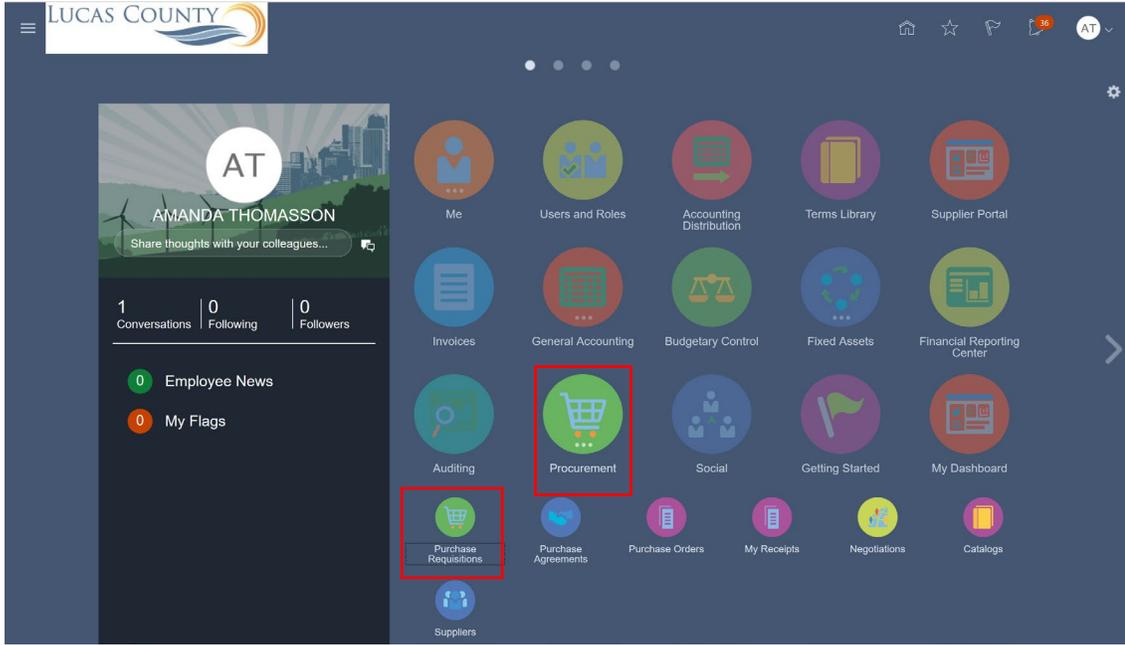


Create Requisition for Goods Referencing a CPA

Audience: Requesters, Buyers, Contract Administrators

Purpose: You create contract purchase agreements with your suppliers to agree on specific terms and conditions without indicating the goods and services that you will be purchasing. A contract purchase agreement (CPA) is an agreement between you and a supplier for unspecified goods or services. Standard Purchase Orders can be issued that reference the contract during its effective dates. This job aid assist with creation of a requisition for goods sourced from a Contract Purchase Agreement.

Step	Action
1	<p>Login to Oracle. Home Page -> Procurement -> Purchase Requisitions</p>  <p>The screenshot shows the Oracle Home Page for user AMANDA THOMASSON. The 'Procurement' icon, which features a shopping cart, is highlighted with a red box. Below it, the 'Purchase Requisitions' icon is also highlighted with a red box. Other icons include Me, Users and Roles, Accounting Distribution, Terms Library, Supplier Portal, Invoices, General Accounting, Budgetary Control, Fixed Assets, Financial Reporting Center, Auditing, Social, Getting Started, My Dashboard, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers.</p>
2	<p>Under Request Forms, select Contract Purchase – Goods.</p>

