



# Self Service Procurement Training

## Oracle Cloud Applications Implementation Lucas County

### December 2019



# Oracle Cloud Self Service Procurement

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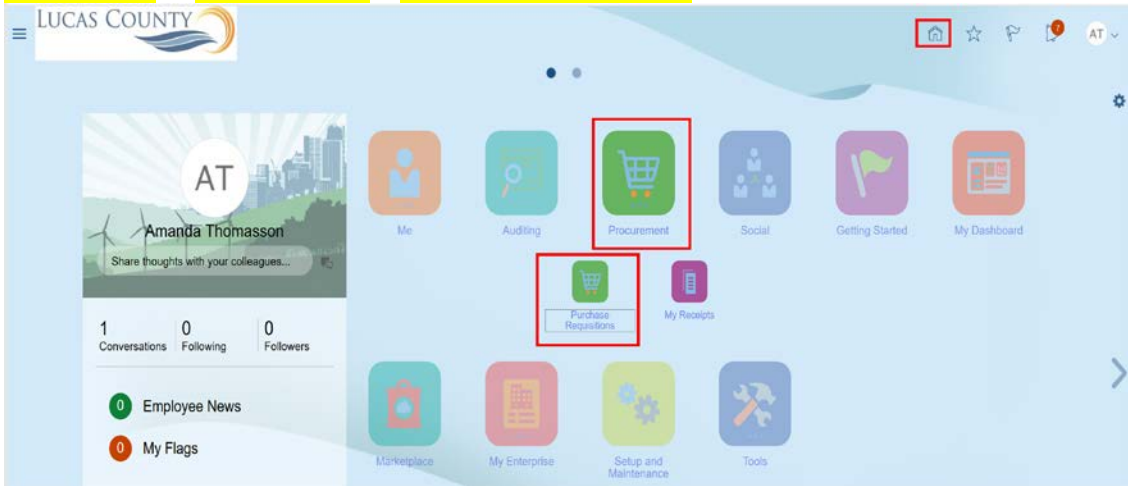
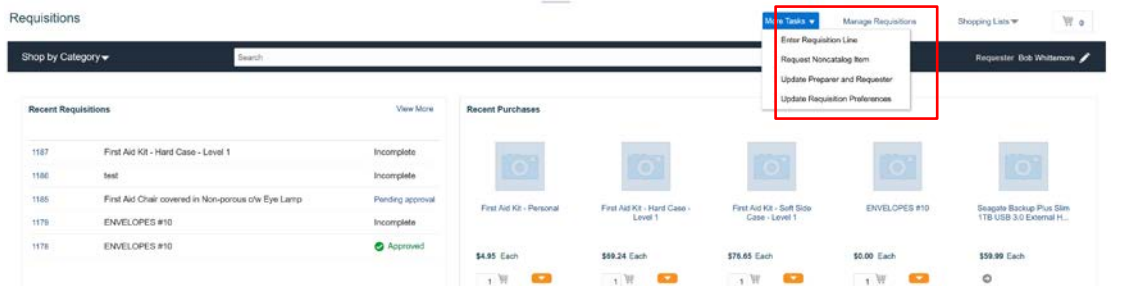
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\*These Job Aids only apply to following Lucas County Agencies: Mental Health & Recovery Services, Board of Developmental Disabilities, Lucas County Children Services, Toledo Lucas County Health Department, Lucas County Emergency Planning Commission, 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	<p>Log into Oracle.  <b>Home Page -&gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Task</b> button and select <b>Update Requisition Preferences</b>.</p> 
3	<p>Under the Favorite Charge Accounts click the <b>Add Row button</b>. The '+' icon represents adding a row.</p>

	<div><div>Edit Requisition Preferences</div><div>Requisitioning BU Lucas County</div><div><div>Shipping and Delivery</div><div><div>* Requester</div><div>Chapa, Jessica</div><div></div></div><div><div>* Deliver-to Location</div><div>Support Services</div><div></div></div><div><div>Destination Type</div><div>Expense</div><div></div></div></div><div><div>Billing</div><div>Projects</div><div><div>Project Number</div><div></div><div></div></div><div><div>Task Number</div><div></div></div><div><div>Expenditure Type</div><div></div></div><div><div>Expenditure Organization</div><div></div></div></div><div><div>Favorite Charge Accounts</div><div></div></div><div><div>Primary</div><div>* Nickname</div><div>* Charge Account</div><div>Delete</div></div></div>
4	<div>Click in the <div>*Nickname</div> 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.</div>
5	<div>Enter information into the <div>*Nickname</div> field.</div> <div><div>Favorite Charge Accounts</div><div><div><div>Primary</div><div>* Nickname</div></div><div><div><div></div></div><div>Computer Products</div></div></div></div>
6	<div>Click the <div>*Charge Account List of values</div> button. Select the default charge account values that will default into the Requisition.</div> <div><div>* Charge Account</div><div><div></div><div></div></div></div>

	<div><div>Charge Account</div><div><div>Hide Segments</div><div><div><div>GL Fund</div><div>1010</div><div>▼</div><div>General Fund</div></div><div><div>GL Department</div><div>114001</div><div>▼</div><div>Support Services &gt; 2510</div></div><div><div>GL Program</div><div>50</div><div>▼</div><div>General Govt - Legislative &amp; Executive</div></div><div><div>GL Account</div><div>121500</div><div>▼</div><div>Furniture Fixtures &amp; Eqpt &gt; 121500</div></div><div><div>GL Project</div><div>00000</div><div>▼</div><div>NIL</div></div><div><div>GL Future</div><div>00000</div><div>▼</div><div>Default</div></div></div><div><div>Search</div><div>Reset</div><div>OK</div><div>Cancel</div></div></div></div>
7	Click the <b>OK</b> button.
8	Click the <b>Add Row</b> button. The '+' icon represents adding a row. <div><div>Favorite Charge Accounts</div><div><div><div>Primary</div><div>* Nickname</div><div>* Charge Account</div><div>Delete</div></div><div><div><div><div>✓</div></div><div>Computer Products</div><div>1010.114001.50.121500.00000.00</div><div><div>+</div></div></div><div><div><div>✕</div></div></div></div></div></div>
9	Click in the <b>*Nickname</b> field.
10	Enter information into the <b>*Nickname</b> field. <div><div>Favorite Charge Accounts</div><div><div><div>Primary</div><div>* Nickname</div></div><div><div><div><div>✓</div></div><div>Computer Products</div></div><div><div><div>⊙</div></div><div>Furniture &amp; Fixtures</div></div></div></div></div>
11	Click the <b>*Charge Account List of values</b> button. The Requester can click on the drop-down list and search for value for each of the specific account segments. <div><div>Charge Account</div><div><div>Hide Segments</div><div><div><div>GL Fund</div><div>1010</div><div>▼</div><div>General Fund</div></div><div><div>GL Department</div><div>114001</div><div>▼</div><div>Support Services &gt; 2510</div></div><div><div>GL Program</div><div>50</div><div>▼</div><div>General Govt - Legislative &amp; Executive</div></div><div><div>GL Account</div><div>630007</div><div>▼</div><div>Office Supplies &gt; 514121</div></div><div><div>GL Project</div><div>00000</div><div>▼</div><div>NIL</div></div><div><div>GL Future</div><div>00000</div><div>▼</div><div>Default</div></div></div><div><div>Search</div><div>Reset</div><div>OK</div><div>Cancel</div></div></div></div>
12	Click the <b>OK</b> button.
13	Click the <b>Nickname</b> field to select the row that will be the primary Charge Account.
14	Click the <b>Actions</b> menu.
15	Click on <b>Set Primary</b> .

Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	Computer Products	1010.114001.50.121500.00000.00	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Furniture & Fixtures	1010.114001.50.630007.00000.00	<input type="checkbox"/>

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

Enter Requisition Line

Add to Cart
Done

\* Line Type: Goods
Item:
Revision:
\* Item Description:
\* Category Name:
\* Quantity: 1
\* UOM Name:
\* Price:
\* Currency: USD

Source Type: Supplier
Agreement:
New supplier:
Supplier:
Supplier Site:
Supplier Contact:
Phone:
Fax:
Email:
Supplier Item:

Delivery

\* Requester: Chapa, Jessica
Requested Delivery Date: 8/7/19
Suggested Buyer:

Deliver-to Location Type: Internal
\* Deliver-to Location: Support Services
Deliver-to Address: Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES

Billing

View
Format
Print
Detach
Wrap

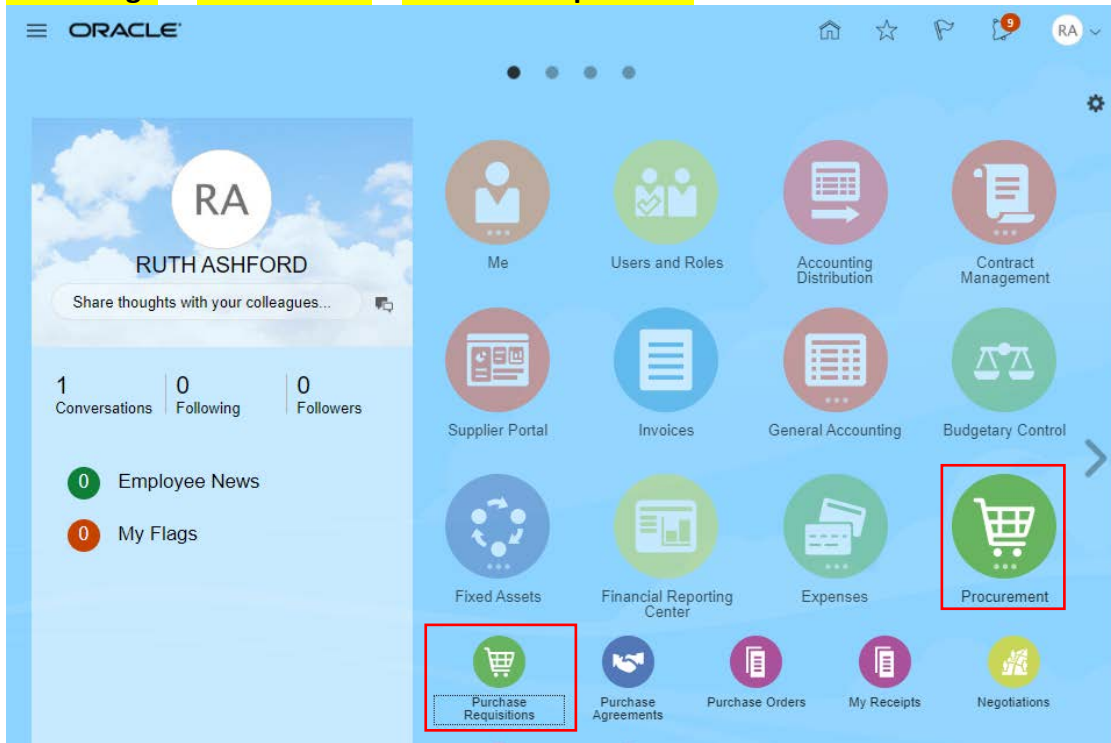
Project Costing Details

Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields	LCCSB Tracking Code	Delete
					1010.114001.50.121500.00000.00	7/31/19	100	1		Not reserved			
Total									100	1			


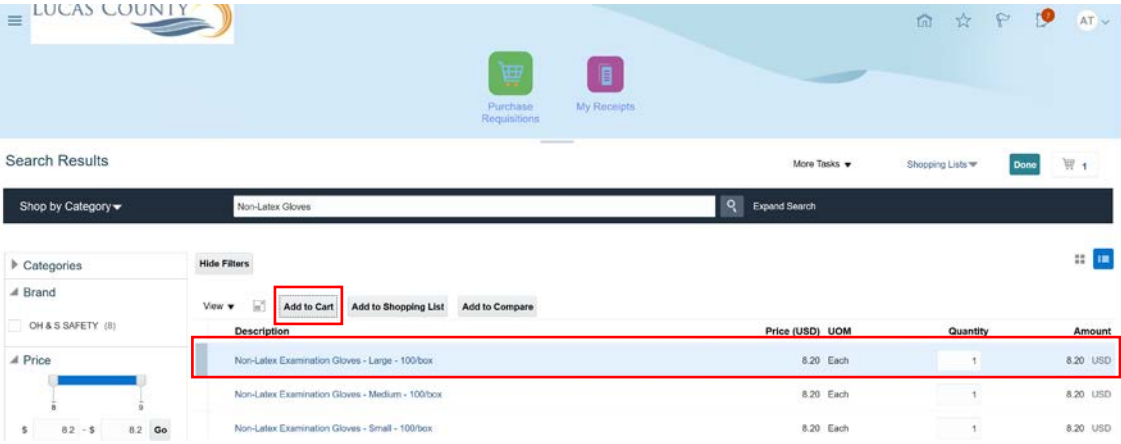

## Create Requisition from a Catalog (Internal and Punchout)

**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
	<b>Create a purchase requisition from an Internal Catalog.</b>
1	<p>Log into Oracle  <b>Home Page -&gt; Procurement &gt; Purchase Requisitions</b></p>  <p>The screenshot shows the Oracle Home Page for user RUTH ASHFORD. The page features a grid of application icons. The 'Procurement' icon, which includes a shopping cart, is highlighted with a red rectangular box. Below the main grid, there is a row of smaller icons, including 'Purchase Requisitions', which is also highlighted with a red rectangular box. Other visible icons include 'Me', 'Users and Roles', 'Accounting Distribution', 'Contract Management', 'Supplier Portal', 'Invoices', 'General Accounting', 'Budgetary Control', 'Fixed Assets', 'Financial Reporting Center', 'Expenses', 'Purchase Agreements', 'Purchase Orders', 'My Receipts', and 'Negotiations'.</p>
2	In the Requisitions window, click in the <b>Search</b> field, and enter an item to search.



	
3	Click the <b>Search</b> button.
4	<p>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 <b>Add to Cart</b> button.</p> 
5	<p>Click the <b>Shopping Cart</b> and select <b>Review</b> to return to the <b>Edit Requisition</b> page.</p> 
6	<p>The <b>Edit Requisition</b> page is now displayed.</p> <p>Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b></p>



	<p>Edit Requisition: 1193</p> <p>Requisitioning BU: Lucas County</p> <p>* Description: Non-Latex Examination Gloves - Large - 100/box</p> <p>* State Contract - If yes, please insert Contract Number: Yes</p> <p>State Contract Number: [Field]</p> <p>* Sole Source - If yes please attach proof of Sole Source: [Field]</p> <p>* Resolution Attached: [Field]</p> <p>* Will Services be performed on Lucas County property?: [Field]</p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>* Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Non-Latex Examination Gloves - Large - 100/box</td> <td>345</td> <td>1</td> <td>Each</td> <td>8.20 USD</td> <td>8.20</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6">Total</td> <td>8.20</td> <td></td> <td></td> </tr> </tbody> </table>	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	X	Total						8.20		
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	X																				
Total						8.20																						
7	<p>Enter if 'Y' is selected enter a number in the <b>State Contract Number</b> field.</p> <p>Edit Requisition: 1193</p> <p>Requisitioning BU: Lucas County</p> <p>* Description: Non-Latex Examination Gloves - Large - 100/box</p> <p>* State Contract - If yes, please insert Contract Number: Yes</p> <p>State Contract Number: A-12345678900</p> <p>* Sole Source - If yes please attach proof of Sole Source: [Field]</p> <p>* Resolution Attached: [Field]</p> <p>* Will Services be performed on Lucas County property?: [Field]</p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>* Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Non-Latex Examination Gloves - Large - 100/box</td> <td>345</td> <td>1</td> <td>Each</td> <td>8.20 USD</td> <td>8.20</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6">Total</td> <td>8.20</td> <td></td> <td></td> </tr> </tbody> </table> <p>Rows Selected: 1 Columns Hidden: 8</p> <p>Line 1: Details</p> <p>Delivery</p>	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	X	Total						8.20		
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Total						8.20																						
8	<p>Select Y/N <b>*Sole Source</b> ("If yes please attach proof of Sole Source"). In this example select <b>'N'</b>.</p> <p>Edit Requisition: 1193</p> <p>Requisitioning BU: Lucas County</p> <p>* Description: Non-Latex Examination Gloves - Large - 100/box</p> <p>* State Contract - If yes, please insert Contract Number: Yes</p> <p>State Contract Number: A-12345678</p> <p>* Sole Source - If yes please attach proof of Sole Source: No</p> <p>* Resolution Attached: [Field]</p> <p>* Will Services be performed on Lucas County property?: [Field]</p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>* Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Non-Latex Examination Gloves - Large - 100/box</td> <td>345</td> <td>1</td> <td>Each</td> <td>8.20 USD</td> <td>8.20</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6">Total</td> <td>8.20</td> <td></td> <td></td> </tr> </tbody> </table> <p>Rows Selected: 1 Columns Hidden: 8</p>	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	X	Total						8.20		
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1	Non-Latex Examination Gloves - Large - 100/box	345	1	Each	8.20 USD	8.20	Not reserved	X																				
Total						8.20																						
9	<p>Select Y/N <b>*Resolution Attached</b>. In this example select <b>'N'</b>.</p>																											

	<div><div>Edit Requisition: 1193</div><div><div>Shop</div><div>Check Funds</div><div>Manage Approvals</div><div>View PDF</div><div>Save</div><div>Submit</div></div><div><div>Requisitioning BU</div><div>Lucas County</div><div>Justification</div><div></div><div>Requisition Amount</div><div>8.20 USD</div><div>Approval Amount</div><div>8.20 USD</div><div>Funds Status</div><div>Not reserved</div><div>Attachments</div><div>None</div></div><div><div>* Description</div><div>Non-Latex Examination Gloves - Large - 100/box</div></div><div><div>* State Contract - If yes, please insert Contract Number</div><div>Yes</div><div>State Contract Number</div><div>A-12345678900</div></div><div><div>* Sole Source - If yes please attach proof of Sole Source</div><div>No</div><div>Resolution Attached</div><div>No</div></div><div><div>* Will Services be performed on Lucas County property?</div><div>No</div></div><div><div>Requisition Lines</div><div><div>Actions</div><div>View</div><div>Format</div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div></div><div><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Edit Requisition: 1193

Shop Check Funds Manage Approvals View PDF Save Submit

Requisitioning BU Lucas County

Justification

Requisition Amount 8.20 USD

\* Description Non-Latex Examination Gloves - Large - 100/box

Approval Amount 8.20 USD

\* State Contract - If yes, please insert Contract Number Yes

Funds Status Passed

State Contract Number A-12345678900

Attachments None

\* Sole Source - If yes please attach proof of Sole Source No

\* Resolution Attached No

\* Will Services be performed on Lucas County property? No

Requisition Lines

Actions View Format Freeze Detach Wrap

Confirmation  
The transaction passed the funds check process.  
View Funds Check Results OK

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	Passed	X
Total						8.20		

Rows Selected 1 Columns Hidden 5

Line 1: Details

Delivery

\* Requester Thompson, Amanda

Delivery-to Location Type Internal

13

You can choose to View the Funds Check Results, or simply click the **OK** button.

14

Click the **Save** button.

Shop

Check Funds

Manage Approvals

View PDF

Save

Submit

Requisition Amount 8.20 USD

Approval Amount 8.20 USD

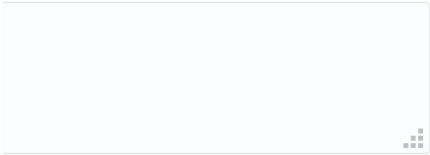
Funds Status Passed

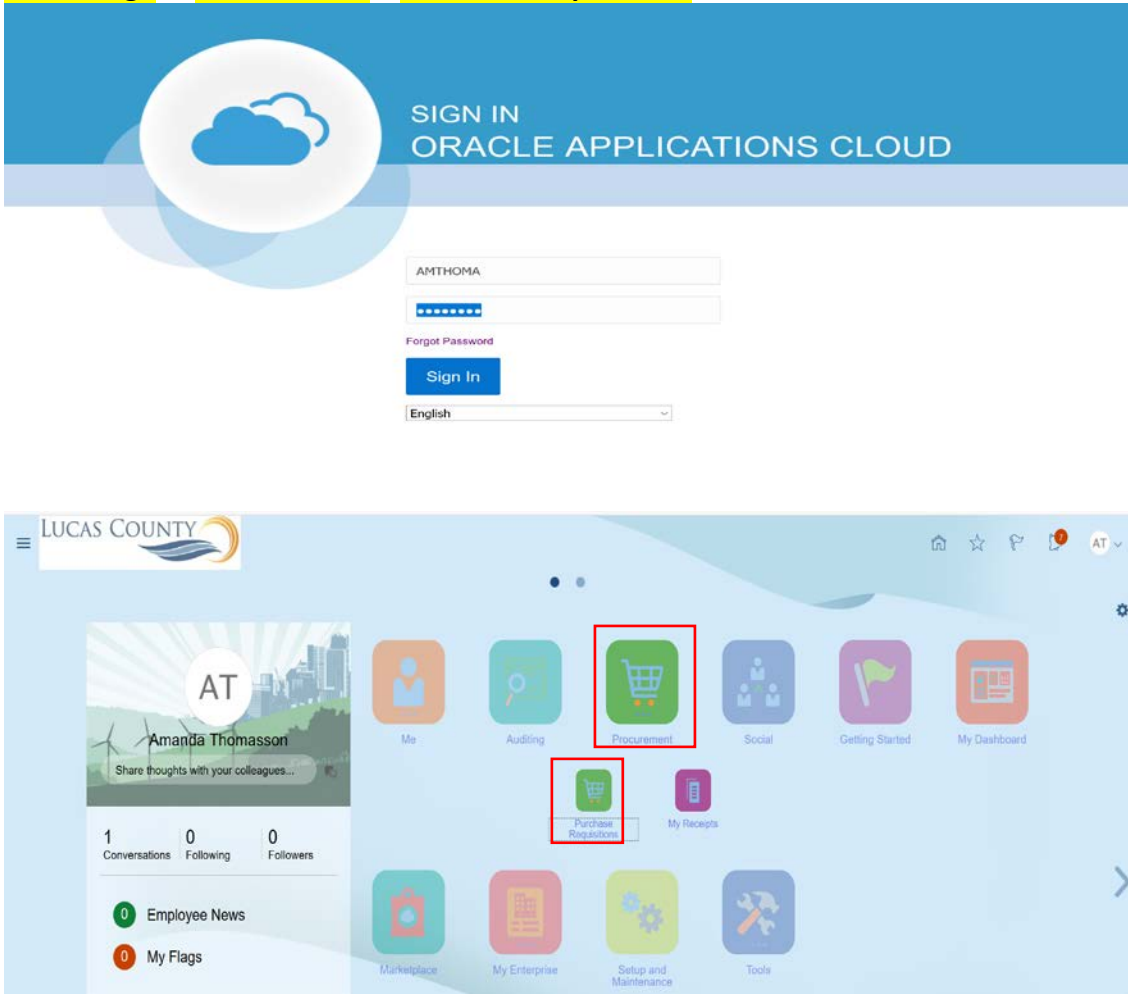
Attachments None

15

Click the **Manage Approvals** button.

	<div> <div> Shop Check Funds Manage Approvals View PDF Save Submit </div> <div> <div></div> <div> Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Passed Attachments None + </div> </div> <p>Review the approval path for the requisition.</p> <div> <div> LUCAS COUNTY </div> <div> Manage Approvals (Requisition 1193) Back Submit </div> <div> <div> <div> Section Stage or Participant </div> <div> 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 </div> </div> <div> <div> Header Preapproval... Amanda Thomasson Amanda Thomasson Ruth Ashford Header Stage Applications Devel... </div> </div> </div> </div> </div>
16	Click the <b>Back</b> button.
17	Click the <b>Submit</b> button.

	<div data-bbox="324 331 1409 405"> <span>Shop</span> <span>Check Funds</span> <span>Manage Approvals</span> <span>View PDF</span> <span>Save ▼</span> <span>Submit</span> </div> <div data-bbox="311 464 737 617">  </div> <div data-bbox="911 476 1333 516"> <b>Requisition Amount</b> 8.20 USD         </div> <div data-bbox="938 537 1333 577"> <b>Approval Amount</b> 8.20 USD         </div> <div data-bbox="992 617 1297 653"> <b>Funds Status</b> Passed         </div> <div data-bbox="998 693 1297 735"> <b>Attachments</b> None +         </div>
18	Click the <b>OK</b> button.

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

Requisitions

Shop by Category ▼ Search

Requester: Amanda Thomason

Recent Requisitions

Item ID	Description	Status
1150	Cement Mixer Operator	Approved
1150	Industrial Cement Mixing Unit	Approved
1154	Window Washing Service	Approved
1153	Ford F-250 Heavy Duty Pickup Truck	Approved
1152	Road Maintenance Repair - Asphalt fill for potholes	Approved

Recent Purchases

No data to display.

Top Categories

- Computer Supplies
- Maintenance Supplies
- Office Supplies

Staples

3 Under Related Suppliers select **Staples** link.

Search Results

Shop by Category ▼ Search

Related Suppliers

- Staples

Request Noncatalog Item

This will connect you to the supplier site for ordering.

SHOP

Account Number: 1844267DET

Messages Help My Account

Staples

LUCAS COUNTY

Review Cart (0)

SEARCH

BROWSE CATEGORIES QUICK ORDER YOUR LISTS YOUR DASHBOARD

Spark new ideas

Refresh your mindset with an organized and inspiring space.

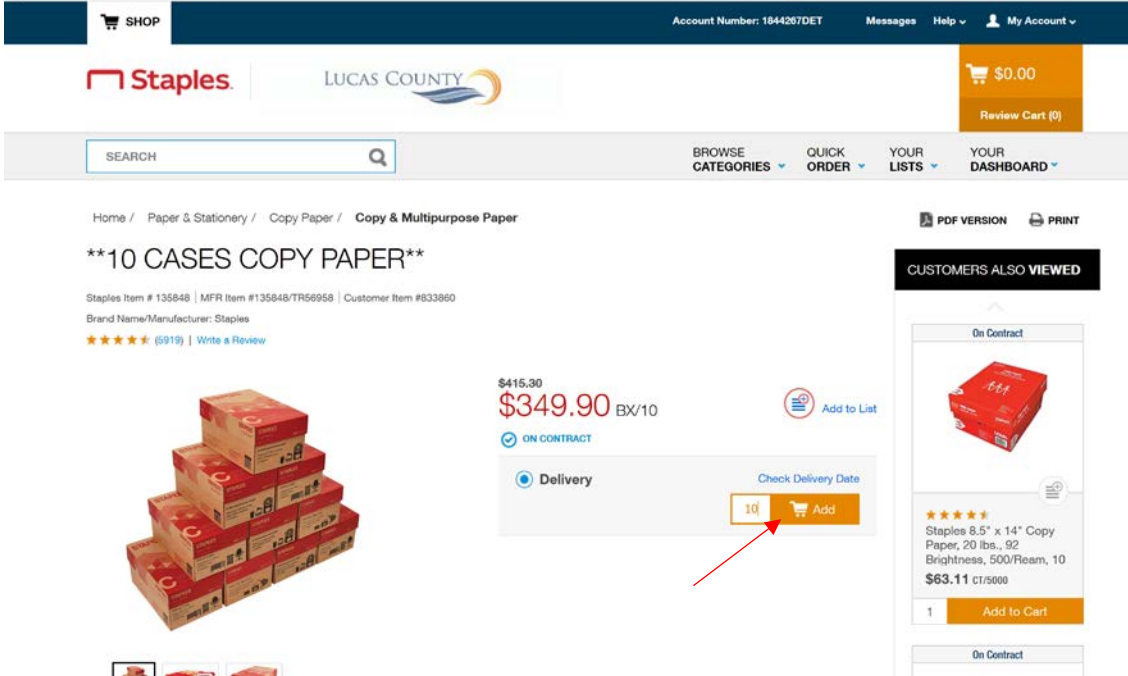
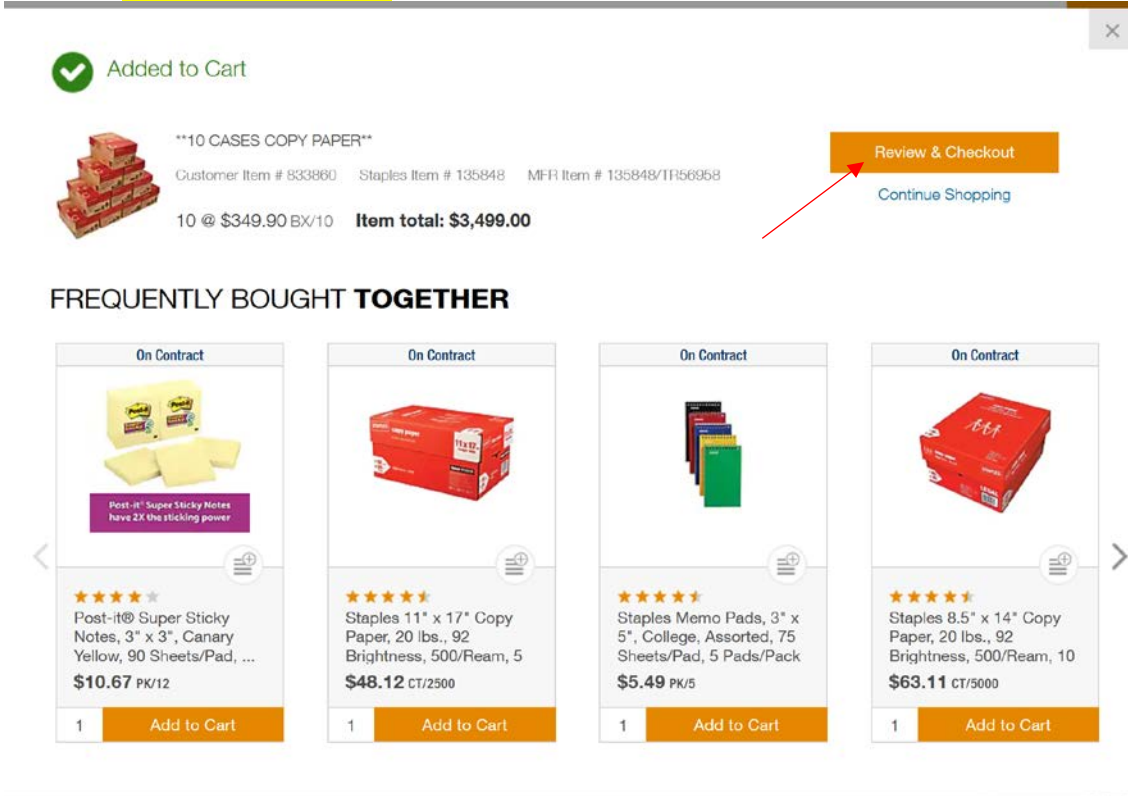
Shop now

RECOMMENDED FOR YOU

On Contract	On Contract	On Contract	On Contract	On Contract
<p>★★★★★ "10 CASES COPY PAPER"</p>	<p>★★★★★ Sharpie Permanent Markers, Fine Point, Black, 12/Pack (30001)</p>	<p>★★★★★ Staples Notepads, 8.5" x 11.75", Wide Ruled, White, 50 Sheets/Pad, 12 Pad</p>	<p>★★★★★ Staples Invisible Tape, 3/4" x 1.296", 12/Pack (52980P12)</p>	<p>★★★★★ Kleenex Boutique Standard Facial Tissues, 2-Ply, 95 Sheets/Box, 6/Pack</p>

Live Chat



4	Search for Item by name or number.
5	Update the <b>Quantity and Add to Cart</b> .
	 <p>The screenshot shows the Staples website interface. At the top, there's a navigation bar with 'SHOP', 'Account Number: 1844267DET', 'Messages', 'Help', and 'My Account'. Below this is the Staples logo and the Lucas County logo. A search bar is present with the text 'SEARCH'. To the right of the search bar are links for 'BROWSE CATEGORIES', 'QUICK ORDER', 'YOUR LISTS', and 'YOUR DASHBOARD'. The main content area displays the product '10 CASES COPY PAPER' with a price of \$349.90 BX/10. A red arrow points to the 'Add' button next to the quantity '10'.</p>
6	Click the <b>Review &amp; Check Out</b> button.
	 <p>The screenshot shows the 'Added to Cart' confirmation page. It features a green checkmark and the text 'Added to Cart'. Below this, the product '10 CASES COPY PAPER' is shown with its price and total. A red arrow points to the 'Review &amp; Checkout' button. The page also includes a section for 'FREQUENTLY BOUGHT TOGETHER' with four product recommendations.</p>
7	Click the <b>Submit Order</b> button. This will return you back to the requisition.



