

9.2 Copying a Requisition

Purpose - Use this document as a reference for copying a requisition in ctLink.

Audience: ctLink faculty and staff with a need to purchase goods or services

Copy a Requisition

Navigation: NavBar > Navigator > Purchasing > Requisitions > Add/Update Requisitions

i One of the easiest ways to create a new purchasing requisition in ctLink is to copy an existing one. You can select an existing requisition to copy regardless of its status.

1. The Requisitions search page displays. Select **Add a New Value** tab to create a new value.
 1. If it didn't populate, enter or select the appropriate business unit in the **Business Unit** field.
 2. Leave the default value of NEXT in the **Requisition ID** field.
 3. Select **Add**.

The screenshot shows the 'Requisitions' search interface. At the top, there are three tabs: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'. The 'Add a New Value' tab is highlighted with a red box. Below the tabs, there are two input fields: 'Business Unit' with the value 'WA170' and a search icon, and 'Requisition ID' with the value 'NEXT'. Below these fields is an 'Add' button, which is also highlighted with a red box. At the bottom of the form, there are three links: 'Find an Existing Value', 'Keyword Search', and 'Add a New Value'.

2. The Requisition page displays. Select **Copy From**.

Maintain Requisitions

Requisition

Business Unit WA170 Status Open

Requisition ID NEXT

Requisition Name Copy From Hold From Further Processing

Header ?

*Requester Requester Info

*Requisition Date 08/29/2018 On Line Entry

Origin ONL On Line Entry

*Currency Code USD Dollar

Requisition Defaults Add Comments

Requisition Activities Add Request Document

Amount Summary ?

Total Amount 0.00 USD

Add Items From ?

Purchasing Kit Catalog

Item Search Requester Items

Line ? Personalize | Find | View All | First 1 of 1 Last

Details	Ship To/Due Date	Status	Supplier Information	Item Information	Attributes	Contract	Sourcing Controls				
Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status			
1	<input type="text"/>	<input type="text"/>	0.0000	<input type="text"/>	<input type="text"/>	0	0.00	Open	<input type="button" value="Search"/>	<input type="button" value="Print"/>	<input type="button" value="Refresh"/>

View Printable Version View Approvals *Go to ...More...

3. The Copy Requisition page displays. Use the Header section to mix and match search criteria to locate a requisition to copy. Some possibilities include:
 1. Enter or select the Requisition number in the Requisition ID field. *Note: If an entry is made in this field, there is no value in entering any other search criteria. Simply proceed to step f - select Search.*
 2. Enter or select a status in Req Status.
 3. To display only those requisitions you created, enter or select your name in either Requester Name or Requester.
 4. To display only those requisitions for a specific supplier, enter or select the supplier in either Supplier ID or Supplier Name.
 5. Enter or select the appropriate department in Department.
 6. Select Search.

Req Inquiry Selection

Maintain Requisitions

Copy Requisition

Header

Business Unit WA170

Requisition ID 7 CASAS TE

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID WACTC

Supplier ID

Item SetID WACTC

Item Description

Department

Origin

To

Supplier Name

Item ID

Direct Ship

Search

Requisition					
Sel	Req ID	Requisition Name	Status	Origin	Requester
<input type="checkbox"/>					

OK Cancel Refresh

4. The updated Copy Requisition page displays. The qualifying requisitions will show in the Requisition section. Select the Sel box of the requisition you want to copy, then select OK.

