Self Service Procurement Training
Oracle Cloud Applications Implementation Lucas County
December 2019

Oracle Cloud Self Service Procurement
Job Aids Table of Contents

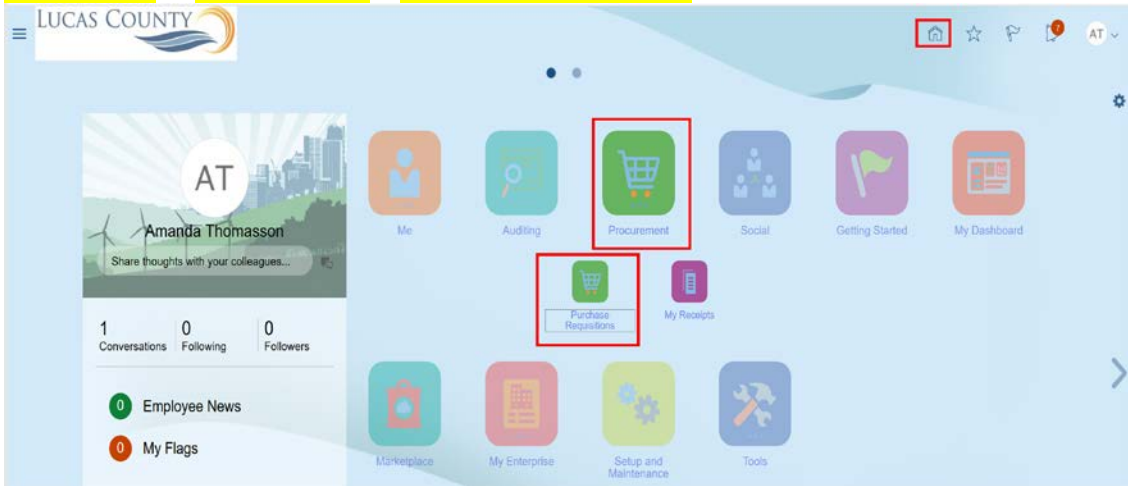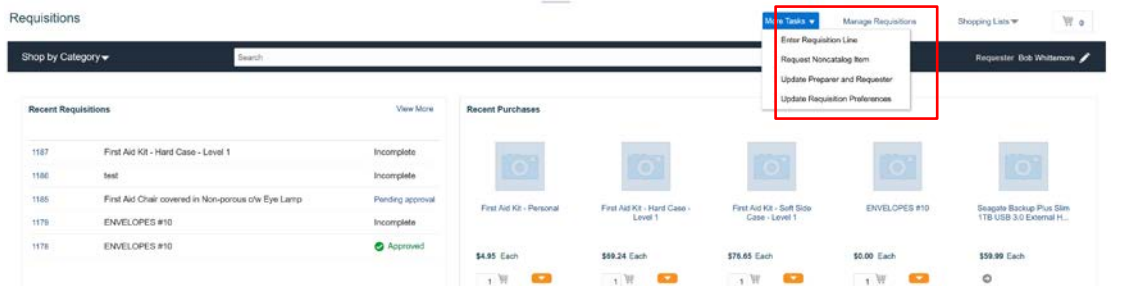*These Job Aids only apply to following Lucas County Agencies: Mental Health & Recovery Services, Board of Developmental Disabilities, Lucas County Children Services, Toledo Lucas County Health Department, Lucas County Emergency Planning Commission, Lucas County Soil & Water, Olander Park and Board of Elections.

Set Requisition Preferences - Multiple Accounts

Audience: Requesters

Purpose: This job aid will provide guidance in setting up preferences to allow for ease of purchase requisition process.

Step	Action
1	Log into Oracle. **Home Page** -> **Procurement > Purchase Requisitions**
2	Click the **More Task** button and select **Update Requisition Preferences**.
3	Under the Favorite Charge Accounts click the **Add Row button**. The '+' icon represents adding a row.

Edit Requisition Preferences

Requisitioning BU   Lucas County

◢ Shipping and Delivery

      * Requester   Chapa, Jessica 🔍

    * Deliver-to Location   Support Services 🔍

    Destination Type   Expense ⌄

◢ Billing

   ◢ Projects

      Project Number   🔍

      Task Number

      Expenditure Type

Expenditure Organization

   ◢ Favorite Charge Accounts   **+**

Primary	* Nickname	* Charge Account	Delete

4	Click in the ***Nickname** field. Requesters can enter multiple Charge Accounts with identifying Nicknames if they normally use more than one account to charge requisition lines to. One account must be identified as the default primary (Tick Mark) account.
5	Enter information into the ***Nickname** field. ◢ Favorite Charge Accounts 	Primary	* Nickname	 |---|---| 	⊘	Computer Products	
6	Click the ***Charge Account List of values** button. Select the default charge account values that will default into the Requisition. *** Charge Account** [ ] 🔍

7	Click the **OK** button.
8	Click the **Add Row** button. The '+' icon represents adding a row.
9	Click in the ***Nickname** field.
10	Enter information into the ***Nickname** field.
11	Click the ***Charge Account List of values** button. The Requester can click on the drop-down list and search for value for each of the specific account segments.
12	Click the **OK** button.
13	Click the **Nickname** field to select the row that will be the primary Charge Account.
14	Click the **Actions** menu.
15	Click on **Set Primary**.

	Favorite Charge Accounts			＋
Primary	*** Nickname**	*** Charge Account**		**Delete**
✅	Computer Products	1010.114001.50.121500.00000.0(		✖
☑	Furniture & Fixtures	1010.114001.50.630007.00000.0(		✖

Set Primary   **Save and Close**   Cancel

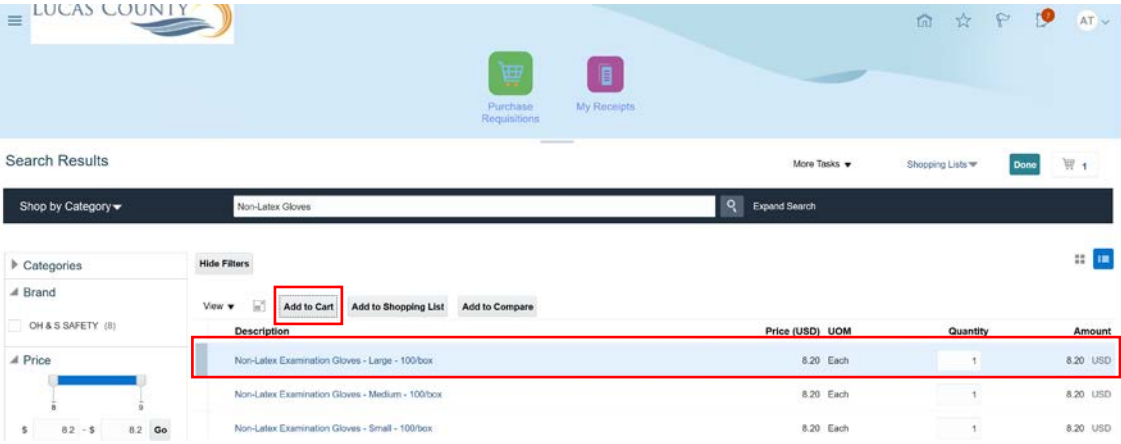| 16	Click the **Save and Close** button.

17	To view how the default values, fill in, click the **More Tasks > Enter Requisition Line** link.
	 Notice that **Deliver-to-Location** and **Primary Charge Account** are defaulted in the new requisition based on the preferences.
	
	 More Tasks ▼ Manage Requisitions
	     Enter Requisition Line
	     Request Noncatalog Item
	     Update Preparer and Requester
	     Update Requisition Preferences

Create Requisition from a Catalog (Internal and Punchout)

Audience: Requesters

Purpose: A punchout catalog consists of items that the supplier maintains. In the Purchase Requisitions work area, a requester can click a link to the external supplier site from the Requisitions page or the Search Results page. Here requesters can add items from the external site to the requisition being created. After shopping at a supplier's site, you are returned to the Purchase Requisitions work area. If you return from punchout with items, you are returned to the **Edit Requisition** page where you can see the goods added as lines to the requisition. Follow the normal process to edit and submit the requisition. Note: You can shop only at internet sites to which Self Service Procurement directs you through a link. This job aid will assist you with creating a purchase requisition from a catalog.

Step	Action
	Create a purchase requisition from an Internal Catalog.
1	Log into Oracle **Home Page** -> **Procurement** > **Purchase Requisitions**
2	In the Requisitions window, click in the **Search** field, and enter an item to search.

3	Click the 🔍 **Search** button.
4	Search results will display with a default quantity of "1", noting description and price per unit of measure. From the returned results, select a line item and click the **Add to Cart** button.
5	Click the **Shopping Cart** and select **Review** to return to the **Edit Requisition** page.
6	The **Edit Requisition** page is now displayed. Select Y/N option for ***State Contract - If yes, please insert Contract Number.**

	Edit Requisition: 1193 [Shop] [Check Funds] [Manage Approvals] [View PDF] [Save ▼] [Submit] Requisitioning BU Lucas County * Description Non-Latex Examination Gloves - Large - 100/box * State Contract - If yes, please insert Contract Number Yes ▼ State Contract Number * Sole Source - If yes please attach proof of Sole Source ▼ * Resolution Attached ▼ * Will Services be performed on Lucas County property? ▼ Justification Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Not reserved Attachments None ✚ **Requisition Lines** Actions ▼ View ▼ Format ▼ [icons] Freeze Detach Wrap Line / Description / Category Name / * Quantity / UOM Name / Price / Amount (USD) / Funds Status / Delete 1 / Non-Latex Examination Gloves - Large - 100/box / 345 / 1 / Each / 8.20 USD / 8.20 / Not reserved / ✕ Total / / / / / / 8.20
7	Enter if 'Y' is selected enter a number in the ==State Contract Number== field. **Edit Requisition: 1193** [Shop] [Check Funds] [Manage Approvals] [View PDF] [Save ▼] [Submit] Requisitioning BU Lucas County * Description Non-Latex Examination Gloves - Large - 100/box * State Contract - If yes, please insert Contract Number Yes ▼ State Contract Number A-12345678900 * Sole Source - If yes please attach proof of Sole Source ▼ * Resolution Attached ▼ * Will Services be performed on Lucas County property? ▼ Justification Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Not reserved Attachments None ✚ **Requisition Lines** Actions ▼ View ▼ Format ▼ [icons] Freeze Detach Wrap Line / Description / Category Name / * Quantity / UOM Name / Price / Amount (USD) / Funds Status / Delete 1 / Non-Latex Examination Gloves - Large - 100/box / 345 / 1 / Each / 8.20 USD / 8.20 / Not reserved / ✕ Total / / / / / / 8.20 Rows Selected 1 Columns Hidden 8 ◢ Line 1: Details ◢ Delivery
8	Select Y==/N *Sole Source== ("If yes please attach proof of Sole Source"). In this example select **'N'.** **Edit Requisition: 1193** [Shop] [Check Funds] [Manage Approvals] [View PDF] [Save ▼] [Submit] Requisitioning BU Lucas County * Description Non-Latex Examination Gloves - Large - 100/box * State Contract - If yes, please insert Contract Number Yes ▼ State Contract Number A-12345678 * Sole Source - If yes please attach proof of Sole Source No ▼ * Resolution Attached ▼ * Will Services be performed on Lucas County property? ▼ Justification Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Not reserved Attachments None ✚ **Requisition Lines** Actions ▼ View ▼ Format ▼ [icons] Freeze Detach Wrap Line / Description / Category Name / * Quantity / UOM Name / Price / Amount (USD) / Funds Status / Delete 1 / Non-Latex Examination Gloves - Large - 100/box / 345 / 1 / Each / 8.20 USD / 8.20 / Not reserved / ✕ Total / / / / / / 8.20 Rows Selected 1 Columns Hidden 8
9	Select Y==/N *Resolution Attached==. In this example select **'N'.**

10	Select Y/**N *Will Services be performed on Lucas County property?** In this example select **'N'.** ******
11	Does this purchase require the attachment of the LCIS Checklist? If so, please attach in the Attachments section below.
12	Click the **Check Funds** button.

13	You can choose to View the Funds Check Results, or simply click the **OK** button.
14	Click the **Save** button.
15	Click the **Manage Approvals** button.

Review the approval path for the requisition.

| 16 | Click the **Back** button. |
| 17 | Click the **Submit** button. |

| 18 | Click the **OK** button. |

Step	Action
	Create a purchase requisition from a Punchout catalog.
1	Log into Oracle. <mark>**Home Page**</mark> -> <mark>**Procurement**</mark> > <mark>**Purchase Requisitions**</mark>
2	Under the Top Categories section click the <mark>**Staples**</mark> icon.

3	Under Related Suppliers select **Staples** link.
	This will connect you to the supplier site for ordering.
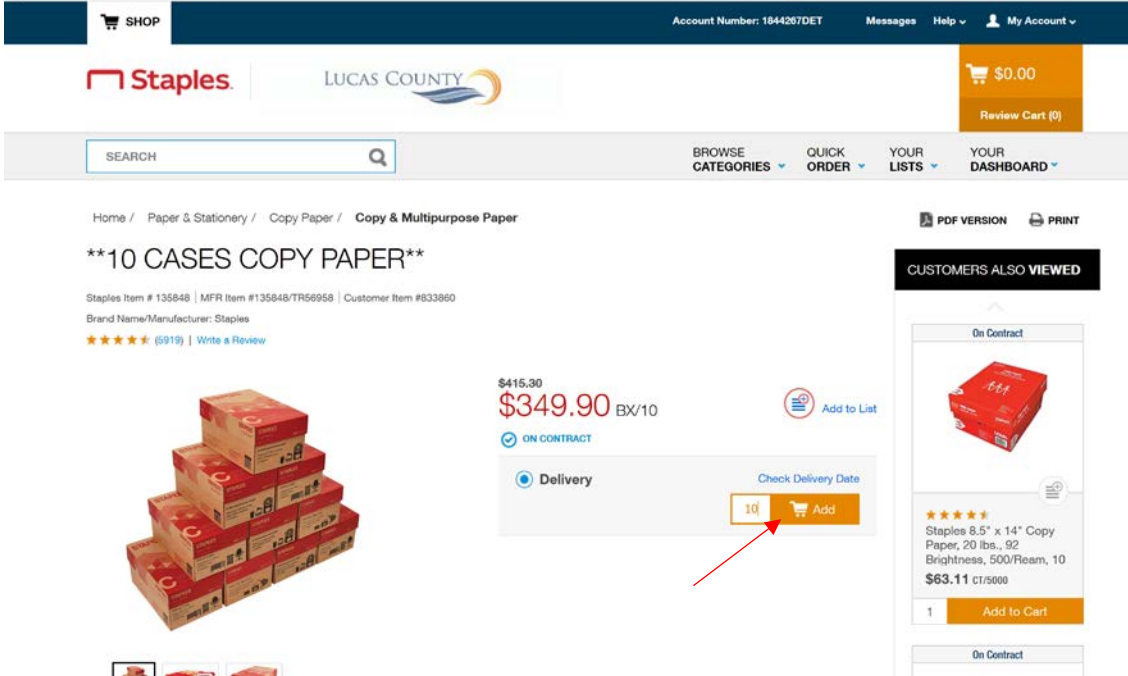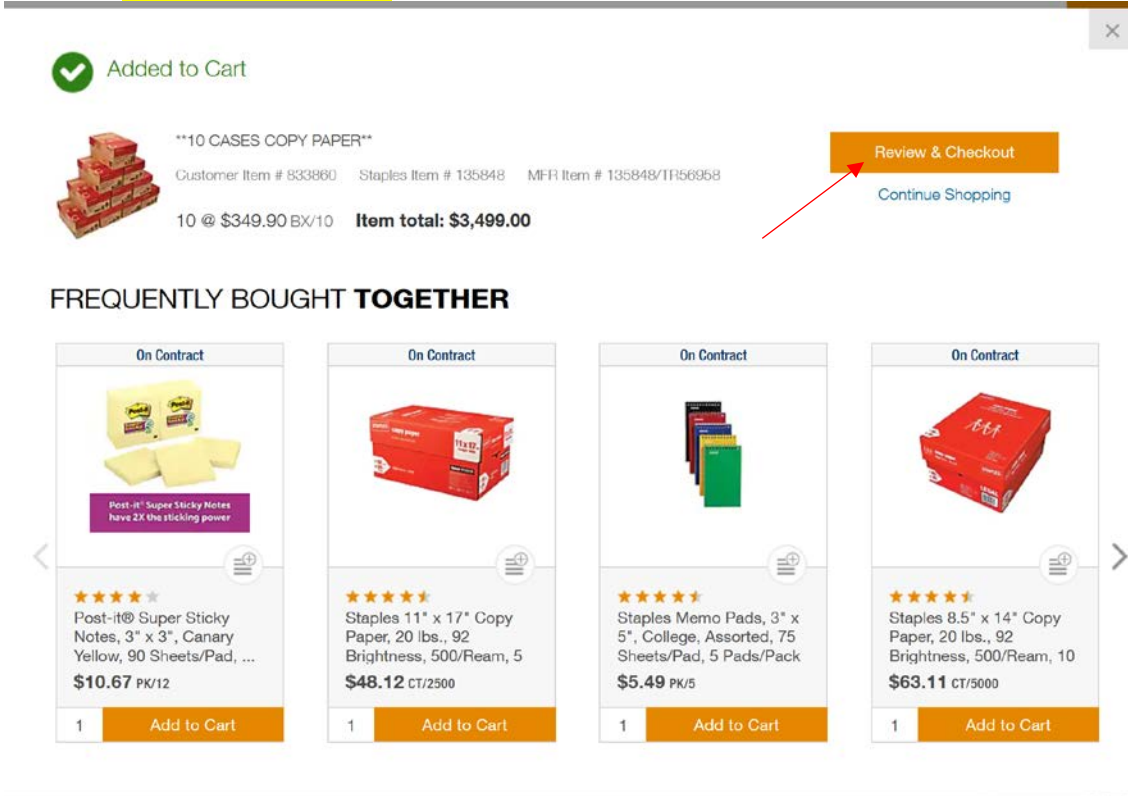
4	Search for Item by name or number.
5	Update the **Quantity and Add to Cart**.
6	Click the **Review & Check Out** button**.**
7	Click the **Submit Order** button. This will return you back to the requisition.

8	View the Source information. Does this purchase require the attachment of the LCIS Checklist? If so, attach in the Attachments section.
9	The **Edit Requisition** page is now displayed. Select Y/N option for ***State Contract - If yes, please insert Contract Number.**

10	Enter if 'Y' is selected enter a number in the ==State Contract Number== field.
11	Select Y/==N *Sole Source== ("If yes please attach proof of Sole Source"). In this example select =='N'==

12	Select Y/**N *Resolution Attached.** In this example select **'N'.**

13	Select Y/**N *Will Services be performed on Lucas County property?** In this example select **'N'.**

14	Click the **Check Funds** button.
15	Click the **OK** button.
16	Click the **Save** button.

17	Click the **Manage Approvals** button.

Review approval path for the requisition.
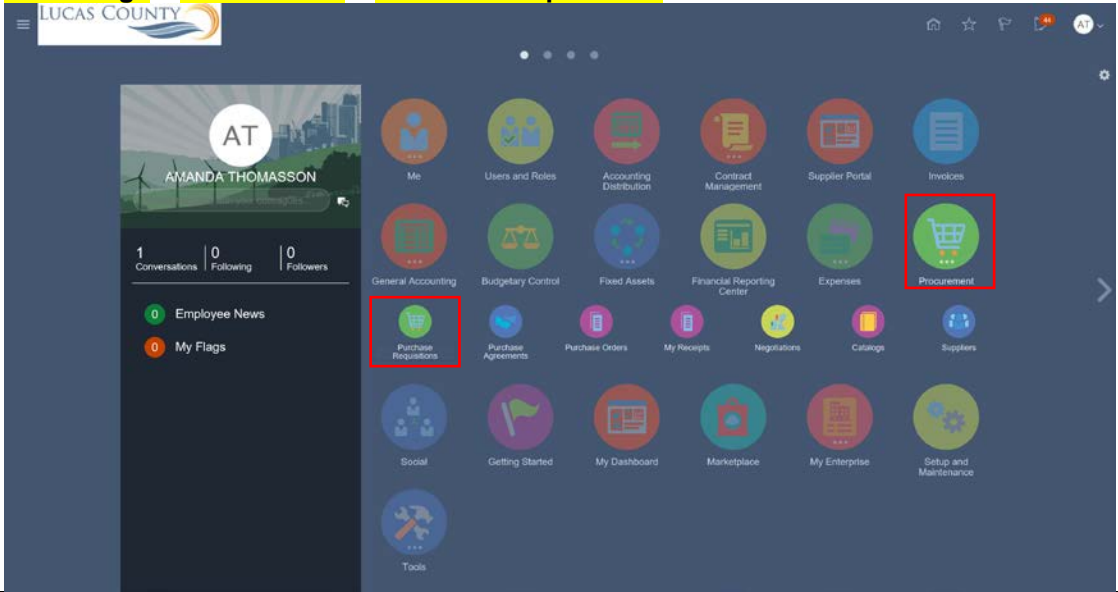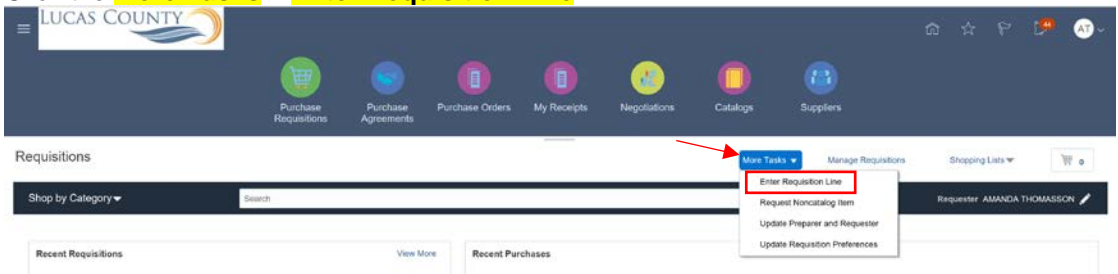
18	Click the Back button.

