

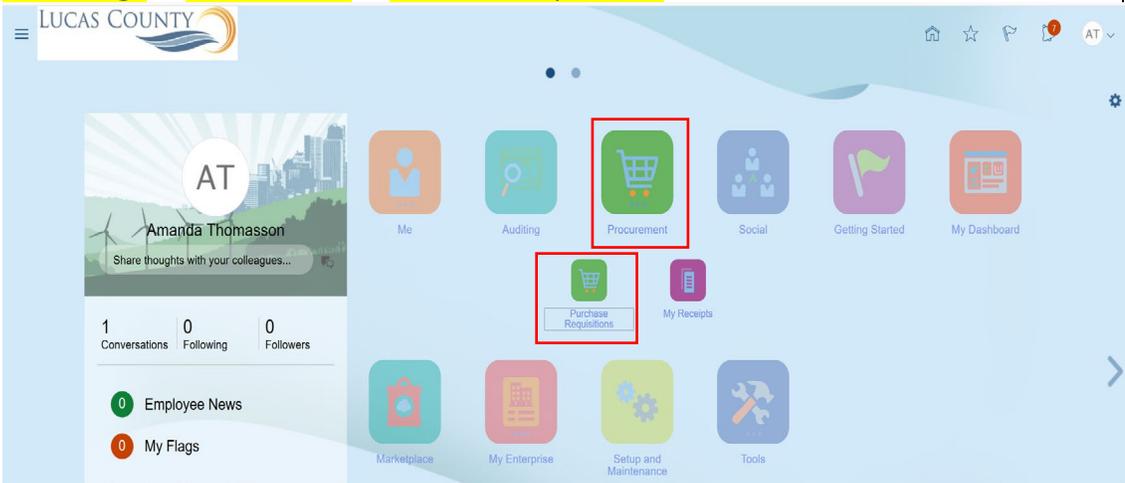
Search and Export Requisitions

Audience: Requesters

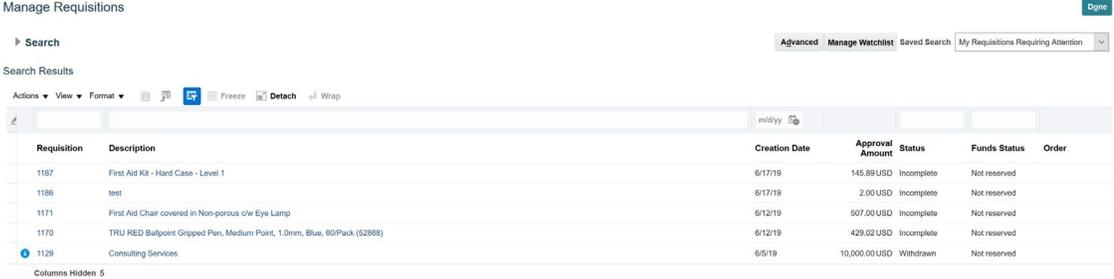
Purpose: Although the Procurement Business Unit that you specify narrows down the available requisition lines you can process, search is your primary tool to consolidate random requisition lines into a collection of just those you are interested in.

Basic search is accomplished by simply filling in a few of the provided fields. With advanced search, you can perform queries that require entries to find matches using a relationship other than just an equal to match as is done in a basic search. Optionally you can choose from the Saved Searches list that lets you save and reuse any frequently used set of search criteria.

On the Process Requisitions page, these saved searches appear as options in the Saved Search field. This job aid will assist you with conducting an advanced search, a saved search, and export.

Step	Action
1	<p>Log into Oracle. Home Page -> Procurement -> Purchase Requisitions</p> 
2	Click the Manage Requisitions link.
3	This is a delivered search that will be for all Requisitions that require attention. Click the Saved Search drop down.
4	<p>Select My Requisitions Requiring Attention from the list of options.</p> 

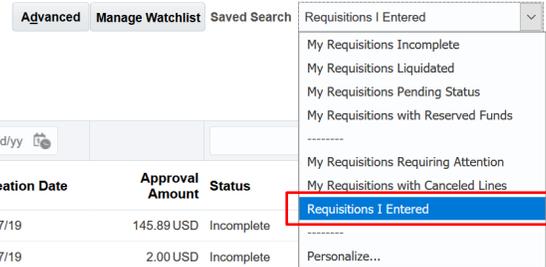
- 5 This will display requisitions with a **Status** equal to 'Incomplete' and or **Funds Status** 'Not Reserved'.