Req Inquiry Selection

Maintain Requisitions

Copy Requisition

Header

Business Unit WA170

Requisition ID 7 CASAS TE

Requisition Name

Req Status

Requester

Requester Name

Requisition Date

Supplier SetID WACTC

Supplier ID

Item SetID WACTC

Item Description

Department

Origin

To

Supplier Name


Item ID

Direct Ship

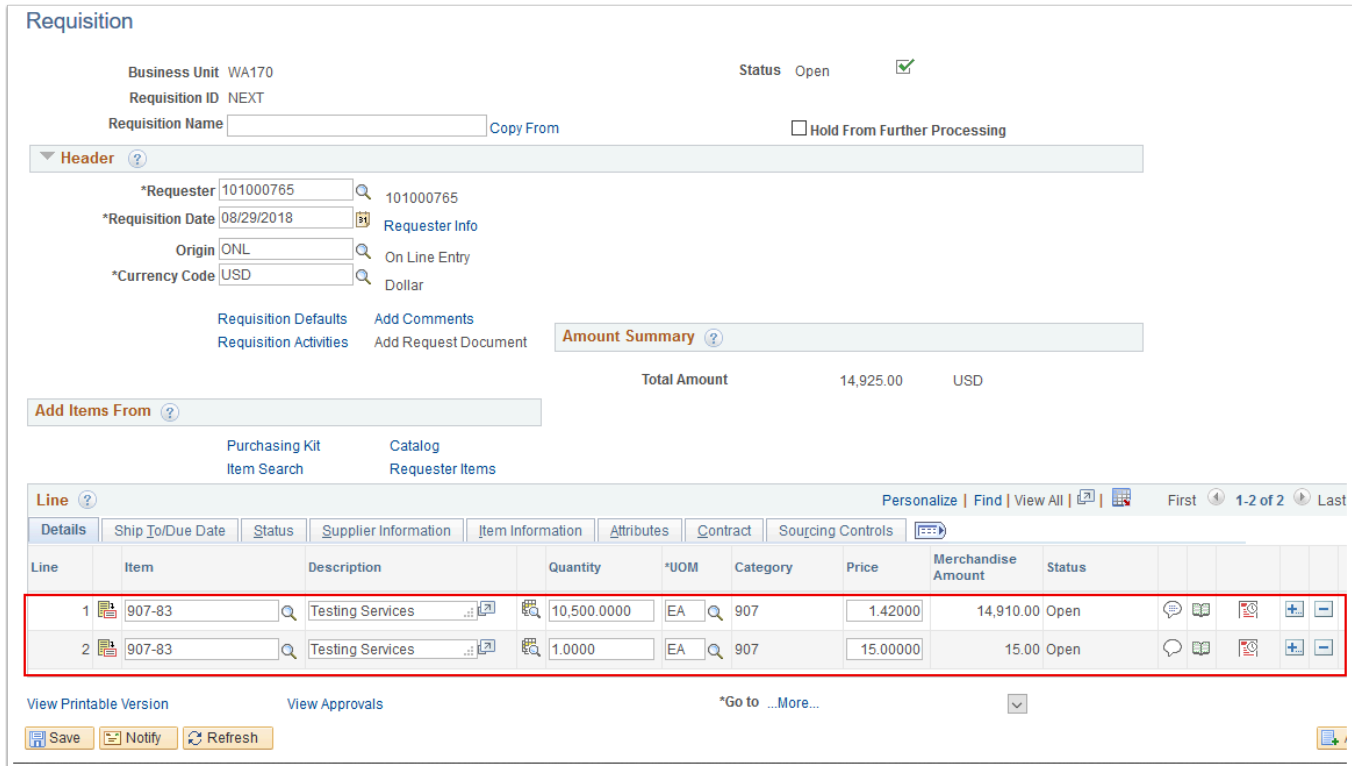
Search

Requisition					
Sel	Req ID	Requisition Name	Status	Origin	Requester
<input checked="" type="checkbox"/>	7 CASAS TE	7 CASAS TE	Complete	ONL	101000765

OK Cancel Refresh

 **Note:** If you want to preview a requisition before copying it you can select the hyperlinked Requisition ID.

- The requisition lines from the copy source are copied into your new requisition. The header information of your requisition is unaffected.



The screenshot displays the 'Requisition' interface. At the top, it shows 'Business Unit WA170', 'Requisition ID NEXT', and 'Status Open' with a checkmark. Below this is a 'Requisition Name' field with a 'Copy From' button and a 'Hold From Further Processing' checkbox. A 'Header' section contains fields for '*Requester' (101000765), '*Requisition Date' (08/29/2018), 'Origin' (ONL), and '*Currency Code' (USD). There are also links for 'Requisition Defaults', 'Add Comments', 'Requisition Activities', and 'Add Request Document'. An 'Amount Summary' box shows 'Total Amount 14,925.00 USD'. Below this is an 'Add Items From' section with 'Purchasing Kit' and 'Catalog' options. The main part of the interface is a table with columns: Line, Item, Description, Quantity, *UOM, Category, Price, Merchandise Amount, and Status. Two rows are visible, both for 'Testing Services' with item '907-83'. The first row has a quantity of 10,500.0000 and a price of 1.42000, with a merchandise amount of 14,910.00. The second row has a quantity of 1.0000 and a price of 15.00000, with a merchandise amount of 15.00. At the bottom, there are buttons for 'Save', 'Notify', and 'Refresh', along with a '*Go to ...More...' link.

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status
1	907-83	Testing Services	10,500.0000	EA	907	1.42000	14,910.00	Open
2	907-83	Testing Services	1.0000	EA	907	15.00000	15.00	Open

- Review the requisition line(s) carefully. If you copy a requisition line that has a value for Due Date (for example), it might be several years old. The line might have now-inappropriate comments. It is your responsibility to ensure the validity of the data.
- Add additional lines or remove lines as needed using the **Add multiple new rows [+]** and **Delete rows [-]** buttons at the end of each requisition line.
- When finished updating the new requisition, select **Save**. The updated **Requisition** page displays. Note that your requisition has been assigned a unique **Requisition ID** that can be used to identify it.

Maintain Requisitions
Requisition

Business Unit WA170 Status Open

Requisition ID 000003354

Requisition Name 000003354 Hold From Further Processing

▼ Header ?

*Requester 101000765 101000765
*Requisition Date 08/29/2018 Requester Info
Origin ONL On Line Entry
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities Add Request Document
Document Status

Amount Summary ?

Total Amount 14,925.00 USD

Add Items From ? Select Lines To Display ?

Purchasing Kit Catalog
Item Search Requester Items

Search for Lines
Line To Retrieve

Line ? Personalize | Find | View All | First 1-2 of 2 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	907-83	Testing Services	10,500.0000	EA	907	1.42000	14,910.00	Open				<input type="checkbox"/> <input type="checkbox"/>
2	907-83	Testing Services	1.0000	EA	907	15.00000	15.00	Open				<input type="checkbox"/> <input type="checkbox"/>

View Printable Version View Approvals Delete Requisition *Go to ...More...

Save Return to Search Notify Refresh Ad

9. When you are satisfied with the requisition, submit it for approval by selecting Submit for Approval.

Maintain Requisitions
Requisition

Business Unit WA170 Status Open

Requisition ID 000003354

Requisition Name 000003354 Hold From Further Processing

▼ Header ?

*Requester 101000765 101000765
*Requisition Date 08/29/2018 Requester Info
Origin ONL On Line Entry
*Currency Code USD Dollar

Requisition Defaults Add Comments
Requisition Activities Add Request Document
Document Status

Amount Summary ?

Total Amount 14,925.00 USD

Add Items From ? Select Lines To Display ?

Purchasing Kit Catalog
Item Search Requester Items

Search for Lines
Line To Retrieve

Line ? Personalize | Find | View All | First 1-2 of 2 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	907-83	Testing Services	10,500.0000	EA	907	1.42000	14,910.00	Open				<input type="checkbox"/> <input type="checkbox"/>
2	907-83	Testing Services	1.0000	EA	907	15.00000	15.00	Open				<input type="checkbox"/> <input type="checkbox"/>




View Printable Version View Approvals Delete Requisition *Go to ...More...

Save Return to Search Notify Refresh Ad






10. The Status of the Requisition will change from 'Open' to 'Pending' (approval).

Maintain Requisitions

Requisition

Business Unit WA170 Status **Pending** 
 Requisition ID 0000000184 Budget Status Not Chkd  
 Requisition Name 0000000184 Hold From Further Processing

Header ?

*Requester Training01  Training User - Mgr Spokane
 *Requisition Date 06/16/2015  **Requester Info**
 Origin ONL  On Line Entry
 *Currency Code USD  Dollar
 Accounting Date 06/16/2015 

Requisition Defaults Add Comments
 Requisition Activities Add Request Document
 Document Status Custom Fields



Amount Summary ?

Total Amount 2.00 USD



Add Items From ?






Purchasing Kit Catalog
 Item Search Requester Items

Select Lines To Display ?






Search for Lines
 Line  To  **Retrieve**

Line ?

Personalize | Find | View All |  |  | First 1 of 1 Last

Line	Item	Description	Quantity	*UOM	Category	Price	Merchandise Amount	Status				
1	010-11	Adhesives and	10.0000	EA	010	0.20000	2.00	Pending				 

View Printable Version View Approvals **Delete Requisition** *Go to **...More...**

 Save  Return to Search  Notify  Refresh  Add

11. Process complete.