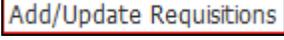
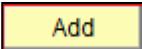
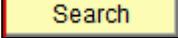
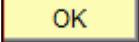
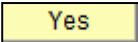


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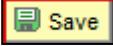
| Step | Action |
|------|--|
| 1. | <p>Scenario</p> <p>You may copy your own requisitions or the requisition of another Requester. In this exercise you will enter a new requisition by copying a requisition from another Requester using the Copy From option.</p> |
| 2. | <p>When copying a requisition you will <u>not</u> perform Step 1: Enter Requisition Defaults. The defaults, line item(s), distribution of funds, and comments are being brought into the new requisition from the requisition that is being copied. Once copied, the Requester will make any necessary additions/changes/deletions to the line items, Schedule page, Distribution page and/or Comments page.</p> <p><i>NOTE: It is recommended to enter a new requisition rather than copying a requisition if extensive changes will be made to the copied requisition.</i></p> |
| 3. | <p>Click the Main Menu button.</p>  |
| 4. | <p>Click the Purchasing menu.</p>  |
| 5. | <p>Click the Requisitions menu.</p>  |
| 6. | <p>Click the Add/Update Requisitions menu.</p>  |
| 7. | <p>A new requisition must be added in order to copy a requisition.</p> <p>Enter the desired information into the Business Unit field. Enter "BRFHS".</p> |
| 8. | <p>Click the Add button.</p>  |
| 9. | <p>Click the Hold From Further Processing option.</p>  |
| 10. | <p>Requisition Name – this is a free text field and can be used to enter a description of the items being purchased. If the field is not populated upon saving it will be populated with the requisition id.</p> |

| Step | Action |
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| 11. | <p>Copy a Prior Year Requisition for Next Fiscal Year</p> <p>In this exercise you are copying a requisition for the same fiscal year. When you are copying an existing requisition (i.e. from the current or a prior fiscal year) into a requisition for the next fiscal year, the Accounting Date <u>must</u> be changed. The Accounting Date change <u>must</u> be made prior to copying the old requisition into the new requisition so the Budget Period defaults to the next fiscal year. If the Budget Period is not correct, an error message will be received when saving the requisition stating that the Accounting Date and Budget Period do not match. The Due Date <u>must</u> also be changed to reflect receipt in the next fiscal year. The Requisition Date may remain as defaulted.</p> <p>The dates must be changed as follows when copying a requisition for the next fiscal year: Accounting Date - 07/01/XX (the next fiscal year); and Due Date - 07/01/XX or later for the next fiscal year.</p> |
| 12. | <p>Click the Copy From link.</p>  |
| 13. | <p>Search for an Existing Requisition to Copy</p> <p>To search for an existing requisition to copy, you may enter all or part of one of the following search criteria:</p> <ul style="list-style-type: none"> • Requisition ID – to view a specific requisition; or • Requester – to view requisitions associated with a specific requester. |
| 14. | <p>Requisition ID</p> <p>It is highly recommended you note your Requisition ID you wish to use when copying a requisition and enter it into the search page. If you do not know the Requisition ID, you may search for it by clicking the Look Up Requisition ID magnifying glass.</p> |
| 15. | <p>Requester</p> <p>You <u>must</u> enter the user id of the person whose requisition you wish to copy in Requester field. The user id <u>must</u> be entered in ALL CAPS. If you enter the requester's name in the Requester field, or enter the user id in lower case, you will receive a warning message stating you entered an invalid value. If you do not know the requester's user id, you may search for it using the following steps.</p> <p><i>NOTE: It is not recommended that any of the remaining options be used when searching for a requester user id.</i></p> |
| 16. | <p>Click the Requester button.</p>  |
| 17. | <p>You will search for the User ID using the Description field. The Description column display users' names. You will enter all or part of the user's Last Name in the Description field.</p> <p>Enter the desired information into the Description field. Enter "Buyer's Last Name".</p> |

