Copy a Requisition

This document describes how to copy a Requisition containing Non-Catalog items or a Check Request.

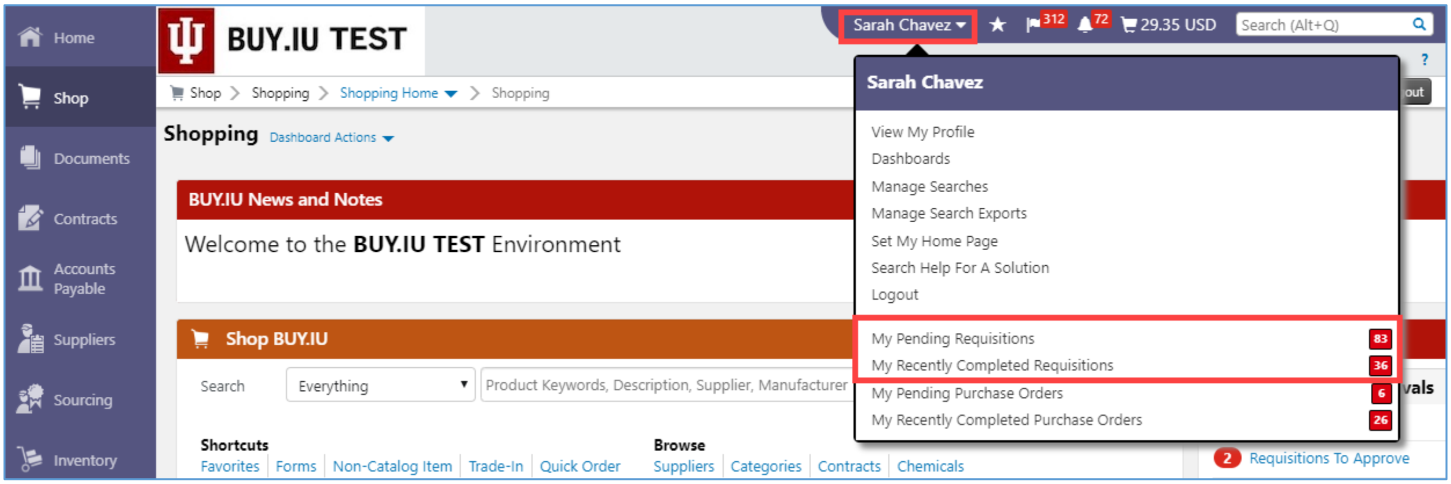
You can copy Catalog orders, but are unable to update quantities or add additional items.
Catalog prices change regularly. We encourage you to establish a new order instead of copying a previous order.

Table of Contents

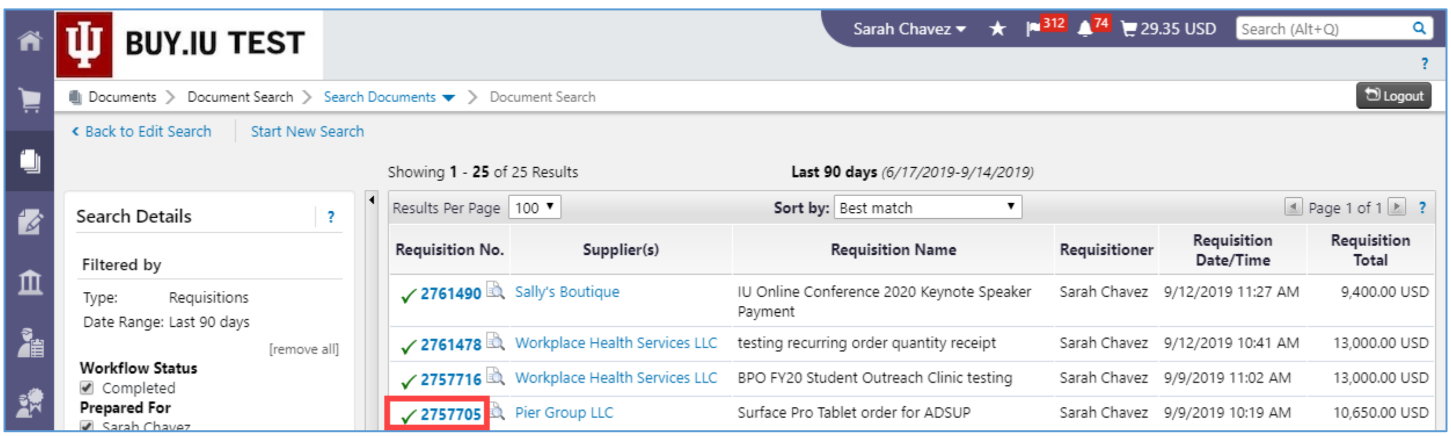
Non-Catalog Order

Locate the Requisition you wish to copy.

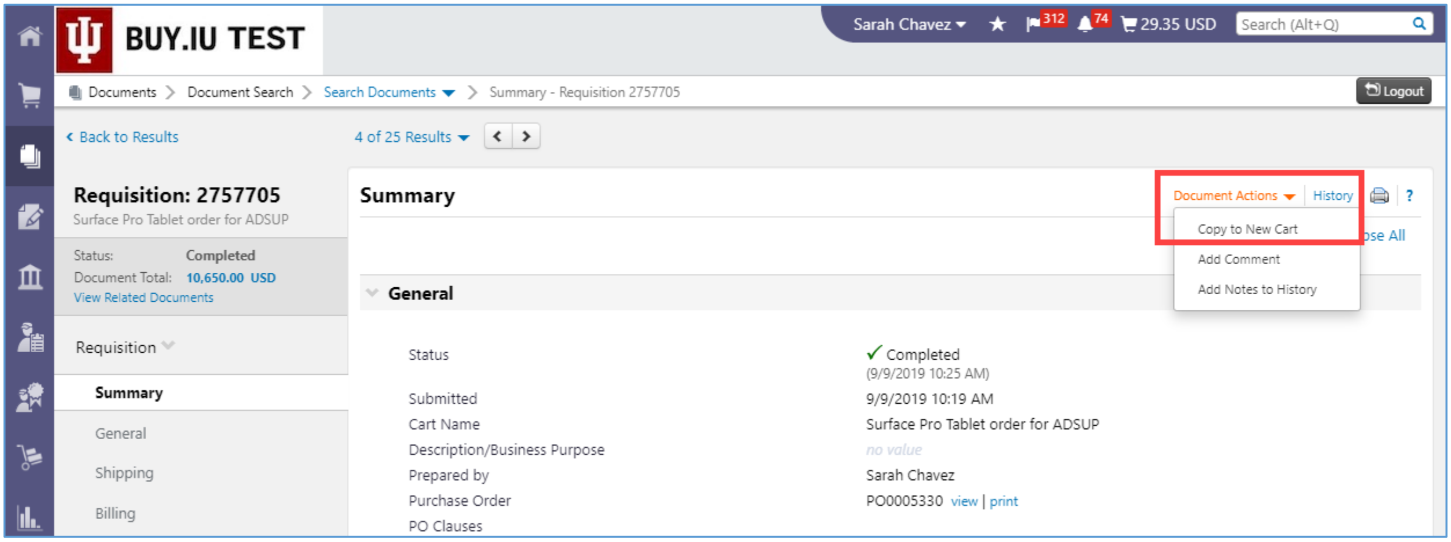
Click your **name** in the upper right-hand corner and select **My Completed Requisitions** to see a listing of Requisitions you've placed which have completed routing. The **My Pending Requisitions** section contains Requisitions still enroute. You can also [use the Document search]() to find the Requisition you're looking for.



Click the **document number** to open the Requisition.



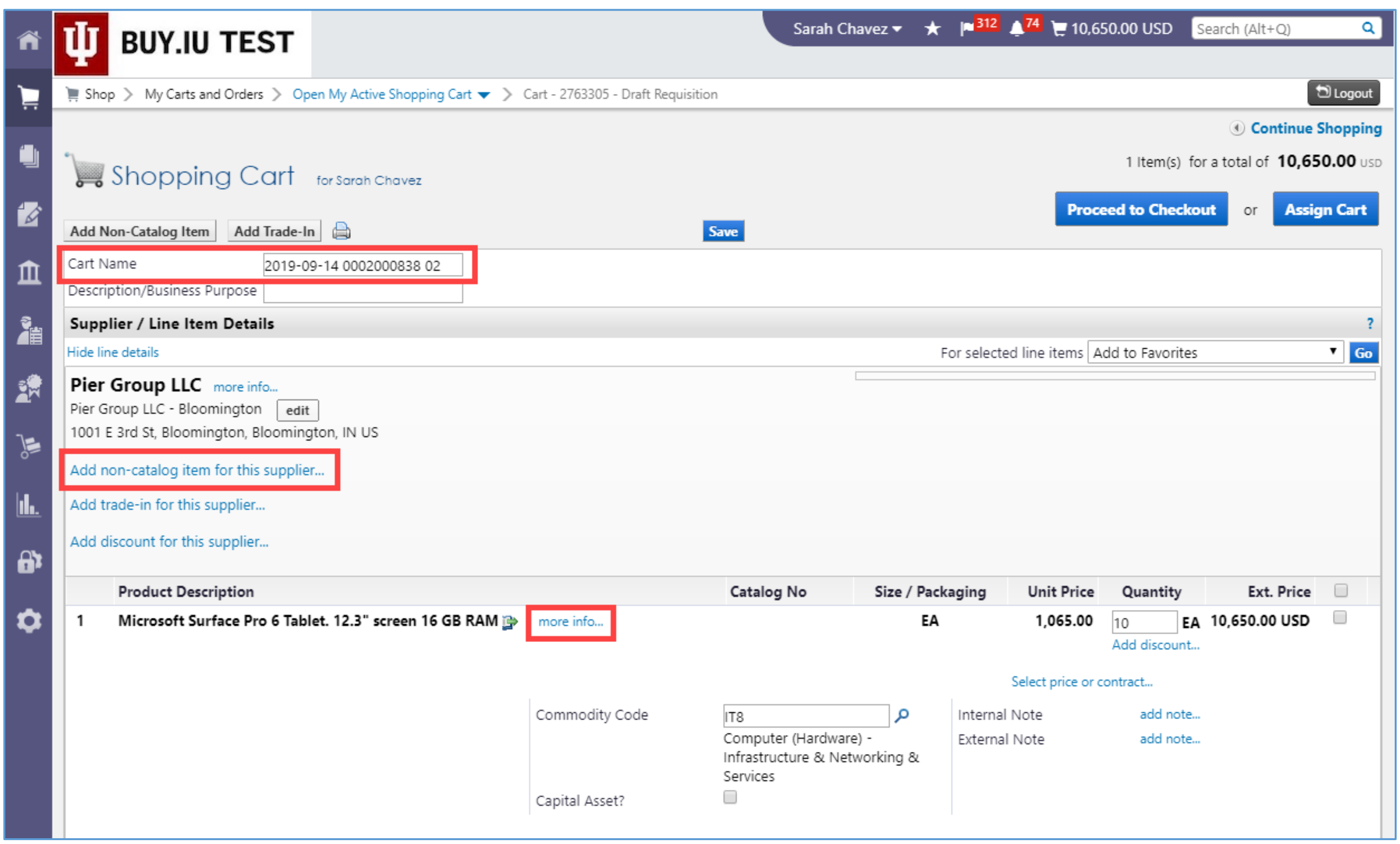
Select **Copy to New Cart** from the **Document Actions** menu in the upper right-hand corner.



BUY.IU creates a new Cart and Requisition using the previous order's information. You may want to make the following changes:

- Update the **Cart Name** so it describes the new order.
- Add additional line items by clicking **Add non-catalog item for this supplier…** under the supplier name.
- Edit line items by **clicking more info…** next to a line item.

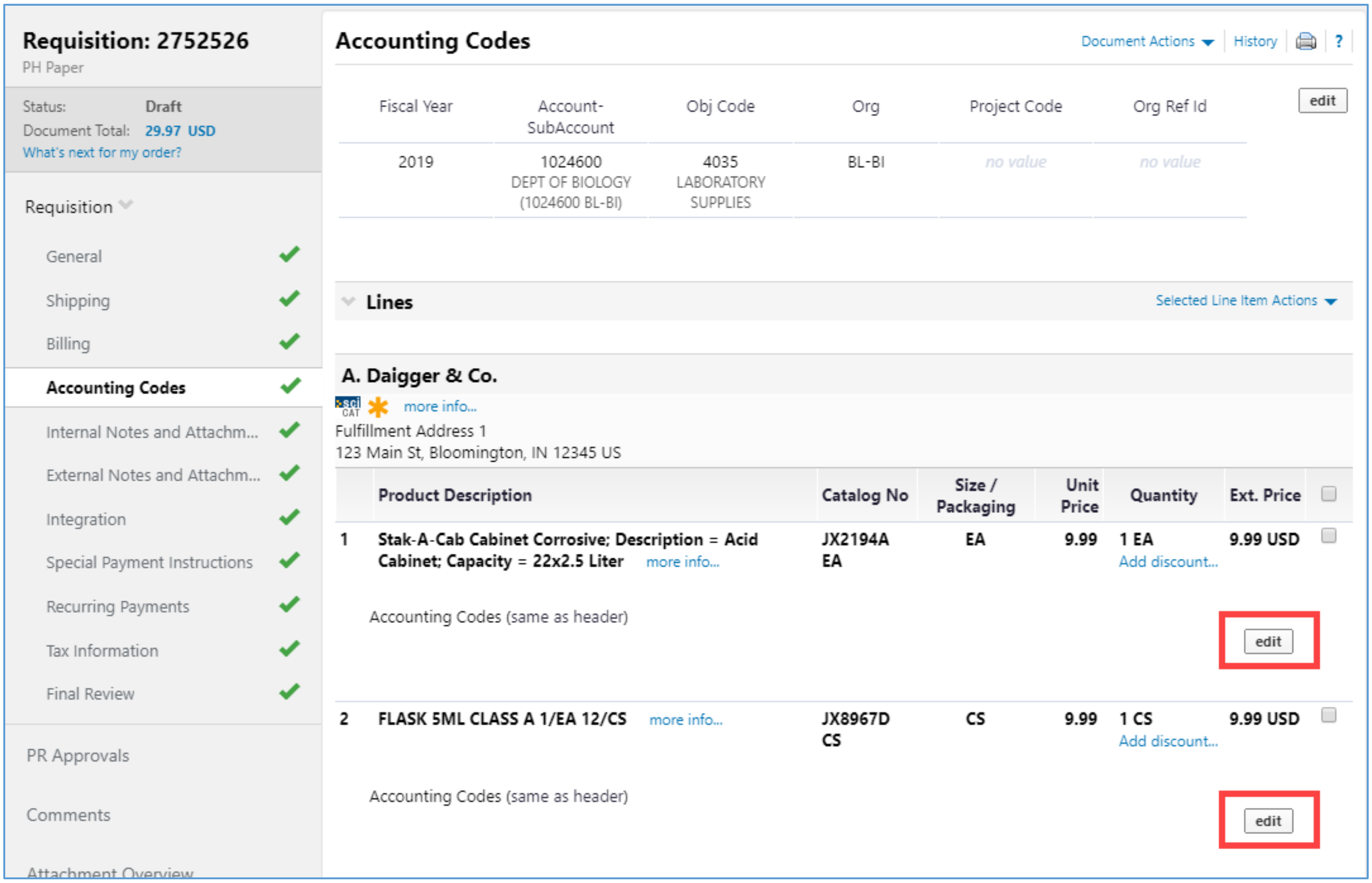
If you make changes, click **Save** so you don't lose your work.



Click **Proceed to Checkout** to move to the Requisition section of the document.

BUY.IU allows you to submit the order immediately.
We strongly encourage you to review at least the sections highlighted below prior to submission.

