



Self Service Procurement Training

Oracle Cloud Applications Implementation Lucas County

December 2019



Oracle Cloud Self Service Procurement

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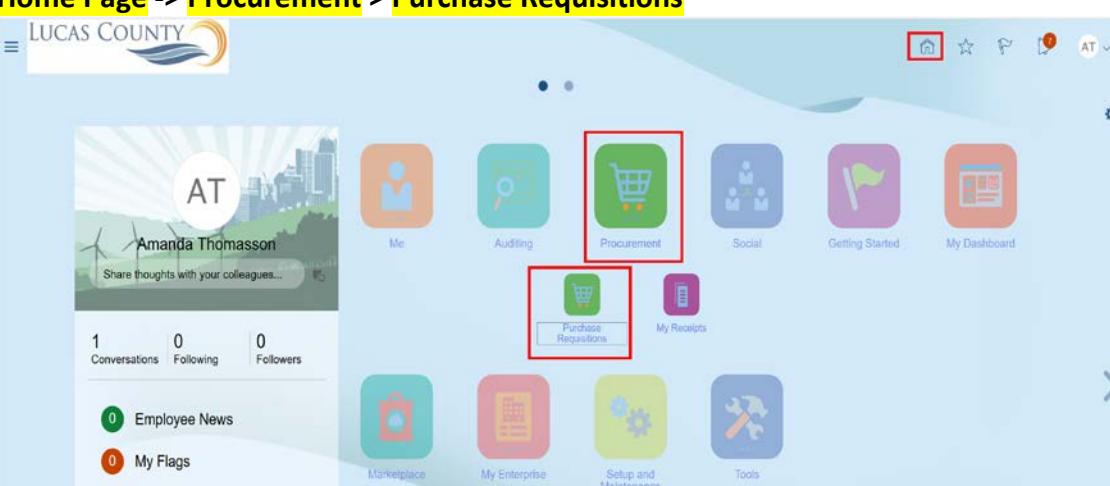
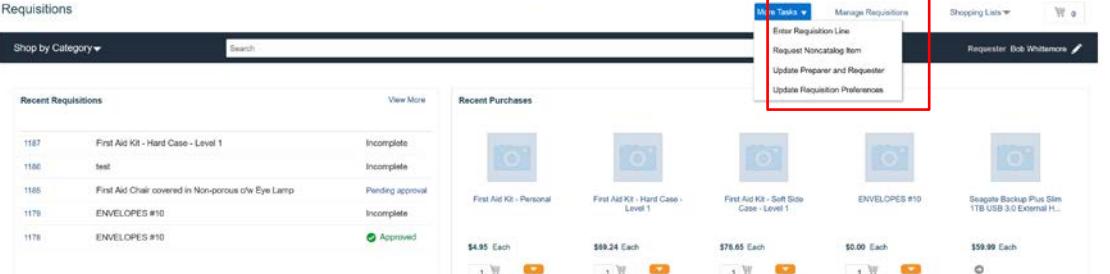
*These Job Aids only apply to following Lucas County Agencies: Mental Health & Recovery Services, Board of Developmental Disabilities, Lucas County Children Services, Toledo Lucas County Health Department, Lucas County Emergency Planning Commission, Lucas County Soil & Water, Olander Park and Board of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



Set Requisition Preferences - Multiple Accounts

Audience: Requesters

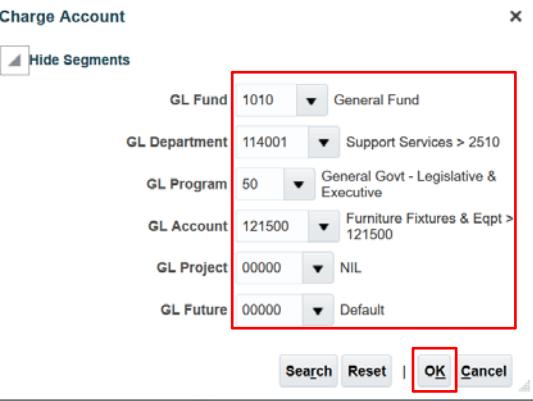
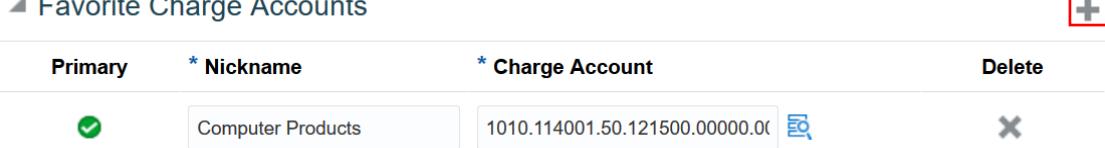
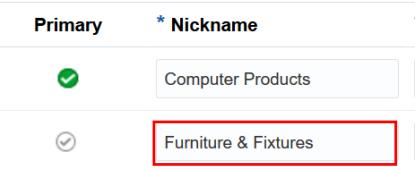
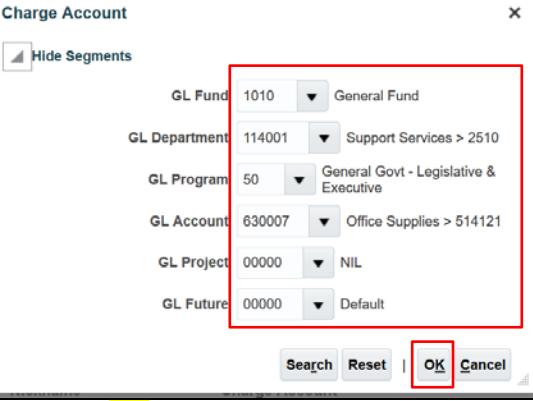
Purpose: This job aid will provide guidance in setting up preferences to allow for ease of purchase requisition process.

Step	Action
1	Log into Oracle. Home Page -> Procurement > Purchase Requisitions  A screenshot of the Oracle Home Page. At the top, the Lucas County logo is visible. Below it is a banner with a user profile picture and the text "AT" and "Amanda Thomasson". The page shows "1 Conversations", "0 Following", and "0 Followers". There are sections for "Employee News" and "My Flags". A navigation bar at the top right includes icons for Home, Star, Print, and AT. Below the banner, there are several icons: Me (orange), Auditing (teal), Procurement (green, highlighted with a red box), Social (blue), Getting Started (purple), My Dashboard (red). A sub-menu for Procurement is open, showing "Purchase Requisitions" (green icon with a red box). Other icons in this sub-menu include Marketplace (teal), My Enterprise (red), Setup and Maintenance (yellow), and Tools (blue). A "More Task" button is visible on the right, with a red box highlighting the "Update Requisition Preferences" option in the dropdown menu.
2	Click the More Task button and select Update Requisition Preferences .  A screenshot of the Oracle Purchase Requisitions page. The "More Task" menu is open, with a red box highlighting the "Update Requisition Preferences" option. The page displays "Recent Requisitions" and "Recent Purchases" sections. The "Recent Requisitions" table includes rows for "1187 First Aid Kit - Hard Case - Level 1", "1186 test", "1185 First Aid Chair covered in Non-porous o/w Eye Lamp", "1178 ENVELOPES #10", and "1178 ENVELOPES #10". The "Recent Purchases" section shows items like "First Aid Kit - Personal", "First Aid Kit - Hard Case - Level 1", "First Aid Kit - Soft Side Case - Level 1", "ENVELOPES #10", and "Seagate Backup Plus Slim 1TB USB 3.0 External H...".
3	Under the Favorite Charge Accounts click the Add Row button . The '+' icon represents adding a row.



	<p>Edit Requisition Preferences</p> <p>Requisitioning BU Lucas County</p> <p>▲ Shipping and Delivery</p> <p>* Requester Chapa, Jessica <input type="button" value="🔍"/></p> <p>* Deliver-to Location Support Services <input type="button" value="🔍"/></p> <p>Destination Type Expense <input type="button" value="▼"/></p> <p>▲ Billing</p> <p>▲ Projects</p> <p>Project Number <input type="button" value="🔍"/></p> <p>Task Number <input type="button" value="🔍"/></p> <p>Expenditure Type <input type="button" value="🔍"/></p> <p>Expenditure Organization <input type="button" value="🔍"/></p> <p>▲ Favorite Charge Accounts <input type="button" value="+"/></p> <table border="1"><thead><tr><th>Primary</th><th>* Nickname</th><th>* Charge Account</th><th>Delete</th></tr></thead><tbody><tr><td></td><td></td><td></td><td></td></tr></tbody></table> <p>4 Click in the *Nickname field. Requesters can enter multiple Charge Accounts with identifying Nicknames if they normally use more than one account to charge requisition lines to. One account must be identified as the default primary (Tick Mark) account.</p> <p>5 Enter information into the *Nickname field.</p> <p>▲ Favorite Charge Accounts</p> <table border="1"><thead><tr><th>Primary</th><th>* Nickname</th></tr></thead><tbody><tr><td><input checked="" type="checkbox"/></td><td>Computer Products</td></tr></tbody></table> <p>6 Click the *Charge Account List of values button. Select the default charge account values that will default into the Requisition.</p> <p>* Charge Account <input type="button" value="🔍"/></p>	Primary	* Nickname	* Charge Account	Delete					Primary	* Nickname	<input checked="" type="checkbox"/>	Computer Products
Primary	* Nickname	* Charge Account	Delete										
Primary	* Nickname												
<input checked="" type="checkbox"/>	Computer Products												



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



► Favorite Charge Accounts

Primary	* Nickname	* Charge Account	Delete
<input checked="" type="checkbox"/>	Computer Products	1010.114001.50.121500.00000.00	
<input checked="" type="checkbox"/>	Furniture & Fixtures	1010.114001.50.630007.00000.00	
<input type="button" value="Set Primary"/>		<input type="button" value="Save and Close"/> <input type="button" value="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

Source Type: Supplier

Agreement: New supplier

Supplier:

Supplier Site:

Supplier Contact:

Phone:

Fax:

Email:

Supplier Item:

Line Type: Goods

Item:

Revision:

Item Description:

Category Name:

Quantity: 1

UOM Name:

Price:

Currency: USD

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

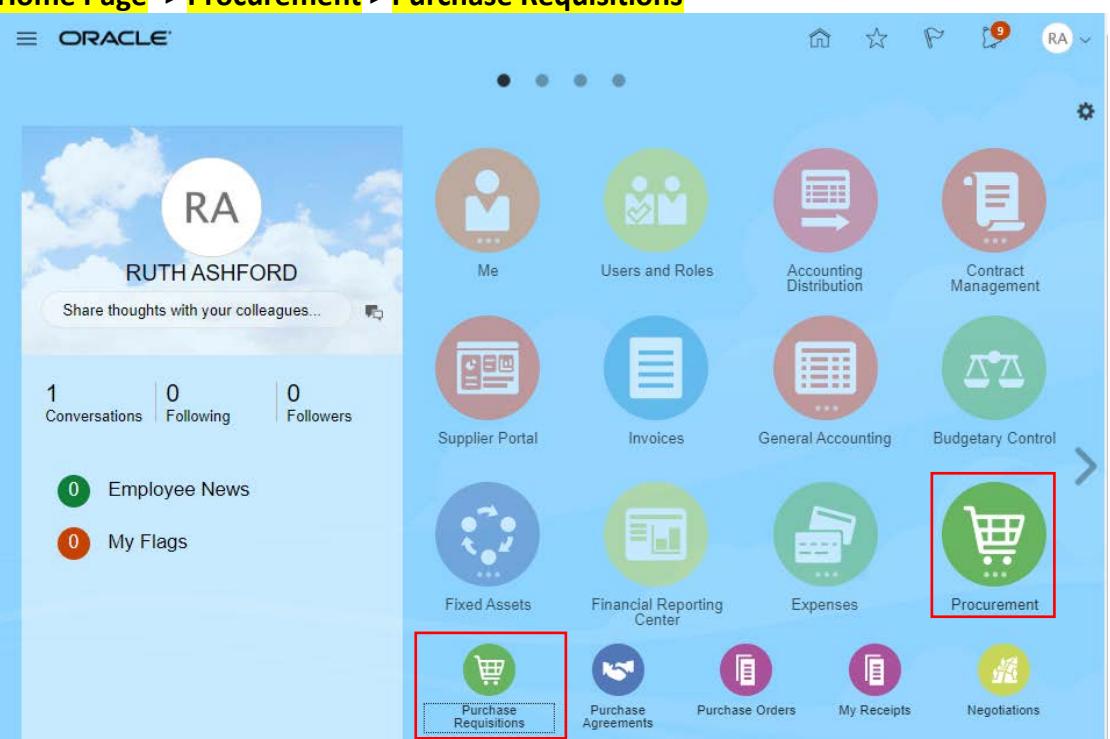
Project Costing Details

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

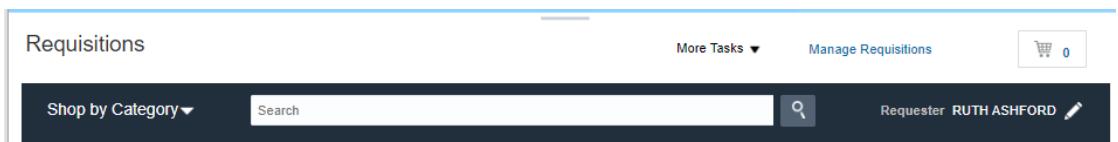
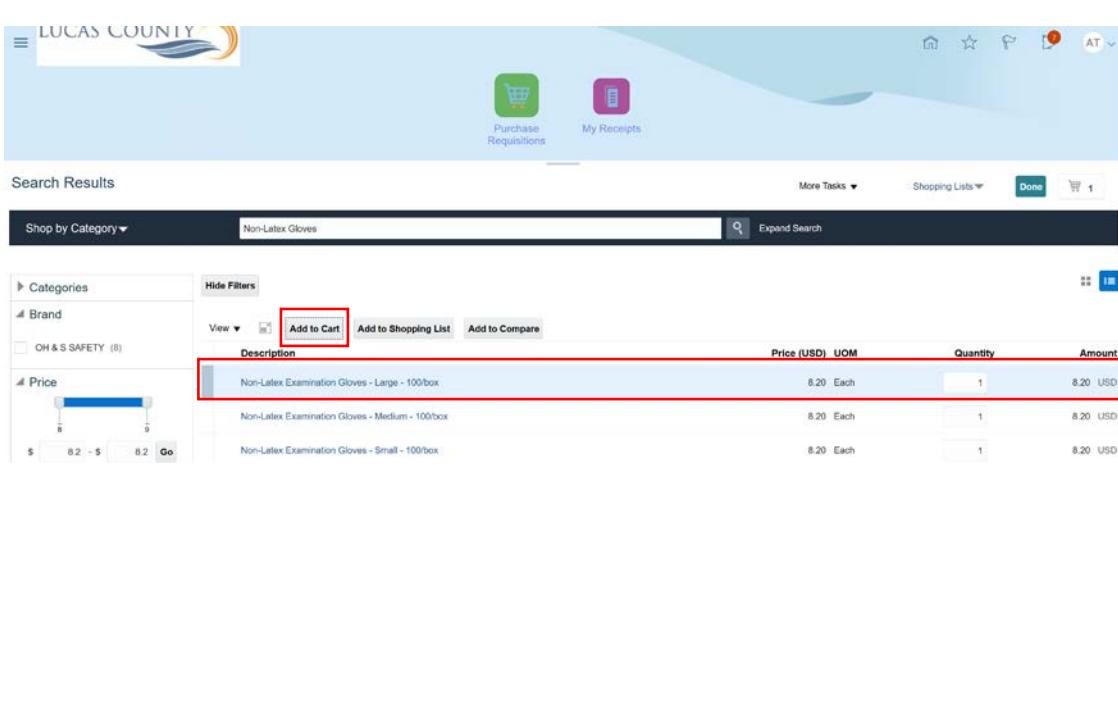
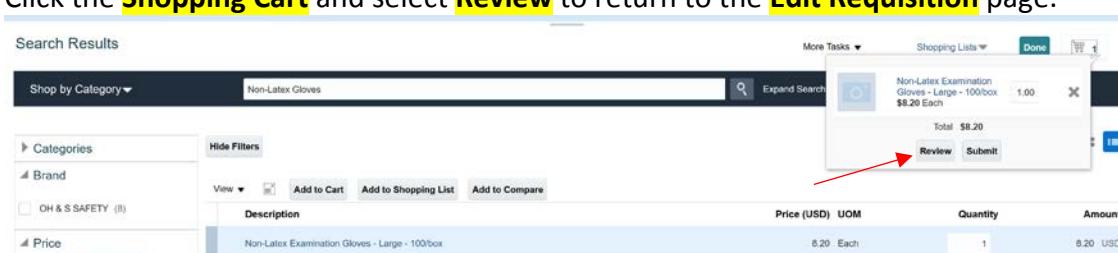
Create Requisition from a Catalog (Internal and Punchout)

Audience: Requesters

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

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



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



Edit Requisition: 1193

Requisitioning BU Lucas County

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

* State Contract - If yes, please insert Contract Number

Justification

Requisition Amount 8.20 USD
Approval Amount 8.20 USD
Funds Status Not reserved
Attachments None

* State Contract Number

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

* Resolution Attached

* Will Services be performed on Lucas County property?

Requisition Lines

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

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

Edit Requisition: 1193

Requisitioning BU Lucas County

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

* State Contract - If yes, please insert Contract Number

State Contract Number

Justification

Requisition Amount 8.20 USD
Approval Amount 8.20 USD
Funds Status Not reserved
Attachments None

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

* Resolution Attached

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Requisition Lines

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

Rows Selected 1 Columns Hidden 8

Line 1: Details

Delivery

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

Edit Requisition: 1193

Requisitioning BU Lucas County

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

* State Contract - If yes, please insert Contract Number

State Contract Number

Sole Source - If yes please attach proof of Sole Source

Justification

Requisition Amount 8.20 USD
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Attachments None

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Requisition Lines

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

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



	<p>Edit Requisition: 1193</p> <p>Requisitioning BU Lucas County</p> <p>* Description Non-Latex Examination Gloves - Large - 100/box</p> <p>Justification</p> <p>Requisition Amount 8.20 USD</p> <p>Approval Amount 8.20 USD</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 Resolution Attached</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>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="9">Total 8.20</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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Total 8.20																												
10	<p>Select Y/N *Will Services be performed on Lucas County property? In this example select 'N'.</p> <p>*****</p>																											
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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																												
11	Does this purchase require the attachment of the LCIS Checklist? If so, please attach in the Attachments section below.																											
12	Click the Check Funds button.																											



Edit Requisition: 1193

Requisitioning BU: Lucas County

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

Justification:

Requisition Amount: 8.20 USD

Approval Amount: 8.20 USD

Funds Status: Passed

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:

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	
Total: 8.20								

Rows Selected: 1 Columns Hidden: 8

Actions: View Format

* Requester: Thomasson, Amanda

Deliver-to Location Type: Internal

Confirmation
The transaction passed the funds check process.
[View Funds Check Results](#) **OK**

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

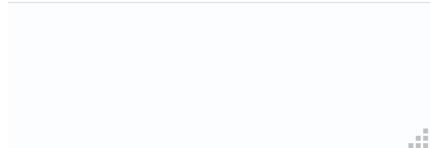
Attachments None

15 Click the **Manage Approvals** button.



	<p>Shop Check Funds Manage Approvals View PDF Save ▾ Submit</p> <p>Requisition Amount 8.20 USD</p> <p>Approval Amount 8.20 USD</p> <p>Funds Status Passed</p> <p>Attachments None </p> <p>Review the approval path for the requisition.</p> <p>Manage Approvals (Requisition 1193)</p> <p>Back Submit</p> <table border="1"><thead><tr><th>Section</th><th>Stage or Participant</th></tr></thead><tbody><tr><td>1</td><td>Header Preapproval Stage Amanda Thomasson - Requester FYI</td></tr><tr><td>1.1</td><td></td></tr><tr><td>1.2</td><td>Parallel Pre Approval Header First Responder Wins Amanda Thomasson - Pre Approval Header First Responder Wins</td></tr><tr><td>1.2.1</td><td></td></tr><tr><td>1.2.1.1</td><td></td></tr><tr><td>1.2.1.2</td><td>Ruth Ashford - Pre Approval Header First Responder Wins</td></tr><tr><td>2</td><td>Header Stage Applications Devel...</td></tr></tbody></table> <p>16 Click the Back button.</p> <p>17 Click the Submit button.</p>	Section	Stage or Participant	1	Header Preapproval Stage Amanda Thomasson - Requester FYI	1.1		1.2	Parallel Pre Approval Header First Responder Wins Amanda Thomasson - Pre Approval Header First Responder Wins	1.2.1		1.2.1.1		1.2.1.2	Ruth Ashford - Pre Approval Header First Responder Wins	2	Header Stage Applications Devel...
Section	Stage or Participant																
1	Header Preapproval Stage Amanda Thomasson - Requester FYI																
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	Shop Check Funds Manage Approvals View PDF Save ▼ Submit
	
	Requisition Amount 8.20 USD
	Approval Amount 8.20 USD
	Funds Status Passed
	Attachments None 
18	Click the OK button.

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

A screenshot of the Lucas County requisitions page. At the top, there are icons for "Purchase Requisitions" and "My Receipts". Below that is a search bar and a "Requisitions" section. The "Recent Purchases" section shows a message: "No data to display." The "Recent Requisitions" section lists several items with status "Approved":

- 1160 Cement Mixer Operator
- 1159 Industrial Cement Mixing Unit
- 1154 Window Washing Service
- 1153 Ford F-250 Heavy Duty Pickup Truck
- 1152 Road Maintenance Repair - Asphalt fill for potholes

Under "Top Categories", there are links for "CDW", "GRAINGER", and "Staples", with "Staples" highlighted with a red box.

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

A screenshot of the search results page. The "Related Suppliers" section contains a link to "Staples", which is highlighted with a red box.

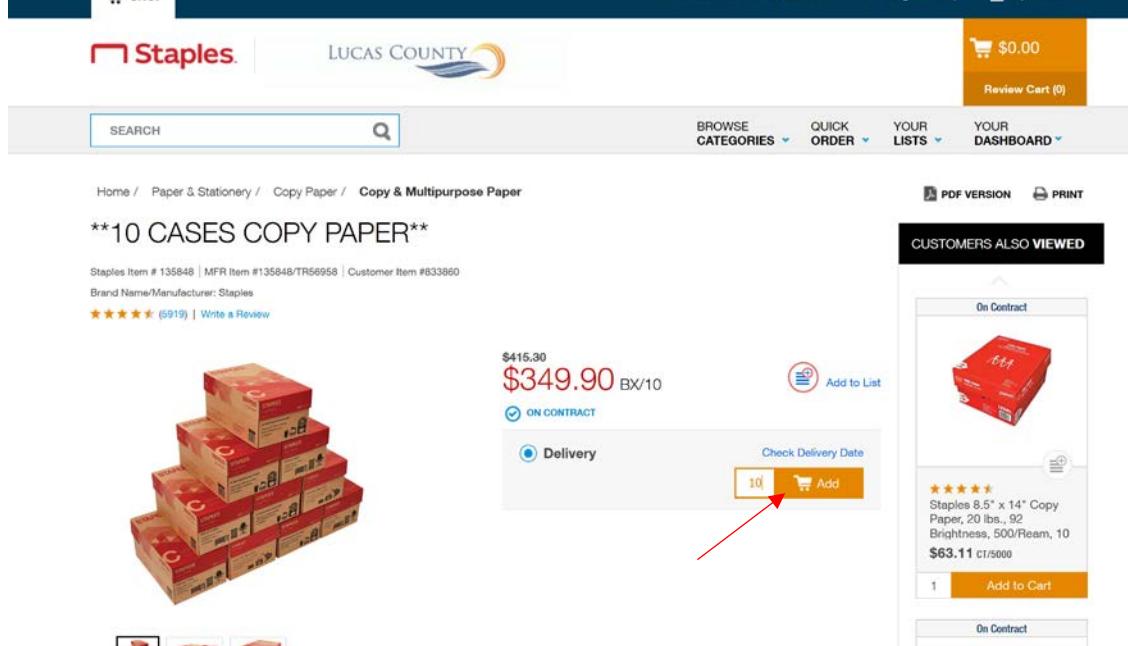
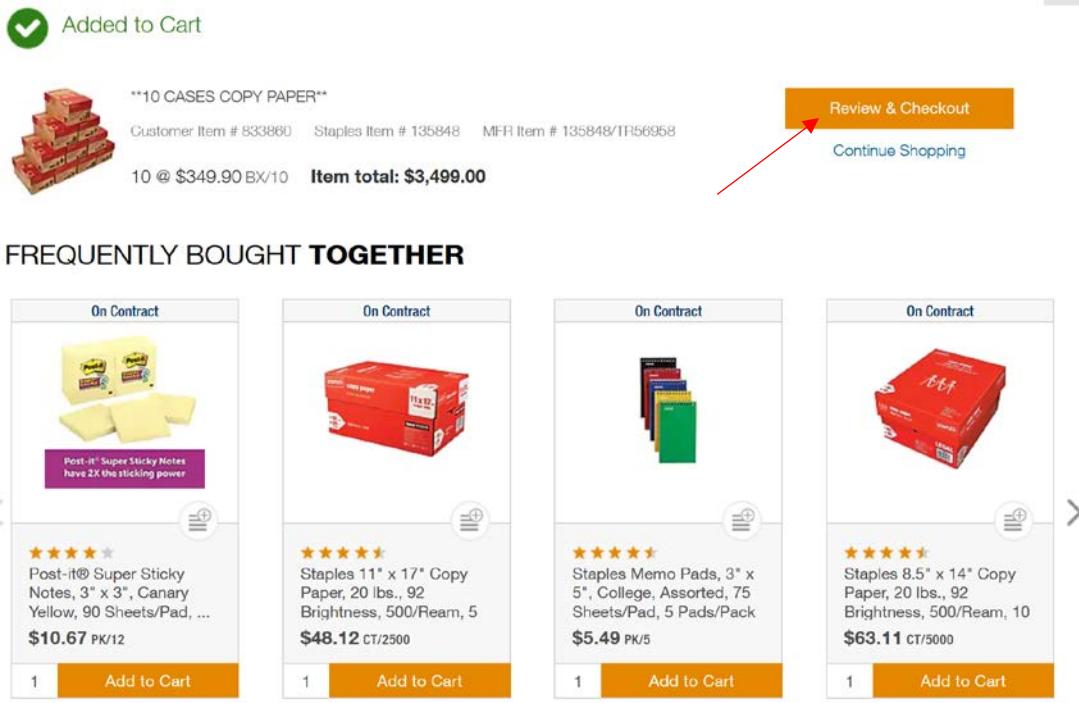
This will connect you to the supplier site for ordering.

A screenshot of the Staples website. The top navigation bar includes "SHOP", "Account Number: 1844267DET", "Messages", "Help", "My Account", and a "Review Cart (0)" button. The main header features the "Staples" logo and "LUCAS COUNTY" logo. Below the header is a search bar and a "SEARCH" button. The main content area features a "Spark new ideas" banner with a computer setup and a "Shop now" button. The "RECOMMENDED FOR YOU" section displays five product cards:

- On Contract "10 CASES COPY PAPER"
- On Contract "Sharpie Permanent Markers, Fine Point, Black, 12/Pack (30001)"
- On Contract "Staples Notepads, 8.5" x 11.75", Wide Ruled, White, 50 Sheets/Pad, 12/Pack (5200012)"
- On Contract "Staples Invisible Tape, 3/4" x 1,296", 12/Pack (5200012)"
- On Contract "Kleenex Boutique Standard Facial Tissues, 2-Ply, 95 Sheets/Box, 6/Pack (5200012)"

On the right side of the page, there are "Feedback" and "Live Chat" buttons.



4	Search for Item by name or number.
5	Update the Quantity and Add to Cart .
5	
6	Click the Review & Check Out button.
6	
7	Click the Submit Order button. This will return you back to the requisition.



Subtotal \$3,499.00

TOTAL \$3,499.00

SUBMIT ORDER

8 View the Source information. Does this purchase require the attachment of the LCIS Checklist? If so, attach in the Attachments section.