Manage Requisitions

Search Results

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1187	First Aid Kit - Hard Case - Level 1	6/17/19	145.89 USD	Incomplete	Not reserved	
1186	test	6/17/19	2.00 USD	Incomplete	Not reserved	
1171	First Aid Chair covered in Non-porous o/w Eye Lamp	6/12/19	507.00 USD	Incomplete	Not reserved	
1170	TRU RED Ballpoint Gripped Pen, Medium Point, 1.0mm, Blue, 60/Pack (52988)	6/12/19	429.02 USD	Incomplete	Not reserved	
1129	Consulting Services	6/5/19	10,000.00 USD	Withdrawn	Not reserved	
- 6 Click the Saved Search to select.

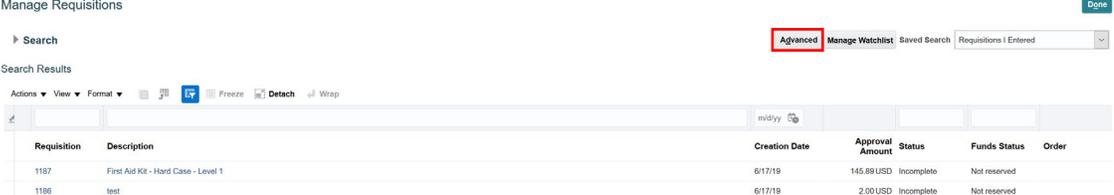


Advanced Manage Watchlist Saved Search

Requisitions I Entered

 - My Requisitions Incomplete
 - My Requisitions Liquidated
 - My Requisitions Pending Status
 - My Requisitions with Reserved Funds
 -
 - My Requisitions Requiring Attention
 - My Requisitions with Canceled Lines
 -
 - Requisitions I Entered
 -
 - Personalize...

Creation Date	Approval Amount	Status
7/19	145.89 USD	Incomplete
7/19	2.00 USD	Incomplete
- 7 Click the **Advanced** button.



Manage Requisitions

Advanced Manage Watchlist Saved Search

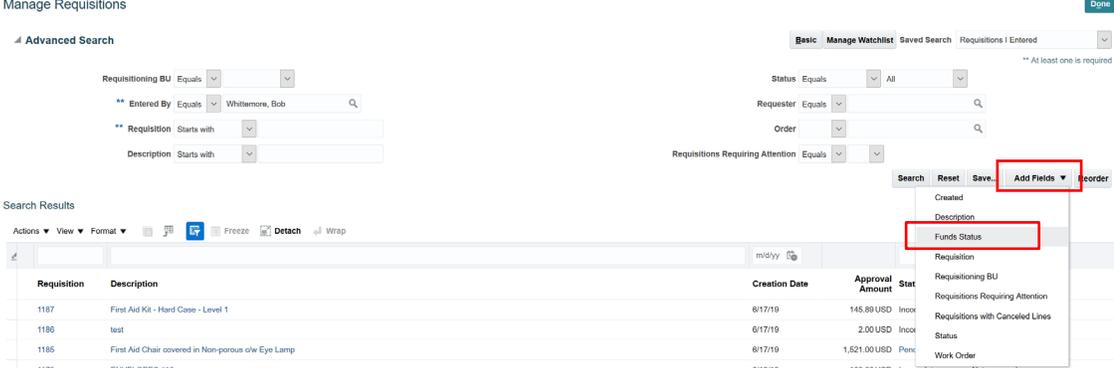
Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1187	First Aid Kit - Hard Case - Level 1	6/17/19	145.89 USD	Incomplete	Not reserved	
1186	test	6/17/19	2.00 USD	Incomplete	Not reserved	
- 8 Click the **Expand Advanced Search** button.



Manage Requisitions

Advanced Search

Expand Advanced Search
- 9 Click the **Add Fields** drop down list.