Edit Requisition: 1193

Shop Check Funds Manage Approvals View PDF Save Submit

Requisitioning BU Lucas County

\* Description Staples \*\*10 CASES COPY PAPER\*\*

Justification

Requisition Amount 3,499.00 USD

Approval Amount Calculate Amount with Tax

Funds Status Not reserved

Attachments None

\* State Contract - If yes, please Insert Contract Number Yes

State Contract Number A-12345678900

\* Sole Source - If yes please attach proof of Sole Source No

\* Resolution Attached No

\* Will Services be performed on Lucas County property? No

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete
2	**10 CASES COPY PAPER**	640	10	Each	349.90 USD	3,499.00	Not reserved	X
Total						3,499.00		

Rows Selected 1 Columns Hidden 8

Line 2: Details

Delivery

10 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 Staples \*\*10 CASES COPY PAPER\*\*

Justification

Requisition Amount 3,499.00 USD

Approval Amount Calculate Amount with Tax

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Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete
2	**10 CASES COPY PAPER**	640	10	Each	349.90 USD	3,499.00	Not reserved	X
Total						3,499.00		

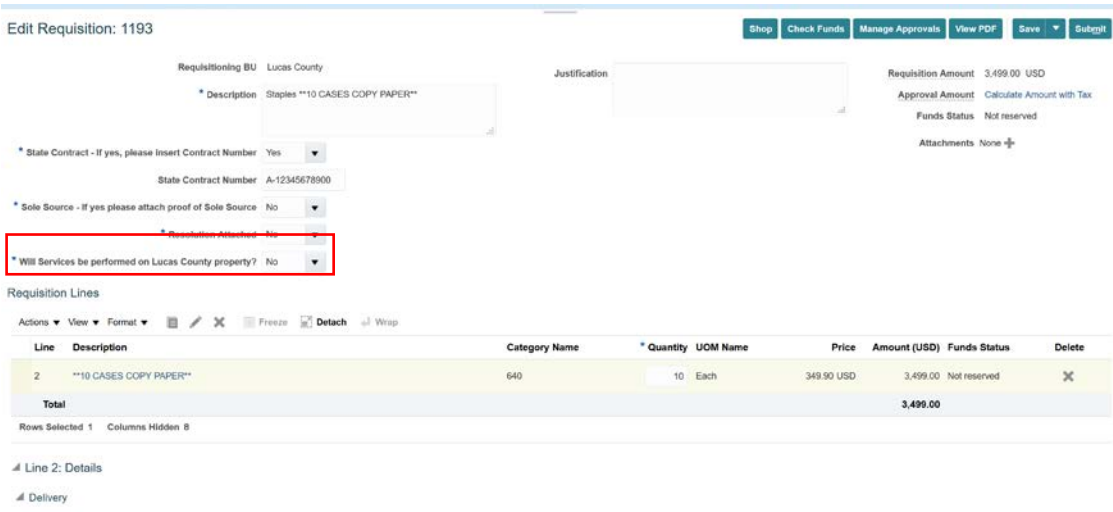
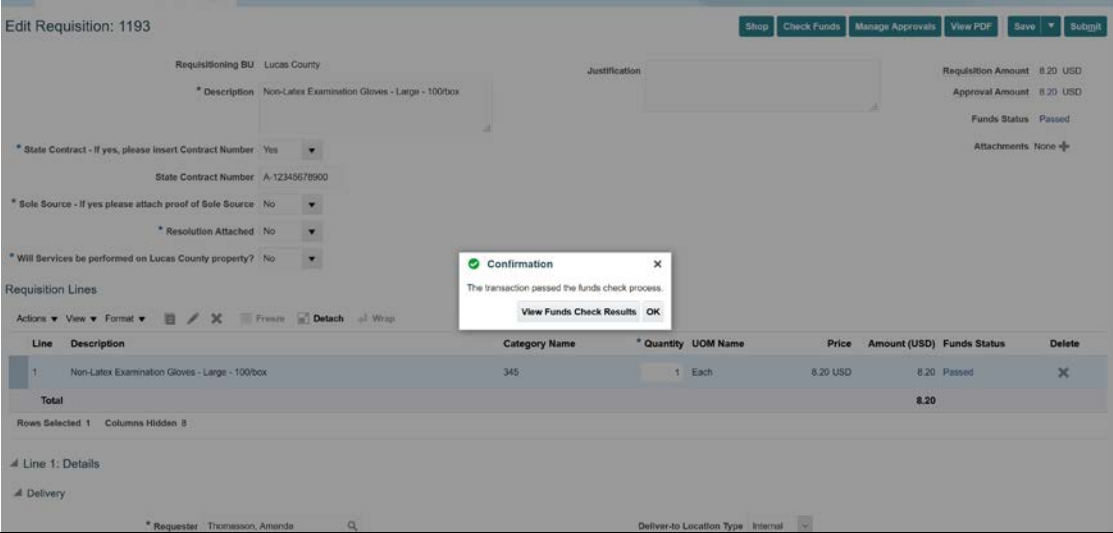
Rows Selected 1 Columns Hidden 8

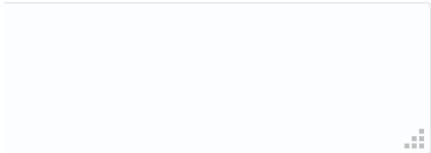
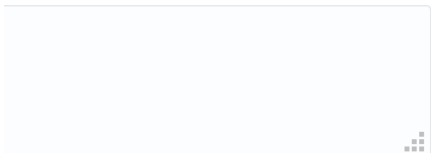
Line 2: Details

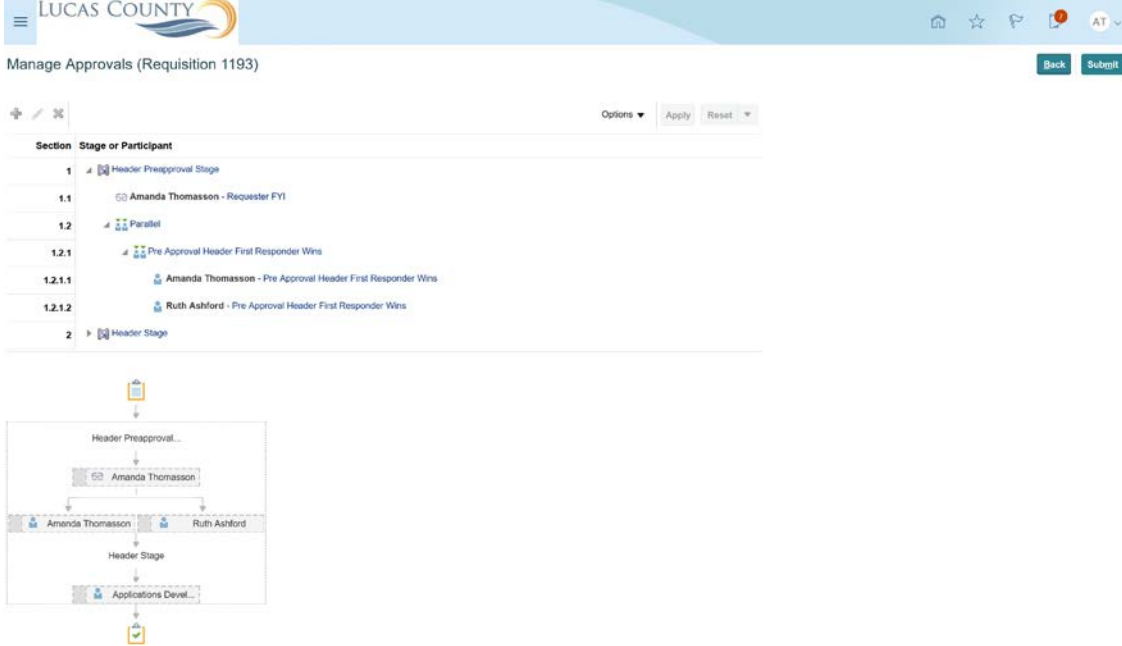
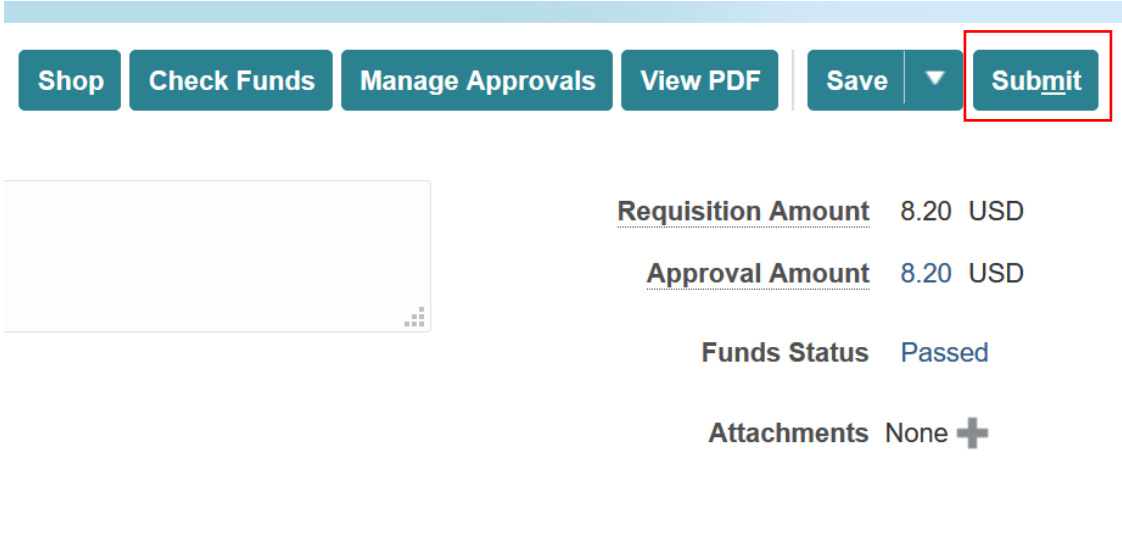
Delivery

11 Select Y/N **\*Sole Source** ("If yes please attach proof of Sole Source"). In this example select 'N'

	<p>Edit Requisition: 1193</p> <p>Requisitioning BU: Lucas County</p> <p>* Description: Staples **10 CASES COPY PAPER**</p> <p>Justification:</p> <p>Requisition Amount: 3,499.00 USD</p> <p>Approval Amount: Calculate Amount with Tax</p> <p>Funds Status: Not reserved</p> <p>Attachments: None</p> <p>* State Contract - If yes, please Insert Contract Number: Yes</p> <p>State Contract Number: A-12345678900</p> <p>* Sole Source - If yes please attach proof of Sole Source: No</p> <p>* Resolution Attached: No</p> <p>* Will Services be performed on Lucas County property?: No</p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>* Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>2</td> <td>**10 CASES COPY PAPER**</td> <td>640</td> <td>10</td> <td>Each</td> <td>349.90 USD</td> <td>3,499.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6"><b>Total</b></td> <td><b>3,499.00</b></td> <td></td> <td></td> </tr> </tbody> </table> <p>Rows Selected: 1 Columns Hidden: 8</p> <p>Line 2: Details</p> <p>Delivery</p>	Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete	2	**10 CASES COPY PAPER**	640	10	Each	349.90 USD	3,499.00	Not reserved	X	<b>Total</b>						<b>3,499.00</b>		
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13	<p>Select Y/N <b>*Will Services be performed on Lucas County property?</b> In this example select <b>'N'</b>.</p>																											

	
14	<p>Click the <b>Check Funds</b> button.</p> 
15	<p>Click the <b>OK</b> button.</p>
16	<p>Click the <b>Save</b> button.</p>

	<div data-bbox="310 289 1430 405"> <a href="#">Shop</a> <a href="#">Check Funds</a> <a href="#">Manage Approvals</a> <a href="#">View PDF</a> <div data-bbox="1101 321 1274 405" style="border: 2px solid red; padding: 2px;"> <a href="#">Save</a> ▼         </div> <a href="#">Submit</a> </div> <div data-bbox="310 464 737 615">  </div> <div data-bbox="922 478 1328 737"> <p><u>Requisition Amount</u> 8.20 USD</p> <p><u>Approval Amount</u> 8.20 USD</p> <p><b>Funds Status</b> Passed</p> <p><b>Attachments</b> None +</p> </div>
17	<p>Click the <b>Manage Approvals</b> button.</p> <div data-bbox="310 888 1430 1003"> <a href="#">Shop</a> <a href="#">Check Funds</a> <div data-bbox="639 919 922 1003" style="border: 2px solid red; padding: 2px;"> <a href="#">Manage Approvals</a> </div> <a href="#">View PDF</a> <a href="#">Save</a> ▼         <a href="#">Submit</a> </div> <div data-bbox="310 1062 737 1213">  </div> <div data-bbox="922 1077 1328 1335"> <p><u>Requisition Amount</u> 8.20 USD</p> <p><u>Approval Amount</u> 8.20 USD</p> <p><b>Funds Status</b> Passed</p> <p><b>Attachments</b> None +</p> </div> <p>Review approval path for the requisition.</p>

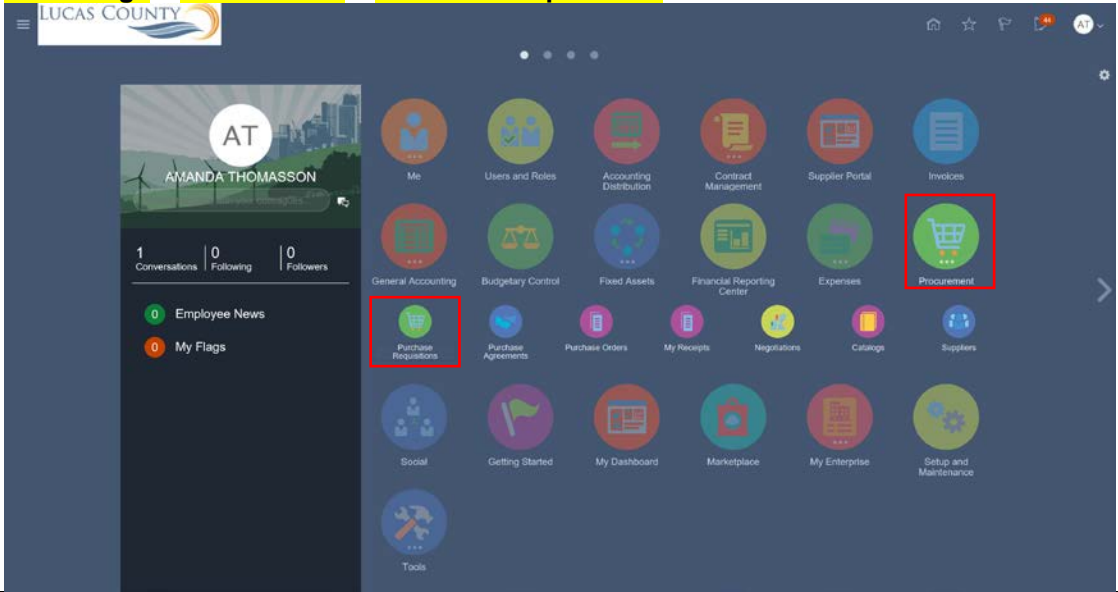
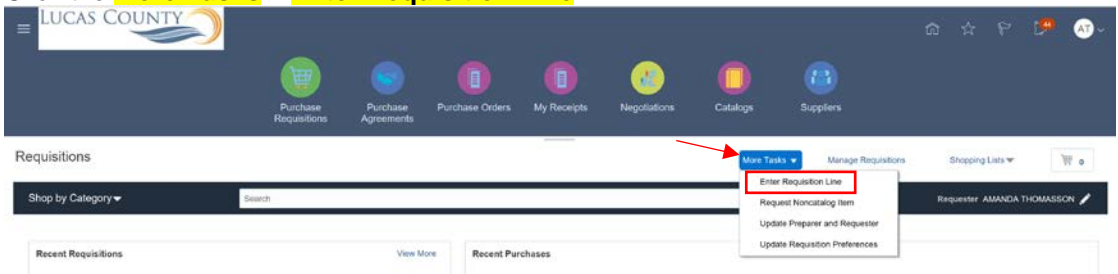
	
18	Click the <b>Back</b> button.
19	<p>Click the <b>Submit</b> button.</p> 
20	Click the <b>OK</b> button.

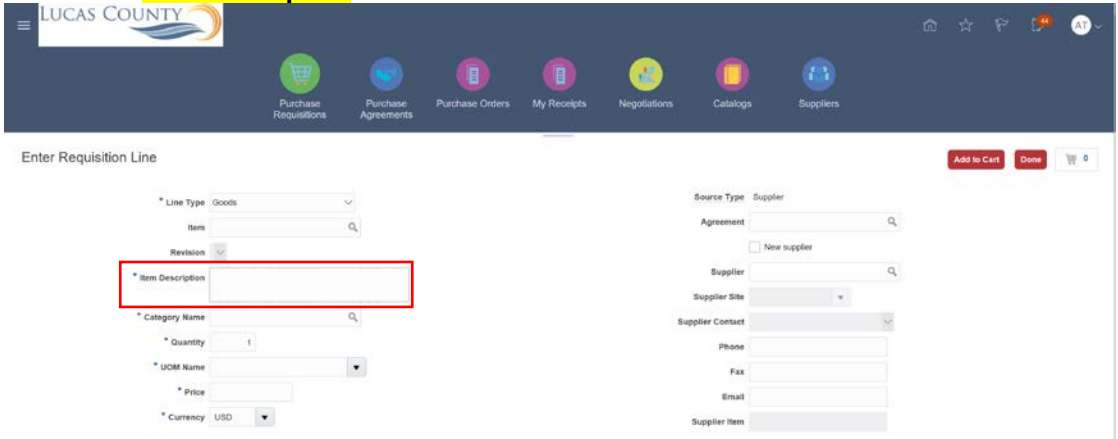
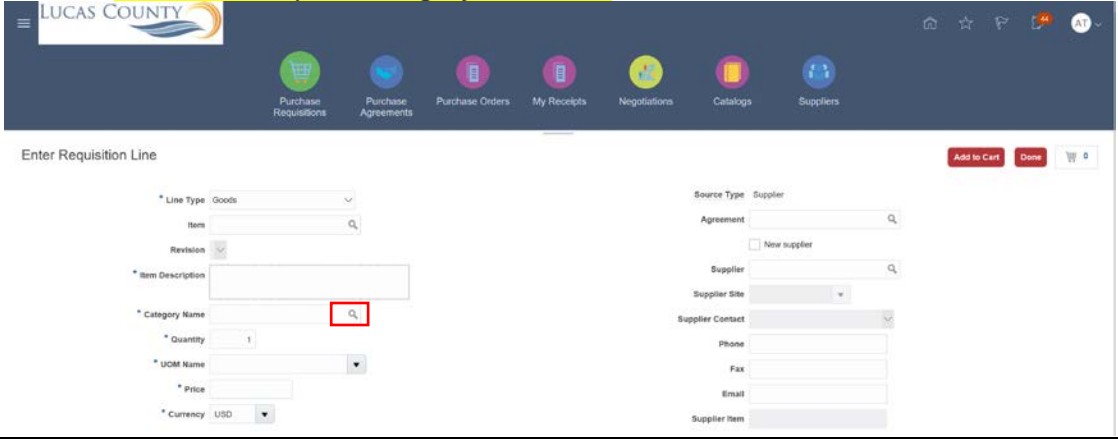


## Create Requisition Line Entry for a Non-Catalog for Goods

**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	<p>Log into Oracle. <b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p> 
3	Click the <b>Line Type</b> list.
4	Select the <b>Goods</b> list item from the drop down menu.

	<p>* Line Type <span>Goods</span></p>
5	<p>Click in the <b>Item Description</b> field.</p>  <p>The screenshot shows the 'Enter Requisition Line' form in the Lucas County procurement system. The 'Item Description' field is highlighted with a red box. Other fields include 'Line Type' (Goods), 'Item', 'Revision', 'Category Name', 'Quantity' (1), 'UOM Name', 'Price', 'Currency' (USD), 'Source Type' (Supplier), 'Agreement', 'New supplier' checkbox, 'Supplier', 'Supplier Site', 'Supplier Contact', 'Phone', 'Fax', 'Email', and 'Supplier Item'.</p>
6	<p>Enter information into the <b>Item Description</b> field.</p>
7	<p>Click in the <b>Category Name</b> field.</p>
8	<p>Click the <b>Search icon</b>: by the <b>Category Name</b> field.</p>  <p>The screenshot shows the 'Enter Requisition Line' form. The search icon next to the 'Category Name' field is highlighted with a red box. The 'Item Description' field is also visible. Other fields are the same as in the previous screenshot.</p>
9	<p>Click in the <b>Category Name</b> field.</p>
10	<p>Enter <b>Category Number</b> into <b>Category Name</b> field if known</p>

- 11 Click **Advance** button to search for Category Number/Description

The screenshot shows the 'Enter Requisition Line' interface. A modal window titled 'Search and Select: Category Name' is open. It has two tabs: 'Basic' and 'Advanced'. The 'Advanced' tab is selected, and the 'Advanced' button is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and buttons for 'Search', 'Reset', 'OK', and 'Cancel'.

- 12 Use the **Does not equal**, to get a list of all Category Name/Description

The screenshot shows the 'Enter Requisition Line' interface. A modal window titled 'Search and Select: Category Name' is open. It has two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is selected, and the 'Does not equal' dropdown is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and buttons for 'Search', 'Reset', 'Add Fields', 'Reorder', 'OK', and 'Cancel'.

- 13 Enter information into the **Description** or **Category** fields.

- 14 Click the **Search** button.

- 15 Make a selection from the search results list.

The screenshot shows the 'Enter Requisition Line' interface. A modal window titled 'Search and Select: Category Name' is open. It has two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is selected. The search results list is displayed, and the first item, '005 ABRASIVES', is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and buttons for 'Search', 'Reset', 'Add Fields', 'Reorder', 'OK', and 'Cancel'.

Category Name	Description
005	ABRASIVES
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
015	ADDRESSING, COPYING, MICROGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES, CHE...
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
021	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025	AIR COMPRESSORS AND ACCESSORIES
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SE
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES

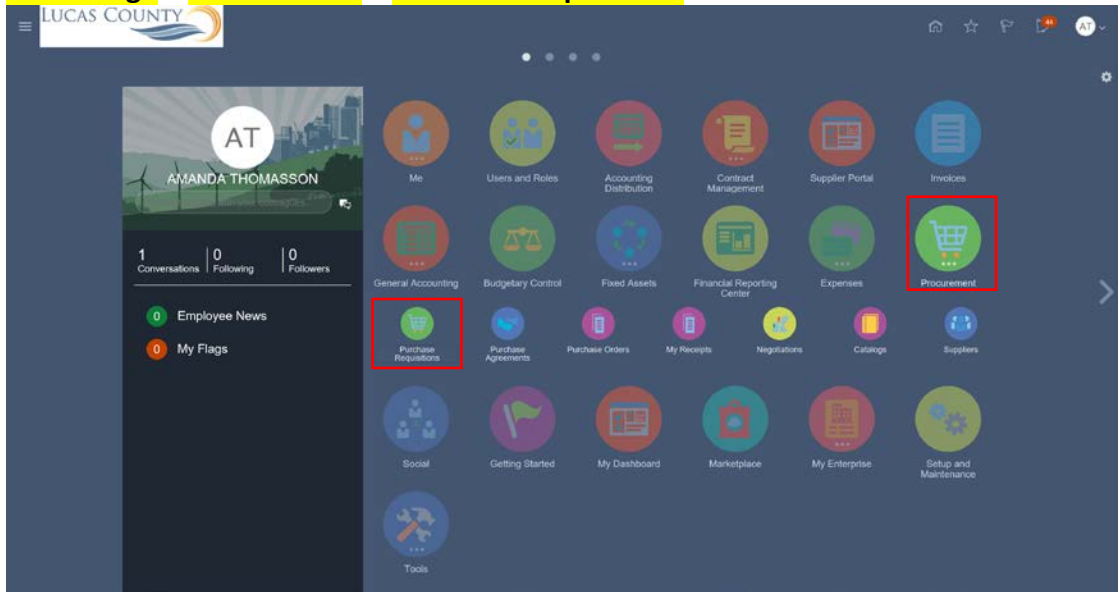
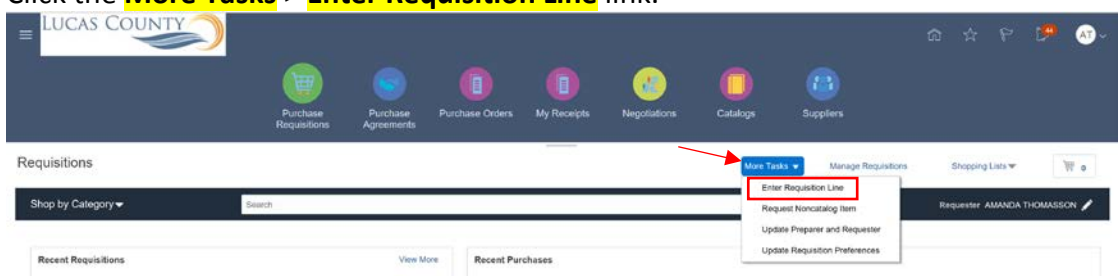
16	Click the <b>OK</b> button.
17	Click in the <b>Quantity</b> field.
18	Enter information into the <b>Quantity</b> field.
19	Click in the <b>UOM</b> field.
20	Enter information into the <b>UOM</b> field.
21	Click the <b>EA Quantity</b> Each list item.
22	Click in the <b>Price</b> field.
23	Enter information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

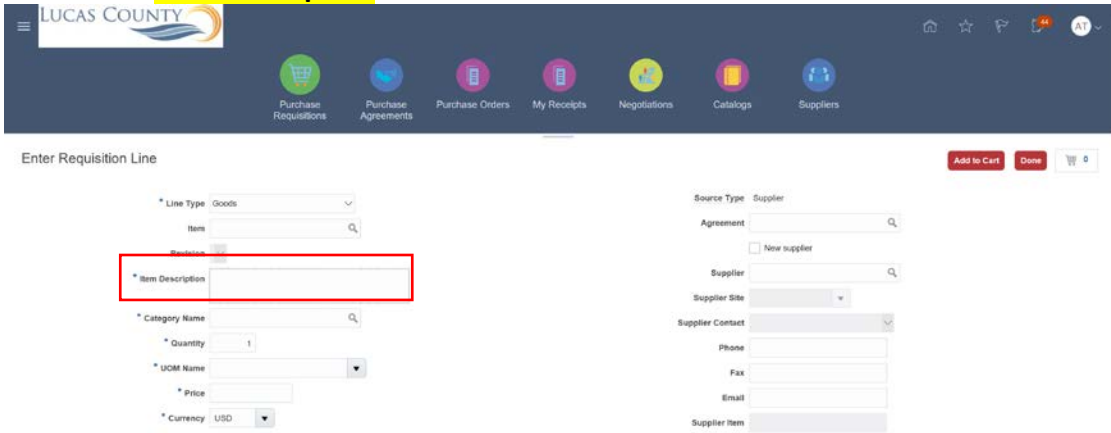
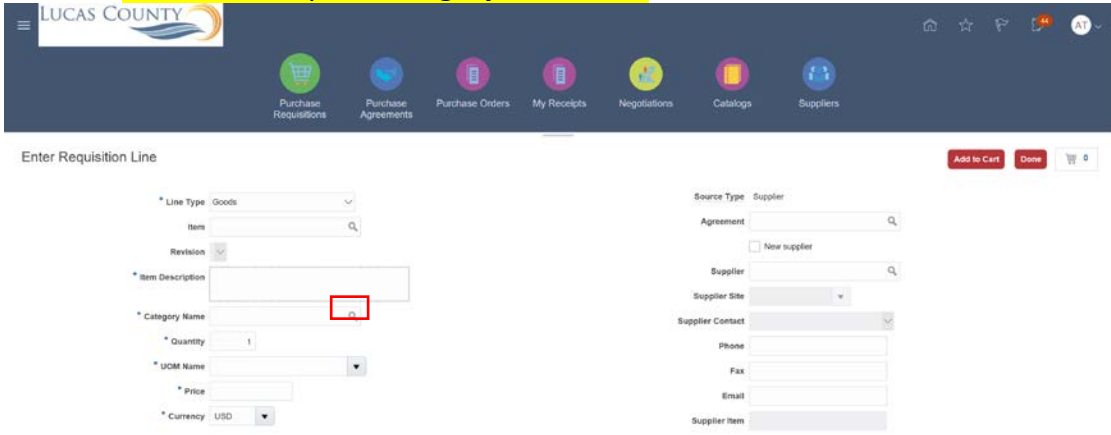


## Create Requisition Line Entry for a Non-Catalog for Goods (Agency)

**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	<p>Log into Oracle.</p> <p><b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p> 
3	Click the <b>Line Type</b> list.
4	Select the <b>Goods</b> list item from the drop down menu.

	<p>* Line Type <span>Goods</span> <span>▼</span></p>
5	<p>Click in the <b>Item Description</b> field.</p>  <p>The screenshot shows the 'Enter Requisition Line' form in the Lucas County system. The 'Item Description' field is highlighted with a red rectangle. Other fields visible include 'Line Type' (Goods), 'Item', 'Revision', 'Category Name', 'Quantity' (1), 'UOM Name', 'Price', 'Currency' (USD), 'Source Type' (Supplier), 'Agreement', 'New supplier' checkbox, 'Supplier', 'Supplier Site', 'Supplier Contact', 'Phone', 'Fax', 'Email', and 'Supplier Item'.</p>
6	Enter information into the <b>Item Description</b> field.
7	Click in the <b>Category Name</b> field.
8	<p>Click the <b>Search icon</b>: by the <b>Category Name</b> field.</p>  <p>The screenshot shows the 'Enter Requisition Line' form. The search icon in the 'Category Name' field is highlighted with a red rectangle. Other fields visible include 'Line Type' (Goods), 'Item', 'Revision', 'Item Description', 'Quantity' (1), 'UOM Name', 'Price', 'Currency' (USD), 'Source Type' (Supplier), 'Agreement', 'New supplier' checkbox, 'Supplier', 'Supplier Site', 'Supplier Contact', 'Phone', 'Fax', 'Email', and 'Supplier Item'.</p>
9	Click in the <b>Description</b> field.
10	Enter <b>Category Number</b> into <b>Category Name</b> field if known



- 11 Click **Advance** button to search for Category Number/Description

The screenshot shows the 'Enter Requisition Line' screen with a modal dialog titled 'Search and Select: Category Name'. The dialog has a 'Search' tab selected. The 'Category Name' field is empty, and the 'Description' field is also empty. The 'Advance' button is highlighted with a red box. The background shows the Lucas County logo and various navigation icons like 'Purchase Requisitions', 'Purchase Agreements', 'Purchase Orders', 'My Receipts', 'Negotiations', 'Catalogs', and 'Suppliers'.