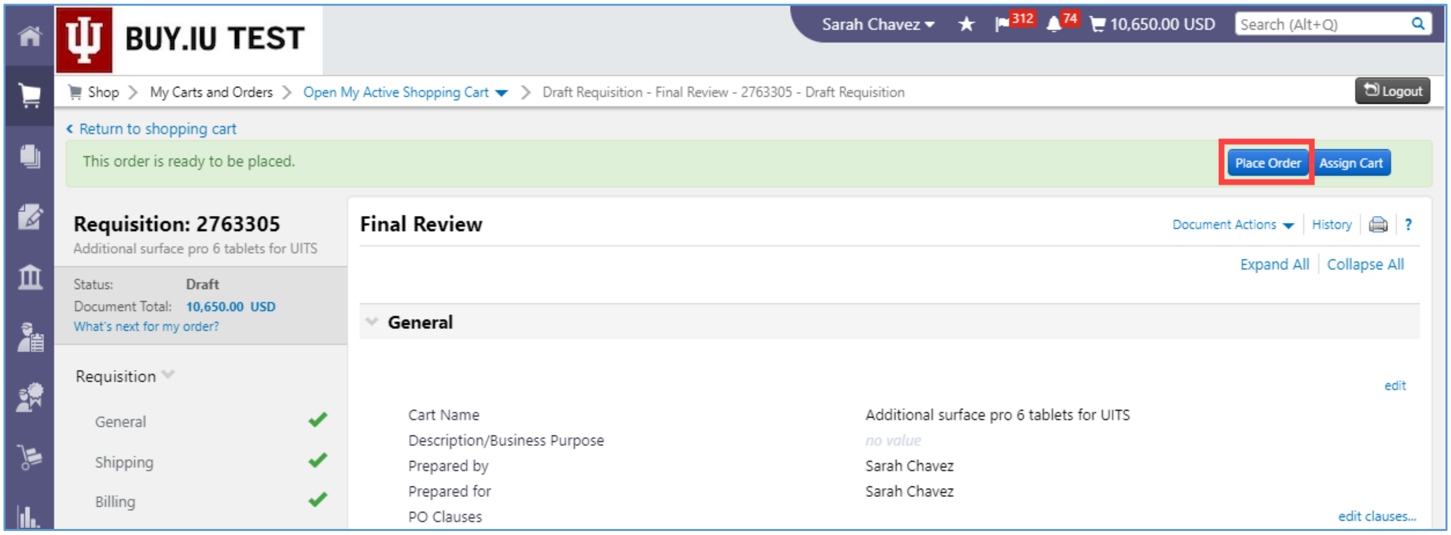
Click **edit** in the upper right hand corner to make changes at the header level, click **edit** at the line item level to make changes to that line item only.



- **Shipping** – ensure the shipping address is correct.
- **Accounting Codes** – review accounts, object codes, and org ref IDs. Information entered here will be used to pay supplier invoices.
- **External Notes and Attachments** – external notes and attachments are distributed to the supplier with the Purchase Order.
- **Special Payment Instructions** – information entered in **Check Stub Text** field(s) appears on supplier invoice payments.

Though not required by the system, we strongly encourage you to review the order using the **Final Review** section. Once submitted, you are unable to edit the document.

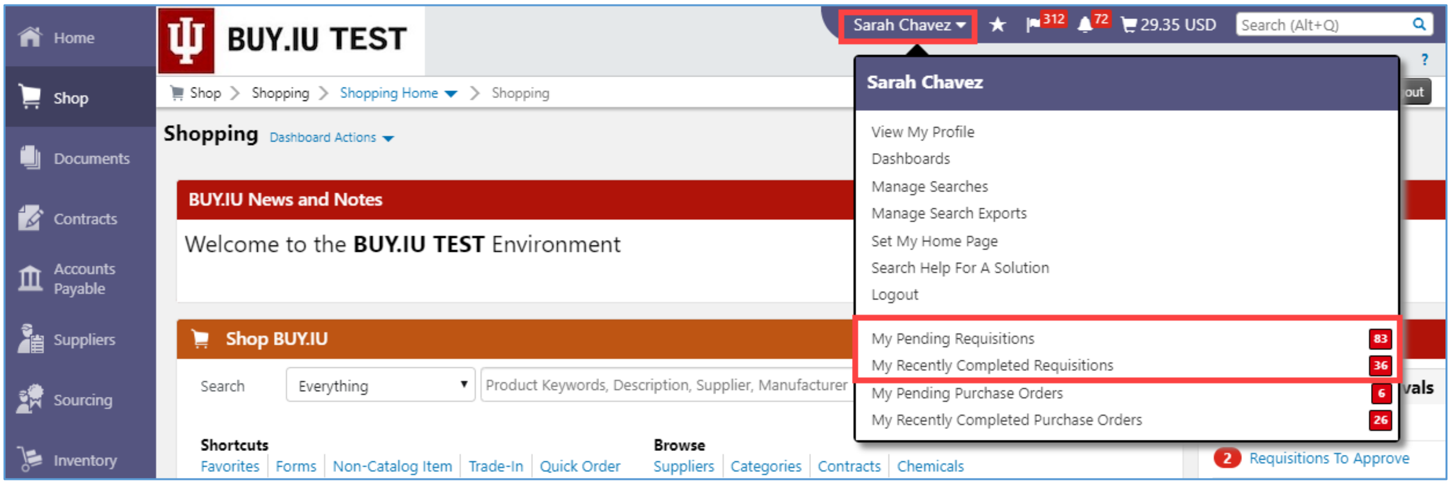
Click **Place Order** to submit the order into the workflow.