19	Click the Submit button.

20	Click the OK button.
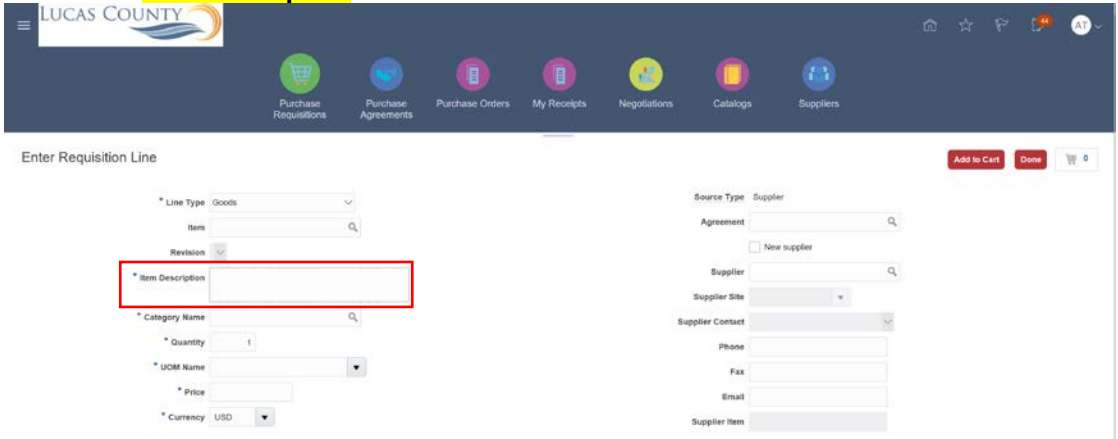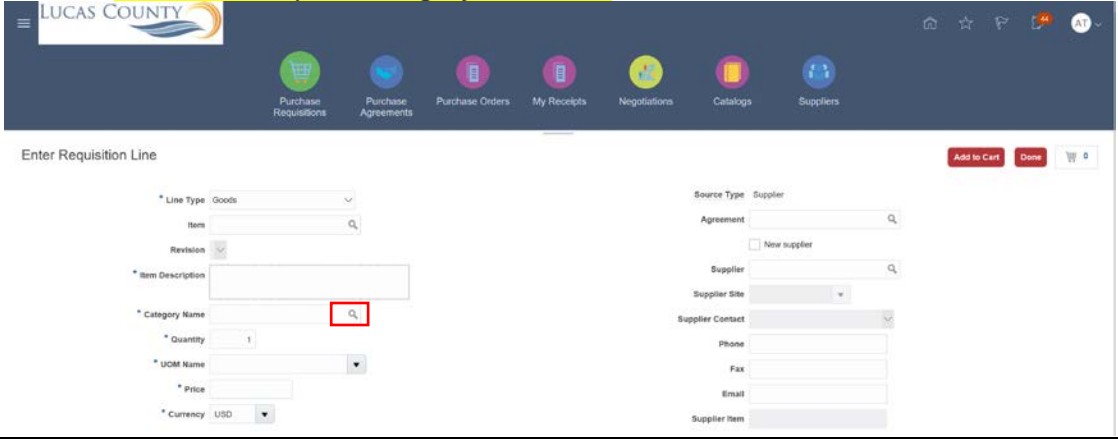
Create Requisition Line Entry for a Non-Catalog for Goods

Audience: Requesters, Buyers

Purpose: An order is a formal authorization to purchase goods or services (amount based). Your purchasing department creates a purchase order, which a supplier receives. A purchase order can be tracked until you receive the goods or services. A requisition is a request for the goods or services. If approved, a purchase order is created to fulfill the requisition. The Requisitions page is the landing page for the Purchase Requisitions work area and is also informally referred to as the shopping home page. Requesters can use the self-service page to place purchase requests for goods or services. Non-catalog items have details that are not found in a catalog, and therefore do not auto populate. This job aid will assist you with creating a purchase requisition line entry for non-catalog requisition for Goods.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link.
3	Click the **Line Type** list.
4	Select the **Goods** list item from the drop down menu.

Line Type | Goods

5	Click in the **Item Description** field.
6	Enter information into the **Item Description** field.
7	Click in the **Category Name** field.
8	Click the **Search icon**: by the **Category Name** field.
9	Click in the **Category Name** field.
10	Enter **Category Number** into **Category Name** field if known

11	Click **Advance button** to search for Category Number/Description
12	Use the **Does not equal,** to get a list of all Category Name/Description
13	Enter information into the **Description** or **Category** fields.
14	Click the **Search** button.
15	Make a selection from the search results list.

16	Click the **OK** button.
17	Click in the **Quantity** field.
18	Enter information into the **Quantity** field.
19	Click in the **UOM** field.
20	Enter information into the **UOM** field.
21	Click the **EA Quantity** Each list item.
22	Click in the **Price** field.
23	Enter information into the **Price** field.
24	Click in the **Currency** field.
25	Click the **Charge Account** icon and either accept default or add new applicable charge account information.
26	In the Notes and Attachments section, click the **+** icon next to **Attachments None**.
27	In the Attachments window click the **Type** list.
28	Select the **File** list item.
29	Click the **Category** list.
30	Click to select the **To Buyer** list item.
31	Click the **Browse** button under ***File Name or URL** field.
32	Select a file for **Attachment**.
33	Click in the **Title** field.
34	Enter information into the **Title** field.
35	Click in the **Description** field and enter information into the **Description** field.
36	Click the **Add to Cart** button.

37	Click Shopping Cart icon and select **Review.**
38	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
39	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
40	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
41	Select Y/N ***Resolution Attached**.
42	Select Y/N ***Will Services be performed on Lucas County property?**
43	Click the **Check Funds** button.
44	Click the **View Funds Check Results** button.
45	Click the **Done** button.
46	Click the **OK** button.
47	Click the **Manage Approvals** button.
48	Click the **Submit** button.
49	Click the **OK** button.

![Lucas County Ohio logo]

Create Requisition Line Entry for a Non-Catalog for Goods (Agency)

Audience: Agency Requesters

Purpose: An order is a formal authorization to purchase goods or services (amount based). Your purchasing department creates a purchase order, which a supplier receives. A purchase order can be tracked until you receive the goods or services. A requisition is a request for the goods or services. If approved, a purchase order is created to fulfill the requisition. The Requisitions page is the landing page for the Purchase Requisitions work area and is also informally referred to as the shopping home page. Requesters can use the self-service page to place purchase requests for goods or services. Non-catalog items have details that are not found in a catalog, and therefore do not auto populate. This job aid will assist you with creating a purchase requisition line entry for non-catalog requisition for Goods.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link.
3	Click the **Line Type** list.
4	Select the **Goods** list item from the drop down menu.

	* Line Type	Goods ⌄

5	Click in the **Item Description** field.
6	Enter information into the **Item Description** field.
7	Click in the **Category Name** field.
8	Click the **Search icon**: by the **Category Name** field.
9	Click in the Description field.
10	Enter **Category Number** into **Category Name** field if known

11	Click **Advance button** to search for Category Number/Description
12	Use the **Does not equal,** to get a list of all Category Name/Description
13	Enter information into the **Description** or **Category** fields.
14	Click the **Search** button.
15	Make a selection from the search results list.

16	Click the **OK** button.
17	Click in the **Quantity** field.
18	Enter information into the **Quantity** field.
19	Click in the **UOM** field.
20	Enter information into the **UOM** field.
21	Click the **EA Quantity** Each list item.
22	Click in the **Price** field.
23	Enter information into the **Price** field.
24	Click the Negotiated Check Box *Line Type Goods Item Revision *Item Description Test Item *Category Name 005 *Quantity 1 *UOM Name Each *Price 10.00 *Currency USD ☑ Negotiated
25	Enter Suggested Buyer (Suggested buyer is the buyer designated for the Department) ⊿ Delivery *Requester THOMAS, BRENDAN Urgent No Requested Delivery Date 11-27-2019 Suggested Buyer THOMAS, BRENDAN
26	Search and Select the Supplier and Supplier Site to whom the Purchase Order is to be issued Source Type Supplier Agreement ☐ New supplier Supplier Sierra-Cedar, Inc. Supplier Site MAIN-ACH6789 Supplier Contact Phone Fax Email Supplier Item
27	Click the **Charge Account** icon and either accept default or add new applicable charge account information.
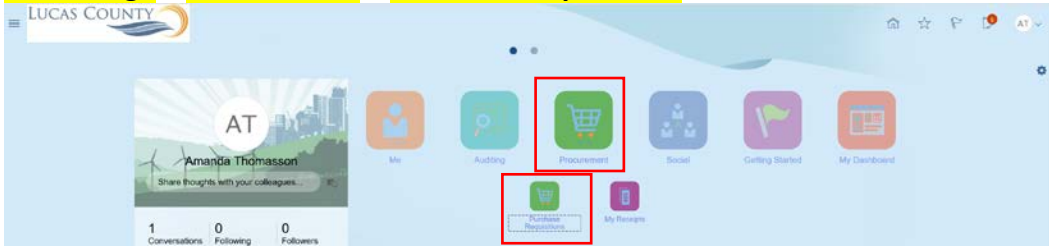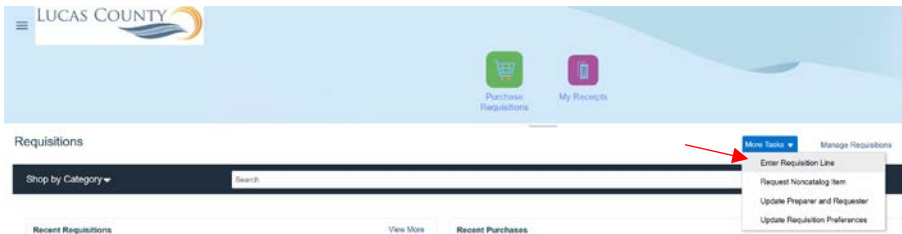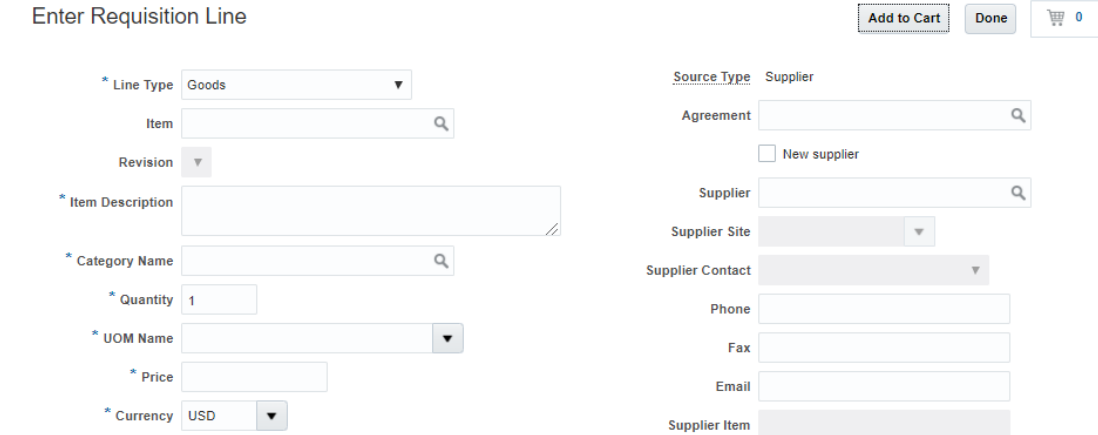
28	In the Notes and Attachments section, click the **+** icon next to **Attachments None**.

29	In the Attachments window click the **Type** list.
30	Select the **File** list item.
31	Click the **Category** list.
32	Click to select the **To Buyer** list item.
33	Click the **Browse** button under ***File Name or URL** field.
34	Select a file for **Attachment**.
35	Click in the **Title** field.
36	Enter information into the **Title** field.
37	Click in the **Description** field and enter information into the **Description** field.
38	Click the **Add to Cart** button.
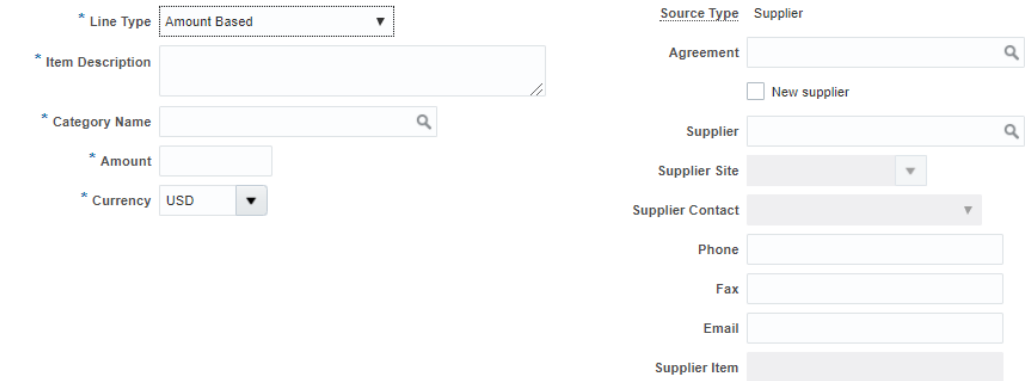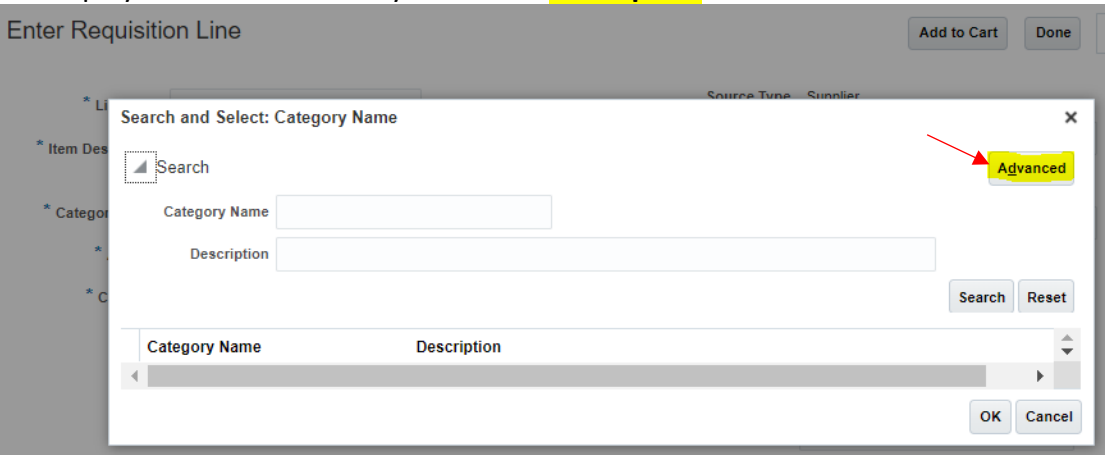
39	Click Shopping Cart icon and select ==Review.==
40	Select Y/N option for ==*State Contract - If yes, please insert Contract Number.==
41	Enter if 'Y' is selected enter a number in the ==State Contract Number== field.
42	Select Y/N ==*Sole Source== ("If yes please attach proof of Sole Source").
43	Select Y/N ==*Resolution Attached==.
44	Select Y/N ==*Will Services be performed on Lucas County property?==
45	Click the ==Submit== button.
46	Click the ==OK== button.

Create Requisition Line Entry for a Non-Catalog Requisition for Services

Audience: Requesters

Purpose: This job aid will assist you with creating a requisition line entry for non-catalog requisition for purchasing services (amount based). If the item does not exist in the catalog, place a noncatalog request by clicking the Noncatalog Request link under Quick Links in the contextual area.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link. **Note**: *Services* are entered via **Enter Requisition Line**. Noncatalog Item is used for *items* not found in catalog.
	The **Enter Requisition Line** window displays fields for entry.

3	The Line Type dropdown displays *Goods* by default. Choose from the **Line Type** dropdown and select **Amount Based** (which is for Services). * **Line Type** Amount Based ⌄ I

	The fields change based on the Line Type of Amount Based.
	
	Enter Requisition Line Add to Cart Done 🛒 0
	
	* Line Type Amount Based ▼ Source Type Supplier
	* Item Description Agreement 🔍
	    ☐ New supplier
	* Category Name 🔍 Supplier 🔍
	* Amount Supplier Site ▼
	* Currency USD ▼ Supplier Contact ▼
	    Phone
	    Fax
	    Email
	    Supplier Item

4	Click in the **Item Description** field and enter a description.
5	Category information is required. Click in the **Category Name** field and make a selection using the **Search** icon.

6	Categories have names and longer descriptions. If the Category Name is unknown, you can use an **Advanced** search option to look up by known information. Results will display in a list immediately below the **Description** field.
	
	Enter Requisition Line Add to Cart Done
	
	Search and Select: Category Name ✕
	◢ Search Advanced
	Category Name
	Description
	    Search Reset
	Category Name Description
	    OK Cancel

7	The Advanced search allows you to enter known information and decide whether the name or description contains, begins with, ends with the words you enter. In this example, select the category **Description** operator dropdown and select **Contains**. Then enter the word "repair" in the field. Upon clicking the **Search** button, the system will search for all category descriptions containing the word "repair".

8	The search results will populate in a list below. Make a selection and click the **OK** button.

9	The category information populates the requisition line. **Note**: You cannot edit the quantity for fixed price services lines for goods or services billed by a currency amount because quantity is not applicable to these types of lines.
10	Click in the **Amount** field and enter the dollar amount information.
11	The **Currency** field defaults to USD.

12	Click the **Add to Cart** button.
13	Click Shopping Cart icon and select **Review.**
14	Answer the required questions using the dropdown buttons.

	Select Y/N option for *State Contract - If yes, please insert Contract Number.
15	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
16	Select Y/N **Sole Source** ("If yes please attach proof of Sole Source").
17	Select Y/N **Resolution Attached**.
18	Select Y/N **Will Services be performed on Lucas County property?**
19	Select Y/N **Does this purchase require the attachment of the LCIS Checklist?** **Note**: If yes, please attach in the Attachments section below.
20	Click the **Check Funds** button located at the top of the window.
21	A message will display regarding failure or success of the funds check. Click the **OK** button to acknowledge.
22	Click the **Manage Approvals** button to view the approvers.
23	Click the **Back** button.
24	Click the **Submit** button.
25	Click the **OK** button.
26	Click the **Home** button.
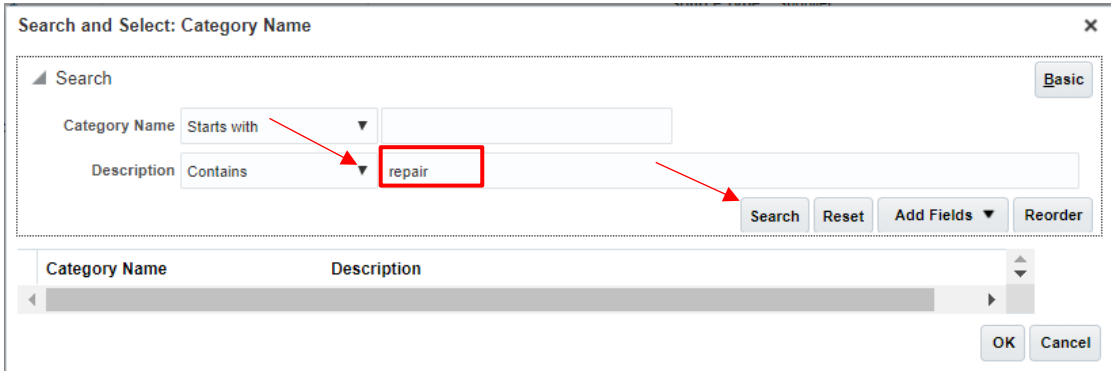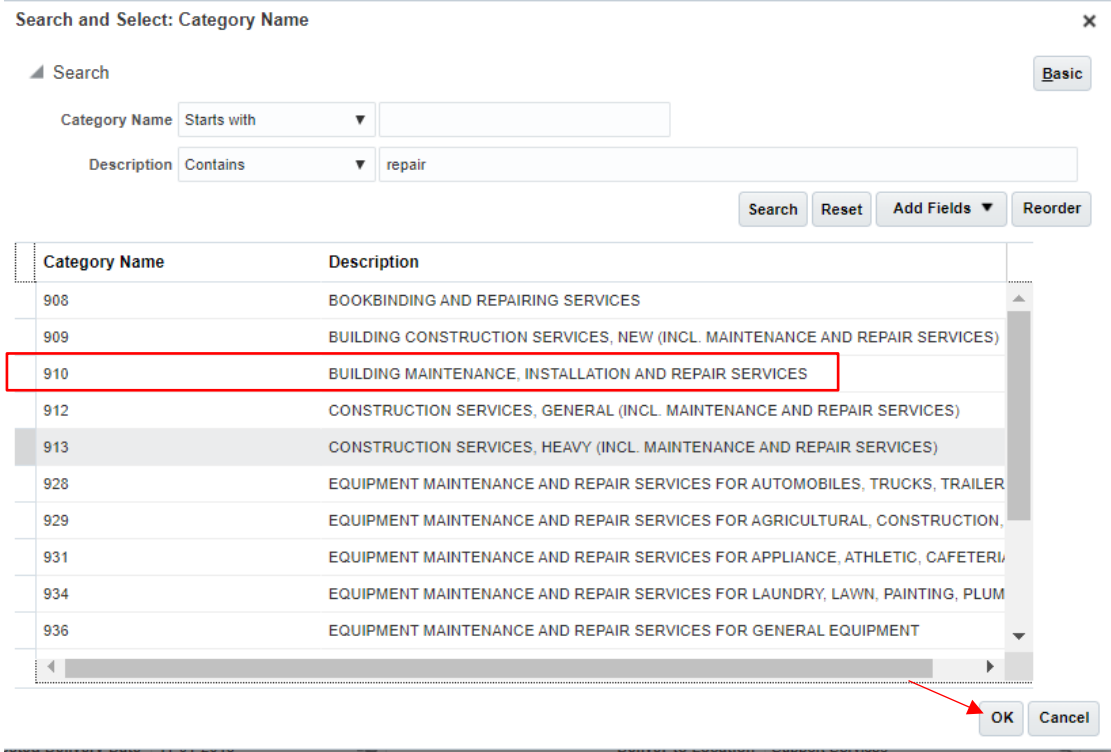
Create Requisition Line Entry for a Non-Catalog Requisition for Services

Audience: Agency Requesters

Purpose: This job aid will assist you with creating a requisition line entry for non-catalog requisition for purchasing services (amount based). If the item does not exist in the catalog, place a noncatalog request by clicking the Noncatalog Request link under Quick Links in the contextual area.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link. **Note**: *Services* are entered via **Enter Requisition Line**. Noncatalog Item is used for *items* not found in catalog.
	The **Enter Requisition Line** window displays fields for entry.

3	The Line Type dropdown displays *Goods* by default. Click the **Line Type** dropdown and select **Amount Based** (which is for Services). *** Line Type** [Amount Based ⌄]

	The fields change based on the Line Type of Amount Based.
	
	Enter Requisition Line [Add to Cart] [Done] 🛒 0
	
	* Line Type [Amount Based ▾] Source Type Supplier
	* Item Description [ ] Agreement [🔍]
	     ☐ New supplier
	* Category Name [🔍] Supplier [🔍]
	* Amount [ ] Supplier Site [▾]
	* Currency [USD ▾] Supplier Contact [▾]
	     Phone [ ]
	     Fax [ ]
	     Email [ ]
	     Supplier Item [ ]

4	Click in the **Item Description** field and enter a description.
5	Category information is required. Click in the **Category Name** field and make a selection using the **Search** icon.

6	Categories have names and longer descriptions. If the Category Name is unknown, you can use an **Advanced** search option to look up by known information. Results will display in a list immediately below the **Description** field.
	
	Enter Requisition Line [Add to Cart] [Done]
	
	Search and Select: Category Name ✕
	◢ Search **Advanced**
	   Category Name [ ]
	   Description [ ]
	               [Search] [Reset]
	   Category Name Description
	   [ ]
	               [OK] [Cancel]

7	The Advanced search allows you to enter known information and decide whether the name or description contains, begins with, ends with the words you enter. In this example, select the category **Description** operator dropdown and select **Contains**. Then enter the word "repair" in the field. Upon clicking the **Search** button, the system will search for all category descriptions containing the word "repair".

8	The search results will populate in a list below. Make a selection and click the **OK** button.

9	The category information populates the requisition line. **Note**: You cannot edit the quantity for fixed price services lines for goods or services billed by a currency amount because quantity is not applicable to these types of lines.
10	Click in the **Amount** field and enter the dollar amount information.
11	The **Currency** field defaults to USD.

12	Click the **Add to Cart** button.
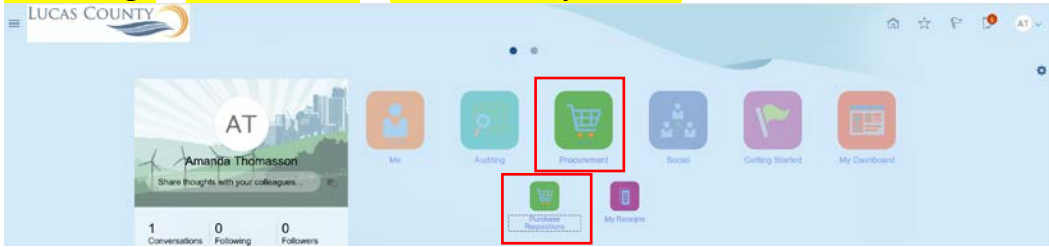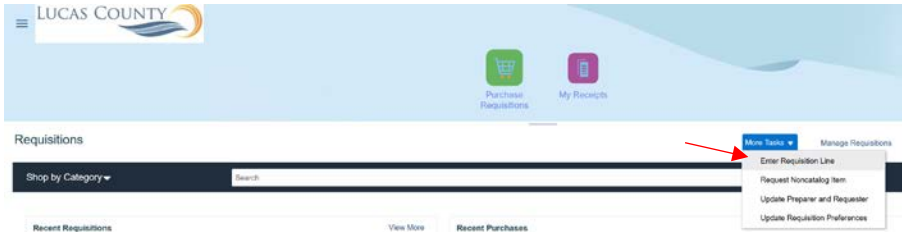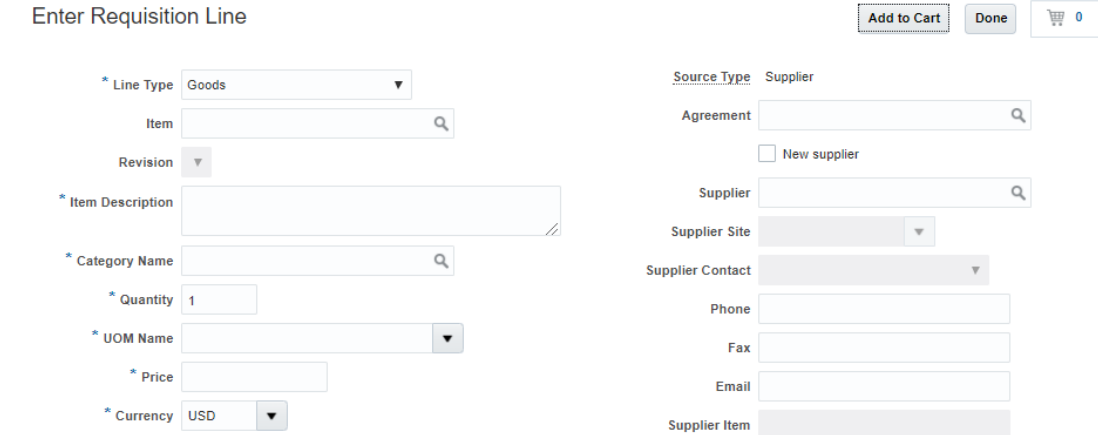| 13 | Click Shopping Cart icon and select **Review.**

 |
| 14 | Answer the required questions using the dropdown buttons. |

Edit Requisition: 1163   [Shop] [Check Funds] [Manage Approvals] [View PDF] [Save] [▼] [Submit]

Requisitioning BU   Lucas County

* Description   Roof Repair Services   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?   [▼]

	No	No
	Yes	Yes
	Search...	

Requisition Lines

Actions ▼ View ▼ Format ▼ 📄 ✎ ✖ ▦ Freeze

Line	Description	Category Name	* Quantity	UOM Name	* Price	* Amount	Amount (USD)	Funds Status	Delete
1	Roof Repair Service 910				5,000.00	US	5,000.00	Not reserved	✖
	Total						5,000.00		

	Select Y/N option for ==*State Contract - If yes, please insert Contract Number.==
15	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
16	Select Y/N ==*Sole Source== ("If yes please attach proof of Sole Source").
17	Select Y/N ==*Resolution Attached==.
18	Select Y/N ==*Will Services be performed on Lucas County property?==
19	Select Y/N ==*Does this purchase require the attachment of the LCIS Checklist?== **Note**: If yes, please attach in the Attachments section below.
20	Click the ==Negotiated Check Box==
21	Enter ==Suggested Buyer== ==(Suggested buyer is the buyer designated for the Department)==
22	==Search== and ==Select the Supplier== and ==Supplier Site== to whom the Purchase Order is to be issued

41

23	Click the **Charge Account** icon and either accept default or add new applicable charge account information.
24	In the Notes and Attachments section, click the **+** icon next to **Attachments None**.
25	In the Attachments window click the **Type** list.
26	Select the **File** list item.
27	Click the **Category** list.
28	Click to select the **To Buyer** list item.
29	Click the **Browse** button under ***File Name or URL** field.
30	Select a file for **Attachment**.
31	Click in the **Title** field.
32	Enter information into the **Title** field.
33	Click in the **Description** field and enter information into the **Description** field.
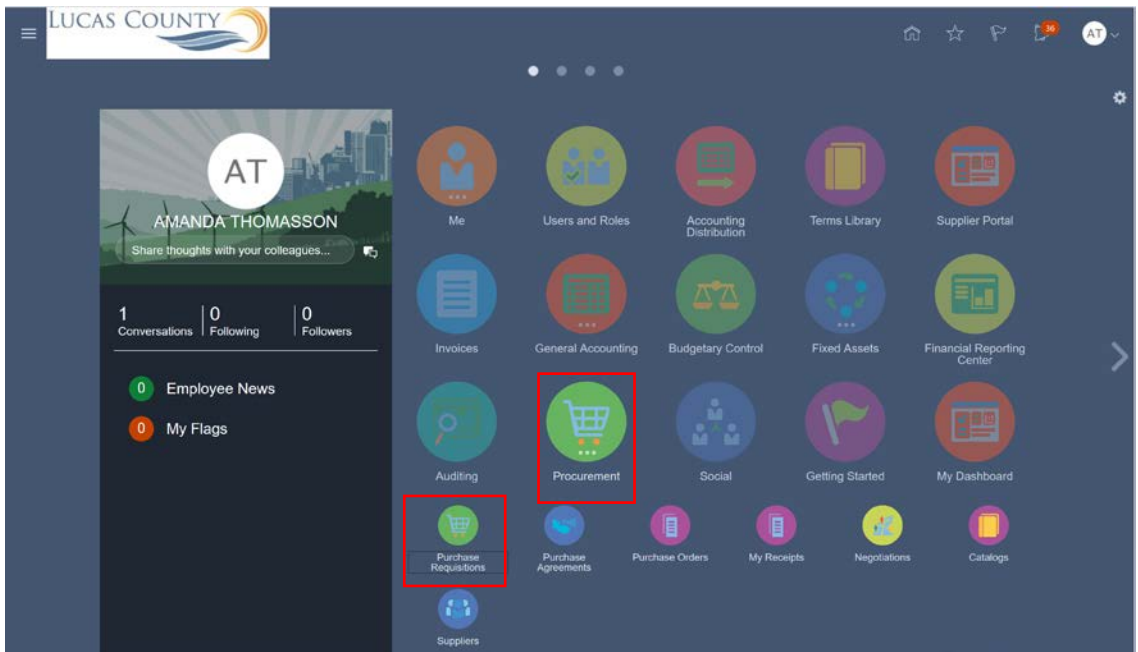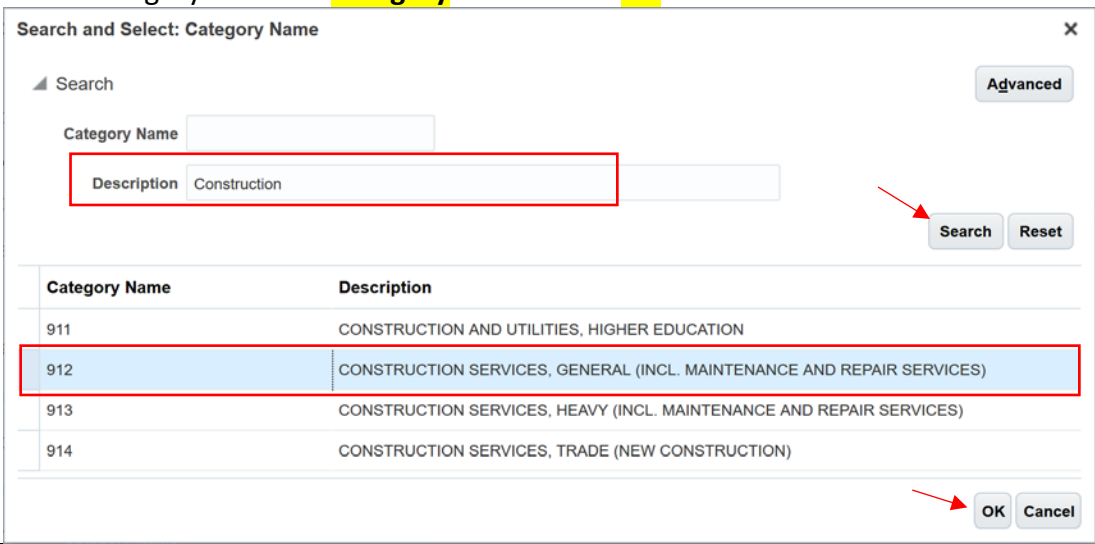
34	Click the **Add to Cart** button.

 |
| 35 | Click Shopping Cart icon and select **Review.**

 |
36	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
37	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
38	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
39	Select Y/N ***Resolution Attached**.
40	Select Y/N ***Will Services be performed on Lucas County property?**
41	Click the **Submit** button.
42	Click the **OK** button.
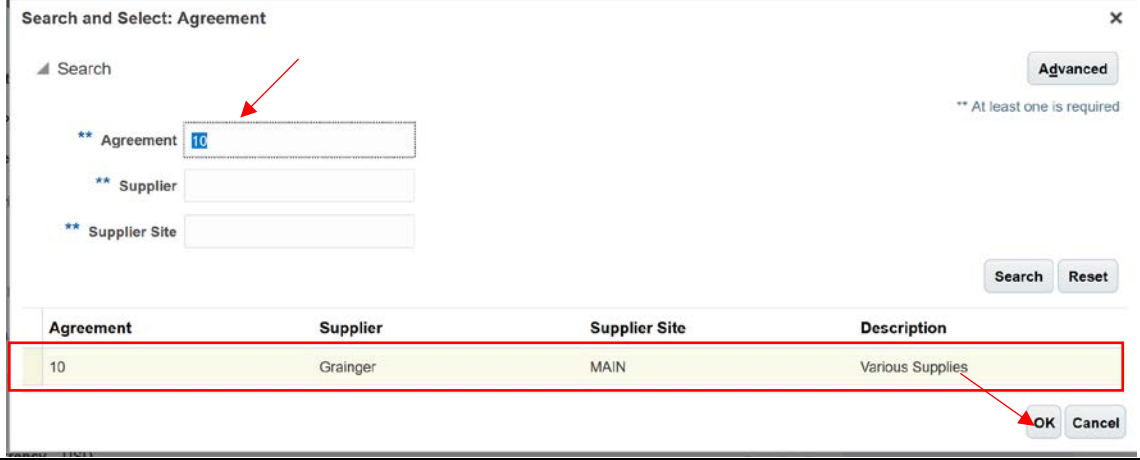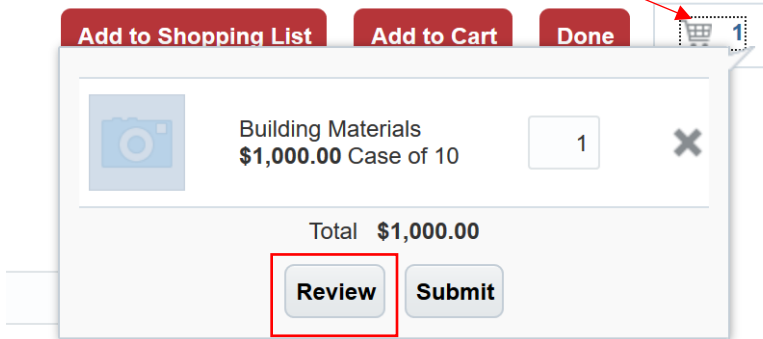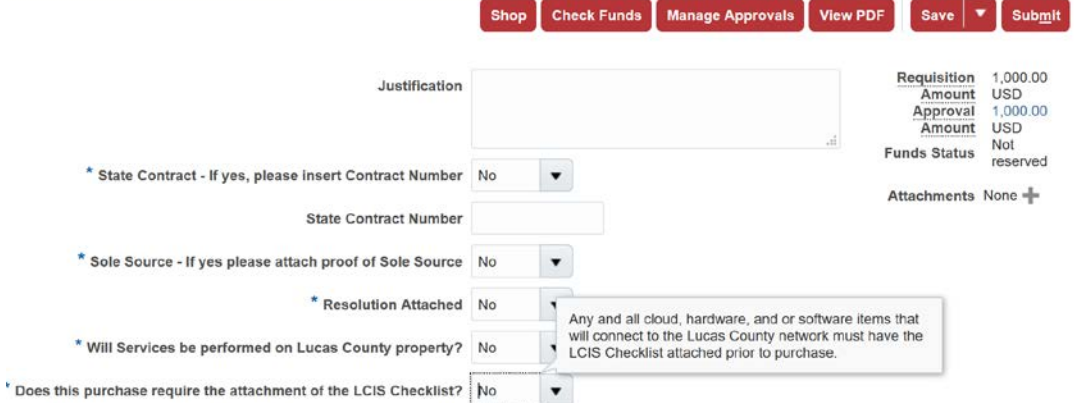
Create Requisition for Goods Referencing a CPA

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	Login to Oracle. **Home Page -> Procurement -> Purchase Requisitions**
2	Under **Request Forms**, select **Contract Purchase – Goods.**

