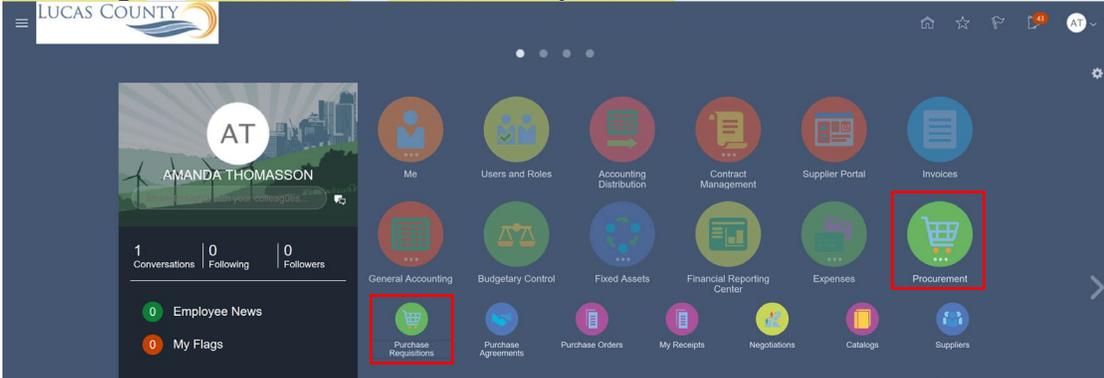
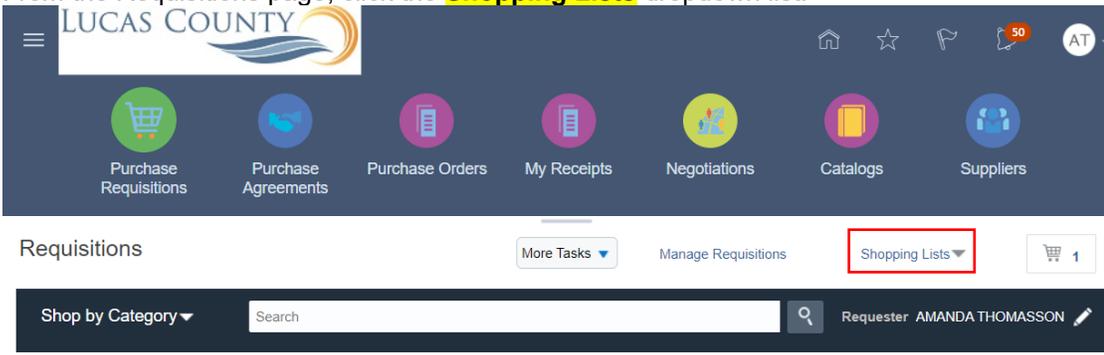