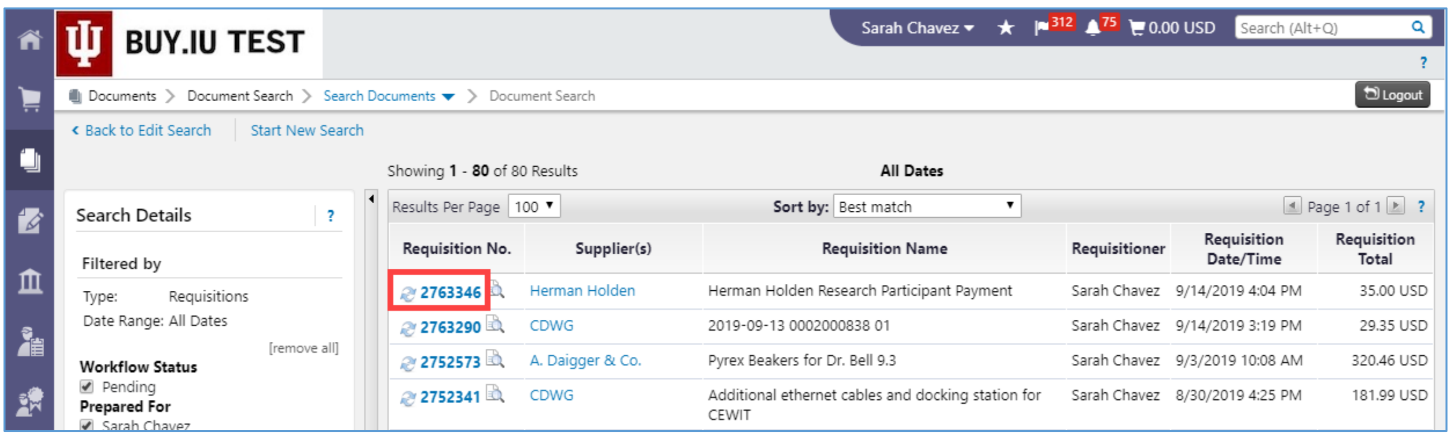
Check Request

Locate the Requisition you wish to copy. Remember, a Check Request is a form attached to a Requisition.

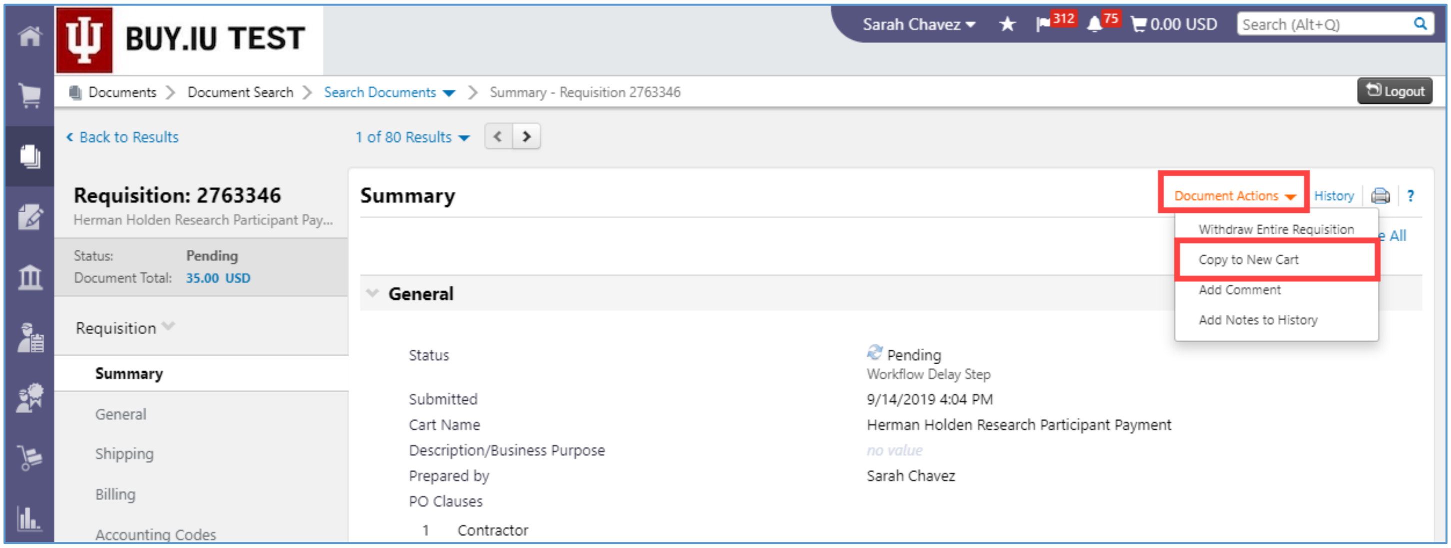
Click your **name** in the upper right-hand corner and select **My Completed Requisitions** to see a listing of Requisitions you've placed which have completed routing. The **My Pending Requisitions** section contains Requisitions still enroute. You can also use the Document search to find the Requisition you're looking for.



Click the **document number** to open the Requisition.

