COPYING A REQUISITION

When copying a requisition, choose Vendor Requisitions (A) to bring up the requisition to be copied:
Escape will automatically open it up, but you must close the ‘Form’ tab in order for the ‘Copy’ function to become available:
Now you can see that the “Copy” function can be chosen.

Then choose the correct Fiscal Year for the new requisition in the drop down:
This is what the NEW/COPIED requisition will look like:
At this point, be sure to EDIT/ADJUST the information entered, as you may not want the EXACT data to transfer into the new year. Things to look for:

Requisition tab (A):

It is important to enter a 1-2 word entry into the COMMENTS (!) field,…this will enable us to keep better records and search more effectively.

Items tab (B):

Open up the item description to ensure the information matches.

Correct fiscal year

Dollar amounts, etc.

A common entry for a blanket PO is:

“OPEN PURCHASE ORDER TO BE USED FOR OFFICE SUPPLIES FOR THE PERIOD OF JULY 1, 2015 – JUNE 30, 2016. NOT TO EXCEED $XXX.00”

Do not pay too much attention to the Message Before/Message After, as we can take care of that for you as we process the requisitions.

Accounts tab (C):

Do you want to change the account from the previous year? If so, please be sure to open up this tab and enter the new account information.

Attachments (D) and Notes (E) tabs:

Please feel free to leave us any pertinent information in the Notes tab and attach and any documents that are required/useful for the purchase.

Once you have entered all the necessary information, click on the Tasks (F) dropdown and choose Submit. You’re done!
Things to remember:

Items like toner, printer cartridges, etc. should be placed on IT requisitions.
Blanket POs are for whole dollar amounts, so when entering your item price, please make sure you are entering them as NON-TAXABLE.

Don’t forget to take note of the NEW requisition number for your records!
Alternative Search Methods

To view all of your blanket requisitions for the year, you can enter a few pieces of data into just a few fields.

See below. Select Reference Number (A) “B15”, and your Location Code (B).
You will end up with a list of blanket requisitions that you can work from, copy from, etc. It will look like this: