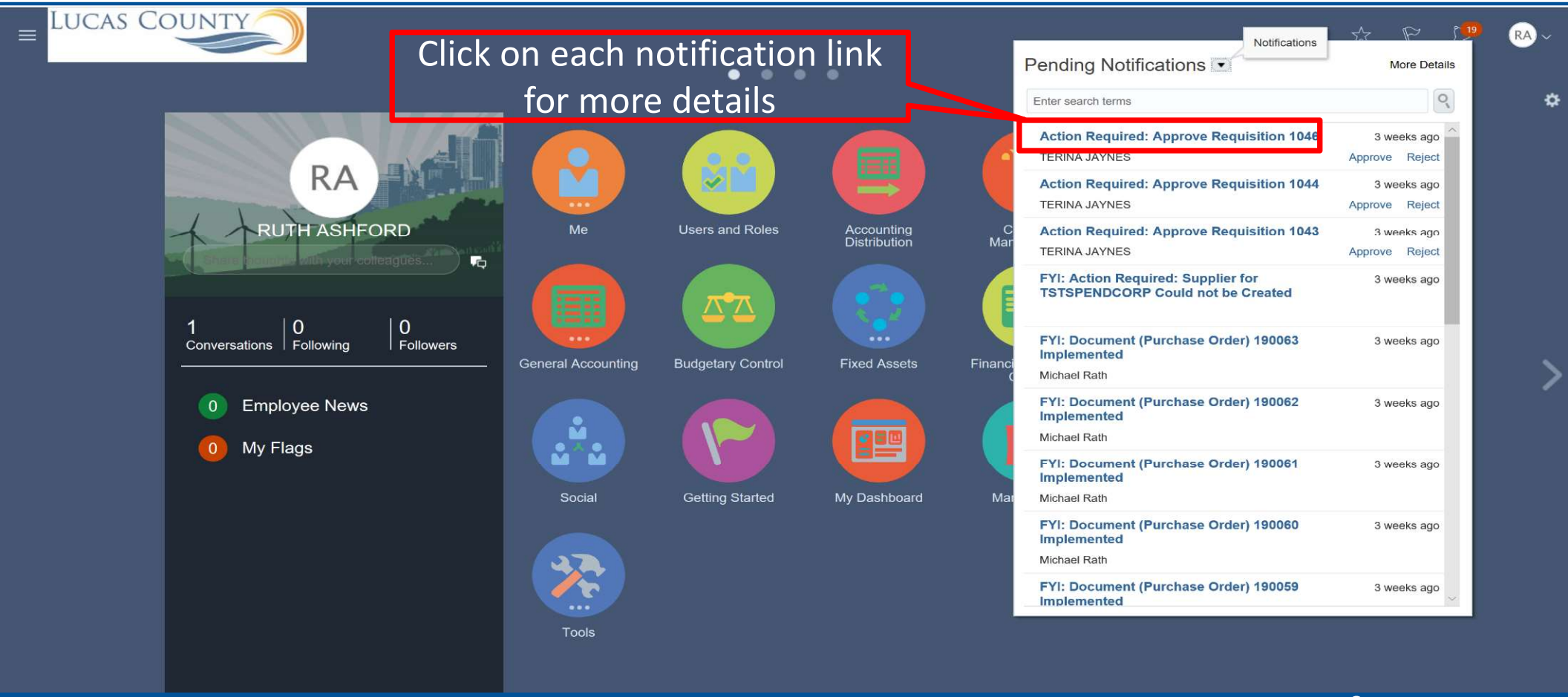
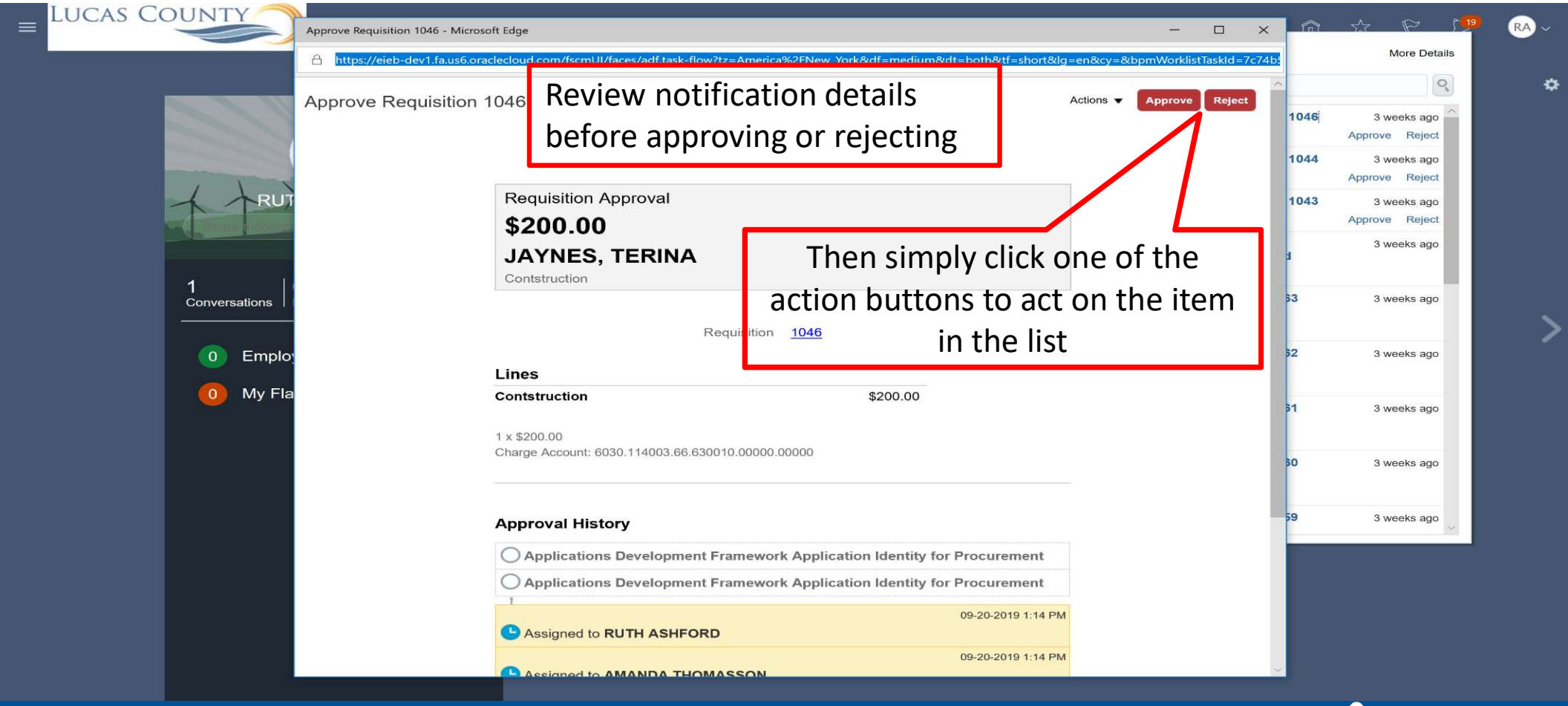
Respond to Notifications in the Worklist - Approval Notifications



Respond to Notifications in the Worklist - Approval Notifications (Cont.)



