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|---------------------------------|----------------------|
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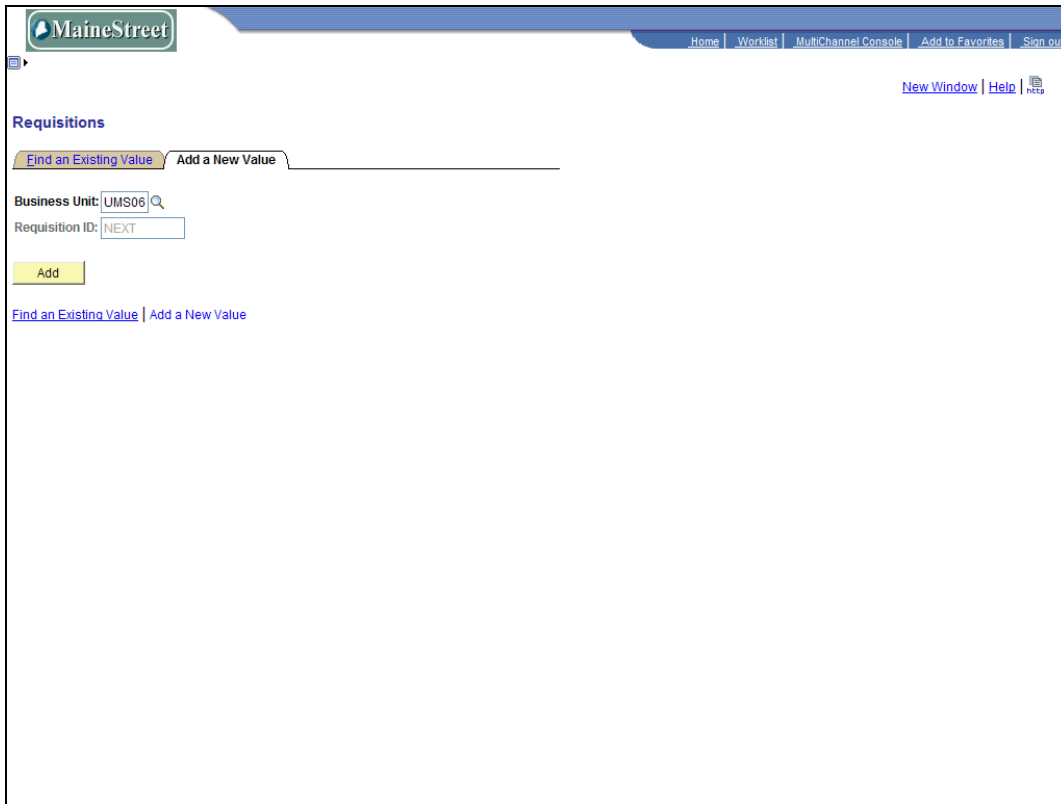
## **Copying a Requisition**

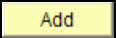
### **Concept**

Copying an existing requisition enables you to create a requisition without having to spend time entering all the required data. Copying eliminates redundant data entry by using an existing requisition as a template.

## Navigation

| Step | Action   |
|------|--|
| 1.   | From the Financials menu, click the <b>Purchasing</b> link.<br> |
| 2.   | Click the <b>Requisitions</b> link.  |
| 3.   | Click the <b>Add/Update Requisitions</b> link.   |



| Step | Action  |
|------|---|
| 4.   | Click the <b>Add</b> button.<br> |



# Process Document

## Financials 9.0: Copying a Requisition



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### Maintain Requisitions

#### Copy Requisition

Header

Business Unit: UMSOR

Requisition ID:

Req Status:  Origin:

Requester:

Requester Name:

Requisition Date:  To:

Vendor SetID: UMSYS [Vendor Lookup](#)

Vendor ID:  [Vendor Details](#) Vendor Name:

Item SetID: UMSYS Item ID:

Item Description:   Direct Ship


Department:

Search

| Requisition              | Status | Origin | Requester |
|--------------------------|--------|--------|-----------|
| <input type="checkbox"/> |        |        |           |

OK Cancel Refresh

| Step | Action  |
|------|---|
| 6.   | On the <b>Copy Requisition</b> page, enter look up criteria for the requisition you wish to copy. |



**Maintain Requisitions**

### Copy Requisition

Header

Business Unit: UMS06

Requisition ID: 6000012718

Req Status:  Origin:

Requester:

Requester Name:

Requisition Date:  To:

Vendor SetID: UMSYS [Vendor Lookup](#)

Vendor ID:  [Vendor Details](#) Vendor Name:

Item SetID: UMSYS Item ID:


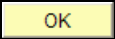
Item Description:   Direct Ship

Department:

**Search**

| Requisition              | Req ID | Status | Origin | Requester |
|--------------------------|--------|--------|--------|-----------|
| <input type="checkbox"/> |        |        |        |           |

OK Cancel Refresh

| Step | Action  |
|------|---|
| 7.   | After entering the look up criteria, click the <b>Search</b> button.<br>   |
| 8.   | Requisitions that match the criteria you entered will appear listed in the <b>Requisition</b> section of the page. If multiple requisitions are listed, place a checkmark adjacent to the requisition you wish to copy.<br><br>When ready, click the <b>OK</b> button to create the requisition.<br> |

# Process Document

## Financials 9.0: Copying a Requisition



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Maintain Requisitions

Requisition

Business Unit: UMS06

Requisition ID: NEXT [Copy From](#)

Status: Pending

Budget Status: Not Chk'd

Hold From Further Processing

Header

\*Requester: 0099999 Requester Name [Requisition Defaults](#)

Requisition Date: 06/25/2008 [Requester Info](#) [Edit Comments](#)

Origin: ONL On-line entry [Requisition Activities](#)

\*Currency Code: USD Dollar

Accounting Date: 06/25/2008

Amount Summary

Total Amount: 750.00 USD

Line


Details | Ship To/Due Date | Status | Vendor Information | Item Information | Attributes | Contract | Sourcing Controls
Customize | Find | View All |

| Line | Item | Description      | Quantity | UOM | Category | Price     | Amount | Status  |
|------|------|------------------|----------|-----|----------|-----------|--------|---------|
| 1    |      | Reservations for | 1.0000   | EA  | MISC     | 750.00000 | 750.00 | Pending |

\*Go to: [...More...](#)

Save
 Notify
 Refresh

Add
 Update/Display

| Step | Action  |
|------|---|
| 9.   | <p>At this point, you have the option of updating any field as necessary prior to saving the Requisition.</p> <p><b>NOTE:</b> If you use the <a href="#">Requisition Defaults</a> link to make changes, you will need to complete the <b>Retrofit</b> page.</p> <p>This page enables you to retrofit the default field value changes to lines, schedules and distributions on a requisition without having to apply them to each area. You can make the changes once and apply as many of them as you want to the transaction.</p> <p>Select the <b>Apply</b> checkbox to apply the default field value change to the distribution line that appears in the <i>Distrib Line</i> field. For example, if you select <b>Apply</b> for the distribution line 1, the change will be applied to each distribution line 1 that appears on the purchase order.</p> <p>If the Distrib Line field is blank, this means the default field value change does not apply at the distribution level. In this case, select the <b>Apply</b> option to carry the default field value change to the line or schedule level instead.</p> <p>For this example, we will click the <b>Select All</b> checkbox to apply the default field value change to all existing distribution lines on the transaction, regardless of the distribution line value that appears.</p> <p>When ready, click the <b>Save</b> button.</p>  |



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### Maintain Requisitions

#### Requisition

**Business Unit:** UMS06      **Status:** Pending  
**Requisition ID:** 6000012719      [Copy From](#)      **Budget Status:** Not Chk'd   
 **Hold From Further Processing**

**Header**

**\*Requester:** 0098999  Requester Name      [Requisition Defaults](#)  
[Requester Info](#)  
**Requisition Date:** 06/25/2008      [Edit Comments](#)  
**Origin:** ONL      On-line entry      [Requisition Activities](#)  
**\*Currency Code:** USD      Dollar  
**Accounting Date:** 06/25/2008

**Amount Summary**

**Total Amount:** 750.00 USD

**Add Items From**      **Select Lines To Display**

[Purchasing Kit](#)      [Catalog](#)      **Line:**  **To:**  [Retrieve](#)  
[Item Search](#)      [Requester Items](#)

| Customize   Find   View All    First 1 of 1 Last   |      |                  |          |      |          |           |        |         |  |
|--|------|------------------|----------|------|----------|-----------|--------|---------|--|
| Details    Ship To/Due Date    Status    Vendor Information    Item Information    Attributes    Contract    Sourcing Controls |      |                  |          |      |          |           |        |         |  |
| Line   | Item | Description      | Quantity | *UOM | Category | Price     | Amount | Status  |  |
| 1  |      | Reservations for | 1.0000   | EA   | MISC     | 750.00000 | 750.00 | Pending |  |

\*Go to:

Save    Notify    Refresh

Add    Update/Display

| Step | Action                   |
|------|--------------------------|
| 11.  | <b>End of Procedure.</b> |