

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.

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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.

The screenshot shows the BUY.IU TEST dashboard. In the top right corner, the user name 'Sarah Chavez' is highlighted with a red box. A dropdown menu is open, showing options like 'View My Profile', 'Dashboards', 'Manage Searches', etc. Two options are highlighted with red boxes: 'My Pending Requisitions' (with a red badge showing '83') and 'My Recently Completed Requisitions' (with a red badge showing '36').

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

The screenshot shows the Document Search results page. The search is filtered for 'Requisitions' within the 'Last 90 days' period. A table displays the search results:

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
2761490	Sally's Boutique	IU Online Conference 2020 Keynote Speaker Payment	Sarah Chavez	9/12/2019 11:27 AM	9,400.00 USD
2761478	Workplace Health Services LLC	testing recurring order quantity receipt	Sarah Chavez	9/12/2019 10:41 AM	13,000.00 USD
2757716	Workplace Health Services LLC	BPO FY20 Student Outreach Clinic testing	Sarah Chavez	9/9/2019 11:02 AM	13,000.00 USD
2757705	Pier Group LLC	Surface Pro Tablet order for ADSUP	Sarah Chavez	9/9/2019 10:19 AM	10,650.00 USD

The requisition number 2757705 is highlighted with a red box.

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

BUY.IU TEST Sarah Chavez 312 74 29.35 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Summary - Requisition 2757705

4 of 25 Results

Requisition: 2757705
Surface Pro Tablet order for ADSUP

Status: **Completed**
Document Total: **10,650.00 USD**
[View Related Documents](#)

Document Actions History

- Copy to New Cart
- Add Comment
- Add Notes to History

Summary

General

Status: **Completed** (9/9/2019 10:25 AM)

Submitted: 9/9/2019 10:19 AM

Cart Name: Surface Pro Tablet order for ADSUP

Description/Business Purpose: no value

Prepared by: Sarah Chavez

Purchase Order: PO0005330 [view](#) | [print](#)

PO Clauses

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.

BUY.IU TEST Sarah Chavez 312 74 10,650.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2763305 - Draft Requisition

Continue Shopping

1 Item(s) for a total of **10,650.00 USD**

[Proceed to Checkout](#) or [Assign Cart](#)

Shopping Cart for Sarah Chavez

[Add Non-Catalog Item](#) [Add Trade-In](#) [Save](#)

Cart Name: 2019-09-14 0002000838 02

Description/Business Purpose

Supplier / Line Item Details

Hide line details For selected line items [Add to Favorites](#) [Go](#)

Pier Group LLC [more info...](#)

Pier Group LLC - Bloomington [edit](#)

1001 E 3rd St, Bloomington, Bloomington, IN US

[Add non-catalog item for this supplier...](#)

[Add trade-in for this supplier...](#)

[Add discount for this supplier...](#)

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Microsoft Surface Pro 6 Tablet. 12.3" screen 16 GB RAM more info...		EA	1,065.00	10 EA	10,650.00 USD

Select price or contract...

Commodity Code: IT8 Computer (Hardware) - Infrastructure & Networking & Services

Internal Note: [add note...](#)

External Note: [add note...](#)

Capital Asset?:

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.

Requisition: 2752526
PH Paper

Status: **Draft**
Document Total: **29.97 USD**
[What's next for my order?](#)

Requisition ▾

- General ✓
- Shipping ✓
- Billing ✓

Accounting Codes ✓

- Internal Notes and Attachm... ✓
- External Notes and Attachm... ✓
- Integration ✓
- Special Payment Instructions ✓
- Recurring Payments ✓
- Tax Information ✓
- Final Review ✓

PR Approvals

Comments

[Attachment Overview](#)

Accounting Codes Document Actions ▾ | History | ?

Fiscal Year	Account-SubAccount	Obj Code	Org	Project Code	Org Ref Id	edit
2019	1024600 DEPT OF BIOLOGY (1024600 BL-BI)	4035 LABORATORY SUPPLIES	BL-BI	no value	no value	

▾ **Lines** Selected Line Item Actions ▾

A. Daigger & Co.
asci CAT * [more info...](#)
 Fulfillment Address 1
 123 Main St, Bloomington, IN 12345 US

	Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price	
1	Stak-A-Cab Cabinet Corrosive; Description = Acid Cabinet; Capacity = 22x2.5 Liter more info...	JX2194A EA	EA	9.99	1 EA	9.99 USD	Add discount... <input type="checkbox"/>
Accounting Codes (same as header)							edit
2	FLASK 5ML CLASS A 1/EA 12/CS more info...	JX8967D CS	CS	9.99	1 CS	9.99 USD	Add discount... <input type="checkbox"/>
Accounting Codes (same as header)							edit

- **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.

BUY.IU TEST Sarah Chavez 312 74 10,650.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Draft Requisition - Final Review - 2763305 - Draft Requisition Logout

[Return to shopping cart](#)

This order is ready to be placed. **Place Order** Assign Cart

Requisition: 2763305
Additional surface pro 6 tablets for UITS

Status: **Draft**
Document Total: **10,650.00 USD**
What's next for my order?

Requisition

- General ✓
- Shipping ✓
- Billing ✓

Final Review Document Actions History ?
Expand All Collapse All

General

Cart Name	Additional surface pro 6 tablets for UITS	edit
Description/Business Purpose	no value	
Prepared by	Sarah Chavez	
Prepared for	Sarah Chavez	
PO Clauses		edit clauses...