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Enter Data in Forms

LUCAS COUNTY

Purchase Requisitions | Purchase Agreements | Purchase Orders | My Receipts | Negotiations | Catalogs | Suppliers

Overview | View Requisition Lines

Requisition Lines

Search

Procurement BU: Lucas County

** Requisitioning BU

** Requisition

** Buyer: ASHFORD, RUTH

Advanced | Manage Watchlist | Saved Search: All My Requisition Lines

** At least one is required

** Requester

** Deliver-to Location

Line Description

** Category Name

Search | Reset | Save...

Done

When complete, click Done

Some fields have no selection list, and are Free Form Text Fields. Key the data into those fields.

Search Results

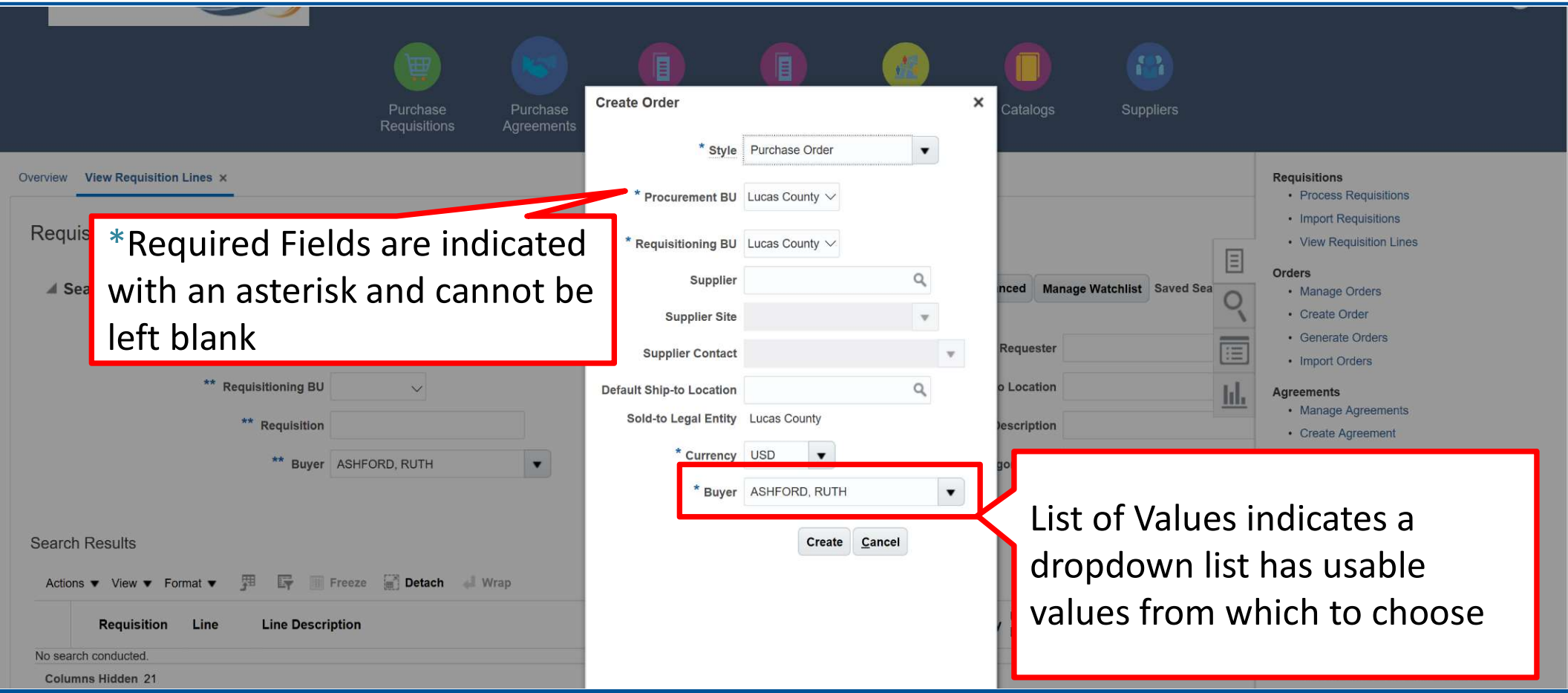
Actions | View | Format | Freeze | Detach | Wrap

Requisition	Line	Line Description	Requester	Quantity	UOM Name	Price	Amount	Currency	Order	Negotiation	Life Cycle

No search conducted.

Columns Hidden 21

Enter Data in Forms(Cont.)



*Required Fields are indicated with an asterisk and cannot be left blank

List of Values indicates a dropdown list has usable values from which to choose

Common Icons

Actions – select the action you want to take from any Actions menu. Actions can be dependent on the status of an item selected
View – Different ways to display information on a page or within a list
Insert – insert adds a row or column to a table
Edit – To edit an existing information, select the contact's name and click on the pencil icon
button
Create New page –
Attach – is used when the opportunity to attach supporting electronic file documentation is available in a page
Filter – allows you to filter on existing list or entry criteria to display *only* results matching the filter
Export – allows you to export the current information into another document or page
Detach – allows the user to drag the detachable menu to anywhere within the browser. When the mouse button is released, the menu stays on top of the application until the user closes it. Used when you expect to:

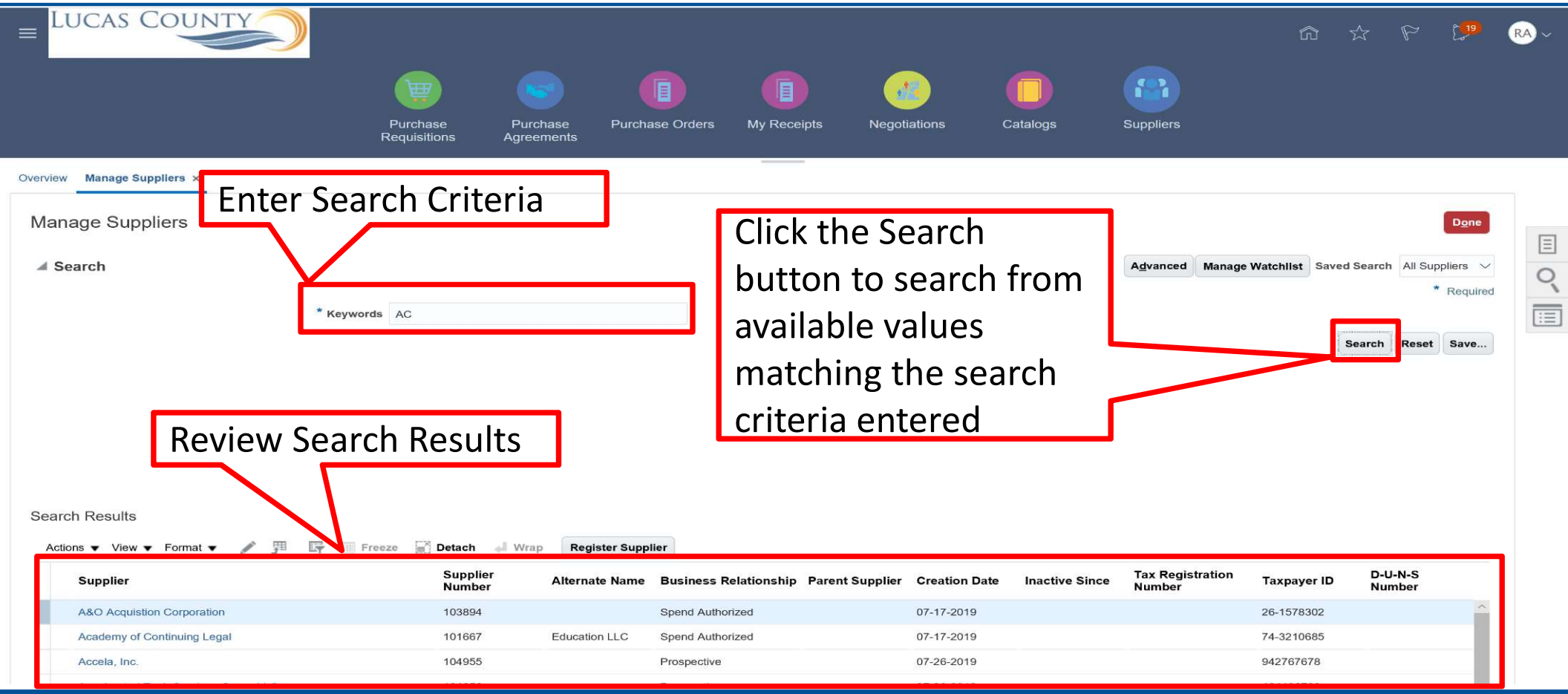
- Execute similar commands repeatedly on a page.
- Execute similar commands on different rows of data in a large table, tree table, or tree.
- View data in long and wide tables, tree tables, or trees. Users can choose which columns or branches to hide or display with a single click.
- Format data in long or wide tables, tree tables, or trees.

Common Icons (Cont.)

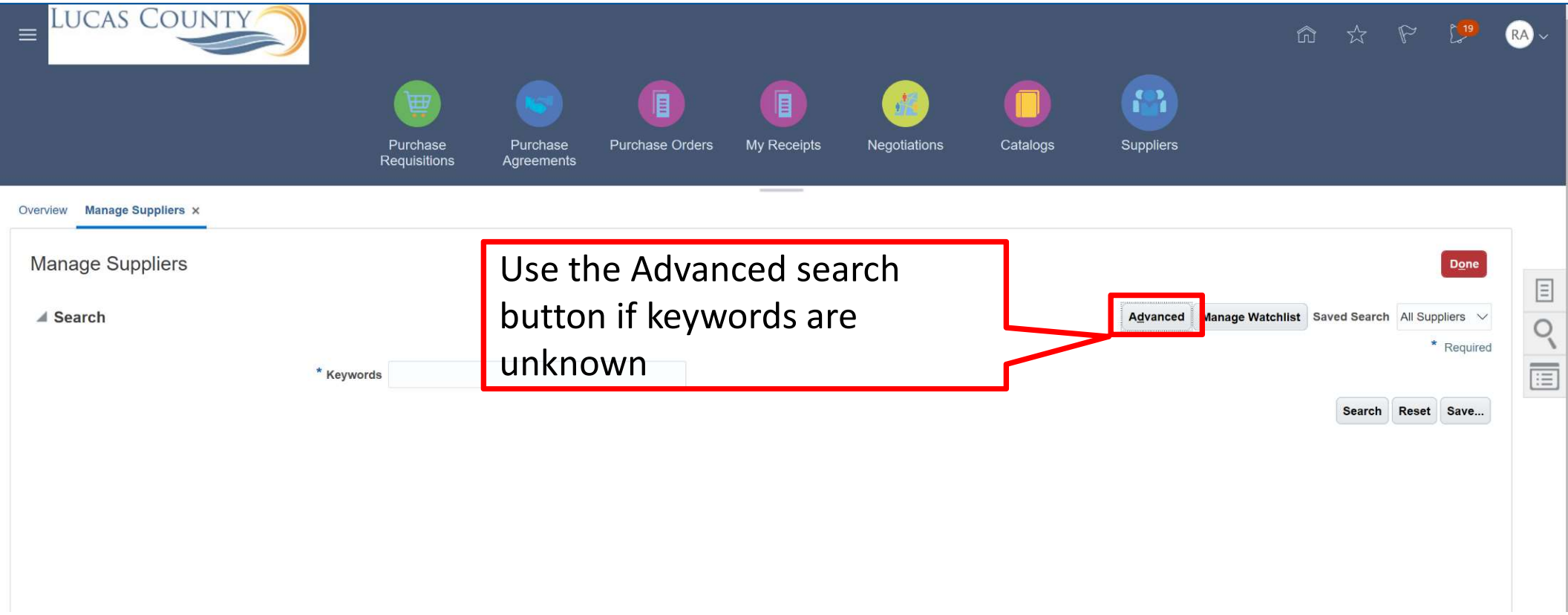
Additionally, you may see these icons on your pages.

Icon	Meaning
	Click this to minimize or maximize the left navigation panel.
	A folder that hasn't been shared with anyone.
	A folder that was shared with you or that you shared with others.
	Click or tap to download the item and store it for use on your local computer.
	Click or tap to open the sharing dialog, where you can create a link for a file or folder, or you can add members to a folder.
	Click or tap to mark something as a favorite.
	Shows that a conversation has been started about a file or folder. A conversation is a place where you can share comments with people about a particular item. Click or tap the icon to open the conversation.
	Shows that an item has been reserved by someone and can't be used.
	Click this to see menu options that might not fit on the menu bar.
	Click this to start a conversation or view a conversation that's already started.
	Click this to change how you view the items on the page, either in a list, a detailed view, or a grid.