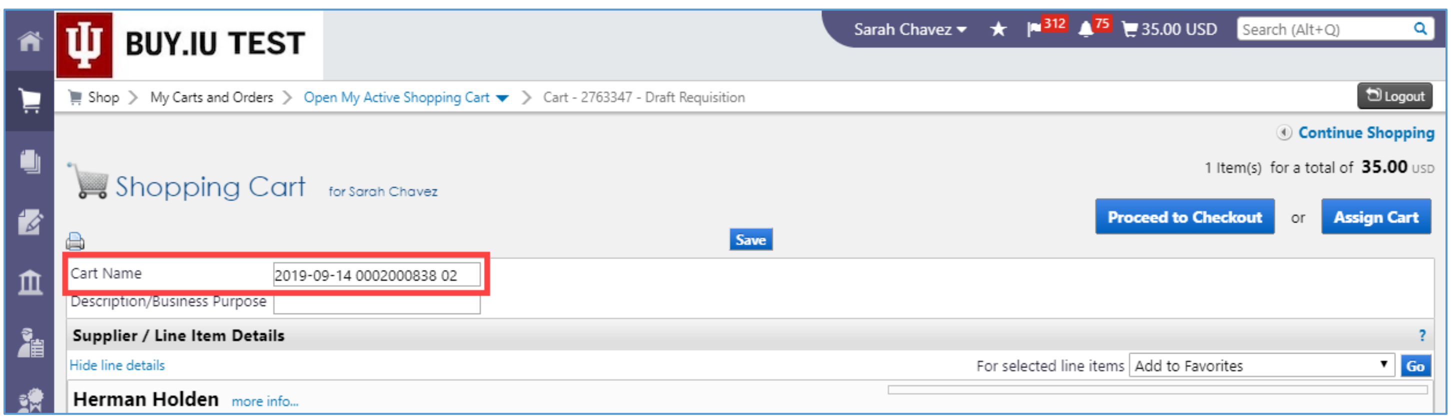


Select **Copy to New Cart** from the **Document Actions** menu in the upper right-hand corner.



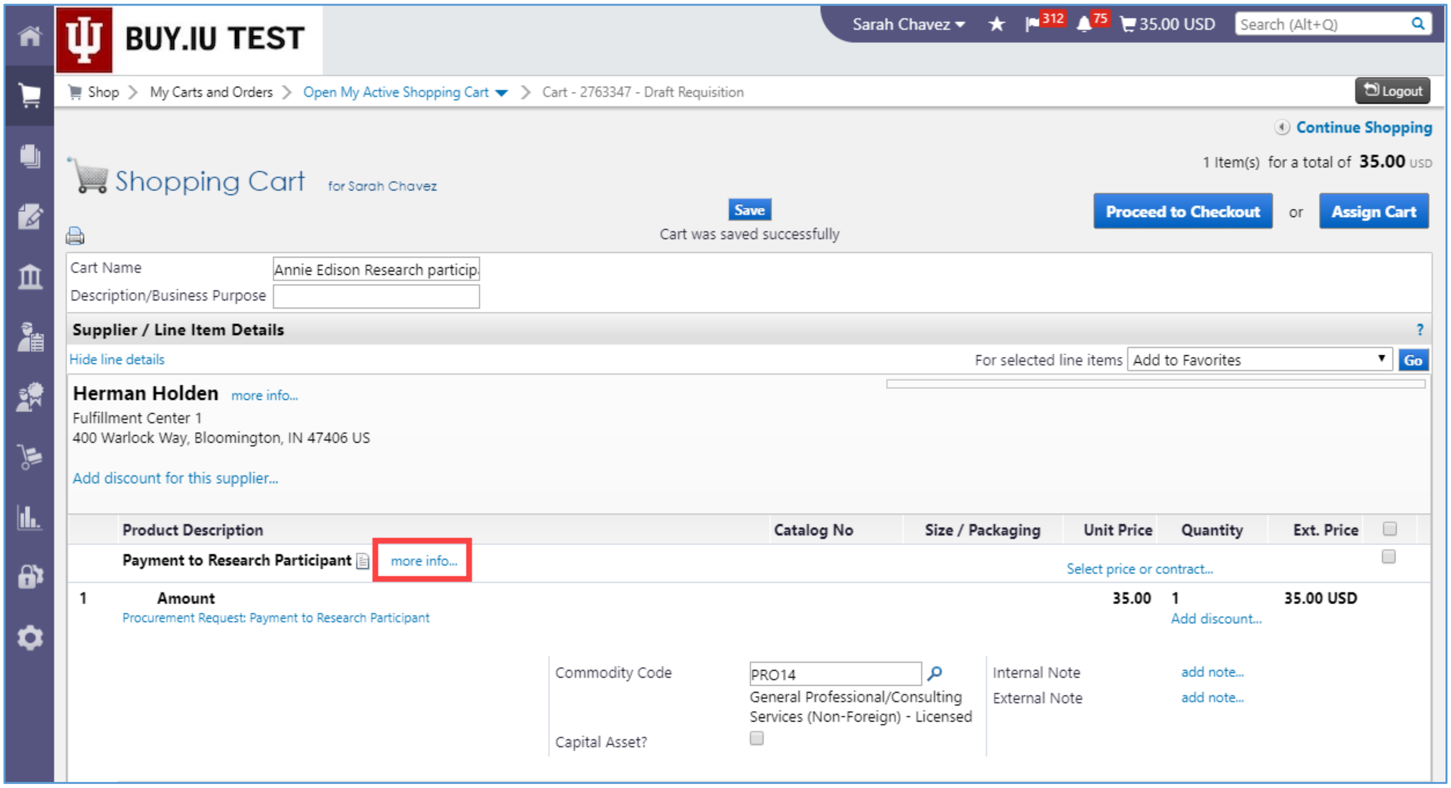
Click **Save** to save your changes.

BUY.IU creates a new Cart and Requisition using the previous order's information. Update the **Cart Name** to reflect the new Check Request.



Copying the Cart and Requisition also copies the Check Request form. You must update the Check Request to reflect the correct supplier, form fields, and substantiation documentation associated with your payment situation.