Manage Requisitions

Advanced Search

Requisitioning BU Equals

Entered By Equals Whittemore, Bob

Requisition Starts with

Description Starts with

Status Equals All

Requester Equals

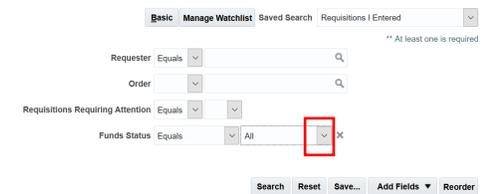
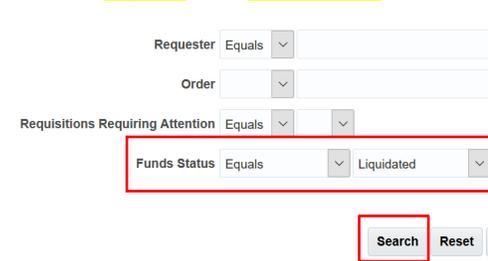
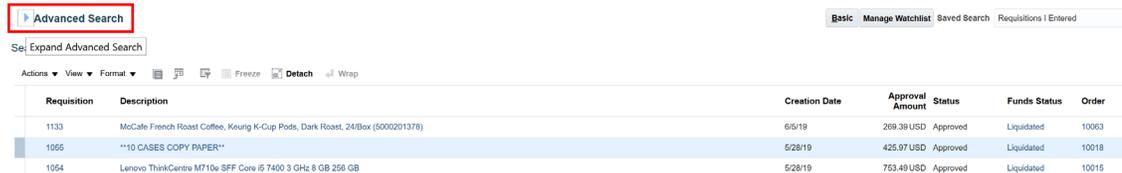
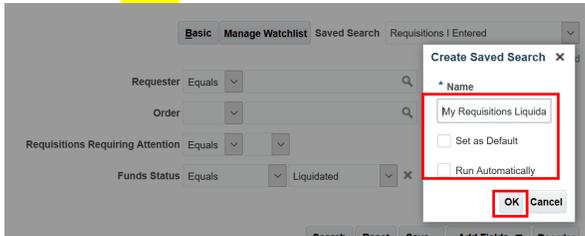
Order

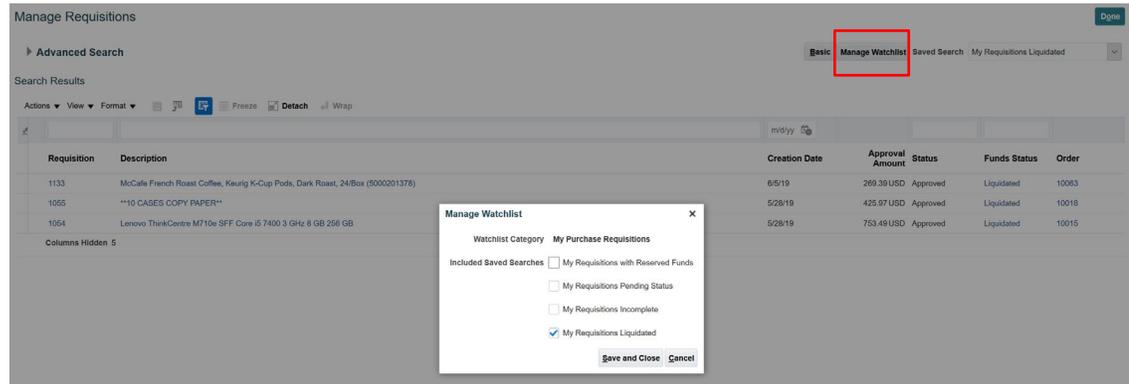
Requisitions Requiring Attention Equals

Search Reset Save Add Fields Recorder

Funds Status

Requisition	Description	Creation Date	Approval Amount	Status
1187	First Aid Kit - Hard Case - Level 1	6/17/19	145.89 USD	Inco
1186	test	6/17/19	2.00 USD	Inco
1185	First Aid Chair covered in Non-porous o/w Eye Lamp	6/17/19	1,521.00 USD	Penc
- 10 Click the **Funds Status** list option.

11	<p>Click the Funds Status list.</p> 
12	<p>Click the Equals and Liquidated list items.</p> 
13	<p>Click the Search button. This Search should return all Requisitions where the Funds have been Liquidated.</p>
14	<p>Click the Expand Advanced Search button.</p> 
15	<p>Click the Save... button. Enter in the name of the search: My Requisitions Liquidated.</p> 
16	<p>Deselect the Set as Default and the Run Automatically options.</p>
17	<p>Click the OK button.</p>
18	<p>Click the Manage Watchlist button.</p>



19 In the Included Saved Searches section click the **My Requisitions Liquidated** option.

20 Click the **Save and Close** button.

21 Click the **Watchlist** button (It is Flag on top of the menu).

22 Under **My Purchase Requisitions** click the **My Requisitions Liquidated** link.

Watchlist

Change Orders

Draft (0)