Search for Data - Data Inquiry



Search for Data - Data Inquiry (Cont.)



Use the Advanced search button if keywords are unknown

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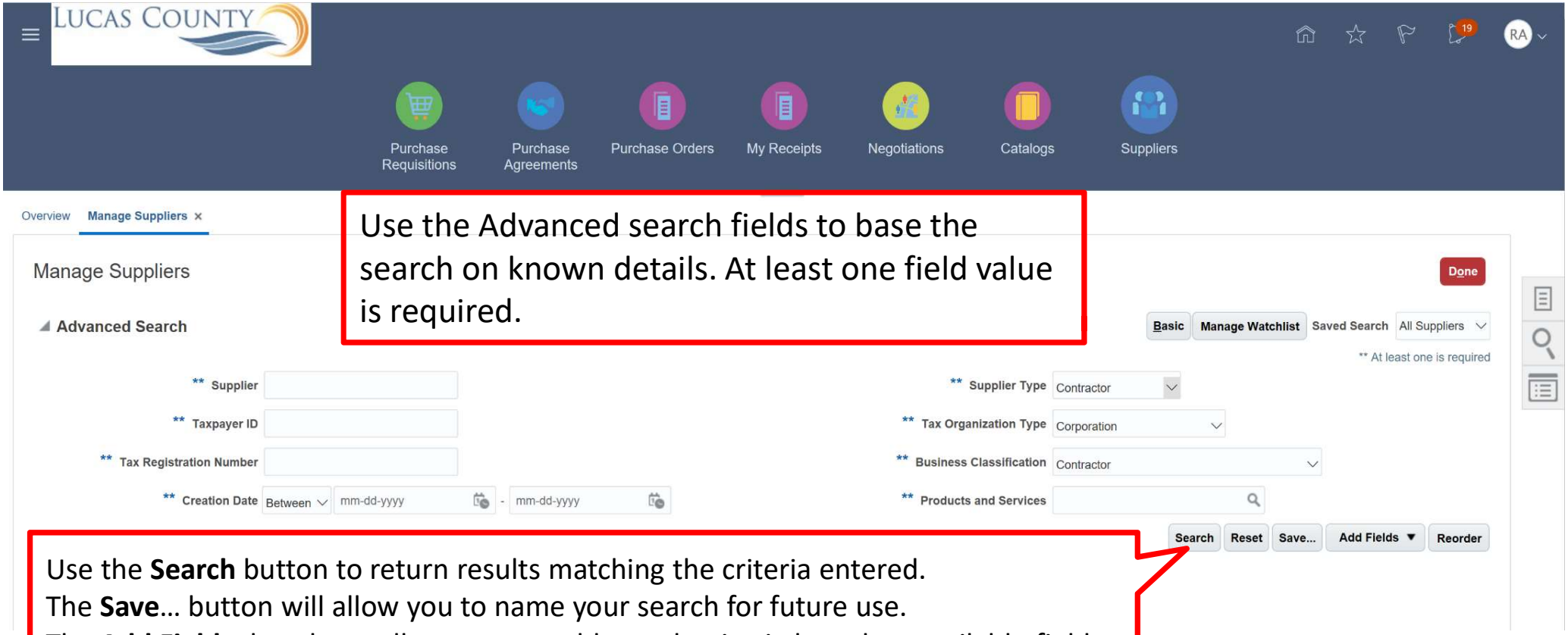
Search for Data - Data Inquiry (Cont.)



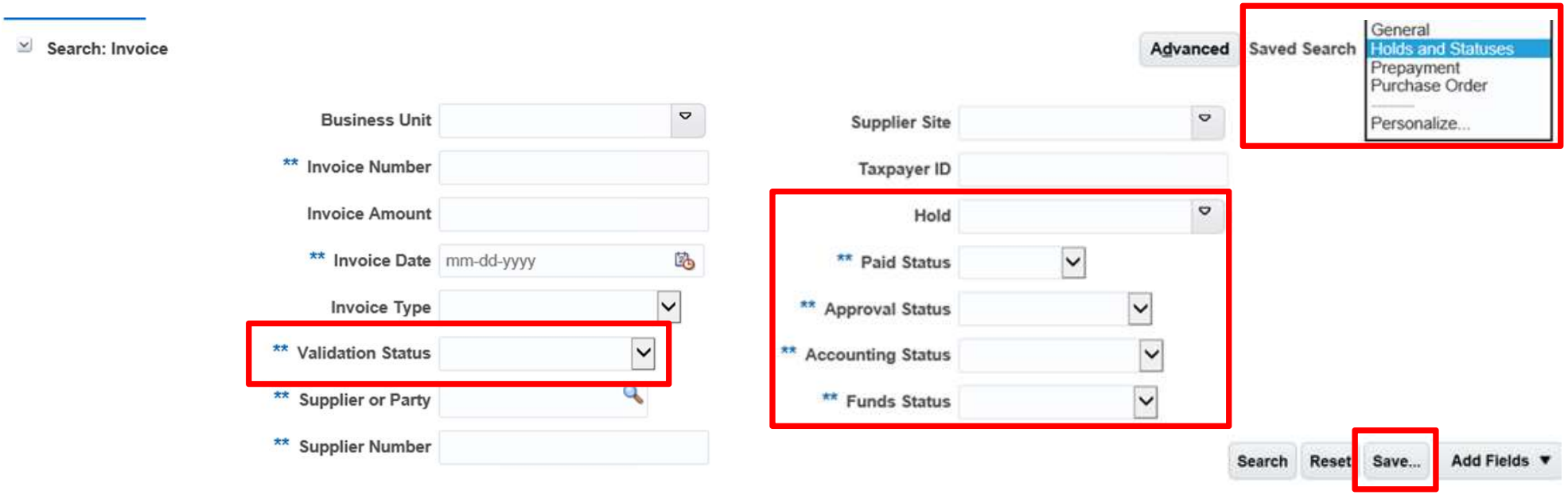
Use the Advanced search fields to base the search on known details. At least one field value is required.

Use the **Search** button to return results matching the criteria entered.
The **Save**… button will allow you to name your search for future use.
The **Add Fields** dropdown allows you to add search criteria based on available fields..