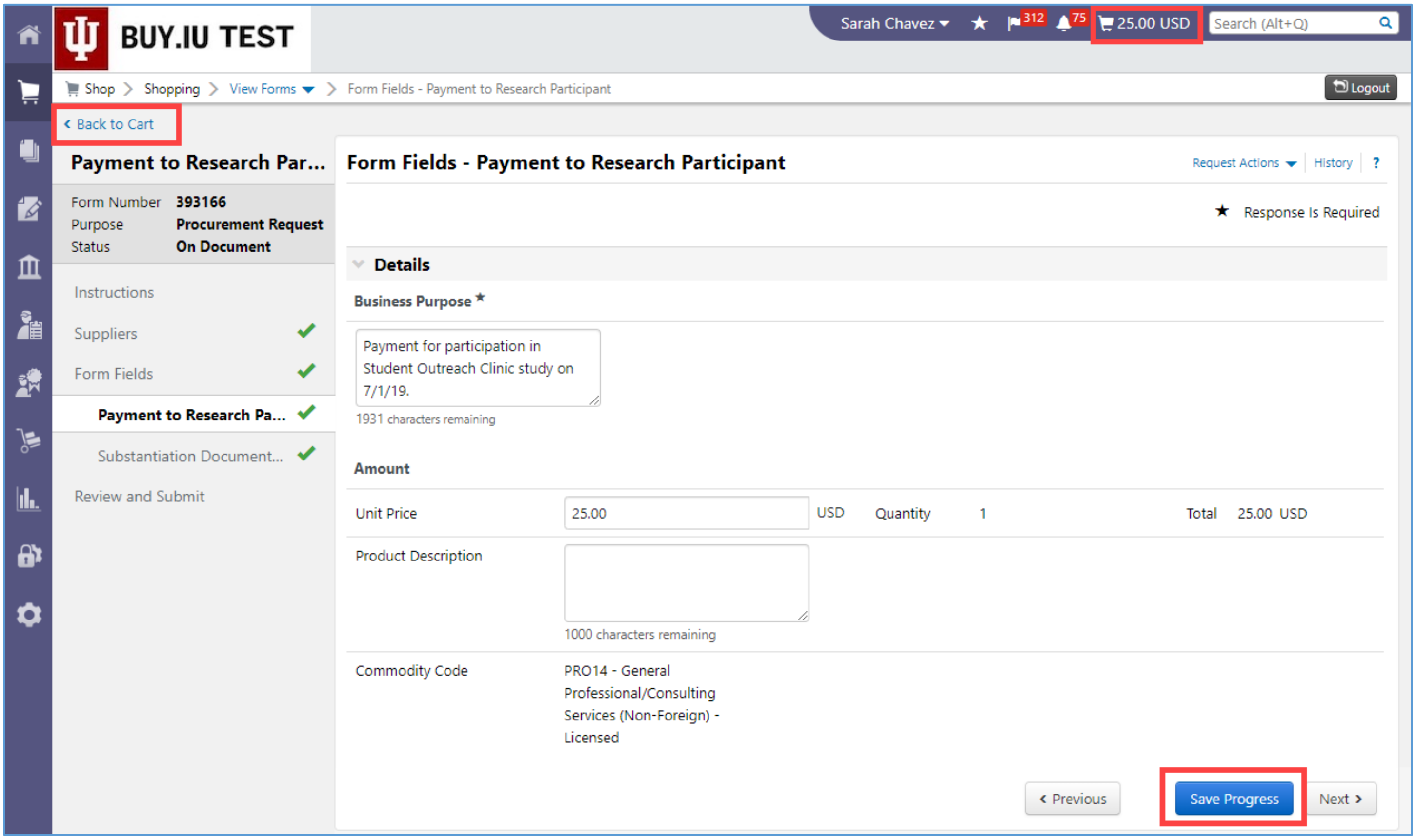
Click **more info…** next to the Check Request form name to edit the Check Request.



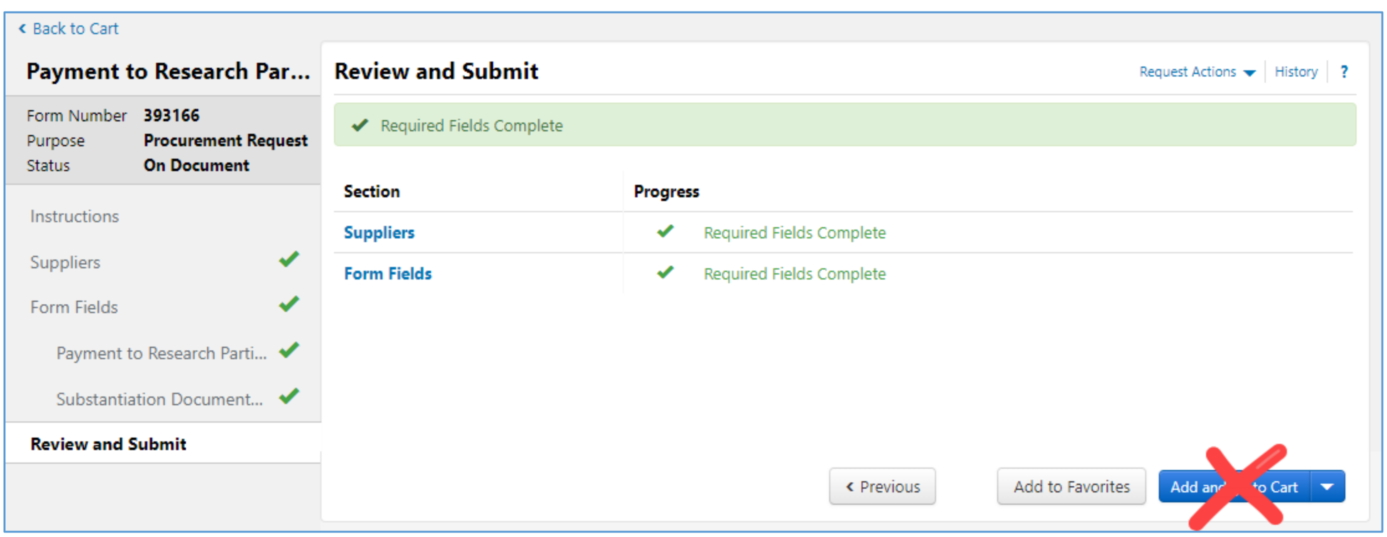
Update the fields in the appropriate Check Request section:

- **Supplier** – the individual or entity who will receive payment.
- **Form Specific Fields** – varies by Check Request form; contains the **Business Purpose** and **Unit Price** fields.
- **Substantiation Documentation** – remove documentation from copied Check Request and upload appropriate documentation.

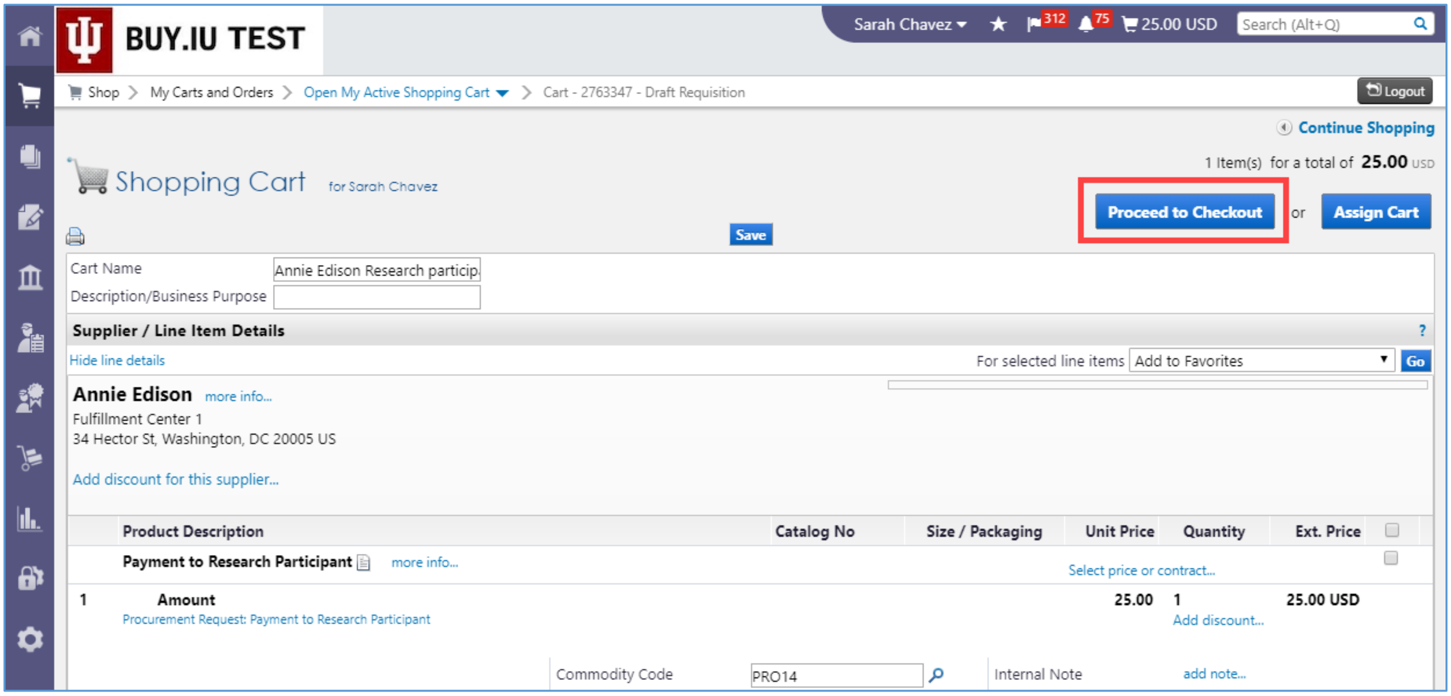
Click **Save Progress** to save your changes. Select **Back to Cart** to return to the shopping cart, or navigate back using the **cart icon** in the upper right-hand corner.



Do not click **Add and go to Cart** in the **Review and Submit** section of the form. This adds a duplicate Check Request form to your cart and results in duplicate payments to the supplier.



In the Cart, click **Proceed to Checkout** to move to the Requisition section of the document.



BUY.IU allows you to submit the order immediately.
<u>We strongly encourage you to review at least the sections highlighted below prior to submission.</u>

Click **edit** in the upper right hand corner to make changes at the header level, click **edit** at the line item level to make changes to that line item only.

- **Accounting Codes** – review accounts, object codes, and org ref IDs.
- **Special Payment Instructions** – information entered in **Check Stub Text** field(s) is communicated to the payee.

Though not required by the system, we strongly encourage you to review the order using the **Final Review** section. Once submitted, you are unable to edit the document.

Click **Place Order** to submit the order into workflow for review.