Request Forms

- Contract Purchase - Goods
- Contract Purchase -Services

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**.
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.
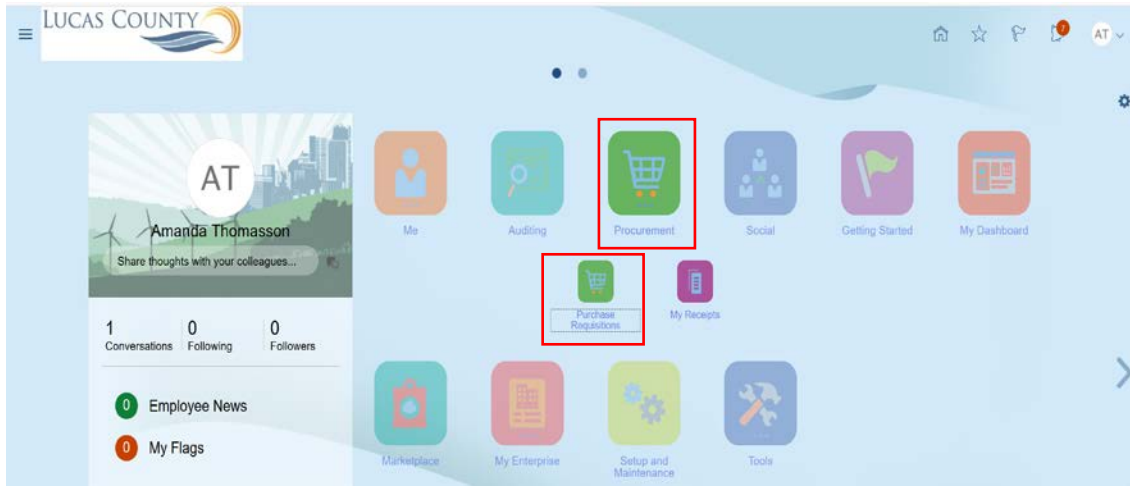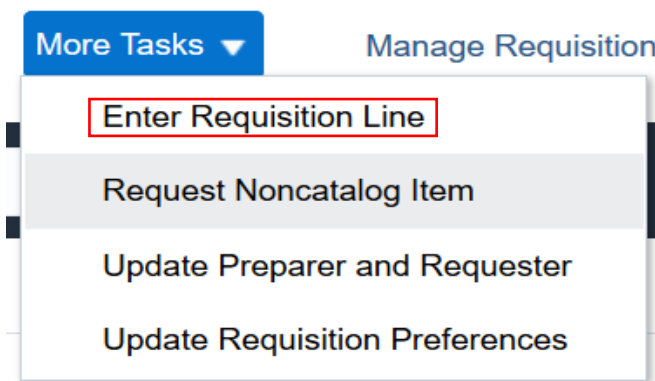
14	Click the **Add to Cart** button.
15	Click the **Shopping Cart Link** and then click the **Review** button.
16	Select Y/N option for ***State Contract - If yes, please insert Contract Number**.
17	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
18	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
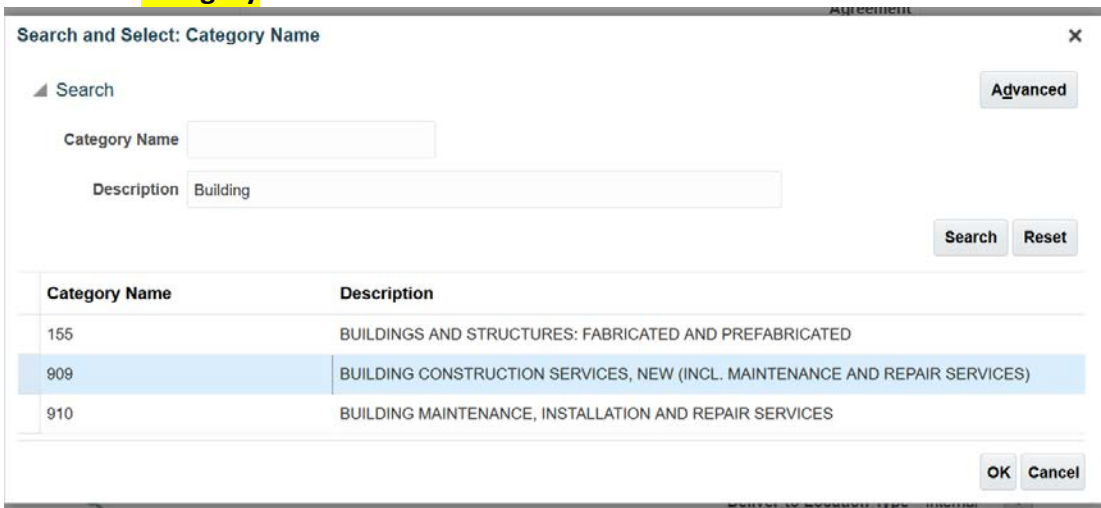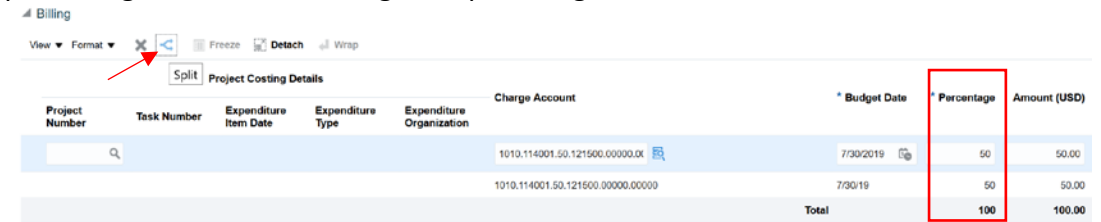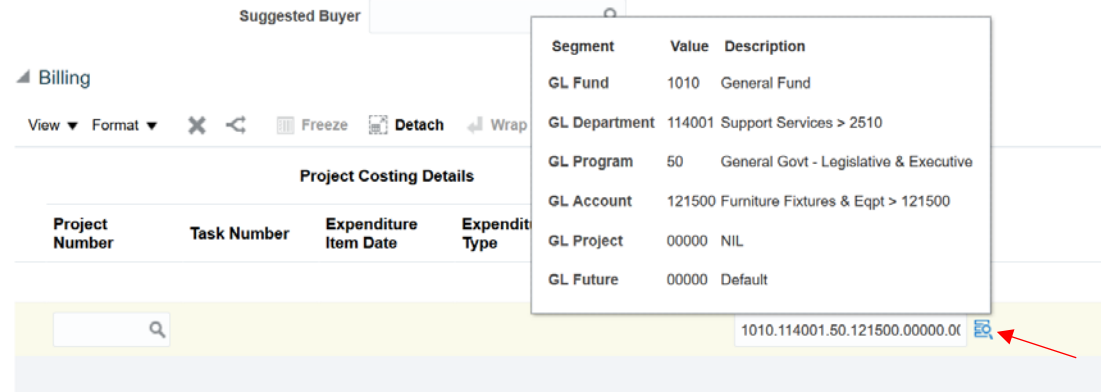
19	Select Y/N *Resolution Attached. (If yes attach resolution).
20	Select Y/N *Will Services be performed on Lucas County property?
21	Select Y/N *Does this purchase require the attachment of the LCIS Checklist? (Any and all cloud, hardware, and or software items that will connect to the Lucas County 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.

Create Requisition with Multiple Charge Accounts

Audience: Requesters

Purpose: The cost of the items is automatically charged to the charge account that your administrator has set up for you or your organization. Normally, you would use this charge account. However, you can create additional distributions of the charges. This is called a split distribution. This job aid will assist you with creating a requisition with multiple charge accounts.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions > More Tasks**
2	Click the **Enter Requisition Line** link.
3	Click the **Line Type** list.
4	Click the **Amount Based** from the drop down list.
5	Click in the Item **Description** field.

6	Enter information into the **Item Description** field.
7	Click the **Search: Category** icon and enter information into the **Description** field.
8	Click the **Search: Category Name** button.
9	Enter information into the **Description** field.
10	Click the **Search** button.
11	Select the **Category**.

12	Click the **OK** button.
13	Click in and enter information into the **Amount** field.
14	Enter 50 into the Billing *Percentage field.
15	Click the **Split** icon under the Billing section. This will allow you to split the cost by percentage or amount among multiple charge accounts.

| 16 | Select the second inserted row and click the ***Charge Account** icon. |
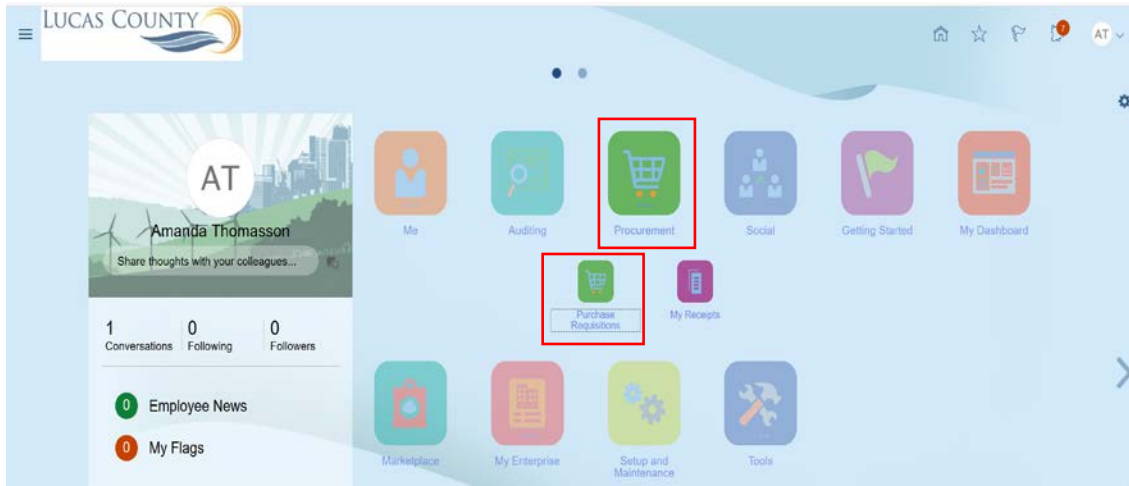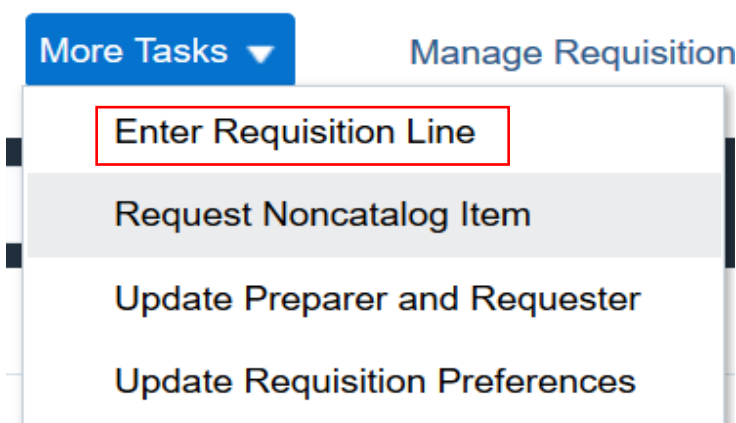
17	Enter applicable **Charge Account** segments.
18	Click **Add to Cart** button.
19	Click the **Shopping Cart** and select **Review** to go to the Edit Requisition page.
20	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
21	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
22	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
23	Select Y/N ***Resolution Attached**.
24	Select Y/N ***Will Services be performed on Lucas County property?**
25	Click the **Check Funds** button.
26	Click the **OK** button.
27	To review the system-generated approval path, click the **Manage Approvals** button.
28	Click the **Back** button.
29	Click the **Submit** button.
30	Click the **OK** button.
31	Click the **Home** button.
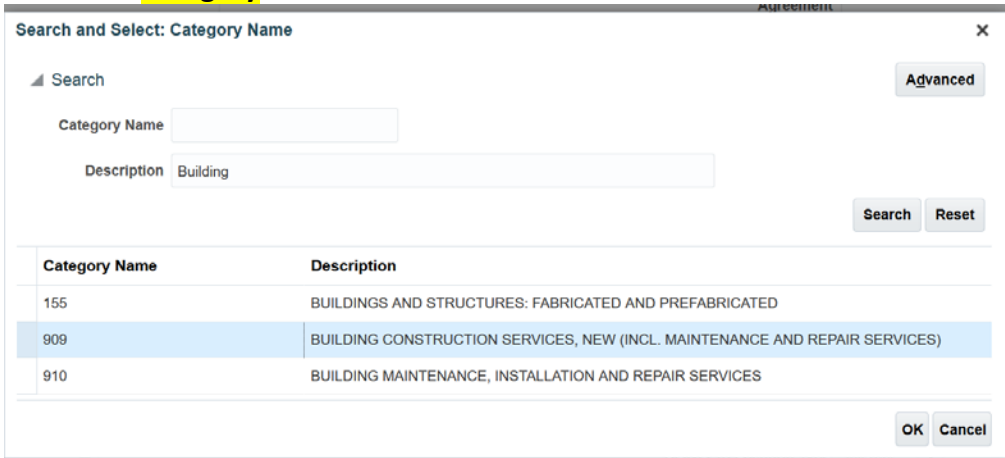
Create Requisition with Multiple Requisition Lines
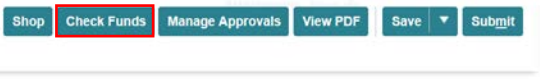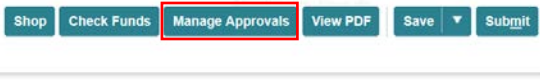
Audience: Requester, Buyer

Purpose: Requisitions can be created with multiple lines, which can be for goods and/or services (amount based). This job aid will walk you through the steps of this task.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions > More Tasks**
2	Click the **Enter Requisition Line** link.
3	Select Goods or Amount Based' from the **Line Type** drop down.
4	Enter **Item Description**.
5	Click the **Search: Category** icon and enter information into the **Description** field.
6	Click the **Search: Category Name** button.

7	Enter information into the ==Description== field.
8	Click the ==Search== button.
9	Select the ==Category==.

10	Enter a ==Quantity==.
11	Select a ==UOM== name = Each.
12	Click in the ==Price== field and add Price.
13	Click the ==Add to Cart== button.
14	Select 'Goods' from the ==Line Type== drop down.
15	Enter ==Item Description==.
16	Select a ==Category Name==.
17	Enter a ==Quantity==.
18	Select a ==UOM== name = Each.
19	Click in the ==Price== field and add Price.
20	Click the ==Add to Cart== button.
21	Click the ==Shopping Cart== Icon.
22	Click ==Review==.
23	Select Y/N option for ==*State Contract - If yes, please insert Contract Number.==
24	Enter if 'Y' is selected enter a number in the ==State Contract Number== field.
25	Select Y/N ==*Sole Source== ("If yes please attach proof of Sole Source").
26	Select Y/N ==*Resolution Attached==.
27	Select Y/N ==*Will Services be performed on Lucas County property?==
28	Select one of the ==Requisition lines==.
29	Click the ==Actions== menu.
31	Select the ==Duplicate== option.

Requisition Lines

Actions ▼ View ▼ Format ▼ [icon] [icon] [icon] Freeze Detach Wrap

Duplicate
Edit
Delete
View Punchout Cart

Total

32	Select the duplicated row and click the **Actions** menu.
33	Select the **Edit** option.
34	Click the **Item Description** field and modify description.
35	Click in the **Price** field and modify price.
36	Click the **OK** button.
37	Click the **Search: Deliver-to Location** icon.
38	Click in the **Name** field and type a partial name.
39	Click in the **Search** button.
40	Select the Deliver-to Location in the **Name** cell.
41	Click the **OK** button.
42	Click the **Save** button.

43	Click the **Check Funds** button.
44	Click the **OK** button.
45	Click the **Manage Approvals** button.
46	Click the **Back** button.
47	Click the **Submit** button.
48	Click the **OK** button.

Duplicate Requisition

Audience: Requester

Purpose: Existing requisitions that are not in an incomplete status may be copied/duplicated into a new requisition starting from the Manage Requisitions page. This allows all previous line detail to be carried into the new requisition, reducing the amount of time to create requisitions for items that are ordered repeatedly. The new requisition details can be then edited accordingly before submission.

NOTE: Punchout requisitions cannot be duplicated.

Step	Action
	Create requisition copied from another requisition.
1	Log into Oracle. **Home Page -> Procurement >Purchase Requisitions -> Manage Requisitions**
2	Within the Requisitions page, click the **Manage Requisitions** link.

	By default, all your requisitions display in a list. You can search by multiple criteria: BU, Requisition number, Description, Date created, status, requester, supplier, order, or item that should be included on the requisition you search for. To search, you would enter or select the search criteria from available fields, and click the ==Search== button. Alternatively, you can select from the displayed requisitions by clicking the requisition line in the list. Click the links/line of the ==Requisition== number and ==Description== you wish to copy.
3	The Requisition displays. Click the ==Actions== menu.

Note: If the items in the requisition were used for items from a punchout site such as Grainger or Staples, these lines cannot be duplicated, but could possibly be easily replicated using a shopping list or favorites in the punchout site.

4	Click **Duplicate** from the menu.
5	Select **Create New Requisition**.
6	The **Create Requisition** page displays that includes the line items and information from the previous requisition, including the Description. If desired, you can create a new description for your requisition, highlight the **Description** field and press the [**Delete**] button on your keyboard, and enter a new description.
8	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
9	Enter if 'Y' is selected in step 10 enter a number in the **State Contract Number** field.
10	Select Y/N ***Sole Source ("If yes please attach proof of Sole Source").**
11	Select Y/N ***Resolution Attached.**
12	Select Y/N ***Will Services be performed on Lucas County property?**
13	Select Y/N ***Does this purchase require the attachment of the LCIS Checklist?** (If yes, lease attach the checklist in the attachments section of the requisition.).
14	Review the **Requester** field and make changes if needed.
15	Click in the ***Quantity** field(s), and enter the desired quantity of the item(s) if different than the quantities brought into this requisition from the duplicated one.

16	Click in the ***Amount** field(s), and enter the dollar amount for the item(s) if different than the amount brought into this requisition from the duplicated one.
17	In the **Line Details**, validate and edit **Delivery** (date and location), **Billing**, **Notes and attachments**, and **Source** information only if different from what was copied.

18	Click the **Save** button.

18	Click the **Check Funds** button.

19	Click the **OK** button.
20	Click the **Manage Approvals** button.
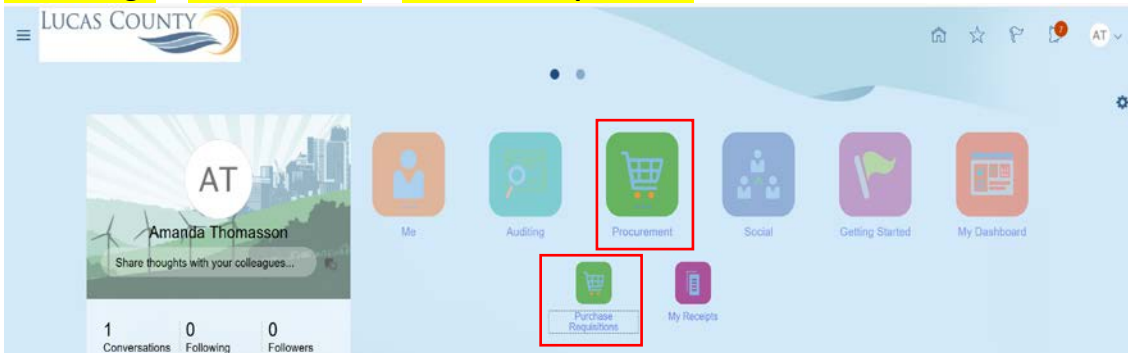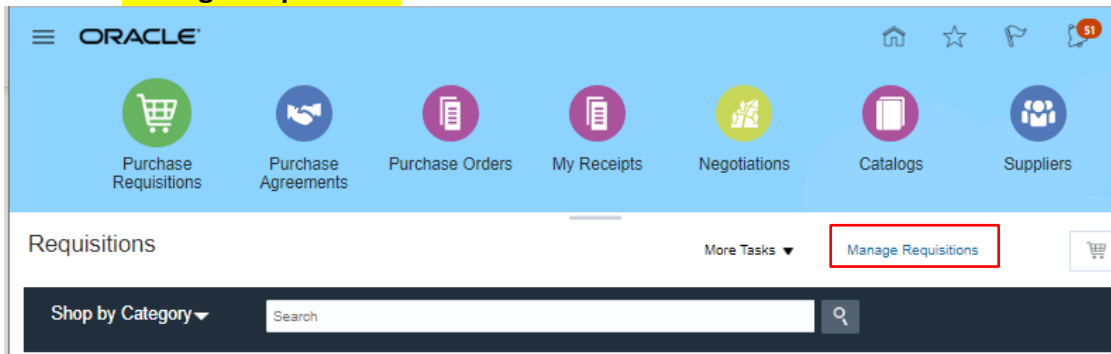
| 21 | When all is completed, click the **Submit** button. |
| 22 | Click the **OK** button to acknowledge submission of the requisition. |

Delete Requisition

Audience: Requester

Purpose: This job aid will assist you with deleting a requisition. If the requisition line status is "Incomplete", the line is eligible to be marked for deletion. When you click **Save** and **Close**, the line is deleted. If you delete a line for which the status is not incomplete, the **Cancel** operation is completed before you save and close.

Step	Action
1	Log into Oracle. **Home Page**-> **Procurement** -> **Purchase Requisitions**
2	Click the **Manage Requisitions** link.
3	You can either view the entire list of requisitions, or search by status. You may delete requisitions in "Incomplete" status. For this example, use the Search fields in the Manage Requisition page to search based on Incomplete status. Select **Incomplete** from the **Status** dropdown list, and click the **Search** button.

4	Highlight the requisition that is to be deleted.
5	Click the **Actions** drop-down list, and select **Delete**.
6	Click the **Yes** button to confirm the action.
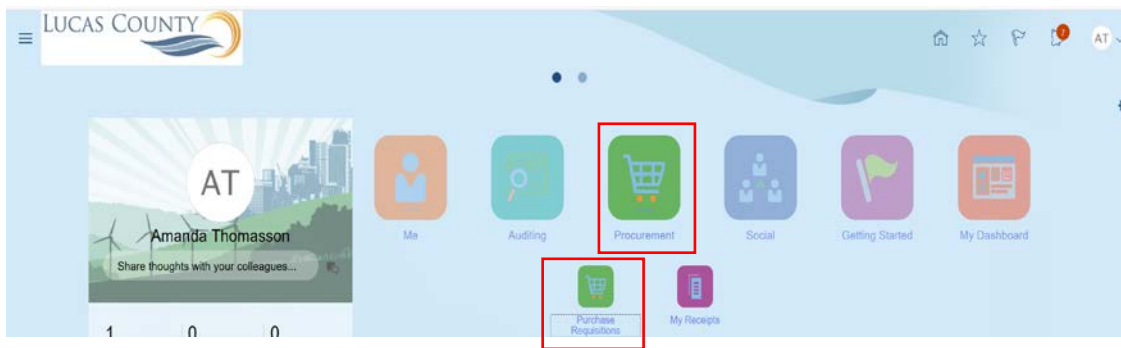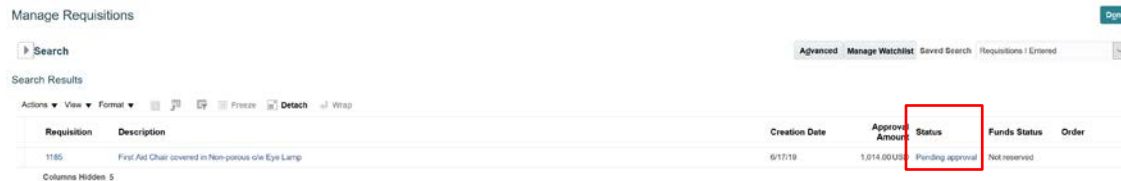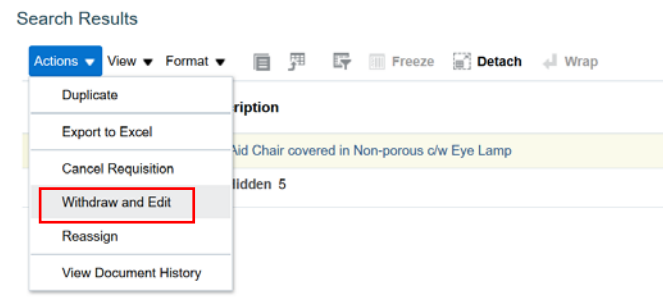
Edit Requisition

Audience: Requesters

Purpose: This job aid will assist you with withdrawing and editing a requisition pending approval.

Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions**
2	Click the **Manage Requisitions** link to view details of requisitions you created.
3	Click the **Status** list to search for a Requisition in 'Pending Approval' status.
4	Highlight the **Pending** approval list item.
5	Click the **Actions** drop-down list.
6	Click the **Withdraw and Edit** menu item.
7	A warning message will be displayed. Click the **Yes** button to continue.
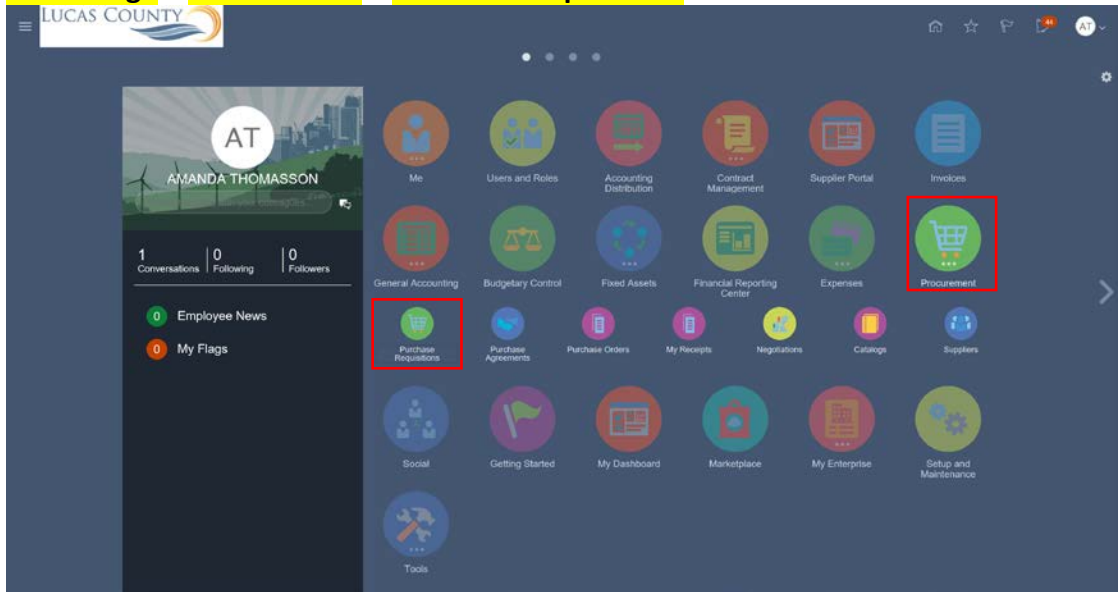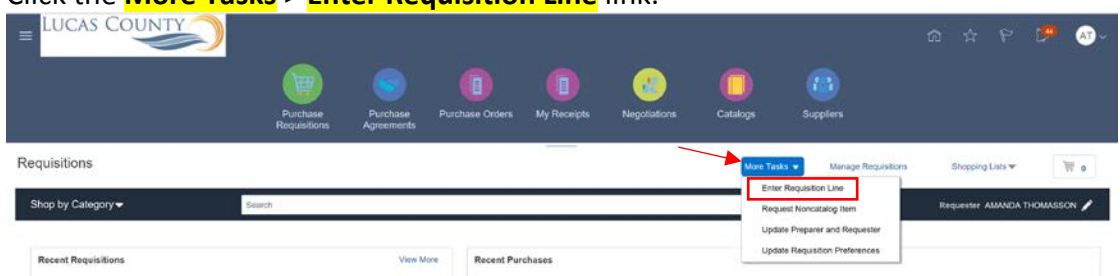
Warning ✕

This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.

Do you want to continue?

Yes   No

8	Click on the **Quantity** field and update with a new quantity.
9	Click the **Save** button.
10	Click the **Submit** button.
11	Click the **OK** button.

Add Approver to Requisition Approval Path

Audience: Requester, Approver

Purpose: Your company policies determine the approver for your requisition. You cannot change the default approver list, but if you have been given access you can add approvers. You cannot delete system generated approvers. You can add approvers anywhere within your existing approval list. For example, your existing approval list is Manager A, Manager B, and then Manager C. You add Manager X. The approval now routes through Managers A, B, C, and then X, stopping at X. This job aid will provide steps to add an approver to the approval path.

Department policy determines who has authority to approve your requisition(s). System generated approvers cannot be deleted, but approvers can be added anywhere within your approval list per requisition.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link.
3	Click the **Line Type** list.

4	Select the **Goods** list item.
5	Click in the **Item Description** field.
6	Enter information into the **Item Description** field.
7	Click in the **Category Name** field.
8	Click the **Search icon**: by the **Category Name** field.
9	Click in the **Category Name** field.
10	Enter **Category Number** into **Category Name** field if known

11	Click **Advance button** to search for Category Number/Description
12	Use the **Does not equal,** to get a list of all Category Name/Description
13	Enter information into the **Description** or **Category** fields.
14	Click the **Search** button.
15	Make a selection from the search results list.

16	Click the **OK** button.
17	Click in the **Quantity** field.
18	Enter information into the **Quantity** field.
19	Click in the **UOM** field.
20	Enter information into the **UOM** field.
21	Click the **EA Quantity** Each list item.
22	Click in the **Price** field.
23	Enter information into the **Price** field.
24	Click in the **Currency** field.
25	Click the **Charge Account** icon and either accept default or add new applicable charge account information.
26	In the Notes and Attachments section, click the **+** icon next to **Attachments None**.
27	In the Attachments window click the **Type** list.
28	Select the **File** list item.
29	Click the **Category** list.
30	Click to select the **To Buyer** list item.
31	Click the **Browse** button under ***File Name or URL** field.
32	Select a file for **Attachment**.
33	Click in the **Title** field.
34	Enter information into the **Title** field.

35	Click in the **Description** field and enter information into the **Description** field.
36	Click the **Add to Cart** button.

37	Click Shopping Cart icon and select **Review.**

38	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
39	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
40	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
41	Select Y/N ***Resolution Attached**.
42	Select Y/N ***Will Services be performed on Lucas County property?**
43	Click the **Check Funds** button.
44	Click the **View Funds Check Results** button.
45	Click the **Done** button.
46	Click the **OK** button.
47	Click the **Manage Approvals** button.

48	The **Manage Approvals** page is displayed, showing the approval path.

Manage Approvals (Requisition 1195)

Section	Stage or Participant
1	◢ 🔲 Header Preapproval Stage
1.1	👓 Amanda Thomasson - Requester FYI
1.2	◢ 🔳 Parallel
1.2.1	◢ 🔳 Pre Approval Header First Responder Wins
1.2.1.1	👤 Amanda Thomasson - Pre Approval Header First Responder Wins
1.2.1.2	👤 Ruth Ashford - Pre Approval Header First Responder Wins
2	▶ 🔲 Header Stage
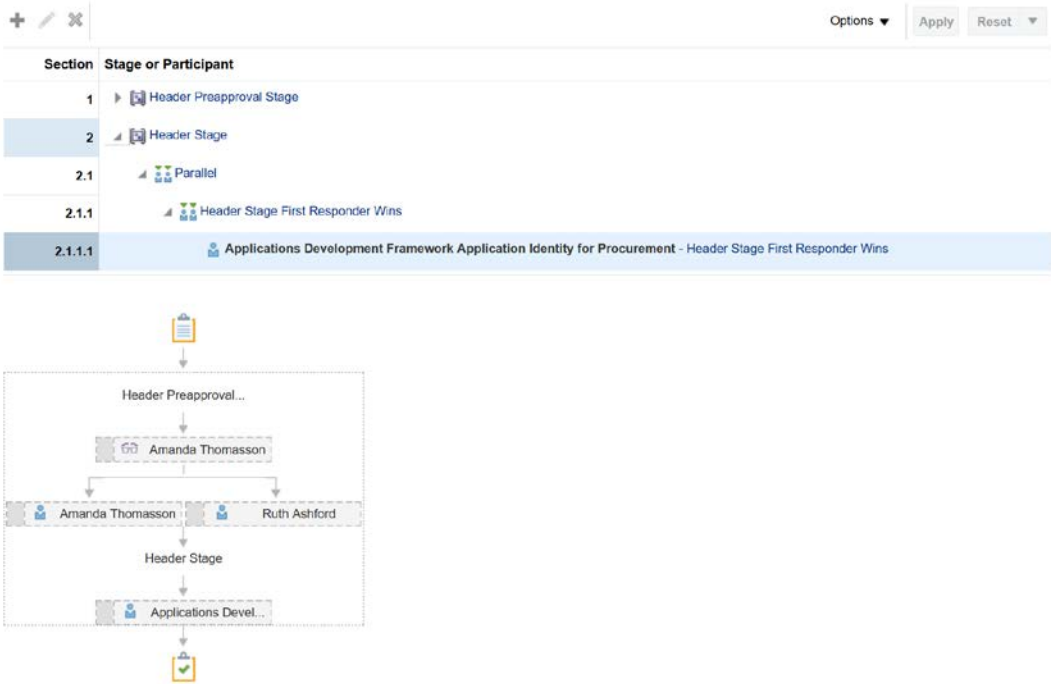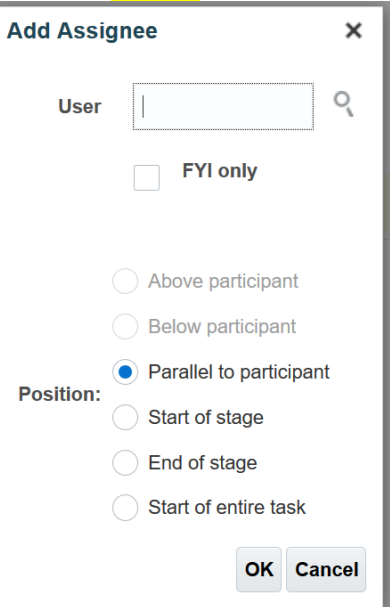
Adding additional approvers is allowed at certain stages. Drill down into the **'Header Stage'**.

Click the ==Expand== button.

Section	Stage or Participant
1	◢ 🔲 **Header Preapproval Stage**
1.1	👓 **Amanda Thomasson** - Requester FYI
1.2	◢ 🔳 **Parallel**
1.2.1	◢ 🔳 **Pre Approval Header First Responder Wins**
1.2.1.1	👤 **Amanda Thomasson** - Pre Approval Header First Responder Wins
1.2.1.2	👤 **Ruth Ashford** - Pre Approval Header First Responder Wins
2	▶ 🔲 **Header Stage**

49	Drill down again by clicking the ==Expand== button.
50	Highlight the row under ==**Header Stage First Responder Wins**==.

Manage Approvals (Requisition 1195)

Section	Stage or Participant
1	▶ Header Preapproval Stage
2	◢ Header Stage
2.1	◢ Parallel
2.1.1	◢ Header Stage First Responder Wins
2.1.1.1	Applications Development Framework Application Identity for Procurement - Header Stage First Responder Wins

50	Click the **'+'** sign to begin adding an approver. Click the **Search** icon for User in the **Add Assignee** window.
51	Select the **Approver User ID**.
52	Select a **Position** (Start of Stage) and click **Ok.**
53	Enter the first name of the **Approver** to be inserted.
54	Make a note of where the user was inserted into the approval path.
55	Enter the **Last Name of the Approver** to be inserted.

56	Click the **Apply** button.	
57	Click the **Back** button.	
58	Click the **Submit** button.	
59	Click the **OK** button to confirm.	
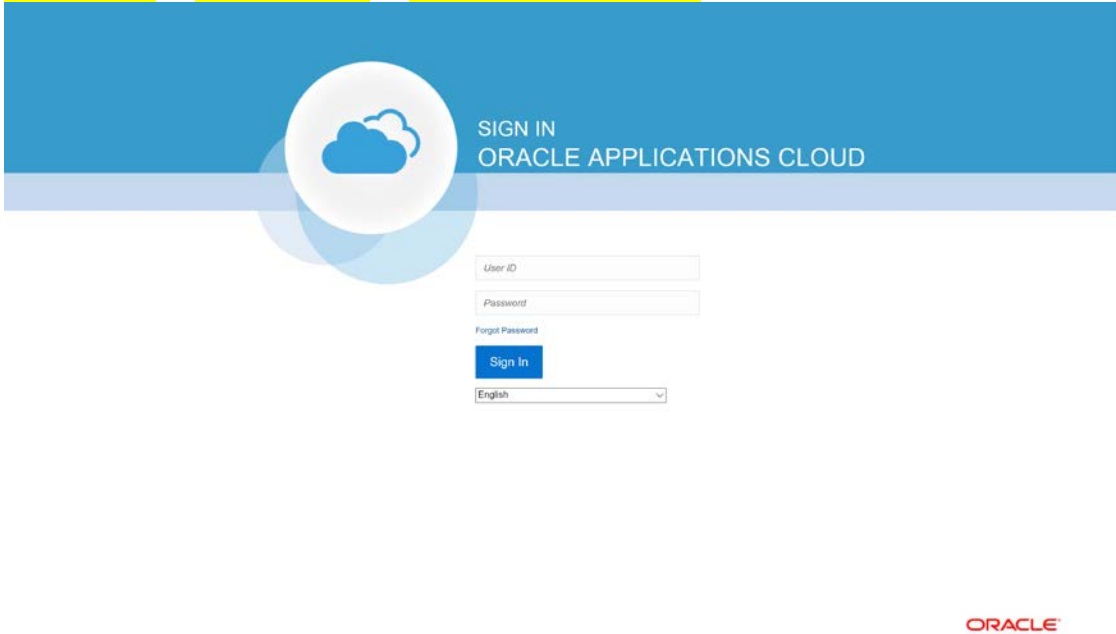
Cancel Requisition

Audience: Requester

Purpose: After a requisition has been created, you can cancel Incomplete requisitions.

The purchase order contains the most up-to-date information. This job aid will assist you in canceling a requisition.

Afterwards, you can track or change your request in the following way. For requisitions on approved purchase orders, your changes are made to the purchase order through change requests. From the **Requisition Details** page, you can access pending change requests until they are approved. You can also access the latest version of the purchase order. From the **Document History** page, you can view all submitted change requests to the purchase orders associated with the requisition. Cancellation of lines on purchase orders are also handled through change requests. Changes to purchase orders are not reflected on the requisition.

Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions** SIGN IN ORACLE APPLICATIONS CLOUD User ID Password Forgot Password Sign In English ORACLE Copyright(C) 2011, 2016, Oracle and/or its affiliates. All rights reserved.
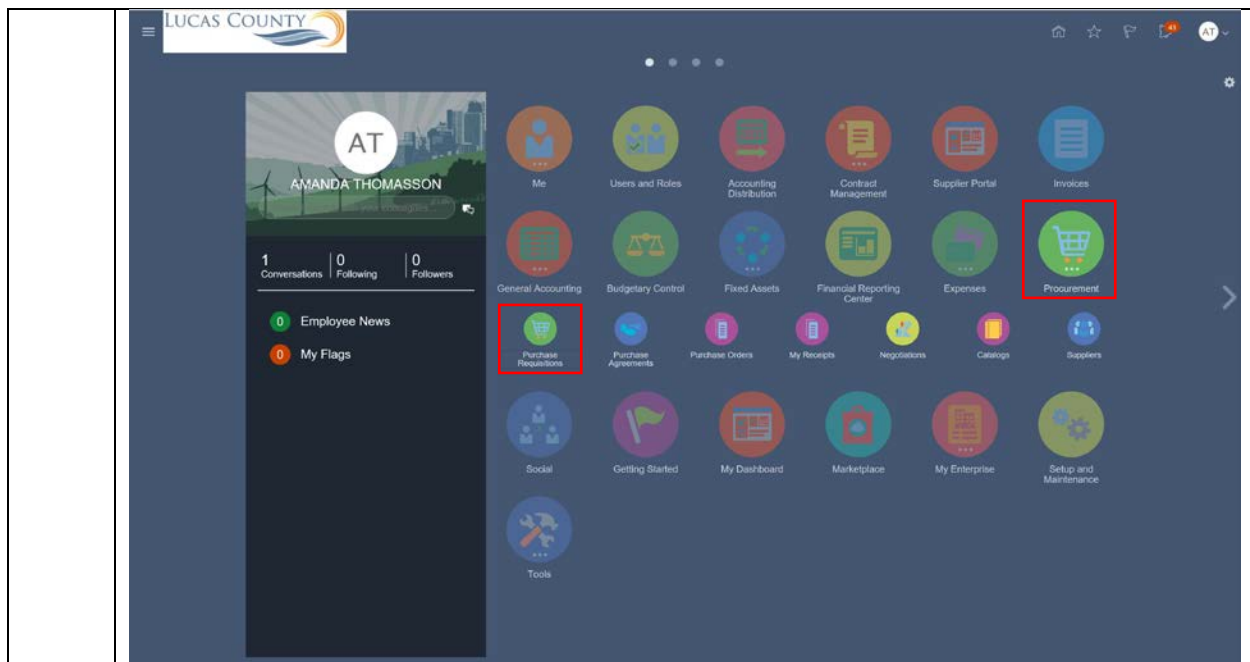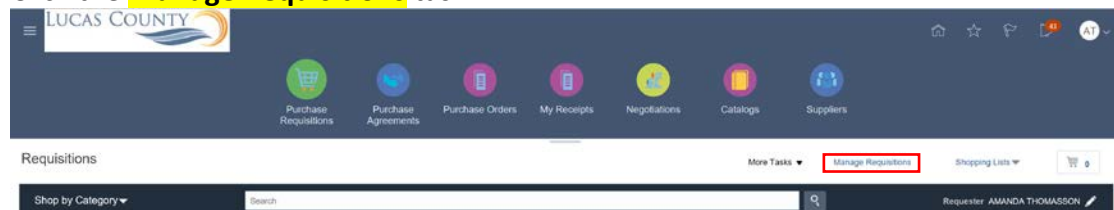
2	Click the **Manage Requisitions** task.
3	Select the Requisition row for the requisition record you are trying to cancel.