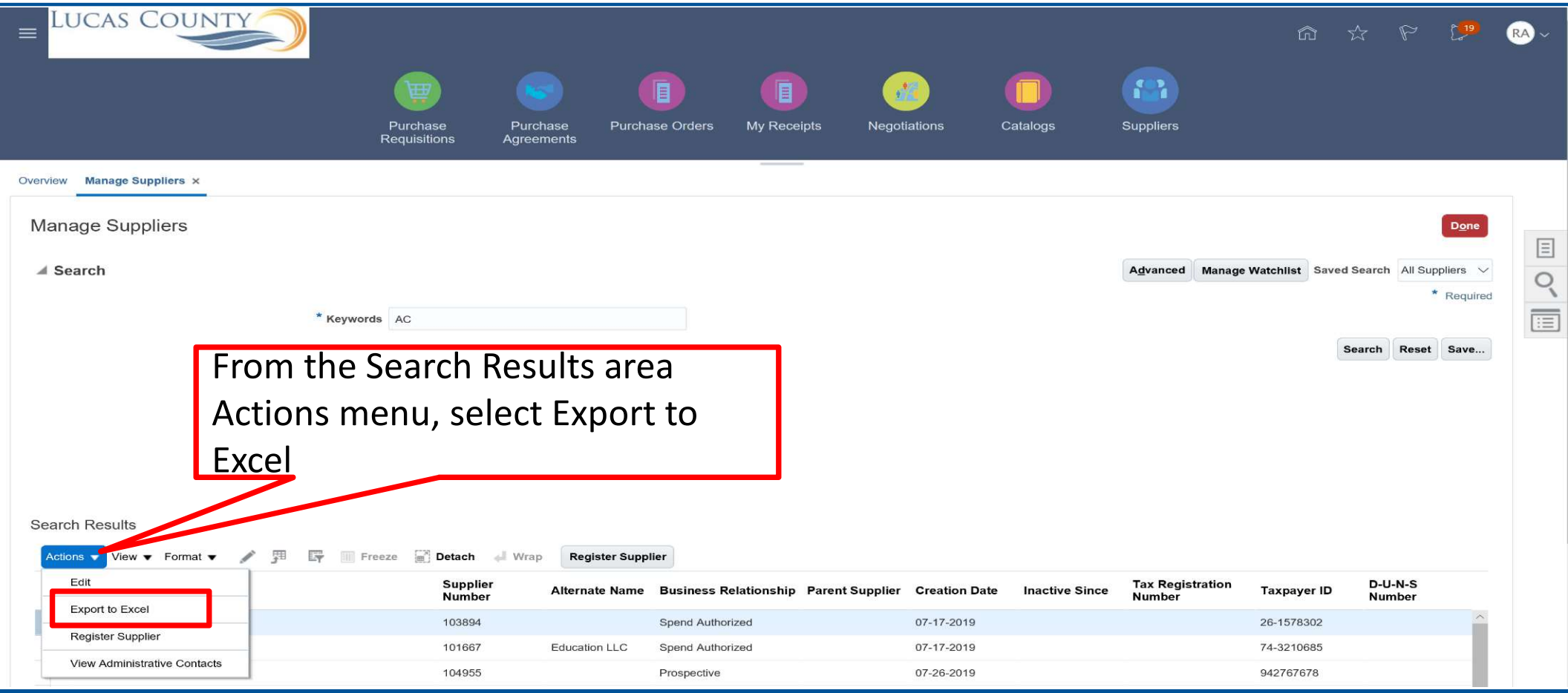
Save Frequent Searches

When searching for criteria that you will use frequently, after selecting/entering criteria, you can use the **Save** button to save the Search with a name that is logical to you.

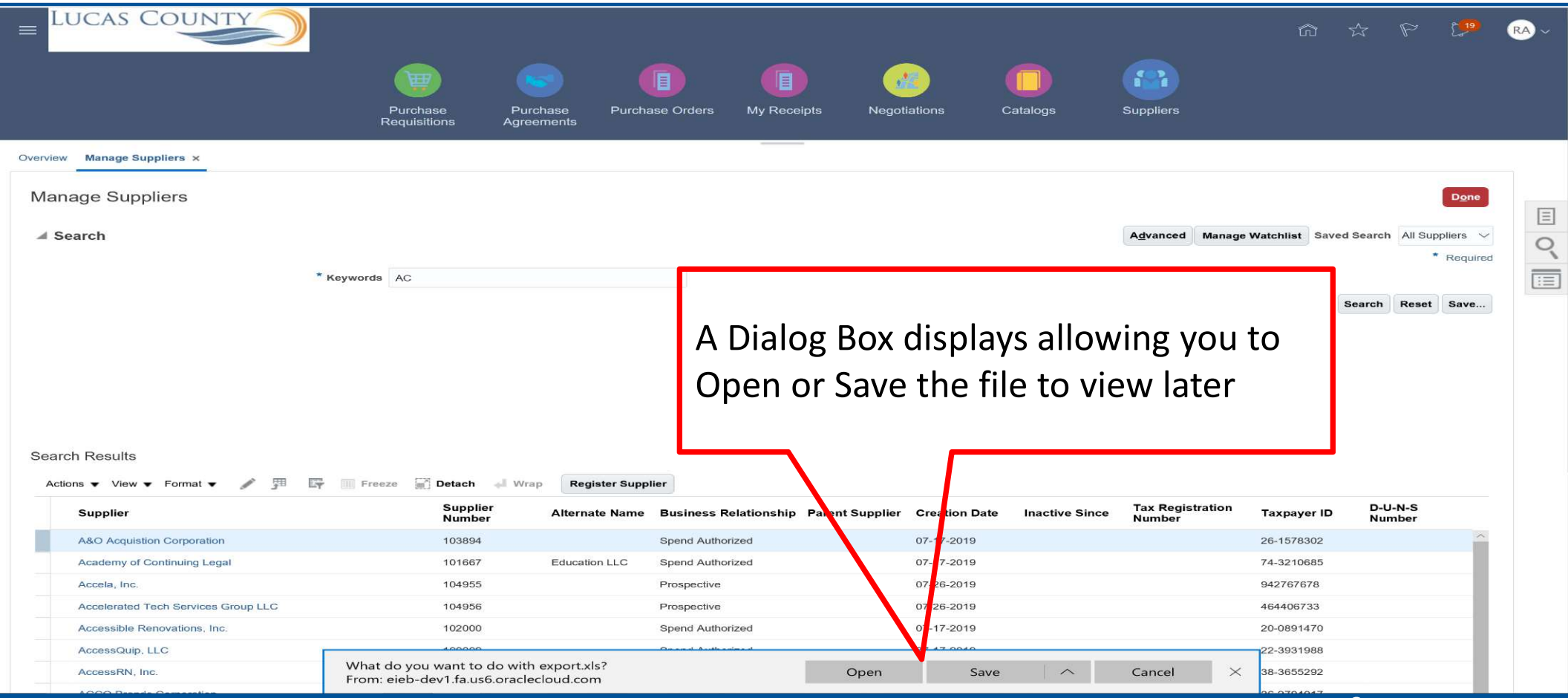
Going forward, you can use a **Saved Search**, where your named searches will display and the criteria you entered at save will automatically fill in as the basis of the search, saving you time.