Edit Requisition: 1193

Requisitioning BU		Justification	Requisition Amount																															
Lucas County			3,499.00	USD																														
* Description Staples ***10 CASES COPY PAPER**		Approval Amount Calculate Amount with Tax																																
* State Contract - If yes, please insert Contract Number Yes		Funds Status Not reserved																																
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																																		
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<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></td> <td>640</td> <td>10</td> <td>Each</td> <td>349.90</td> <td>USD</td> <td>3,499.00</td> <td>Not reserved</td> <td>X</td> </tr> <tr> <td colspan="2"></td> <td>Total</td> <td colspan="6">3,499.00</td> <td></td> </tr> </tbody> </table>					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						
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																																		

9 The **Edit Requisition** page is now displayed. Select Y/N option for ***State Contract - If yes, please insert Contract Number.**

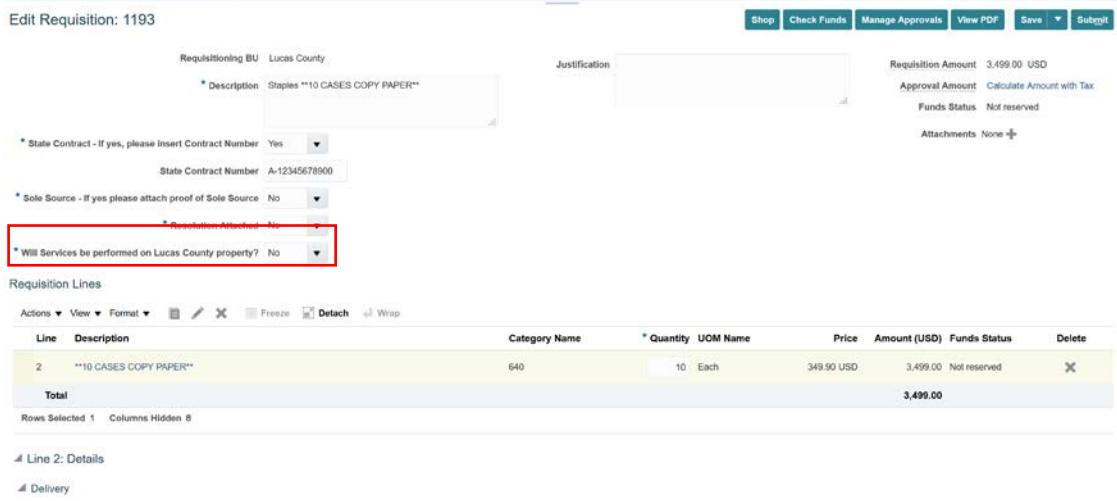
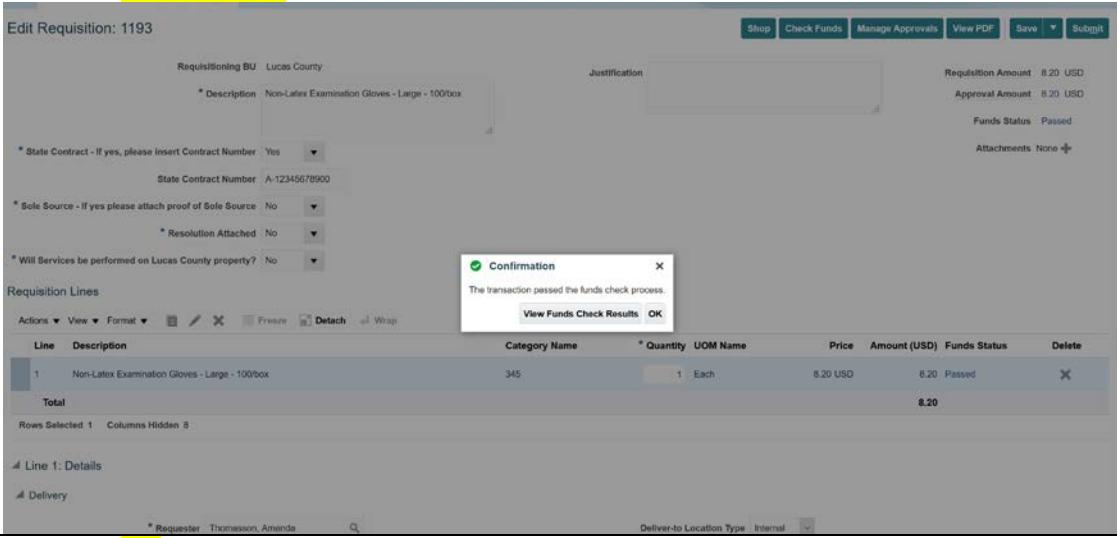


	<p>Edit Requisition: 1193</p> <p>Requisitioning BU Lucas County</p> <p>* Description Staples **10 CASES COPY PAPER**</p> <p>* State Contract - If yes, please Insert Contract Number Yes <input type="text" value="A-12345678900"/></p> <p>* Sole Source - If yes please attach proof of Sole Source No</p> <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="8">Total</td><td>3,499.00</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	Total								3,499.00
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Total								3,499.00																				
10	<p>Enter if 'Y' is selected enter a number in the State Contract Number field.</p> <p>Edit Requisition: 1193</p> <p>Requisitioning BU Lucas County</p> <p>* Description Staples **10 CASES COPY PAPER**</p> <p>* State Contract - If yes, please Insert Contract Number Yes <input type="text" value="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="8">Total</td><td>3,499.00</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	Total								3,499.00
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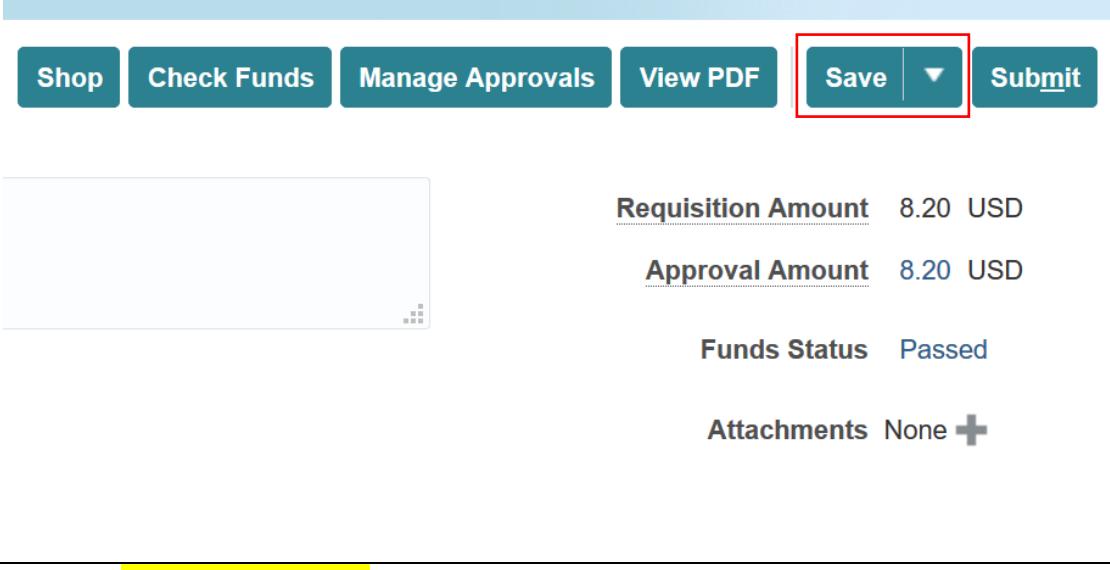
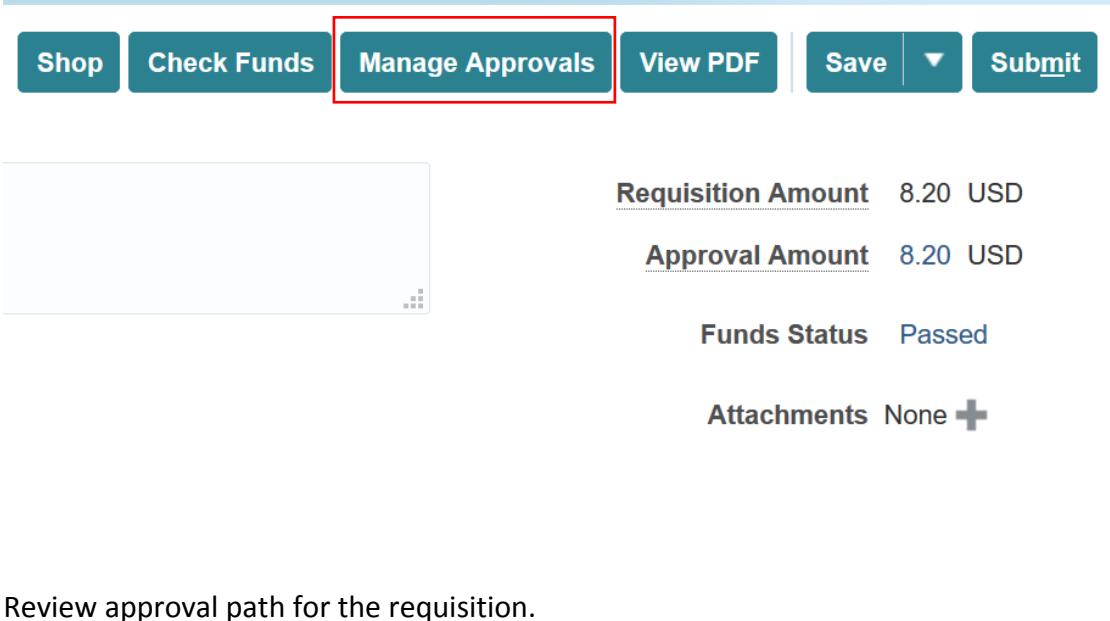


	<p>Edit Requisition: 1193</p> <p>Requisitioning BU Lucas County</p> <p>* Description Staples **10 CASES COPY PAPER**</p> <p>* State Contract - If yes, please insert Contract Number Yes</p> <p>State Contract Number A-12345678900</p> <p>* Sole Source - If yes please attach proof of Sole Source No</p> <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="8">Total</td><td>3,499.00</td></tr><tr><td colspan="8">Rows Selected 1 Columns Hidden 8</td><td></td></tr></tbody></table> <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	Total								3,499.00	Rows Selected 1 Columns Hidden 8								
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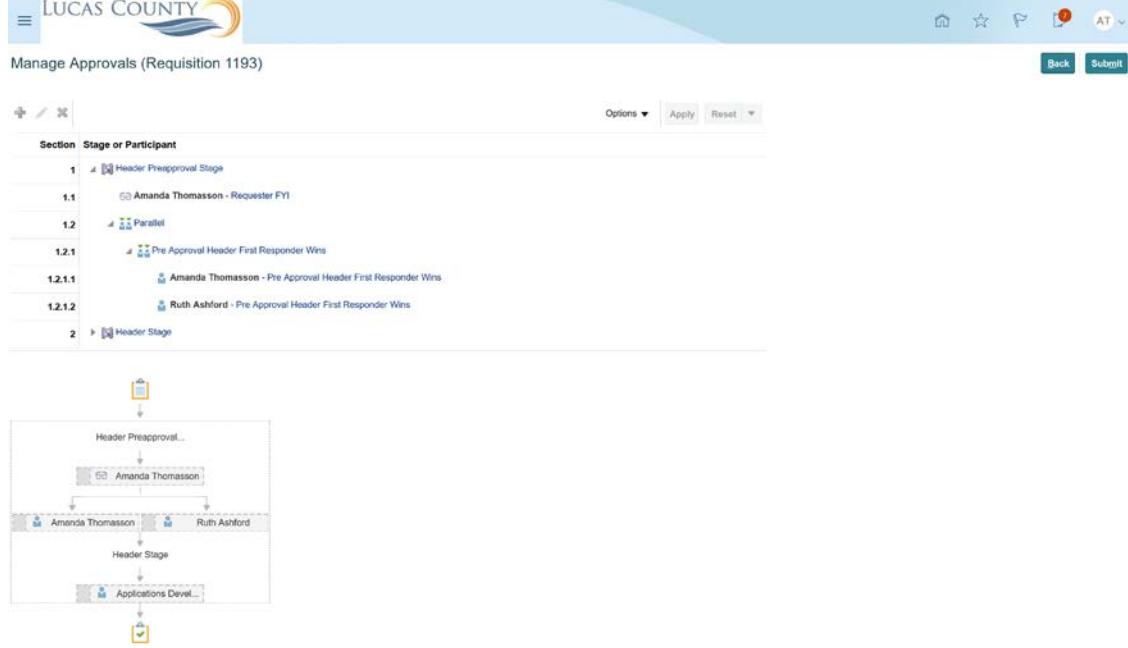
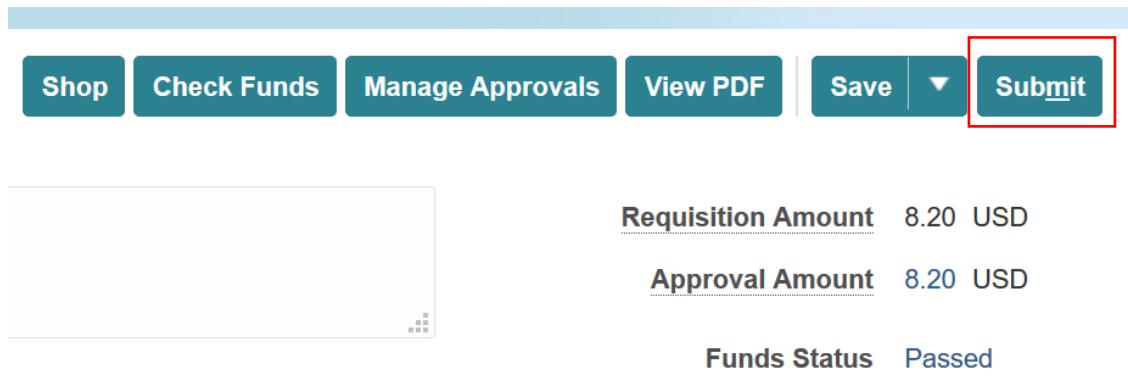


	
14	Click the Check Funds button.
	
15	Click the OK button.
16	Click the Save button.



	 <p>Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Passed Attachments None +</p>
17	<p>Click the Manage Approvals button.</p>  <p>Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Passed Attachments None +</p> <p>Review approval path for the requisition.</p>



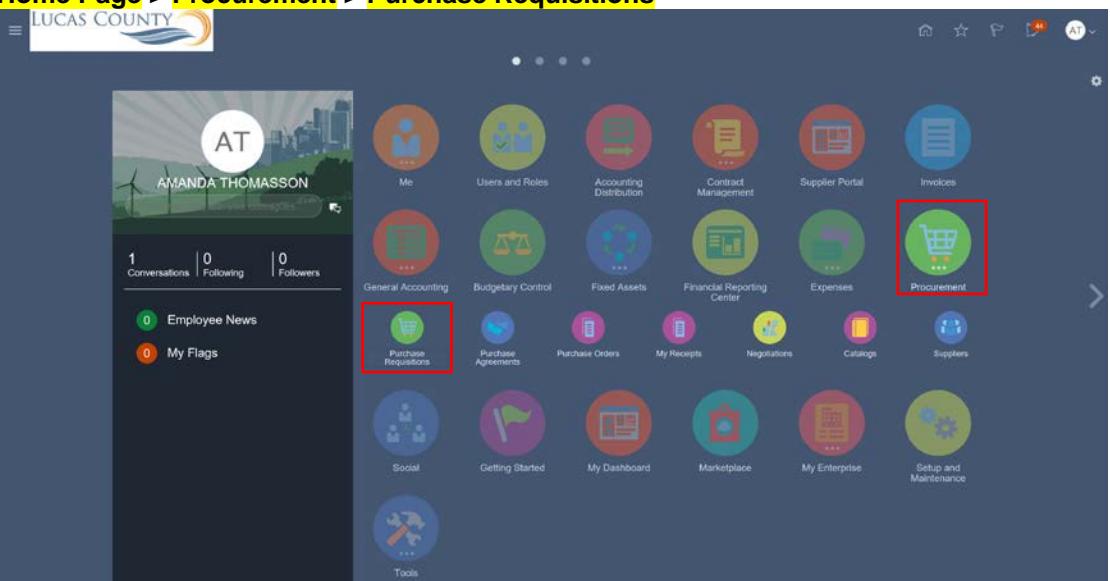
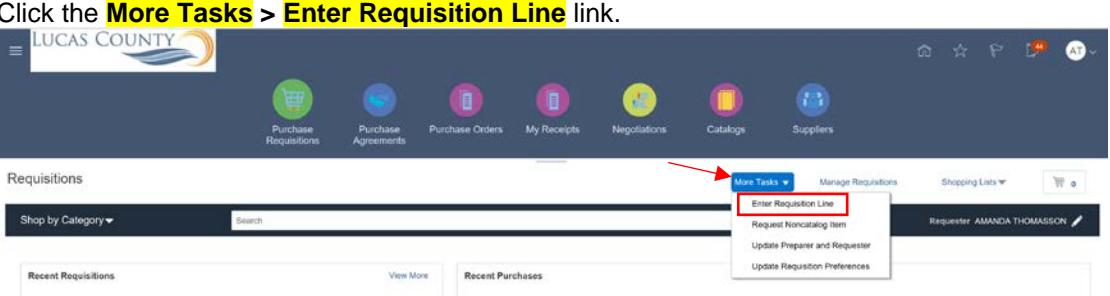
	
18	Click the Back button.
19	Click the Submit button.  <p>Requisition Amount 8.20 USD Approval Amount 8.20 USD Funds Status Passed Attachments None </p>
20	Click the OK button.



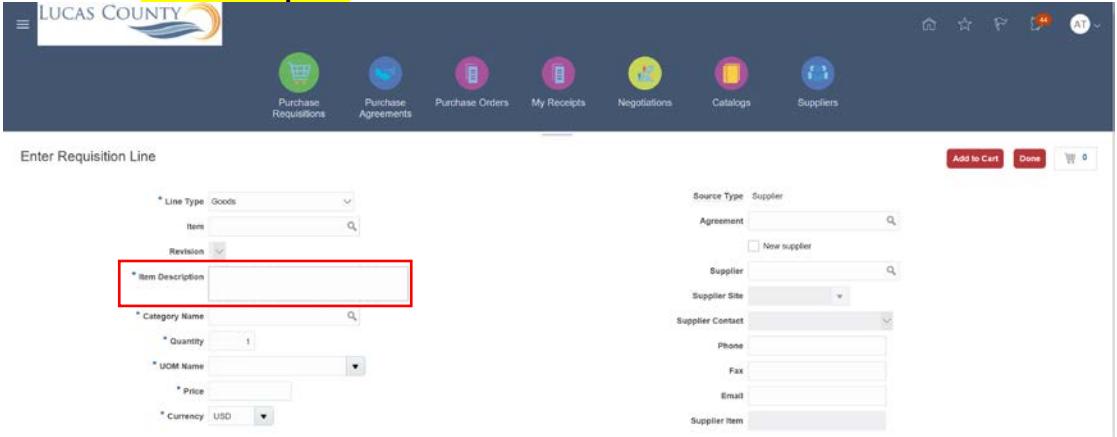
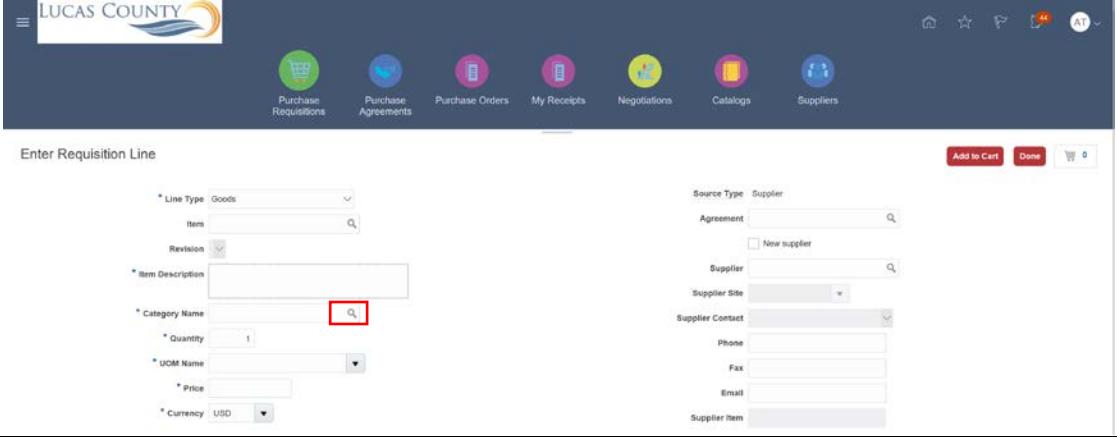
Create Requisition Line Entry for a Non-Catalog for Goods

Audience: Requesters, Buyers

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

Step	Action
1	Log into Oracle. Home Page > Procurement > Purchase Requisitions  A screenshot of the Oracle Home Page for Lucas County, Ohio. The page features a dark blue header with the Lucas County logo and a user profile for "AMANDA THOMASSON". Below the header is a grid of icons representing various business functions. The "Procurement" icon, which is a green circle with a white shopping cart, is highlighted with a red box. Another red box highlights the "Purchase Requisitions" icon in the bottom-left corner of the grid.
2	Click the More Tasks > Enter Requisition Line link.  A screenshot of the Purchase Requisitions page. At the top, there are several navigation links: Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, Catalogs, and Suppliers. Below these are sections for "Requisitions" and "Recent Purchases". A "More Tasks" dropdown menu is open, showing options like "Enter Requisition Line" (which is highlighted with a red box and has an arrow pointing to it), "Request Noncatalog Item", "Update Purchaser and Requester", and "Update Requisition Preferences".
3	Click the Line Type list.
4	Select the Goods list item from the drop down menu.



	<p>* Line Type Goods</p>
5	<p>Click in the Item Description field.</p> 
6	<p>Enter information into the Item Description field.</p>
7	<p>Click in the Category Name field.</p>
8	<p>Click the Search icon: by the Category Name field.</p> 
9	<p>Click in the Category Name field.</p>
10	<p>Enter Category Number into Category Name field if known</p>



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

The screenshot shows the 'Enter Requisition Line' screen with various fields for item details. A modal dialog box titled 'Search and Select: Category Name' is open. At the top right of this dialog is a button labeled 'Advanced', which is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and a 'Search' button.

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

The screenshot shows the 'Enter Requisition Line' screen with various fields for item details. A modal dialog box titled 'Search and Select: Category Name' is open. A dropdown menu labeled 'Category Name' is expanded, showing the option 'Does not equal' which is highlighted with a red box. The dialog also contains fields for 'Description' and 'Starts with', and a 'Search' button.

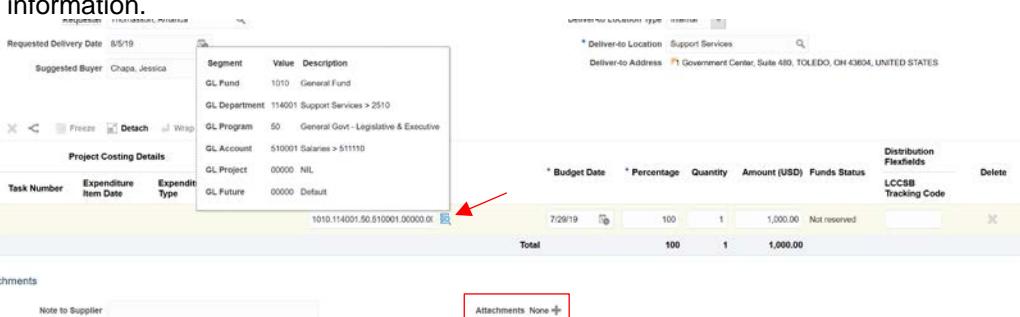
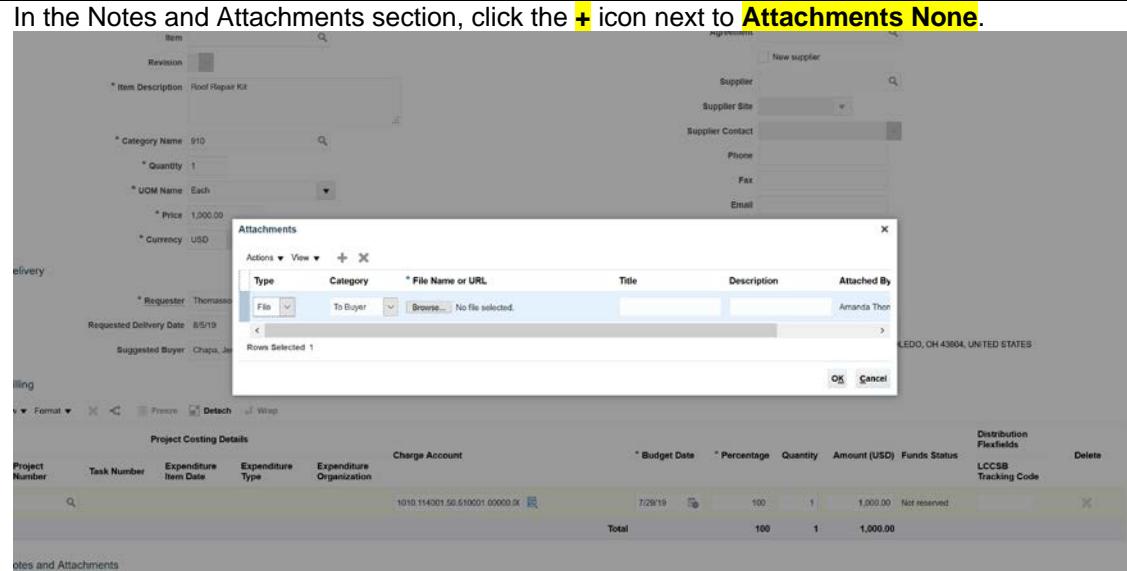
13 Enter information into the **Description** or **Category** fields.

14 Click the **Search** button.

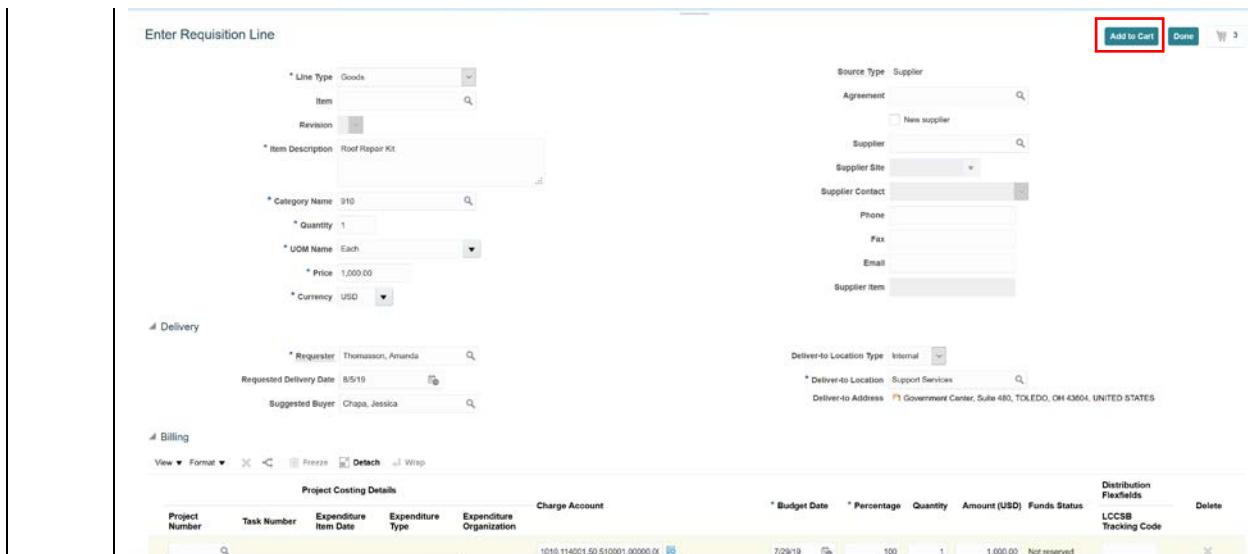
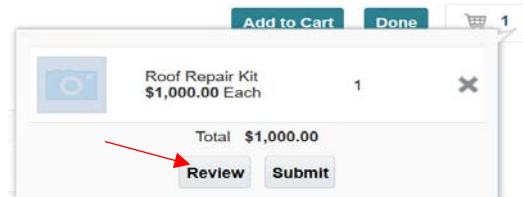
15 Make a selection from the search results list.

The screenshot shows the 'Enter Requisition Line' screen with various fields for item details. A modal dialog box titled 'Search and Select: Category Name' is open. The search results list shows an item '005 ABRASIVES' which is highlighted with a red box. The list also includes other categories like '010 ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES' and '015 ADDRESSING, COPYING, MIMOGRAF, AND SPIRIT DUPLICATING MACHINE SUPPLIES: CHE...'.



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



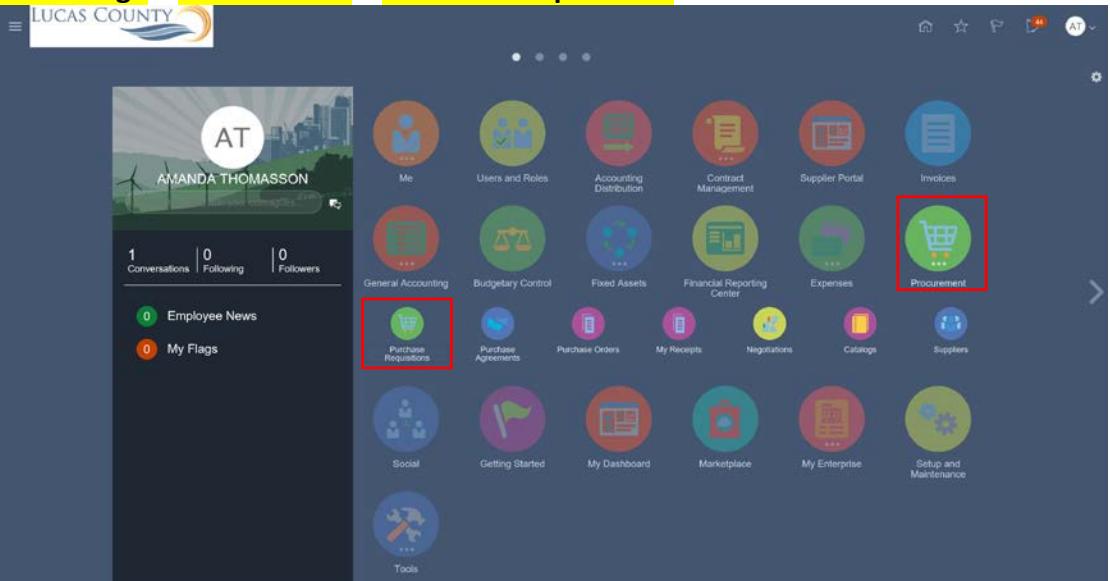
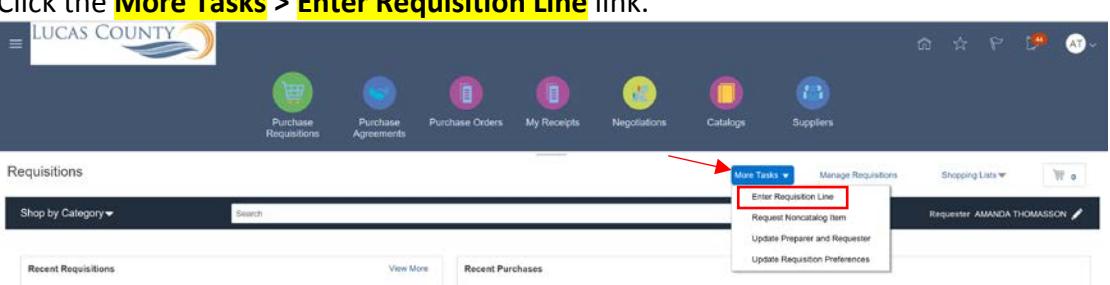
	
37	Click Shopping Cart icon and select Review .
	
38	Select Y/N option for *State Contract - If yes, please insert Contract Number .
39	Enter if 'Y' is selected enter a number in the State Contract Number field.
40	Select Y/N *Sole Source ("If yes please attach proof of Sole Source").
41	Select Y/N *Resolution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

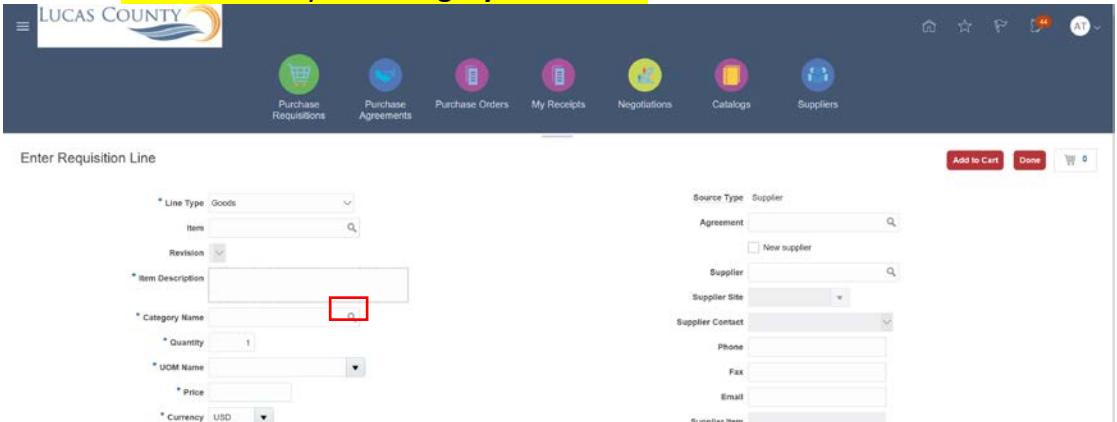


Create Requisition Line Entry for a Non-Catalog for Goods (Agency)

Audience: Agency Requesters

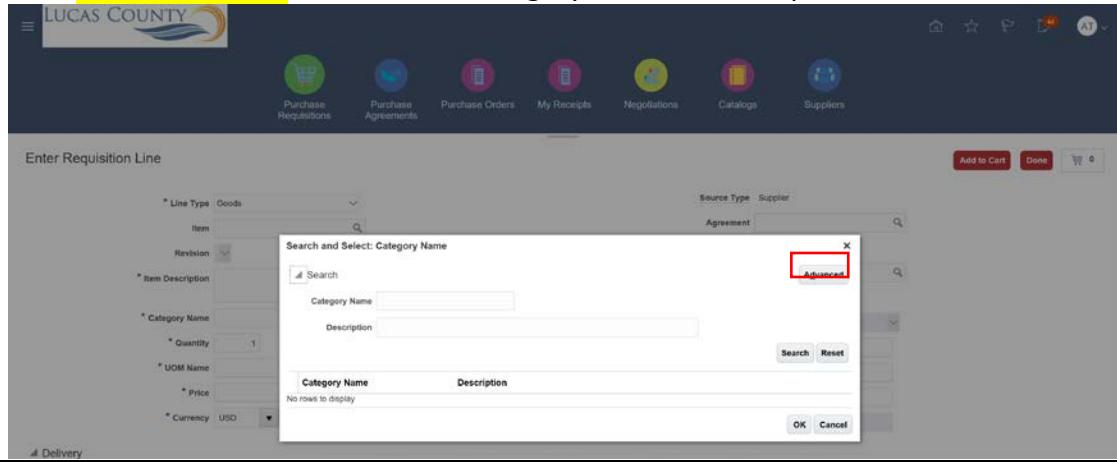
Purpose: An order is a formal authorization to purchase goods or services (amount based). Your purchasing department creates a purchase order, which a supplier receives. A purchase order can be tracked until you receive the goods or services. A requisition is a request for the goods or services. If approved, 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>Home Page > Procurement > Purchase Requisitions</p>  A screenshot of the Oracle Home Page. The top navigation bar shows "LUCAS COUNTY" and "AMANDA THOMASSON". Below the navigation is a sidebar with "1 Conversations", "0 Following", and "0 Followers". Under "Employee News", there are "0 Employee News" and "0 My Flags". The main content area features a grid of icons. Two icons are highlighted with red boxes: "Purchase Requisitions" in the General Accounting section and "Procurement" in the main grid. The "Procurement" icon is located in the top row, second column from the right.
2	<p>Click the More Tasks > Enter Requisition Line link.</p>  A screenshot of the Requisitions page. The top navigation bar shows "LUCAS COUNTY" and "AMANDA THOMASSON". Below the navigation is a toolbar with "Purchase Requisitions", "Purchase Agreements", "Purchase Orders", "My Receipts", "Negotiations", "Catalogs", and "Suppliers". The main content area shows "Requisitions" with "Recent Requisitions" and "Recent Purchases" sections. A "More Tasks" dropdown menu is open, showing "Enter Requisition Line" (which is highlighted with a red box and has an arrow pointing to it), "Request Noncatalog Item", "Update Payer and Requester", and "Update Requisition Preferences".
3	Click the Line Type list.
4	Select the Goods list item from the drop down menu.

	<p>* Line Type Goods</p>
5	<p>Click in the Item Description field.</p> 
6	<p>Enter information into the Item Description field.</p>
7	<p>Click in the Category Name field.</p>
8	<p>Click the Search icon: by the Category Name field.</p> 
9	<p>Click in the Description field.</p>
10	<p>Enter Category Number into Category Name field if known</p>

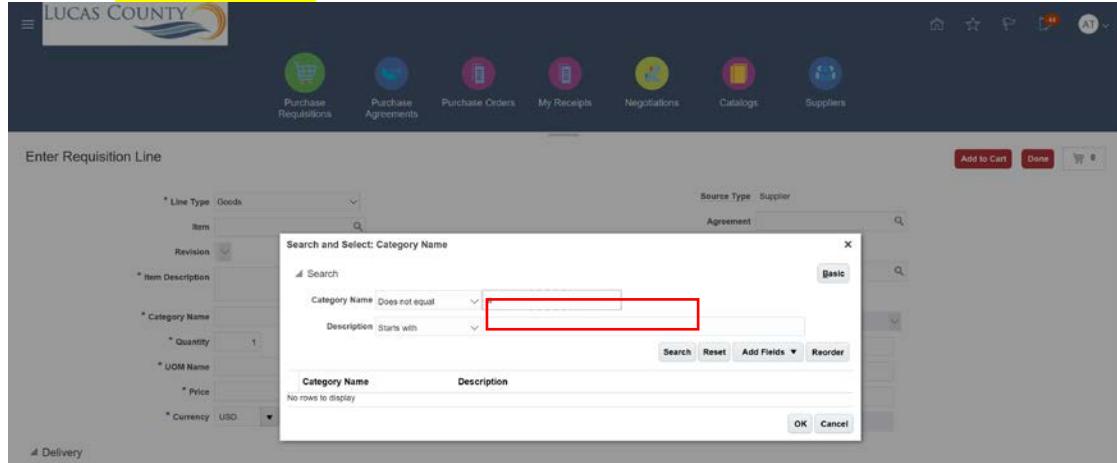


11 Click **Advance** button to search for Category Number/Description



The screenshot shows the 'Enter Requisition Line' screen with various input fields for a purchase requisition. A modal dialog box titled 'Search and Select: Category Name' is open. At the top right of this dialog is a button labeled 'Advanced', which is highlighted with a red box. The dialog contains fields for 'Category Name' and 'Description', and a 'Search' button.

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

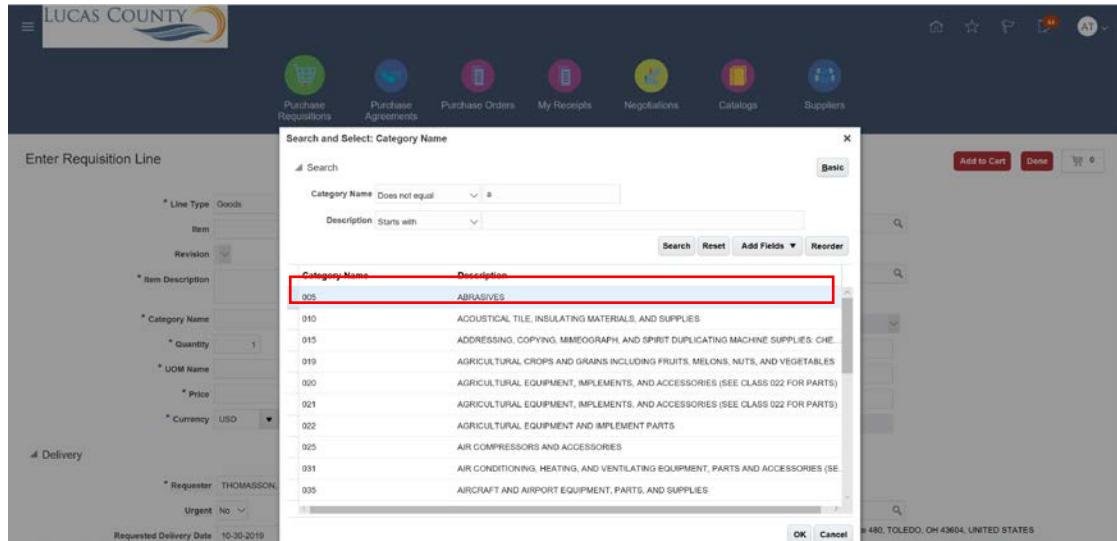


The screenshot shows the 'Enter Requisition Line' screen with various input fields. A modal dialog box titled 'Search and Select: Category Name' is open. A dropdown menu under the 'Search' section is highlighted with a red box, showing options like 'Does not equal' and 'Starts with'. The dialog also contains fields for 'Category Name' and 'Description', and a 'Search' button.

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

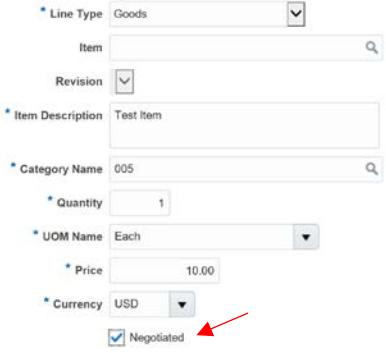
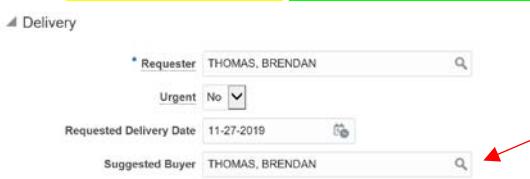
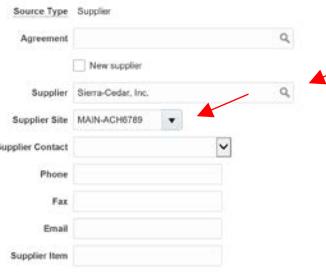
14 Click the **Search** button.

15 Make a selection from the search results list.



The screenshot shows the 'Enter Requisition Line' screen with various input fields. A modal dialog box titled 'Search and Select: Category Name' is open. The search results table shows a row for '005 ABRASIVES', which is highlighted with a red box. The dialog also contains fields for 'Category Name' and 'Description', and a 'Search' button.



16	Click the OK button.
17	Click in the Quantity field.
18	Enter information into the Quantity field.
19	Click in the UOM field.
20	Enter information into the UOM field.
21	Click the EA Quantity Each list item.
22	Click in the Price field.
23	Enter information into the Price field.
24	Click the Negotiated Check Box 
25	Enter Suggested Buyer (Suggested buyer is the buyer designated for the Department) 
26	Search and Select the Supplier and Supplier Site to whom the Purchase Order is to be issued 
27	Click the Charge Account 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 Attachments None.</p>
29	<p>In the Attachments window click the Type list.</p>
30	<p>Select the File list item.</p>
31	<p>Click the Category list.</p>
32	<p>Click to select the To Buyer list item.</p>
33	<p>Click the Browse button under *File Name or URL field.</p>
34	<p>Select a file for Attachment.</p>
35	<p>Click in the Title field.</p>
36	<p>Enter information into the Title field.</p>
37	<p>Click in the Description field and enter information into the Description field.</p>
38	<p>Click the Add to Cart button.</p>



Enter Requisition Line

<p>* Line Type: Goods</p> <p>Item: <input type="text"/></p> <p>Revision: <input type="text"/></p> <p>* Item Description: Roof Repair Kit</p> <p>* Category Name: 910</p> <p>* Quantity: 1</p> <p>* UOM Name: Each</p> <p>* Price: 1,000.00</p> <p>* Currency: 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>Delivery</p> <p>* Requester: Thomasson, Amanda <input type="text"/></p> <p>Requested Delivery Date: 8/5/19 <input type="text"/></p> <p>Suggested Buyer: Chapa, Jessica <input type="text"/></p>																													
<p>Deliver-to Location Type: Internal <input type="text"/></p> <p>* Deliver-to Location: Support Services <input type="text"/></p> <p>Deliver-to Address: 171 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES</p>																													
<p>Billing</p> <p>View ▾ Format ▾ <input type="button"/> Freeze <input type="button"/> Detach <input type="button"/> Wrap</p>																													
<p>Project Costing Details</p> <table border="1"> <thead> <tr> <th>Project Number</th> <th>Task Number</th> <th>Expenditure Item Date</th> <th>Expenditure Type</th> <th>Expenditure Organization</th> <th>Charge Account</th> <th>* Budget Date</th> <th>* Percentage</th> <th>Quantity</th> <th>Amount (USD)</th> <th>Funds Status</th> <th>Distribution Flexfields</th> <th>LCSSB Tracking Code</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1010.114021.50.510001.00000.00</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>7/09/19</td> <td></td> <td>100</td> <td>1,000.00</td> <td>Not reserved</td> <td></td> <td></td> <td>X</td> </tr> </tbody> </table>		Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields	LCSSB Tracking Code	Delete	1010.114021.50.510001.00000.00						7/09/19		100	1,000.00	Not reserved			X
Project Number	Task Number	Expenditure Item Date	Expenditure Type	Expenditure Organization	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields	LCSSB Tracking Code	Delete																
1010.114021.50.510001.00000.00						7/09/19		100	1,000.00	Not reserved			X																

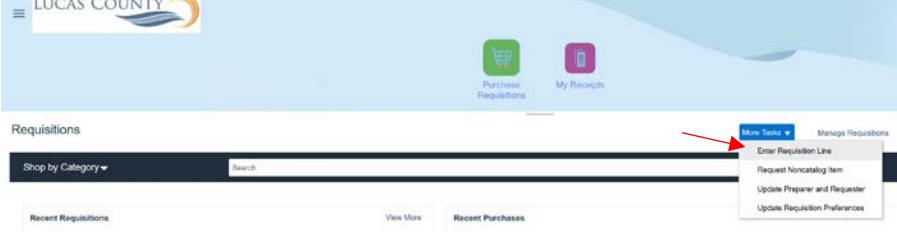
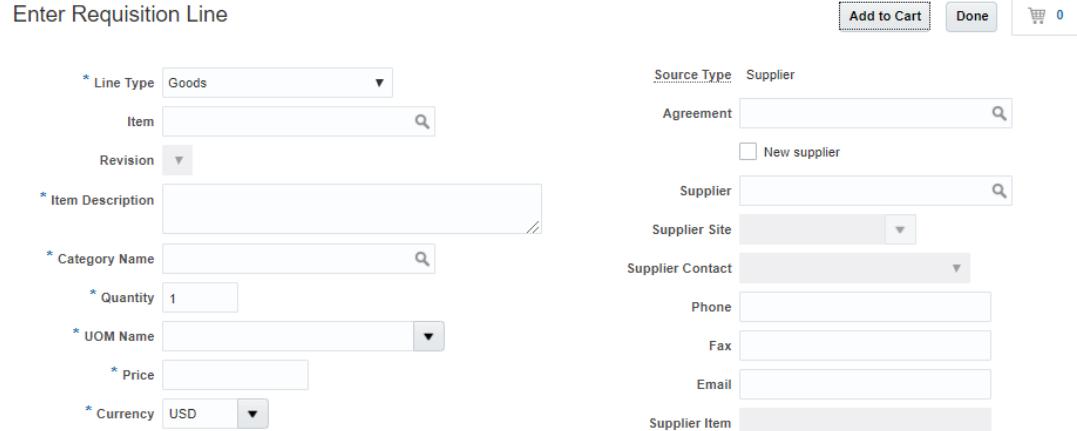
39	Click Shopping Cart icon and select Review .
	
40	Select Y/N option for *State Contract - If yes, please insert Contract Number .
41	Enter if 'Y' is selected enter a number in the State Contract Number field.
42	Select Y/N *Sole Source ("If yes please attach proof of Sole Source").
43	Select Y/N *Resolution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



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

Audience: Requesters

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

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

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

* Line Type Amount Based

|

The fields change based on the Line Type of Amount Based.

Enter Requisition Line

Add to Cart Done

0

* Line Type Amount Based	Source Type Supplier
* Item Description	Agreement
* Category Name	<input type="checkbox"/> New supplier
* Amount	Supplier
* Currency USD	Supplier Site
	Supplier Contact
	Phone
	Fax
	Email
	Supplier Item

4 Click in the **Item Description** field and enter a description.

5 Category information is required. Click in the **Category Name** field and make a selection using the **Search** icon.

6 Categories have names and longer descriptions. If the Category Name is unknown, you can use an **Advanced** search option to look up by known information. Results will display in a list immediately below the **Description** field.

Enter Requisition Line

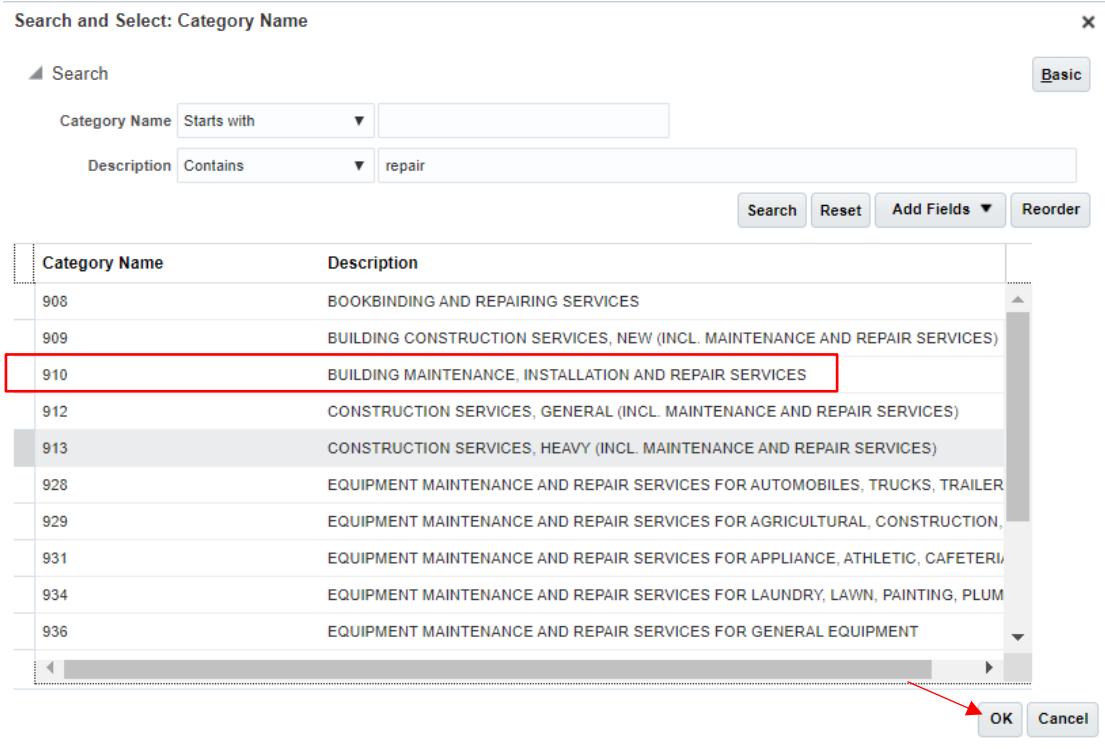
Add to Cart Done

Search and Select: Category Name

Advanced

Search	Search	Reset
Category Name	Description	
Category Name Description		

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

	
8	<p>The search results will populate in a list below. Make a selection and click the OK button.</p> 
9	<p>The category information populates the requisition line.</p> <p>Note: You cannot edit the quantity for fixed price services lines for goods or services billed by a currency amount because quantity is not applicable to these types of lines.</p>
10	<p>Click in the Amount field and enter the dollar amount information.</p>
11	<p>The Currency field defaults to USD.</p>



<p>Enter Requisition Line</p>	
12	Click the Add to Cart button.
13	Click Shopping Cart icon and select Review .
14	Answer the required questions using the dropdown buttons.



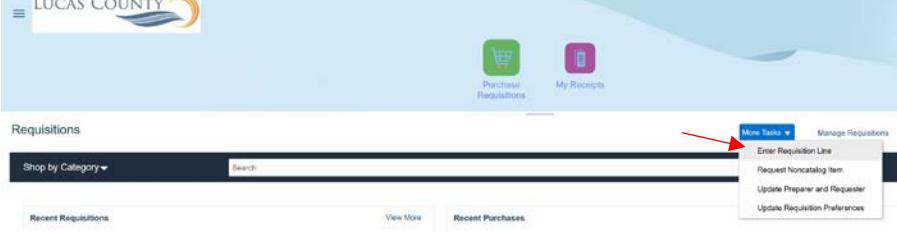
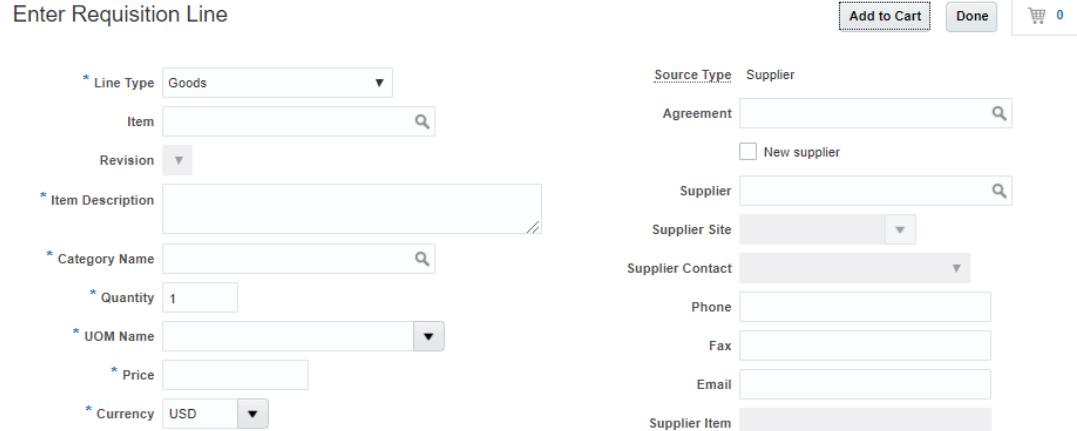
Edit Requisition: 1163																															
<p>Requisitioning BU Lucas County</p> <p>* Description Roof Repair Services</p> <p>Justification</p> <p>* State Contract - If yes, please insert Contract Number</p> <p>State Contract Number</p> <p>* Sole Source - If yes please attach proof of Sole Source</p> <p>* Resolution Attached</p> <p>* Will Services be performed on Lucas County property?</p> <p>* Does this purchase require the attachment of the LCIS Checklist?</p> <p>Requisition Lines</p> <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>5,000.00</td><td>US</td><td>5,000.00</td><td>Not reserved</td><td>X</td></tr><tr><td colspan="10">Total 5,000.00</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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<p>Select Y/N option for *State Contract - If yes, please insert Contract Number.</p> <p>15 Enter if 'Y' is selected enter a number in the State Contract Number field.</p> <p>16 Select Y/N *Sole Source ("If yes please attach proof of Sole Source").</p> <p>17 Select Y/N *Resolution Attached.</p> <p>18 Select Y/N *Will Services be performed on Lucas County property?</p> <p>19 Select Y/N *Does this purchase require the attachment of the LCIS Checklist? Note: If yes, please attach in the Attachments section below.</p> <p>20 Click the Check Funds button located at the top of the window.</p> <p>21 A message will display regarding failure or success of the funds check. Click the OK button to acknowledge.</p> <p>22 Click the Manage Approvals button to view the approvers.</p> <p>23 Click the Back button.</p> <p>24 Click the Submit button.</p> <p>25 Click the OK button.</p> <p>26 Click the Home button.</p>																															



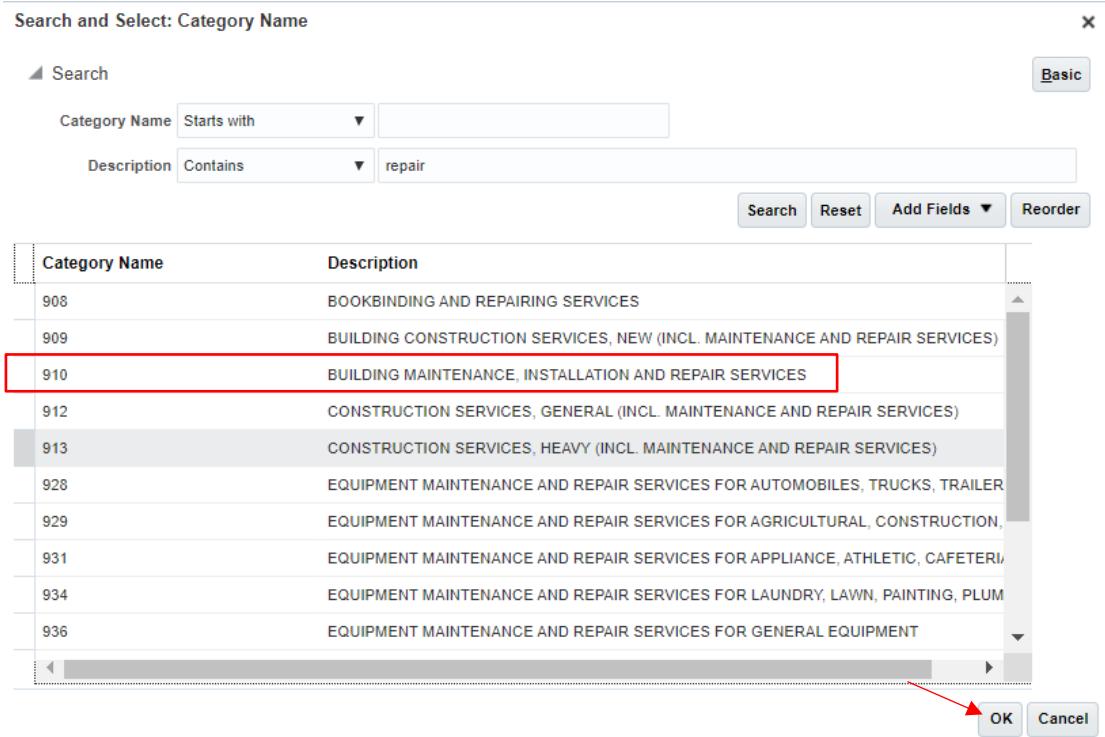
Create Requisition Line Entry for a Non-Catalog Requisition for Services

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

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

	 <p>The search results will populate in a list below. Make a selection and click the OK button.</p>
8	 <p>The category information populates the requisition line.</p> <p>Note: You cannot edit the quantity for fixed price services lines for goods or services billed by a currency amount because quantity is not applicable to these types of lines.</p>
9	
10	Click in the Amount field and enter the dollar amount information.
11	The Currency field defaults to USD.



<p>Enter Requisition Line</p>	
12	Click the Add to Cart button.
13	Click Shopping Cart icon and select Review .
14	Answer the required questions using the dropdown buttons.



Edit Requisition: 1163																																																		
<p style="text-align: right;"> <input type="button" value="Shop"/> <input type="button" value="Check Funds"/> <input type="button" value="Manage Approvals"/> <input type="button" value="View PDF"/> <input type="button" value="Save"/> <input type="button" value="Submit"/> </p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 10%;">Requisitioning BU</td> <td style="width: 40%;">Lucas County</td> <td style="width: 50%;">Justification</td> </tr> <tr> <td>* Description</td> <td colspan="2">Roof Repair Services</td> </tr> <tr> <td>* State Contract - If yes, please insert Contract Number</td> <td colspan="2"> <input type="text"/> <input type="button" value="State Contract Number"/> </td> </tr> <tr> <td>* Sole Source - If yes please attach proof of Sole Source</td> <td colspan="2"> <input type="text"/> <input type="button" value="Resolution Attached"/> </td> </tr> <tr> <td>* Will Services be performed on Lucas County property?</td> <td colspan="2"> <input type="text"/> <input type="button" value="Yes"/> </td> </tr> <tr> <td>* Does this purchase require the attachment of the LCIS Checklist?</td> <td colspan="2"> <input type="text"/> <input type="button" value="Search..."/> </td> </tr> <tr> <td colspan="3"> Requisition Lines <table border="1" style="width: 100%; border-collapse: collapse;"> <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>1</td> <td></td> <td>5,000.00 US</td> <td>5,000.00</td> <td>Not reserved</td> <td><input type="button" value="X"/></td> </tr> <tr> <td colspan="2"></td> <td>Total</td> <td colspan="6">5,000.00</td> </tr> </tbody> </table> </td> </tr> </table>		Requisitioning BU	Lucas County	Justification	* Description	Roof Repair Services		* State Contract - If yes, please insert Contract Number	<input type="text"/> <input type="button" value="State Contract Number"/>		* Sole Source - If yes please attach proof of Sole Source	<input type="text"/> <input type="button" value="Resolution Attached"/>		* Will Services be performed on Lucas County property?	<input type="text"/> <input type="button" value="Yes"/>		* Does this purchase require the attachment of the LCIS Checklist?	<input type="text"/> <input type="button" value="Search..."/>		Requisition Lines <table border="1" style="width: 100%; border-collapse: collapse;"> <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>1</td> <td></td> <td>5,000.00 US</td> <td>5,000.00</td> <td>Not reserved</td> <td><input type="button" value="X"/></td> </tr> <tr> <td colspan="2"></td> <td>Total</td> <td colspan="6">5,000.00</td> </tr> </tbody> </table>			Line	Description	Category Name	* Quantity	* UOM Name	* Price	* Amount	Amount (USD)	Funds Status	Delete	1	Roof Repair Service 910		1		5,000.00 US	5,000.00	Not reserved	<input type="button" value="X"/>			Total	5,000.00					
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21	Enter Suggested Buyer (Suggested buyer is the buyer designated for the Department) <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2"> <input type="button" value="Delivery"/> </td> </tr> <tr> <td colspan="2"> * Requester: THOMAS, BRENDAN <input type="button" value="Search"/> </td> </tr> <tr> <td colspan="2"> Urgent: No <input type="checkbox"/> </td> </tr> <tr> <td colspan="2"> Requested Delivery Date: 11-27-2019 <input type="button" value="Search"/> </td> </tr> <tr> <td colspan="2"> Suggested Buyer: THOMAS, BRENDAN <input type="button" value="Search"/> </td> </tr> </table>	<input type="button" value="Delivery"/>		* Requester: THOMAS, BRENDAN <input type="button" value="Search"/>		Urgent: No <input type="checkbox"/>		Requested Delivery Date: 11-27-2019 <input type="button" value="Search"/>		Suggested Buyer: THOMAS, BRENDAN <input type="button" value="Search"/>																																								
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22	Search and Select the Supplier and Supplier Site to whom the Purchase Order is to be issued																																																	



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

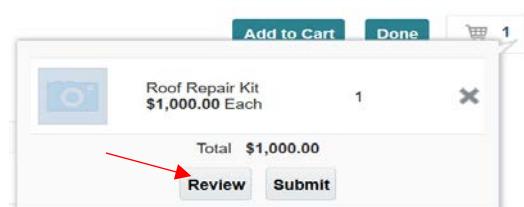


34 Click the **Add to Cart** button.

Enter Requisition Line

The screenshot shows the 'Enter Requisition Line' interface. At the top right, there are buttons for 'Add to Cart' (highlighted with a red box), 'Done', and a search icon. The main area contains fields for Line Type (Goods), Item (Roof Repair Kit), Revision, Item Description, Category Name (910), Quantity (1), UOM Name (Each), Price (1,000.00), and Currency (USD). To the right, there are sections for Source Type (Supplier), Agreement, Supplier (New supplier), Supplier Site, Supplier Contact, Phone, Fax, Email, and Supplier Item. Below these are sections for Delivery (Requester, Delivery Date, Suggested Buyer) and Billing (Project Costing Details, Charge Account, Budget Date, Percentage, Quantity, Amount (USD), Funds Status, Distribution Flexfields, LCCSB Tracking Code). A status bar at the bottom shows the total amount as \$1,000.00 and the date as 7/29/19.