| Step | Action |
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| 18. | Click the Look Up button.  |
| 19. | Click the Harold, Carmen P link.  |
| 20. | Click the Search button to view a list of available requisitions for the specified requester.  |
| 21. | You are viewing options 1 - 3 of 24 options for this requester. You can use the right arrow to view the next group of 3 options, or you can click the View All link to view the all 24 options. |
| 22. | Click the View All link.  |
| 23. | Click the Req ID to view requisition information. <i>NOTE: This will open a new window and display the Requisition Inquiry page.</i> Click the 0000034 link.  |
| 24. | The Requisitions page displays. Click the Requisition link to view line items and other requisition details. <i>NOTE: This will take you to the Line Details page.</i> Click the 0000034 link.  |
| 25. | Review the requisition information to determine if this is the requisition you wish to copy. Click the Close button.  |
| 26. | <i>NOTE: If this is not the desired requisition, you will click other Requisition ID links and repeat the previous steps until the desired requisition is located.</i> |
| 27. | When you find the requisition you wish to copy, click the Sel - 0000034 option.  |
| 28. | Click the OK button.  |

| Step | Action |
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| 29. | <p>A message displays to verify you want to copy the selected requisition information onto the new requisition.</p> <p>When you copy a requisition of another Requester, you will receive a message stating that the source requester (i.e. the person whose requisition you are copying) is different from the target requester (i.e. you). This means the defaults brought in from the copied requisition will remain the same once copied into the new requisition. Since this is not your requisition that you are copying, the system is warning you the defaults on the requisition being copied may not be same as the defaults you will be using. If the defaults are different, you will need to make the necessary changes on the Schedule and Distribution pages of the new requisition.</p> <p>Click the Yes button.</p>  |
| 30. | <p>The Requester's User ID for the requisition you copied will default into the Requester field. You must enter your User ID into the Requester field when this occurs. If you were to copy your own requisition, no changes would need to be made to the Requester field.</p> <p>NOTE: You <u>must</u> enter your User ID in ALL CAPS into the Requester field.</p> <p>The information from the copied requisition displays in the new requisition.</p> <p>NOTE: Any changes that you make to the new requisition will not affect the original requisition that you copied.</p> <p>Enter the desired information into the Requester field. Enter "Your User ID".</p> |
| 31. | <p>Click the Requisition Defaults link.</p>  |
| 32. | <p>A warning message displays.</p> <p>Click the Yes button.</p>  |
| 33. | <p>You must either enter default information onto the Requisitions Defaults page or on the Distribution page for each line. In this example, you will make the following changes on the Requisitions Defaults page.</p> <p>Requisition Defaults: Buyer - Delatte, Adam Ship To - BRFHS Due Date - 09/30/13 Account - 545700 Dept - 2036380 Location - N20G0100</p> |

| Step | Action |
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| 34. | Click the Buyer button.  |
| 35. | Enter the desired information into the Name field. Enter " Buyer's Last Name ". |
| 36. | Click the Look Up button.  |
| 37. | Click the Buyer's User ID link.  |
| 38. | Click the Ship To button.  |
| 39. | Click the BRFHS link.  |
| 40. | Click the Due Date button. <i>NOTE: You may also enter the date directly into the Due Date field.</i>  |
| 41. | Click the desired date.  |
| 42. | Enter the desired information into the Account field. Enter " 545700 ". |
| 43. | Enter the desired information into the Dept field. Enter " 2036380 ". |
| 44. | Click the Look up Location button.  |
| 45. | Enter the desired information into the Description field. Enter " NEURO ". |
| 46. | Click the Look Up button.  |
| 47. | Click the N20G0100 link.  |
| 48. | Click the OK button.  |
| 49. | Click the Mark All link.  |
| 50. | Click the OK button.  |
| 51. | Change the Quantity from 4 to 2. Enter the desired information into the Quantity field. Enter " 2 ". |
| 52. | Enter the desired information into the Price field. Enter " 550 ". |

| Step | Action |
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| 53. | Click the Save button.  |
| 54. | A Requisition ID number has been assigned by the system. The Requisition ID is not the Purchase Order (PO) number. A separate PO number will be assigned when the PO is generated. <i>NOTE: If this is a Confirmation Purchase Order, the Requisition ID is the PO number.</i> |
| 55. | If you do not intend to add other line items to the requisition and it is ready for approval, you must uncheck the Hold From Further Processing box and save the requisition. |
| 56. | In this exercise, you will not add another line item and the requisition is ready for approval. Click the Hold From Further Processing option.  |
| 57. | Click the Save button.  |
| 58. | This completes <i>Copy a Requisition</i> . End of Procedure. |