4	Click the **Actions** drop-down list.
5	Click the **Cancel Requisition** menu item.

6	Enter information into the ==Reason== field.
	![Manage Requisitions screen with Cancel Requisition dialog, Reason field "Incorrect order" and OK button highlighted]
7	Click the ==OK== button.
8	Click the ==OK== button for the confirmation message.
	![Manage Requisitions screen with Confirmation dialog "The requisition lines were canceled or cancellation requests were submitted for the lines." and OK button highlighted]
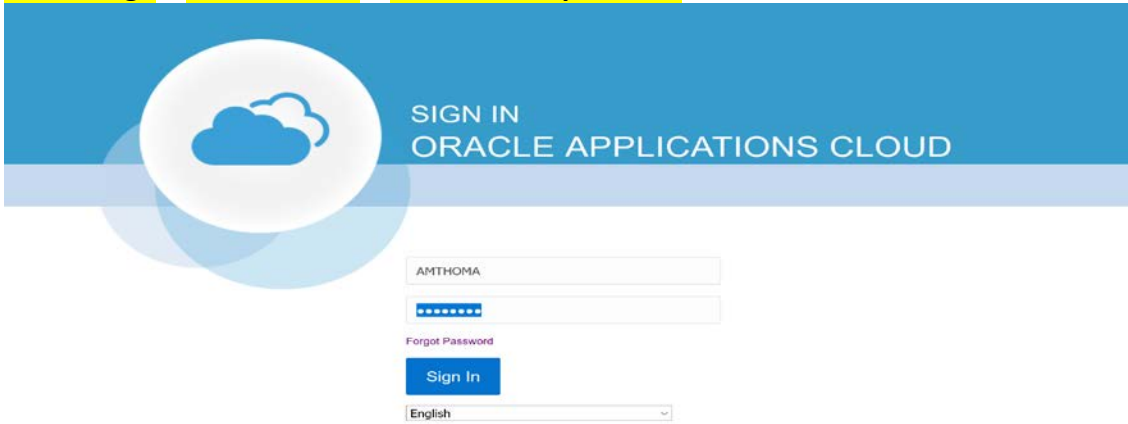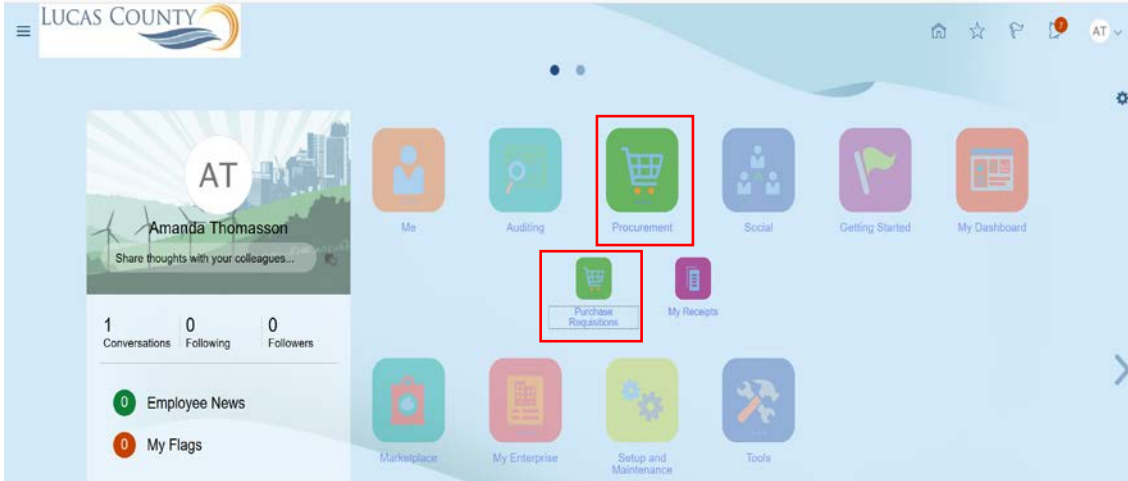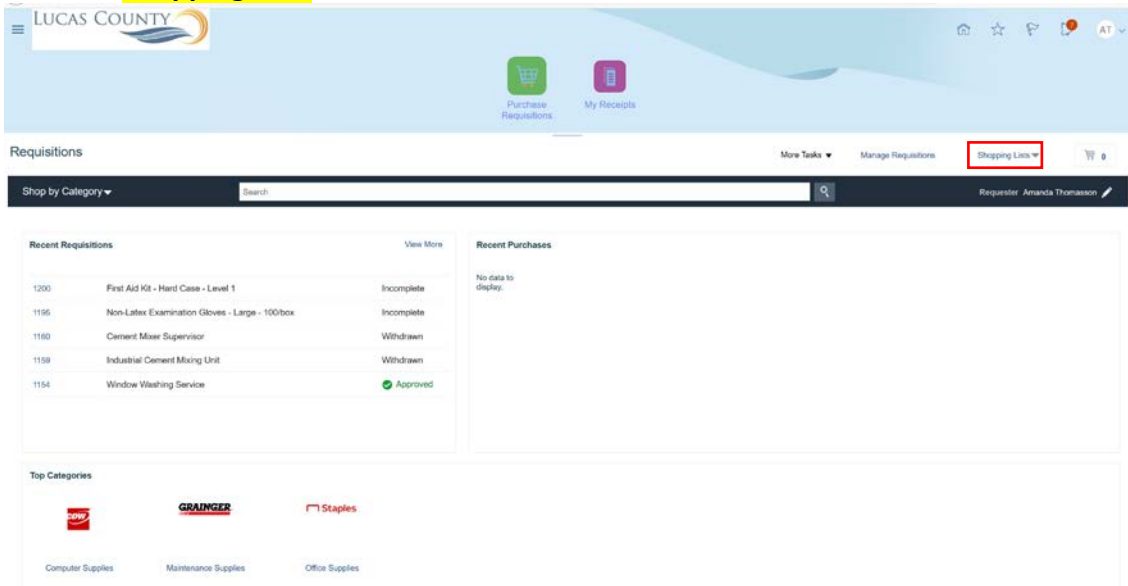
Create Personal Shopping List as a Requester

Audience: Requester, Buyer

Purpose: A shopping list is a collection of items created by preparers or requesters. Shopping lists allow you to quickly requisition items that you order frequently.

When adding an item to a shopping list in the Add to Shopping List dialog, you can create a new list easily. In the **Shopping Lists** page, click **Manage My Shopping Lists** and create a new personal shopping list. Items can be added to a personal shopping list in a number of ways. In the **Shopping Lists** page, view a shopping list by selecting it from **My Shopping Lists**. Select items in the list and click **Add to Another Shopping List**. Alternatively, when viewing an item after searching or comparing, select **Add to Shopping List** from the item's menu. This job aid will assist you with creating a personal shopping list as a Requester.

Step	Action
1	Log into Oracle **Home Page > Procurement > Purchase Requisitions**

2	Click the **Shopping Lists** link.
3	Click the **Create Shopping List** button.
4	The **Manage My Shopping Lists** Window appears. The '+' icon represents adding a row. Click the **Add Row** button.
5	Add a description and click **Save and Close**.
6	Click in and enter information into the **Search** field.
7	Click the **Search** button.

8	From the catalog entries appearing in the search list, select each item to be added to the personal shopping list. Hold the **Ctrl** key as you click each item to select multiple items.
9	Click the **Add to Shopping List** menu.
10	Select the name of the shopping list to be added to from the drop-down list. Click **Save and Close**.
11	Note the confirmation message. Click the **OK** button.
12	Navigate to the **Shopping Lists** menu and click the link to select the saved shopping list from the menu selection.
13	From the items in the list, select each item to be added to the requisition. Hold the **Ctrl** key as you click each item to select multiple items.

14	Click the **Add to Cart** button.
15	Click the **Shopping Cart** icon and click the **Review** button.
16	Review the items added to the requisition from the shopping list.

Compare Items

Audience: Requesters, Buyers

Purpose: When searching for items from the catalog, the Search Results page shows all items that match the search words that you entered. To help you better select an item, you can compare items for variables such as price and supplier information.

Comparing Items is only used for comparing internal catalog items.

Step	Action
1	Log into Oracle **Home Page > Procurement > Purchase Requisitions**
2	Search for the first item. Click in the **Search** field and type description of an item for comparison.
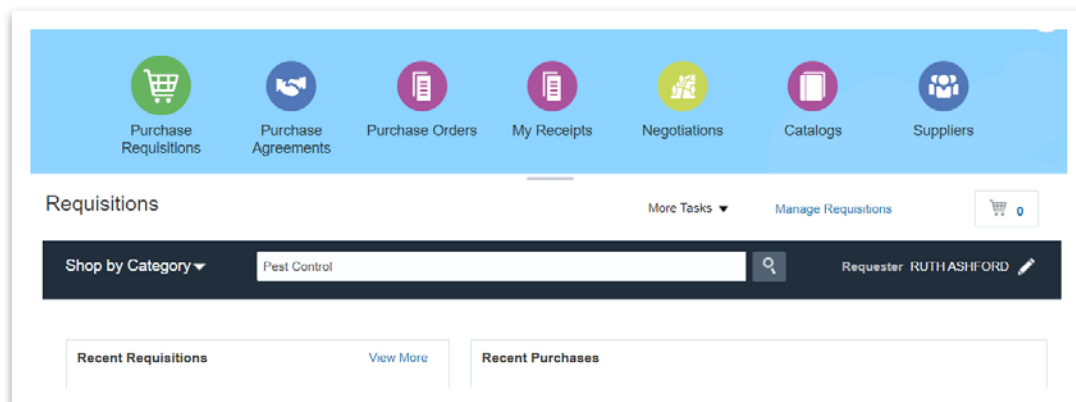
For this example, type in "**Pest Control**".

3	Click the [🔍] **Search** button. Alternatively, you can click the **Enter** button on your keyboard.
4	From the list of results, click to select a line item and click the **Add to Compare** button.
5	The **Compare Products** banner displays in the Search Results window, awaiting another item to compare.
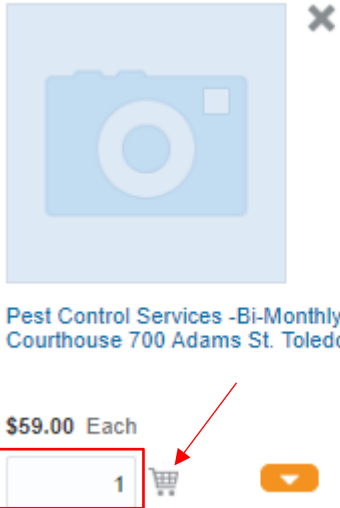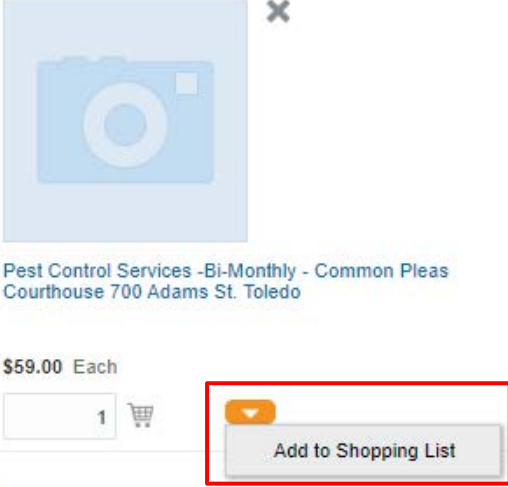
You can enter another item name, and click the Search button as before to search for second item, or select from the list results of the existing search. For this example, click another item row.

6	Click the **Add to Compare** button.
	The icons for compared items display side by side in the **Compare Products** banner.
7	Click the **Compare** button within the banner to compare and display attributes of the selected items. Comparison details can include the item price, description, and if an item is on a blanket (indicated by the fact a supplier exists for the item). **Note**: Not all comparison information may be available.

Compare Products

	Pest Control Services -Bi-Monthly - Common Pleas Courthouse 700 Adams St. Toledo	Pest Control Services -Emergency Service -Common Pleas Courthouse 700 Adams St. Toledo
	$59.00 Each	$59.00 Each
	1	1
Long Description		
Category Name	675	675
Supplier	Action Pest Control, Inc.	Action Pest Control, Inc.
Supplier Item		
Brand		
Manufacturer Part Number		
Price Breaks	No	No
Supplier Item Auxiliary Identifier		
Item		
Revision		
Agreement	19004	19004
Availability		
Lead Time Days		
UNSPSC		
Alias		

8	Based on the information displayed, you can update the quantity if desired (greater than the defaulted 1), and click the 🛒 **Add to Cart** button for the item you wish to order. Upon clicking the Shopping Cart icon beside the quantity, a quick message will display advising of the addition to the cart.

Note: Alternatively, you can use the dropdown arrow to add the item to a Shopping List if desired.

| 9 | Click the ==Shopping Cart== icon within the requisition window to see a quick view of details. |
| 10 | Please click the ==Review== button to provide additional required details. |

11	Provide a required ==Description== for your requisition. A default is provided by default. Edit Requisition: 1047 Requisitioning BU Lucas County * Description supplies * State Contract - If yes, please insert Contract Number No ▼
12	There are considerations and additional attachments that may be required depending on whether the item is attached to a state contract, is an item of sole source, or if services, those that will be performed onsite at Lucas County property. If on **State Contract**, please select ==Yes== from the dropdown arrow, then note the State Contract Number. If item is on record as a **Sole Source,** please indicate yes, and select ==Yes== to Resolution Attached, then ensure you provide proof of Sole Source as an attachment to the requisition. If a **Service** is being requisitioned that will **be performed on Lucas County property**, please select ==Yes== and then please attach a current Bureau of Workers Compensation Policy and Insurance Certificate of Liability. For this example, select **No** for the following fields, indicating no attachments would be required for justification of those criteria. * State Contract - If yes, please insert Contract Number No ▼ State Contract Number * Sole Source - If yes please attach proof of Sole Source No ▼ * Resolution Attached No ▼ * Will Services be performed on Lucas County property? No ▼
	Review Requisition lines. The quantities can be edited by entering another quantity directly into the ==Quantity== field, and lines can be deleted at this point using the ==X== indicated at the end of the lines.

	Requisition Lines Actions ▼ View ▼ Format ▼ ▣ 🖉 ✖ ▥ Freeze ▦ Detach ⊣ Wrap | Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete
1	Pest Control Service	675	1	Each	59.00 USD	59.00	Not reserved	✖
Total						59.00			 Rows Selected 1 Columns Hidden 8
	To add an attachment that may have been indicated above, such as current Bureau of Workers Compensation Policy and Insurance Certificate of Liability, see the **Attachments** button in the **Notes and Attachments** section of the Requisition window. ◢ Notes and Attachments Note to Supplier [ ] Attachments None ✚ In the Attachments window, using the dropdown menus select the ***File* Type**, a **Category** of Internal to Requisitions, Miscellaneous, To Approver, To Buyer, To Receiver, or to Supplier. For a Certificate of Liability, select ***Internal to Requisitions***. Then use the **Choose File** button to locate the file to be attached from a local drive on your computer. Click the **OK** button in the Attachments pane. **Attachments** ✖ Actions ▼ View ▼ ✚ ✖ 	Type	Category	* File Name or URL	Title	Description	Attached By
File ▼	Internal to Re ▼	Choose File No file chosen	Liability Cert		RUTH ASHFC	 Rows Selected 1 OK Cancel The attachment title entered will display in the **Attachments** section and will be evident to the requisition. ◢ Notes and Attachments Note to Supplier [ ] Attachments Liability Cert ✚ ✖
10	If you wish to submit the requisition at this time, you can click the **Submit** button. If you wish to continue building the requisition at this time, you can click the **Save** button.
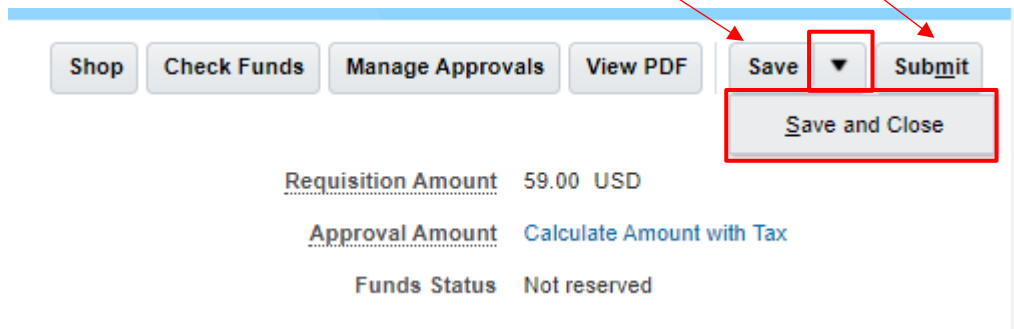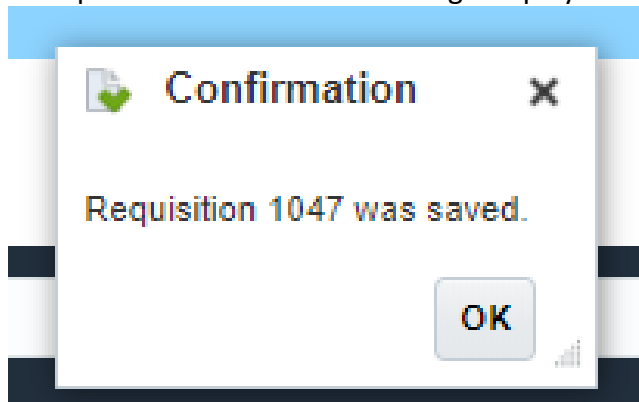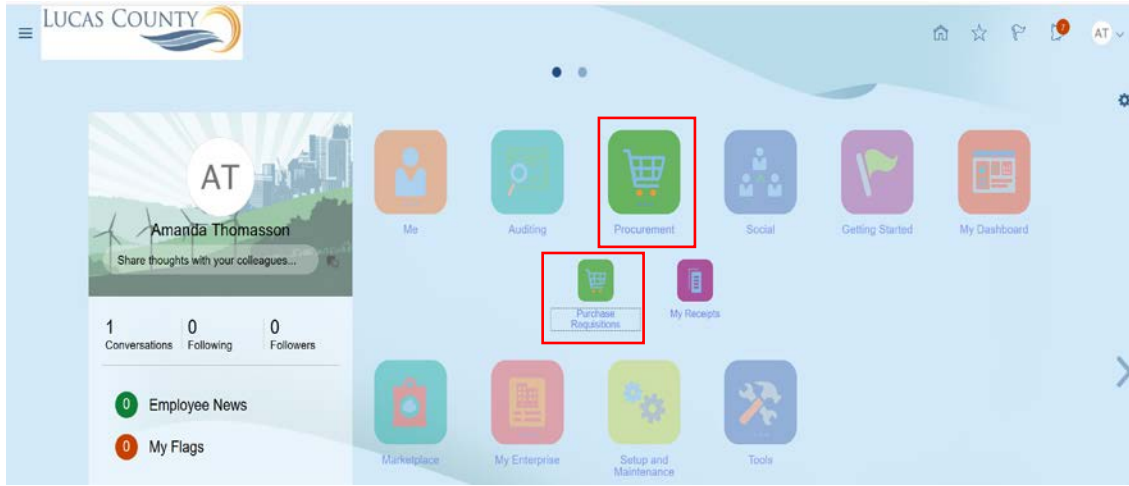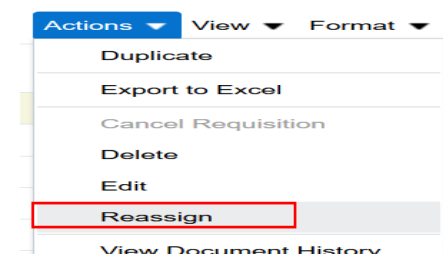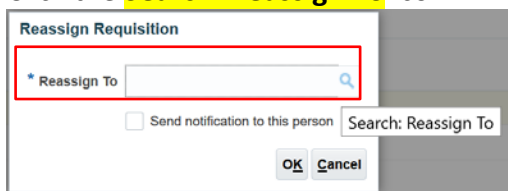
	If you wish to save your progress now and finish the requisition at a later time, then click the **Save and Close** button. For this example, we will save and close. ![Shop, Check Funds, Manage Approvals, View PDF, Save dropdown with Save and Close, Submit buttons shown] Requisition Amount 59.00 USD Approval Amount Calculate Amount with Tax Funds Status Not reserved
11	A Requisition Confirmation message displays. **Confirmation** ✕ Requisition 1047 was saved. OK Click the **OK** button to acknowledge that the requisition was saved.
12	If comparison of items is concluded, click the **Clear** button to close the Comparison. Otherwise, you could continue to compare items using the **Compare** button. Information and Tips • Contract Purchase - Services Compare Purchasing Procedu Clear

Forward Requisition

Audience: Requesters

Purpose: You can reassign a requisition to another requester. This job aid will guide you through that process.

Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions**
2	Click the **Manage Requisitions** link.
3	Select a **Requisition** from the list that you wish to reassign.
4	Click the **Actions** menu.
5	Click the **Reassign** option.
6	Click the **Search: Reassign To** icon.
7	Click in the **Name** field and type the last name of the approver and click search.

8	Click to highlight approver for reassignment and click Ok.
9	Click the checkbox for **Send notification to this person** reassigned and then click the Ok button.
10	Confirmation is displayed.
11	Click the OK button to confirm.
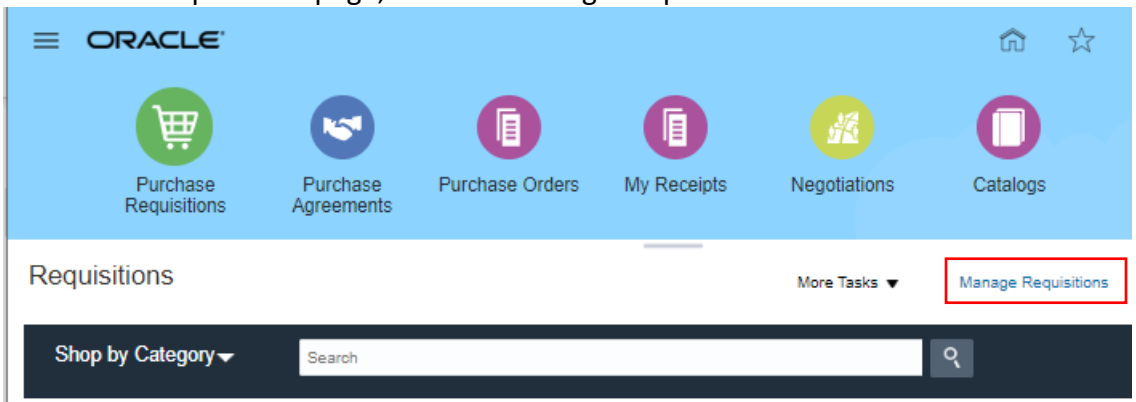
Managing Requisitions
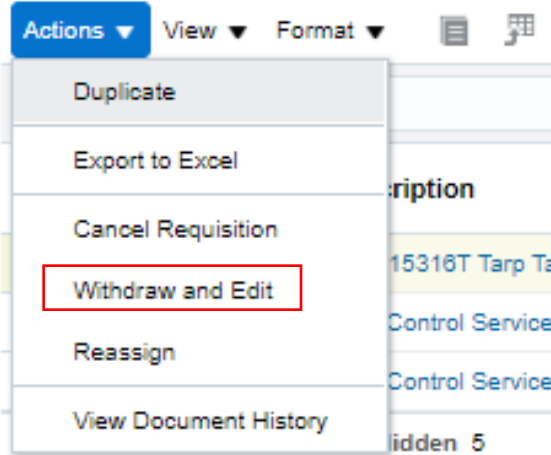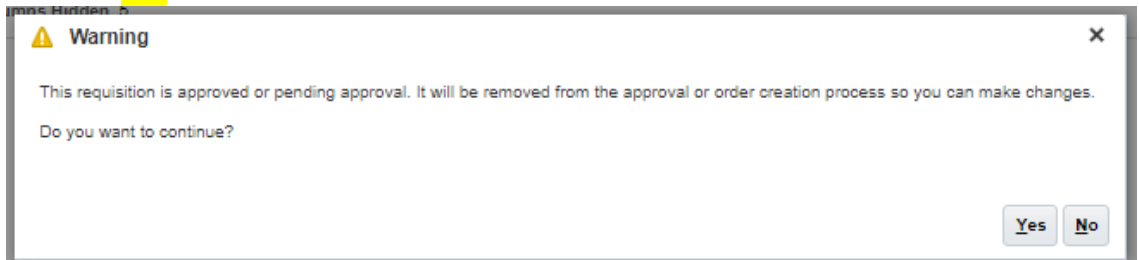
Audience: Requester

Purpose: Primary tasks included in Managing Requisitions include creating a requisition, updating a draft requisition, approve, amending and tracking progress of requisitions.

Step	Action
1	Log into Oracle **Home Page -> Procurement -> Purchase Requisitions**
2	Within the Requisitions page, click the Manage Requisitions link. **NOTE:** You can either view the entire list of requisitions which displays by default, or search by status. You may delete requisitions in "Incomplete" status. For this example, use the Search fields in the Manage Requisition page to search based on Pending

	Approval status to display only those requisitions not yet approved. Select Pending Approval from the Status dropdown list, and click the Search button
3	Click the **Search** button.
4	The Search Results narrow to only those meeting your status selection. Make a requisition selection by clicking a line.
5	**NOTE:** "First, ensure you have selected a line to take action. Actions will populate dependent on what you select."
	For this example, we will edit a requisition and resubmit for approval.
6	Click the **Withdraw and Edit** menu item.

7	A warning notice advises this requisition will be removed from approval workflow in order to allow you to make changes, and asks if you wish to continue. To continue, click the **Yes** button.
8	To modify the details, click in the editable fields and modify accordingly. For this example, you will update the quantity. Click on the **Quantity** field and adjust the quantity.

9	After making all required edits necessary, click the Save button to confirm the entries.
10	Click the Submit button. The requisition will be resubmitted for approval.
11	Confirmation of the submission displays. You can View a pdf, or simply click OK to acknowledge. Click the OK button.
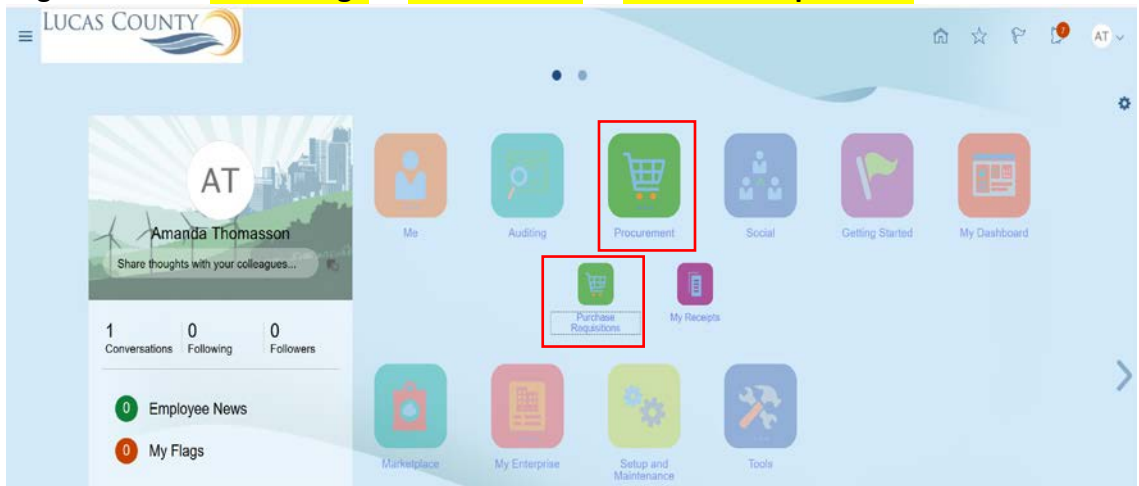
Requisitions Approval from System Notification

Audience: Requesters, Approvers

Purpose: The system will deliver a notification to your email inbox of record when you have actions to take on requisitions. This includes approving a requisition. This job aid will assist you with approving a requisition from a notification within Oracle (and from an email notification).

Step	Action
1	Log into Oracle. **Home Page -> Procurement -> Purchase Requisitions**
2	Click the ***Notifications*** (Bell icon) at the top right of the page.
3	Select **Notification: Action Required Approve Requisition.**
4	Once you have reviewed the requisition, click the **Approve** button.

Requisitions Approval from Email

Audience: Approver

Purpose: You can approve a requisition directly from a link in an email requesting approval.

Step	Action
1	Log into your Email. Select and open the email notification request for approval.
2	View details in the email.

3	In the Action Required section, if attached, click the **PDF** file listed to review the details.	

Action Required: Approve Requisition 107

MR Michael Rath <eieb-dev1.fa.sender@workflow.mail.us6.oraclecloud.com>
To ⭕ Lucascounty1@outlook.com

📄 **PDF** 107.pdf
51 KB ⌄
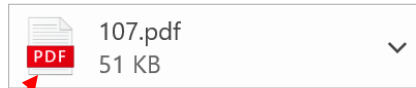
Lines

Pest Control Services -Monthly -Vehicle Maintenance $19.00
644 State St. Toledo

1 x $19.00
Charge Account: 1010.114001.50.630007.00000.00000

Approval History

⭕ **DIANE ROBINSON**

⭕ **Applications Development Framework Application Identity for Procurement**

8/22/19 8:15 AM
🕒 Assigned to **AMANDA THOMASSON**

8/22/19 8:15 AM
🕒 Assigned to **RUTH ASHFORD**

8/22/19 8:15 AM
⬆ Submitted by **Michael Rath**
📎107.pdf

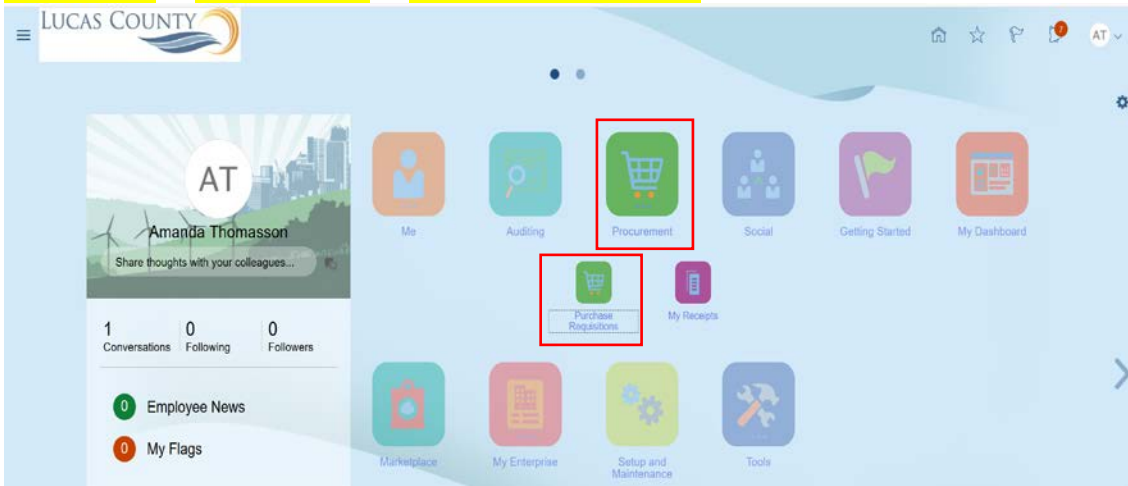| 4	Based on your review the details of the PDF attachment, determine if you wish to approve the requisition.
	LUCAS COUNTY Requisition 107 (19 USD) Report Date 08/22/2019 12:15 PM GMT+00:00 Page 1 of 1 **Requisitioning BU** Lucas County **Requisition Amount** 19 USD **Entered By** Michael Rath **Approval Amount** 19 USD **Status** Pending approval **Procurement Card** **Description** Pest Control Services - Monthly -Vehicle Maintenance 644 State St. Toledo **Justification** **Emergency Requisition** No **Funds Status** Not reserved **Lines** <table><tr><th>Line</th><th>Item</th><th>Description</th><th>Category Name</th><th>Quantity</th><th>UOM</th><th>Price</th><th>Amount (USD)</th><th>Status</th><th>Funds Status</th></tr><tr><td>1</td><td></td><td>Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo</td><td>675</td><td>1</td><td>Each</td><td>19.00 USD</td><td>19</td><td>Pending approval</td><td>Not reserved</td></tr></table> **Requester** Michael Rath **Supplier** Action Pest Control, Inc. **Urgent** No **New Supplier** No **Requested Delivery Date** 08/29/2019 **Supplier Site** MAIN **Deliver-to Location Type** Internal **Supplier Contact** **Deliver-to Location** Support Services **Contact Phone** **Deliver-to Address** 1 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES **Supplier Item** **Destination Type** Expense **Note to Supplier** **Subinventory** **Note to Receiver** **Note to Buyer** **Distributions** <table><tr><th>Distribution</th><th>Charge Account</th><th>Budget Date</th><th>Percentage</th><th>Quantity</th><th>Amount (USD)</th><th>Funds Status</th></tr><tr><td>1</td><td>1010.114001.50.630007.0 0000.00000</td><td>8/22/19</td><td>100</td><td>1</td><td>19</td><td>Not reserved</td></tr></table> End of Report
2	If the requisition details meet the criteria for approval, click the button to: ==**Approve**.== The Oracle system will provide a notification of the approved status to the Requisitioner. [Approve] [Reject] [Request Info] Note: ==**Approve**== will allow the requisition to source. ==**Request Info**== sends back to the Requisitioner and restarts workflow approvals. ==**Reject**== stops the workflow and the requisition does not proceed. All options will provide a notification of the status to the Requisitioner.

Reject Requisition

Audience: Requesters, Approvers

Purpose: Although you cannot selectively approve or reject individual items, you can edit a requisition to add or delete items, modify requisition quantity, and then approve the requisition. If the approver needs to reject specific lines on the requisition, the approver should reject the entire requisition. The approver can include comments on the Worklist task to highlight the rejection reason. The preparer then must update the requisition and resubmit it for approval.

This job aid will guide you through steps to reject a requisition.

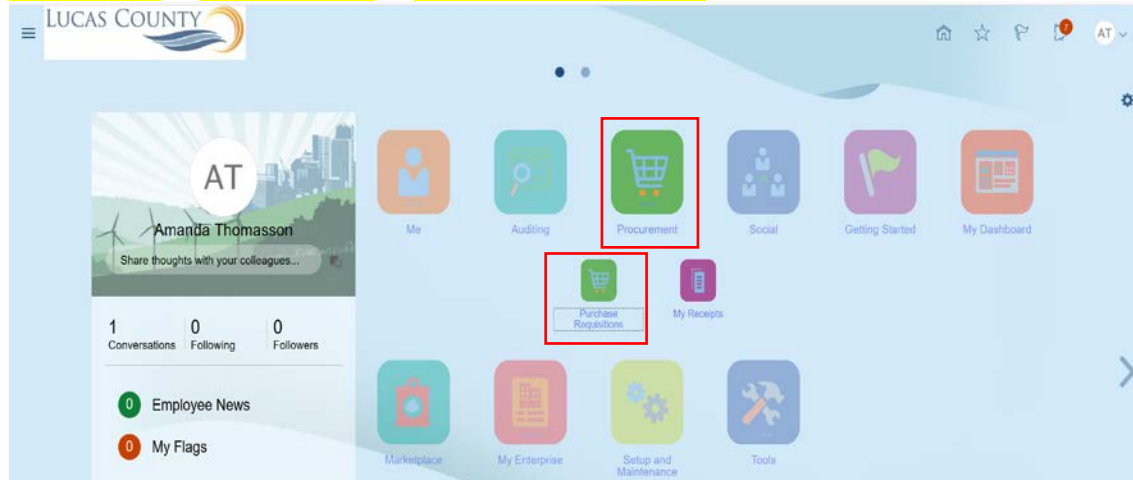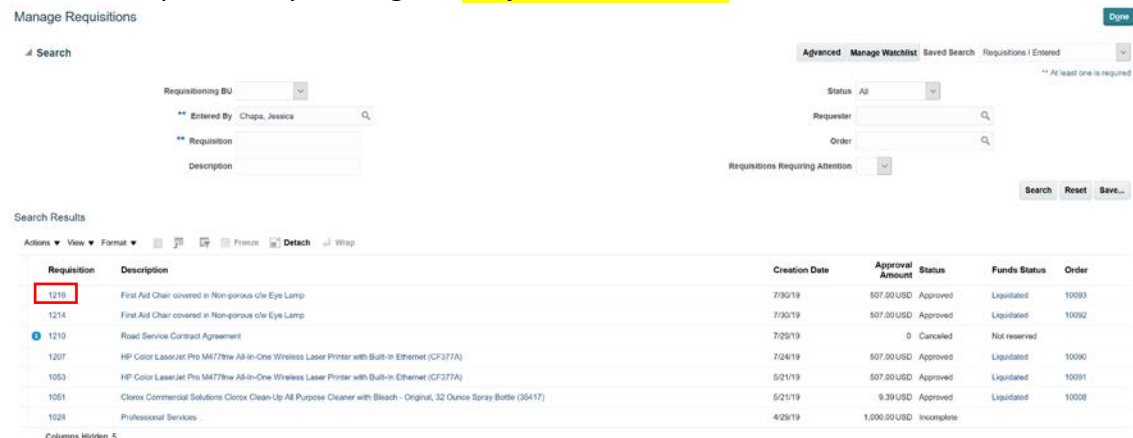| Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions**
2	Click the **Notifications** (Bell icon) at the top right of the page. The number indicates new notifications not yet viewed.
3	Activities requiring your response/action will display in a list. These activities are dependent on your role in the system. Select a pending Notification **Action Required: Approve Requisition**.

4	Review the details of the requisition. If any justifications were attached, those can be reviewed at this time.
5	Actions are listed in the Actions dropdown for this requisition. For this example, select no actions, but click the **Reject** button.

6	You will be prompted to enter rejection comments. You can also drag any files or click to add a file attachment, when required.
7	Click the **Submit** button to complete the rejection and send the requisition back through workflow to the Requisitioner.

View Requisition, Approval Status and Approval Notes

Audience: Requester

Purpose: For the requisitions you created, you can view requisition information from the Manage Requisitions page. This includes viewing a Requisition Approval Status and Approval Notes. This job aid will assist you with viewing this information for requisitions you created.

Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions**
2	Click the **Manage Requisitions** link.
3	Select a Requisition by clicking the **Requisition Number** link.
4	Click the **View Life Cycle** button.

5	Once reviewed, click the **Done** button.

6	Note the Requisition **Status**.

7	Click the **Done** button to return to Manage Requisitions page.

8	Highlight a requisition to be viewed and click **Actions** and select **View Document History**.
9	Review **'Actions Performed'** and any **'Additional Information'** notes from Approver will be displayed here.
10	Once review is complete, click the **Done** button to return to Requisition Details page.
11	Click the **Done** button to return to Manage Requisitions page.

Receiving Requisitions

Audience: Requesters, Receivers

Purpose: This job aid will assist you with processing goods and services receipts as a Requester.

Step	Action
1	Log into Oracle. **Home Page -> Procurement > My Receipts**
2	The **Receive Items** page displays. Several fields in the **Search** section are indicated by double asterisks. Of these, at least one field is required to be filled. Your requester name is entered by default. You can search on multiple criteria. For this example, we will search by Items Due in the last 60 days. Click the **Items Due** list.
3	Click to select **Last 60 days** from the list.
4	Click the **Requisitioning BU** field and select the Business Unit. Click the **Search** button.

5	From the Search Results, select the row of a requisition to receive against.
6	Click the **Receive** button.
7	The Create Receipts page displays for the requisition selected. Click the **Show Receipt Quantity** button to show the quantity remaining to receive.
8	Compare the displayed quantity to what was received on hand. If different from what displays in the Quantity field, enter the quantity received. Click the **Submit** button.
9	Click the **OK** button to acknowledge the receipt.
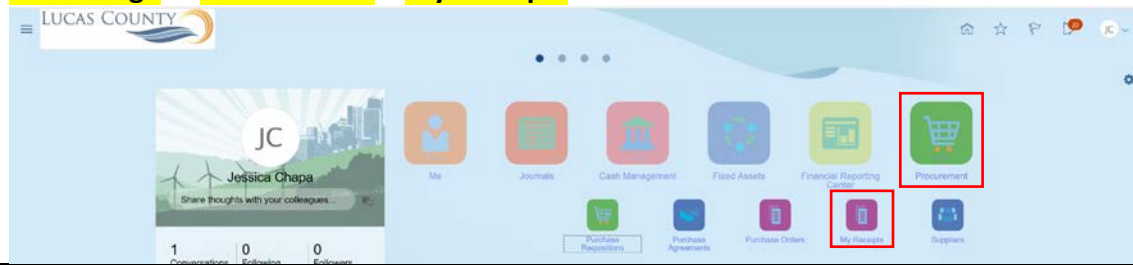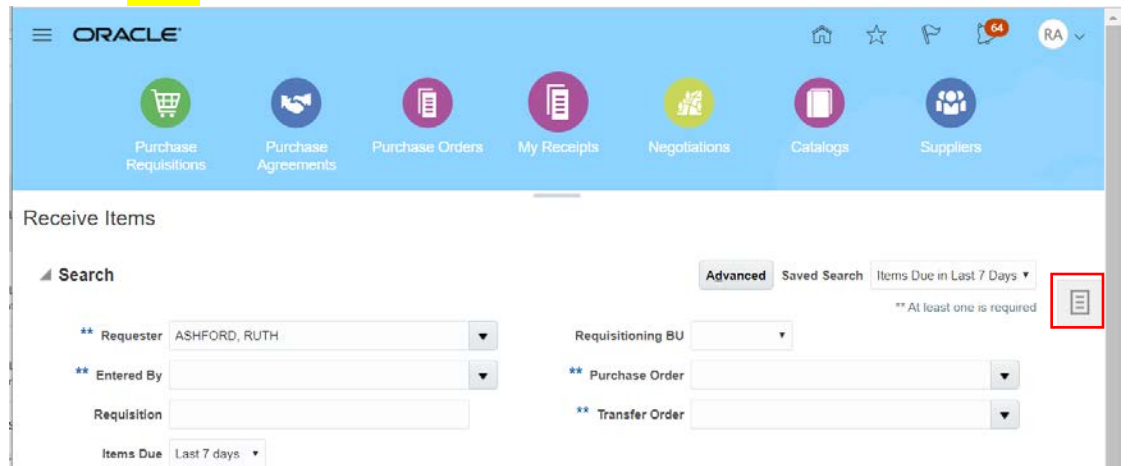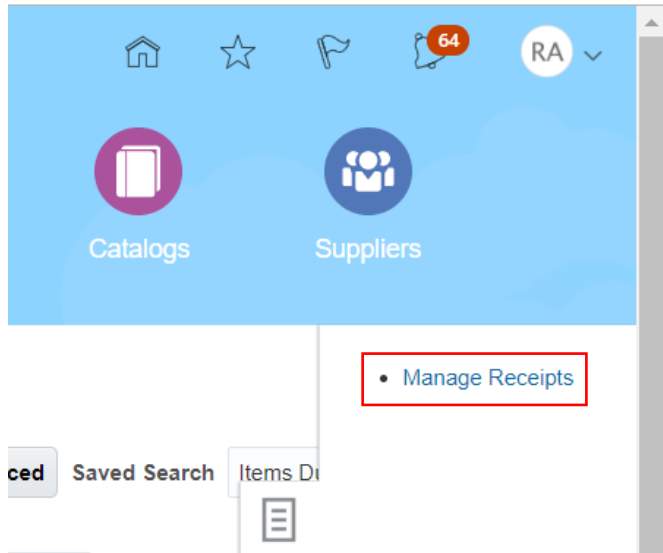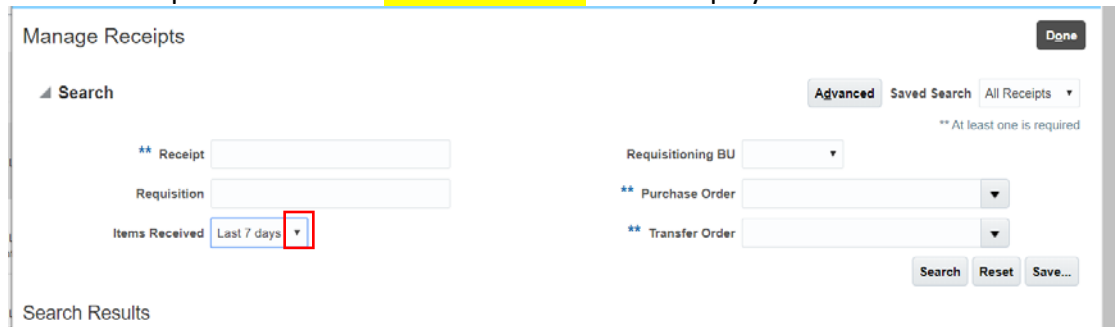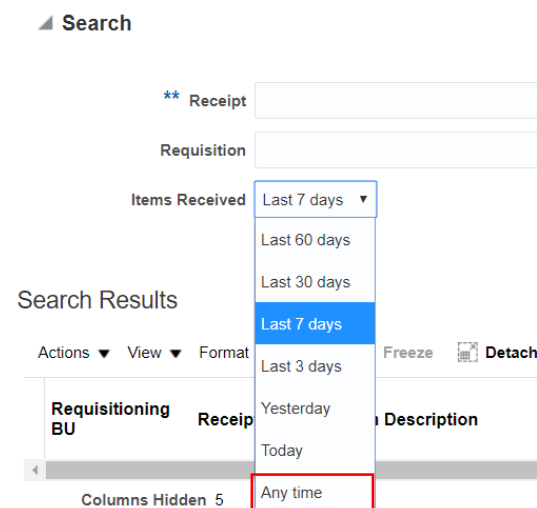
Perform Receiving Corrections

Audience: Requesters, Receivers

Purpose: A Receiving Agent can make corrections during the receiving process.