Pending approval (0)

Rejected (0)

My Purchase Requisitions

My Requisitions Incomplete

My Requisitions Liquidated

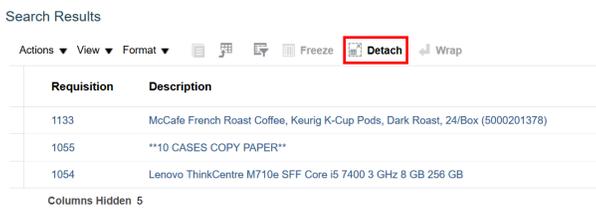
My Requisitions Pending Status

Purchase Agreements

My agreements requiring attention (0)

Purchase Orders

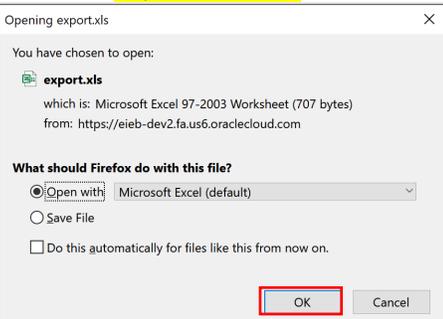
23 Click the **Detach** button.



24 Click the **Actions** menu.

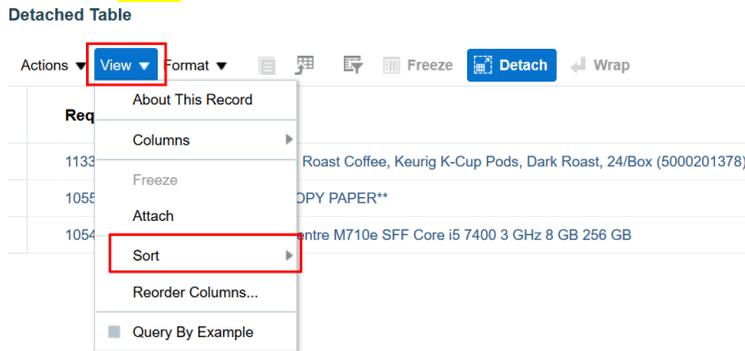


25 Click the **Export to Excel** menu and click **Ok**. When the message appears click **Yes**.



26 Click the **Detach** button.

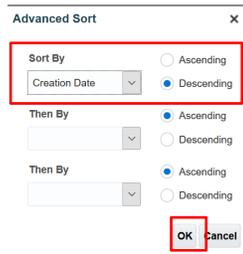
27 Click the **View** menu.



28 Click the **Sort** menu.

29 Click the **Advanced...** menu for more options.

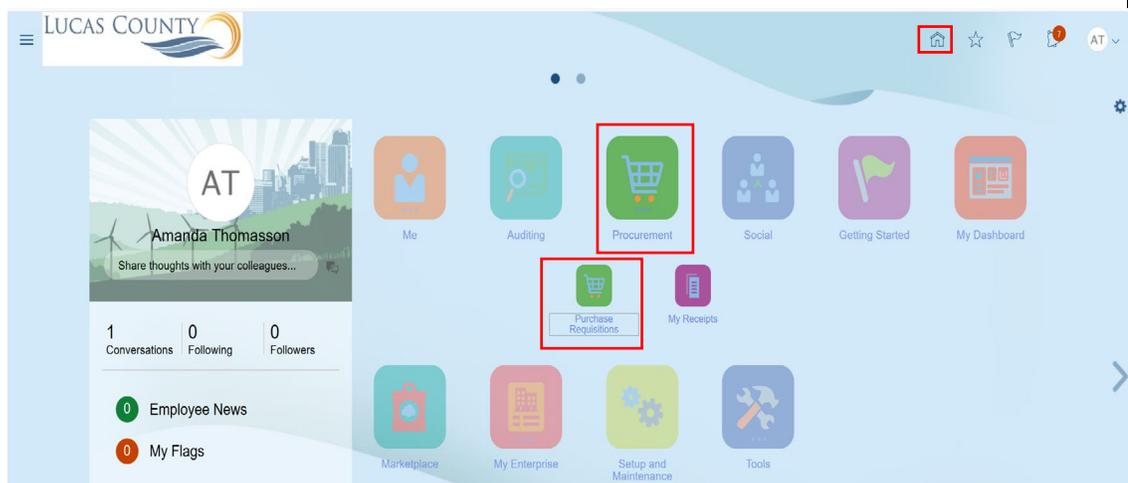
30 Click the **Sort By** list and make a selection to view according to date and other criteria. You can select Ascending or Descending order using radio buttons to make a selection.