	<div style="border: 1px solid gray; padding: 10px;"> <h3 style="margin: 0;">Request Forms</h3> <ul style="list-style-type: none"> • Contract Purchase - Goods • Contract Purchase -Services </div>										
3	Click in the Item Description field.										
4	Enter the Item Description information into the Item Description field.										
5	Click in the Category Name search icon.										
6	Enter information into the Category description field and click the Search button.										
7	Select category from the Category list and click OK .										
	<p>The screenshot shows a dialog box titled "Search and Select: Category Name". It has a search bar with "Construction" entered in the "Description" field. Below the search bar is a table with the following data:</p> <table border="1"> <thead> <tr> <th>Category Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>911</td> <td>CONSTRUCTION AND UTILITIES, HIGHER EDUCATION</td> </tr> <tr style="background-color: #e0f0ff;"> <td>912</td> <td>CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)</td> </tr> <tr> <td>913</td> <td>CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)</td> </tr> <tr> <td>914</td> <td>CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)</td> </tr> </tbody> </table> <p>Buttons for "Search", "Reset", "OK", and "Cancel" are visible. A red arrow points to the "Search" button, and another red arrow points to the "OK" button.</p>	Category Name	Description	911	CONSTRUCTION AND UTILITIES, HIGHER EDUCATION	912	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)	913	CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)	914	CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)
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8	Enter a Quantity .										
9	Click in the UOM Name field and select Each.										
10	Click in the Price field and enter a price.										
11	Click in the Currency field. Currency should default to USD.										
12	Click in the Agreement field and enter the Agreement Number information or use the Search function to find the Agreement.										
13	The Agreement will display. Select the line for the Agreement and click the Ok button.										

Search and Select: Agreement

Search Advanced

** Agreement ** At least one is required

** Supplier

** Supplier Site

Search Reset

Agreement	Supplier	Supplier Site	Description
10	Grainger	MAIN	Various Supplies

OK Cancel

14 Click the **Add to Cart** button.

15 Click the **Shopping Cart Link** and then click the **Review** button.

Building Materials
\$1,000.00 Case of 10
1
✕

Total \$1,000.00

16 Select Y/N option for ***State Contract - If yes, please insert Contract Number.**

Justification

* State Contract - If yes, please insert Contract Number

State Contract Number

* Sole Source - If yes please attach proof of Sole Source

* Resolution Attached

* Will Services be performed on Lucas County property?

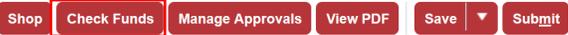
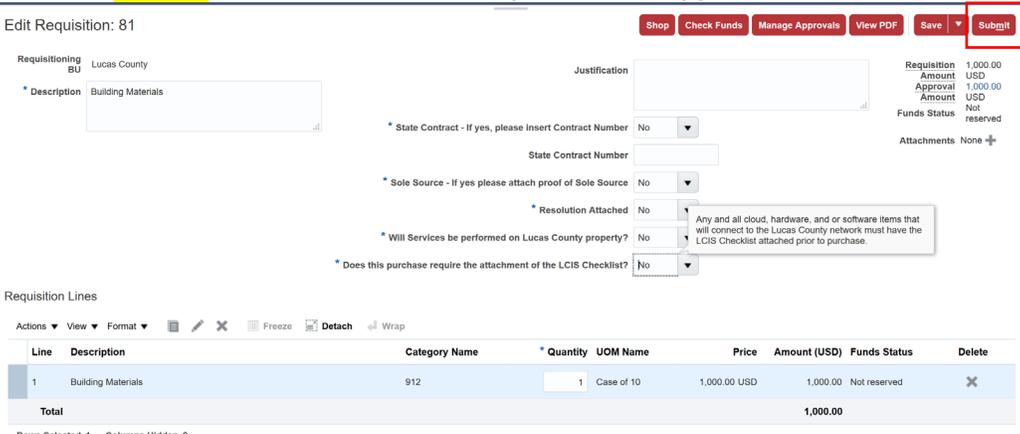
* Does this purchase require the attachment of the LCIS Checklist?

Any and all cloud, hardware, and or software items that will connect to the Lucas County network must have the LCIS Checklist attached prior to purchase.

Requisition Amount 1,000.00 USD
 Approval Amount 1,000.00 USD
 Funds Status Not reserved
 Attachments None +

17 Enter if 'Y' is selected enter a number in the **State Contract Number** field.

18 Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").

19	Select Y/N *Resolution Attached. (If yes attach resolution).
20	Select Y/N *Will Services be performed on Lucas County property?
21	Select Y/N *Does this purchase require the attachment of the LCIS Checklist? (Any and all cloud, hardware, and or software items that will connect to the Lucas County network must have the LCIS Checklist attached prior to purchase.)
22	Click the Check Funds button to verify budgeting. 
23	Click the OK button.
24	Click the Submit button to route the requisition for approval. 
25	A confirmation message will display. Click the OK button.