- 12 Use the **Does not equal**, to get a list of all Category Name/Description

The screenshot shows the 'Enter Requisition Line' screen with the same modal dialog. The 'Category Name' dropdown is set to 'Does not equal', and the 'Description' dropdown is set to 'Starts with'. The 'Does not equal' dropdown is highlighted with a red box. The background shows the Lucas County logo and various navigation icons.

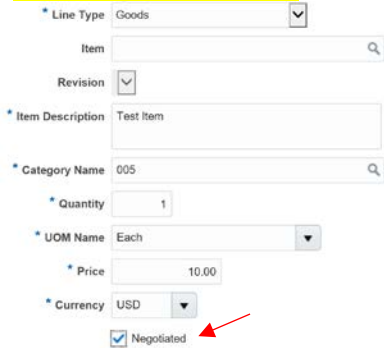

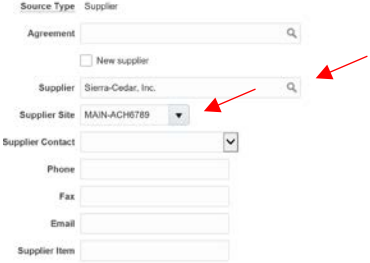
- 13 Enter information into the **Description** or **Category** fields.

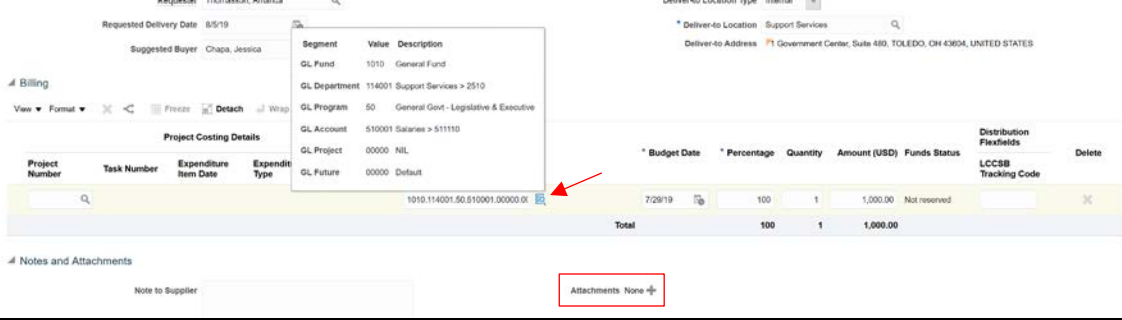
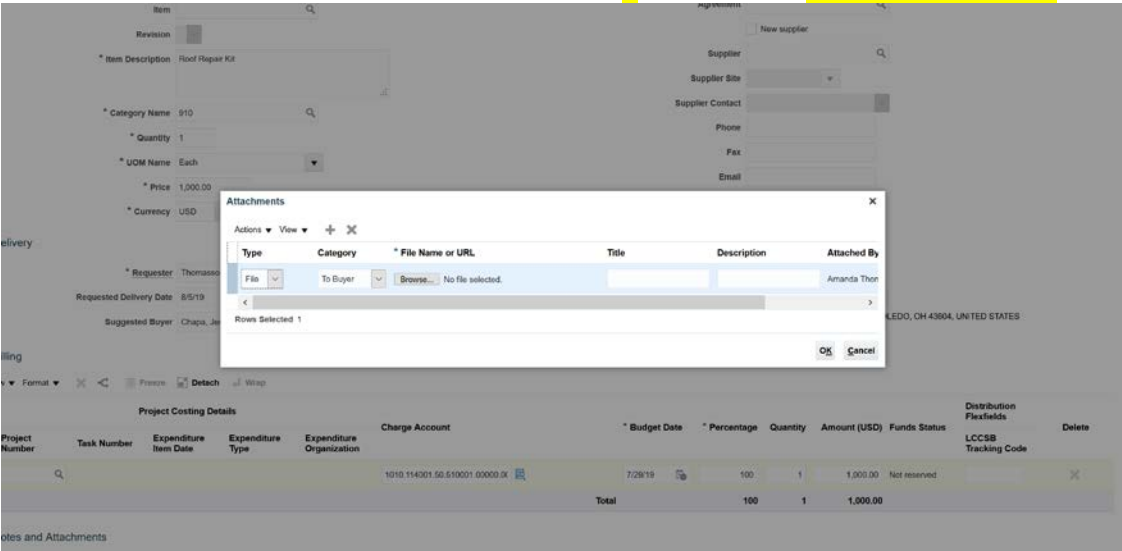
- 14 Click the **Search** button.

- 15 Make a selection from the search results list.

The screenshot shows the 'Enter Requisition Line' screen with the same modal dialog. The search results list is displayed, showing a table with 'Category Name' and 'Description' columns. The first item, '005 ABRASIVES', is highlighted with a red box. The background shows the Lucas County logo and various navigation icons.

Category Name	Description
005	ABRASIVES
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES, CHE...
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
021	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025	AIR COMPRESSORS AND ACCESSORIES
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SE
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES

16	Click the <b>OK</b> button.
17	Click in the <b>Quantity</b> field.
18	Enter information into the <b>Quantity</b> field.
19	Click in the <b>UOM</b> field.
20	Enter information into the <b>UOM</b> field.
21	Click the <b>EA Quantity</b> Each list item.
22	Click in the <b>Price</b> field.
23	Enter information into the <b>Price</b> field.
24	Click the <b>Negotiated Check Box</b> 
25	Enter <b>Suggested Buyer</b> (Suggested buyer is the buyer designated for the Department) 
26	<b>Search</b> and <b>Select the Supplier</b> and <b>Supplier Site</b> to whom the Purchase Order is to be issued 
27	Click the <b>Charge Account</b> icon and either accept default or add new applicable charge account information.

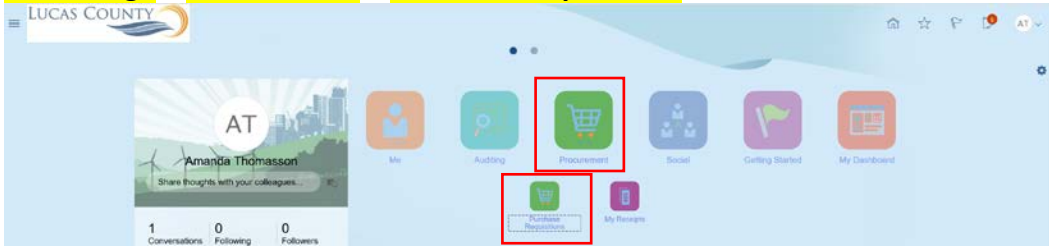
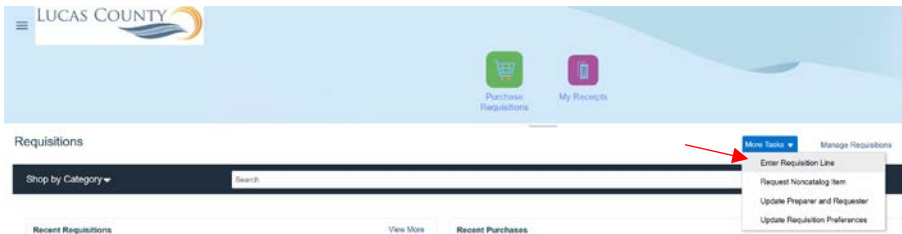
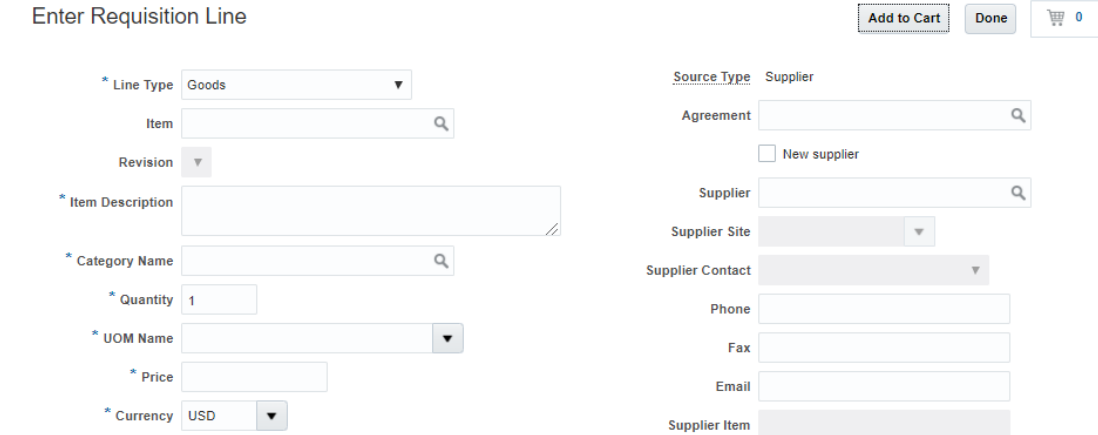
	
28	<p>In the Notes and Attachments section, click the + icon next to <b>Attachments None</b>.</p> 
29	In the Attachments window click the <b>Type</b> list.
30	Select the <b>File</b> list item.
31	Click the <b>Category</b> list.
32	Click to select the <b>To Buyer</b> list item.
33	Click the <b>Browse</b> button under <b>*File Name or URL</b> field.
34	Select a file for <b>Attachment</b> .
35	Click in the <b>Title</b> field.
36	Enter information into the <b>Title</b> field.
37	Click in the <b>Description</b> field and enter information into the <b>Description</b> field.
38	Click the <b>Add to Cart</b> button.


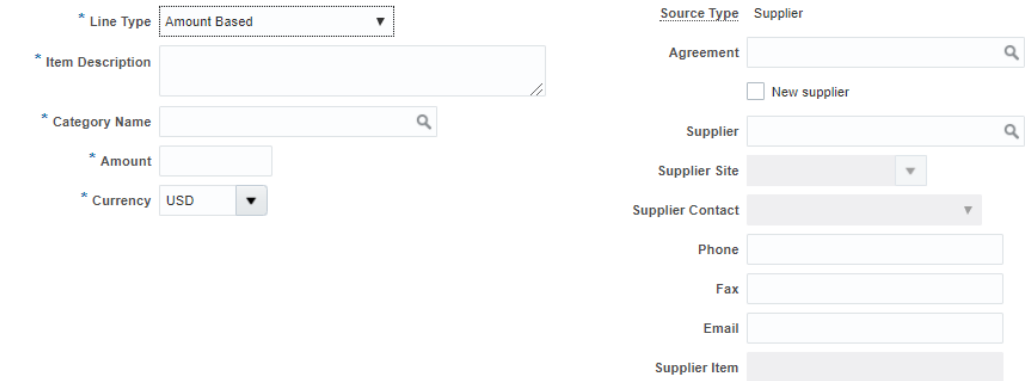
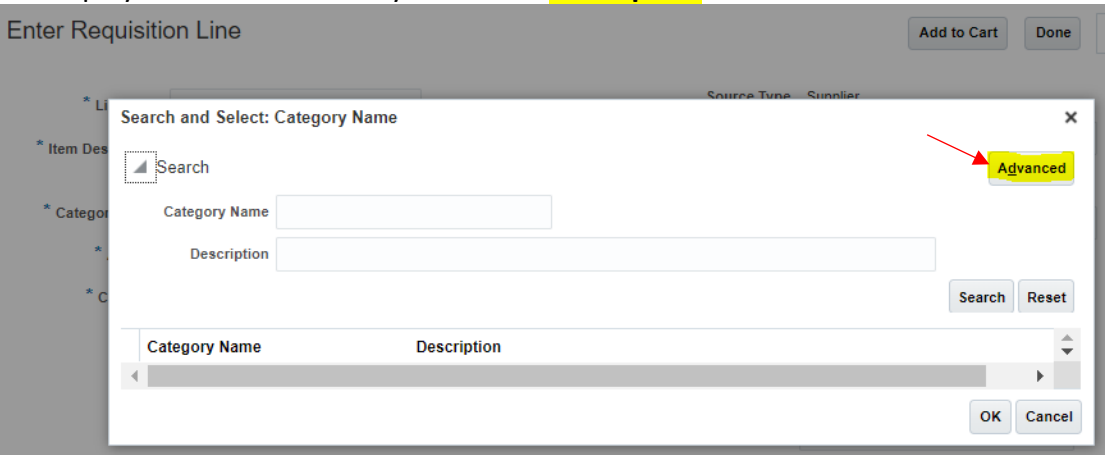
39	Click Shopping Cart icon and select <b>Review</b> .
40	Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b>
41	Enter if 'Y' is selected enter a number in the <b>State Contract Number</b> field.
42	Select Y/N <b>*Sole Source</b> ("If yes please attach proof of Sole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

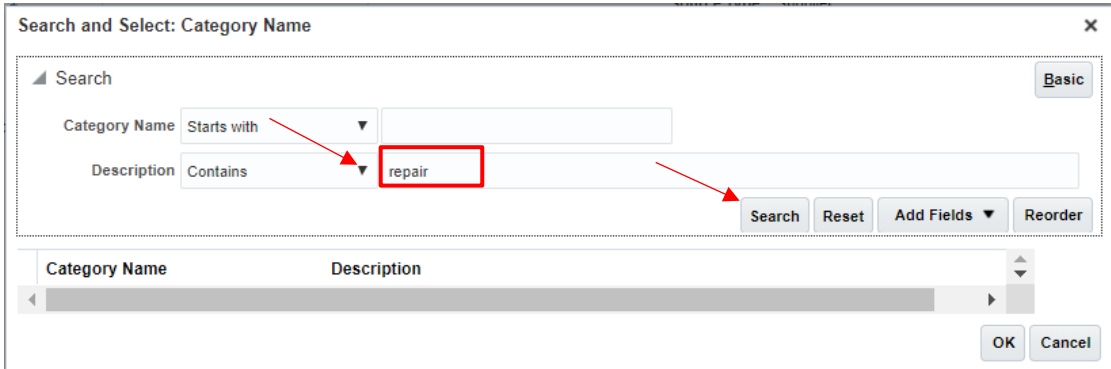
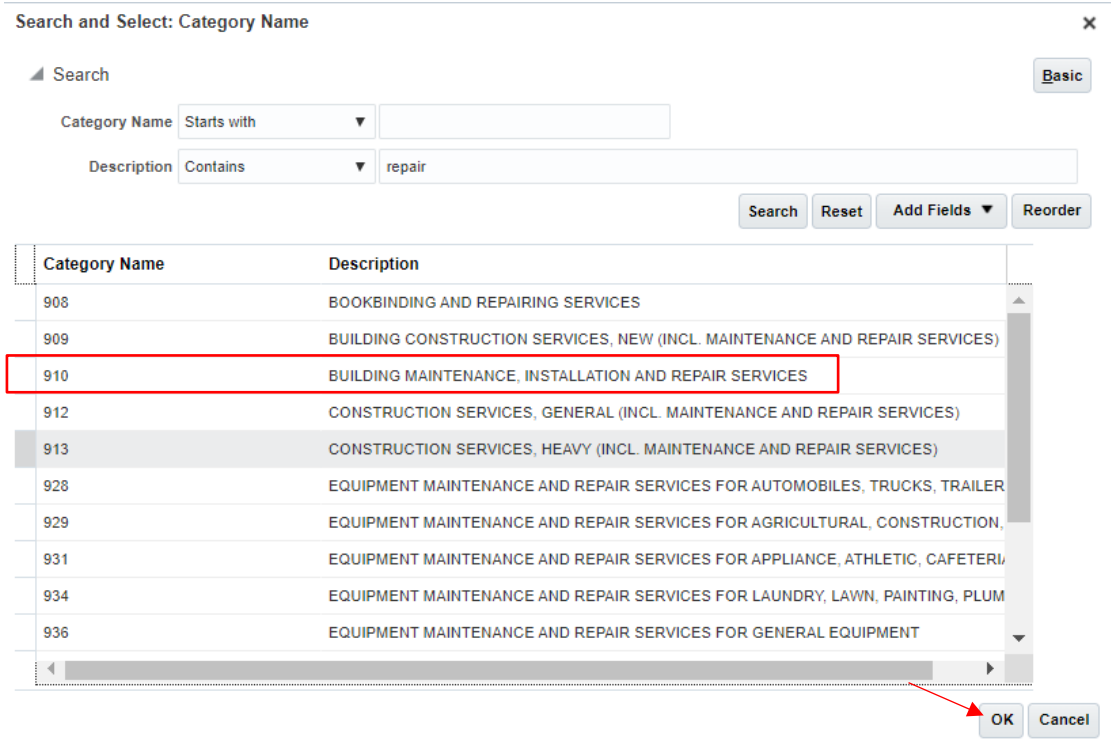
## Create Requisition Line Entry for a Non-Catalog Requisition for Services

**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	<p>Log into Oracle.</p> <p><b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p>  <p><b>Note:</b> <i>Services</i> are entered via <b>Enter Requisition Line</b>. Noncatalog Item is used for <i>items</i> not found in catalog.</p> <p>The <b>Enter Requisition Line</b> window displays fields for entry.</p> 

3	<p>The Line Type dropdown displays <b>Goods</b> by default. Choose from the <b>Line Type</b> dropdown and select <b>Amount Based</b> (which is for Services).</p> 
	<p>The fields change based on the Line Type of Amount Based.</p> <p>Enter Requisition Line <span>Add to Cart</span> <span>Done</span> <span>0</span></p> 
4	Click in the <b>Item Description</b> field and enter a description.
5	Category information is required. Click in the <b>Category Name</b> field and make a selection using the <b>Search</b> icon.
6	<p>Categories have names and longer descriptions. If the Category Name is unknown, you can use an <b>Advanced</b> search option to look up by known information. Results will display in a list immediately below the <b>Description</b> field.</p> 
7	<p>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 <b>Description</b> operator dropdown and select <b>Contains</b>. Then enter the word "repair" in the field. Upon clicking the <b>Search</b> button, the system will search for all category descriptions containing the word "repair".</p>

																							
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10	Click in the <b>Amount</b> field and enter the dollar amount information.																						
11	The <b>Currency</b> field defaults to USD.																						



Enter Requisition Line

Add to Cart

Done

0

\* Line Type

Amount Based

\* Item Description

Roof Repair Services

\* Category Name

910

\* Amount

5,000.00

\* Currency

USD

Source Type

Supplier

Agreement

☐ New supplier

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Supplier Item

Delivery

\* Requester

ASHFORD, RUTH

Requested Delivery Date

11-01-2019

Suggested Buyer

Deliver-to Location Type

Internal

\* Deliver-to Location

Support Services

Deliver-to Address

1 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES

Billing

View

Format

Freeze

Detach

Wrap

Charge Account	* Budget Date	* Percentage	Amount (USD)	Funds Status	Distribution Flexfields			Delet
					Special 1	Special 2	Special 3	
6030.114003.66.799999.00000.00000	10-25-2019	100	5,000.00	Not reserved				
Total			100	5,000.00				

Notes and Attachments

Note to Supplier

Attachments

None

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

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

Add to Cart

Done

1

Roof Repair Services

\$5,000.00

Total

\$5,000.00

Review

Submit

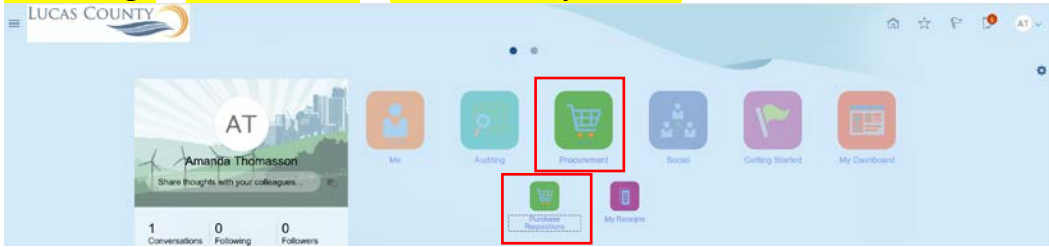
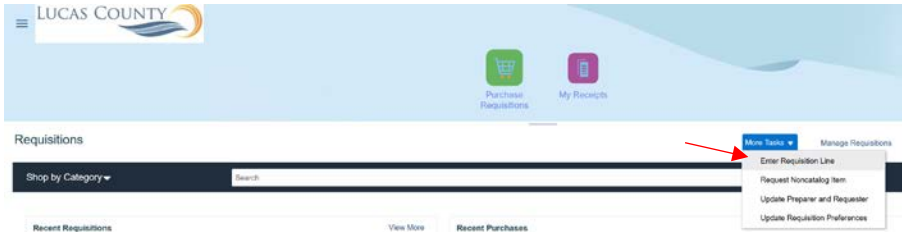
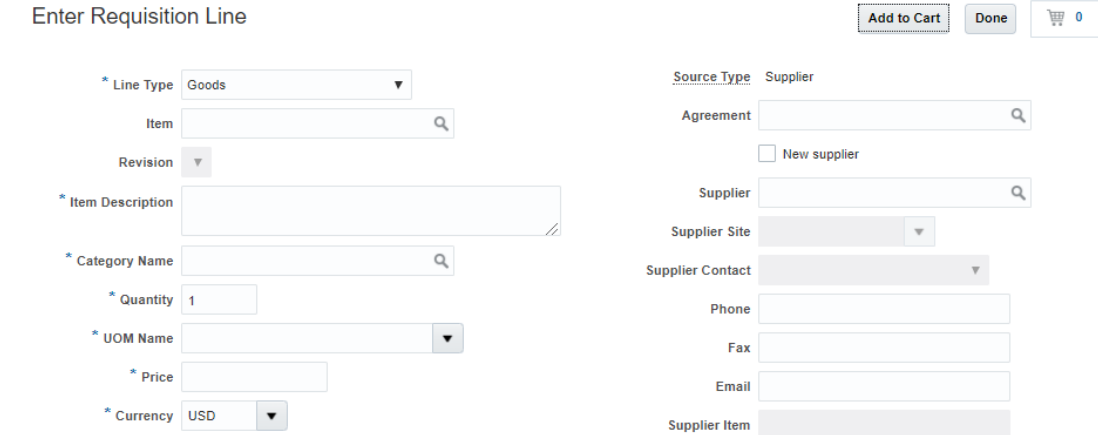
14 Answer the required questions using the dropdown buttons.

	<div><div>Edit Requisition: 1163</div><div><div>Shop</div><div>Check Funds</div><div>Manage Approvals</div><div>View PDF</div><div>Save</div><div>Submit</div></div></div> <div><div>Requisitioning BU Lucas County</div><div>Justification</div><div>* Description Roof Repair Services</div><div>* State Contract - If yes, please insert Contract Number</div><div>State Contract Number</div><div>* Sole Source - If yes please attach proof of Sole Source</div><div>* Resolution Attached</div><div>* Will Services be performed on Lucas County property?</div><div>* Does this purchase require the attachment of the LCIS Checklist?</div><div>Requisition Lines</div><div><div>Actions</div><div>View</div><div>Format</div><div>Freeze</div></div><div><table><tr><th>Line</th><th>Description</th><th>Category Name</th><th>* Quantity</th><th>UOM Name</th><th>* Price</th><th>* Amount</th><th>Amount (USD)</th><th>Funds Status</th><th>Delete</th></tr><tr><td>1</td><td>Roof Repair Service 910</td><td></td><td></td><td></td><td></td><td>5,000.00</td><td>US 5,000.00</td><td>Not reserved</td><td>X</td></tr><tr><td colspan="6">Total</td><td></td><td>5,000.00</td><td></td><td></td></tr></table></div></div>	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	X	Total							5,000.00		
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20	Click the <b>Check Funds</b> button located at the top of the window.																														
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21	A message will display regarding failure or success of the funds check. Click the <b>OK</b> button to acknowledge.																														
22	Click the <b>Manage Approvals</b> button to view the approvers.																														
	<div><div>Manage Approvals</div><div>View PDF</div><div>Save</div><div>Submit</div></div>																														
23	Click the <b>Back</b> button.																														
24	Click the <b>Submit</b> button.																														
25	Click the <b>OK</b> button.																														
26	Click the <b>Home</b> button.																														

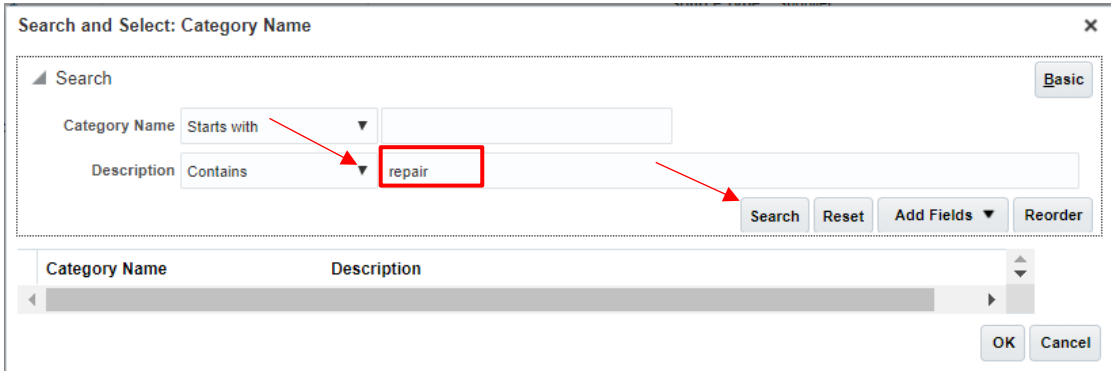
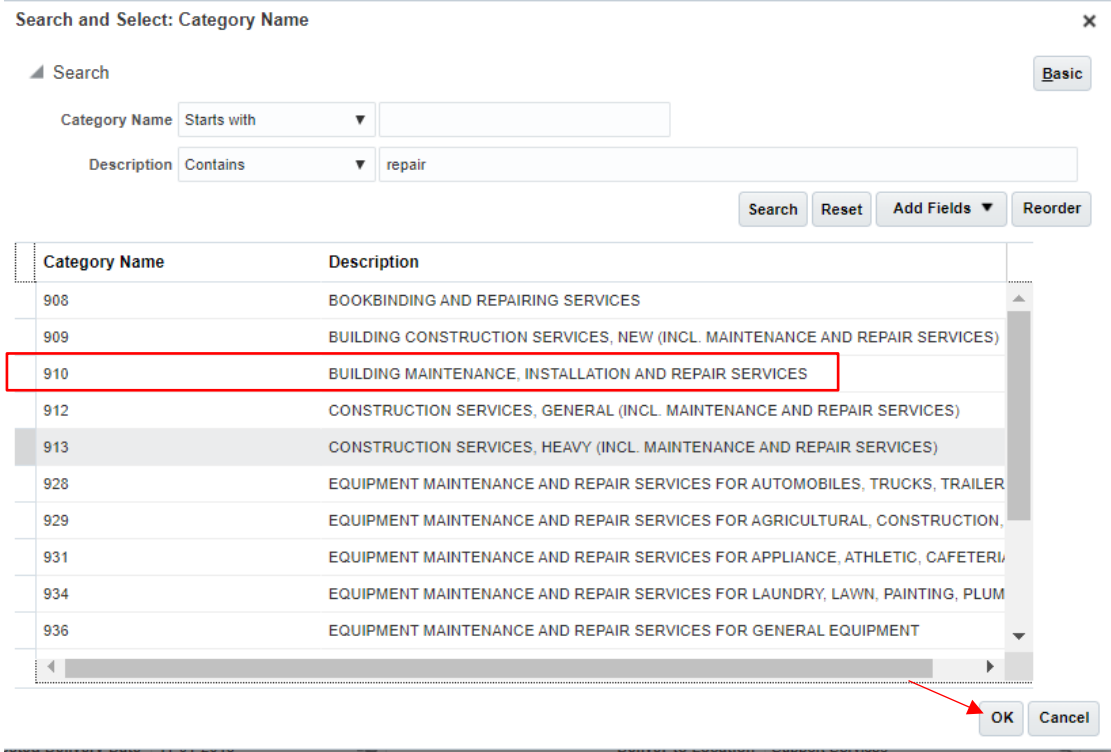
## Create Requisition Line Entry for a Non-Catalog Requisition for Services

**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	<p>Log into Oracle.</p> <p><b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p>  <p><b>Note:</b> <i>Services</i> are entered via <b>Enter Requisition Line</b>. Noncatalog Item is used for <i>items</i> not found in catalog.</p>
	<p>The <b>Enter Requisition Line</b> window displays fields for entry.</p> 

3	<p>The Line Type dropdown displays <b>Goods</b> by default. Click the <b>Line Type</b> dropdown and select <b>Amount Based</b> (which is for Services).</p> <p>* Line Type <input type="text" value="Amount Based"/></p>
	<p>The fields change based on the Line Type of Amount Based.</p> <p>Enter Requisition Line <span>Add to Cart</span> <span>Done</span> <span>0</span></p> <p>* Line Type <input type="text" value="Amount Based"/></p> <p>* Item Description <input type="text"/></p> <p>* Category Name <input type="text"/></p> <p>* Amount <input type="text"/></p> <p>* Currency <input type="text" value="USD"/></p> <p>Source Type Supplier</p> <p>Agreement <input type="text"/></p> <p><input type="checkbox"/> New supplier</p> <p>Supplier <input type="text"/></p> <p>Supplier Site <input type="text"/></p> <p>Supplier Contact <input type="text"/></p> <p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Email <input type="text"/></p> <p>Supplier Item <input type="text"/></p>
4	Click in the <b>Item Description</b> field and enter a description.
5	Category information is required. Click in the <b>Category Name</b> field and make a selection using the <b>Search</b> icon.
6	<p>Categories have names and longer descriptions. If the Category Name is unknown, you can use an <b>Advanced</b> search option to look up by known information. Results will display in a list immediately below the <b>Description</b> field.</p> <p>Enter Requisition Line <span>Add to Cart</span> <span>Done</span></p> <p>* Line Type <input type="text" value="Amount Based"/></p> <p>* Item Description <input type="text"/></p> <p>* Category Name <input type="text"/></p> <p>* Amount <input type="text"/></p> <p>* Currency <input type="text" value="USD"/></p> <p>Source Type Supplier</p> <p>Agreement <input type="text"/></p> <p><input type="checkbox"/> New supplier</p> <p>Supplier <input type="text"/></p> <p>Supplier Site <input type="text"/></p> <p>Supplier Contact <input type="text"/></p> <p>Phone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>Email <input type="text"/></p> <p>Supplier Item <input type="text"/></p> <p>Search and Select: Category Name</p> <p><input type="text" value="Search"/></p> <p>Category Name <input type="text"/></p> <p>Description <input type="text"/></p> <p><input type="button" value="Advanced"/></p> <p><input type="button" value="Search"/> <input type="button" value="Reset"/></p> <p>Category Name Description</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p>
7	<p>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 <b>Description</b> operator dropdown and select <b>Contains</b>. Then enter the word "repair" in the field. Upon clicking the <b>Search</b> button, the system will search for all category descriptions containing the word "repair".</p>

																							
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11	The <b>Currency</b> field defaults to USD.																						