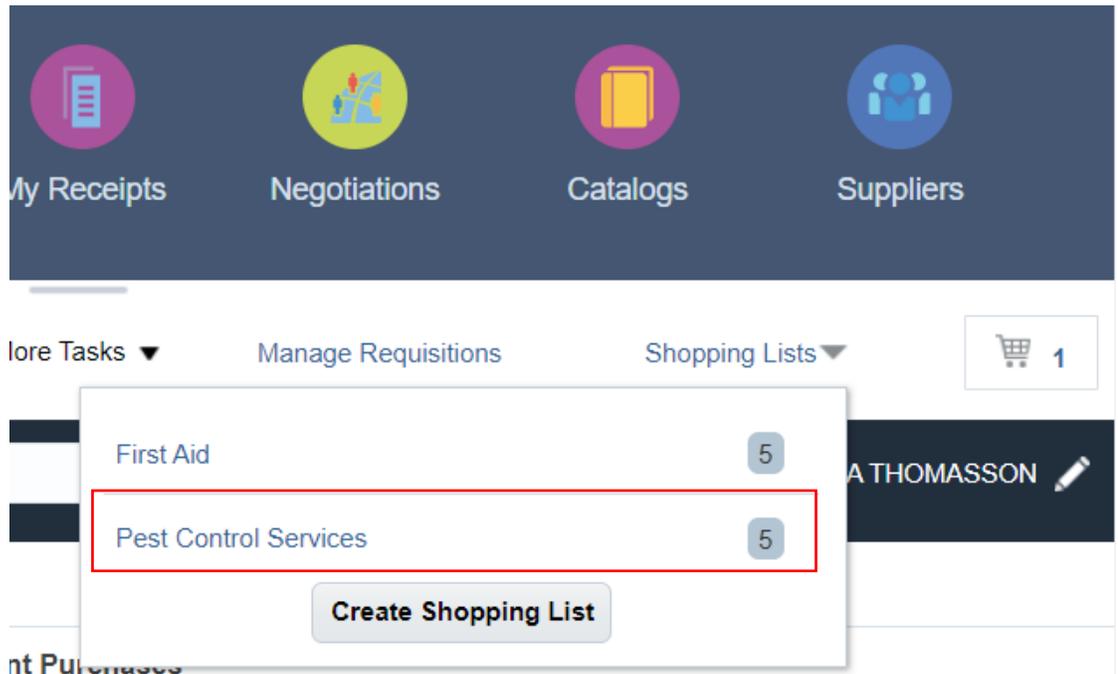
Create Requisition from Shopping List

Audience: Requester, Buyer

Purpose: After items or services have been saved to a shopping list in Oracle, you can quickly use that list to create future requisitions. You can select items or services from the list, adjust any quantities, add additional items if need be, or submit as is.

This job aid will assist you in creating a requisition from a saved shopping list in Oracle.

| Step | Action |
|------|---|
| 1 | <p>Log into Oracle. Home Page -> Procurement -> Purchase Requisitions</p>  <p>The screenshot shows the Oracle Home Page for user AMANDA THOMASSON. A grid of application icons is displayed. The 'Procurement' icon, which features a shopping cart, is highlighted with a red rectangular box. Other icons include Me, Users and Roles, Accounting Distribution, Contract Management, Supplier Portal, Invoices, General Accounting, Budgetary Control, Fixed Assets, Financial Reporting Center, Expenses, Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers.</p> |
| 2 | <p>From the Requisitions page, click the Shopping Lists dropdown list.</p>  <p>The screenshot shows the Oracle Requisitions page. At the top, there are navigation icons for Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers. Below this is a 'Requisitions' section with buttons for 'More Tasks', 'Manage Requisitions', and 'Shopping Lists'. The 'Shopping Lists' button has a dropdown arrow and is highlighted with a red rectangular box. At the bottom, there is a search bar with 'Shop by Category' and 'Search' fields, and a 'Requester AMANDA THOMASSON' field.</p> |
| 3 | <p>Any lists you have personally created will display. The list name and number of items/services are included in this display.</p> |



Click the **list name** to select the one you wish to use or review.

