Quick Reference

Copying an Existing Requisition

Responsibility: ANY end user responsibility beginning with “ECU Purchasing”

1. (N) iProcurement Homepage.
2. Click on the Copy icon on the requisition you want.
3. If the requisition you want to copy isn’t displayed on the iProcurement homepage, click the Full List button in the My Requisitions section to display all your requisitions.
4. Select the Requisition you want to copy and click the Copy to Cart button.

! IMPORTANT!

You can copy any existing requisition to cart, regardless of the status of the original requisition.

You can use the Search button to find a requisition raised by someone else and copy that to make your own requisition if you want to. To find other people’s requisitions see Finding Requisitions [PO-034].

5. Review the items that are now in your shopping cart. You can delete any line that you don’t want on this requisition, and change the quantity on the lines you do want.
6. If you want to add more lines to this new requisition click the Shop tab to return to the iProcurement homepage and follow the instructions for Entering a Non-Catalogue Request [PO-012] from step 2.
   If you add more lines, you’ll need to click the View Cart and Checkout button when you are ready to continue.
7. Click the Checkout button to progress to the ‘Checkout: Requisition Information’ screen.
8. The Requisition Description defaults the value from the first requisition line Item Description. Change it to be more meaningful.

! IMPORTANT!

When you copy someone else’s requisition the Requester, Deliver-To Location, and Charge Account details are all as per the original requisition. You must change the Requester Name to be your own to use your own defaults.

You will always be listed as the Preparer as it is your account that created the requisition.

9. Change the Requester Name to your own (format: Surname, First Name). This will change the Deliver-To Location and Charge Account to your system defaults.

! IMPORTANT!

If you need to change the default expense account, or split the expense across multiple charge accounts, please see Changing / Splitting Charge Accounts [PO-041].

If you need to change the deliver-to location, please see Changing the Delivery Address [PO-044].

10. Click the Next button to progress to the ‘Checkout: Review Approver List’ screen.
11. Confirm that the Approver Name is correct. If it isn’t see Changing the First Approver [PO-043].
12. If you need to add another approver, see Adding Another Approver [PO-042].

! IMPORTANT!

Pelham, Stephen is the top of the purchasing approval hierarchy. If he is listed as your approver, then there is a problem – no-one between you and the top of the tree can approve for the dollar amount and the flexfield(s) you have quoted on your requisition. If this is the case, save your requisition by clicking the Save button and investigate. See Retrieving a Shopping Cart [PO-034] when you are ready to complete your requisition.

13. If you need to add an attachment to the approver, please see Adding an Attachment to the Approver [PO-045].
14. Click the Next button to progress to the ‘Checkout: Review and Submit Requisition’ screen.
15. Check over the details of the requisition to make sure you are 100% happy with them. To see charge account details, click the Show Details link.
16. If you are not completely satisfied with the requisition, click the Back button to make other checkout changes.
17. If you are completely happy with the requisition, click the Submit button.
18. Take note of the Requisition Number in case you need to query it with the Approver, or the Systems team.