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



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

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

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

39 Select Y/N ***Resolution Attached**.

40 Select Y/N ***Will Services be performed on Lucas County property?**

41 Click the **Submit** button.

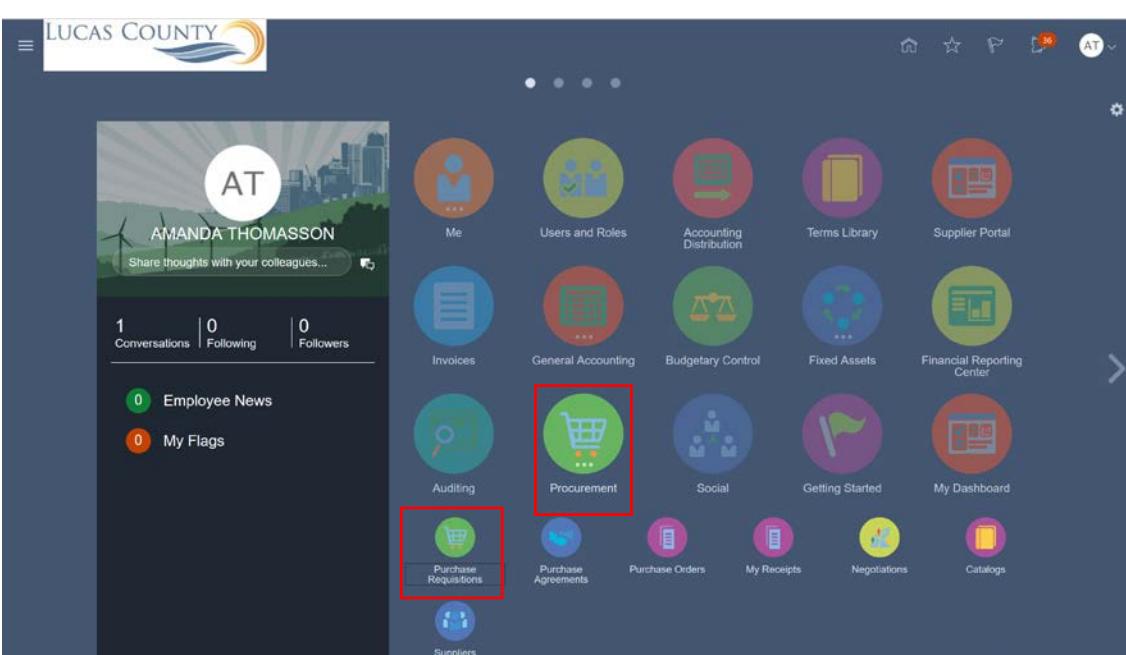
42 Click the **OK** button.



Create Requisition for Goods Referencing a CPA

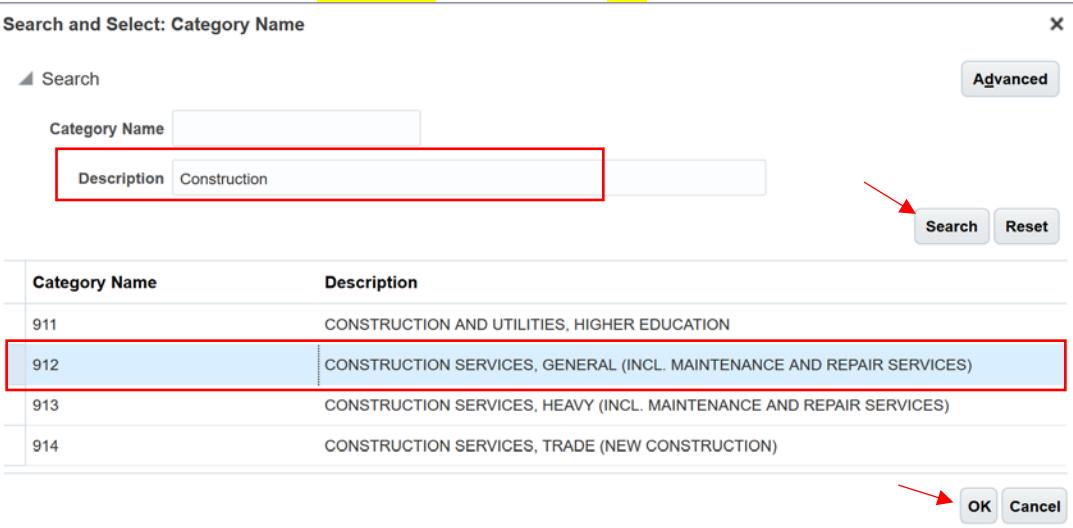
Audience: Requesters, Buyers, Contract Administrators

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

Step	Action
1	Login to Oracle. Home Page -> Procurement -> Purchase Requisitions  A screenshot of the Oracle Home Page for Lucas County, Ohio. The page features a dark blue header with the Lucas County logo and a user profile for "AMANDA THOMASSON". Below the header is a banner with "1 Conversations", "0 Following", and "0 Followers". On the left, there are "Employee News" and "My Flags". The main content area contains a grid of icons representing various Oracle modules. The "Procurement" icon, which is green with a shopping cart symbol, is highlighted with a red box. Other icons include "Me", "Users and Roles", "Accounting Distribution", "Terms Library", "Supplier Portal", "Invoices", "General Accounting", "Budgetary Control", "Fixed Assets", "Financial Reporting Center", "Auditing", "Social", "Getting Started", "My Dashboard", "Purchase Requisitions" (which is also highlighted with a red box), "Purchase Agreements", "Purchase Orders", "My Receipts", "Negotiations", and "Catalogs".
2	Under Request Forms , select Contract Purchase – Goods .

Request Forms

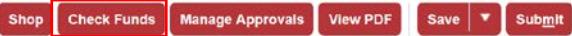
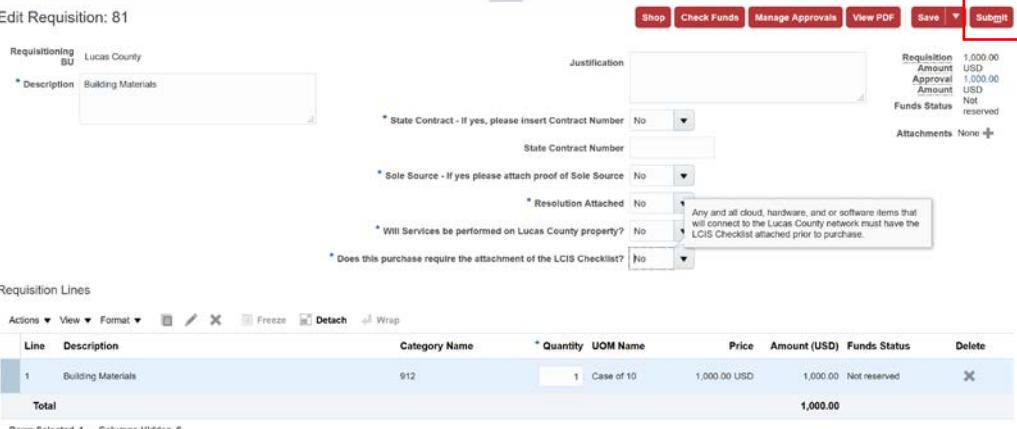
- Contract Purchase - Goods
- Contract Purchase -Services

3	Click in the Item Description field.										
4	Enter the Item Description information into the Item Description field.										
5	Click in the Category Name search icon.										
6	Enter information into the Category description field and click the Search button.										
7	Select category from the Category list and click OK .										
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914	CONSTRUCTION SERVICES, TRADE (NEW CONSTRUCTION)										
8	Enter a Quantity .										
9	Click in the UOM Name field and select Each.										
10	Click in the Price field and enter a price.										
11	Click in the Currency field. Currency should default to USD.										
12	Click in the Agreement field and enter the Agreement Number information or use the Search function to find the Agreement.										
13	The Agreement will display. Select the line for the Agreement and click the Ok button.										



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



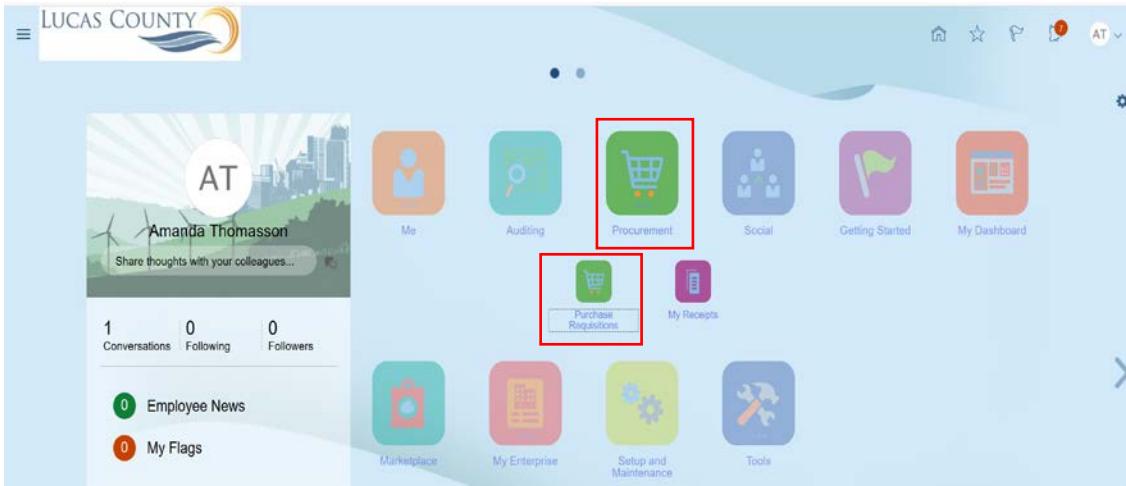
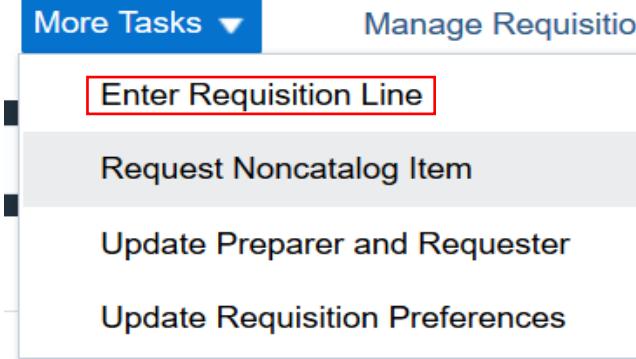
19	Select Y/N *Resolution Attached . (If yes attach resolution).
20	Select Y/N *Will Services be performed on Lucas County property?
21	Select Y/N *Does this purchase require the attachment of the LCIS Checklist? (Any and all cloud, hardware, and or software items that will connect to the Lucas County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

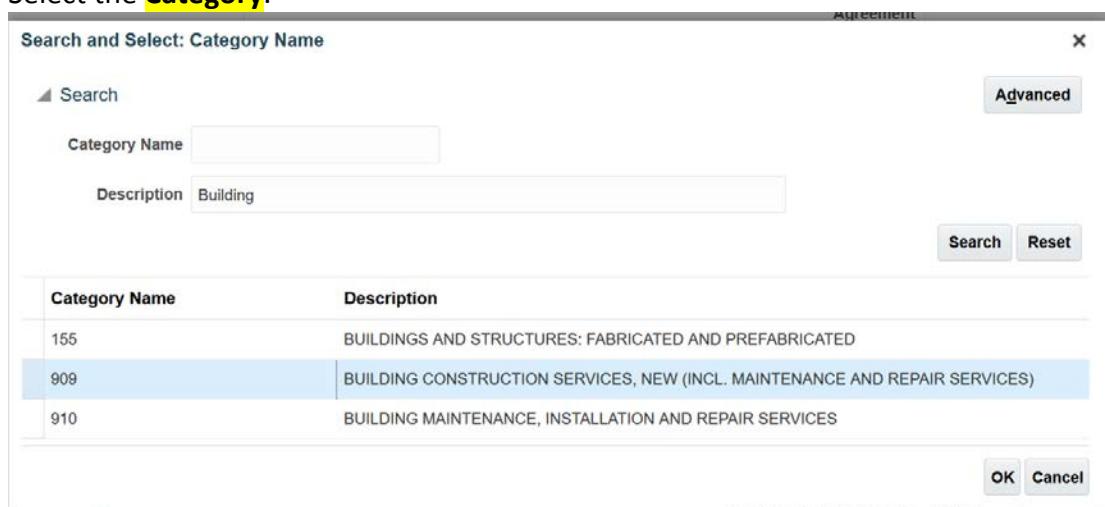
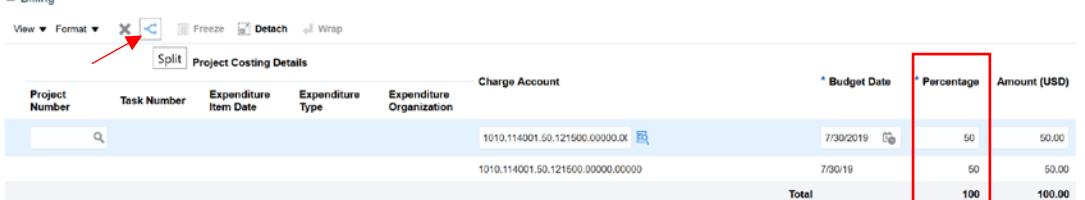
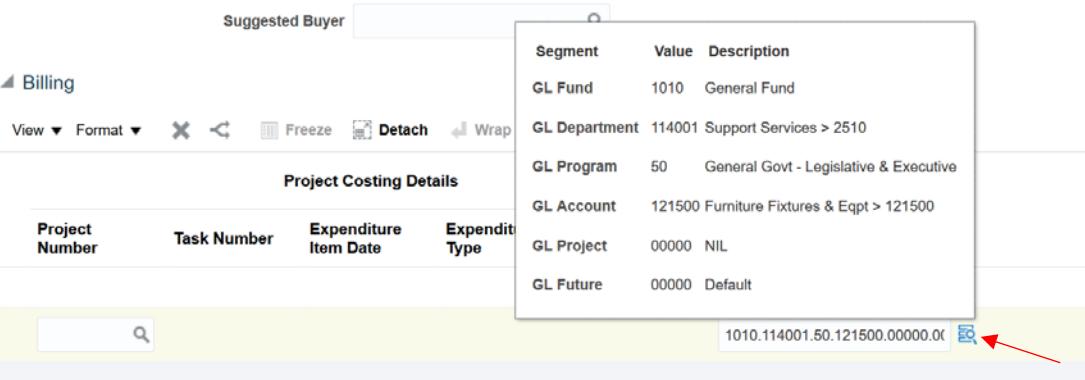


Create Requisition with Multiple Charge Accounts

Audience: Requesters

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

Step	Action
1	<p>Log into Oracle.</p> <p>Home Page > Procurement > Purchase Requisitions > More Tasks</p>  A screenshot of the Oracle Home Page for Lucas County, Ohio. The page features a banner with a sunburst and water graphic, the user's name "Amanda Thomasson", and a "Share thoughts with your colleagues..." button. Below the banner are statistics: 1 Conversation, 0 Following, and 0 Followers. The main navigation bar includes icons for Me, Auditing, Procurement (which is highlighted with a red box), Social, Getting Started, and My Dashboard. A "More Tasks" dropdown menu is open, showing options: Enter Requisition Line (which is highlighted with a red box), Request Noncatalog Item, Update Preparer and Requester, and Update Requisition Preferences.
2	<p>Click the Enter Requisition Line link.</p>  A screenshot of the "More Tasks" dropdown menu from the previous step. The "Enter Requisition Line" link is highlighted with a red box.
3	<p>Click the Line Type list.</p>
4	<p>Click the Amount Based from the drop down list.</p>
5	<p>Click in the Item Description field.</p>

6	Enter information into the Item Description field.
7	Click the Search: Category icon and enter information into the Description field.
8	Click the Search: Category Name button.
9	Enter information into the Description field.
10	Click the Search button.
11	Select the Category .
	
12	Click the OK button.
13	Click in and enter information into the Amount field.
14	Enter 50 into the Billing *Percentage field.
15	Click the Split icon under the Billing section. This will allow you to split the cost by percentage or amount among multiple charge accounts.
	
16	Select the second inserted row and click the *Charge Account icon.
	



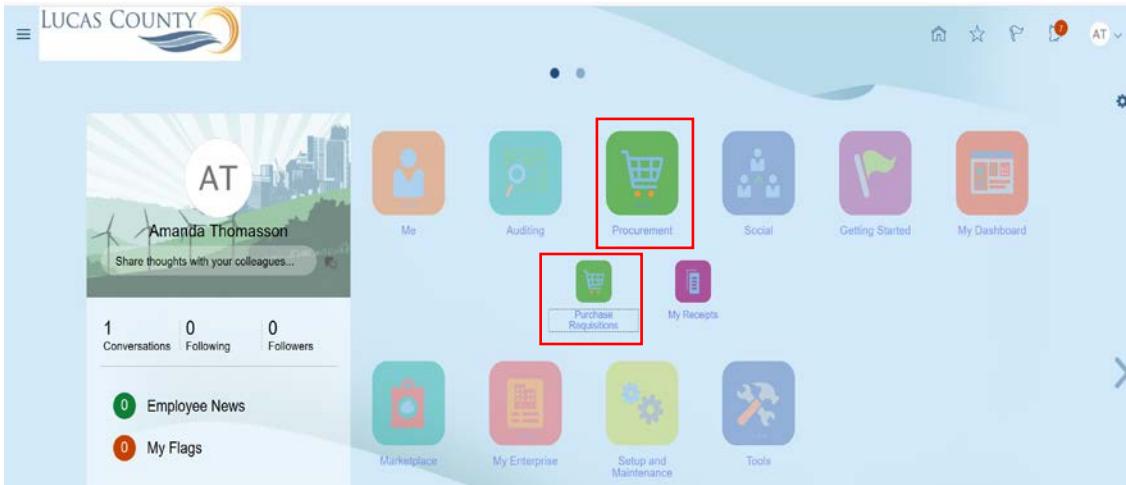
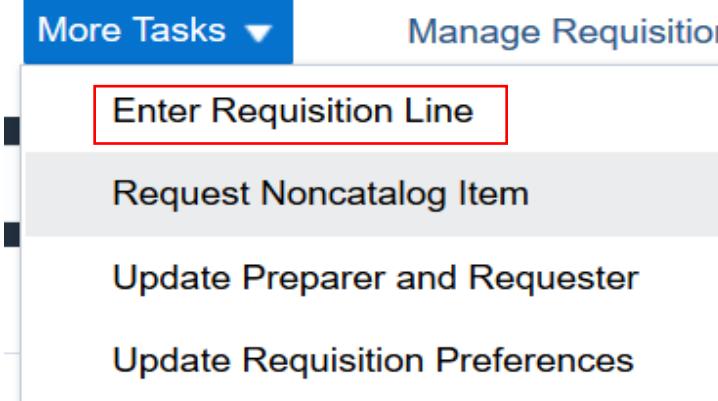
17	Enter applicable Charge Account segments.
18	Click Add to Cart button.
19	Click the Shopping Cart and select Review to go to the Edit Requisition page.
20	Select Y/N option for *State Contract - If yes, please insert Contract Number.
21	Enter if 'Y' is selected enter a number in the State Contract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

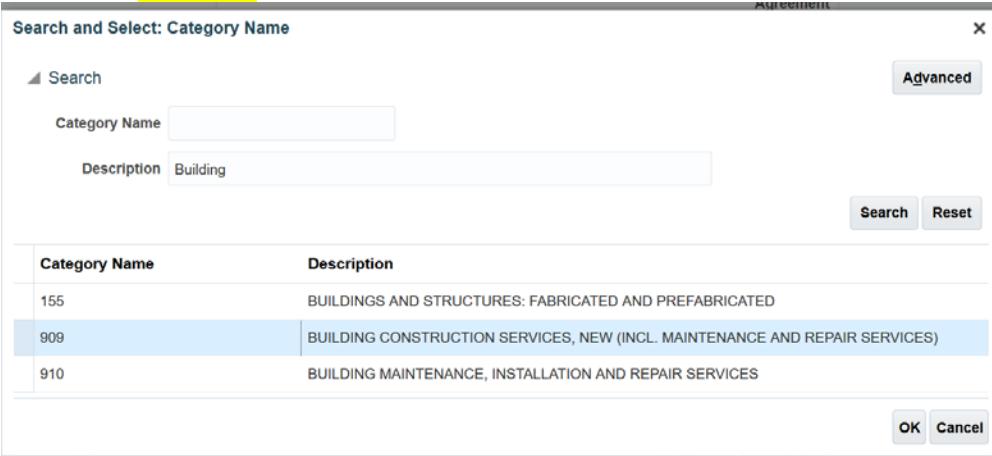


Create Requisition with Multiple Requisition Lines

Audience: Requester, Buyer

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

Step	Action
1	<p>Log into Oracle.</p> <p>Home Page > Procurement > Purchase Requisitions > More Tasks</p>  A screenshot of the Oracle Home Page. At the top, there is a banner with a user profile picture and the text "Share thoughts with your colleagues...". Below the banner, there are several icons: "Me", "Auditing", "Procurement" (which is highlighted with a red box), "Social", "Getting Started", and "My Dashboard". In the center, there is a "More Tasks" dropdown menu with the following options: "Enter Requisition Line" (which is highlighted with a red box), "Request Noncatalog Item", "Update Preparer and Requester", and "Update Requisition Preferences".
2	<p>Click the Enter Requisition Line link.</p>  A screenshot of the "More Tasks" dropdown menu from the previous step. The "Enter Requisition Line" link is highlighted with a red box.
3	Select Goods or Amount Based' from the Line Type drop down.
4	Enter Item Description .
5	Click the Search: Category icon and enter information into the Description field.
6	Click the Search: Category Name button.

7	Enter information into the Description field.								
8	Click the Search button.								
9	Select the Category .								
	 <table border="1" data-bbox="313 633 1305 802"> <thead> <tr> <th>Category Name</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>155</td> <td>BUILDINGS AND STRUCTURES: FABRICATED AND PREFABRICATED</td> </tr> <tr style="background-color: #d9e1f2;"> <td>909</td> <td>BUILDING CONSTRUCTION SERVICES, NEW (INCL. MAINTENANCE AND REPAIR SERVICES)</td> </tr> <tr> <td>910</td> <td>BUILDING MAINTENANCE, INSTALLATION AND REPAIR SERVICES</td> </tr> </tbody> </table>	Category Name	Description	155	BUILDINGS AND STRUCTURES: FABRICATED AND PREFABRICATED	909	BUILDING CONSTRUCTION SERVICES, NEW (INCL. MAINTENANCE AND REPAIR SERVICES)	910	BUILDING MAINTENANCE, INSTALLATION AND REPAIR SERVICES
Category Name	Description								
155	BUILDINGS AND STRUCTURES: FABRICATED AND PREFABRICATED								
909	BUILDING CONSTRUCTION SERVICES, NEW (INCL. MAINTENANCE AND REPAIR SERVICES)								
910	BUILDING MAINTENANCE, INSTALLATION AND REPAIR SERVICES								
10	Enter a Quantity .								
11	Select a UOM name = Each.								
12	Click in the Price field and add Price.								
13	Click the Add to Cart button.								
14	Select 'Goods' from the Line Type drop down.								
15	Enter Item Description .								
16	Select a Category Name .								
17	Enter a Quantity .								
18	Select a UOM name = Each.								
19	Click in the Price field and add Price.								
20	Click the Add to Cart button.								
21	Click the Shopping Cart Icon.								
22	Click Review .								
23	Select Y/N option for *State Contract - If yes, please insert Contract Number .								
24	Enter if 'Y' is selected enter a number in the State Contract Number field.								
25	Select Y/N *Sole Source ("If yes please attach proof of Sole Source").								
26	Select Y/N *Resolution Attached .								
27	Select Y/N *Will Services be performed on Lucas County property?								
28	Select one of the Requisition lines .								
29	Click the Actions menu.								
31	Select the Duplicate option.								

Requisition Lines	
<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Actions View Format X Freeze Detach Wrap </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; display: inline-block;"> Duplicate Edit Delete View Punchout Cart </div>	
	Total
32	Select the duplicated row and click the Actions menu.
33	Select the Edit option.
34	Click the Item Description field and modify description.
35	Click in the Price field and modify price.
36	Click the OK button.
37	Click the Search: Deliver-to Location icon.
	<div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> Deliver-to Location Type Internal ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> * Deliver-to Location Support Services Search </div>
38	Click in the Name field and type a partial name.
39	Click in the Search button.
40	Select the Deliver-to Location in the Name cell.
41	Click the OK button.
42	Click the Save button.



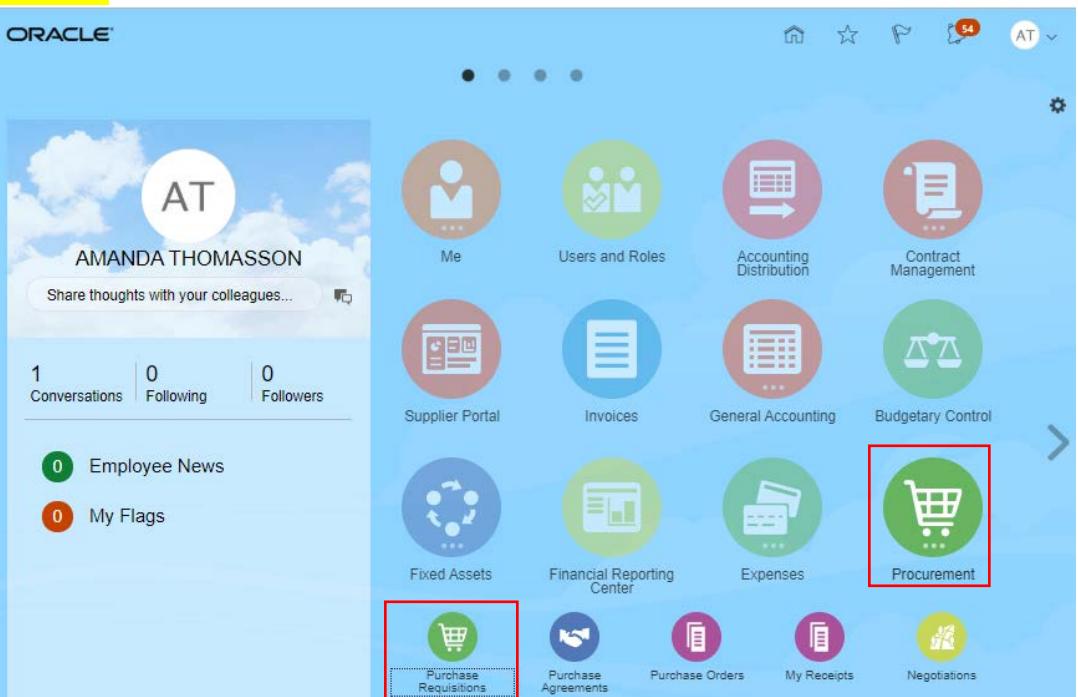
43	Click the Check Funds button. 
44	Click the OK button.
45	Click the Manage Approvals button. 
46	Click the Back button.
47	Click the Submit button.
48	Click the OK button.

Duplicate Requisition

Audience: Requester

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

NOTE: Punchout requisitions cannot be duplicated.

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



A screenshot of the Oracle Purchase Requisitions interface. The top navigation bar includes links for Purchase Requisitions, Purchase Agreements, Purchase Orders, My Receipts, Negotiations, and Catalogs. Below the navigation is a section titled "Requisitions" with a "Manage Requisitions" button highlighted with a red box. A search bar with "Shop by Category" and a "Search" button is also visible.

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.