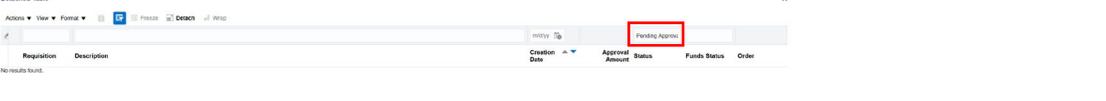


31 For this example, click the **Creation Date list** item and click the **Descending** option.

32 Click the **OK** button.

33 Navigate back to **Home Page > Procurement > Purchase Requisitions**



34	Click the Manage Requisitions link.
35	<p>Click the View and select the Query By Example option.</p> 
36	<p>Under Search Results click in the Status field.</p> 
37	<p>Enter a valid status, for this example type 'Pending Approval' into the Status field.</p> 
38	<p>Press [Enter].</p>
39	<p>Rows should be returned for the entered status if there are any matching that status. If not, no results will display, and you can continue.</p> 
39	<p>Click the Clear All icon.</p>  <p>This should return to display all requisitions.</p> 

40 In the **Search** screen, enter **'Liquidated'** into the Funds Status field. Click the **[Enter]** key.

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1133	McCafe French Roast Coffee, Keurig K-Cup Pods, Dark Roast, 24Box (5000201378)	6/5/19	269.39 USD	Approved	Liquidated	10063
1055	***10 CASES COPY PAPER**	5/28/19	425.97 USD	Approved	Liquidated	10018
1054	Lenovo ThinkCentre M710e SFF Core i5 7400 3 GHz 8 GB 256 GB	5/28/19	753.49 USD	Approved	Liquidated	10015

Columns Hidden 5

41 Click an **Order** link from the display.

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1133	McCafe French Roast Coffee, Keurig K-Cup Pods, Dark Roast, 24Box (5000201378)	6/5/19	269.39 USD	Approved	Liquidated	10063
1055	***10 CASES COPY PAPER**	5/28/19	425.97 USD	Approved	Liquidated	10018
1054	Lenovo ThinkCentre M710e SFF Core i5 7400 3 GHz 8 GB 256 GB	5/28/19	753.49 USD	Approved	Liquidated	10015

Columns Hidden 5

Purchase Order: 10063

Main

General

Procurement BU: Lucas County
 Requisitioning BU: Lucas County
 Sold-to Legal Entity: Lucas County
 Bill-to BU: Lucas County
 Order: 10063
 Status: Open
 Funds Status: Reserved
 Buyer: Michael Rath
 Creation Date: 6/5/19

Supplier: Staples Inc.
 Supplier Site: Main
 Supplier Contact: Darren Rushford
 Communication Method: None
 Bill-to Location: Auditor - Accounting
 Ship-to Location: Support Services

Ordered: 269.39 USD
 Total Tax: 0.00 USD
 Total: 269.39 USD
 Description: Requisition 1133
 Source Agreement: 10005
 Supplier Order

Required Acknowledgment: None
 Payment Terms: Immediate
 Shipping Method: _____ Requires signature
 Freight Terms: None
 FOB: Destination
 _____ Pay on receipt
 _____ Confirming order

Additional Information

Context Prompt

Order Life Cycle

Ordered: 269.39 USD

Pending Change Order

Change Order: 1
 Description: Less
 Status: Pending Approval
 Initiating Party: Buyer
 Initiator: Michael Rath
 Creation Date: 6/10/19
 Amount Changed: +9.75 USD

Lines Schedules Distributions

Line	Item	Description	Quantity	UOM	Price	Ordered	Status	Funds Status
1		McCafe French Roast Coffee, Keurig K-Cup Pods, Dark Roast, 24Box (5000201378)	10	Each	9.95	99.50	Open	Reserved
2		SanDisk Cruzer Glide 16GB SDCZ60-016G-A46 USB 2.0 Flash Drive, Black/Red	10	Each	10.99	109.90	Open	Reserved

42 Review the Purchase Order. Click the **Done** button.

43 Click the **Home** button.