

## PO.020.120 – Creating a PO by Copying a Requisition

<b>Purpose</b>	To create a Purchase Order by copying from an existing requisition. This method provides users with an efficient way to create Purchase Orders and reduce the amount of time spent on redundant manual data entry.
<b>Description</b>	<p>Purchase Orders can be created in one of three ways:</p> <ul style="list-style-type: none"> <li>• By entering all fields manually</li> <li>• By sourcing a Requisition to a Purchase order</li> <li>• By copying an existing Requisition to Purchase Order.</li> </ul> <p>The advantage of sourcing or creating a PO from an existing requisition is that it reduces the amount of time spent on redundant data entry.</p> <p>A Purchase Order consists of the following sections:</p> <ul style="list-style-type: none"> <li>• Header: contains PO ID, accounting date, PO status, and budget status</li> <li>• Line(s): contains item description, unit of measure (UOM), amount, quantity, category code (NIGP)</li> <li>• Schedule: contains ShipTo and matching settings</li> <li>• Distribution: contains ChartFields, asset information, requisition detail</li> </ul>
<b>Security Role</b>	BOR_PO_MAINTAIN
<b>Dependencies/ Constraints</b>	The requisition is approved with a valid budget status.
<b>Additional Information</b>	If a user copies a requisition into a Purchase Order, the system will copy everything from that requisition, including Chartstring, and ship to information. If users change the information on the Purchase Order, it does not flow back to the requisition from which it copied.

## Procedure

Below are step by step instructions on how to create purchase order from an existing requisition.

Step	Action
1.	Click the <b>NavBar</b> icon.
2.	Click the <b>Menu</b> icon.
3.	Click the <b>Purchasing</b> link.
4.	Click the <b>Purchase Orders</b> link.
5.	Click the <b>Add/Update POs</b> link.
6.	On the Add A New Value Tab, click the <b>Add</b> button. The system navigates to the Maintain Purchase Order Page.
7.	Enter or search for a <b>Supplier ID</b> .
8.	Enter or search for a <b>Buyer</b> .
9.	Navigate to the <b>Copy From</b> drop down list at the top of the page.
10.	Select <b>Requisition</b> to access the Copy Purchase Order From Requisition page.
11.	Enter criteria to search for existing requisitions.
12.	Click the <b>Search</b> button.
13.	On the Sourcing tab, click the Select checkbox beside the requisition lines to copy into a Purchase Order.
14.	Click the <b>Copy To PO</b> button. The system navigates back to the Maintain Purchase Order page. Requisition lines selected in previous step should populate into the PO lines section.
15.	Review the selected PO lines for accuracy.
16.	To view additional line information including ShipTo, click the PO Line/Schedule icon. Also, to view ChartField, Asset, and Requisition Detail Information for the PO Line, click the Distributions/ChartField icon from the Schedules page.
17.	Once the PO lines are verified, click the <b>Save</b> button.
18.	Navigate to the header and verify the system assigned a Purchase Order ID.