Export Search Results to Excel

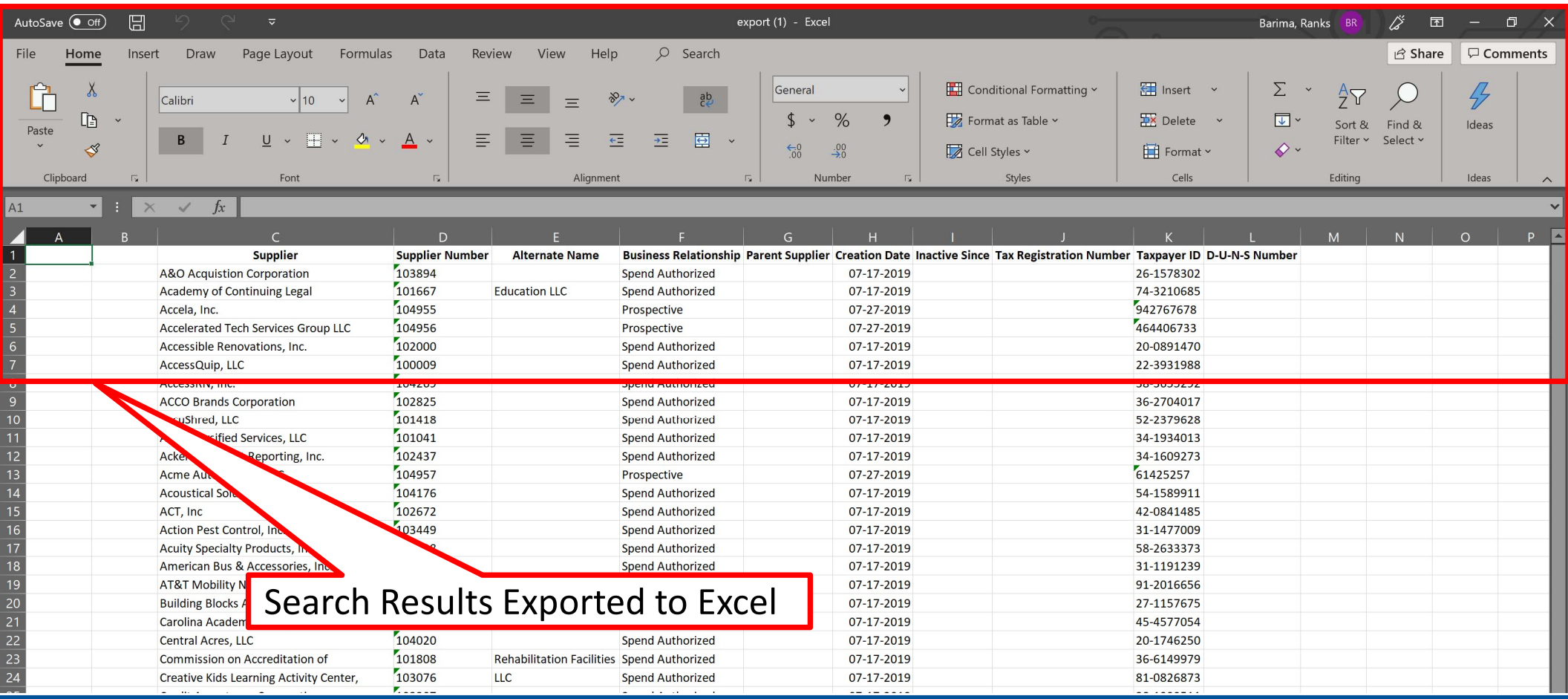


Export Search Results to Excel (Cont.)



A Dialog Box displays allowing you to Open or Save the file to view later

Export Search Results to Excel (Cont.)



Supplier	Supplier Number	Alternate Name	Business Relationship	Parent Supplier	Creation Date	Inactive Since	Tax Registration Number	Taxpayer ID	D-U-N-S Number
A&O Acquistion Corporation	103894		Spend Authorized		07-17-2019			26-1578302	
Academy of Continuing Legal	101667	Education LLC	Spend Authorized		07-17-2019			74-3210685	
Accela, Inc.	104955		Prospective		07-27-2019			942767678	
Accelerated Tech Services Group LLC	104956		Prospective		07-27-2019			464406733	
Accessible Renovations, Inc.	102000		Spend Authorized		07-17-2019			20-0891470	
AccessQuip, LLC	100009		Spend Authorized		07-17-2019			22-3931988	
ACCO Brands Corporation	102825		Spend Authorized		07-17-2019			36-2704017	
uShred, LLC	101418		Spend Authorized		07-17-2019			52-2379628	
ified Services, LLC	101041		Spend Authorized		07-17-2019			34-1934013	
Reporting, Inc.	102437		Spend Authorized		07-17-2019			34-1609273	
	104957		Prospective		07-27-2019			61425257	
	104176		Spend Authorized		07-17-2019			54-1589911	
ACT, Inc	102672		Spend Authorized		07-17-2019			42-0841485	
	103449		Spend Authorized		07-17-2019			31-1477009	
			Spend Authorized		07-17-2019			58-2633373	
			Spend Authorized		07-17-2019			31-1191239	
					07-17-2019			91-2016656	
					07-17-2019			27-1157675	
					07-17-2019			45-4577054	
Central Acres, LLC	104020		Spend Authorized		07-17-2019			20-1746250	
Commission on Accreditation of	101808	Rehabilitation Facilities	Spend Authorized		07-17-2019			36-6149979	
Creative Kids Learning Activity Center,	103076	LLC	Spend Authorized		07-17-2019			81-0826873	

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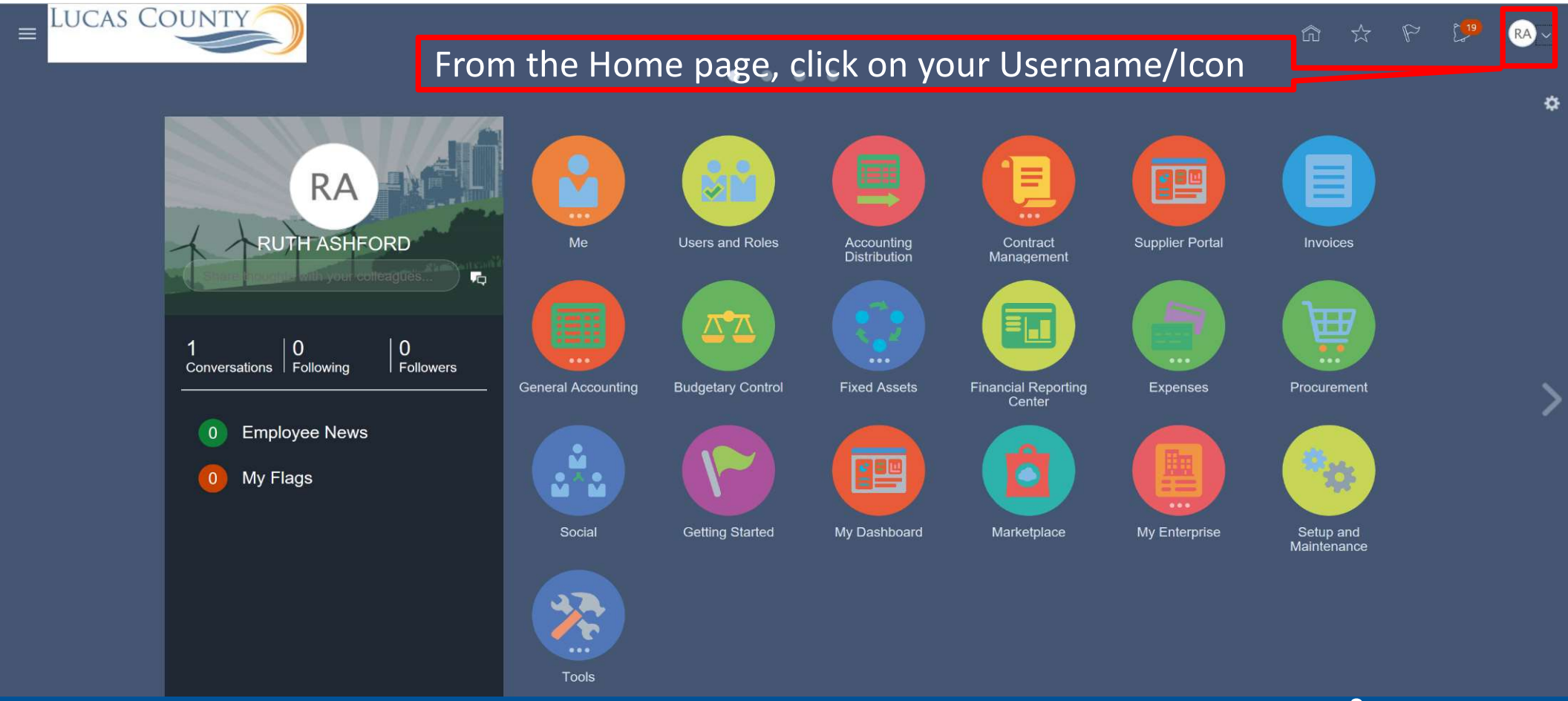
Use Application Help



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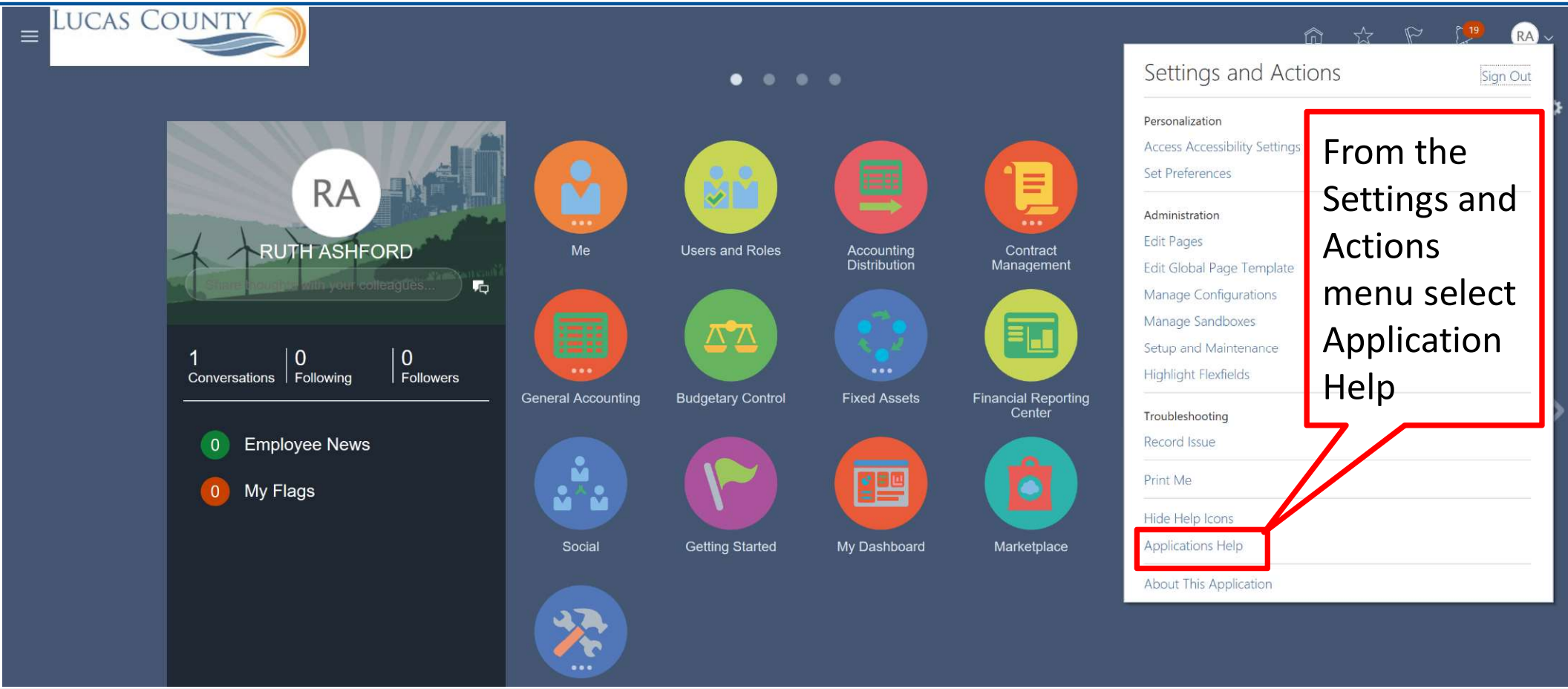
Use Application Help (Cont.)