Step	Action
1	Log into Oracle **Home Page** -> **Procurement** > **My Receipts**
2	Click the **My Receipts** button.
3	Click the **Tasks** icon.
4	Click the **Manage Receipts** link.
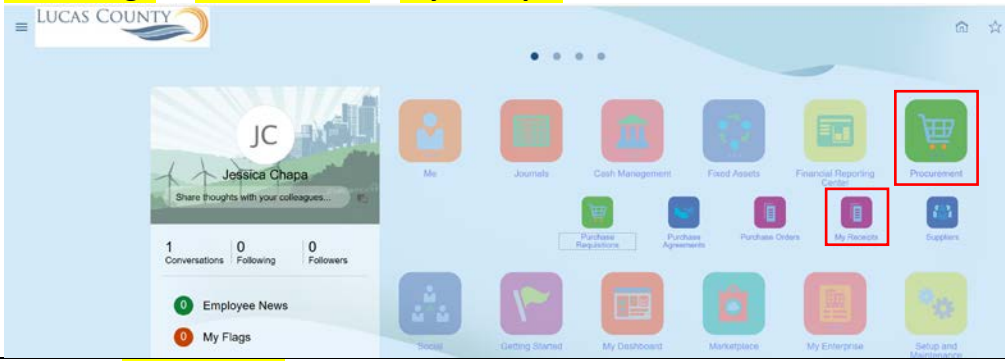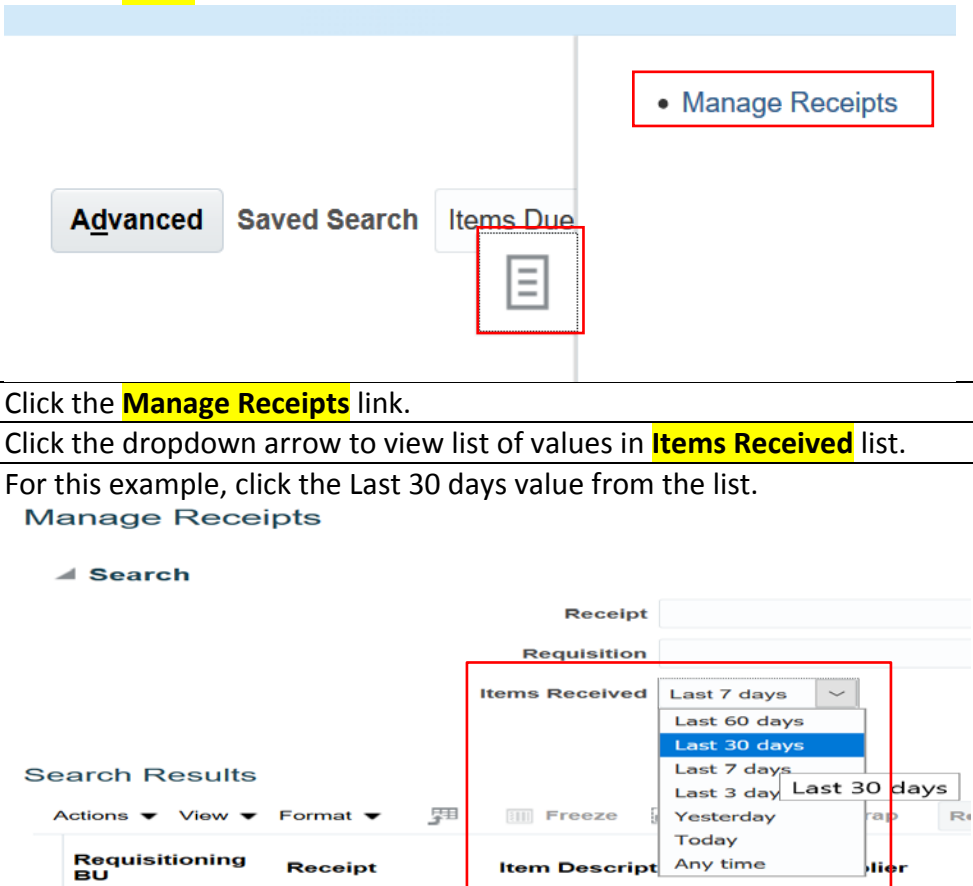
5	Click the dropdown arrow in **Items Received** list to display the values:.
6	Click the **Anytime** option from this list.
7	Click the **Requesting BU** field and select the Business Unit.
	In addition, at least one of the following must be entered to produce results from this page:

	Receipt, Purchase Order, or **Transfer Order**.
8	Click the <mark>Search</mark> button and highlight the receipt for correction. Manage Receipts ▷ Search Search Results Actions ▾ View ▾ Format ▾ ⊞ ▥ Freeze ▦ Detach ◡ Wrap Return Correct | Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	UOM Name	Currency	Receipt Date	Purchase Order	Transfer Order	Shipment
Lucas County	2004	FA Equipment	Compass Rose Soluti...	1	Each		5/21/19 3:18...	10009		
Lucas County	2005	HBO Pack!	Compass Rose Soluti...	2	Each		5/21/19 6:19...	10011		
Lucas County	2006	Spanish Pack!	Compass Rose Soluti...	2	Each		5/21/19 11:0...	10012		
Lucas County	2009	Test	E Technologies, Inc.	5	Each		6/3/19 11:09...	10035			
9	Click the <mark>Correct</mark> button.
10	Click in the <mark>*Correct Quantity</mark> field and update the quantity. Correct Receipts View ▾ Format ▾ ⊞ ▥ Freeze ▦ Detach ◡ Wrap Remove Line 	Requisitioning BU	Receipt	Item Description	Supplier	Received Quantity	UOM Name	Currency	* Correct Quantity
Lucas County	2005	HBO Pack!	Compass Rose ...	2	Each		1	 Columns Hidden 1
11	Click the <mark>Submit</mark> button.
12	Click the <mark>OK</mark> button.
13	Click the <mark>Done</mark> button.

Create Returns to Receipts

Audience: Requesters, Receivers

Purpose: This job aid will assist you with creating returns from goods received.
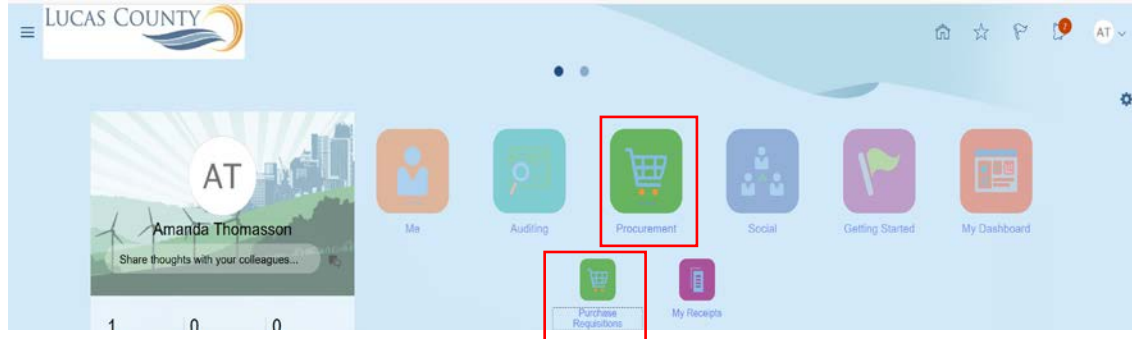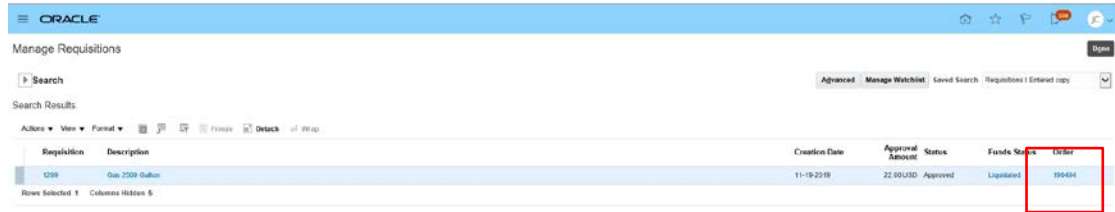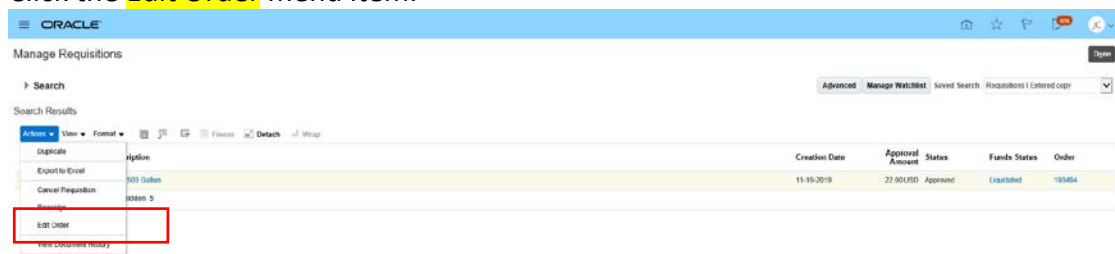
Step	Action
1	Log into Oracle **Home Page -> Procurement > My Receipts**
2	Click the **My Receipts** Icon.
3	Click the **Tasks** icon.
4	Click the **Manage Receipts** link.
5	Click the dropdown arrow to view list of values in **Items Received** list.
6	For this example, click the Last 30 days value from the list.

7	Click the **Search** button.
8	Select a row to be returned and click the **Return** button.
9	Click in the ***Return Quantity** field.
10	Enter the return quantity into the ***Return Quantity** field and select a **Reason**.
11	Click the **Submit** button.
12	Click the **OK** button.

Edit Order

Audience: Requesters

Purpose: This job aid will assist you with editing a Purchase Order which has been issued and approved.
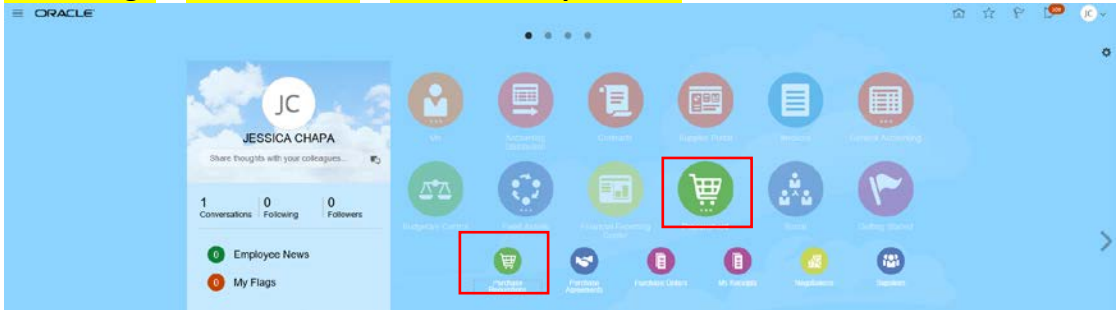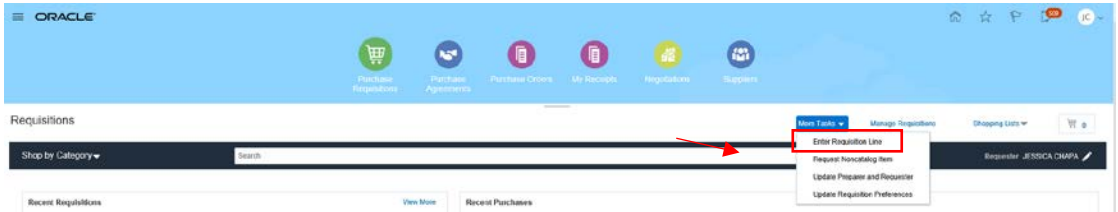
Step	Action
1	Log into Oracle. **Home Page** -> **Procurement** -> **Purchase Requisitions**
2	Click the **Manage Requisitions** link to view details of requisitions you created.
3	**Search** for Requisition which has been approved and a Purchase Order has been created and approved.
4	Highlight the **Requisition** to be changed.
5	Click the **Actions** drop-down list.
6	Click the **Edit Order** menu item.
7	A warning message will be displayed. Click the **Yes** button to continue.
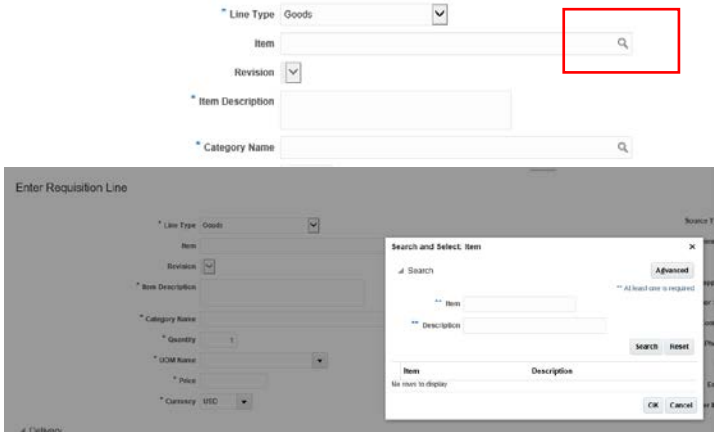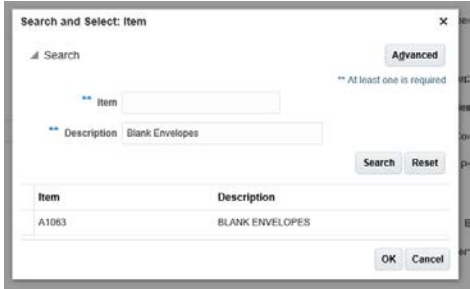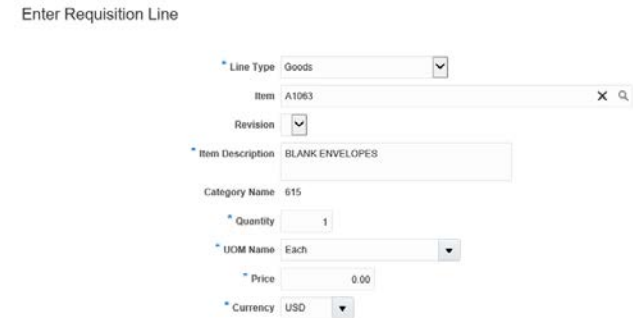
8	Enter **Description** of the Change
9	**Perform** necessary changes to the Order.
10	Enter **Change Reason**
11	Click the **Save** button.
12	Click the **Submit** button. The Order will be sent for approval.
13	Click the **OK** button.

Create Requisition Line Entry for Item Master Items
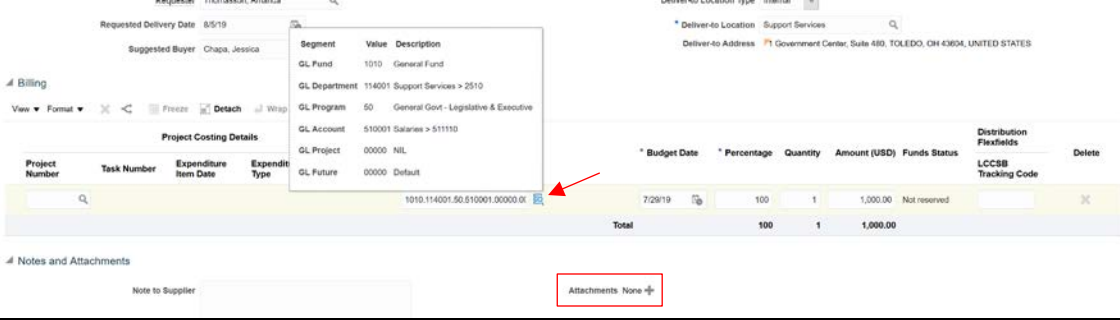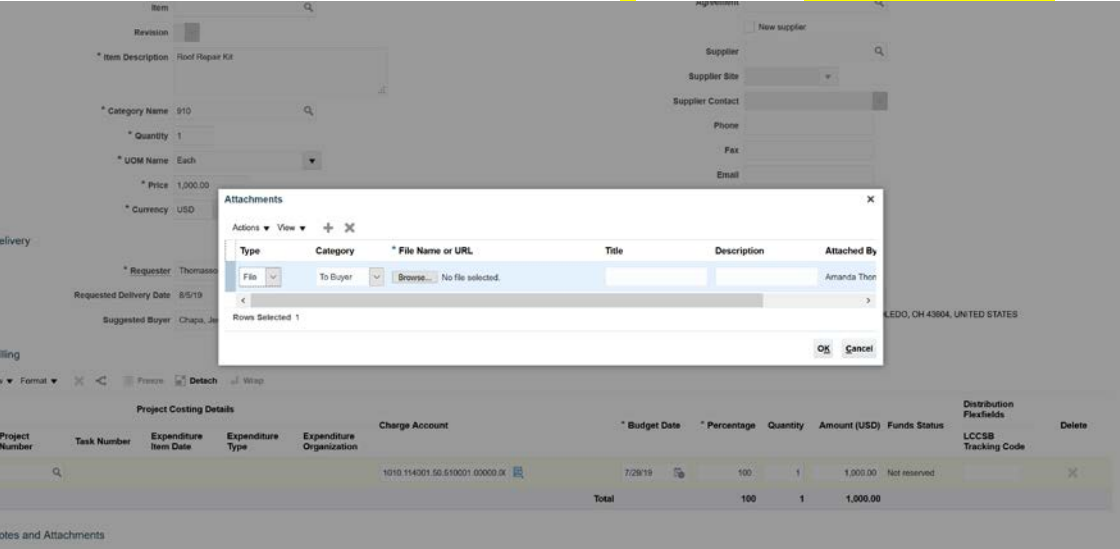
Audience: Requesters

Purpose: An order is a formal authorization to purchase goods or services. Your purchasing department creates a purchase order, which a supplier receives. A purchase order can be tracked until you receive the goods or services. A requisition is a request for the goods or services. If approved, a purchase order is created to fulfill the requisition. If details. The Requisitions page is the landing page for the Purchase Requisitions work area and is also informally referred to as the shopping home page. Requesters can use the self-service page to place purchase requests for goods or services. Item Master Items can be selected and will prefill certain information (Description, Category Code and Unit of Measure) to simplify requisition entry for common nly purchased goods /services. This job aid will assist you with creating a purchase requisition line entry for items contained in the Item Master.

Step	Action
1	Log into Oracle. **Home Page > Procurement > Purchase Requisitions**
2	Click the **More Tasks > Enter Requisition Line** link.
3	Click the **Line Type** list.
4	Select the **Goods** list item.
5	Select the Item **Search** Icon

Enter Requisition Line

6	Search for Items contained in the Item Master by Item Number or Description (All Items Numbers start with A)
7	**Select Item** and click **OK.**
8	The Item Master item details will populate the requisition line. **Update Description, Quantity and Price** as needed.
9	Click the **Charge Account** icon and either accept default or add new applicable charge account information.

10	In the Notes and Attachments section, click the **+** icon next to **Attachments None**.
11	In the Attachments window click the **Type** list.
12	Select the **File** list item.
13	Click the **Category** list.
14	Click to select the **To Buyer** list item.
15	Click the **Browse** button under ***File Name or URL** field.
16	Select a file for **Attachment**.
17	Click in the **Title** field.
18	Enter information into the **Title** field.
19	Click in the **Description** field and enter information into the **Description** field.
20	Click the **Add to Cart** button.

21	Click Shopping Cart icon and select **Review.**
22	Select Y/N option for ***State Contract - If yes, please insert Contract Number.**
23	Enter if 'Y' is selected enter a number in the **State Contract Number** field.
23	Select Y/N ***Sole Source** ("If yes please attach proof of Sole Source").
24	Select Y/N ***Resolution Attached**.
25	Select Y/N ***Will Services be performed on Lucas County property?**
26	Click the **Check Funds** button.
27	Click the **View Funds Check Results** button.
28	Click the **Done** button.
29	Click the **OK** button.
30	Click the **Manage Approvals** button.
31	Click the **Submit** button.
32	Click the **OK** button.