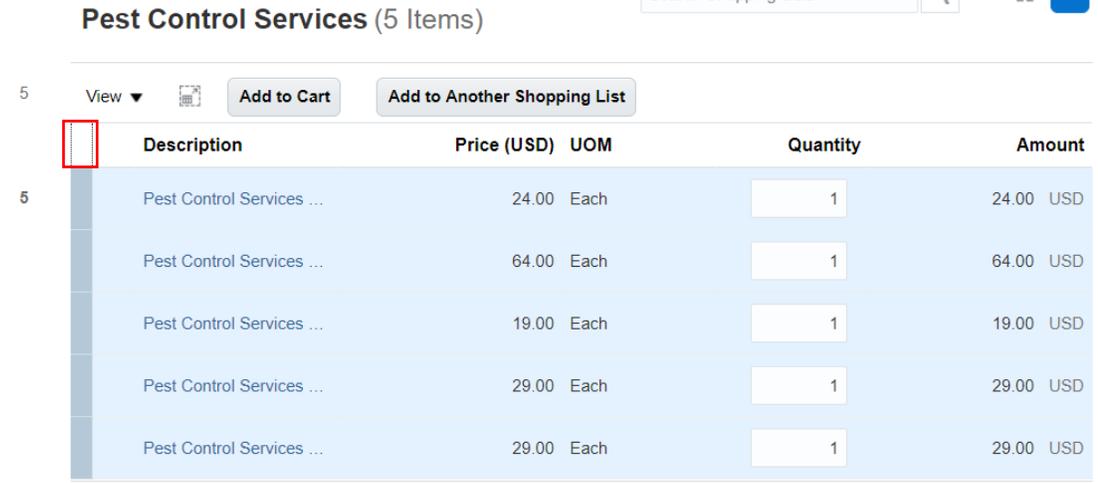
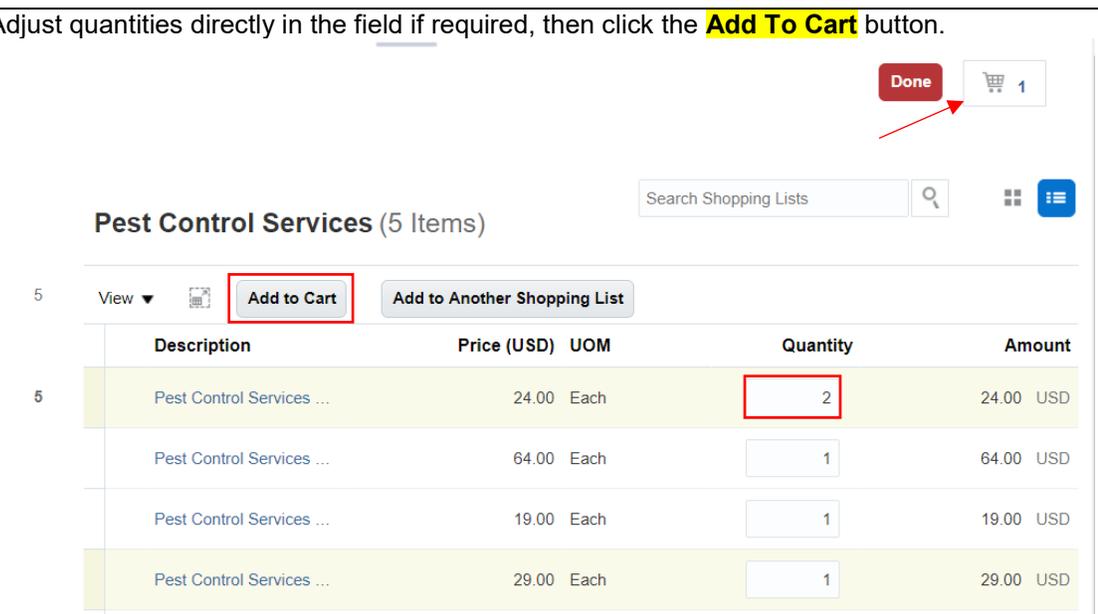
4 Items in the list display. *Control/click* in the selection bar to choose the individual items/services you wish to add to your requisition.

Pest Control Services (5 Items)

5 View Add to Cart Add to Another Shopping List

| | Description | Price (USD) | UOM | Quantity | Amount |
|---|---------------------------|-------------|------|--------------------------------|-----------|
| 5 | Pest Control Services ... | 24.00 | Each | <input type="text" value="1"/> | 24.00 USD |
| | Pest Control Services ... | 64.00 | Each | <input type="text" value="1"/> | 64.00 USD |
| | Pest Control Services ... | 19.00 | Each | <input type="text" value="1"/> | 19.00 USD |
| | Pest Control Services ... | 29.00 | Each | <input type="text" value="1"/> | 29.00 USD |
| | Pest Control Services ... | 29.00 | Each | <input type="text" value="1"/> | 29.00 USD |