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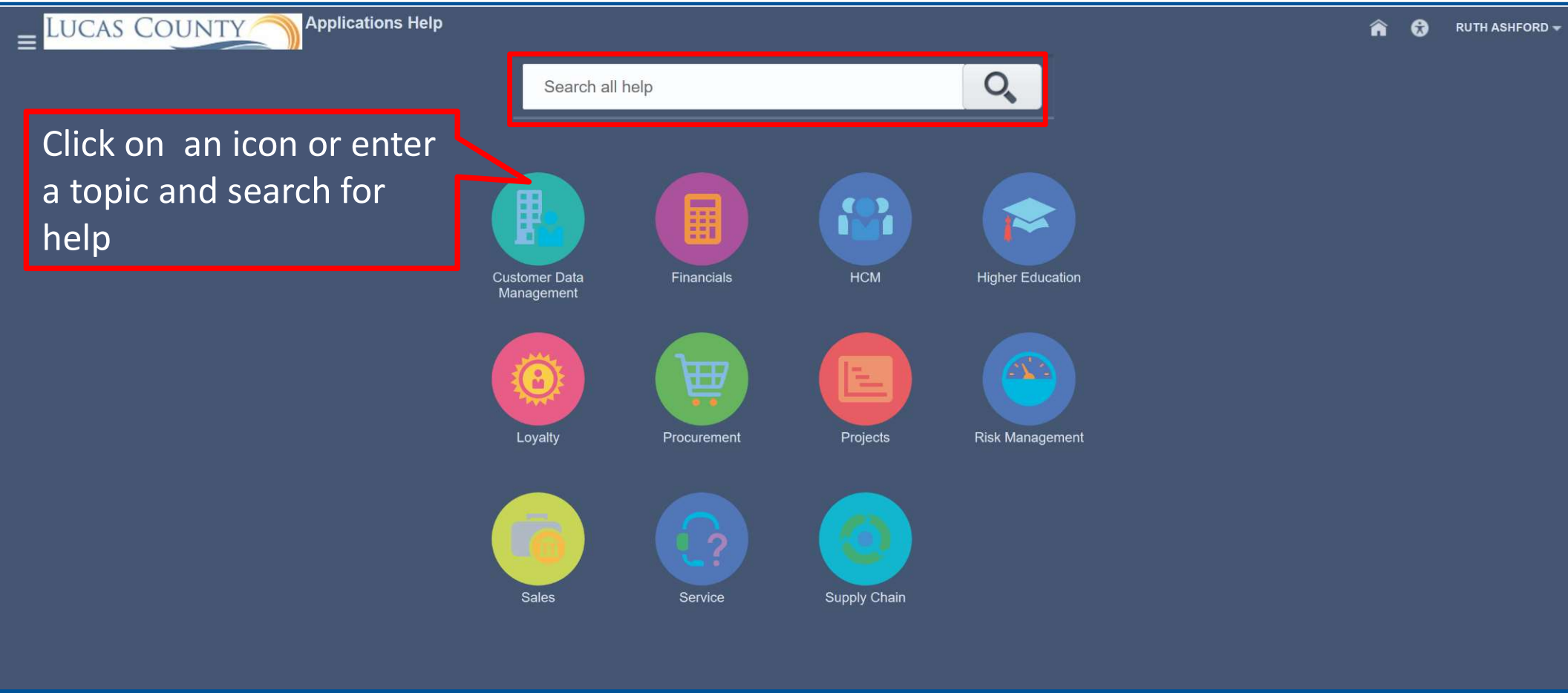
Application Help (Cont.)



Click on an icon or enter a topic and search for help

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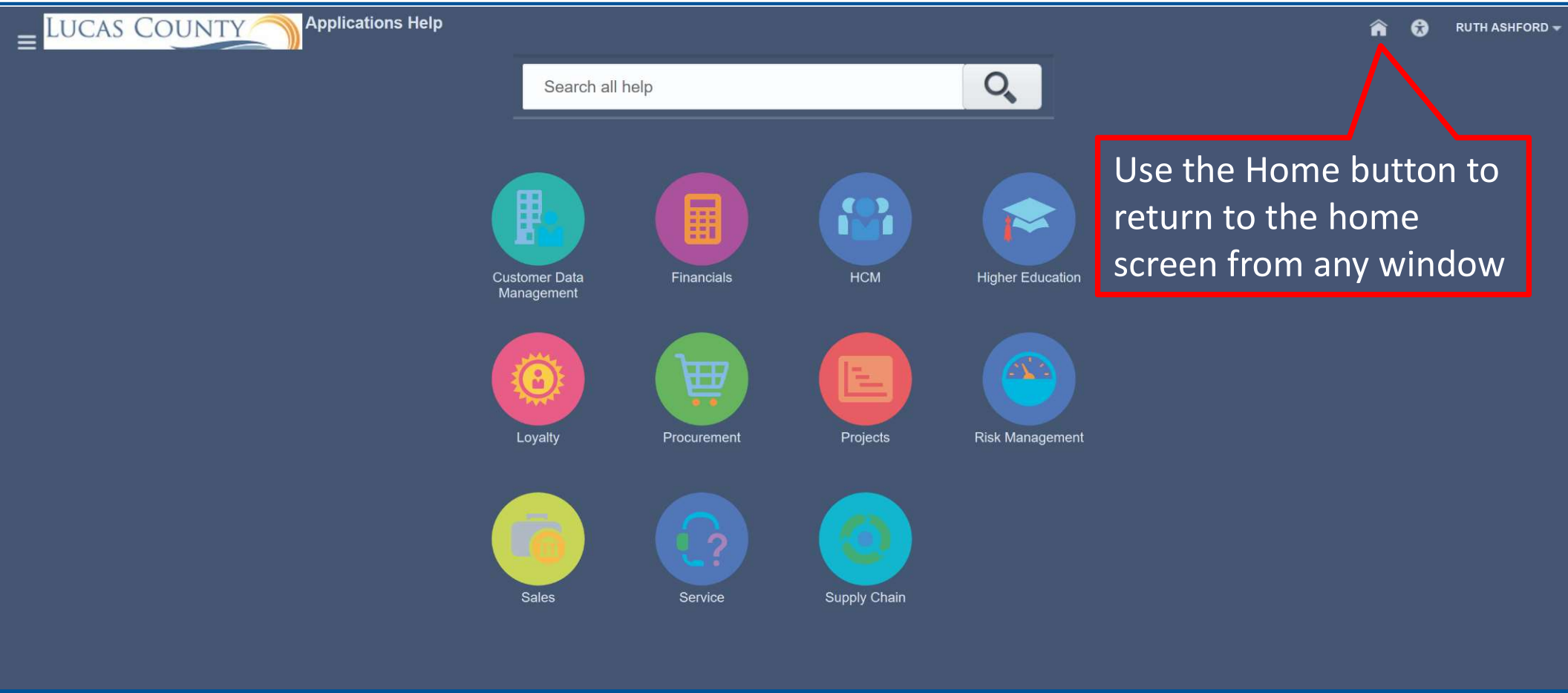
Application Help (Cont.)



Use the Home button to return to the home screen from any window

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Questions and Demonstration