Manage Requisitions

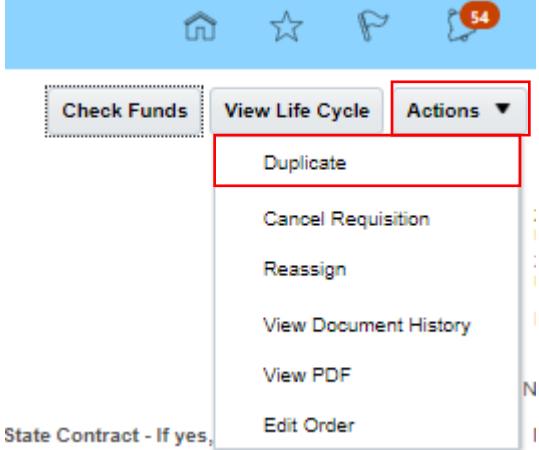
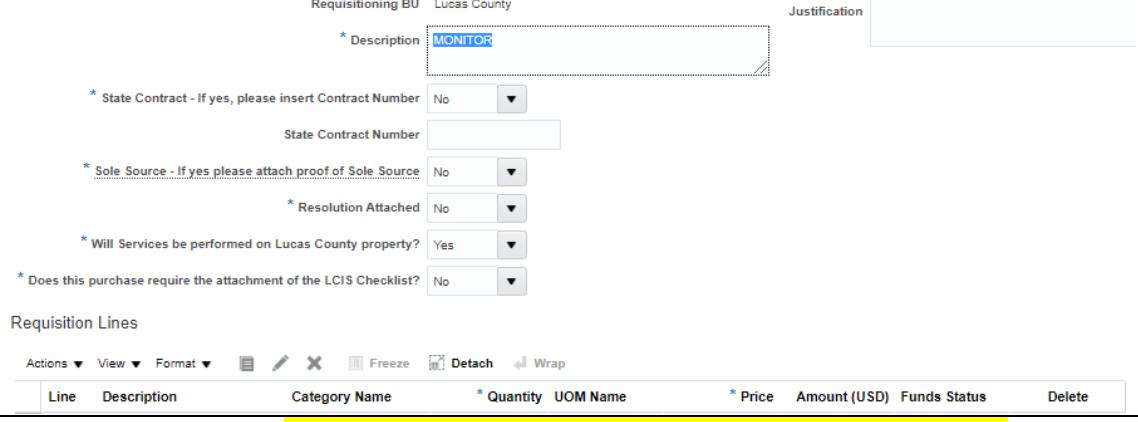
A screenshot of the "Search" search criteria dialog box. It includes fields for Requisitioning BU, Requester, Supplier, Order, Item, and Requisitions Requiring Attention. There are also fields for Entered By, Requisition, Description, Created, and Status. The "Advanced" tab is selected. A note at the top right says "At least one is required".

Search Results

A screenshot of the "Search Results" table. The table has columns for Requisition, Description, Creation Date, Approval Amount, Status, Funds Status, and Order. The table lists several requisitions, including: Requisition 1164 (TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x ...), Requisition 1159 (MONITOR), Requisition 1121 (Pest Control Services -Monthly -Office Complex 701 Adams S...), Requisition 1104 (TEST NON CATALOG FURNITURE), Requisition 1094 (MONITOR), Requisition 1093 (BIC Soft Feel Retractable Ballpoint Pens, Medium Point, Asso...), Requisition 1089 (Pest Control Services -Monthly -Office Complex 701 Adams S...), Requisition 1041 (Pest Control Services -Monthly -Vehicle Maintenance 644 Sta...), and Requisition 1040 (Pest Control Services -Monthly -Vehicle Maintenance 644 Sta...). The table shows a total of 1 row selected and 5 columns hidden.

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.

	 <p>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.</p>
4	Click Duplicate from the menu.
5	Select Create New Requisition .
6	<p>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.</p> 
8	Select Y/N option for *State Contract - If yes, please insert Contract Number .
9	Enter if 'Y' is selected in step 10 enter a number in the State Contract Number field.
10	Select Y/N *Sole Source ("If yes please attach proof of Sole Source") .
11	Select Y/N *Resolution Attached .
12	Select Y/N *Will Services be performed on Lucas County property?
13	Select Y/N *Does this purchase require the attachment of the LCIS Checklist? (If yes, lease attach the checklist in the attachments section of the requisition.).
14	Review the Requester field and make changes if needed.
15	Click in the *Quantity field(s), and enter the desired quantity of the item(s) if different than the quantities brought into this requisition from the duplicated one.



16 Click in the ***Amount** field(s), and enter the dollar amount for the item(s) if different than the amount brought into this requisition from the duplicated one.

17 In the **Line Details**, validate and edit **Delivery** (date and location), **Billing**, **Notes and attachments**, and **Source** information only if different from what was copied.

▲ Line 1: Details

▲ Delivery

Requester GLANVILLE, MICHELLE
 Requested Delivery Date 11-07-2019
 Suggested Buyer

Deliver-to Location Type Internal
 Deliver-to Location Mental Health Recovery Service
 Deliver-to Address 701 Adams Street, Suite 800, TOLEDO, OH 43604, UNITED STATES

▲ Billing

View Format

Charge Account Nickname	Charge Account	* Budget Date	* Percentage	Quantity	Amount (USD)	Funds Status	Distribution Flexfields			Delete
Office Suppli	1010.114001.50.030007.00000.00000	10-31-2019	100	2	1,000.00	Not reserved	Special 1	Special 2	Special 3	<input type="button" value="X"/>
		Total	100	2	1,000.00					

18 Click the **Save** button.

Edit Requisition: 1165

Last Saved 10-31-2019 9:01 AM

Requisitioning BU Lucas County
 * Description MONITOR

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

Requisition Lines

Actions View Format

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 <input type="button" value="X"/>
Total							1,000.00	

Rows Selected 1 Columns Hidden 8

▲ Line 1: Details

▲ Delivery

Requester GLANVILLE, MICHELLE
 Requested Delivery Date 11-07-2019
 Suggested Buyer

Deliver-to Location Type Internal
 Deliver-to Location Mental Health Recovery Service
 Deliver-to Address 701 Adams Street, Suite 800, TOLEDO, OH 43604, UNITED STATES

▲ Billing

18 Click the **Check Funds** button.

19 Click the **OK** button.

20 Click the **Manage Approvals** button.



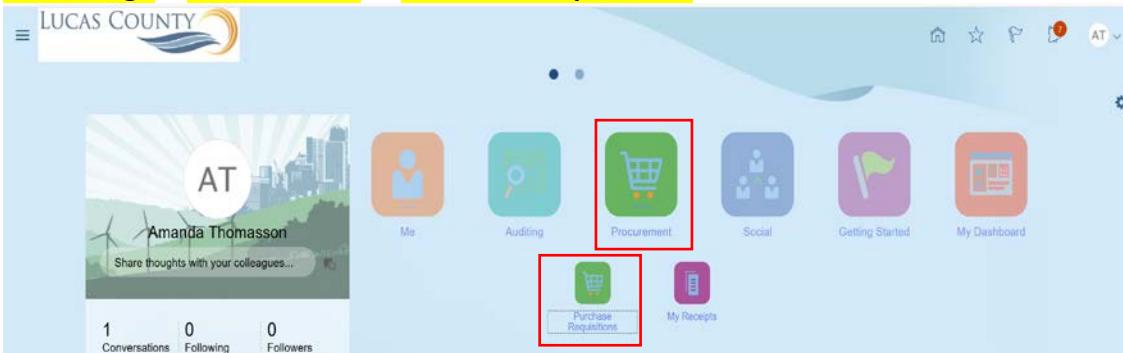
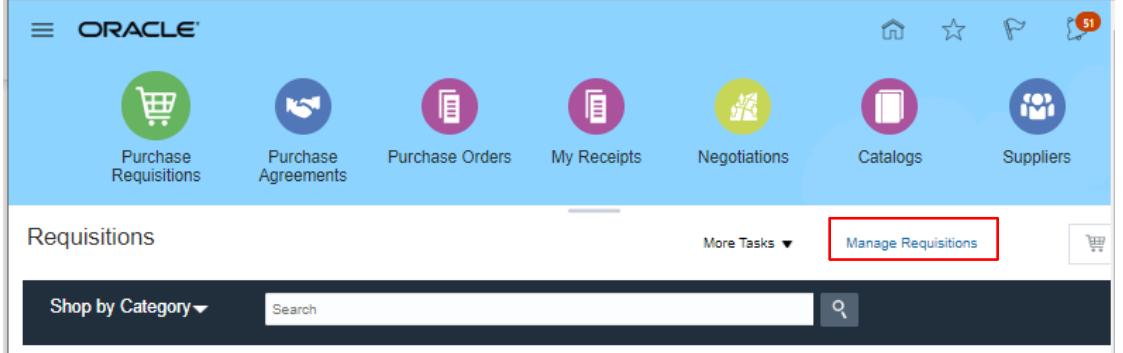
21	When all is completed, click the Submit button.
22	Click the OK button to acknowledge submission of the requisition.



Delete Requisition

Audience: Requester

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

Step	Action
1	<p>Log into Oracle.</p> <p>Home Page-> Procurement -> Purchase Requisitions</p>  A screenshot of the Oracle Home Page. The top navigation bar shows "LUCAS COUNTY" and "AT". Below the navigation are several icons: "Me" (orange), "Auditing" (teal), "Procurement" (green, highlighted with a red box), "Social" (blue), "Getting Started" (purple), and "My Dashboard" (orange). On the left, there is a profile picture for "Amanda Thomasson" with the text "Share thoughts with your colleagues...". Below the profile are statistics: 1 Conversations, 0 Following, and 0 Followers. The "Procurement" icon is highlighted with a red box.
2	<p>Click the Manage Requisitions link.</p>  A screenshot of the Oracle Procurement page. The top navigation bar shows "ORACLE". Below the navigation are icons for "Purchase Requisitions" (green), "Purchase Agreements" (blue), "Purchase Orders" (purple), "My Receipts" (pink), "Negotiations" (yellow), "Catalogs" (orange), and "Suppliers" (dark blue). The "Purchase Requisitions" icon is highlighted with a red box. The main content area shows a "Requisitions" section with a "More Tasks" dropdown and a "Manage Requisitions" link, which is also highlighted with a red box. At the bottom, there is a search bar with "Shop by Category" and a "Search" button.
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 Incomplete from the Status dropdown list, and click the Search button.</p>

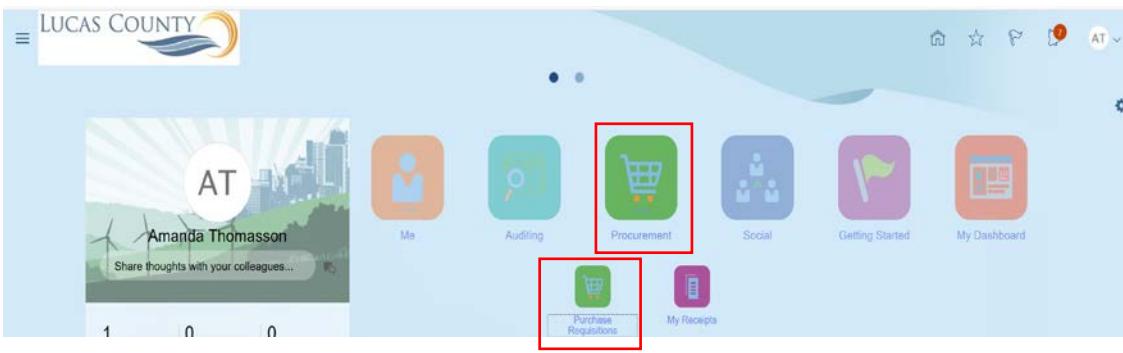




Edit Requisition

Audience: Requesters

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

Step	Action
1	<p>Log into Oracle.</p> <p>Home Page -> Procurement -> Purchase Requisitions</p>  <p>The screenshot shows the Oracle Home Page for Lucas County, Ohio. The Procurement icon, which is a green square with a shopping cart and the text "Procurement" below it, is highlighted with a red box. Other icons include "Me" (orange), "Auditing" (teal), "Social" (blue), "Getting Started" (purple), and "My Dashboard" (orange).</p>
2	Click the Manage Requisitions link to view details of requisitions you created.
3	Click the Status list to search for a Requisition in 'Pending Approval' status.
4	Highlight the Pending approval list item.
5	Click the Actions drop-down list.
6	Click the Withdraw and Edit menu item.
7	A warning message will be displayed. Click the Yes button to continue.



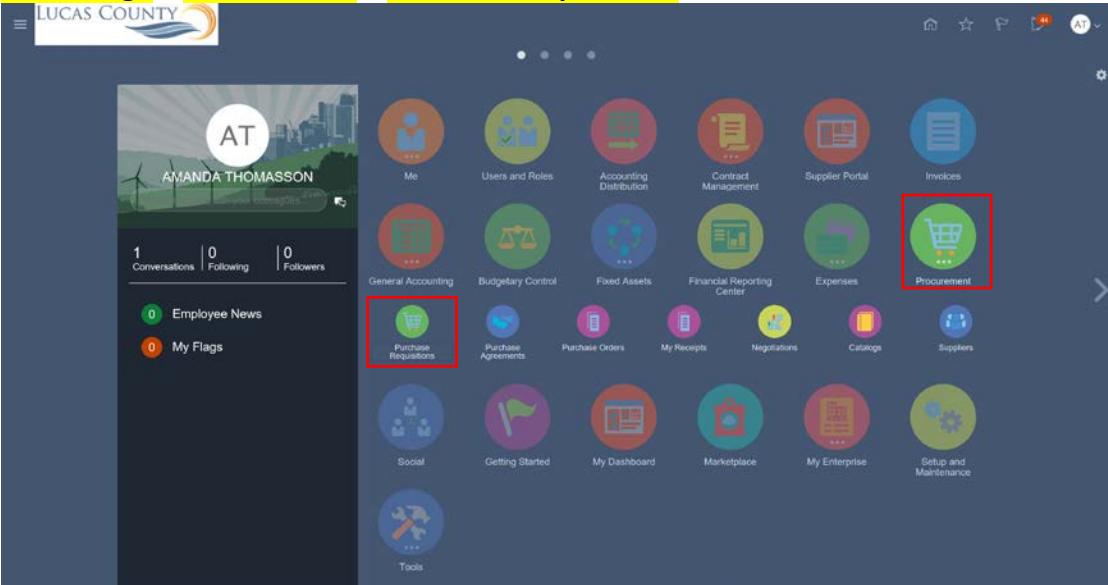
	<p>⚠ Warning</p> <p>This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes.</p> <p>Do you want to continue?</p> <p style="text-align: right;"><input type="button" value="Yes"/> <input type="button" value="No"/></p>
8	Click on the Quantity field and update with a new quantity.
9	Click the Save button.
10	Click the Submit button.
11	Click the OK button.

Add Approver to Requisition Approval Path

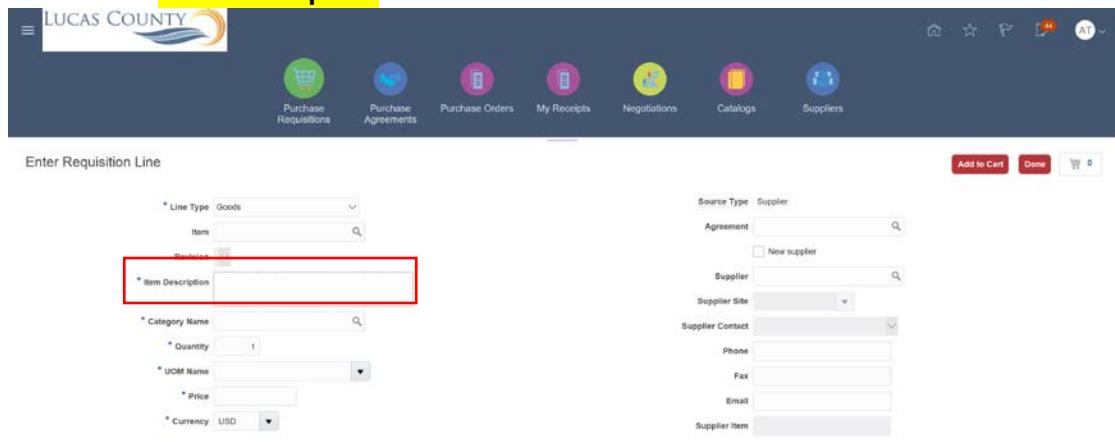
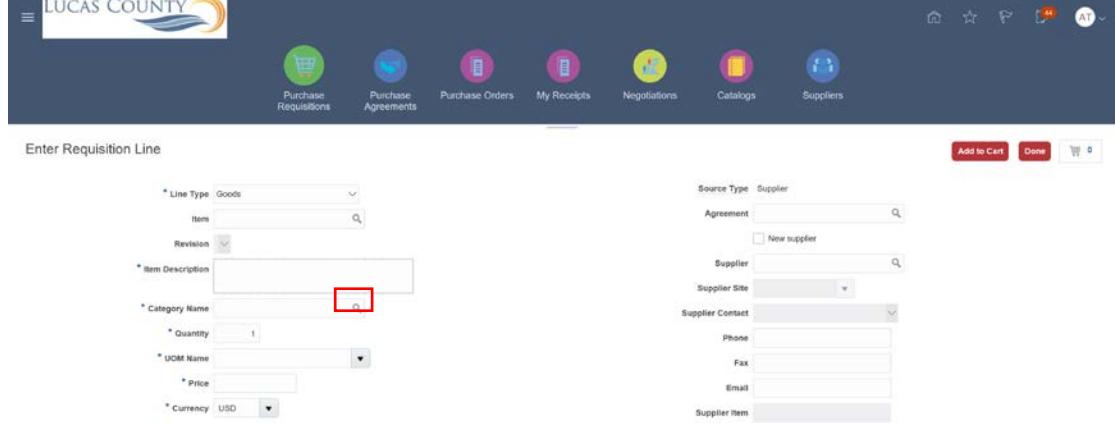
Audience: Requester, Approver

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

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

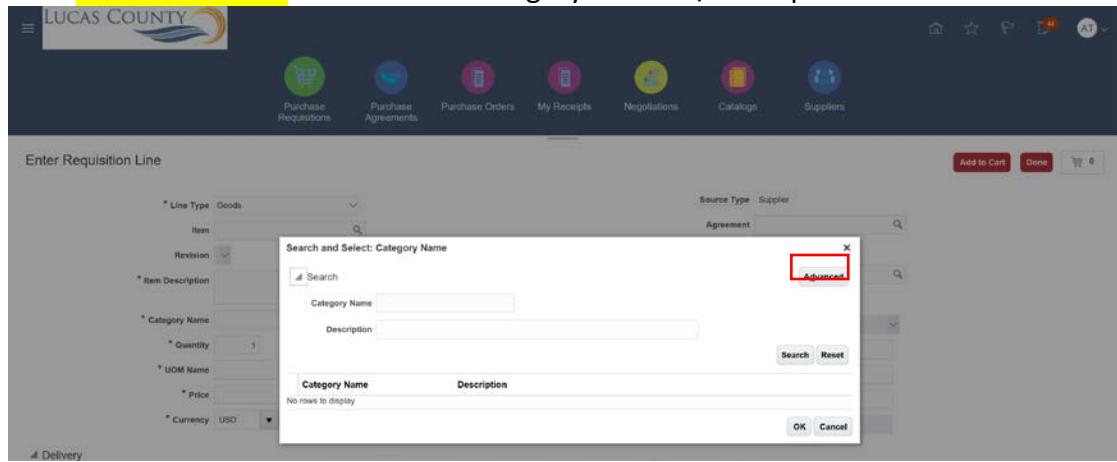
Step	Action
1	<p>Log into Oracle.</p> <p>Home Page > Procurement > Purchase Requisitions</p> 
2	<p>Click the More Tasks > Enter Requisition Line link.</p> 
3	Click the Line Type list.



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

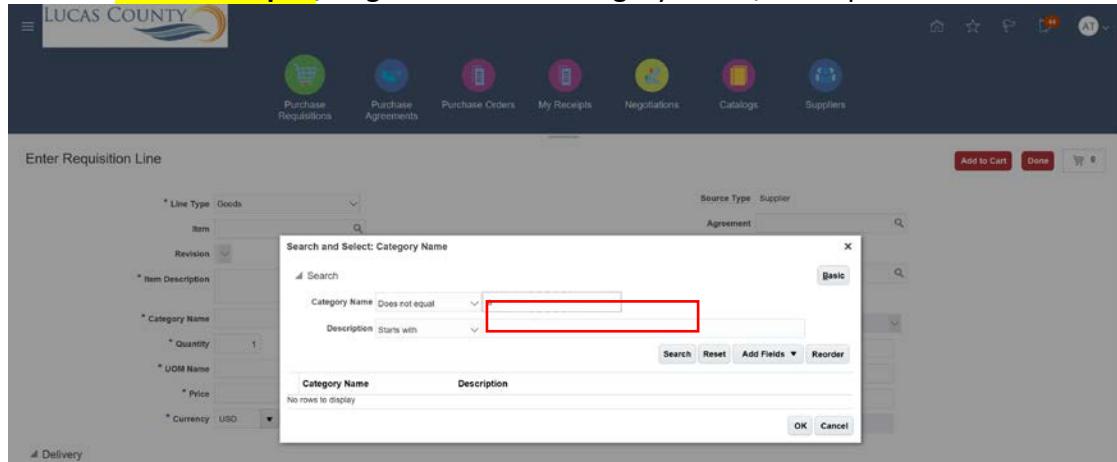


11 Click **Advance** button to search for Category Number/Description



The screenshot shows a software interface for managing requisitions. A search dialog box is open, titled "Search and Select: Category Name". The "Advanced" button in the top right corner of the dialog is highlighted with a red box. The dialog contains fields for "Category Name" and "Description", and a "Search" button.

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

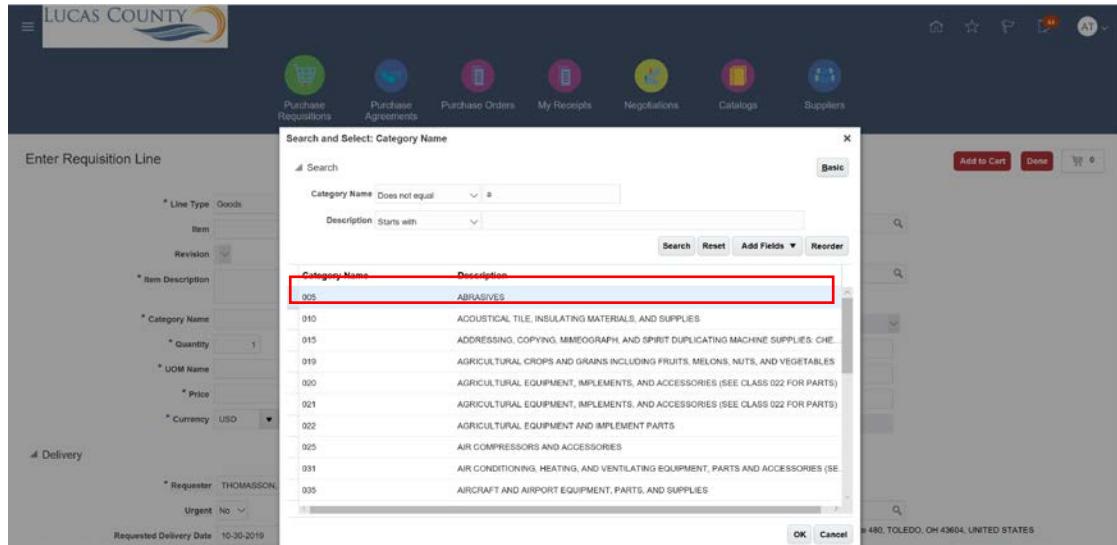


The screenshot shows the same software interface as the previous step. The search dialog box is open, and the "Category Name" dropdown menu is visible, with "Does not equal" highlighted with a red box. The dialog also shows "Description Starts with" and other search options.

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

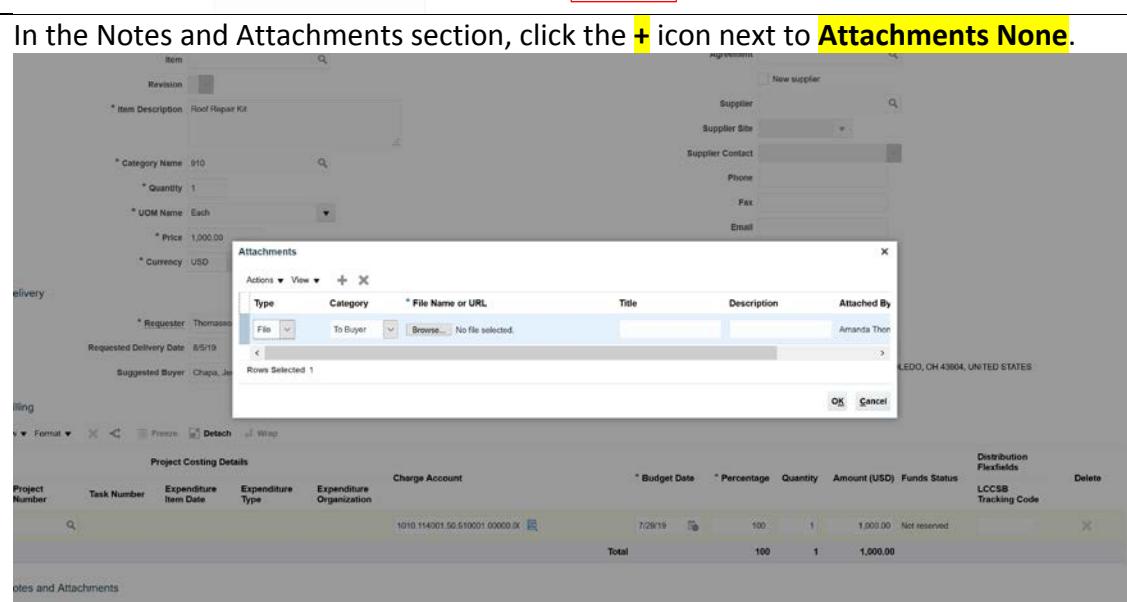
14 Click the **Search** button.

15 Make a selection from the search results list.

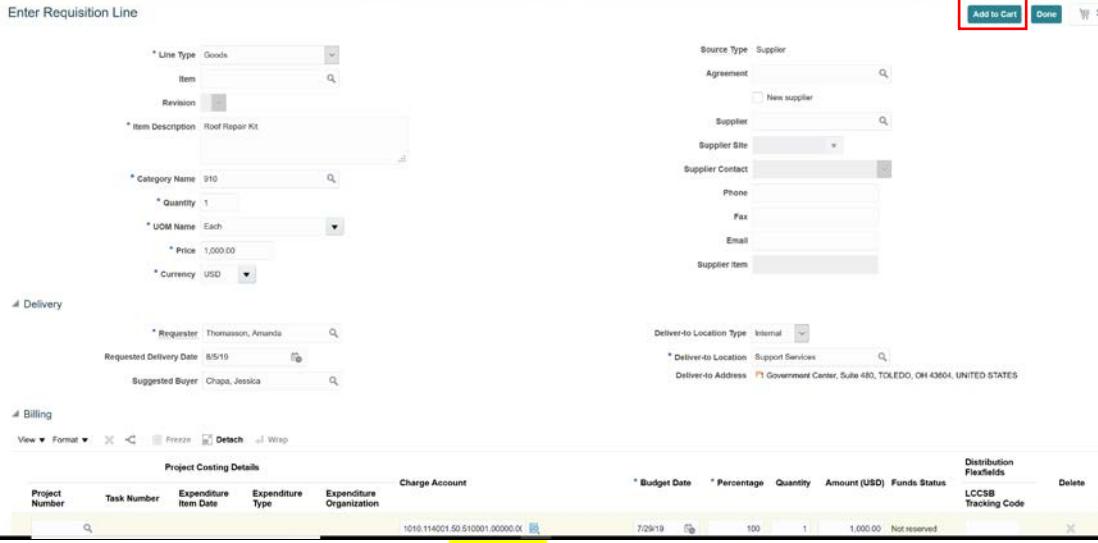
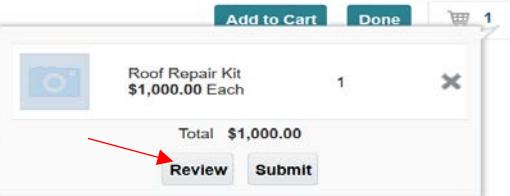


The screenshot shows the search results list from the previous step. The first result, "005 ABRASIVES", is highlighted with a red box. The list includes other categories like "010 ACOUSTICAL TILE, INSULATING MATERIALS, AND SUPPLIES" and "015 ADDRESSING, COPYING, MIMEOGRAPH, AND SPIRIT DUPLICATING MACHINE SUPPLIES; CHE". The bottom right corner of the dialog shows the text "OK Cancel".



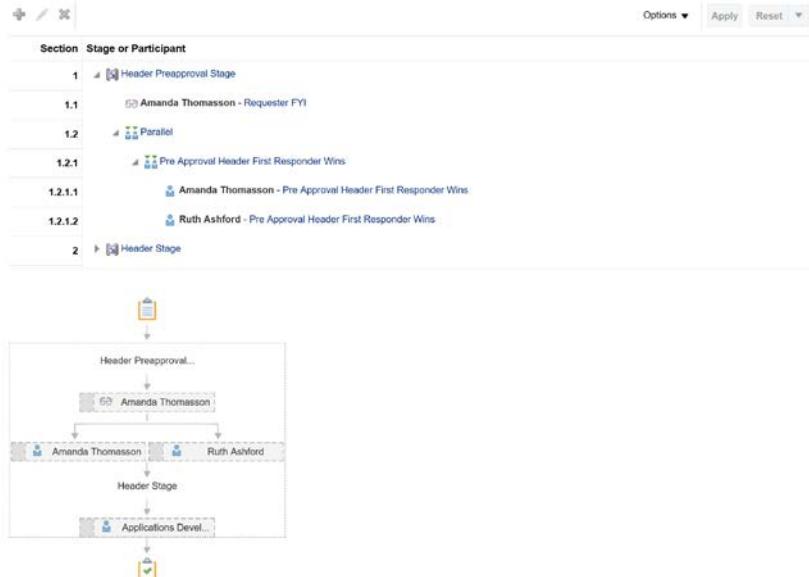
16	Click the OK button.
17	Click in the Quantity field.
18	Enter information into the Quantity field.
19	Click in the UOM field.
20	Enter information into the UOM field.
21	Click the EA Quantity Each list item.
22	Click in the Price field.
23	Enter information into the Price field.
24	Click in the Currency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



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



Manage Approvals (Requisition 1195)



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 Search icon for User in the Add Assignee window.</p>
51	Select the Approver User ID .
52	Select a Position (Start of Stage) and click Ok .
53	Enter the first name of the Approver to be inserted.
54	Make a note of where the user was inserted into the approval path.
55	Enter the Last Name of the Approver to be inserted.



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

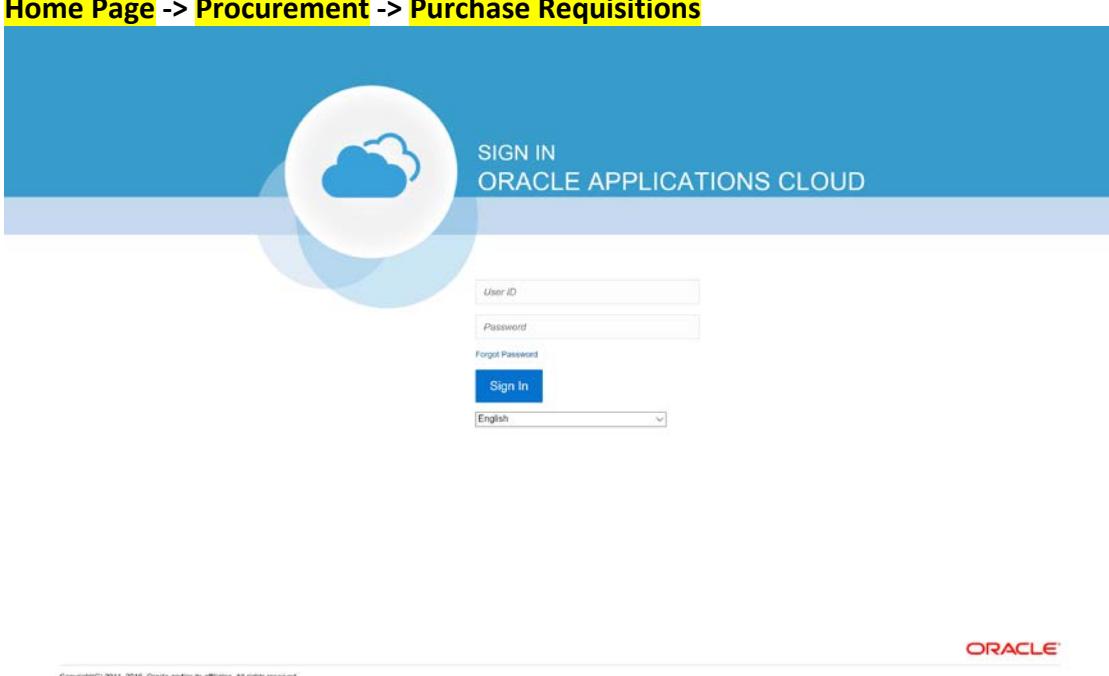
Cancel Requisition

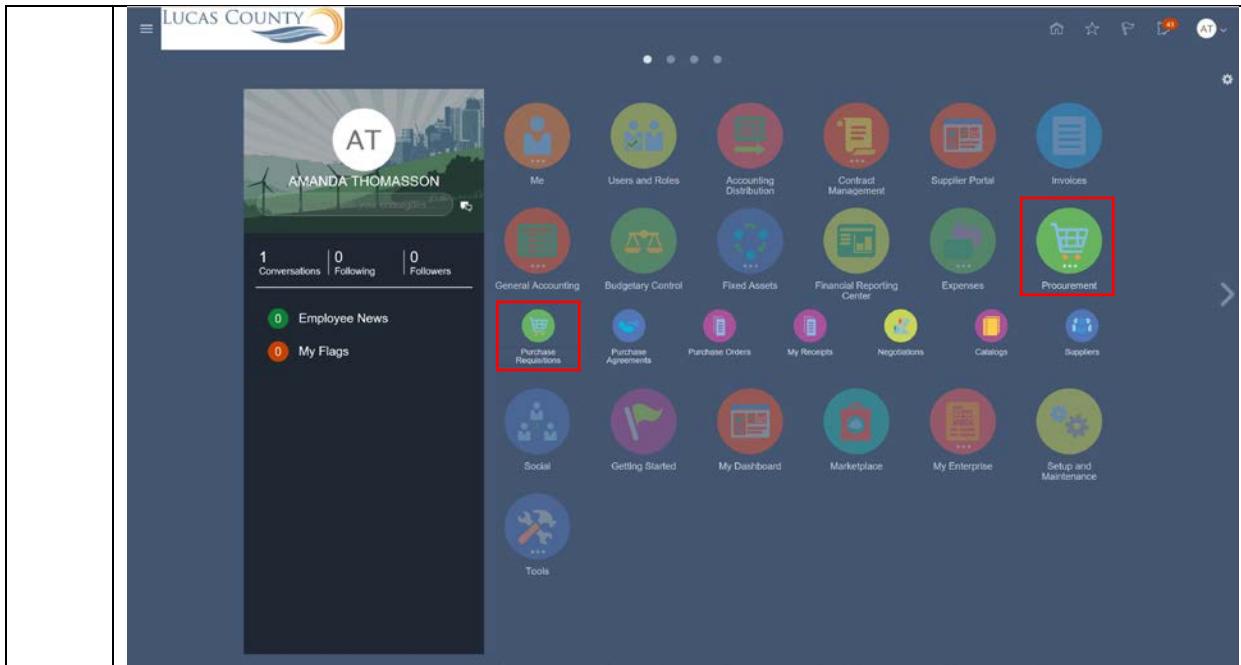
Audience: Requester

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

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

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

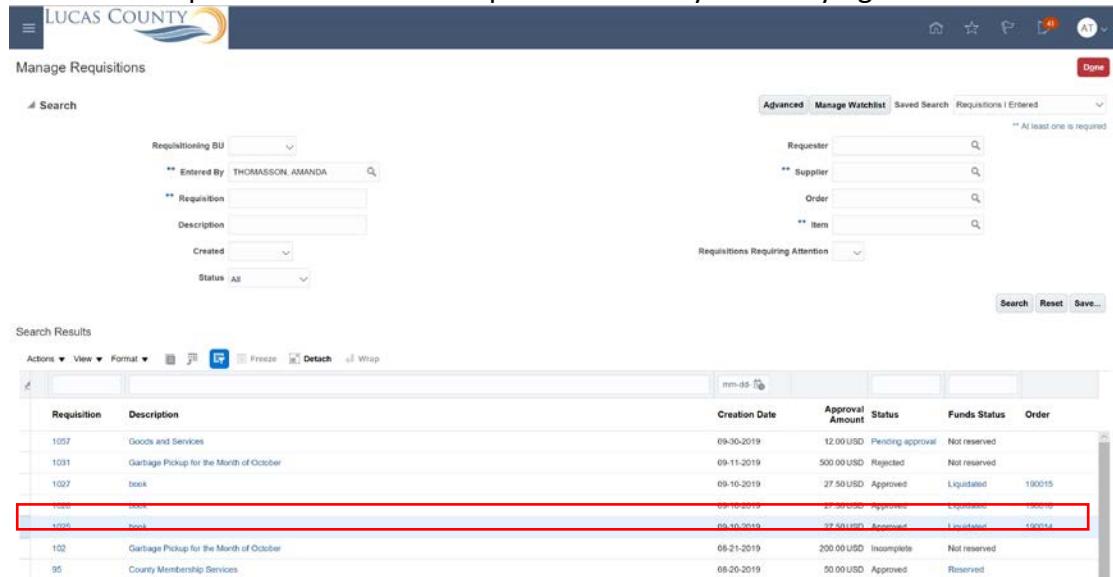
Step	Action
1	<p>Log into Oracle.</p> <p>Home Page -> Procurement -> Purchase Requisitions</p> 



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.

The screenshot shows the "Manage Requisitions" screen. The "Actions" dropdown menu is open, with the "Cancel Requisition" option highlighted and surrounded by a red box. The main table displays several requisition entries with columns for Creation Date, Approval Amount, Status, Funds Status, and Order. One row is highlighted in yellow.

Requisition	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	09-10-2019	27.50 USD	Approved	Liquidated	190015
95	09-10-2019	27.50 USD	Approved	Liquidated	190016
Garbage Pickup for the Month of October	09-10-2019	200.00 USD	Approved	Liquidated	190014
County Membership Services	08-21-2019	200.00 USD	Incomplete	Not reserved	
	08-20-2019	50.00 USD	Approved	Reserved	

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

The screenshot shows the "Manage Requisitions" screen. The "Actions" dropdown menu is open, with the "Cancel Requisition" option highlighted and surrounded by a red box. The main table displays several requisition entries with columns for Creation Date, Approval Amount, Status, Funds Status, and Order. One row is highlighted in yellow.

Requisition	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	09-10-2019	27.50 USD	Approved	Liquidated	190015
95	09-10-2019	27.50 USD	Approved	Liquidated	190016
Garbage Pickup for the Month of October	09-10-2019	200.00 USD	Approved	Liquidated	190014
County Membership Services	08-21-2019	200.00 USD	Incomplete	Not reserved	
	08-20-2019	50.00 USD	Approved	Reserved	



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

A screenshot of a web-based application titled "Manage Requisitions". The interface includes search and filter options like "Requisitioning BU", "Entered By" (set to "THOMASSON, AMANDA"), and "Status" (set to "All"). A "Cancel Requisition" dialog box is open in the center, prompting for a reason with a dropdown menu containing "Incorrect order". The "OK" button in this dialog is highlighted with a red box. The main search results table shows a single row for "1057 Goods and Services".

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1057	Goods and Services	09-30-2019	12.00 USD	Pending approval	Not reserved	

7 Click the **OK** button.

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

A screenshot of the same "Manage Requisitions" application. A "Confirmation" dialog box is open, stating "The requisition lines were canceled or cancellation requests were submitted for the above requisitions." The "OK" button in this dialog is highlighted with a red box. The main search results table shows multiple rows of requisitions, including "1026 book", "1025 book", "102 Garbage Pickup for the Month of October", "95 County Membership Services", and "86 Anti-virus Software".

Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
1026	book	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	
86	Anti-virus Software	08-15-2019	0	Canceled	Not reserved	



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 Home Page > Procurement > Purchase Requisitions</p>  A screenshot of the Oracle Applications Cloud sign-in page. It features a large blue header with the text "SIGN IN ORACLE APPLICATIONS CLOUD". Below the header is a white sign-in form with a large circular logo containing a blue cloud icon. The sign-in fields are labeled "AMTHOMA" and "*****". There is a "Forgot Password" link and a "Sign In" button. At the bottom is a language selection dropdown set to "English".



	A screenshot of the Lucas County SharePoint home page. The top navigation bar includes icons for Home, Favorites, and AT. Below the navigation is a banner for "Amanda Thomasson" with a "Share thoughts with your colleagues..." button. The main content area features several tiles: "Me" (orange), "Auditing" (teal), "Procurement" (green, highlighted with a red box), "Social" (blue), "Getting Started" (purple), "My Dashboard" (red), "Purchase Requests" (green, highlighted with a red box), "My Receipts" (purple), "Marketplace" (teal), "My Enterprise" (red), "Setup and Maintenance" (yellow), and "Tools" (blue).
2	Click the Shopping Lists link. A screenshot of the "Requisitions" page. The top navigation bar includes icons for Home, Favorites, and AT. Below the navigation is a "Purchase Requests" tile and a "My Receipts" tile. The main content area shows "Recent Requisitions" and "Recent Purchases". The "Recent Requisitions" table lists items like "First Aid Kit - Hard Case - Level 1", "Non-Latex Examination Gloves - Large - 100 box", "Cement Mixer Supervisor", "Industrial Cement Mixing Unit", and "Window Washing Service", each with a status (Incomplete, Withdrawn, Approved). The "Recent Purchases" section shows "No data to display." Below this is a "Top Categories" section with links to "SAP", "GRAINGER", "Staples", "Computer Supplies", "Maintenance Supplies", and "Office Supplies". The top right of the page shows "More Tasks", "Manage Requisitions", and a "Shopping Lists" link (highlighted with a red box). The bottom right shows "Requester Amanda Thomasson".
3	Click the Create Shopping List button. A screenshot of the "Requisitions" page, identical to the previous one but with a red box highlighting the "Create Shopping List" button in the top right corner of the main content area.
4	The Manage My Shopping Lists Window appears. The '+' icon represents adding a row. Click the Add Row button.
5	Add a description and click Save and Close .
6	Click in and enter information into the Search field.
7	Click the Search button.



8 From the catalog entries appearing in the search list, select each item to be added to the personal shopping list. Hold the **Ctrl** key as you click each item to select multiple items.

A screenshot of a web-based catalog search results page. The search term 'Gloves' is entered in the search bar. The results table shows various glove products with columns for Price (USD), UOM, Quantity, and Amount. A sidebar on the left includes filters for Categories, Brand (OH & S SAFETY), and Price (set between \$0 and \$8.20). Buttons for 'Add to Cart', 'Add to Shopping List', and 'Add to Compare' are visible at the top of the results table.

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

A screenshot of a product detail page for 'Non-Latex Examination Gloves - Large - 100/box'. The page includes a 'View' dropdown, 'Add to Cart' button, a redboxed 'Add to Shopping List' button, and 'Add to Compare' button. Below the buttons is a 'Description' section containing the product name.

10 Select the name of the shopping list to be added to from the drop-down list. Click **Save and Close**.

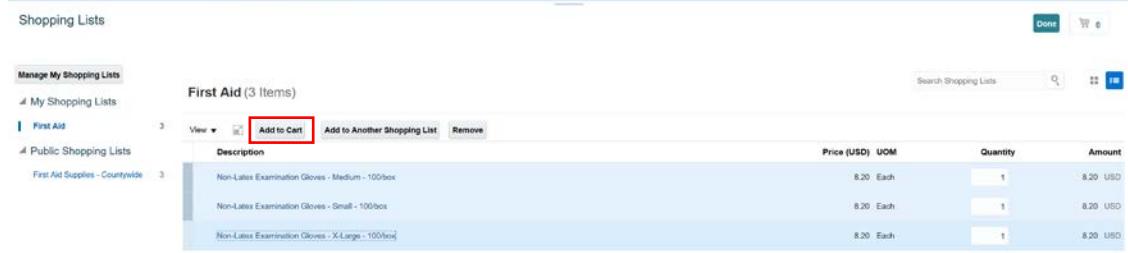
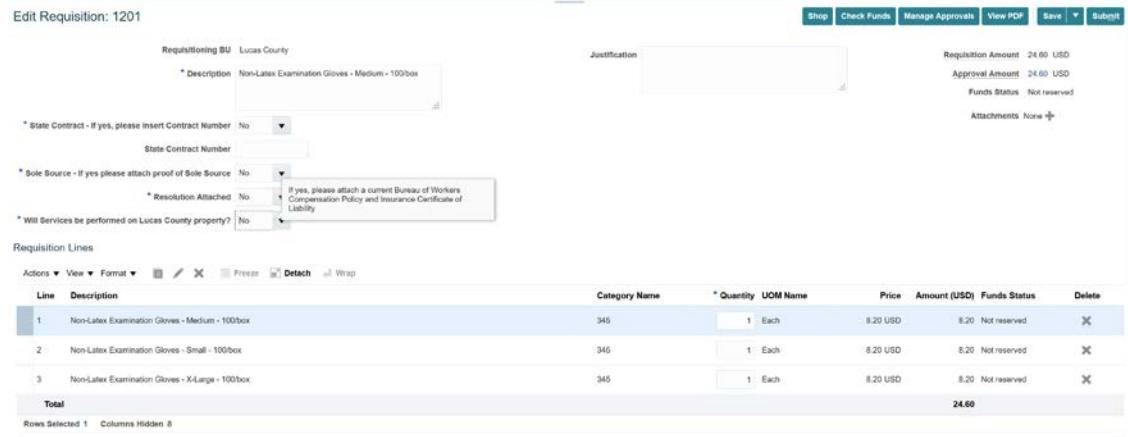
11 Note the confirmation message. Click the **OK** button.

12 Navigate to the **Shopping Lists** menu and click the link to select the saved shopping list from the menu selection.

A screenshot of the 'Requisitions' menu. The 'Recent Requisitions' section shows a list with one item: '12000 First Aid Kit - Hard Case - Level 1'. The 'Recent Purchases' section shows 'No data to display.' On the right, there are buttons for 'More Tasks', 'Manage Requisitions', 'Shopping Lists' (with a dropdown showing 'First Aid'), and a 'Create Shopping List' button. A red box highlights the 'First Aid' link in the shopping lists dropdown.

13 From the items in the list, select each item to be added to the requisition. Hold the **Ctrl** key as you click each item to select multiple items.



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

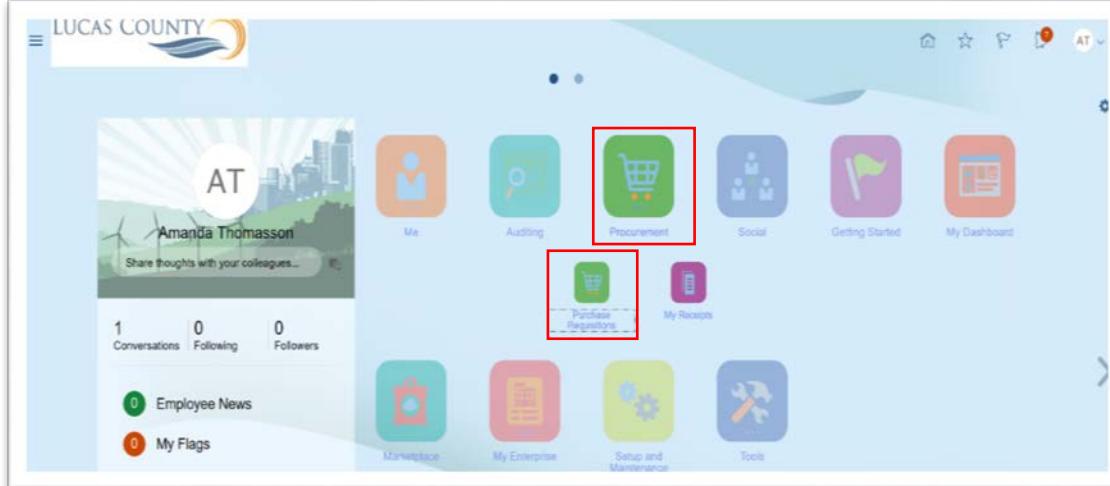


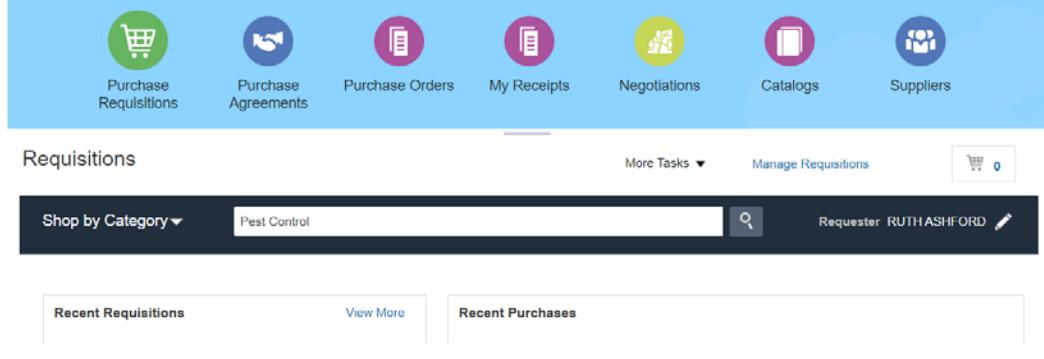
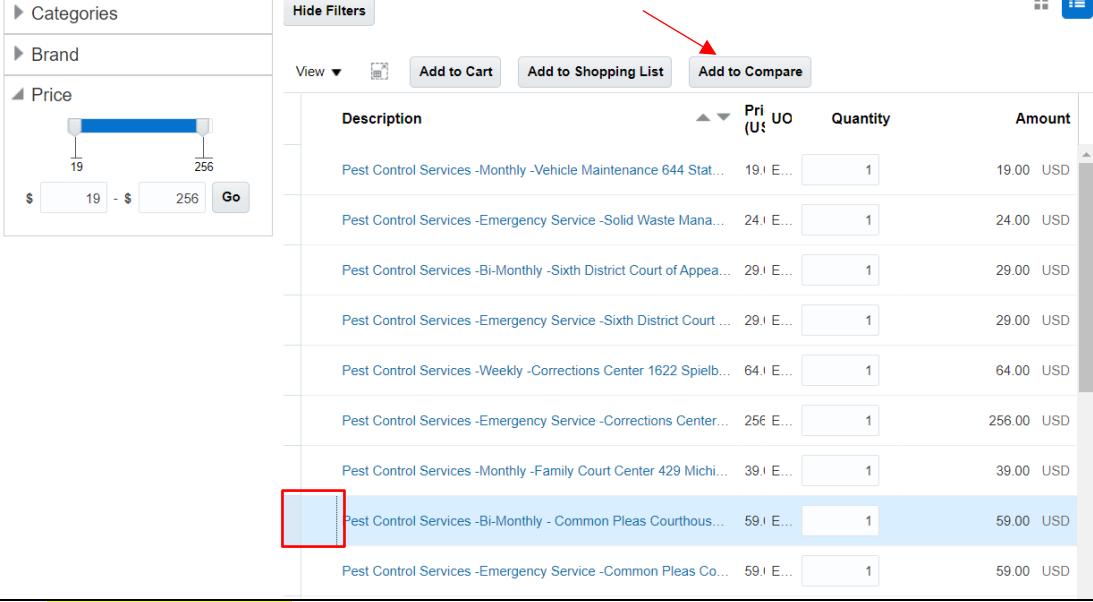
Compare Items

Audience: Requesters, Buyers

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

Comparing Items is only used for comparing internal catalog items.

Step	Action
1	<p>Log into Oracle Home Page > Procurement > Purchase Requisitions</p>  A screenshot of the Oracle Applications Cloud sign-in page. It features a large blue header with the text "SIGN IN ORACLE APPLICATIONS CLOUD". Below the header is a white input field for "AMTHOMA" and a password field with "*****". There is a "Forgot Password" link and a "Sign In" button. A language selection dropdown shows "English".  A screenshot of the Lucas County internal dashboard. The top navigation bar includes the Lucas County logo, user profile, and various icons. The main content area features a profile card for "Amanda Thomasson" with "1 Conversations", "0 Following", and "0 Followers". Below the profile are links for "Employee News" and "My Flags". The main navigation menu includes "Me", "Auditing", "Procurement" (which is highlighted with a red box), "Social", "Getting Started", "My Dashboard", "Marketplace", "My Enterprise", "Setup and Maintenance", and "Tools". <p>Procurement</p> <p>Purchase Requisitions</p>
2	Search for the first item. Click in the Search field and type description of an item for comparison.

	 <p>For this example, type in “Pest Control”.</p>	
3	Click the  Search button. Alternatively, you can click the Enter button on your keyboard.	
4	From the list of results, click to select a line item and click the Add to Compare button. 	
5	The Compare Products banner displays in the Search Results window, awaiting another item to compare.	

Categories Hide Filters

Brand

Price

View Add to Cart Add to Shopping List Add to Compare

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

Compare Products  Pest Control Serv...

You can enter another item name, and click the Search button as before to search for second item, or select from the list results of the existing search. For this example, click another item row.

6	<p>Click the Add to Compare button.</p> <p>Add to Cart Add to Shopping List Add to Compare</p> <p>The icons for compared items display side by side in the Compare Products banner.</p> <p>Compare Products  Pest Control Serv...  Pest Control Serv... Control Services -Emergency Service -Conference & Learning Center 711 Adams St. Toledo Control Services -Monthly -Work Release 1111 Madison Ave. Toledo Compare Clear</p>
7	<p>Click the Compare button within the banner to compare and display attributes of the selected items. Comparison details can include the item price, description, and if an item is on a blanket (indicated by the fact a supplier exists for the item). Note: Not all comparison information may be available.</p>

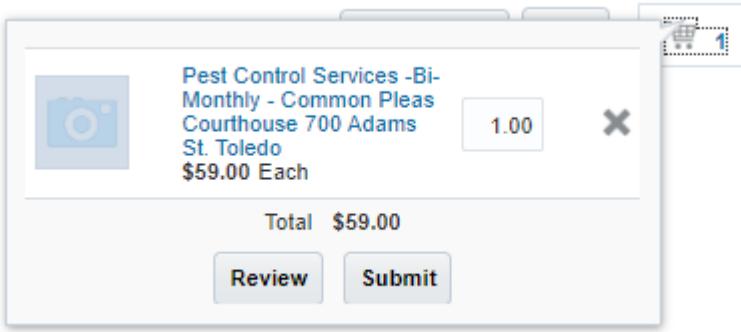


Compare Products

	 X Pest Control Services -Bi-Monthly - Common Pleas Courthouse 700 Adams St. Toledo \$59.00 Each <div style="display: flex; justify-content: space-around;">1</div>	 X Pest Control Services -Emergency Service -Common Pleas Courthouse 700 Adams St. Toledo \$59.00 Each <div style="display: flex; justify-content: space-around;">1</div>
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> <div style="border: 1px solid red; padding: 2px; display: inline-block;">1</div>  
	<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> <div style="border: 1px solid red; padding: 2px; display: inline-block;">1</div>   <div style="border: 1px solid red; padding: 2px; display: inline-block; width: 150px;">Add to Shopping List</div>
9	Click the Shopping Cart icon within the requisition window to see a quick view of details.
10	Please click the Review button to provide additional required details.





11 Provide a required **Description** for your requisition. A default is provided by default.

Edit Requisition: 1047

Requisitioning BU Lucas County

* Description supplies

* State Contract - If yes, please insert Contract Number

No



12 There are considerations and additional attachments that may be required depending on whether the item is attached to a state contract, is an item of sole source, or if services, those that will be performed onsite at Lucas County property.

If on **State Contract**, please select **Yes** from the dropdown arrow, then note the State Contract Number.

If item is on record as a **Sole Source**, please indicate yes, and select **Yes** to Resolution Attached, then ensure you provide proof of Sole Source as an attachment to the requisition.

If a **Service** is being requisitioned that will **be performed on Lucas County property**, please select **Yes** and then please attach a current Bureau of Workers Compensation Policy and Insurance Certificate of Liability.

For this example, select **No** for the following fields, indicating no attachments would be required for justification of those criteria.

* State Contract - If yes, please insert Contract Number No ▾

State Contract Number

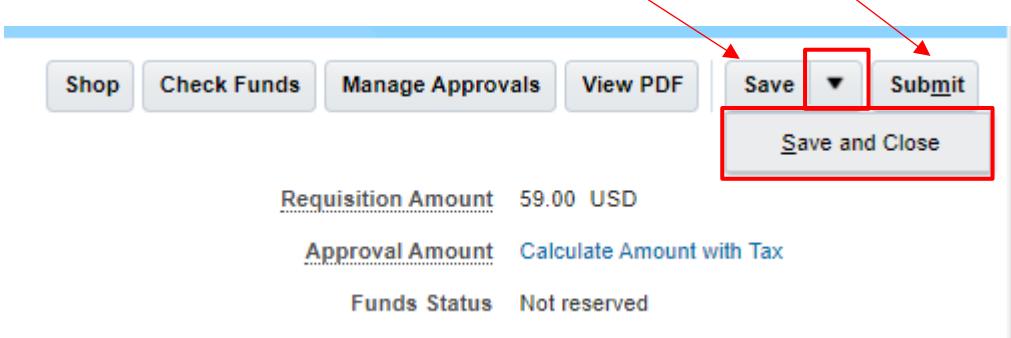
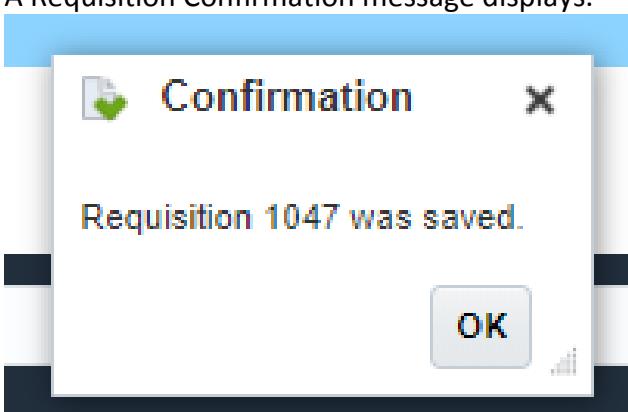
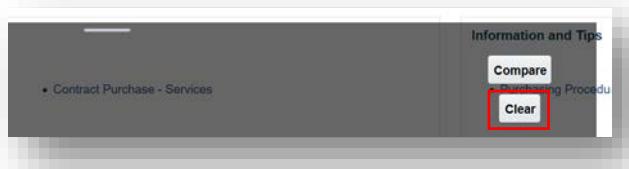
* Sole Source - If yes please attach proof of Sole Source No ▾

* Resolution Attached No ▾

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

Review Requisition lines. The quantities can be edited by entering another quantity directly into the **Quantity** field, and lines can be deleted at this point using the **X** indicated at the end of the lines.

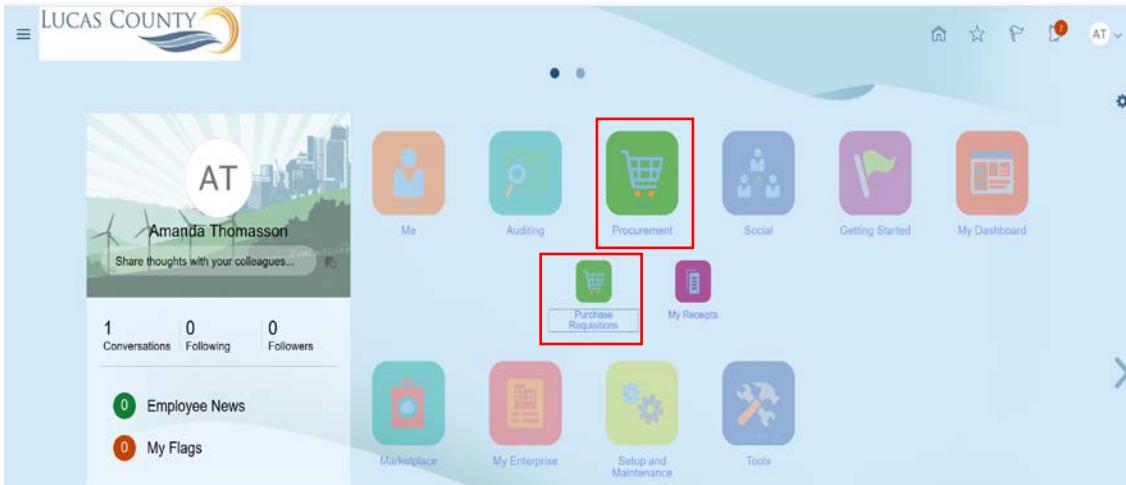
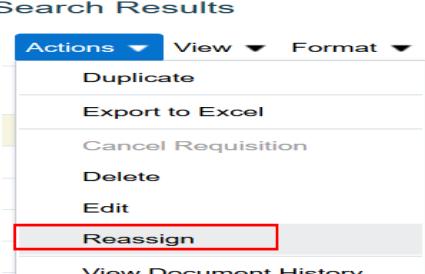
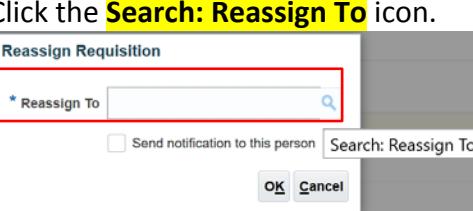
	<p>Requisition Lines</p> <p>Actions ▾ View ▾ Format ▾ </p> <table border="1"> <thead> <tr> <th>Line</th><th>Description</th><th>Category Name</th><th>* Quantity</th><th>UOM Name</th><th>* Price</th><th>Amount (USD)</th><th>Funds Status</th><th>Delete</th></tr> </thead> <tbody> <tr> <td>1</td><td>Pest Control Service 675</td><td></td><td><input type="text" value="1"/></td><td>Each</td><td>59.00</td><td>USD</td><td>59.00</td><td></td></tr> <tr> <td colspan="8">Total</td><td>59.00</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	Pest Control Service 675		<input type="text" value="1"/>	Each	59.00	USD	59.00		Total								59.00
Line	Description	Category Name	* Quantity	UOM Name	* Price	Amount (USD)	Funds Status	Delete																				
1	Pest Control Service 675		<input type="text" value="1"/>	Each	59.00	USD	59.00																					
Total								59.00																				
	<p>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.</p> <p> Notes and Attachments</p> <p>Note to Supplier Attachments None </p>																											
	<p>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.</p> <p>Click the OK button in the Attachments pane.</p> <p> Attachments</p> <p>Actions ▾ View ▾ </p> <table border="1"> <thead> <tr> <th>Type</th> <th>Category</th> <th>* File Name or URL</th> <th>Title</th> <th>Description</th> <th>Attached By</th> </tr> </thead> <tbody> <tr> <td>File</td> <td>Internal to Re</td> <td> No file chosen</td> <td>Liability Cert</td> <td></td> <td>RUTH ASHFC</td> </tr> </tbody> </table> <p>Rows Selected 1 </p>	Type	Category	* File Name or URL	Title	Description	Attached By	File	Internal to Re	No file chosen	Liability Cert		RUTH ASHFC															
Type	Category	* File Name or URL	Title	Description	Attached By																							
File	Internal to Re	No file chosen	Liability Cert		RUTH ASHFC																							
	<p>The attachment title entered will display in the Attachments section and will be evident to the requisition.</p> <p> Notes and Attachments</p> <p>Note to Supplier Attachments Liability Cert </p>																											
10	<p>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>																											

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

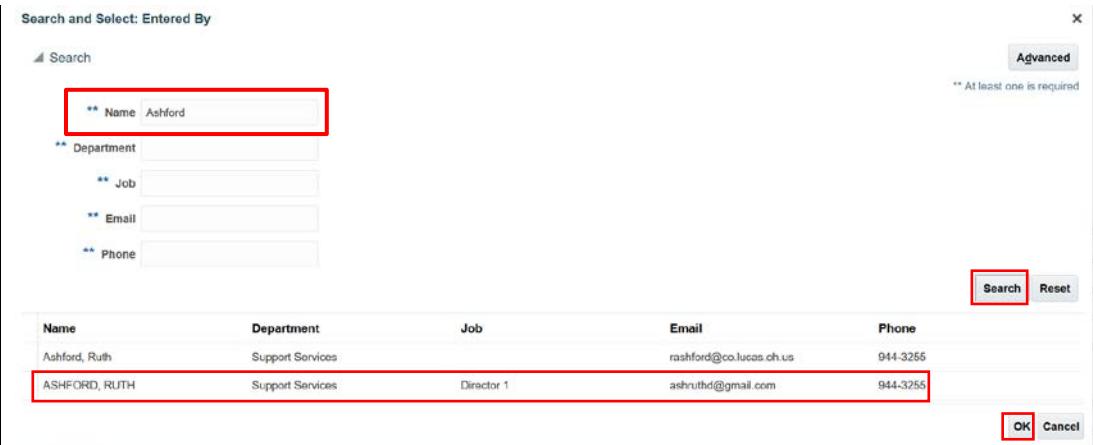
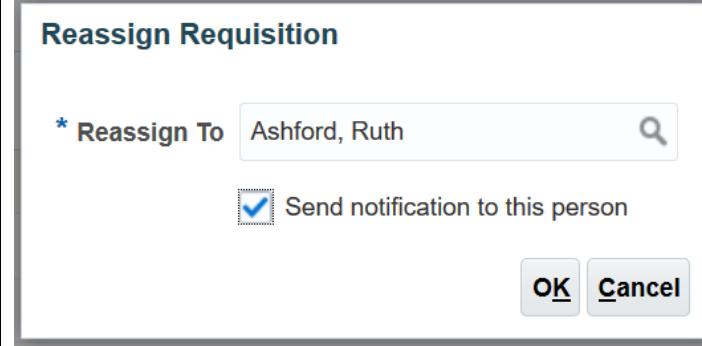
Forward Requisition

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



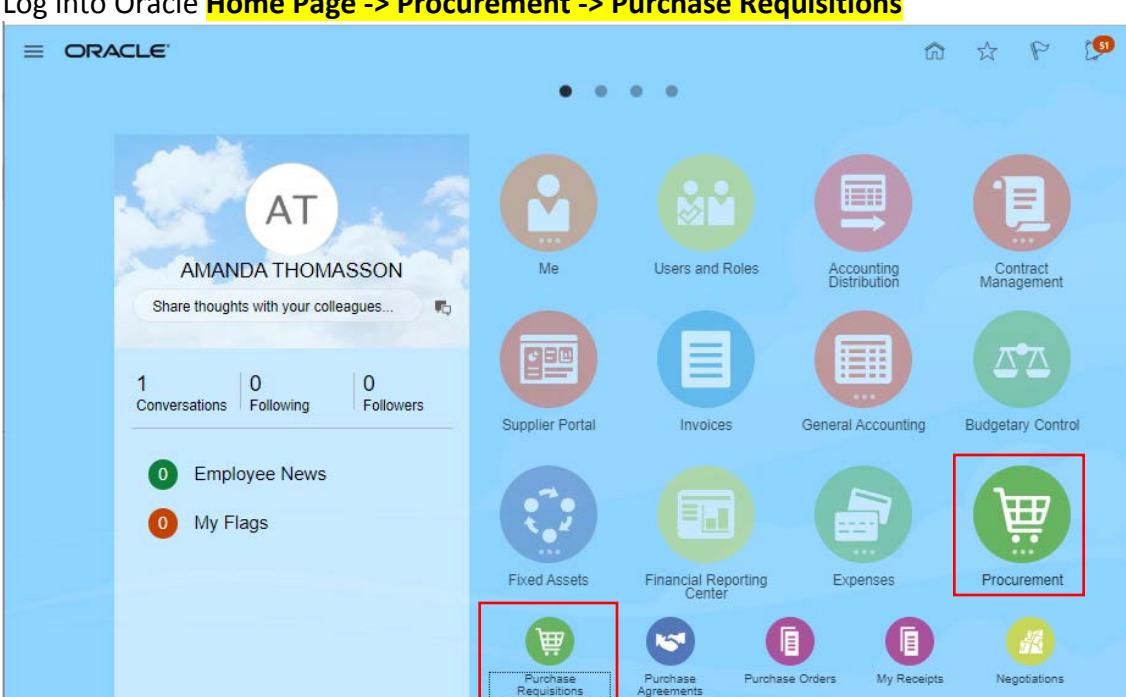
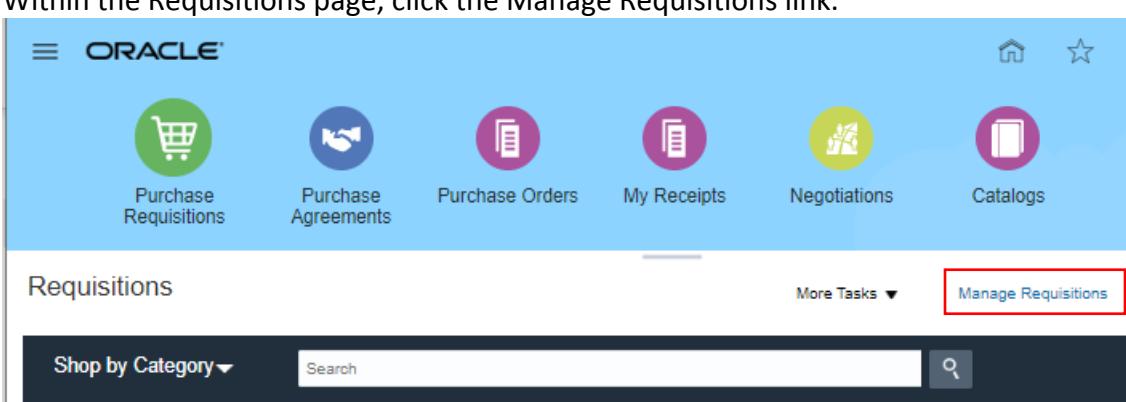
	 A screenshot of a search dialog box titled "Search and Select: Entered By". It has a "Search" section with a "Name" field containing "Ashford" (highlighted with a red box). Below it are fields for "Department", "Job", "Email", and "Phone". To the right is an "Advanced" button and a note "At least one is required". A table below shows search results for "Name", "Department", "Job", "Email", and "Phone". The first row is for "Ashford, Ruth" and the second row is for "ASHFORD, RUTH". The second row is highlighted with a red box. At the bottom are "Search" and "Reset" buttons, and a modal footer with "OK" and "Cancel" buttons.
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.  A screenshot of a "Reassign Requisition" dialog box. It has a search bar with "Ashford, Ruth" and a checked checkbox "Send notification to this person". At the bottom are "OK" and "Cancel" buttons.
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, amend and tracking progress of requisitions.

Step	Action
1	Log into Oracle Home Page -> Procurement -> Purchase Requisitions  The screenshot shows the Oracle Home Page. On the left, there is a sidebar with a profile picture for "AMANDA THOMASSON", 1 conversation, 0 following, and 0 followers. Below that are "Employee News" and "My Flags". On the right, there is a grid of icons for various Oracle modules. The "Procurement" icon, which is a shopping cart, is highlighted with a red box. Other icons include "Me", "Users and Roles", "Accounting Distribution", "Contract Management", "Supplier Portal", "Invoices", "General Accounting", "Budgetary Control", "Fixed Assets", "Financial Reporting Center", "Expenses", "Purchase Requisitions" (which is also highlighted with a red box), "Purchase Agreements", "Purchase Orders", "My Receipts", and "Negotiations".
2	Within the Requisitions page, click the Manage Requisitions link.  The screenshot shows the "Requisitions" page. At the top, there are links for "Purchase Requisitions", "Purchase Agreements", "Purchase Orders", "My Receipts", "Negotiations", and "Catalogs". Below that is a search bar with "Shop by Category" and "Search" buttons. At the bottom right of the page, there is a "Manage Requisitions" link, which is highlighted with a red box.

NOTE: You can either view the entire list of requisitions which displays by default, or search by status. You may delete requisitions in "Incomplete" status. For this example, use the Search fields in the Manage Requisition page to search based on Pending

Approval status to display only those requisitions not yet approved. Select Pending Approval from the Status dropdown list, and click the Search button

3 Click the **Search** button.

Manage Requisitions

Search

Requisitioning BU:

** Entered By: THOMASSON, AMANDA

** Requisition:

Description:

Created:

Status:

Requester:

** Supplier:

Order:

** Item:

Requisitions Requiring Attention:

Advanced Manage Watchlist Saved Search Requisitions I Entered

At least one is required

Search Reset Save...

4 The Search Results narrow to only those meeting your status selection. Make a requisition selection by clicking a line.

Manage Requisitions

Search

Actions View Format Advanced Manage Watchlist Saved Search Requisitions I Entered

Search Results

	Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
	1164	TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x ...	10-29-2019	613.88 USD	Pending approval	Not reserved	
	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	

Columns Hidden 5

5 **NOTE:** "First, ensure you have selected a line to take action. Actions will populate dependent on what you select."

Manage Requisitions

Search

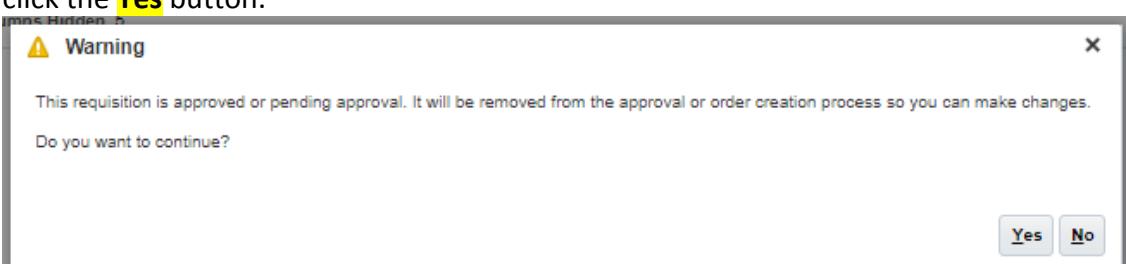
Actions View Format Advanced Manage Watchlist Saved Search Requisitions I Entered

Search Results

	Requisition	Description	Creation Date	Approval Amount	Status	Funds Status	Order
	1164	TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x ...	10-29-2019	613.88 USD	Pending approval	Not reserved	
	1041	Pest Control Services -Monthly -Vehicle Maintenance 644 Sta...	10-18-2019	228.00 USD	Pending approval	Not reserved	

For this example, we will edit a requisition and resubmit for approval.

6 Click the **Withdraw and Edit** menu item.

	<p>Search Results</p> <p>Actions ▾ View ▾ Format ▾</p> <p>Duplicate</p> <p>Export to Excel</p> <p>Cancel Requisition</p> <p>Withdraw and Edit</p> <p>Reassign</p> <p>View Document History</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 Yes button.</p>  <p>The dialog box contains the following text: Warning This requisition is approved or pending approval. It will be removed from the approval or order creation process so you can make changes. Do you want to continue? Yes No</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 Quantity field and adjust the quantity.</p>



Edit Requisition: 1164

Requisitioning BU: Lucas County

Justification:

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

Rows Selected: 1 Columns Hidden: 8

Line 1: Details

Delivery

Requester: THOMASSON, AMANDA

Deliver-to Location Type: Internal

Requested Delivery Date: 11-05-2019

* Deliver-to Location: Support Services

Suggested Buyer:

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

Billing

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

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

Requisition 1164 was submitted.

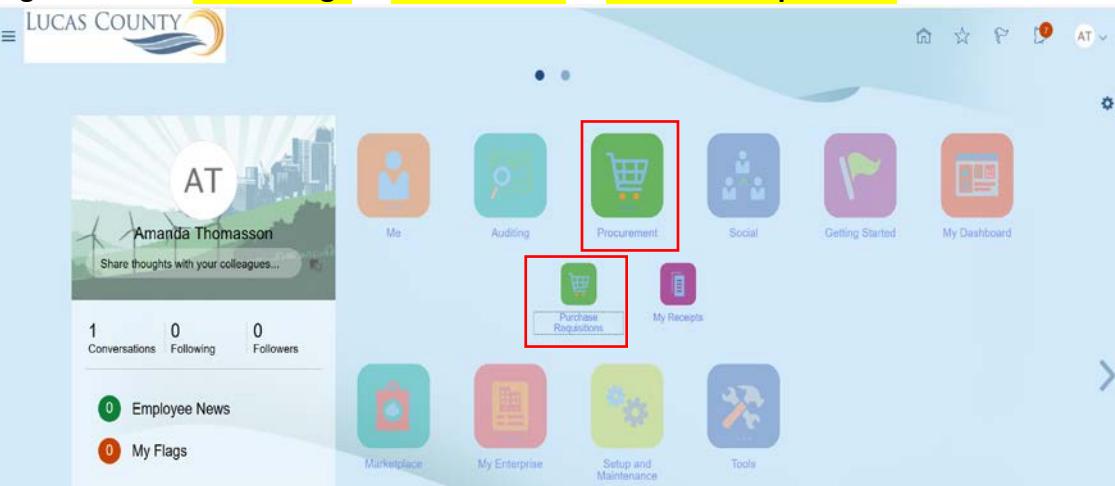
View PDF **OK**



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).

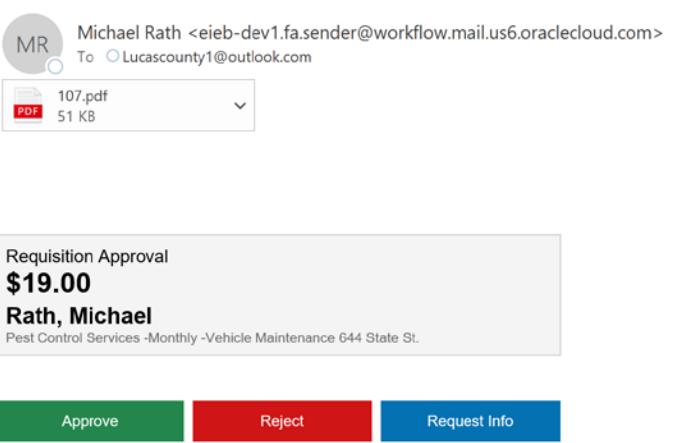
Step	Action
1	Log into Oracle. Home Page -> Procurement -> Purchase Requisitions  A screenshot of the Oracle Home Page. At the top, there is a navigation bar with icons for Home, Star, Flag, Notifications (with a red box around it), and AT. Below the navigation bar is a banner for "Amanda Thomasson" with a "Share thoughts with your colleagues..." button. Underneath the banner are statistics: 1 Conversation, 0 Following, and 0 Followers. The main content area features several icons in a grid: Me (orange), Auditing (teal), Procurement (green, highlighted with a red box), Social (blue), Getting Started (purple), and My Dashboard (red). Below the grid are more icons: Employee News (green), My Flags (orange), Marketplace (teal), My Enterprise (red), Setup and Maintenance (yellow-green), and Tools (blue). A red box also highlights the "Purchase Requisitions" icon in the bottom row.
2	Click the Notifications (Bell icon) at the top right of the page.  A screenshot of the Oracle navigation bar at the top right of the page. It includes icons for Home, Star, Flag, and Notifications (a bell icon with a red box around it and a red number "7" on it).
3	Select Notification: Action Required Approve Requisition.
4	Once you have reviewed the requisition, click the Approve button.



Requisitions Approval from Email

Audience: Approver

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

Step	Action
1	Log into your Email. Select and open the email notification request for approval.
2	<p>View details in the email.</p> <p>Action Required: Approve Requisition 107</p>  <p>The email screenshot shows the following details:</p> <ul style="list-style-type: none">From: Michael Rath <eieb-dev1.fa.sender@workflow.mail.us6.oraclecloud.com>To: Lucascounty1@outlook.comAttachment: 107.pdf (51 KB)Requisition Approval: \$19.00Requisitioner: Rath, MichaelLine Item: Pest Control Services -Monthly -Vehicle Maintenance 644 State St.Buttons: Approve (green), Reject (red), Request Info (blue)Requisition ID: 107Lines: Pest Control Services -Monthly -Vehicle Maintenance 644 State St. Toledo, \$19.00Approval History:<ul style="list-style-type: none">DIANE ROBINSONApplications Development Framework Application Identity for ProcurementAssigned to AMANDA THOMASSON (8/22/19 8:15 AM)Assigned to RUTH ASHFORD (8/22/19 8:15 AM)Submitted by Michael Rath (8/22/19 8:15 AM)Attachment: 107.pdf

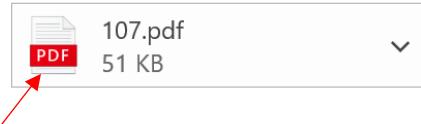


3 In the Action Required section, if attached, click the **PDF** file listed to review the details.

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

Assigned to **AMANDA THOMASSON**

8/22/19 8:15 AM

Assigned to **RUTH ASHFORD**

8/22/19 8:15 AM

Submitted by **Michael Rath**

8/22/19 8:15 AM

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	1 of 1																																																																																													
Requisitioning BU Entered By Status Description	Lucas County Michael Rath Pending approval Pest Control Services - Monthly -Vehicle Maintenance 644 State St. Toledo	Requisition Amount Approval Amount Procurement Card Justification	19 USD 19 USD																																																																																														
Emergency Requisition	No	Funds Status	Not reserved																																																																																														
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2 If the requisition details meet the criteria for approval, click the button to: **Approve**. The Oracle system will provide a notification of the approved status to the Requisitioner.

Approve **Reject** **Request Info**

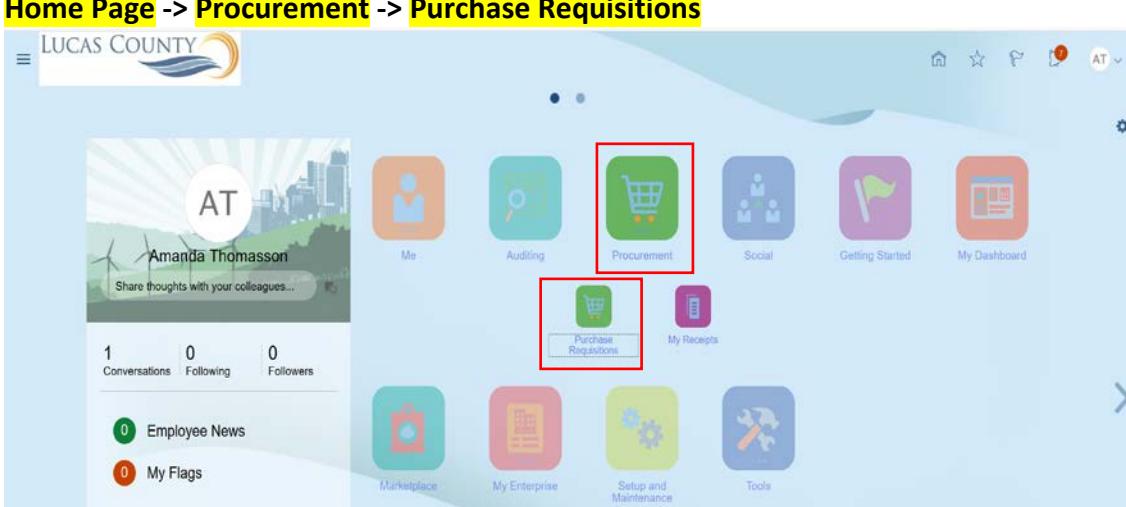
Note: **Approve** will allow the requisition to source. **Request Info** sends back to the Requisitioner and restarts workflow approvals. **Reject** stops the workflow and the requisition does not proceed. All options will provide a notification of the status to the Requisitioner.

Reject Requisition

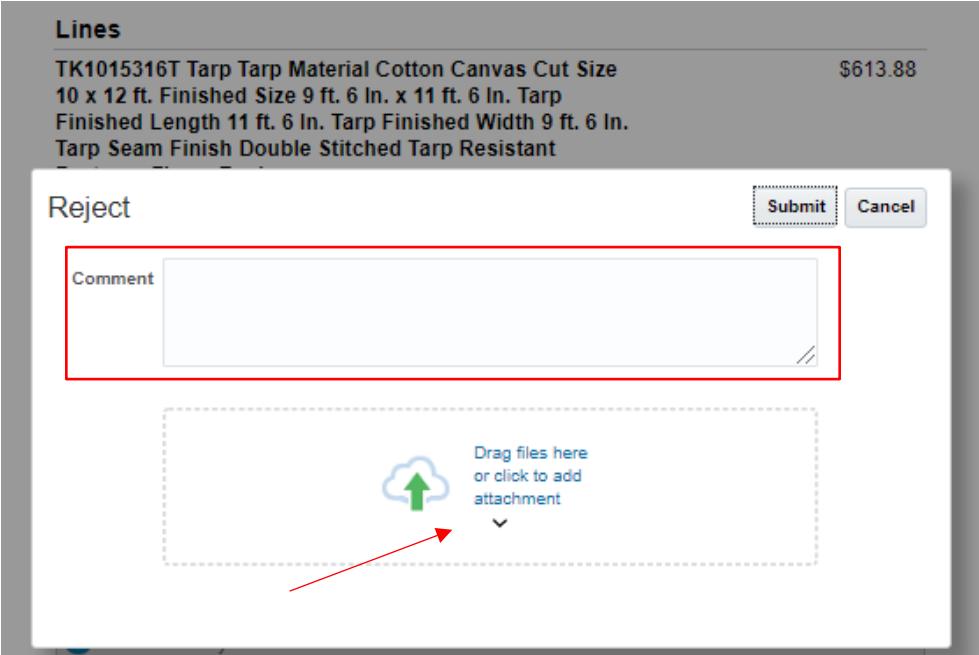
Audience: Requesters, Approvers

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

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

Step	Action
1	<p>Log into Oracle.</p> <p>Home Page -> Procurement -> Purchase Requisitions</p> 
2	<p>Click the Notifications (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 Action Required: Approve Requisition.</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 Actions ▾ <input type="button" value="Approve"/> <input type="button" value="Reject"/></p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <p>Requisition Approval</p> <p>\$613.88</p> <p>THOMASSON, AMANDA</p> <p>TK1015316T Tarp Tarp Material Cotton Canvas Cut Size 10 x 12 ft. F</p> <p style="text-align: center;">Requisition 1164</p> <p>Lines</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">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 style="width: 20%; text-align: right;">\$613.88</td> </tr> <tr> <td>4 x \$153.47</td> <td></td> </tr> <tr> <td colspan="2">Charge Account: 1010.114001.50.630007.00000.00000</td> </tr> </table> <hr/> <p>Approval History</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%; padding: 5px;">Applications Development Framework Application Identity for Procurement</td> <td style="width: 20%; text-align: right; padding: 5px;">10-29-2019 12:54 PM</td> </tr> <tr> <td style="padding: 5px;">Applications Development Framework Application Identity for Procurement</td> <td style="text-align: right; padding: 5px;">10-29-2019 12:54 PM</td> </tr> <tr> <td style="padding: 5px; background-color: #ffffcc;">Assigned to RUTH ASHFORD</td> <td style="text-align: right; padding: 5px;">10-29-2019 12:54 PM</td> </tr> <tr> <td style="padding: 5px;">Submitted by AMANDA THOMASSON</td> <td style="text-align: right; padding: 5px;">10-29-2019 12:54 PM</td> </tr> <tr> <td style="padding: 5px;">1164.pdf</td> <td style="text-align: right; padding: 5px;"></td> </tr> </table> </div>	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	4 x \$153.47		Charge Account: 1010.114001.50.630007.00000.00000		Applications Development Framework Application Identity for Procurement	10-29-2019 12:54 PM	Applications Development Framework Application Identity for Procurement	10-29-2019 12:54 PM	Assigned to RUTH ASHFORD	10-29-2019 12:54 PM	Submitted by AMANDA THOMASSON	10-29-2019 12:54 PM	1164.pdf	
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Submitted by AMANDA THOMASSON	10-29-2019 12:54 PM																
1164.pdf																	
5	<p>Actions are listed in the Actions dropdown for this requisition. For this example, select no actions, but click the Reject button.</p>																

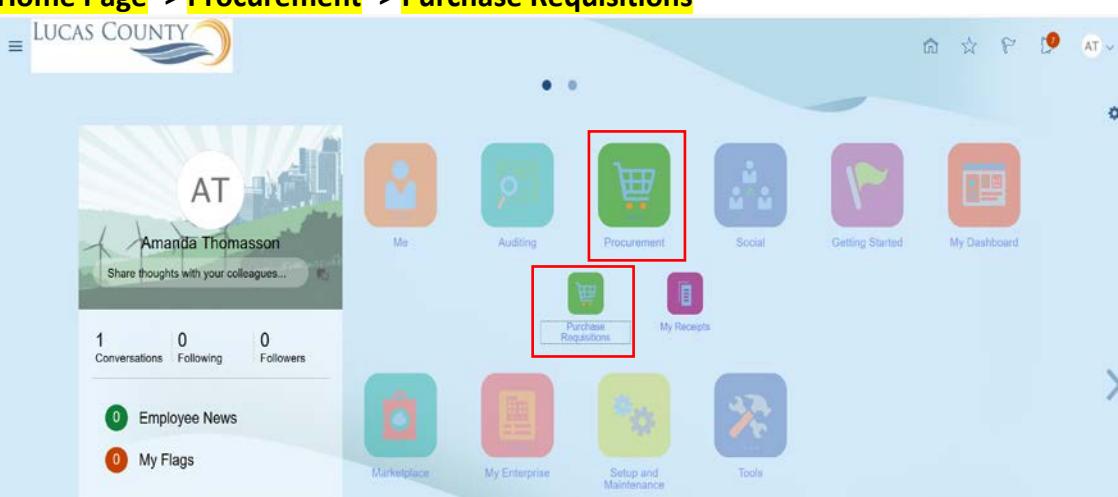
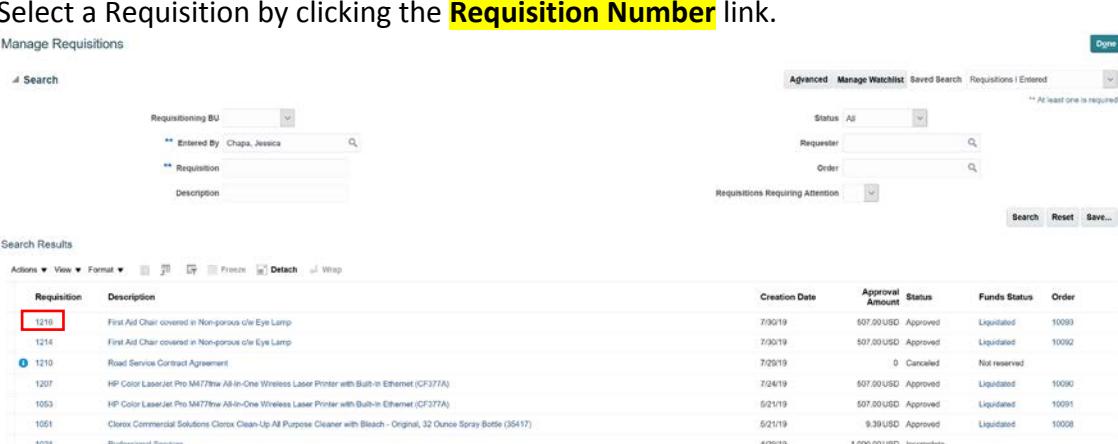
	<div style="border: 1px solid #ccc; padding: 5px; width: 300px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Actions ▾ Approve Reject </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> Request Information Delegate Reassign Escalate Suspend Withdraw Skip Current Assignment Add Comments Add Attachment </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> 
7	<p>Click the Submit button to complete the rejection and send the requisition back through workflow to the Requisitioner.</p> <p style="text-align: center;">Submit</p>



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.</p> <p>Home Page -> Procurement -> Purchase Requisitions</p> 
2	Click the Manage Requisitions link.
3	<p>Select a Requisition by clicking the Requisition Number link.</p> 
4	Click the View Life Cycle button.



Requisition: 1216

Requisitioning BU	Lucas County	Creation Date	7/30/19	Requisition Amount	507.00 USD																								
Entered By	Jessica Chapa	Status	Approved	Approval Amount	507.00 USD																								
Description	First Aid Chair covered in Non-porous c/w Eye Lamp.	Justification		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 ▾ <input type="checkbox"/> Freeze <input type="checkbox"/> Detach <input type="checkbox"/> Wrap <table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Category Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Amount (USD)</th> <th>Status</th> <th>Funds Status</th> <th>Order</th> <th>Line Life Cycle</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>First Aid Chair covered in Non-porous c/w Eye Lamp</td> <td>345</td> <td>1</td> <td>Each</td> <td>507.00 USD</td> <td>507.00</td> <td>Approved</td> <td>Liquidated</td> <td>10290</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>						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 c/w Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10290	<input type="checkbox"/>
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1		First Aid Chair covered in Non-porous c/w Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10290	<input type="checkbox"/>																		
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: CH70 Agreement: 10007 (Lucas County) Agreement Line: 72																													
<input type="checkbox"/> Billing																													
Actions ▾ View ▾ Format ▾ <input type="checkbox"/> Freeze <input type="checkbox"/> Detach <input type="checkbox"/> Wrap																													

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

Requisition Life Cycle: 1216

<input type="checkbox"/> Requisition Line																									
Actions ▾ View ▾ Format ▾ <input type="checkbox"/> Freeze <input type="checkbox"/> Detach <input type="checkbox"/> Wrap																									
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Line	Item	Description	Category Name	Requester	Quantity	UOM	Price	Amount (USD)	Status																
1		First Aid Chair covered in Non-porous c/w Eye Lamp	345	Chapa, Jessica	1	Each	507.00 USD	507.00	Approved																
<input type="checkbox"/> Order																									
Procurement BU: Lucas County Requisitioning BU: Lucas County Purchase Order: 10290 Description: Open Date: 7/30/19 Total: 507.00 USD																									
Status: Open Buyer: Jessica Chapa Supplier: McKesson Medical-Surgical Government Solutions, LLC																									
<input type="checkbox"/> Shipments																									
Actions ▾ View ▾ Format ▾ <input type="checkbox"/> Freeze <input type="checkbox"/> Detach <input type="checkbox"/> Wrap																									
<table border="1"> <thead> <tr> <th>Shipment</th> <th>Shipped Date</th> <th>Expected Receipt Date</th> <th>Ship-to Location</th> <th>Carrier</th> <th>Tracking Number</th> </tr> </thead> <tbody> <tr> <td colspan="6">No data to display</td> </tr> </tbody> </table>						Shipment	Shipped Date	Expected Receipt Date	Ship-to Location	Carrier	Tracking Number	No data to display													
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Invoice	Description	Invoice Date	Status	Invoice Total	Paid Amount	Unpaid Amount	Matched to Order Amount	Currency																	
073040		7/30/19	Not validated	507.00	507.00	507.00	507.00	USD																	

6 Note the Requisition **Status**.

Requisition: 1216

Requisitioning BU	Lucas County	Creation Date	7/30/19	Status	Approved	Requisition Amount	507.00 USD																						
Entered By	Jessica Chapa	Justification		Approval Amount	507.00 USD																								
Description	First Aid Chair covered in Non-porous c/w Eye Lamp.	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 ▾ <input type="checkbox"/> Freeze <input type="checkbox"/> Detach <input type="checkbox"/> Wrap																													
<table border="1"> <thead> <tr> <th>Line</th> <th>Item</th> <th>Description</th> <th>Category Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Amount (USD)</th> <th>Status</th> <th>Funds Status</th> <th>Order</th> <th>Line Life Cycle</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td>First Aid Chair covered in Non-porous c/w Eye Lamp</td> <td>345</td> <td>1</td> <td>Each</td> <td>507.00 USD</td> <td>507.00</td> <td>Approved</td> <td>Liquidated</td> <td>10290</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>						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 c/w Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10290	<input type="checkbox"/>
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 c/w Eye Lamp	345	1	Each	507.00 USD	507.00	Approved	Liquidated	10290	<input type="checkbox"/>																		

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: Chapa, Jessica

** Entered By: Chapa, Jessica

** Requisition:

Description:

Advanced Manage Watchlist Saved Search Requisitions I Entered

Status: All

Requester:

Order:

Requisitions Requiring Attention

Search Reset Save... Done

At least one is required

Actions View Format

Export to Excel

Cancel Requisition

Reassign

Edit Order

View Document History

10093: Chair covered in Non-porous o/w Eye Lamp

10092: Chair covered in Non-porous o/w Eye Lamp

10000: Service Contract Agreement

10001: LaserJet Pro M477nw All-in-One Wireless Laser Printer with Built-In Ethernet (CF377A)

10002: LaserJet Pro M477nw All-in-One Wireless Laser Printer with Built-In Ethernet (CF377A)

10003: Clorox Commercial Solutions Clorox Clean-Up All Purpose Cleaner with Bleach - Original, 32 Ounce Spray Bottle (56417)

1024: Professional Services

Creation Date: 7/30/19

Approval Amount: 507.00 USD

Status: Approved

Funds Status: Liquidated

Order: 10093

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: Chapa, Jessica

Requisitioning BU: Lucas County

Requisition: 1216

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

Status: Approved

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: Aslund, Ruth 7/30/19 3:39 PM:

Reserve: Application 7/30/19 3:39 PM:

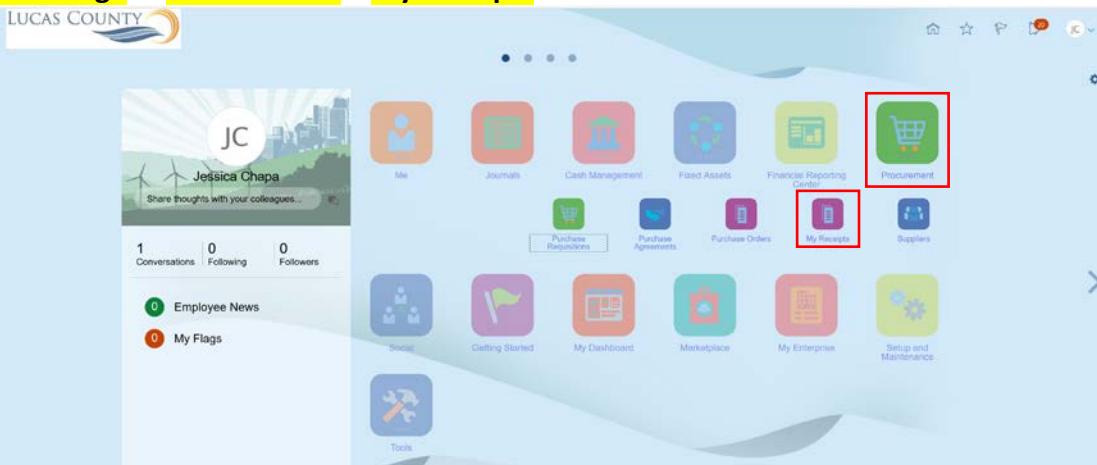
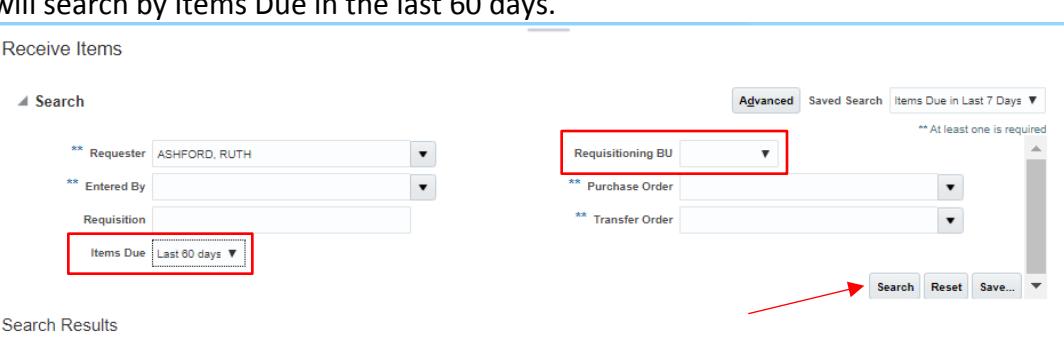
10 Once review is complete, click the **Done** button to return to Requisition Details page.

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



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

Receive Items

▶ Search

Search Results

Requisitioning BU	Requisition	Line	Item Description	Supplier	Need-by Date	Ordered		
						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

Actions ▾ View ▾ Format ▾

Requisition	Item Description	Receipt	* Transaction Date	Waybill	Packing Slip	Requisitioning BU	Purchase Order	Transfer Order
		* Quantity	UOM Name	Currency				
1159	Logitech M310 USB ...	1	Each		10-29-2011		Lucas County	190078

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

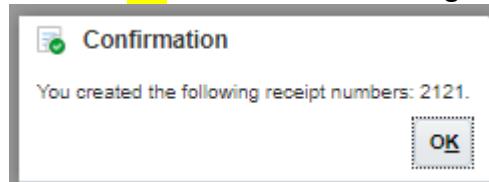
Create Receipts

Actions ▾ View ▾ Format ▾

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

Click the **Submit** button.

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

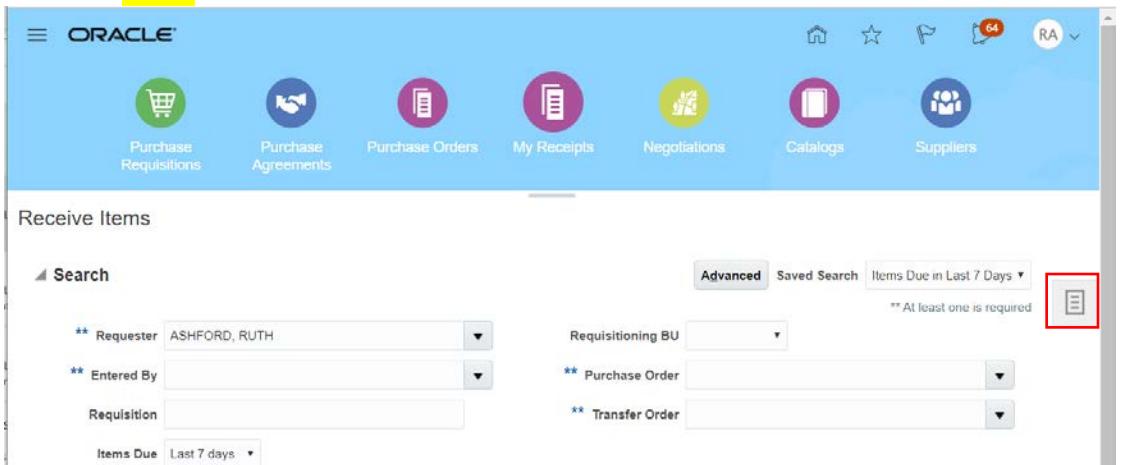


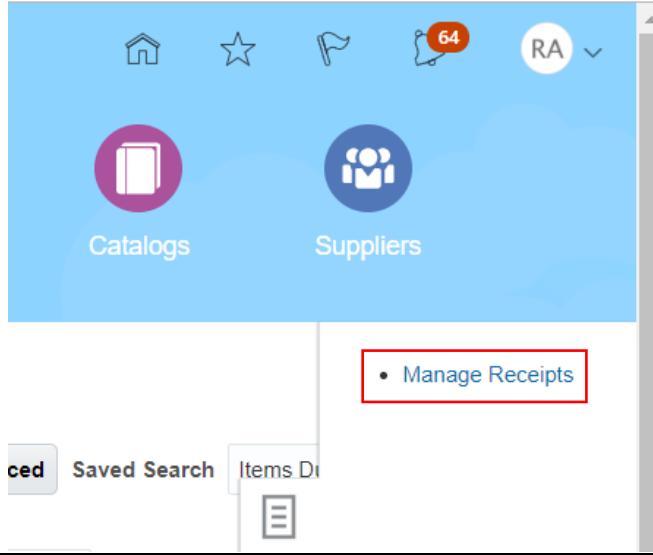
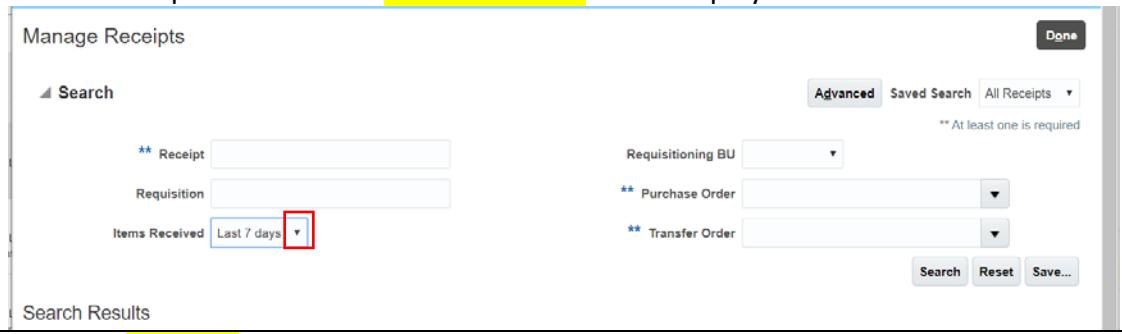


Perform Receiving Corrections

Audience: Requesters, Receivers

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

Step	Action
1	Log into Oracle Home Page -> Procurement > My Receipts 
2	Click the My Receipts button.
3	Click the Tasks icon. 
4	Click the Manage Receipts link.

	
5	<p>Click the dropdown arrow in Items Received list to display the values:..</p> 
6	<p>Click the Anytime option from this list.</p> <p>Manage Receipts</p> <p>Search</p> <p>** Receipt</p> <p>Requisition</p> <p>Items Received Last 7 days ▾</p> <p>Last 60 days</p> <p>Last 30 days</p> <p>Last 7 days</p> <p>Last 3 days</p> <p>Yesterday</p> <p>Today</p> <p>Any time</p> <p>Actions ▾ View ▾ Format</p> <p>Requisitioning BU</p> <p>Recep</p> <p>Description</p> <p>Columns Hidden 5</p>
7	<p>Click the Requesting BU field and select the Business Unit.</p> <p>In addition, at least one of the following must be entered to produce results from this page:</p>



Receipt, Purchase Order, or Transfer Order.

8 Click the **Search** button and highlight the receipt for correction.

Manage Receipts

Search

Search Results

Requisitioning BU	Receipt	Item Description	Supplier	Received			Receipt Date	Purchase Order	Transfer Order	Shipment
				Quantity	UOM Name	Currency				
Lucas County	2004	FA Equipment	Compass Rose Soluti...	1	Each		5/21/19 3:18...	10009		
Lucas County	2005	HBO Pack!	Compass Rose Soluti...	2	Each		5/21/19 6:19...	10011		
Lucas County	2006	Spanish Pack!	Compass Rose Soluti...	2	Each		5/21/19 11:0...	10012		
Lucas County	2009	Test	E Technologies, Inc.	5	Each		6/3/19 11:09...	10035		

9 Click the **Correct** button.

10 Click in the ***Correct Quantity** field and update the quantity.

Correct Receipts

Requisitioning BU	Receipt	Item Description	Supplier	Received			* Correct Quantity
				Quantity	UOM Name	Currency	
Lucas County	2005	HBO Pack!	Compass Rose ...	2	Each		1
Columns Hidden: 1							

11 Click the **Submit** button.

12 Click the **OK** button.

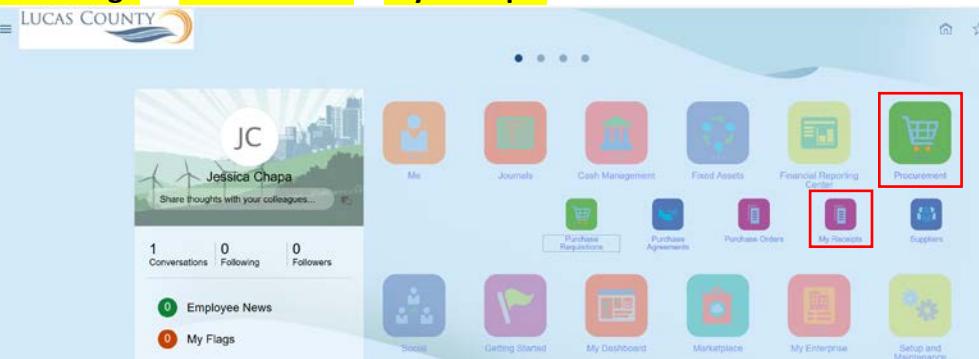
13 Click the **Done** button.



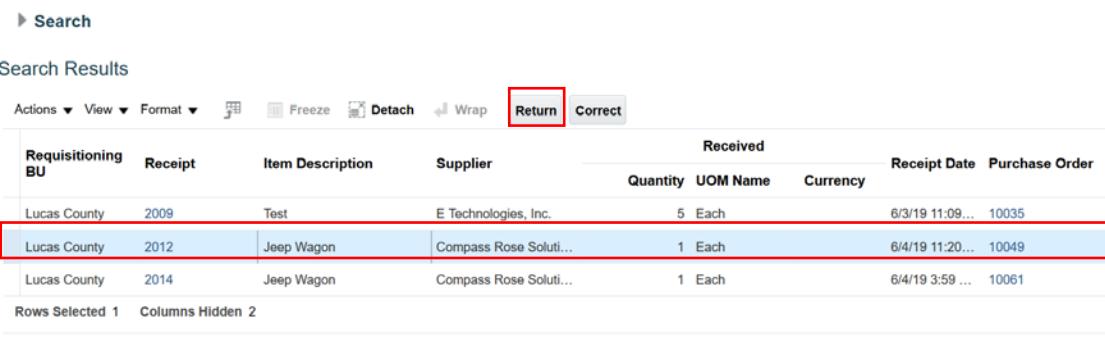
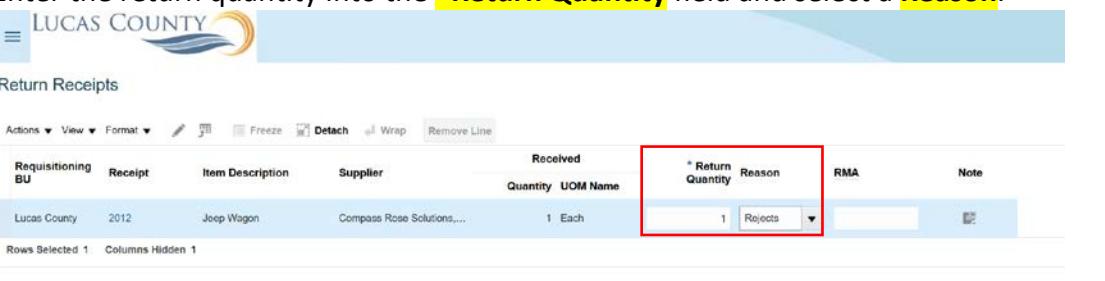
Create Returns to Receipts

Audience: Requesters, Receivers

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

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



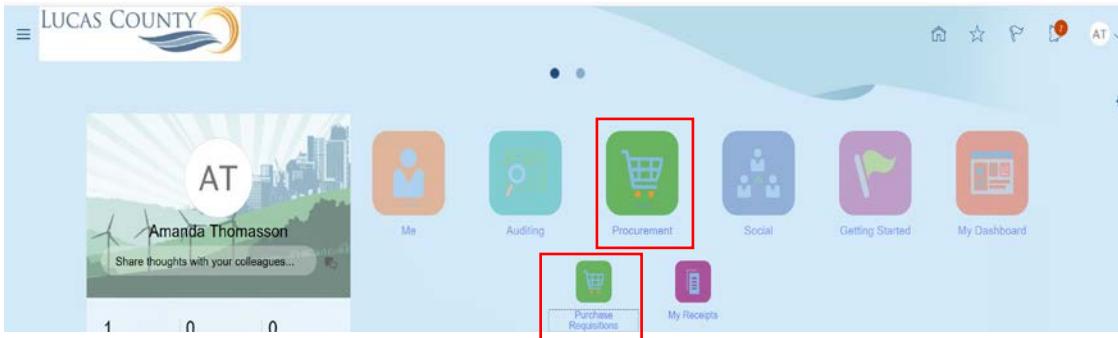
7	Click the Search button.																																							
8	Select a row to be returned and click the Return button.  A screenshot of a Microsoft Excel-like interface titled "Manage Receipts". The "Search Results" section shows a table with the following data: <table border="1"><thead><tr><th 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> Row 2012 is selected and highlighted with a red box. The "Return" button in the top right is also highlighted with a red box. Rows Selected 1 Columns Hidden 2	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																												
		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																																
9	Click in the *Return Quantity field.																																							
10	Enter the return quantity into the *Return Quantity field and select a Reason .  A screenshot of a Microsoft Excel-like interface titled "Return Receipts". The table shows a single row of data: <table border="1"><thead><tr><th>Requisitioning BU</th><th>Receipt</th><th>Item Description</th><th>Supplier</th><th>Received</th><th>* Return Quantity</th><th>Reason</th><th>RMA</th><th>Note</th></tr><tr><th>Quantity</th><th>UOM Name</th><th></th><th></th><th>Quantity</th><th>UOM Name</th><th></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></tr></tbody></table> The "Reason" dropdown menu is open, showing "Rejects" as the selected option. The "Return Quantity" cell is also highlighted with a red box. Rows Selected 1 Columns Hidden 1	Requisitioning BU	Receipt	Item Description	Supplier	Received	* Return Quantity	Reason	RMA	Note	Quantity	UOM Name			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			Quantity	UOM Name																																			
Lucas County	2012	Jeep Wagon	Compass Rose Solutions...	1	Each	1	Rejects																																	
11	Click the Submit button.																																							
12	Click the OK button.																																							



Edit Order

Audience: Requesters

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

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

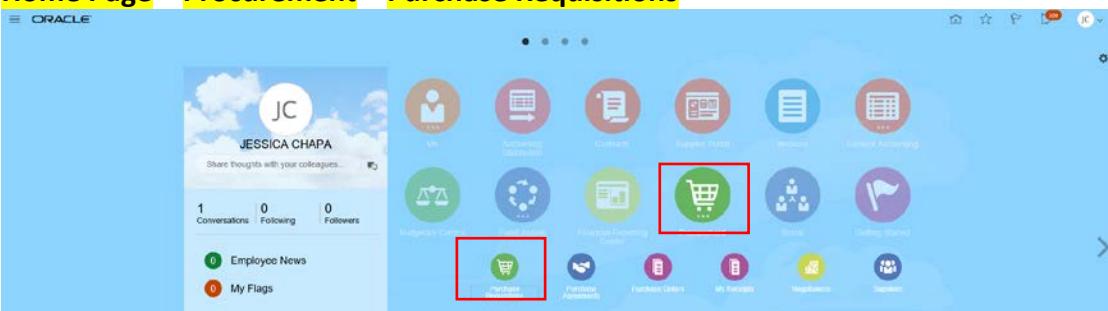
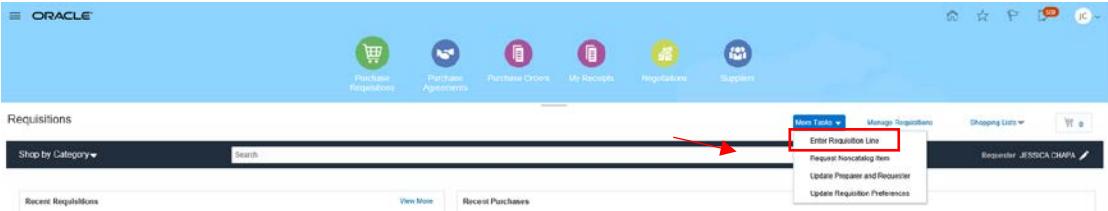


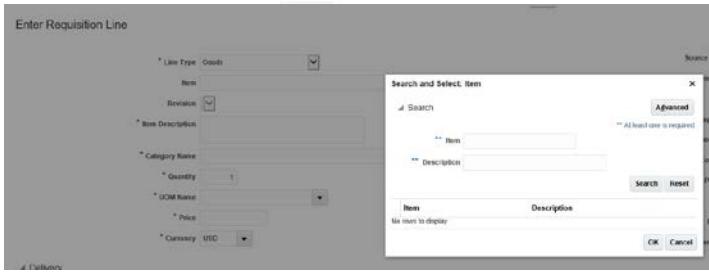
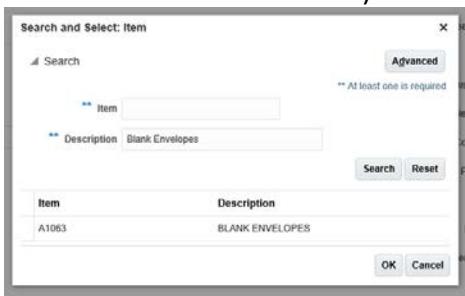
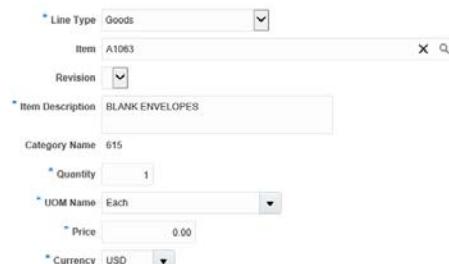
8	Enter Description of the Change  A screenshot of a software interface titled "Edit Change Order: 1". The "Description" field is highlighted with a red border and contains the text "Gas 2500 Gallon". A validation error message box is displayed: "Error: A value is required. You must enter a value." The "Notes" field is set to "Incomplete". The "Entered/Changed" date is "11-20-2019". The "Funds Status" is "Not applicable". The top right of the screen shows buttons for "CLOCK TIME", "MAP/VIEW ADDRESS", "Actions", "Save", "Cancel", and "Close".
9	Perform necessary changes to the Order.
10	Enter Change Reason  A screenshot of a software interface titled "Actions ▾ View ▾ Format ▾ X Detach ▾ Wrap". The main area shows a table with one row. The columns are "Line", "Type", "Edit Item", "Description", "Category Name", "Quantity", "UOM", "Price", "Ordered", "Location", "Change Order Funds Status", and "Change Reason". The single row contains: Type "Amount Based", Description "Gas 2500 Gallon", Category Name "405", Quantity "23.00", UOM "Gallons", Price "23.00", Ordered "0", Location "Support Svc", Change Order Funds Status "Not Applicable", and Change Reason "Price adjustment". A note at the bottom says "Columns Hidden: 40".
11	Click the Save button.
12	Click the Submit button. The Order will be sent for approval.
13	Click the OK button.

Create Requisition Line Entry for Item Master Items

Audience: Requesters

Purpose: An order is a formal authorization to purchase goods or services. Your purchasing department creates a purchase order, which a supplier receives. A purchase order can be tracked until you receive the goods or services. A requisition is a request for the goods or services. If approved, a purchase order is created to fulfill the requisition. If details. The Requisitions page is the landing page for the Purchase Requisitions work area and is also informally referred to as the shopping home page. Requesters can use the self-service page to place purchase requests for goods or services. Item Master Items can be selected and will prefill certain information (Description, Category Code and Unit of Measure) to simplify requisition entry for commonly 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>Home Page > Procurement > Purchase Requisitions</p> 
2	<p>Click the More Tasks > Enter Requisition Line link.</p> 
3	<p>Click the Line Type list.</p>
4	<p>Select the Goods list item.</p> 
5	<p>Select the Item Search icon</p>

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



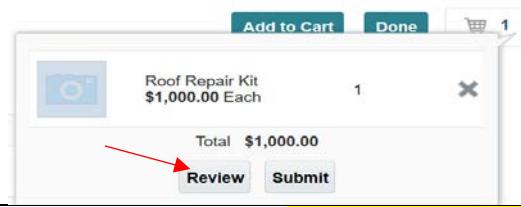
10	<p>In the Notes and Attachments section, click the + icon next to Attachments None.</p>
11	In the Attachments window click the Type list.
12	Select the File list item.
13	Click the Category list.
14	Click to select the To Buyer list item.
15	Click the Browse button under *File Name or URL field.
16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



Enter Requisition Line

Line Type: Goods		Source Type: Supplier		
Item	Supplier	Agreement	Supplier	
Revision	New supplier	Supplier	Supplier	
* Item Description: Roof Repair Kit	Supplier Site	Supplier Contact	Supplier Item	
* Category Name: 910	Phone	Fax	Email	
* Quantity: 1	Supplier Item			
* UOM Name: Each	Supplier Item			
* Price: 1,000.00	Supplier Item			
* Currency: USD	Supplier Item			
Delivery				
* Requester: Thomasson, Amanda	Deliver-to Location Type: Internal			
Requested Delivery Date: 8/5/19	* Deliver-to Location: Support Services			
Suggested Buyer: Chapa, Jessica	Deliver-to Address: 1 Government Center, Suite 480, TOLEDO, OH 43604, UNITED STATES			
Billing				
View Format <input type="button" value="Freeze"/> <input type="button" value="Detach"/> <input type="button" value="Wrap"/>				
Project Costing Details <input type="button" value="Delete"/>				
Project Number	Task Number	Expenditure Item Date	Expenditure Type	
Expenditure Organization	Charge Account	* Budget Date	* Percentage	
		Quantity	Amount (USD)	
		100	1,000.00	
		Funds Status		
		LCCSB Tracking Code		
1010.114001.50 510901.0000.00	7/29/19	100	1,000.00	Not reserved

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



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

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

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

24 Select Y/N ***Resolution Attached**.

25 Select Y/N ***Will Services be performed on Lucas County property?**

26 Click the **Check Funds** button.

27 Click the **View Funds Check Results** button.

28 Click the **Done** button.

29 Click the **OK** button.

30 Click the **Manage Approvals** button.

31 Click the **Submit** button.

32 Click the **OK** button.