Enter Requisition Line

Add to Cart

Done

0

\* Line TypeAmount Based

\* Item DescriptionRoof Repair Services

\* Category Name910

\* Amount5,000.00

\* CurrencyUSD

Source TypeSupplier

Agreement

☐ New supplier

Supplier

Supplier Site

Supplier Contact

Phone

Fax

Email

Supplier Item

Delivery

\* RequesterASHFORD, RUTH

Requested Delivery Date11-01-2019

Suggested Buyer

Deliver-to Location TypeInternal

\* Deliver-to LocationSupport Services

Deliver-to Address1 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES

Billing

ViewFormatFreezeDetachWrap

Charge Account	* Budget Date	* Percentage	Amount (USD)	Funds Status	Distribution Flexfields			Delet
					Special 1	Special 2	Special 3	
6030.114003.66.799999.00000.00000	10-25-2019	100	5,000.00	Not reserved				
Total			100	5,000.00				

Notes and Attachments

Note to Supplier

AttachmentsNone

12Click the **Add to Cart** button.

13Click Shopping Cart icon and select **Review**.

Add to Cart

Done

1

Roof Repair Services

\$5,000.00

\$5,000.00

Total

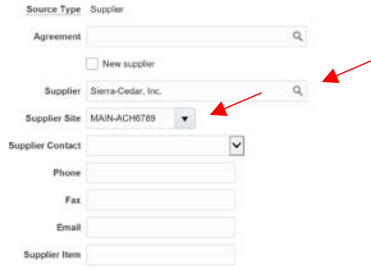
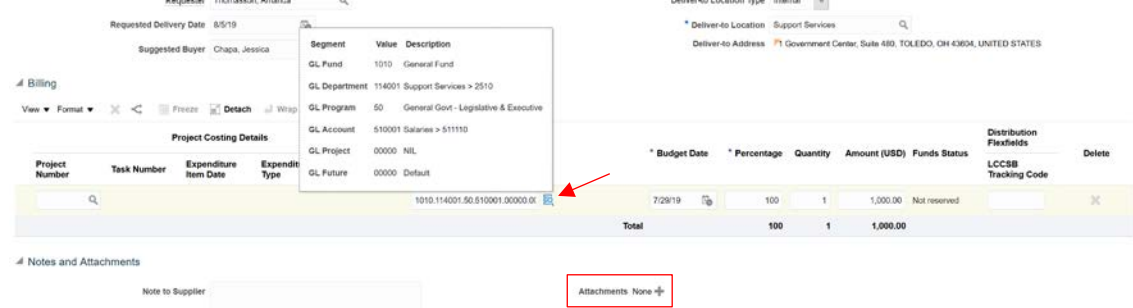
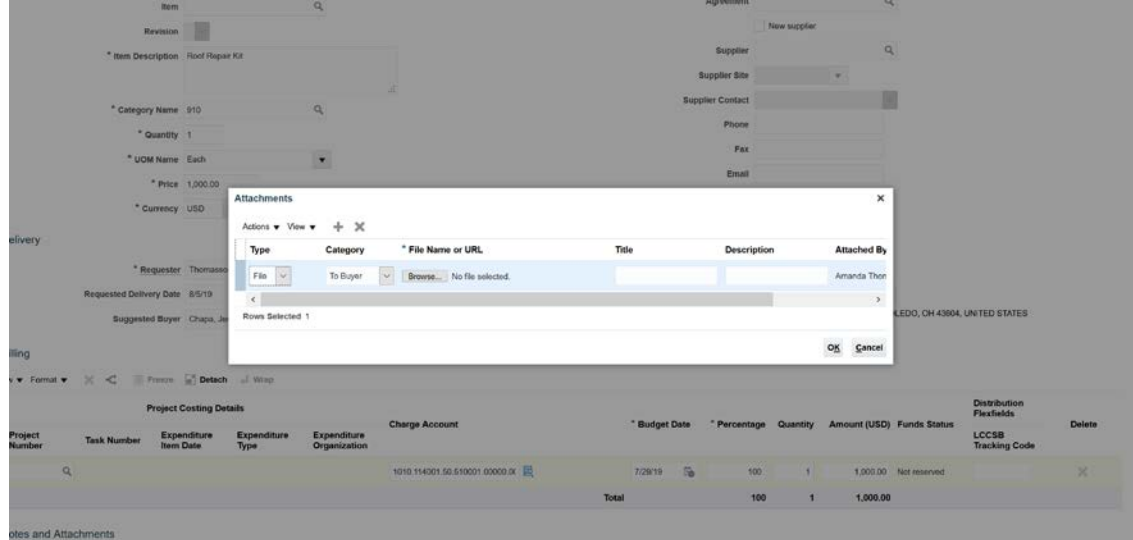
\$5,000.00

Review

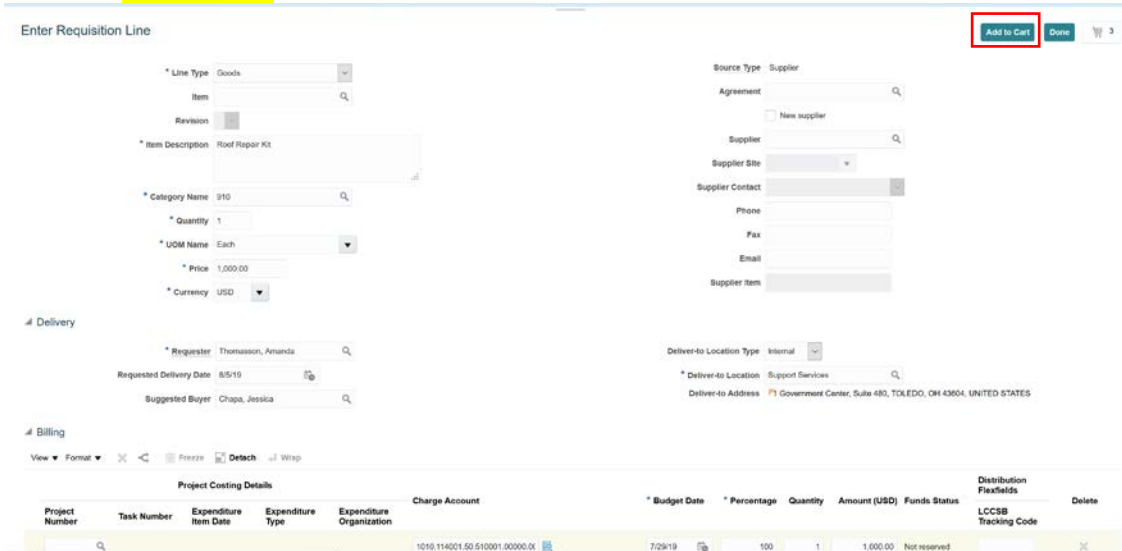
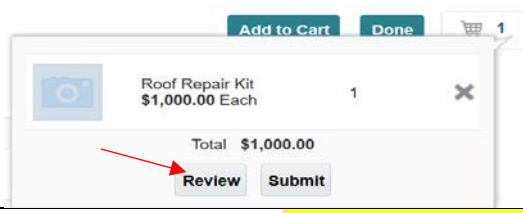
Submit

14Answer the required questions using the dropdown buttons.

	<p>Edit Requisition: 1163</p> <p>Requisitioning BU: Lucas County</p> <p>* Description: Roof Repair Services</p> <p>* State Contract - If yes, please insert Contract Number: <input type="text"/></p> <p>State Contract Number: <input type="text"/></p> <p>* Sole Source - If yes please attach proof of Sole Source: <input type="text"/></p> <p>* Resolution Attached: <input type="text"/></p> <p>* Will Services be performed on Lucas County property?: <input type="text"/></p> <p>* Does this purchase require the attachment of the LCIS Checklist?: <input type="text"/></p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Category Name</th> <th>Quantity</th> <th>UOM Name</th> <th>Price</th> <th>Amount</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Roof Repair Service 910</td> <td></td> <td></td> <td></td> <td></td> <td>5,000.00</td> <td>US 5,000.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="6">Total</td> <td></td> <td>5,000.00</td> <td></td> <td></td> </tr> </tbody> </table>	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	X	Total							5,000.00		
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20	<p>Click the <b>Negotiated Check Box</b></p> <p>* Line Type: Goods</p> <p>Item: <input type="text"/></p> <p>Revision: <input type="text"/></p> <p>* Item Description: Test Item</p> <p>* Category Name: 005</p> <p>* Quantity: 1</p> <p>* UOM Name: Each</p> <p>* Price: 10.00</p> <p>* Currency: USD</p> <p><input checked="" type="checkbox"/> Negotiated</p>																														
21	<p>Enter <b>Suggested Buyer</b> (Suggested buyer is the buyer designated for the Department)</p> <p>Delivery</p> <p>* Requester: THOMAS, BRENDAN</p> <p>Urgent: No</p> <p>Requested Delivery Date: 11-27-2019</p> <p>Suggested Buyer: THOMAS, BRENDAN</p>																														
22	<p><b>Search</b> and <b>Select the Supplier</b> and <b>Supplier Site</b> to whom the Purchase Order is to be issued</p>																														

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

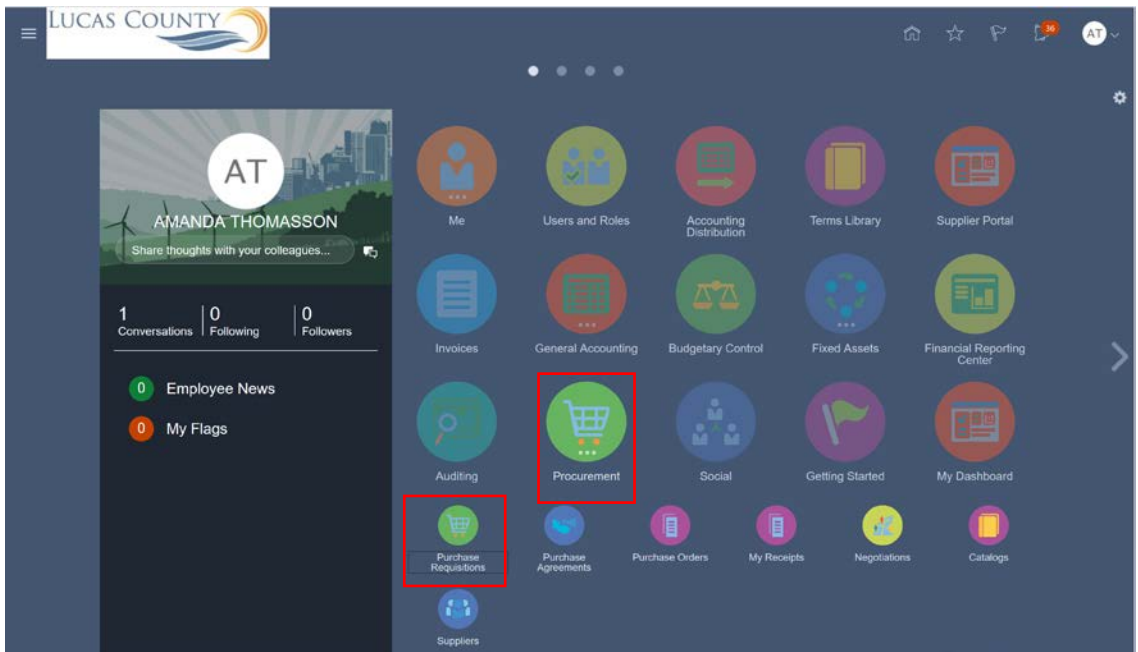


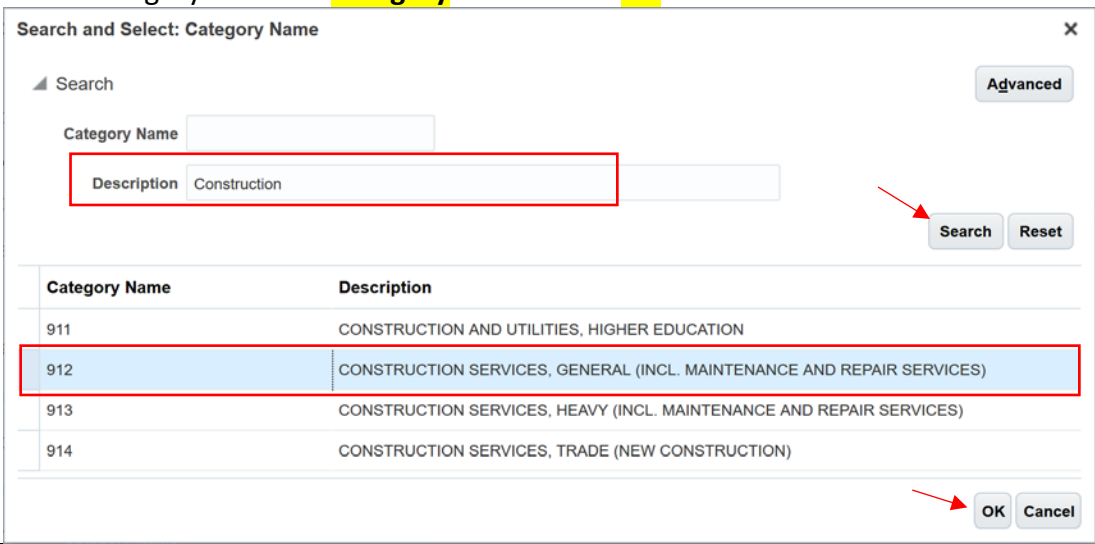
34	Click the <b>Add to Cart</b> button.
	
35	Click Shopping Cart icon and select <b>Review</b> .
	
36	Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b>
37	Enter if 'Y' is selected enter a number in the <b>State Contract Number</b> field.
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39	Select Y/N <b>*Resolution Attached.</b>
40	Select Y/N <b>*Will Services be performed on Lucas County property?</b>
41	Click the <b>Submit</b> button.
42	Click the <b>OK</b> button.

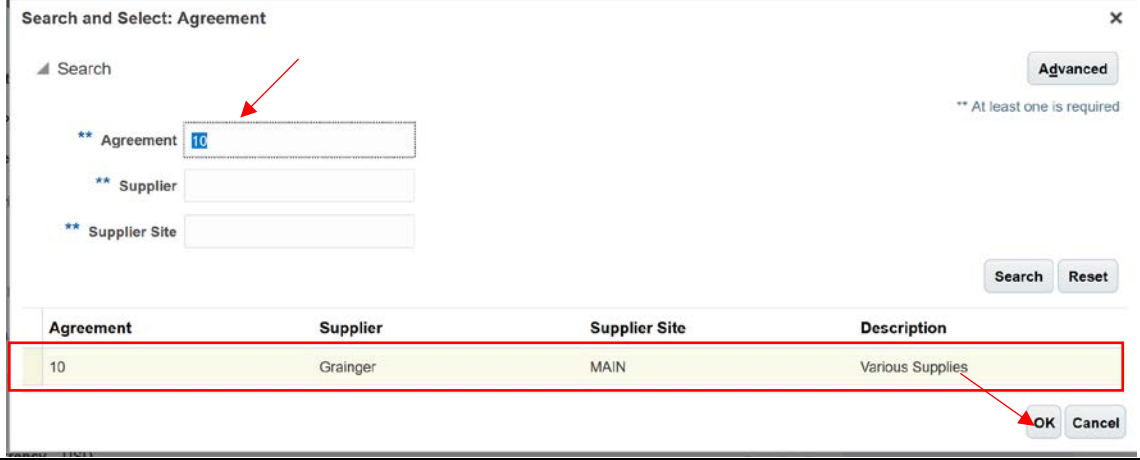

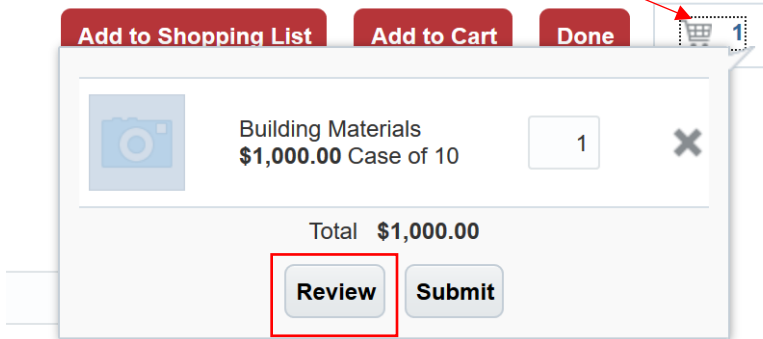
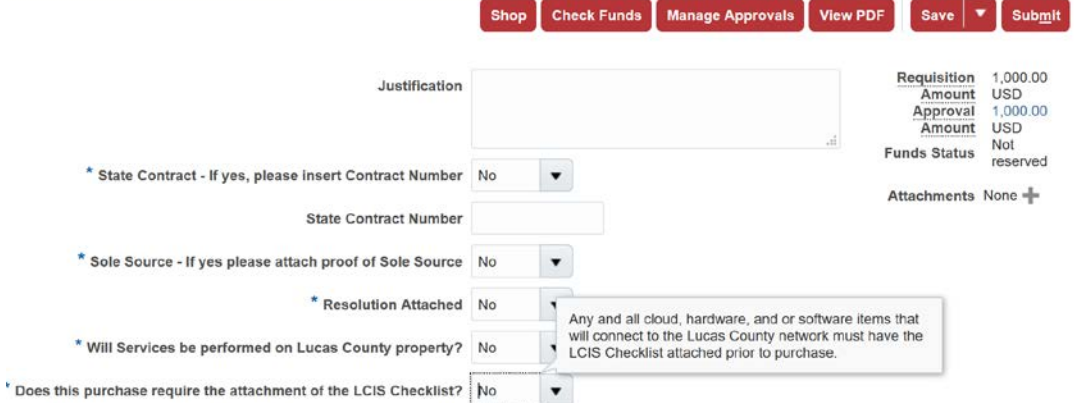
## Create Requisition for Goods Referencing a CPA

**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	<p>Login to Oracle. <b>Home Page -&gt; Procurement -&gt; Purchase Requisitions</b></p>  <p>The screenshot shows the Oracle Home Page for Amanda Thomasson. The page features a grid of application icons. The 'Procurement' icon, which is a green circle with a white shopping cart, is highlighted with a red rectangular box. Below it, the 'Purchase Requisitions' icon is also highlighted with a red rectangular box. Other visible icons include Me, Users and Roles, Accounting Distribution, Terms Library, Supplier Portal, Invoices, General Accounting, Budgetary Control, Fixed Assets, Financial Reporting Center, Auditing, Social, Getting Started, My Dashboard, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers.</p>
2	<p>Under <b>Request Forms</b>, select <b>Contract Purchase – Goods</b>.</p>

	<div> <h3>Request Forms</h3> <ul style="list-style-type: none"> <li>Contract Purchase - Goods</li> <li>Contract Purchase -Services</li> </ul> </div>										
3	Click in the Item <b>Description</b> field.										
4	Enter the <b>Item Description</b> information into the Item Description field.										
5	Click in the <b>Category Name</b> search icon.										
6	Enter information into the <b>Category</b> description field and click the <b>Search</b> button.										
7	<p>Select category from the <b>Category</b> list and click <b>OK</b>.</p>  <table border="1"> <thead> <tr> <th>Category Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>911</td> <td>CONSTRUCTION AND UTILITIES, HIGHER EDUCATION</td> </tr> <tr> <td>912</td> <td>CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)</td> </tr> <tr> <td>913</td> <td>CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)</td> </tr> <tr> <td>914</td> <td>CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)</td> </tr> </tbody> </table>	Category Name	Description	911	CONSTRUCTION AND UTILITIES, HIGHER EDUCATION	912	CONSTRUCTION SERVICES, GENERAL (INCL. MAINTENANCE AND REPAIR SERVICES)	913	CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)	914	CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)
Category Name	Description										
911	CONSTRUCTION AND UTILITIES, HIGHER EDUCATION										
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913	CONSTRUCTION SERVICES, HEAVY (INCL. MAINTENANCE AND REPAIR SERVICES)										
914	CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)										
8	Enter a <b>Quantity</b> .										
9	Click in the <b>UOM Name</b> field and select Each.										
10	Click in the <b>Price</b> field and enter a price.										
11	Click in the <b>Currency</b> field. Currency should default to USD.										
12	Click in the <b>Agreement</b> field and enter the Agreement Number information or use the <b>Search</b> function to find the Agreement.										
13	The Agreement will display. Select the line for the Agreement and click the <b>Ok</b> button.										

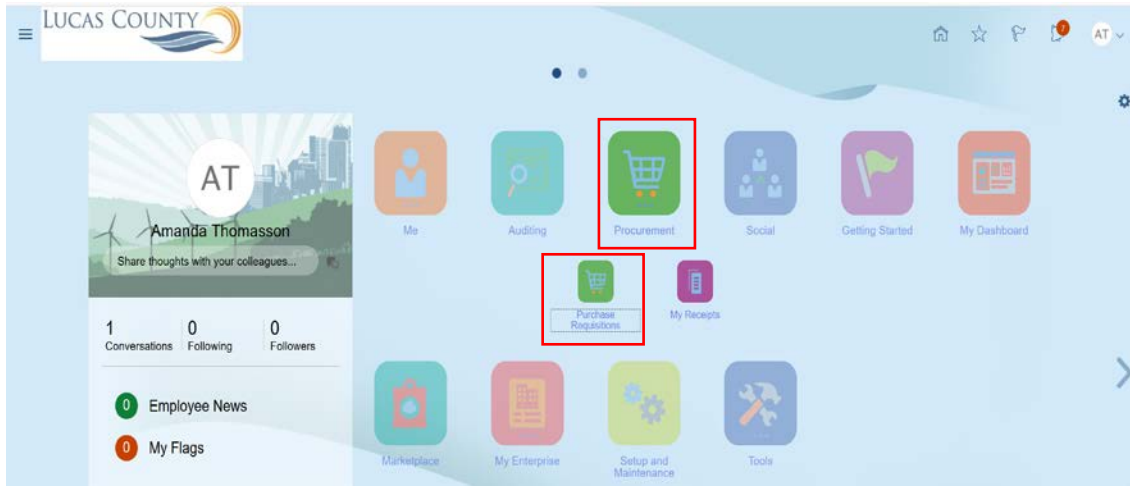
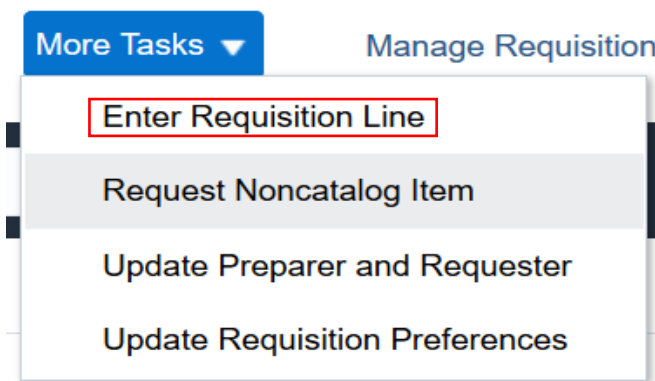
	
14	<p>Click the <b>Add to Cart</b> button.</p> 
15	<p>Click the <b>Shopping Cart Link</b> and then click the <b>Review</b> button.</p> 
16	<p>Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b></p> 
17	<p>Enter if 'Y' is selected enter a number in the <b>State Contract Number</b> field.</p>
18	<p>Select Y/N <b>*Sole Source</b> ("If yes please attach proof of Sole Source").</p>

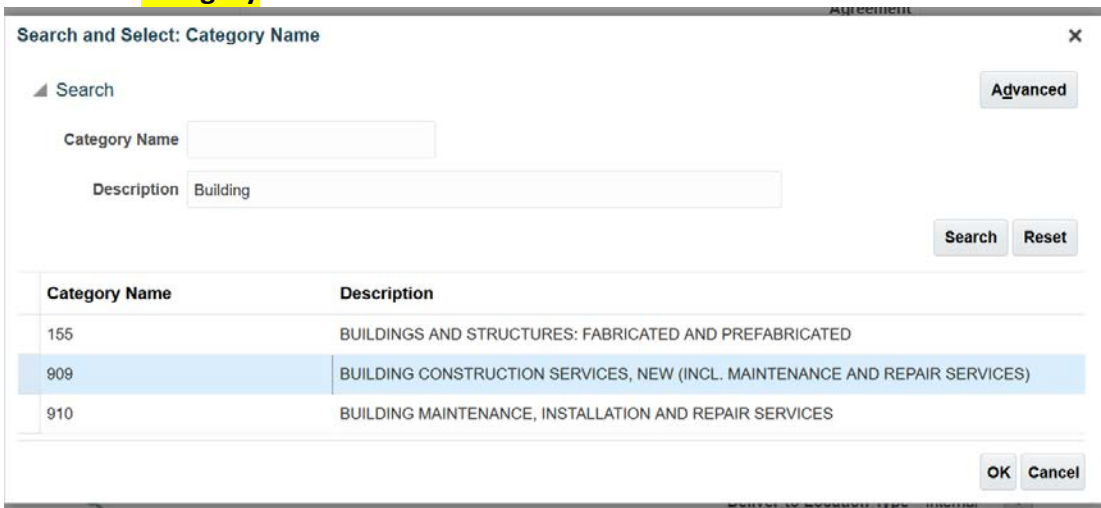
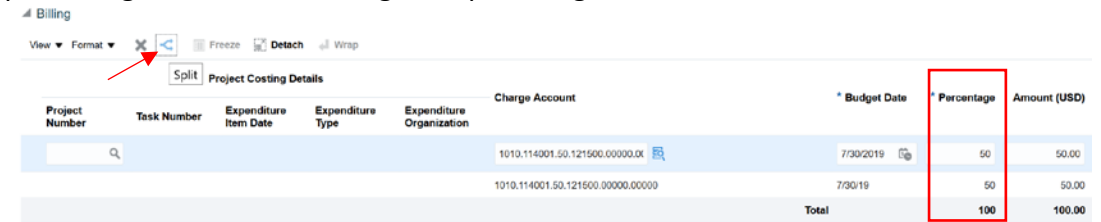
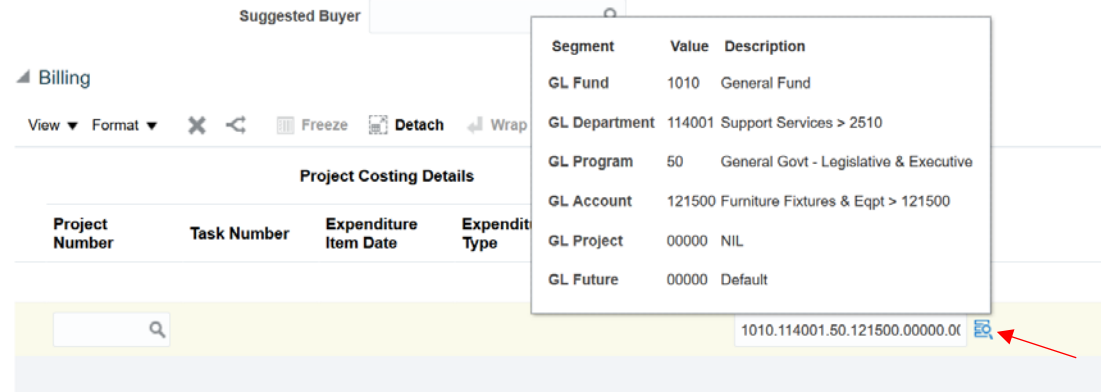
19	Select Y/N <b>*Resolution Attached</b> . (If yes attach resolution).																											
20	Select Y/N <b>*Will Services be performed on Lucas County property?</b>																											
21	Select Y/N <b>*Does this purchase require the attachment of the LCIS Checklist?</b> (Any and all 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 <b>Check Funds</b> button to verify budgeting. <div><div>Shop</div><div>Check Funds</div><div>Manage Approvals</div><div>View PDF</div><div>Save</div><div>Submit</div></div>																											
23	Click the <b>OK</b> button.																											
24	Click the <b>Submit</b> button to route the requisition for approval. <div><div>Edit Requisition: 81</div><div><div>Shop</div><div>Check Funds</div><div>Manage Approvals</div><div>View PDF</div><div>Save</div><div>Submit</div></div><div><div><div>Requisitioning BU Lucas County</div><div>* Description Building Materials</div></div><div><div>Justification</div><div>* State Contract - If yes, please insert Contract Number No</div><div>State Contract Number</div><div>* Sole Source - If yes please attach proof of Sole Source No</div><div>* Resolution Attached No</div><div>* Will Services be performed on Lucas County property? No</div><div>* Does this purchase require the attachment of the LCIS Checklist? No</div></div><div><div>Requisition Amount 1,000.00 USD</div><div>Approval Amount 1,000.00 USD</div><div>Funds Status Not reserved</div><div>Attachments None</div></div></div><div><div>Requisition Lines</div><div><div>Actions</div><div>View</div><div>Format</div><div></div><div></div><div></div><div></div><div>Freeze</div><div>Detach</div><div>Wrap</div></div><table><thead><tr><th>Line</th><th>Description</th><th>Category Name</th><th>* Quantity</th><th>UOM Name</th><th>Price</th><th>Amount (USD)</th><th>Funds Status</th><th>Delete</th></tr></thead><tbody><tr><td>1</td><td>Building Materials</td><td>912</td><td>1</td><td>Case of 10</td><td>1,000.00 USD</td><td>1,000.00</td><td>Not reserved</td><td>X</td></tr><tr><td colspan="6">Total</td><td>1,000.00</td><td></td><td></td></tr></tbody></table><div>Rows Selected 1 Columns Hidden 8</div></div></div>	Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete	1	Building Materials	912	1	Case of 10	1,000.00 USD	1,000.00	Not reserved	X	Total						1,000.00		
Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete																				
1	Building Materials	912	1	Case of 10	1,000.00 USD	1,000.00	Not reserved	X																				
Total						1,000.00																						
25	A confirmation message will display. Click the <b>OK</b> 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	<p>Log into Oracle.  <b>Home Page</b> &gt; <b>Procurement</b> &gt; <b>Purchase Requisitions</b> &gt; <b>More Tasks</b></p> 
2	<p>Click the <b>Enter Requisition Line</b> link.</p> 
3	Click the <b>Line Type</b> list.
4	Click the <b>Amount Based</b> from the drop down list.
5	Click in the Item <b>Description</b> field.

6	Enter information into the <b>Item Description</b> field.
7	Click the <b>Search: Category</b> icon and enter information into the <b>Description</b> field.
8	Click the <b>Search: Category Name</b> button.
9	Enter information into the <b>Description</b> field.
10	Click the <b>Search</b> button.
11	Select the <b>Category</b> . 
12	Click the <b>OK</b> button.
13	Click in and enter information into the <b>Amount</b> field.
14	Enter 50 into the Billing *Percentage field.
15	Click the <b>Split</b> 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 <b>*Charge Account</b> icon. 

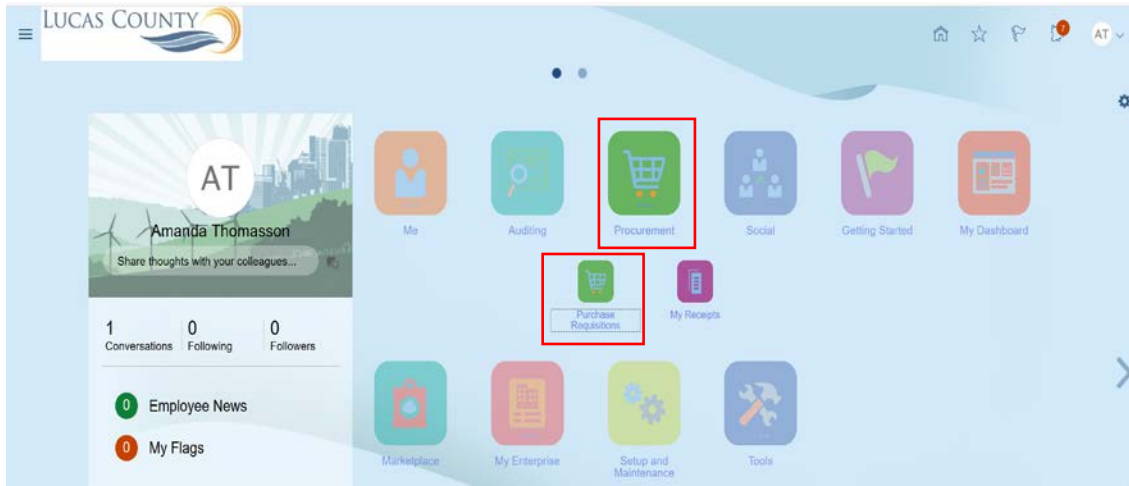
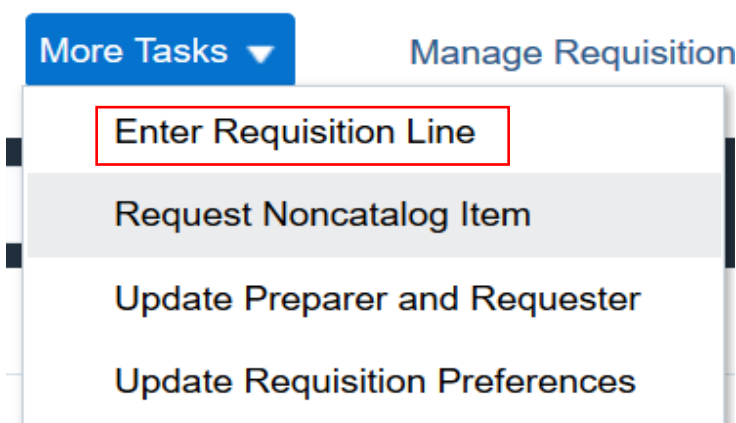
17	Enter applicable <b>Charge Account</b> segments.
18	Click <b>Add to Cart</b> button.
19	Click the <b>Shopping Cart</b> and select <b>Review</b> to go to the Edit Requisition page.
20	Select Y/N option for <b>*State Contract - If yes, please insert Contract Number.</b>
21	Enter if 'Y' is selected enter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

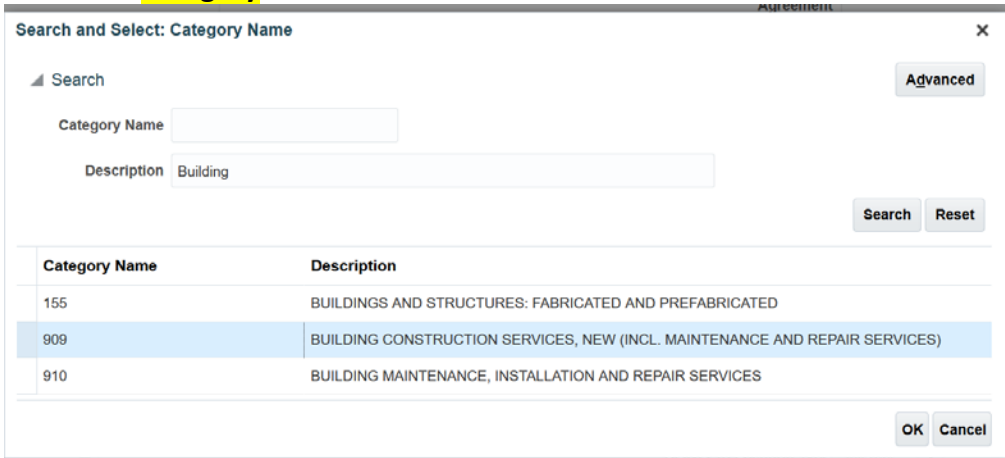


## Create Requisition with Multiple Requisition Lines

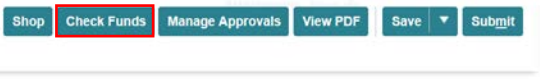
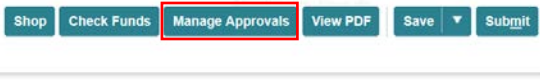
**Audience:** Requester, Buyer

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

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

	<p>Requisition Lines</p> <p>Actions View Format Freeze Detach Wrap</p> <p>Duplicate</p> <p>Edit</p> <p>Delete</p> <p>View Punchout Cart</p> <p>Total</p>
32	Select the duplicated row and click the <b>Actions</b> menu.
33	Select the <b>Edit</b> option.
34	Click the <b>Item Description</b> field and modify description.
35	Click in the <b>Price</b> field and modify price.
36	Click the <b>OK</b> button.
37	Click the <b>Search: Deliver-to Location</b> icon.
38	Click in the <b>Name</b> field and type a partial name.
39	Click in the <b>Search</b> button.
40	Select the Deliver-to Location in the <b>Name</b> cell.
41	Click the <b>OK</b> button.
42	Click the <b>Save</b> button.

43	Click the <b>Check Funds</b> button. 
44	Click the <b>OK</b> button.
45	Click the <b>Manage Approvals</b> button. 
46	Click the <b>Back</b> button.
47	Click the <b>Submit</b> button.
48	Click the <b>OK</b> 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
	<b>Create requisition copied from another requisition.</b>
1	<p>Log into Oracle. <b>Home Page -&gt; Procurement &gt;Purchase Requisitions -&gt; Manage Requisitions</b></p>  <p>The screenshot shows the Oracle Home Page for user AMANDA THOMASSON. The page features a grid of application icons. The 'Procurement' icon, which is a green circle with a white shopping cart, is highlighted with a red rectangular box. Below the 'Procurement' icon, the 'Purchase Requisitions' icon is also highlighted with a red rectangular box. The 'Purchase Requisitions' icon is a green circle with a white shopping cart and the text 'Purchase Requisitions' below it.</p>
2	Within the Requisitions page, click the <b>Manage Requisitions</b> 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.

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1164	TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x ...	10-29-2019	306.84 USD	Pending approval	Not reserved	
1159	MONITOR	10-22-2019	24.93 USD	Approved	Liquidated	190078
1121	Pest Control Services -Monthly -Office Complex 701 Adams S...	10-21-2019	49.00 USD	Approved	Liquidated	190026
1104	TEST NON CATALOG FURNITURE	10-21-2019	300.00 USD	Approved	Liquidated	190042
1094	MONITOR	10-21-2019	500.00 USD	Approved	Liquidated	190039
1093	BIC Soft Feel Retractable Ballpoint Pens, Medium Point, Asso...	10-21-2019	139.90 USD	Approved	Liquidated	190038
1089	Pest Control Services -Monthly -Office Complex 701 Adams S...	10-21-2019	49.00 USD	Approved	Liquidated	190037
1041	Pest Control Services -Monthly -Vehicle Maintenance 644 Sta...	10-18-2019	228.00 USD	Pending approval	Not reserved	
1040	Pest Control Services -Monthly -Vehicle Maintenance 644 Sta...	10-18-2019	38.00 USD	Pending approval	Not reserved	

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 <b>*Amount</b> 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 <b>Line Details</b> , validate and edit <b>Delivery</b> (date and location), <b>Billing</b> , <b>Notes and attachments</b> , and <b>Source</b> information only if different from what was copied. <div><div>Line 1: Details</div><div>Delivery</div><div><div>RequesterGLANVILLE, MICHELLE</div><div>Requested Delivery Date11-07-2019</div><div>Suggested Buyer</div><div>Deliver-to Location TypeInternal</div><div>* Deliver-to LocationMental Health Recovery Service</div><div>Deliver-to Address701 Adams Street, Suite 800, TOLEDO, OH 43604, UNITED STATES</div></div><div>Billing</div><div>ViewFormatFreezeDetachWrap</div><table><thead><tr><th>Charge Account Nickname</th><th>Charge Account</th><th>* Budget Date</th><th>* Percentage</th><th>Quantity</th><th>Amount (USD)</th><th>Funds Status</th><th colspan="3">Distribution Flexfields</th><th>Delete</th></tr><tr><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>Special 1</th><th>Special 2</th><th>Special 3</th><th></th></tr></thead><tbody><tr><td>Office Supply</td><td>1010.114001.50.830007.00000.00000</td><td>10-31-2019</td><td>100</td><td>2</td><td>1,000.00</td><td>Not reserved</td><td></td><td></td><td></td><td>X</td></tr><tr><td colspan="5">Total</td><td>100</td><td>2</td><td>1,000.00</td><td colspan="3"></td></tr></tbody></table></div>	Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields			Delete								Special 1	Special 2	Special 3		Office Supply	1010.114001.50.830007.00000.00000	10-31-2019	100	2	1,000.00	Not reserved				X	Total					100	2	1,000.00			
Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields			Delete																																			
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Office Supply	1010.114001.50.830007.00000.00000	10-31-2019	100	2	1,000.00	Not reserved				X																																			
Total					100	2	1,000.00																																						
18	Click the <b>Save</b> button. <div><div>Edit Requisition: 1165</div><div>ShopCheck FundsManage ApprovalsView PDFSaveSubmit</div><div>Last Saved 10-31-2019 9:01 AM</div><div>Requisitioning BULucas County</div><div>* DescriptionMONITOR</div><div>* State Contract - If yes, please insert Contract NumberNo</div><div>State Contract Number</div><div>* Sole Source - If yes please attach proof of Sole SourceNo</div><div>* Resolution AttachedNo</div><div>* Will Services be performed on Lucas County property?Yes</div><div>* Does this purchase require the attachment of the LCIS Checklist?No</div><div>Requisition Lines</div><div>ActionsViewFormatFreezeDetachWrap</div><table><thead><tr><th>Line</th><th>Description</th><th>Category Name</th><th>* Quantity</th><th>UOM Name</th><th>* Price</th><th>Amount (USD)</th><th>Funds Status</th><th>Delete</th></tr></thead><tbody><tr><td>1</td><td>MONITOR</td><td>920</td><td>2</td><td>Each</td><td>500.00 USD</td><td>1,000.00</td><td>Not reserved</td><td>X</td></tr><tr><td colspan="6">Total</td><td>1,000.00</td><td colspan="2"></td></tr></tbody></table><div>Rows Selected 1Columns Hidden 8</div><div>Line 1: Details</div><div>Delivery</div><div><div>RequesterGLANVILLE, MICHELLE</div><div>Requested Delivery Date11-07-2019</div><div>Suggested Buyer</div><div>Deliver-to Location TypeInternal</div><div>* Deliver-to LocationMental Health Recovery Service</div><div>Deliver-to Address701 Adams Street, Suite 800, TOLEDO, OH 43604, UNITED STATES</div></div><div>Billing</div></div>	Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete	1	MONITOR	920	2	Each	500.00 USD	1,000.00	Not reserved	X	Total						1,000.00																			
Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete																																					
1	MONITOR	920	2	Each	500.00 USD	1,000.00	Not reserved	X																																					
Total						1,000.00																																							
18	Click the <b>Check Funds</b> button. <div><div>ShopCheck FundsManage ApprovalsView PDFSaveSubmit</div></div>																																												
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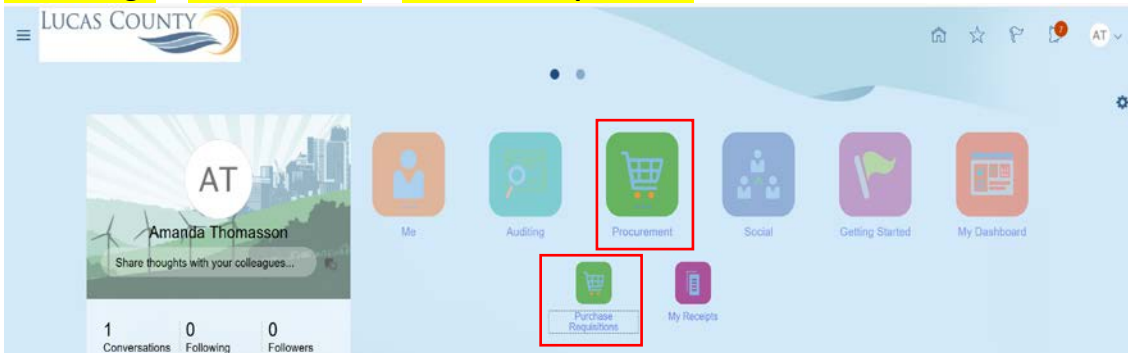
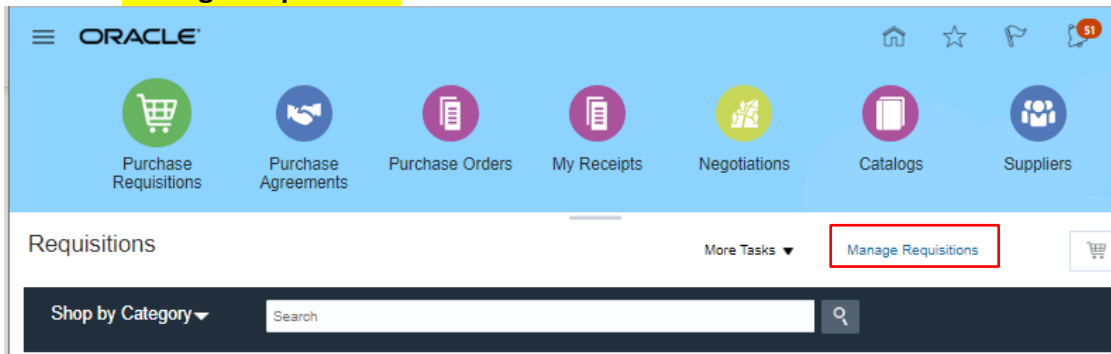


21	When all is completed, click the <b>Submit</b> button.
22	Click the <b>OK</b> button to acknowledge submission of the requisition.

## 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	<p>Log into Oracle.  <b>Home Page-&gt; Procurement -&gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>Manage Requisitions</b> link.</p> 
3	<p>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 <b>Incomplete</b> from the <b>Status</b> dropdown list, and click the <b>Search</b> button.</p>

Manage Requisitions

Search

Advanced

Manage Watchlist

Saved Search

Requisitions I Entered

Requisitioning BU

\*\* Entered By

THOMASSON, AMANDA

\*\* Requisition

Description

Created

Status

Incomplete

Requester

\*\* Supplier

Order

\*\* Item

Requisitions Requiring Attention

Search

Reset

Save

Search Results

Actions

View

Format

Freeze

Detach

Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order

4

Highlight the requisition that is to be deleted.

5

Click the **Actions** drop-down list, and select **Delete**.

Search Results

Actions

View

Format

Freeze

Detach

Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order

6

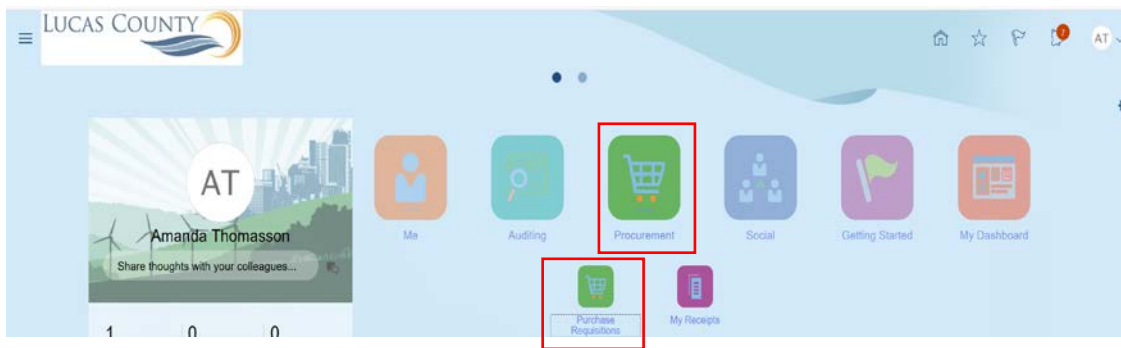
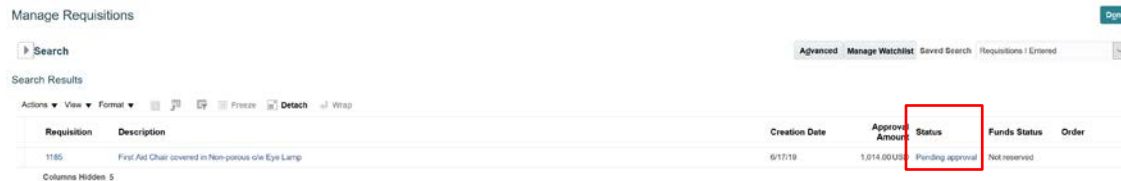
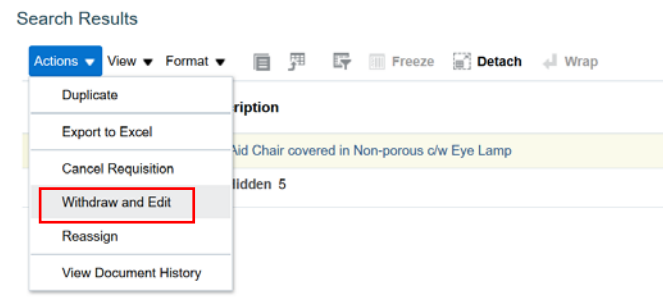
Click the **Yes** button to confirm the action.


61

## Edit Requisition

**Audience:** Requesters

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

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

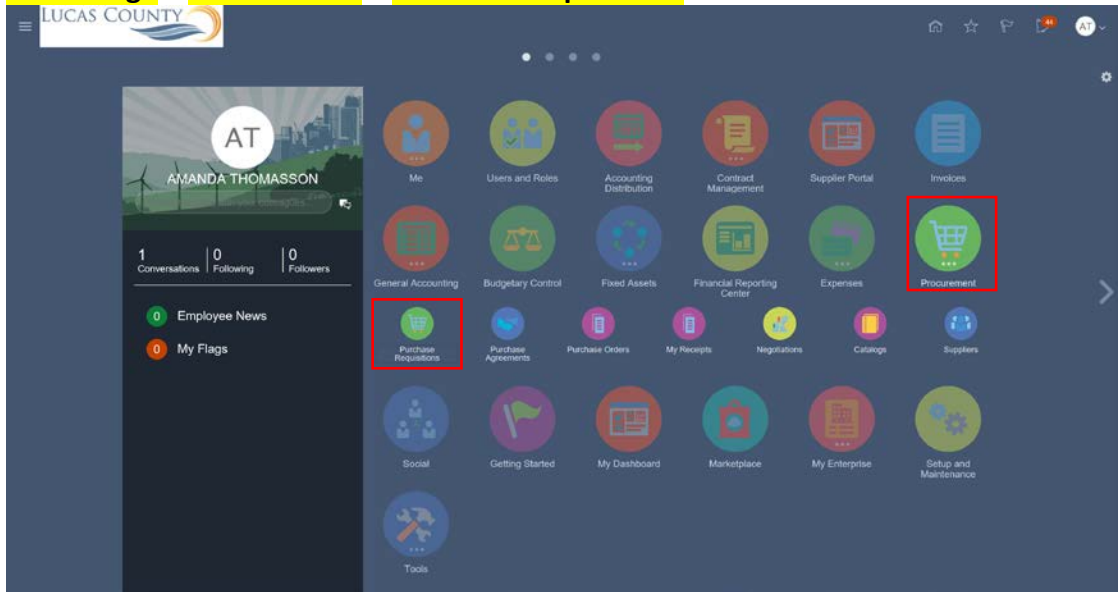
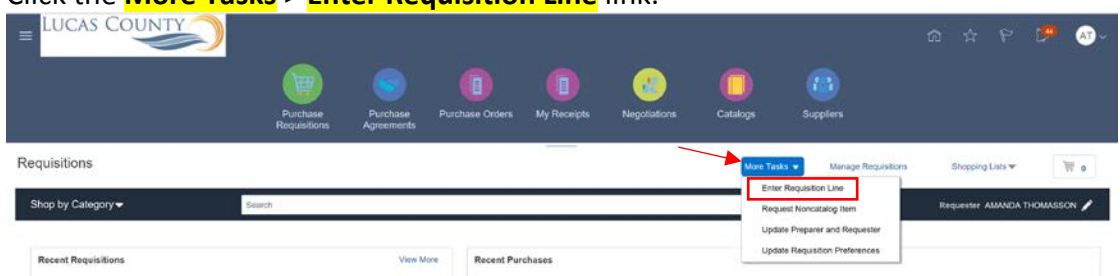
	<div>  <b>Warning</b> <span>×</span> </div> <p>This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.</p> <p>Do you want to continue?</p> <div> <input type="button" value="Yes"/> <input type="button" value="No"/> </div>
8	Click on the <b>Quantity</b> field and update with a new quantity.
9	Click the <b>Save</b> button.
10	Click the <b>Submit</b> button.
11	Click the <b>OK</b> 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	<p>Log into Oracle.  <b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p> 
3	<p>Click the <b>Line Type</b> list.</p>

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

- 11 Click **Advance** button to search for Category Number/Description

The screenshot shows the 'Enter Requisition Line' screen with a modal dialog titled 'Search and Select: Category Name'. The dialog has a 'Search' tab selected. The 'Category Name' field is empty, and the 'Description' field is also empty. The 'Advance' button is highlighted with a red box. The background shows the 'Enter Requisition Line' form with fields for Line Type, Item, Revision, Category Name, Quantity, UOM Name, Price, and Currency.

- 12 Use the **Does not equal**, to get a list of all Category Name/Description

The screenshot shows the 'Search and Select: Category Name' dialog box with the 'Basic' tab selected. The 'Category Name' field has the operator 'Does not equal' selected from a dropdown menu. The 'Description' field has the operator 'Starts with' selected. The 'Search' button is highlighted with a red box. The background shows the 'Enter Requisition Line' form.

- 13 Enter information into the **Description** or **Category** fields.

- 14 Click the **Search** button.

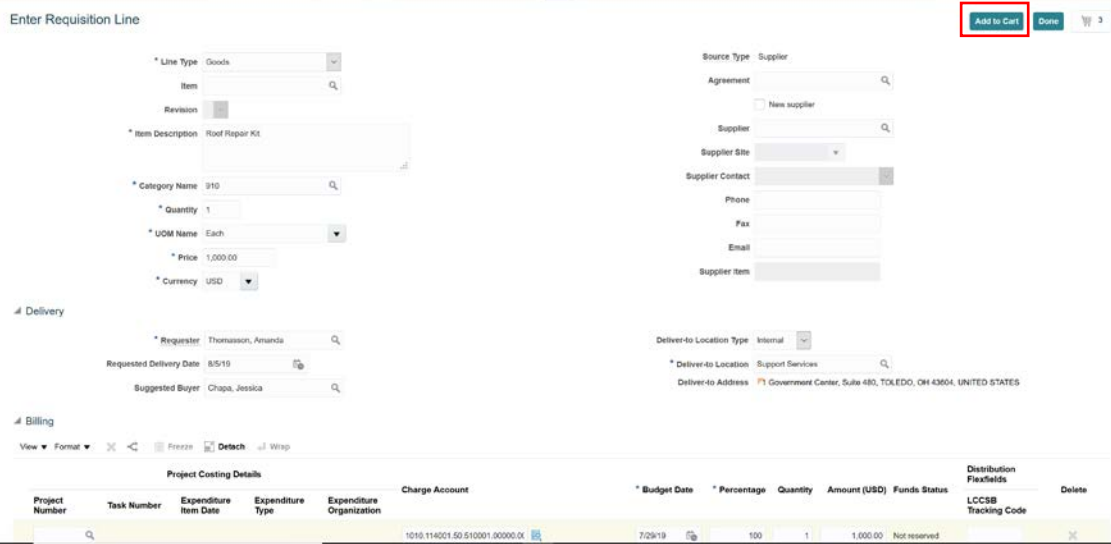
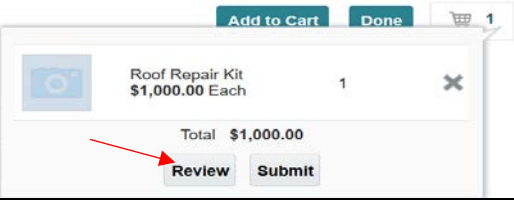
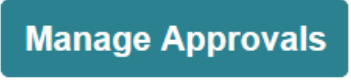
- 15 Make a selection from the search results list.

The screenshot shows the 'Search and Select: Category Name' dialog box with the search results list displayed. The first item, '005 ABRASIVES', is highlighted with a red box. The background shows the 'Enter Requisition Line' form.

Category Name	Description
005	ABRASIVES
010	ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES
015	ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES, CHE...
019	AGRICULTURAL CROPS AND GRAINS INCLUDING FRUITS, MELONS, NUTS, AND VEGETABLES
020	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
021	AGRICULTURAL EQUIPMENT, IMPLEMENTS, AND ACCESSORIES (SEE CLASS 022 FOR PARTS)
022	AGRICULTURAL EQUIPMENT AND IMPLEMENT PARTS
025	AIR COMPRESSORS AND ACCESSORIES
031	AIR CONDITIONING, HEATING, AND VENTILATING EQUIPMENT, PARTS AND ACCESSORIES (SE
035	AIRCRAFT AND AIRPORT EQUIPMENT, PARTS, AND SUPPLIES

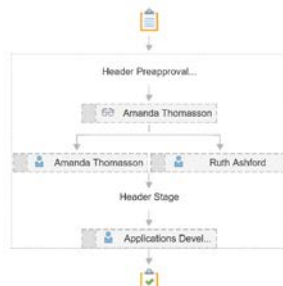


16	Click the <b>OK</b> button.
17	Click in the <b>Quantity</b> field.
18	Enter information into the <b>Quantity</b> field.
19	Click in the <b>UOM</b> field.
20	Enter information into the <b>UOM</b> field.
21	Click the <b>EA Quantity</b> Each list item.
22	Click in the <b>Price</b> field.
23	Enter information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

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



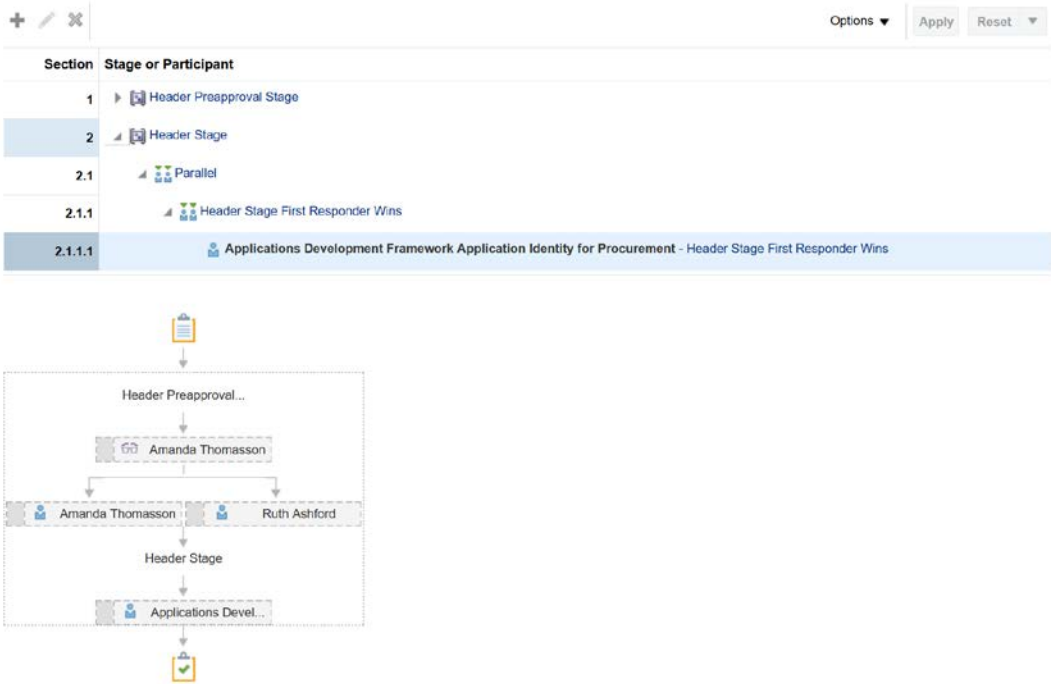
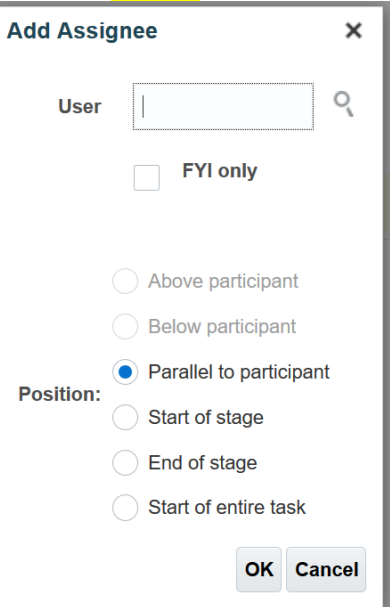
Adding additional approvers is allowed at certain stages. Drill down into the **'Header Stage'**.

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**.

	<p>Manage Approvals (Requisition 1195)</p> 
50	<p>Click the '+' sign to begin adding an approver. Click the <b>Search</b> icon for User in the <b>Add Assignee</b> window.</p> 
51	Select the <b>Approver User ID</b> .
52	Select a <b>Position</b> (Start of Stage) and click <b>Ok</b> .
53	Enter the first name of the <b>Approver</b> to be inserted.
54	Make a note of where the user was inserted into the approval path.
55	Enter the <b>Last Name of the Approver</b> to be inserted.

56	Click the <b>Apply</b> button.
57	Click the <b>Back</b> button.
58	Click the <b>Submit</b> button.
59	Click the <b>OK</b> button to confirm.

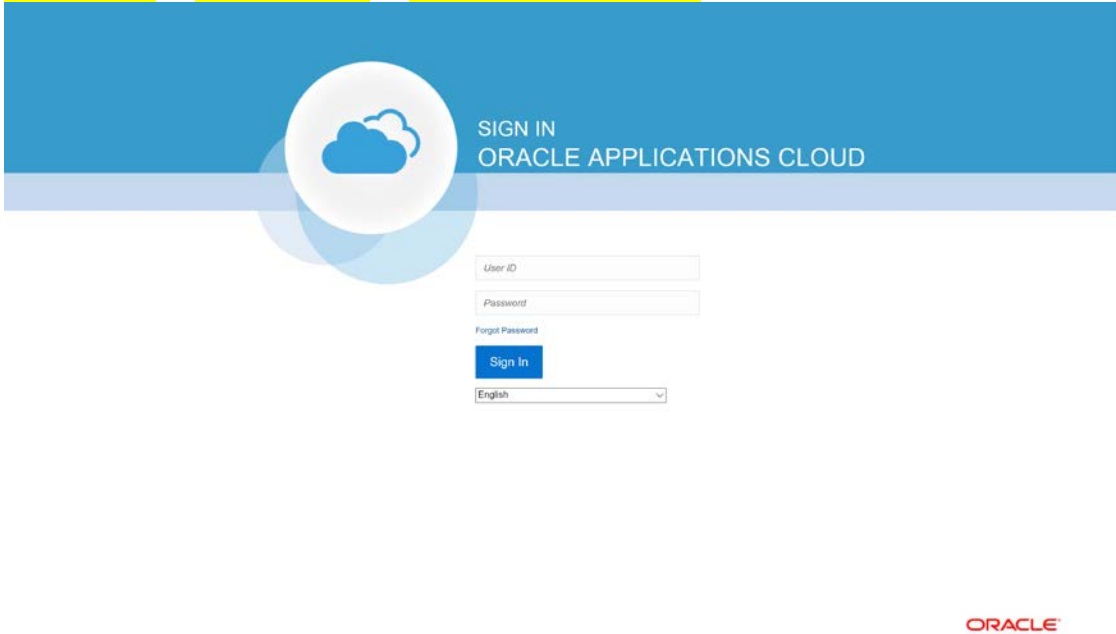
## Cancel Requisition

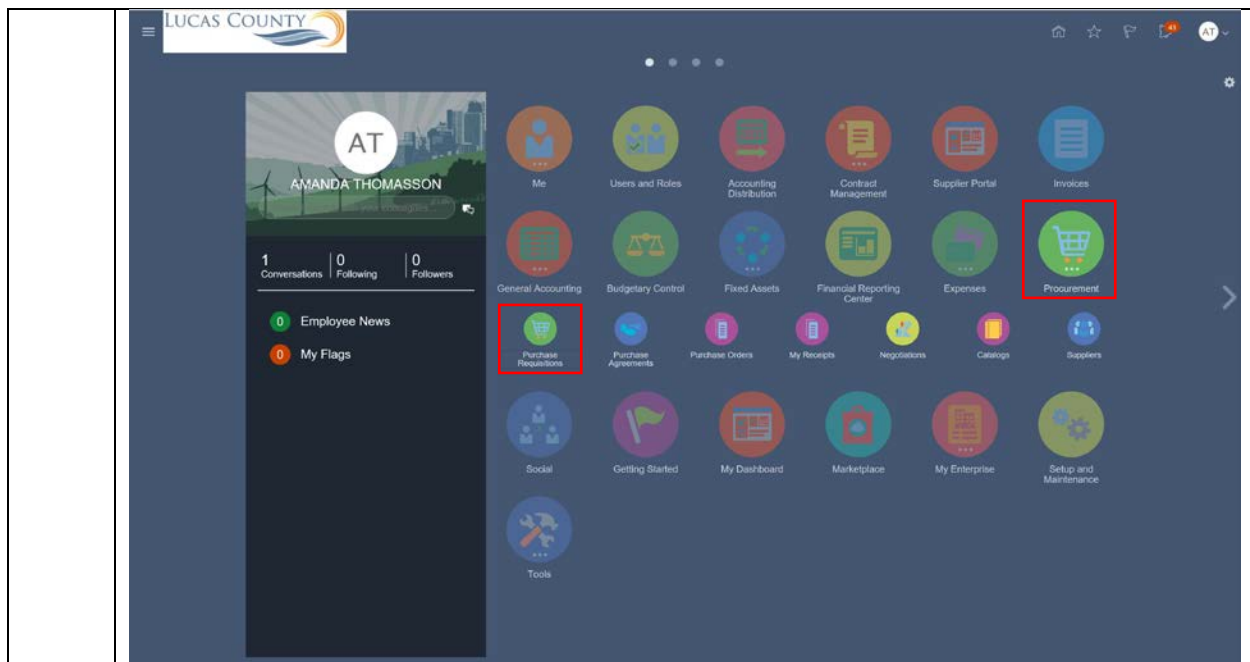
**Audience:** Requester

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

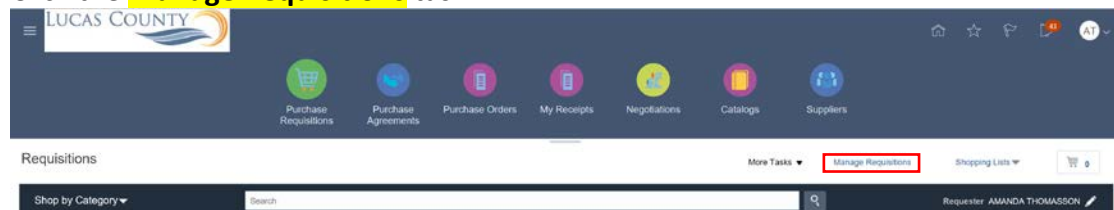
The purchase order contains the most up-to-date information. This job aid will assist you in canceling a requisition.

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.

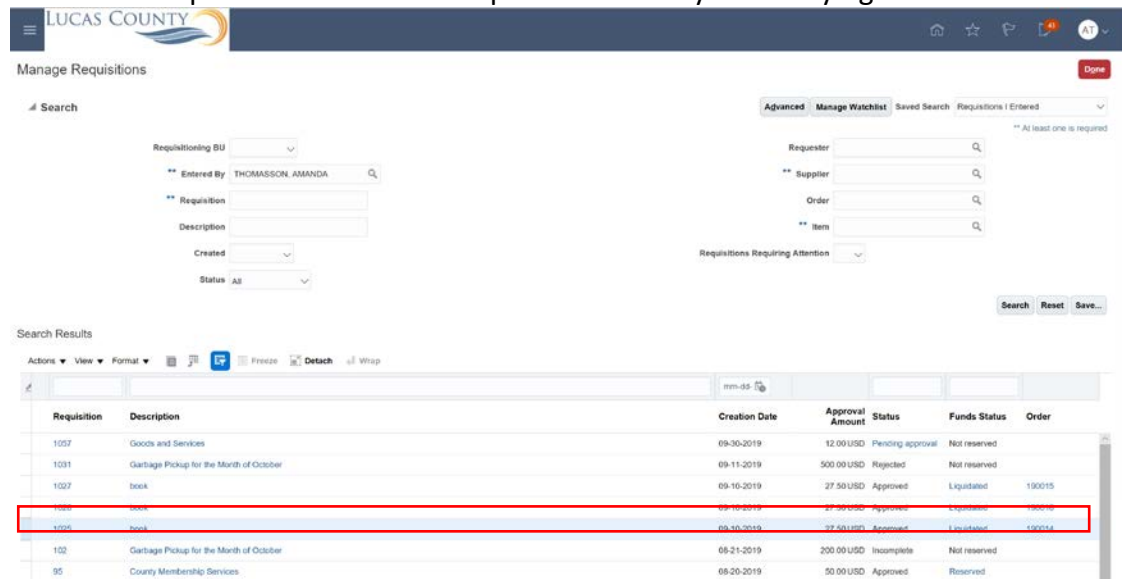
Step	Action
1	<p>Log into Oracle.  <b>Home Page -&gt; Procurement -&gt; Purchase Requisitions</b></p> 



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.

Manage Requisitions

Search

Requisitioning BU:

\*\* Entered By: THOMASSON, AMANDA

\*\* Requisition:

Description:

Created:

Status: All

Requester:

\*\* Supplier:

Order:

\*\* Item:

Requisitions Requiring Attention:

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1026	book	09-30-2019	12.00 USD	Pending approval	Not reserved	
1025	book	09-11-2019	500.00 USD	Rejected	Not reserved	
102	Garbage Pickup for the Month of October	09-10-2019	27.50 USD	Approved	Liquidated	190015
95	County Membership Services	09-10-2019	27.50 USD	Approved	Liquidated	190016
1025	book	09-10-2019	27.50 USD	Approved	Liquidated	190014
102	Garbage Pickup for the Month of October	08-21-2019	200.00 USD	Incomplete	Not reserved	
95	County Membership Services	08-20-2019	50.00 USD	Approved	Reserved	

5 Click the **Cancel Requisition** menu item.

Manage Requisitions

Search

Requisitioning BU:

\*\* Entered By: THOMASSON, AMANDA

\*\* Requisition:

Description:

Created:

Status: All

Requester:

\*\* Supplier:

Order:

\*\* Item:

Requisitions Requiring Attention:

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1026	book	09-30-2019	12.00 USD	Pending approval	Not reserved	
1025	book	09-11-2019	500.00 USD	Rejected	Not reserved	
102	Garbage Pickup for the Month of October	09-10-2019	27.50 USD	Approved	Liquidated	190015
95	County Membership Services	09-10-2019	27.50 USD	Approved	Liquidated	190016
1025	book	09-10-2019	27.50 USD	Approved	Liquidated	190014
102	Garbage Pickup for the Month of October	08-21-2019	200.00 USD	Incomplete	Not reserved	
95	County Membership Services	08-20-2019	50.00 USD	Approved	Reserved	



6 Enter information into the **Reason** field.

The screenshot shows the 'Manage Requisitions' interface. A 'Cancel Requisition' dialog box is open in the center. It has a title bar with a close button (X). Inside, there is a label '\* Reason' followed by a text input field containing 'Incorrect order'. Below the input field are two buttons: 'OK' (highlighted with a red box) and 'Cancel'. The background interface is dimmed, showing search filters and a table of requisitions.

7 Click the **OK** button.

8 Click the **OK** button for the confirmation message.

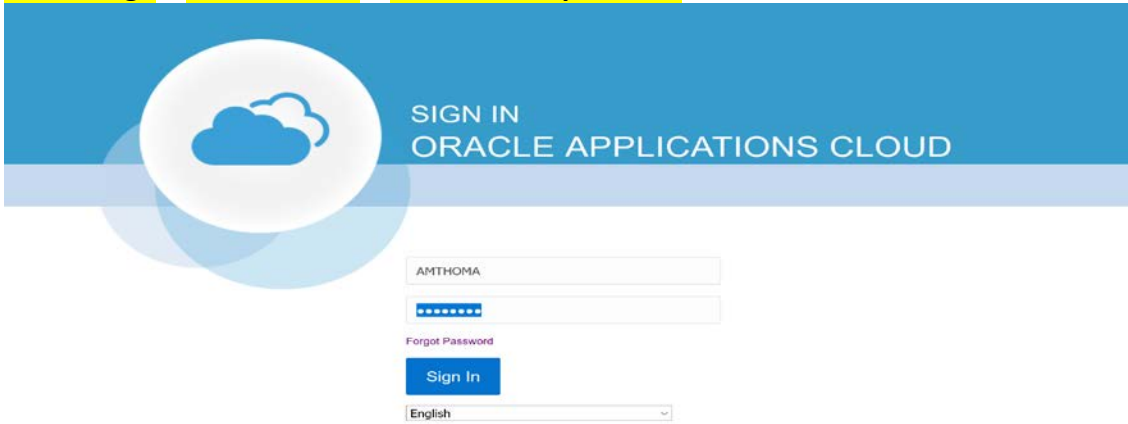
The screenshot shows the 'Manage Requisitions' interface after the first dialog. A 'Confirmation' dialog box is now open. It has a title bar with a close button (X). The message inside reads: 'The requisition lines were canceled or cancellation requests were submitted for the lines'. Below the message is an 'OK' button, which is highlighted with a red box. The background interface remains dimmed.

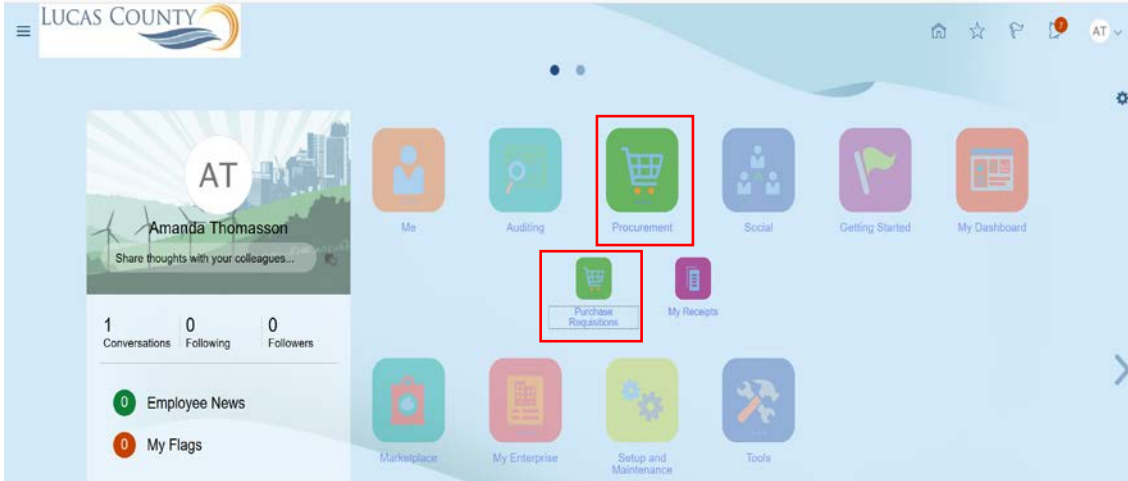
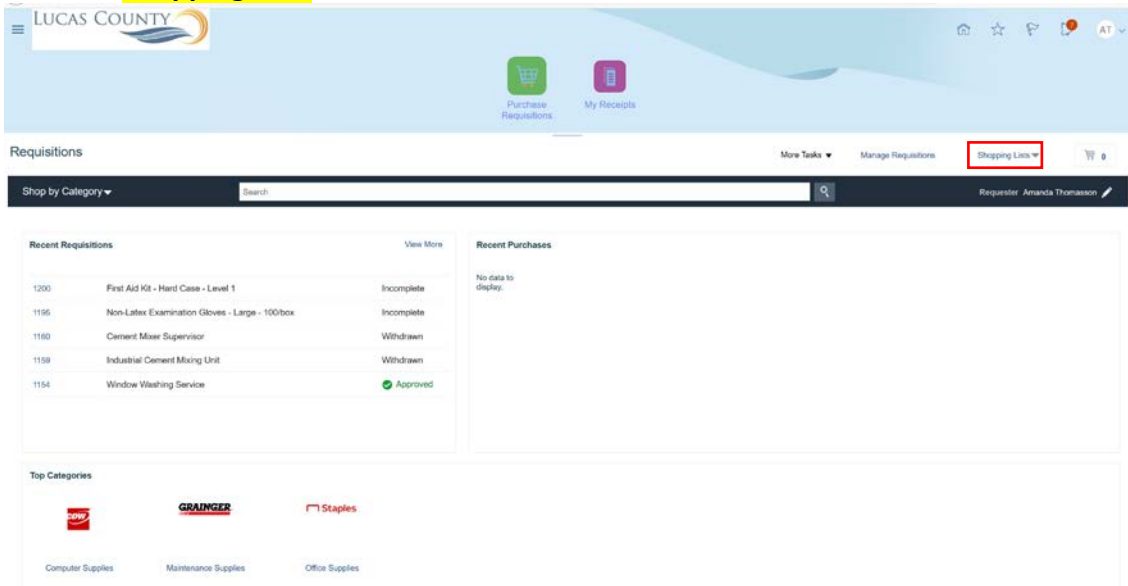

## Create Personal Shopping List as a Requester

**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	<p>Log into Oracle</p> <p><b>Home Page</b> &gt; <b>Procurement</b> &gt; <b>Purchase Requisitions</b></p> 

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

- 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.

Shop by Category ▼ Gloves Expand Search

Categories: OH & S SAFETY (8)

Price: \$ 0 - \$ 8.2 Go

Hide Filters

View ▾ Add to Cart Add to Shopping List Add to Compare

Description	Price (USD)	UOM	Quantity	Amount
Non-Latex Examination Gloves - Large - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - Medium - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - Small - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - X-Large - 100/box	8.20	Each	1	8.20 USD
NITRILE BLACK GLOVE PF	0.00	Each	1	0.00 USD
Non-Latex Examination Gloves - Medium - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - Small - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - X-Large - 100/box	8.20	Each	1	8.20 USD
NITRILE BLACK GLOVE PF	0.00	Each	1	0.00 USD
Non-Latex Examination Gloves - Large - 100/box	8.20	Each	1	8.20 USD

Expand Search | Request Noncatalog Item

- 9 Click the **Add to Shopping List** menu.

View ▾ Add to Cart **Add to Shopping List** Add to Compare

**Description**

Non-Latex Examination Gloves - Large - 100/box

- 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.

Requisitions

More Tasks Manage Requisitions Shopping Lists

Shop by Category ▼ Search

Recent Requisitions View More Recent Purchases


12/20 First Aid Kit - Hard Case - Level 1 Incomplete No data to display.

First Aid

Create Shopping List

- 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.

Shopping Lists

Done 

Manage My Shopping Lists




4 My Shopping Lists


1 First Aid

4 Public Shopping Lists

First Aid Supplies - Countywide

First Aid (3 Items)

Search Shopping Lists   

View 

**Add to Cart**

Add to Another Shopping List

Remove

Description	Price (USD)	UOM	Quantity	Amount
Non-Latex Examination Gloves - Medium - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - Small - 100/box	8.20	Each	1	8.20 USD
Non-Latex Examination Gloves - X-Large - 100/box	8.20	Each	1	8.20 USD

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.

Edit Requisition: 1201

[Shop](#) [Check Funds](#) [Manage Approvals](#) [View PDF](#) [Save](#) [Submit](#)

Requisitioning BU Lucas County


\* Description Non-Latex Examination Gloves - Medium - 100/box


Justification

Requisition Amount 24.60 USD


Approval Amount 24.60 USD


Funds Status Not reserved


Attachments None 

\* 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  If yes, please attach a current Bureau of Workers Compensation Policy and Insurance Certificate of Liability

\* Will Services be performed on Lucas County property? No 

Requisition Lines

Actions  View  Format     Freeze  Detach  Wrap

Line	Description	Category Name	* Quantity	UOM Name	Price	Amount (USD)	Funds Status	Delete
1	Non-Latex Examination Gloves - Medium - 100/box	345	1	Each	8.20 USD	8.20	Not reserved	
2	Non-Latex Examination Gloves - Small - 100/box	345	1	Each	8.20 USD	8.20	Not reserved	
3	Non-Latex Examination Gloves - X-Large - 100/box	345	1	Each	8.20 USD	8.20	Not reserved	
Total						24.60		


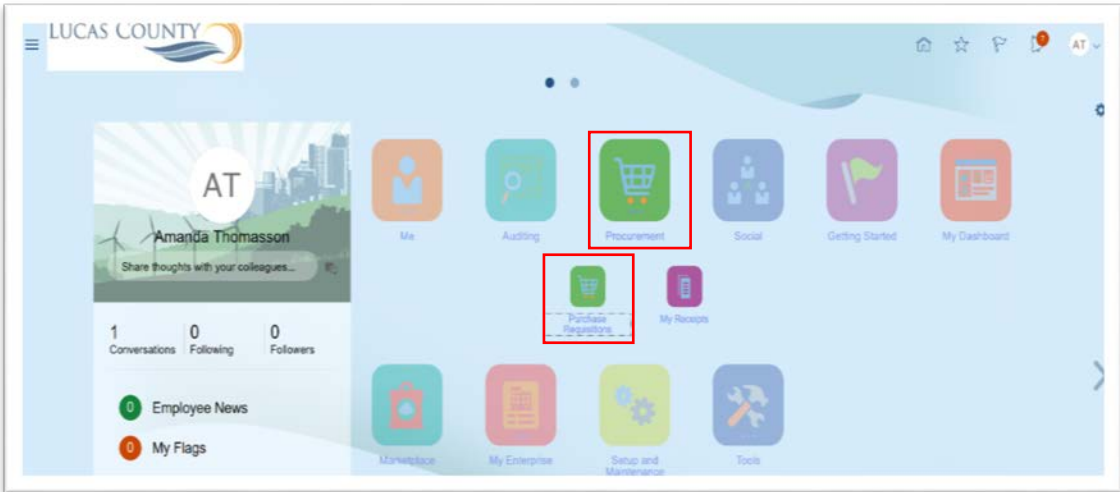
Rows Selected 1 Columns Hidden 8

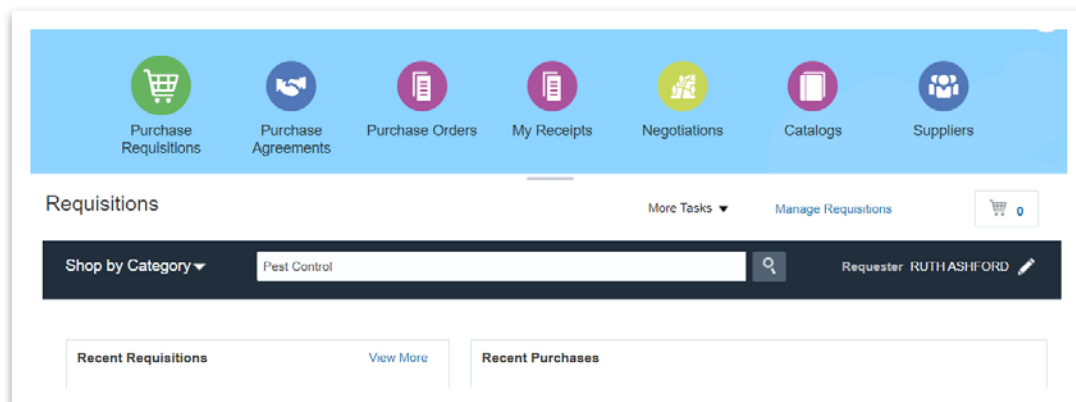
## Compare Items

**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	<p>Log into Oracle <b>Home Page</b> &gt; <b>Procurement</b> &gt; <b>Purchase Requisitions</b></p>  
2	<p>Search for the first item. Click in the <b>Search</b> field and type description of an item for comparison.</p>







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.







Description	Pri (U)	UO	Quantity	Amount
Pest Control Services -Monthly -Vehicle Maintenance 644 Stat...	19.1	E...	1	19.00 USD
Pest Control Services -Emergency Service -Solid Waste Mana...	24.1	E...	1	24.00 USD
Pest Control Services -Bi-Monthly -Sixth District Court of Appea...	29.1	E...	1	29.00 USD
Pest Control Services -Emergency Service -Sixth District Court ...	29.1	E...	1	29.00 USD
Pest Control Services -Weekly -Corrections Center 1622 Spielb...	64.1	E...	1	64.00 USD
Pest Control Services -Emergency Service -Corrections Center...	256	E...	1	256.00 USD
Pest Control Services -Monthly -Family Court Center 429 Michi...	39.1	E...	1	39.00 USD
Pest Control Services -Bi-Monthly - Common Pleas Courthous...	59.1	E...	1	59.00 USD
Pest Control Services -Emergency Service -Common Pleas Co...	59.1	E...	1	59.00 USD


- 5 The **Compare Products** banner displays in the Search Results window, awaiting another item to compare.

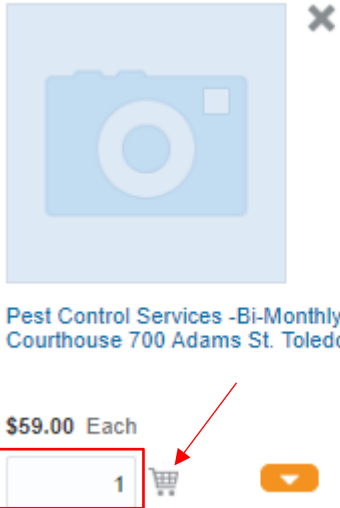
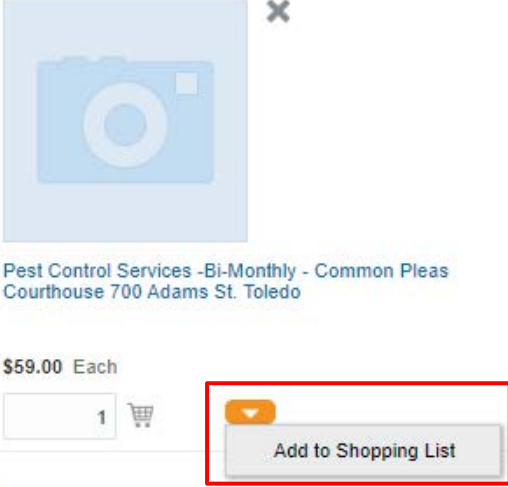
	<div><div><div>Categories</div><div>Brand</div><div>Price<div><div></div><div>19</div><div>256</div></div><div>\$ 19 - \$ 256 Go</div></div></div><div><div>Hide Filters</div><div>View </div><div>Add to Cart</div><div>Add to Shopping List</div><div>Add to Compare</div></div><table><thead><tr><th>Description</th><th>Pri (U: UC</th><th>Quantity</th><th>Amount</th></tr></thead><tbody><tr><td>Pest Control Services -Bi-Monthly - Common Pleas Courthouse ...</td><td>59. E..</td><td>1</td><td>59.00 USD</td></tr><tr><td>Pest Control Services -Emergency Service -Common Pleas Co...</td><td>59. E..</td><td>1</td><td>59.00 USD</td></tr><tr><td>Pest Control Services -Monthly -Office Complex 701 Adams St. ...</td><td>49. E..</td><td>1</td><td>49.00 USD</td></tr><tr><td>Pest Control Services -Emergency Service -Office Complex 701...</td><td>196 E..</td><td>1</td><td>196.00 USD</td></tr><tr><td>Pest Control Services -Monthly -Conference &amp; Learning Center ...</td><td>24. E..</td><td>1</td><td>24.00 USD</td></tr><tr><td>Pest Control Services -Emergency Service -Conference &amp; Lear...</td><td>75. E..</td><td>1</td><td>75.00 USD</td></tr><tr><td>Pest Control Services -Monthly -Work Release 1111 Madison Ave. ...</td><td>24. E..</td><td>1</td><td>24.00 USD</td></tr></tbody></table><div><div>Compare Products</div><div></div><div>Pest Control Serv...</div></div></div>	Description	Pri (U: UC	Quantity	Amount	Pest Control Services -Bi-Monthly - Common Pleas Courthouse ...	59. E..	1	59.00 USD	Pest Control Services -Emergency Service -Common Pleas Co...	59. E..	1	59.00 USD	Pest Control Services -Monthly -Office Complex 701 Adams St. ...	49. E..	1	49.00 USD	Pest Control Services -Emergency Service -Office Complex 701...	196 E..	1	196.00 USD	Pest Control Services -Monthly -Conference & Learning Center ...	24. E..	1	24.00 USD	Pest Control Services -Emergency Service -Conference & Lear...	75. E..	1	75.00 USD	Pest Control Services -Monthly -Work Release 1111 Madison Ave. ...	24. E..	1	24.00 USD	<p>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.</p>
Description	Pri (U: UC	Quantity	Amount																															
Pest Control Services -Bi-Monthly - Common Pleas Courthouse ...	59. E..	1	59.00 USD																															
Pest Control Services -Emergency Service -Common Pleas Co...	59. E..	1	59.00 USD																															
Pest Control Services -Monthly -Office Complex 701 Adams St. ...	49. E..	1	49.00 USD																															
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Pest Control Services -Monthly -Work Release 1111 Madison Ave. ...	24. E..	1	24.00 USD																															
6	<p>Click the <b>Add to Compare</b> button.</p> <div><div>Add to Cart</div><div>Add to Shopping List</div><div>Add to Compare</div></div> <p>The icons for compared items display side by side in the <b>Compare Products</b> banner.</p> <div><div>Compare Products</div><div></div><div></div><div>Pest Control Serv...</div><div>Pest Control Serv...</div><div>Compare</div><div>Clear</div></div>																																	
7	<p>Click the <b>Compare</b> 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). <b>Note:</b> Not all comparison information may be available.</p>																																	

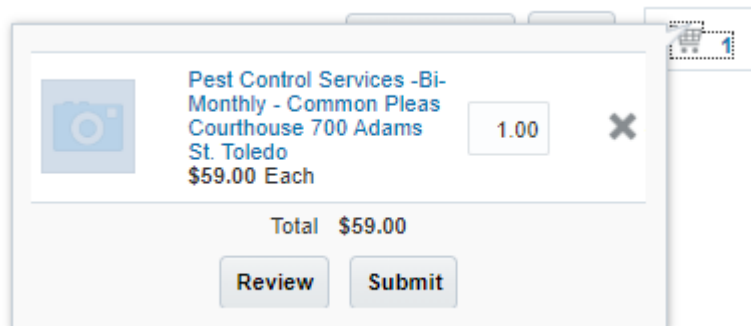


## Compare Products

		
	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
	<input type="text" value="1"/>  	<input type="text" value="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.

	 <p>Pest Control Services -Bi-Monthly - Common Pleas Courthouse 700 Adams St. Toledo</p> <p>\$59.00 Each</p> <p>1</p> <p>Note: Alternatively, you can use the dropdown arrow to add the item to a Shopping List if desired.</p>  <p>Pest Control Services -Bi-Monthly - Common Pleas Courthouse 700 Adams St. Toledo</p> <p>\$59.00 Each</p> <p>1</p> <p>Add to Shopping List</p>
9	Click the <b>Shopping Cart</b> icon within the requisition window to see a quick view of details.
10	Please click the <b>Review</b> button to provide additional required details.



11	<p>Provide a required <b>Description</b> for your requisition. A default is provided by default.</p> <p>Edit Requisition: 1047</p> <div style="text-align: right;">Requisitioning BU Lucas County</div> <div style="border: 1px solid red; padding: 5px; margin: 10px auto; width: fit-content;">         * Description supplies       </div> <div style="margin-top: 10px;">         * State Contract - If yes, please insert Contract Number <span style="border: 1px solid gray; padding: 2px 10px;">No</span> ▼       </div>
12	<p>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.</p> <p>If on <b>State Contract</b>, please select <b>Yes</b> from the dropdown arrow, then note the State Contract Number.</p> <p>If item is on record as a <b>Sole Source</b>, please indicate yes, and select <b>Yes</b> to Resolution Attached, then ensure you provide proof of Sole Source as an attachment to the requisition.</p> <p>If a <b>Service</b> is being requisitioned that will <b>be performed on Lucas County property</b>, please select <b>Yes</b> and then please attach a current Bureau of Workers Compensation Policy and Insurance Certificate of Liability.</p> <p>For this example, select <b>No</b> for the following fields, indicating no attachments would be required for justification of those criteria.</p> <div style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: 80%; background-color: #f9f9f9;"> <div style="margin-bottom: 10px;">           * State Contract - If yes, please insert Contract Number <span style="border: 1px solid gray; padding: 2px 10px;">No</span> ▼           <div style="margin-top: 5px;">             State Contract Number <span style="border: 1px solid gray; display: inline-block; width: 150px; height: 20px;"></span> </div> </div> <div style="margin-bottom: 10px;">           * Sole Source - If yes please attach proof of Sole Source <span style="border: 1px solid gray; padding: 2px 10px;">No</span> ▼         </div> <div style="margin-bottom: 10px;">           * Resolution Attached <span style="border: 1px solid gray; padding: 2px 10px;">No</span> ▼         </div> <div>           * Will Services be performed on Lucas County property? <span style="border: 1px solid gray; padding: 2px 10px;">No</span> ▼         </div> </div>
	<p>Review Requisition lines. The quantities can be edited by entering another quantity directly into the <b>Quantity</b> field, and lines can be deleted at this point using the <b>X</b> indicated at the end of the lines.</p>

	<div>Requisition Lines</div> <div> <div> <div>Actions</div> <div>View</div> <div>Format</div> <div>Freeze</div> <div>Detach</div> <div>Wrap</div> </div> <table> <tr> <th>Line</th><th>Description</th><th>Category Name</th><th>* Quantity</th><th>UOM Name</th><th>* Price</th><th>Amount (USD)</th><th>Funds Status</th><th>Delete</th></tr> <tr> <td>1</td><td>Pest Control Service 675</td><td></td><td>1</td><td>Each</td><td>59.00 USD</td><td>59.00</td><td>Not reserved</td><td>X</td></tr> <tr> <td colspan="6">Total</td><td>59.00</td><td colspan="2"></td></tr> </table> <div>Rows Selected 1 Columns Hidden 8</div> </div>	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	X	Total						59.00		
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	X																				
Total						59.00																						

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

+

X

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

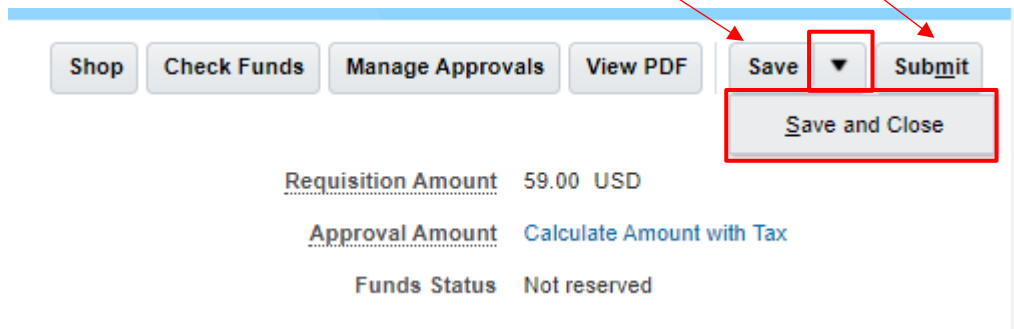
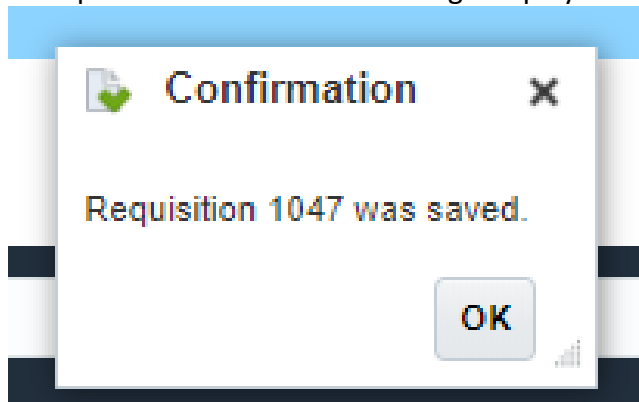

Attachments Liability Cert

+

X

10

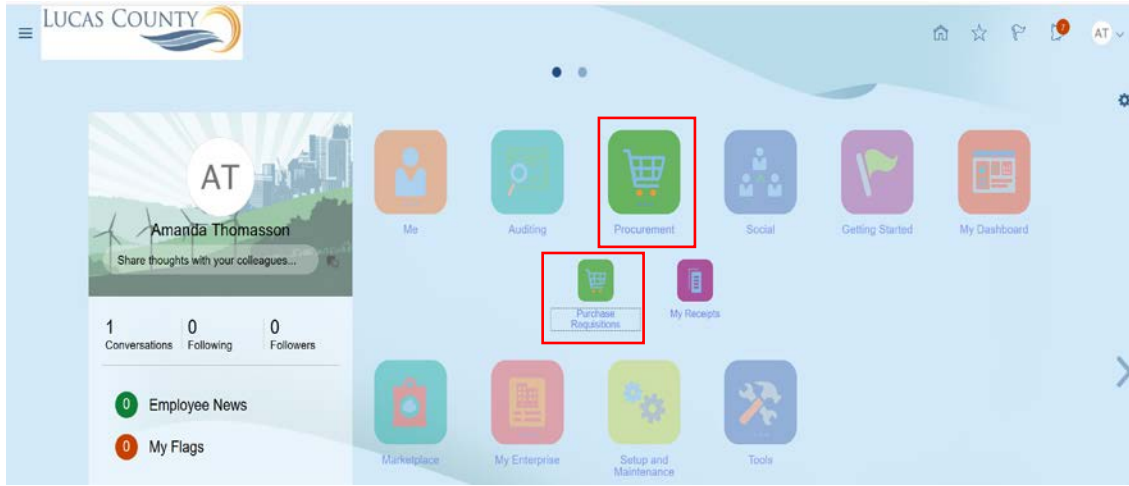
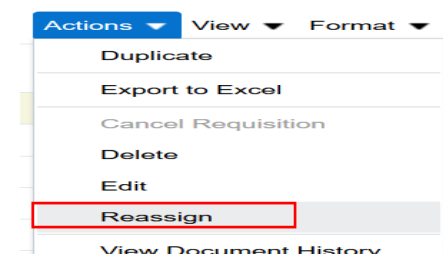
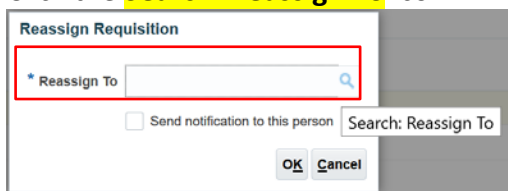
If you wish to submit the requisition at this time, you can click the **Submit** button. If you wish to continue building the requisition at this time, you can click the **Save** button.

	<p>If you wish to save your progress now and finish the requisition at a later time, then click the <b>Save and Close</b> button. For this example, we will save and close.</p>  <p>Shop Check Funds Manage Approvals View PDF Save Submit</p> <p>Save and Close</p> <p>Requisition Amount 59.00 USD</p> <p>Approval Amount Calculate Amount with Tax</p> <p>Funds Status Not reserved</p>
11	<p>A Requisition Confirmation message displays.</p>  <p>Click the <b>OK</b> button to acknowledge that the requisition was saved.</p>
12	<p>If comparison of items is concluded, click the <b>Clear</b> button to close the Comparison. Otherwise, you could continue to compare items using the <b>Compare</b> button.</p> 

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

Search and Select: Entered By

Search

Advanced

\*\* At least one is required

\*\* Name Ashford

\*\* Department

\*\* Job

\*\* Email

\*\* Phone

Search

Reset

Name	Department	Job	Email	Phone
Ashford, Ruth	Support Services		rashford@co.lucas.oh.us	944-3255
ASHFORD, RUTH	Support Services	Director 1	ashruthd@gmail.com	944-3255

OK

Cancel

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.

### Reassign Requisition

\* Reassign To Ashford, Ruth

☒

Send notification to this person

OK

Cancel

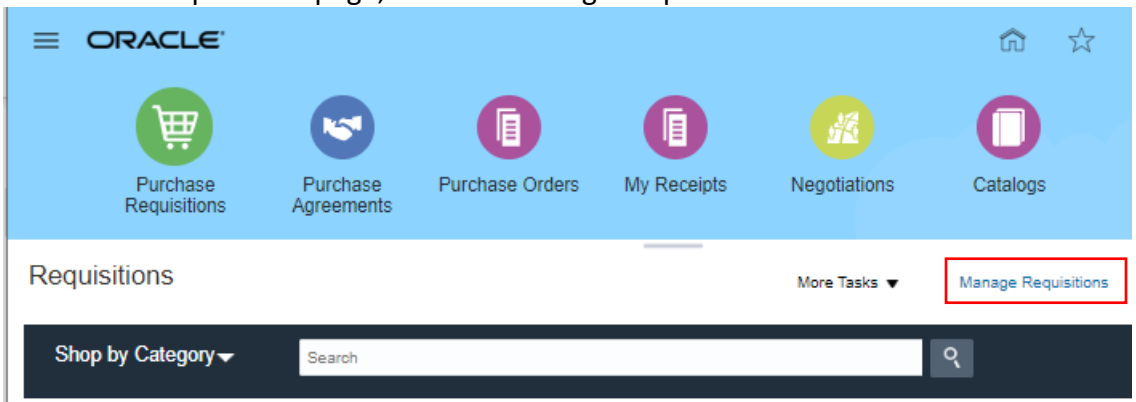
10 Confirmation is displayed.

11 Click the **OK** button to confirm.

## Managing Requisitions

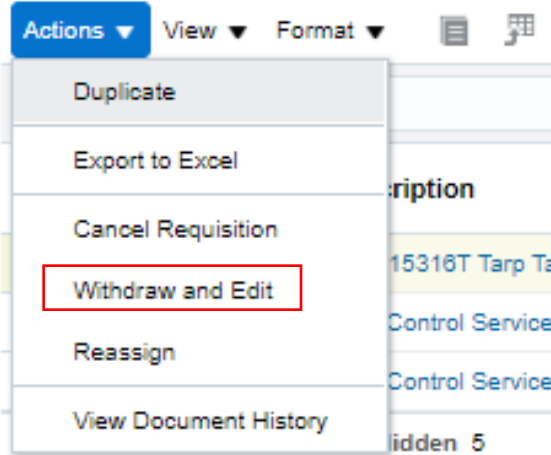
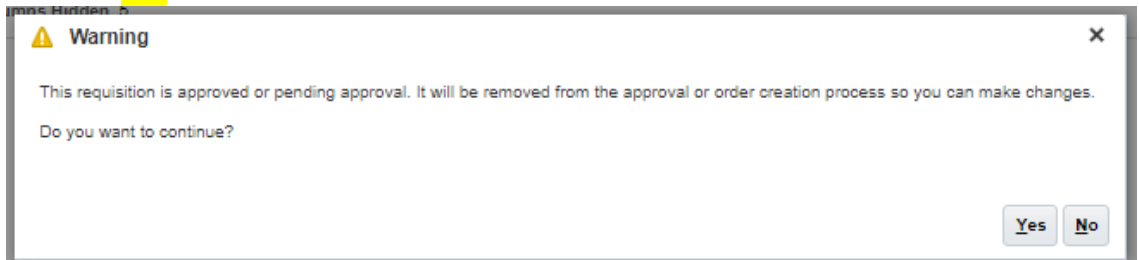
**Audience:** Requester

**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	<p>Log into Oracle <b>Home Page -&gt; Procurement -&gt; Purchase Requisitions</b></p> 
2	<p>Within the Requisitions page, click the Manage Requisitions link.</p>  <p><b>NOTE:</b> 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</p>





	<p>Search Results</p> 
7	<p>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 <b>Yes</b> button.</p> 
8	<p>To modify the details, click in the editable fields and modify accordingly. For this example, you will update the quantity. Click on the <b>Quantity</b> field and adjust the quantity.</p>

Edit Requisition: 1164

Shop
Check Funds
Manage Approvals
View PDF
Save
Submit

Requisitioning BU Lucas County

\* Description TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. Finished Size 9 ft. 6 in. x 11 ft. 6 in. Tarp Finished Length 11 ft. 6 in. Tarp Finished Width 9

\* 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

\* Does this purchase require the attachment of the LCIS Checklist? No

Requisition Lines

Actions View Format Freeze Detach Wrap

Line	Description	Category Name	* Quantity	* Price	Amount (USD)	Funds Status	Delete
1	TK1015316T Tarp Tarp Material C 560			103.47 USD	613.88	Not reserved	X
Total					613.88		

Rows Selected 1 Columns Hidden 8

Line 1: Details

Delivery

Requester THOMASSON, AMANDA

Requested Delivery Date 11-05-2019

Suggested Buyer

Deliver-to Location Type Internal

\* Deliver-to Location Support Services

Deliver-to Address 1 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES

Billing

View Format Freeze Detach Wrap

Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution
							Special 1 Special 2

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.

Confirmation
X

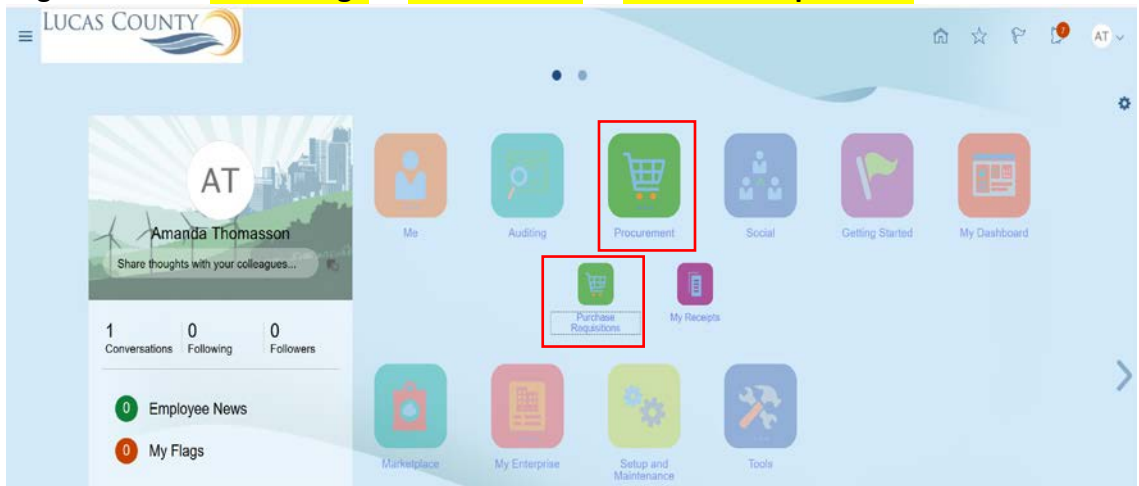

Requisition 1164 was submitted.

View PDF OK

## 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	<p>Log into Oracle. <b>Home Page</b> -&gt; <b>Procurement</b> -&gt; <b>Purchase Requisitions</b></p> 
2	<p>Click the <b>Notifications</b> (Bell icon) at the top right of the page.</p> 
3	Select <b>Notification: Action Required Approve Requisition.</b>
4	Once you have reviewed the requisition, click the <b>Approve</b> button.

## Requisitions Approval from Email

**Audience:** Approver

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

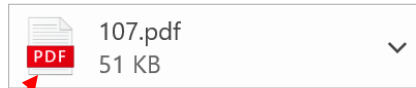
Step	Action		
1	Log into your Email. Select and open the email notification request for approval.		
2	<p>View details in the email.</p> <p>Action Required: Approve Requisition 107</p> <p>MR Michael Rath &lt;eieb-dev1.fa.sender@workflow.mail.us6.oraclecloud.com&gt; To: Lucascounty1@outlook.com</p> <p>107.pdf 51 KB</p> <p>Requisition Approval <b>\$19.00</b> <b>Rath, Michael</b> Pest Control Services -Monthly -Vehicle Maintenance 644 State St.</p> <p>Approve Reject Request Info</p> <p>Requisition <a href="#">107</a></p> <p><b>Lines</b></p> <table> <tr> <td>Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo</td> <td>\$19.00</td> </tr> </table> <p>1 x \$19.00 Charge Account: 1010.114001.50.630007.00000.00000</p> <p><b>Approval History</b></p> <p>DIANE ROBINSON</p> <p>Applications Development Framework Application Identity for Procurement</p> <p>Assigned to AMANDA THOMASSON 8/22/19 8:15 AM</p> <p>Assigned to RUTH ASHFORD 8/22/19 8:15 AM</p> <p>Submitted by Michael Rath 8/22/19 8:15 AM</p> <p>107.pdf</p> <p>Approve Reject Request Info</p>	Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo	\$19.00
Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo	\$19.00		

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

## Action Required: Approve Requisition 107



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



### 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.



Requisition 107 (19 USD)

Report Date 08/22/2019 12:15 PM  
Page GMT+00:00  
1 of 1

Requisitioning BU Lucas County  
Entered By Michael Rath  
Status Pending approval  
Description Pest Control Services -  
Monthly -Vehicle  
Maintenance 644 State St.  
Toledo  
Emergency Requisition No  
Requisition Amount 19 USD  
Approval Amount 19 USD  
Procurement Card  
Justification  
Funds Status Not reserved

Lines									
Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status
1		Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo	675	1	Each	19.00 USD	19	Pending approval	Not reserved

Requester Michael Rath  
Urgent No  
Requested Delivery Date 08/29/2019  
Supplier Action Pest Control, Inc.  
New Supplier No  
Supplier Site MAIN  
Supplier Contact  
Contact Phone  
Supplier Item  
Note to Supplier  
Note to Receiver  
Destination Type Expense  
Subinventory  
Note to Buyer

Distributions						
Distribution	Charge Account	Budget Date	Percentage	Quantity	Amount (USD)	Funds Status
1	1010.114001.50.630007.0 0000.00000	8/22/19	100	1	19	Not reserved

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.



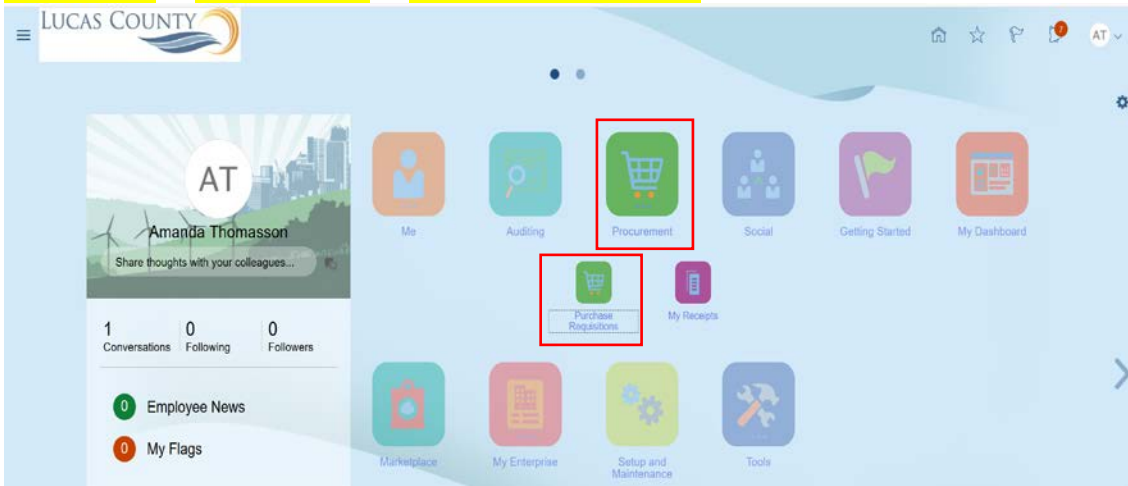

Note: **Approve** will allow the requisition to source. **Request Info** sends back to the Requisitioner and restarts workflow approvals. **Reject** stops the workflow and the requisition does not proceed. All options will provide a notification of the status to the Requisitioner.

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



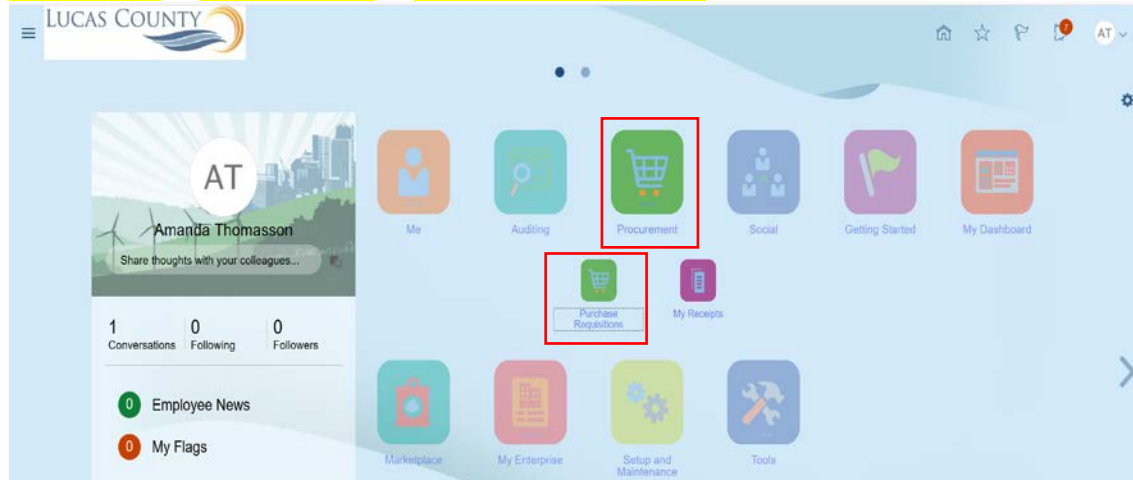
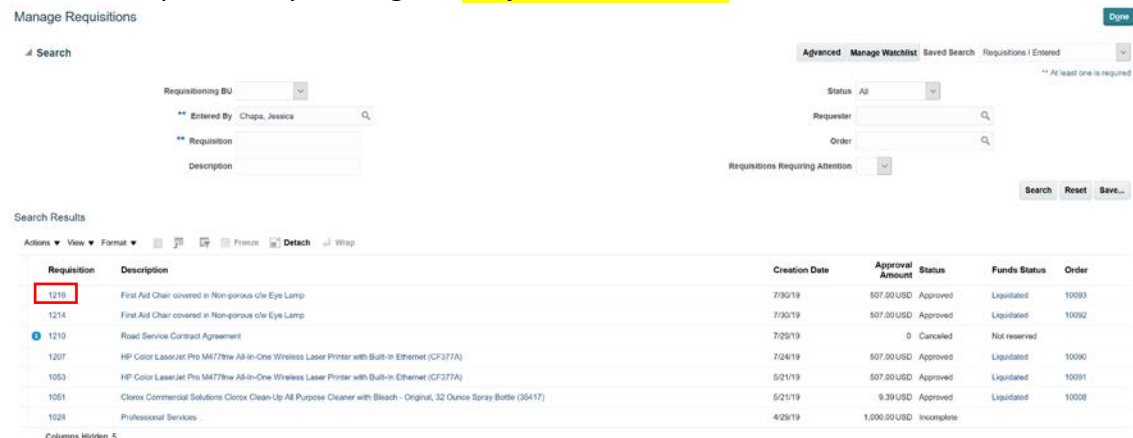
			
4	<p>Review the details of the requisition. If any justifications were attached, those can be reviewed at this time.</p> <p>Approve Requisition 1164 <span>Actions ▾</span> <span>Approve</span> <span>Reject</span></p> <div data-bbox="375 783 1003 921"> <p>Requisition Approval</p> <p><b>\$613.88</b></p> <p><b>THOMASSON, AMANDA</b></p> <p>TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. F</p> </div> <p>Requisition <a href="#">1164</a></p> <p><b>Lines</b></p> <table border="1"> <tr> <td>TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. Finished Size 9 ft. 6 In. x 11 ft. 6 In. Tarp Finished Length 11 ft. 6 In. Tarp Finished Width 9 ft. 6 In. Tarp Seam Finish Double Stitched Tarp Resistant Features Flame Resis</td> <td>\$613.88</td> </tr> </table> <p>4 x \$153.47 Charge Account: 1010.114001.50.630007.00000.00000</p> <p><b>Approval History</b></p> <ul style="list-style-type: none"> <li><input type="radio"/> Applications Development Framework Application Identity for Procurement</li> <li><input type="radio"/> Applications Development Framework Application Identity for Procurement</li> <li><input checked="" type="radio"/> Assigned to RUTH ASHFORD <span>10-29-2019 12:54 PM</span></li> <li><input type="radio"/> Submitted by AMANDA THOMASSON <span>10-29-2019 12:54 PM</span></li> </ul> <p><a href="#">1164.pdf</a></p>	TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. Finished Size 9 ft. 6 In. x 11 ft. 6 In. Tarp Finished Length 11 ft. 6 In. Tarp Finished Width 9 ft. 6 In. Tarp Seam Finish Double Stitched Tarp Resistant Features Flame Resis	\$613.88
TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. Finished Size 9 ft. 6 In. x 11 ft. 6 In. Tarp Finished Length 11 ft. 6 In. Tarp Finished Width 9 ft. 6 In. Tarp Seam Finish Double Stitched Tarp Resistant Features Flame Resis	\$613.88		
5	<p>Actions are listed in the Actions dropdown for this requisition. For this example, select no actions, but click the <b>Reject</b> button.</p>		

	<div> <div> <div>Actions ▾</div> <div>Approve</div> <div>Reject</div> </div> <div> <div>Request Information</div> <div>Delegate</div> <div>Reassign</div> <div>Escalate</div> <div>Suspend</div> <div>Withdraw</div> <div>Skip Current Assignment</div> <div>Add Comments</div> <div>Add Attachment</div> </div> </div>
6	<p>You will be prompted to enter rejection comments. You can also drag any files or click to add a file attachment, when required.</p> <div> <div> <div>Lines</div> <div> <div>TK1015316T Tarp Tarp Material Cotton Canvas Cut Size</div> <div>10 x 12 ft. Finished Size 9 ft. 6 In. x 11 ft. 6 In. Tarp</div> <div>Finished Length 11 ft. 6 In. Tarp Finished Width 9 ft. 6 In.</div> <div>Tarp Seam Finish Double Stitched Tarp Resistant</div> </div> <div>\$613.88</div> </div> <div> <div>Reject</div> <div>Submit</div> <div>Cancel</div> <div> <div>Comment</div> <div></div> </div> <div> <div> <div> <div></div> <div>↑</div> </div> <div>Drag files here or click to add attachment</div> </div> </div> </div> </div>
7	<p>Click the <b>Submit</b> button to complete the rejection and send the requisition back through workflow to the Requisitioner.</p> <div> <div>Submit</div> </div>

## 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	<p>Log into Oracle.  <b>Home Page -&gt; Procurement -&gt; Purchase Requisitions</b></p> 
2	Click the <b>Manage Requisitions</b> link.
3	<p>Select a Requisition by clicking the <b>Requisition Number</b> link.</p> 
4	Click the <b>View Life Cycle</b> button.

**LUCAS COUNTY**  
Go back one page  
Right-click or pull down to show history  
Requisition: 1216

Requesting BU: Lucas County  
Entered By: Jessica Chapa  
Description: First Aid Chair covered in Non-porous o/e Eye Lamp

Creation Date: 7/30/19  
Status: Approved  
Justification:

Request Amount: 507.00 USD  
Approval Amount: 507.00 USD  
Funds Status: Liquidated  
Attachments: None  
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

**Requisition Lines**

Actions: View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1		First Aid Chair covered in Non-porous o/e Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10093	

Rows Selected: 1 Columns Hidden: 13

**Line 1: Details**

Requester: Jessica Chapa  
Requested Delivery Date: 8/6/19  
Deliver-to Location Type: Internal  
Deliver-to Location: Support Services

Destination Type: Expense  
Buyer: Jessica Chapa  
Suggested Supplier: McKesson Medical-Surgical Government Solutions, LLC  
Supplier Item: CH-70  
Agreement: 13007 (Lucas County)  
Agreement Line: 72

Billing

View Format Freeze Detach Wrap

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

Requisition Life Cycle: 1216

Requisition Line

View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Requester	Quantity	UOM	Price	Amount (USD)	Status
1		First Aid Chair covered in Non-porous o/e Eye Lamp	345	Chapa, Jessica	1	Each	507.00 USD	507.00	Approved

**Order**

Procurement BU: Lucas County  
Requesting BU: Lucas County  
Purchase Order: 10093  
Description: 7/30/19  
Open Date: 7/30/19  
Total: 507.00 USD

Status: Open  
Buyer: Jessica Chapa  
Supplier: McKesson Medical-Surgical Government Solutions, LLC

**Shipments**

View Format Freeze Detach Wrap

Shipment	Shipped Date	Expected Receipt Date	Ship-to Location	Carrier	Tracking Number
No data to display					

**Receipts**

View Format Freeze Detach Wrap

Receipt	Receipt Date	Received By	Shipment	Packing Slip	Waybill	Bill of Lading	Notes
No data to display							

**Invoices**

View Format Freeze Detach Wrap

Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency
1730-02		7/30/19	Not validated	507.00		507.00	507.00	USD

6 Note the Requisition **Status**.

**LUCAS COUNTY**

Requisition: 1216

Requesting BU: Lucas County  
Entered By: Jessica Chapa  
Description: First Aid Chair covered in Non-porous o/e Eye Lamp

Creation Date: 7/30/19  
Status: Approved  
Justification:

Request Amount: 507.00 USD  
Approval Amount: 507.00 USD  
Funds Status: Liquidated  
Attachments: None  
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

**Requisition Lines**

Actions: View Format Freeze Detach Wrap

Line	Item	Description	Category Name	Quantity	UOM	Price	Amount (USD)	Status	Funds Status	Order	Line Life Cycle
1		First Aid Chair covered in Non-porous o/e Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10093	

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**.

Manage Requisitions

Search

Requisitioning BU:

Entered By:  Chapa, Jessica

Requisition:

Description:

Advanced Manage Watchlist Saved Search Requisitions Entered

Status: All

Requester:

Order:

Requisitions Requiring Attention

Search Reset Save...

Search Results

Actions View Format Freeze Detach Wrap

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
10093	1st Chair covered in Non-porous c/w Eye Lamp	7/30/19	507.00USD	Approved	Liquidated	10093
10092	1st Chair covered in Non-porous c/w Eye Lamp	7/30/19	507.00USD	Approved	Liquidated	10092
	Service Contract Agreement	7/29/19	0	Cancelled	Not reserved	
10090	Star LaserJet Pro M477nw All-in-One Wireless Laser Printer with Built-In Ethernet (CF377A)	7/24/19	507.00USD	Approved	Liquidated	10090
10091	Star LaserJet Pro M477nw All-in-One Wireless Laser Printer with Built-In Ethernet (CF377A)	5/21/19	507.00USD	Approved	Liquidated	10091
10008	Corox Commercial Solutions Corox Clean-Up All Purpose Cleaner with Bleach - Original, 32 Ounce Spray Bottle (35417)	5/21/19	9.35USD	Approved	Liquidated	10008
	Professional Services	4/29/19	1,000.00USD	Incomplete		

Rows Selected: 1 Columns Hidden: 5

- 9 Review **'Actions Performed'** and any **'Additional Information'** notes from Approver will be displayed here.

Document History: 1216

Entered By: Jessica Chapa

Requisitioning BU: Lucas County

Requisition: 1216

Description: First Aid Chair covered in Non-porous c/w Eye Lamp

Status: Approved

View Format Freeze Detach Wrap

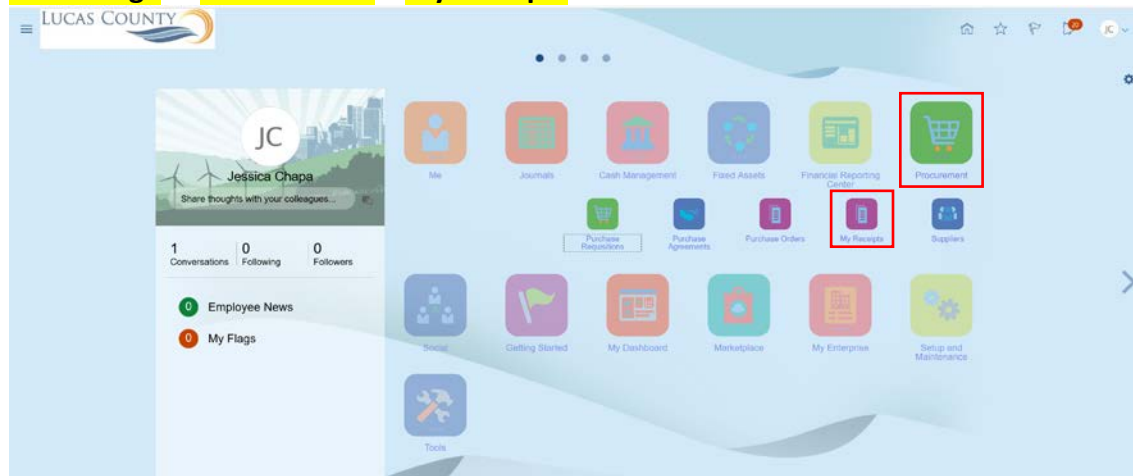
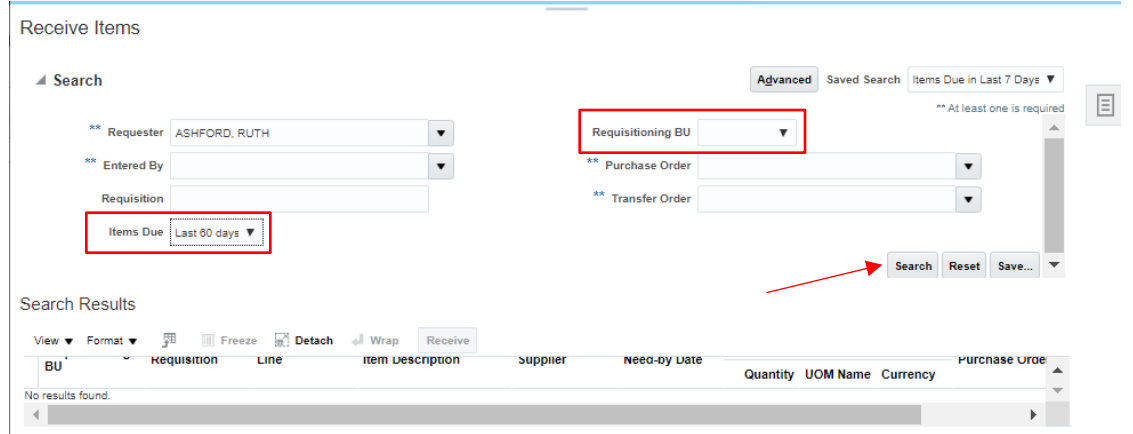

Action Performed	Performed By	Action Date	Reference Document	Additional Information
Submit purchase order	Chapa, Jessica	7/30/19 3:40 PM	PO 10093	
Submit requisition	Chapa, Jessica	7/30/19 3:37 PM	Requisition 1216	
Approve	Ashford, Ruth	7/30/19 3:36 PM		
Reverse	Application	7/30/19 3:36 PM		

- 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	<p>Log into Oracle.  <b>Home Page -&gt; Procurement &gt; My Receipts</b></p> 
2	<p>The <b>Receive Items</b> page displays. Several fields in the <b>Search</b> 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.</p>  <p>Click the <b>Items Due</b> list.</p>
3	Click to select <b>Last 60 days</b> from the list.
4	Click the <b>Requisitioning BU</b> field and select the Business Unit.
	
	Click the <b>Search</b> button.

- 5 From the Search Results, select the row of a requisition to receive against.

Receive Items

Search

Search Results

View Format Freeze Detach Wrap Receive

Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered			Pu
						Quantity	UOM Name	Currency	
Lucas County	1051	2	Clorox Toilet Bowl Clean...	Staples Inc	5/28/19	1	Each	100	
Lucas County	1051	3	Rubbermaid Mop Head, ...	Staples Inc	5/28/19	1	Each	100	
Lucas County	1053	1	First Aid Chair covered in ...	McKesson Medi...	7/31/19	1	Each	100	
Lucas County	1207	1	First Aid Chair covered in ...	McKesson Medi...	7/31/19	1	Each	100	
Lucas County	1214	1	First Aid Chair covered in ...	McKesson Medi...	8/6/19	1	Each	100	
Lucas County	1216	1	First Aid Chair covered in ...	McKesson Medi...	8/6/19	1	Each	100	
Lucas County			Jeep Wagon	Compass Rose ...	6/10/19	1	Each	100	
Lucas County			Jeep Wagon	Compass Rose ...	6/10/19	1	Each	100	
Lucas County			FA Equipment	TASC of Northw...		1	Each	100	

- 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.

Create Receipts

Submit Cancel

Actions View Format Freeze Detach Wrap Remove Line Show Receipt Quantity

Requisition	Item Description	* Quantity	UOM Name	Currency	* Transaction Date	Waybill	Packing Slip	Requisitioning BU	Purchase Order	Transfer Order
1159	Logitech M310 USB ...		Each		10-29-2011			Lucas County	190078	

Columns Hidden 11

- 8 Compare the displayed quantity to what was received on hand. If different from what displays in the Quantity field, enter the quantity received.

Create Receipts

Submit Cancel

Actions View Format Freeze Detach Wrap Remove Line Show Receipt Quantity

Requisition	Item Description	* Quantity	UOM Name	Currency	* Transaction Date	Waybill	Packing Slip	Requisitioning BU
1159	Logitech M310 USB ...	1	Each		10-29-2011			Lucas

Click the **Submit** button.

- 9 Click the **OK** button to acknowledge the receipt.

Confirmation

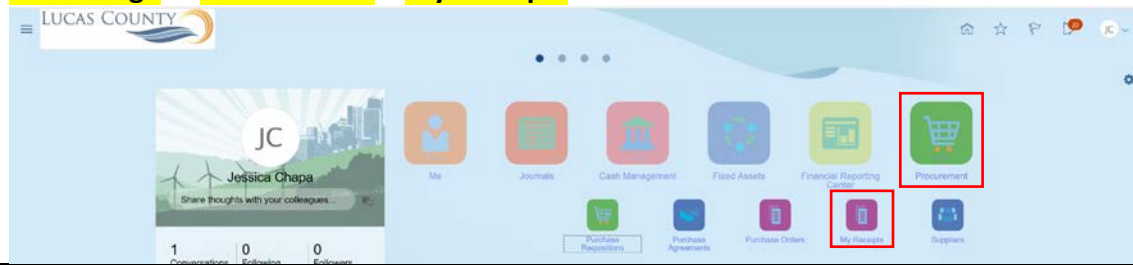
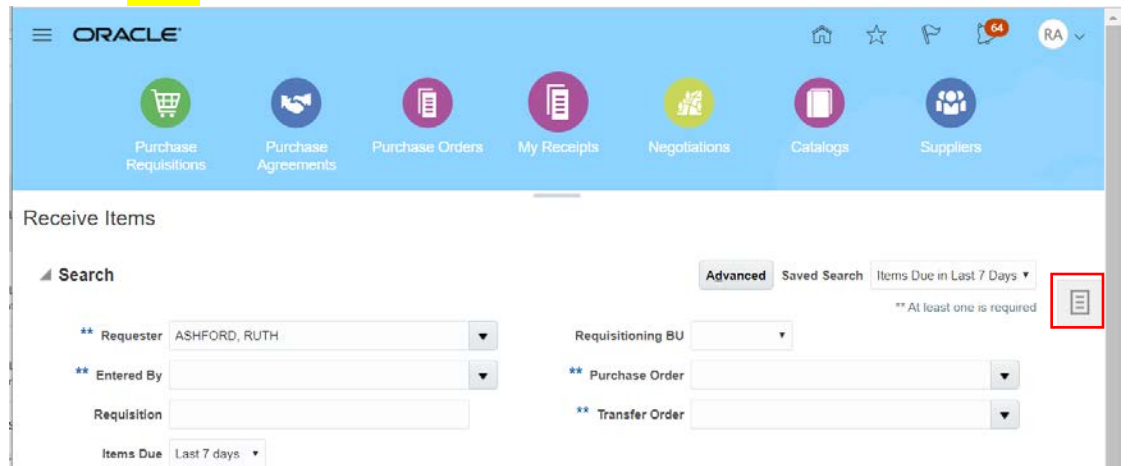
You created the following receipt numbers: 2121.

OK

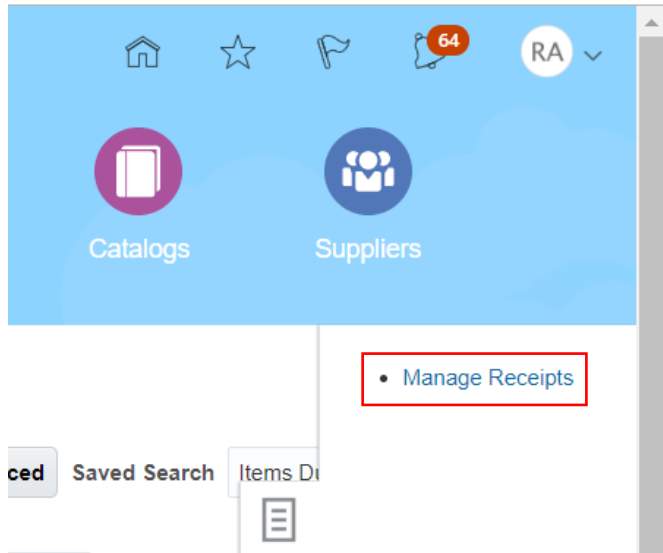
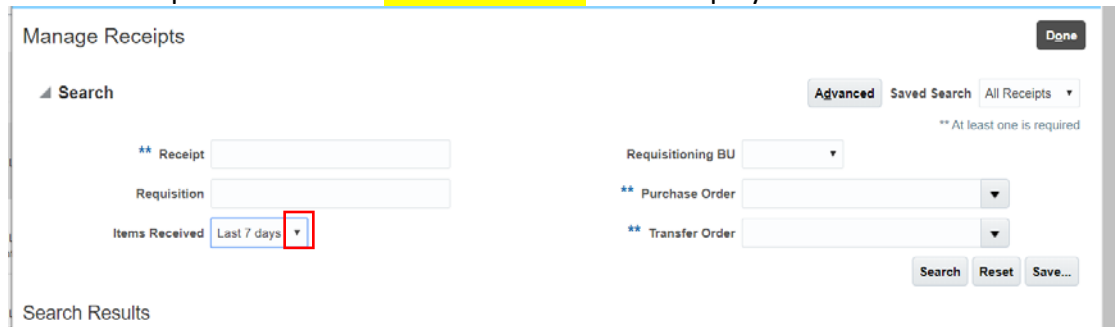
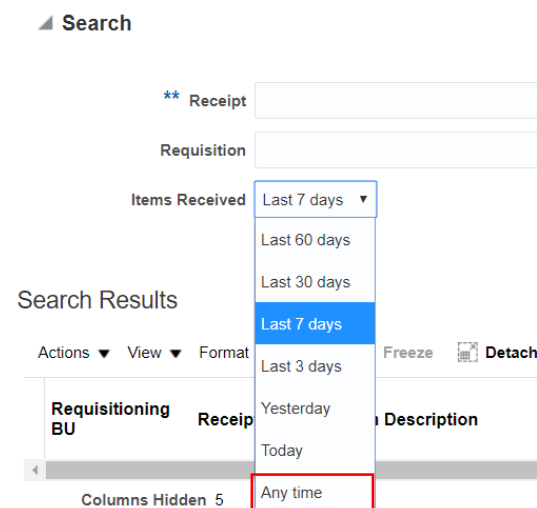
## Perform Receiving Corrections

**Audience:** Requesters, Receivers

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

Step	Action
1	<p>Log into Oracle  <b>Home Page</b> -&gt; <b>Procurement</b> &gt; <b>My Receipts</b></p> 
2	Click the <b>My Receipts</b> button.
3	<p>Click the <b>Tasks</b> icon.</p> 
4	Click the <b>Manage Receipts</b> link.



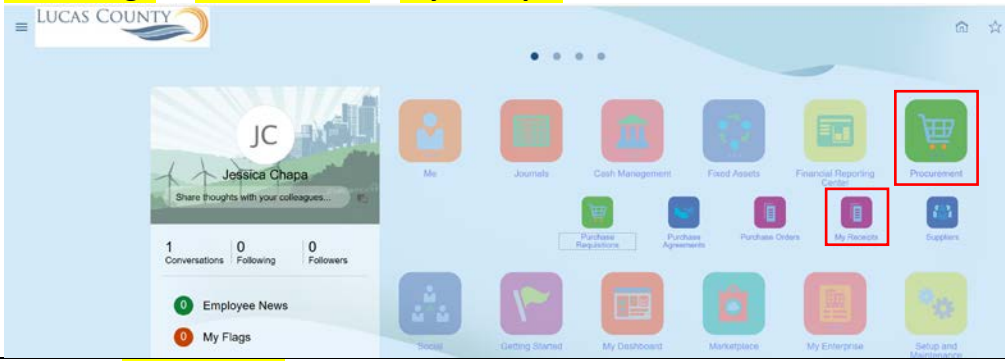
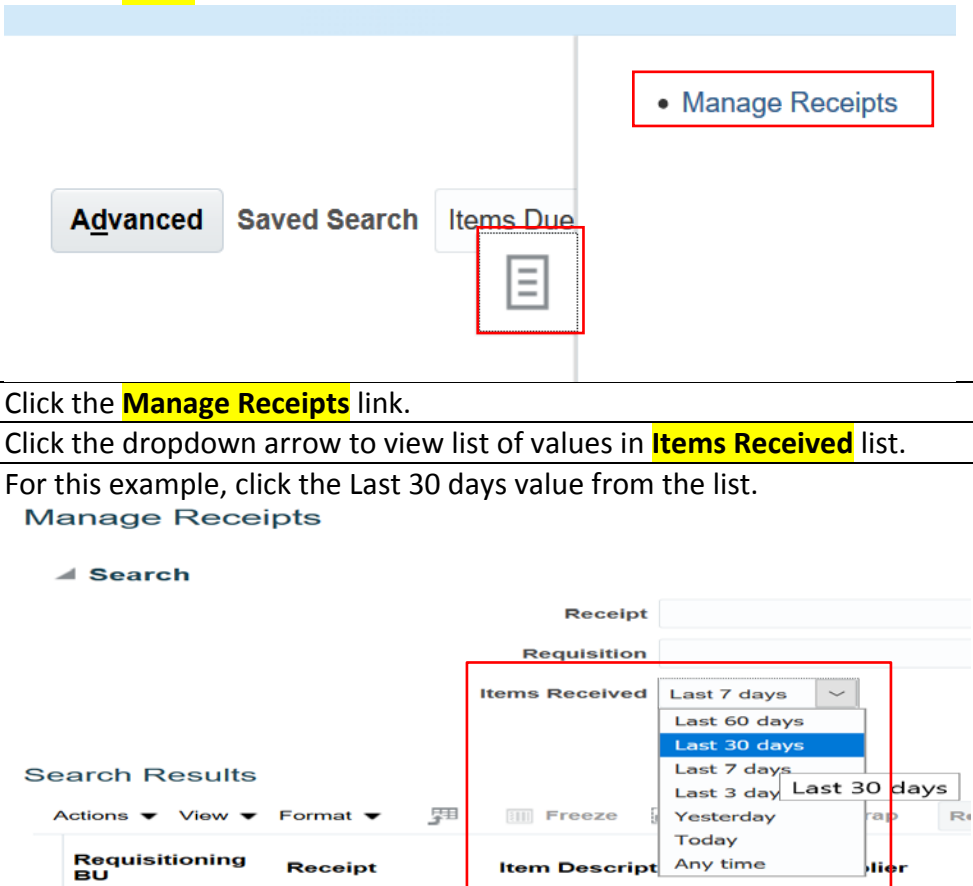
	
5	<p>Click the dropdown arrow in <b>Items Received</b> list to display the values:.</p> 
6	<p>Click the <b>Anytime</b> option from this list.</p> <p>Manage Receipts</p> 
7	<p>Click the <b>Requesting BU</b> field and select the Business Unit. In addition, at least one of the following must be entered to produce results from this page:</p>



## Create Returns to Receipts

**Audience:** Requesters, Receivers

**Purpose:** This job aid will assist you with creating returns from goods received.

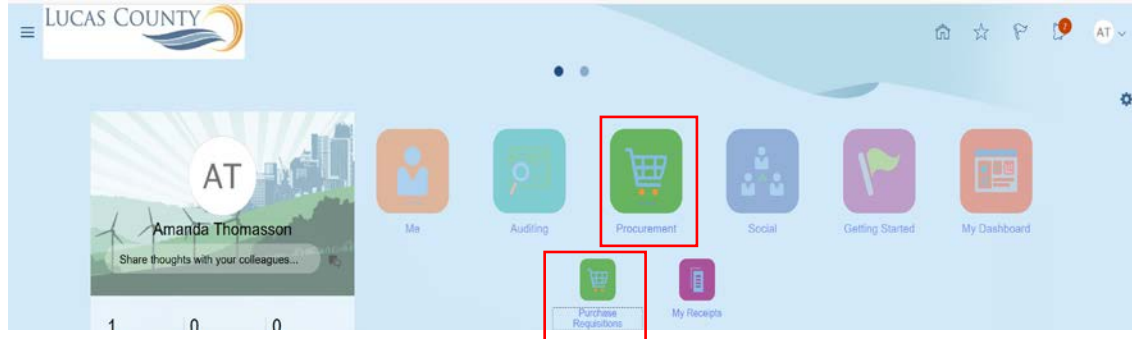
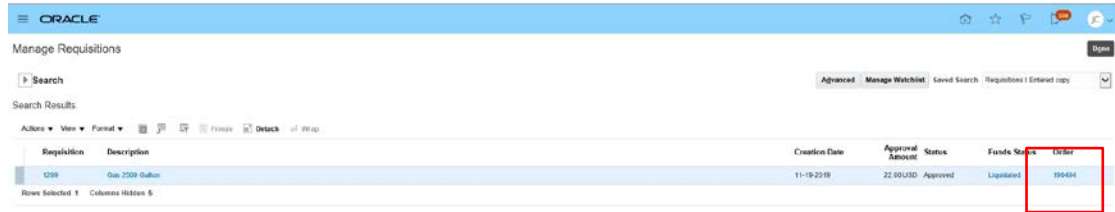
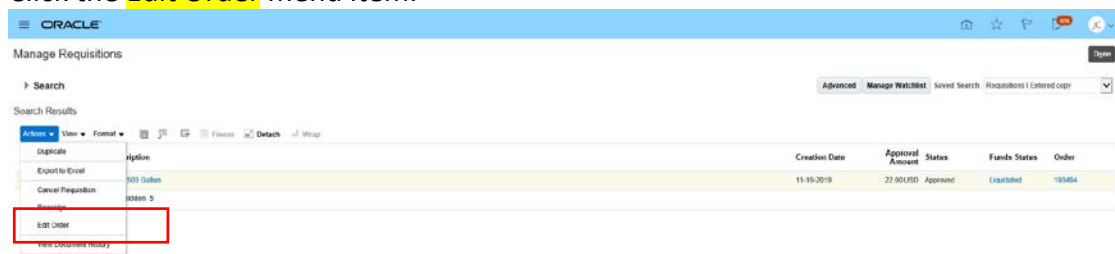

Step	Action
1	<p>Log into Oracle  <b>Home Page</b> -&gt; <b>Procurement</b> &gt; <b>My Receipts</b></p> 
2	Click the <b>My Receipts</b> Icon.
3	Click the <b>Tasks</b> icon.
4	Click the <b>Manage Receipts</b> link.
5	Click the dropdown arrow to view list of values in <b>Items Received</b> list.
6	<p>For this example, click the Last 30 days value from the list.</p> 



7	Click the <b>Search</b> button.																																							
8	<div>Select a row to be returned and click the <b>Return</b> button.</div> <div><div>Manage Receipts</div><div>▶ Search</div><div>Search Results</div><div>Actions ▼ View ▼ Format ▼   Detach  <b>Return</b> Correct</div><table><thead><tr><th rowspan="2">Requisitioning BU</th><th rowspan="2">Receipt</th><th rowspan="2">Item Description</th><th rowspan="2">Supplier</th><th colspan="3">Received</th><th rowspan="2">Receipt Date</th><th rowspan="2">Purchase Order</th></tr><tr><th>Quantity</th><th>UOM Name</th><th>Currency</th></tr></thead><tbody><tr><td>Lucas County</td><td>2009</td><td>Test</td><td>E Technologies, Inc.</td><td>5</td><td>Each</td><td></td><td>6/3/19 11:09...</td><td>10035</td></tr><tr><td>Lucas County</td><td>2012</td><td>Jeep Wagon</td><td>Compass Rose Soluti...</td><td>1</td><td>Each</td><td></td><td>6/4/19 11:20...</td><td>10049</td></tr><tr><td>Lucas County</td><td>2014</td><td>Jeep Wagon</td><td>Compass Rose Soluti...</td><td>1</td><td>Each</td><td></td><td>6/4/19 3:59 ...</td><td>10061</td></tr></tbody></table><div>Rows Selected 1 Columns Hidden 2</div></div>	Requisitioning BU	Receipt	Item Description	Supplier	Received			Receipt Date	Purchase Order	Quantity	UOM Name	Currency	Lucas County	2009	Test	E Technologies, Inc.	5	Each		6/3/19 11:09...	10035	Lucas County	2012	Jeep Wagon	Compass Rose Soluti...	1	Each		6/4/19 11:20...	10049	Lucas County	2014	Jeep Wagon	Compass Rose Soluti...	1	Each		6/4/19 3:59 ...	10061
Requisitioning BU	Receipt					Item Description	Supplier	Received			Receipt Date	Purchase Order																												
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Lucas County	2014	Jeep Wagon	Compass Rose Soluti...	1	Each		6/4/19 3:59 ...	10061																																
9	Click in the <b>*Return Quantity</b> field.																																							
10	<div>Enter the return quantity into the <b>*Return Quantity</b> field and select a <b>Reason</b>.</div> <div><div><div>LUCAS COUNTY</div><div>Return Receipts</div><div>Actions ▼ View ▼ Format ▼   Detach  Remove Line</div><table><thead><tr><th rowspan="2">Requisitioning BU</th><th rowspan="2">Receipt</th><th rowspan="2">Item Description</th><th rowspan="2">Supplier</th><th colspan="2">Received</th><th>* Return Quantity</th><th>Reason</th><th rowspan="2">RMA</th><th rowspan="2">Note</th></tr><tr><th>Quantity</th><th>UOM Name</th><th></th><th></th></tr></thead><tbody><tr><td>Lucas County</td><td>2012</td><td>Jeep Wagon</td><td>Compass Rose Solutions,...</td><td>1</td><td>Each</td><td>1</td><td>Rejects</td><td></td><td></td></tr></tbody></table><div>Rows Selected 1 Columns Hidden 1</div></div></div>	Requisitioning BU	Receipt	Item Description	Supplier	Received		* Return Quantity	Reason	RMA	Note	Quantity	UOM Name			Lucas County	2012	Jeep Wagon	Compass Rose Solutions,...	1	Each	1	Rejects																	
Requisitioning BU	Receipt					Item Description	Supplier	Received				* Return Quantity	Reason	RMA	Note																									
		Quantity	UOM Name																																					
Lucas County	2012	Jeep Wagon	Compass Rose Solutions,...	1	Each	1	Rejects																																	
11	Click the <b>Submit</b> button.																																							
12	Click the <b>OK</b> button.																																							

## Edit Order

**Audience:** Requesters

**Purpose:** This job aid will assist you with editing a Purchase Order which has been issued and approved.

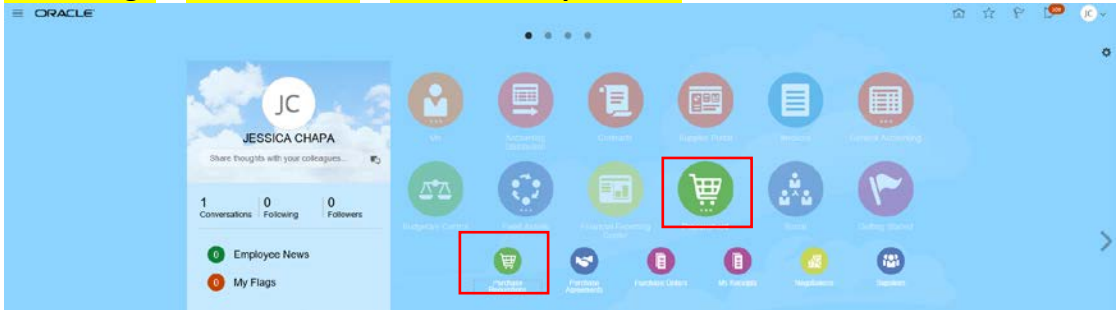
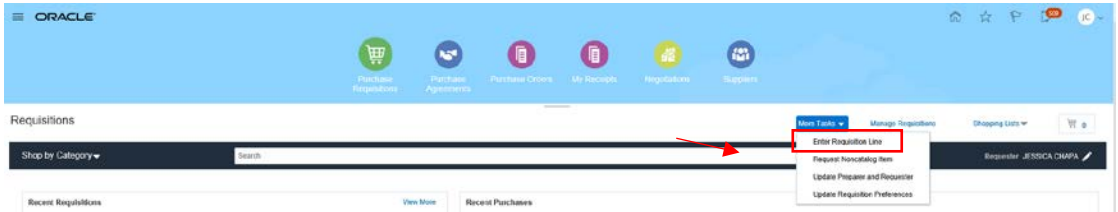
Step	Action
1	<p>Log into Oracle.  <b>Home Page</b> -&gt; <b>Procurement</b> -&gt; <b>Purchase Requisitions</b></p> 
2	Click the <b>Manage Requisitions</b> link to view details of requisitions you created.
3	<p><b>Search</b> for Requisition which has been approved and a Purchase Order has been created and approved.</p> 
4	Highlight the <b>Requisition</b> to be changed.
5	Click the <b>Actions</b> drop-down list.
6	<p>Click the <b>Edit Order</b> menu item.</p> 
7	<p>A warning message will be displayed. Click the <b>Yes</b> button to continue.</p> 

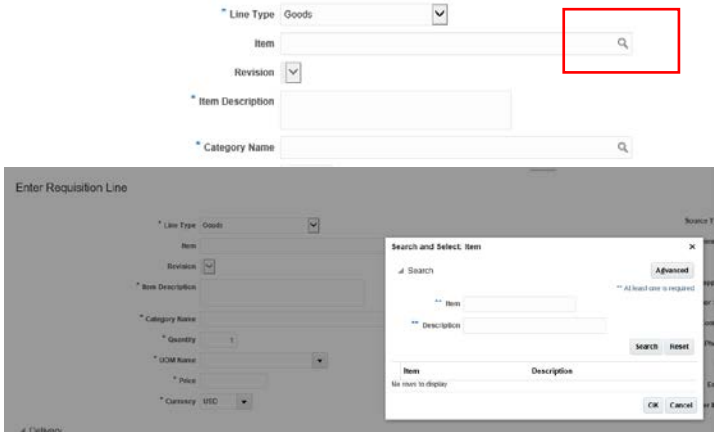
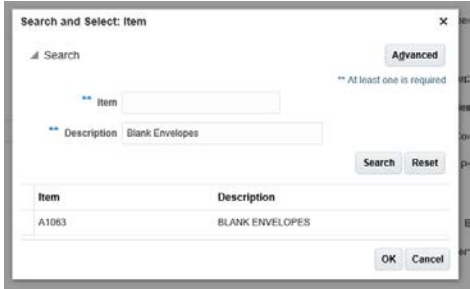
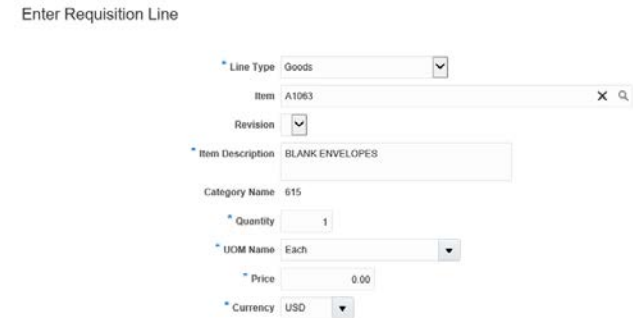
8	<p>Enter <b>Description</b> of the Change</p> 
9	Perform necessary changes to the Order.
10	<p>Enter <b>Change Reason</b></p> 
11	Click the <b>Save</b> button.
12	Click the <b>Submit</b> button. The Order will be sent for approval.
13	Click the <b>OK</b> button.

## Create Requisition Line Entry for Item Master Items

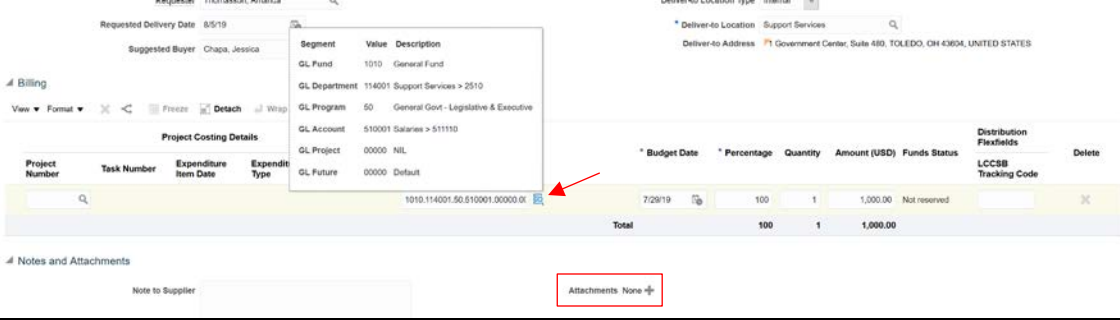
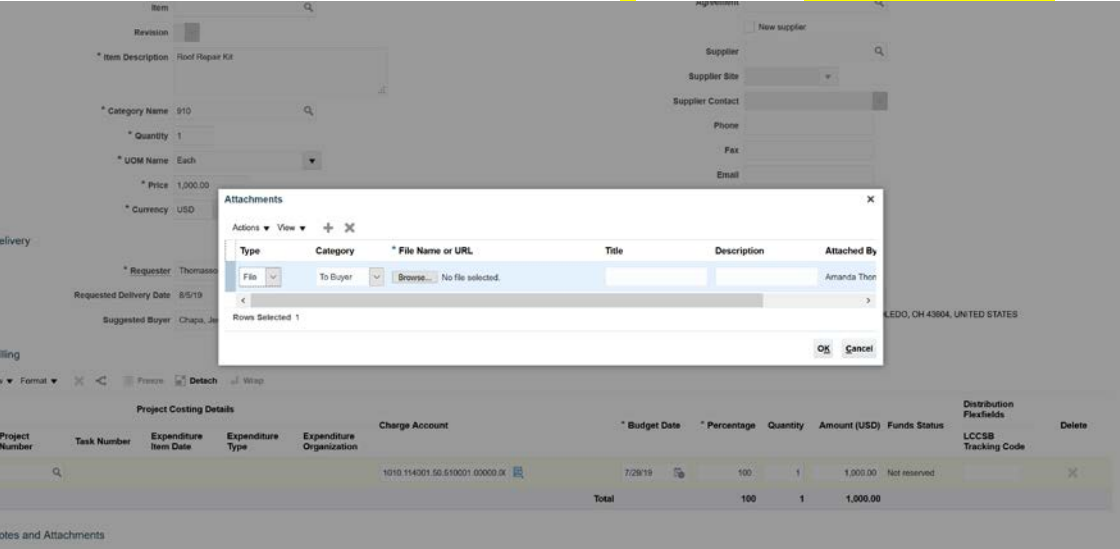
**Audience:** Requesters

**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	<p>Log into Oracle.</p> <p><b>Home Page &gt; Procurement &gt; Purchase Requisitions</b></p> 
2	<p>Click the <b>More Tasks &gt; Enter Requisition Line</b> link.</p> 
3	Click the <b>Line Type</b> list.
4	<p>Select the <b>Goods</b> list item.</p> <p>* Line Type <input type="text" value="Goods"/></p>
5	Select the Item <b>Search</b> Icon

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



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

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