Alternatively, to select all items/services click the selection bar to the left of **Description**.

| |  <p>Pest Control Services (5 Items)</p> <p>5 View Add to Cart Add to Another Shopping List</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Price (USD)</th> <th>UOM</th> <th>Quantity</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Pest Control Services ...</td> <td>24.00</td> <td>Each</td> <td>1</td> <td>24.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>64.00</td> <td>Each</td> <td>1</td> <td>64.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>19.00</td> <td>Each</td> <td>1</td> <td>19.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>29.00</td> <td>Each</td> <td>1</td> <td>29.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>29.00</td> <td>Each</td> <td>1</td> <td>29.00 USD</td> </tr> </tbody> </table> | Description | Price (USD) | UOM | Quantity | Amount | Pest Control Services ... | 24.00 | Each | 1 | 24.00 USD | Pest Control Services ... | 64.00 | Each | 1 | 64.00 USD | Pest Control Services ... | 19.00 | Each | 1 | 19.00 USD | Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD | Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD |
|---------------------------|---|-------------|-------------|-----------|----------|--------|---------------------------|-------|------|---|-----------|---------------------------|-------|------|---|-----------|---------------------------|-------|------|---|-----------|---------------------------|-------|------|---|-----------|---------------------------|-------|------|---|-----------|
| Description | Price (USD) | UOM | Quantity | Amount | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 24.00 | Each | 1 | 24.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 64.00 | Each | 1 | 64.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 19.00 | Each | 1 | 19.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 5 | <p>Adjust quantities directly in the field if required, then click the Add To Cart button.</p>  <p>Pest Control Services (5 Items)</p> <p>5 View Add to Cart Add to Another Shopping List</p> <table border="1"> <thead> <tr> <th>Description</th> <th>Price (USD)</th> <th>UOM</th> <th>Quantity</th> <th>Amount</th> </tr> </thead> <tbody> <tr> <td>Pest Control Services ...</td> <td>24.00</td> <td>Each</td> <td>2</td> <td>24.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>64.00</td> <td>Each</td> <td>1</td> <td>64.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>19.00</td> <td>Each</td> <td>1</td> <td>19.00 USD</td> </tr> <tr> <td>Pest Control Services ...</td> <td>29.00</td> <td>Each</td> <td>1</td> <td>29.00 USD</td> </tr> </tbody> </table> | Description | Price (USD) | UOM | Quantity | Amount | Pest Control Services ... | 24.00 | Each | 2 | 24.00 USD | Pest Control Services ... | 64.00 | Each | 1 | 64.00 USD | Pest Control Services ... | 19.00 | Each | 1 | 19.00 USD | Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD | | | | | |
| Description | Price (USD) | UOM | Quantity | Amount | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 24.00 | Each | 2 | 24.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 64.00 | Each | 1 | 64.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 19.00 | Each | 1 | 19.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Pest Control Services ... | 29.00 | Each | 1 | 29.00 USD | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 6 | <p>Note: The number on the cart will update based on the separate items/services added, not the quantities of items/services.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | Quantity | Amount |
|--|----------|-----------|
| | 2 | 48.00 USD |
| | 1 | 64.00 USD |
| | 1 | 19.00 USD |
| | 1 | 29.00 USD |

7 Click the **Shopping Cart** icon. Items display in a mini popup. Although you can remove unwanted items here using the **X**, it is advisable to perform a Review of the requisition as a whole prior to submission. Click the **Review** button.

Done

| | | | |
|----------------------|---|------|--|
| | Pest Control Services - Emergency Service -Solid Waste Management District 1011 Matzinger Rd. Toledo \$24.00 Each | 2.00 | |
| | Pest Control Services -Bi- Monthly -Sixth District Court of Appeals One Constitution Ave. Toledo \$29.00 Each | 1.00 | |
| | XYZ Electrical Fixture \$10.00 Each | 1.00 | |
| Total \$87.00 | | | |

Review **Submit**

8 The **Edit Requisition** page displays details of the requisition thus far.

| | <p>Edit Requisition: 1062</p> <p>Shop Check Funds Manage Approvals View PDF Save Submit</p> <p>Requisitioning BU Lucas County Justification</p> <p>* Description XYZ Electrical Fixture</p> <p>* State Contract - If yes, please insert Contract Number State Contract Number</p> <p>* Sole Source - If yes please attach proof of Sole Source</p> <p>* Resolution Attached</p> <p>* Will Services be performed on Lucas County property?</p> <p>* Does this purchase require the attachment of the LCIS Checklist?</p> <p>Requisition Lines</p> <p>Actions View Format Freeze Detach Wrap</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>* Quantity</th> <th>UOM Name</th> <th>* Price</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>XYZ Electrical Fixtu</td> <td>285</td> <td>1</td> <td>Each</td> <td>10.00 USD</td> <td>10.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td>2</td> <td>Pest Control Servic</td> <td>675</td> <td>1</td> <td>Each</td> <td>29.00 USD</td> <td>29.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td>3</td> <td>Pest Control Servic</td> <td>675</td> <td>2</td> <td>Each</td> <td>24.00 USD</td> <td>48.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6">Total</td> <td>87.00</td> <td></td> <td></td> </tr> </tbody> </table> <p>Edit the requisition description to something that makes sense to you. Answer required questions. Adjust Quantities if required, or delete unwanted items using the X.</p> <p>Click the OK button for the confirmation message.</p> <p>9 Select Y/N option for *State Contract. Note: If yes, please insert Contract Number.</p> <p>10 Select Y/N *Sole Source Note: If yes please attach proof of Sole Source.</p> <p>11 Select Y/N *Resolution Attached.</p> <p>12 Select Y/N *Will Services be performed on Lucas County property?</p> <p>13 Select Y/N *Does this purchase require the attachment of the LCIS Checklist? Note: If yes, please attach using the + icon in the Attachments section below in the window.</p> <p>Notes and Attachments</p> <p>Note to Supplier Attachments None +</p> | Line | Description | Category Name | * Quantity | UOM Name | * Price | Amount (USD) | Funds Status | Delete | 1 | XYZ Electrical Fixtu | 285 | 1 | Each | 10.00 USD | 10.00 | Not reserved | X | 2 | Pest Control Servic | 675 | 1 | Each | 29.00 USD | 29.00 | Not reserved | X | 3 | Pest Control Servic | 675 | 2 | Each | 24.00 USD | 48.00 | Not reserved | X | Total | | | | | | 87.00 | | |
|--------------|--|---------------|-------------|---------------|------------|--------------|--------------|--------------|--------------|--------|---|----------------------|-----|---|------|-----------|-------|--------------|---|---|---------------------|-----|---|------|-----------|-------|--------------|---|---|---------------------|-----|---|------|-----------|-------|--------------|---|--------------|--|--|--|--|--|--------------|--|--|
| Line | Description | Category Name | * Quantity | UOM Name | * Price | Amount (USD) | Funds Status | Delete | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 | XYZ Electrical Fixtu | 285 | 1 | Each | 10.00 USD | 10.00 | Not reserved | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 | Pest Control Servic | 675 | 1 | Each | 29.00 USD | 29.00 | Not reserved | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 3 | Pest Control Servic | 675 | 2 | Each | 24.00 USD | 48.00 | Not reserved | X | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total | | | | | | 87.00 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 14 | <p>Click the Check Funds button located at the top of the window.</p> <p>Edit Requisition: 1163 Shop Check Funds Manage Approvals View PDF Save Submit</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 15 | <p>A message will display regarding failure or success of the funds check. Click the OK button to acknowledge.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 16 | <p>Click the Manage Approvals button to view the approvers.</p> <p>Manage Approvals View PDF Save Submit</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 17 | <p>Click the Back button.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 18 | <p>Click the Submit button.</p> | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |