

Security Role	BOR_PO_MAINTAIN
Responsibility/Role	
File Name	PO_020_120 - Creating a PO by Copying a Requisition_BUSPROC.docx
Version	
Document Generation Date	12/15/2010
Date Modified	2/19/2019
Last Changed by	
Status	

PO.020.120 - Creating a PO by Copying a Requisition

Trigger:

Concept

This topic demonstrates how to create a Purchase Order by copying an existing Requisition. Purchase Orders can be created in three ways – by entering all fields manually, or by copying an existing Requisition or Purchase Order. Copying enables you to reduce the amount of time spent on redundant data entry.

Topic Objectives:

Upon completion of this topic, you will be able to:

- Identify the benefit of creating a Purchase Order by copying a Requisition.
- Create a Purchase Order by copying a Requisition.

Assumptions

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Dependencies/Constraints

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Additional Information






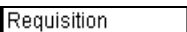

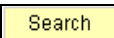



Business Process Document

Purchasing - Purchase Orders PO.020.120 - Creating a PO by Copying a Requisition





Procedure

In this topic, you will create a Purchase Order by copying a Requisition. The Purchase Order is for an ice chest and a personal cooler.

Step	Action
1.	Begin by navigating to the Purchase Order page. Click the Purchasing link. 
2.	Click the Add/Update POs link. 
3.	Click the Add button. 
4.	Use the Purchase Order page to enter or change PO information online.
5.	You must enter a vendor ID before you can copy a purchase order from an existing requisition. Click in the *Vendor ID field. 
6.	Enter "000000045" in the *Vendor ID field.
7.	Click the Copy From list. 
8.	Select Requisition to access the Copy Purchase Order From Requisition page, where you can copy the purchase order from an existing requisition. Click the relevant entry in the Copy From list. 
9.	Use the Copy Purchase Order from Requisition page to select criteria to search for existing requisition items and select the desired items for copy.
10.	Click in the Vendor ID field. 
11.	Enter "000000045" in the Vendor ID field.
12.	Click the Search button. 
13.	Notice that a number of requisition lines corresponding to the specified vendor ID are displayed. Click the Sel checkbox. 
14.	Click the Sel checkbox. 
15.	Click the Sel checkbox. 

Business Process Document

Purchasing - Purchase Orders PO.020.120 - Creating a PO by Copying a Requisition

Step	Action
16.	Click the vertical scrollbar.
17.	Click the Copy To PO button. 
18.	Notice that the page displays the details of the items that you selected to copy.
19.	Click the Save button. 
20.	Notice that the system has automatically assigned the PO ID.
21.	<p>Congratulations. You have just completed the Creating a PO by Copying a Requisition topic. Below is a summary of the key concepts of this topic:</p> <ul style="list-style-type: none"> - When copying Purchase Orders into Requisitions, you can select which lines and schedules you want to copy. - You must enter a Vendor ID before you can copy a Requisition. <p>End of Procedure.</p>