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.

BUY.IU TEST Sarah Chavez 312 72 29.35 USD Search (Alt+Q)

Sarah Chavez

- View My Profile
- Dashboards
- Manage Searches
- Manage Search Exports
- Set My Home Page
- Search Help For A Solution
- Logout
- My Pending Requisitions** 83
- My Recently Completed Requisitions** 36
- My Pending Purchase Orders 6
- My Recently Completed Purchase Orders 26

2 Requisitions To Approve

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

BUY.IU TEST Sarah Chavez 312 75 0.00 USD Search (Alt+Q)

Documents > Document Search > Search Documents > Document Search

Showing 1 - 80 of 80 Results All Dates

Results Per Page: 100 Sort by: Best match Page 1 of 1

Requisition No.	Supplier(s)	Requisition Name	Requisitioner	Requisition Date/Time	Requisition Total
2763346	Herman Holden	Herman Holden Research Participant Payment	Sarah Chavez	9/14/2019 4:04 PM	35.00 USD
2763290	CDWG	2019-09-13 0002000838 01	Sarah Chavez	9/14/2019 3:19 PM	29.35 USD
2752573	A. Daigger & Co.	Pyrex Beakers for Dr. Bell 9.3	Sarah Chavez	9/3/2019 10:08 AM	320.46 USD
2752341	CDWG	Additional ethernet cables and docking station for CEWIT	Sarah Chavez	8/30/2019 4:25 PM	181.99 USD

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

The screenshot shows the 'Summary - Requisition 2763346' page. The requisition is for 'Herman Holden Research Participant Pay...' with a status of 'Pending' and a total of '35.00 USD'. The 'Document Actions' menu is open, showing options: 'Withdraw Entire Requisition', 'Copy to New Cart' (highlighted with a red box), 'Add Comment', and 'Add Notes to History'. The 'General' section of the requisition includes: Status (Pending, Workflow Delay Step), Submitted (9/14/2019 4:04 PM), Cart Name (Herman Holden Research Participant Payment), Description/Business Purpose (no value), Prepared by (Sarah Chavez), and PO Clauses (1 Contractor).

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.

The screenshot shows the 'Shopping Cart' page for Sarah Chavez. The cart contains 1 item(s) for a total of 35.00 USD. The 'Cart Name' field is highlighted with a red box and contains the value '2019-09-14 0002000838 02'. Below the cart name is the 'Supplier / Line Item Details' section for 'Herman Holden'. Buttons for 'Save', 'Proceed to Checkout', and 'Assign Cart' are visible.

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.

BUY.IU TEST

Sarah Chavez | 312 | 75 | 35.00 USD | Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2763347 - Draft Requisition

Shopping Cart for Sarah Chavez | 1 Item(s) for a total of 35.00 USD

Save | Proceed to Checkout | Assign Cart

Cart was saved successfully

Cart Name: Annie Edison Research particip

Description/Business Purpose: [Empty]

Supplier / Line Item Details

Hide line details | For selected line items: Add to Favorites | Go

Herman Holden | more info...
Fulfillment Center 1
400 Warlock Way, Bloomington, IN 47406 US
Add discount for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
Payment to Research Participant more info...			35.00	1	35.00 USD
1 Amount Procurement Request: Payment to Research Participant					
Commodity Code	PRO14 General Professional/Consulting Services (Non-Foreign) - Licensed	Internal Note	add note...		
Capital Asset?	<input type="checkbox"/>	External Note	add note...		

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.

BUY.IU TEST Sarah Chavez 312 75 25.00 USD Search (ALT+Q) Logout

Shop > Shopping > View Forms > Form Fields - Payment to Research Participant

[Back to Cart](#)

Payment to Research Par... **Form Fields - Payment to Research Participant** Request Actions History ?

Form Number **393166**
 Purpose **Procurement Request**
 Status **On Document**

Instructions
 Suppliers
 Form Fields

Payment to Research Pa...
 Substantiation Document...
 Review and Submit

Details

Business Purpose *

Payment for participation in Student Outreach Clinic study on 7/1/19.
 1931 characters remaining

Amount

Unit Price	25.00	USD	Quantity	1	Total	25.00 USD
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Product Description

1000 characters remaining

Commodity Code PRO14 - General Professional/Consulting Services (Non-Foreign) - Licensed

[Previous](#) [Save Progress](#) [Next](#)

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.

[Back to Cart](#)

Payment to Research Par... **Review and Submit** Request Actions History ?

Form Number **393166**
 Purpose **Procurement Request**
 Status **On Document**

Instructions
 Suppliers
 Form Fields
 Payment to Research Parti...
 Substantiation Document...

Review and Submit

Required Fields Complete

Section	Progress
Suppliers	<input checked="" type="checkbox"/> Required Fields Complete
Form Fields	<input checked="" type="checkbox"/> Required Fields Complete

[Previous](#) [Add to Favorites](#) [Add and go to Cart](#)

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

BUY.IU TEST Sarah Chavez 312 75 25.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Cart - 2763347 - Draft Requisition Logout

Continue Shopping 1 Item(s) for a total of 25.00 USD

Proceed to Checkout or Assign Cart

Save

Cart Name: Annie Edison Research partici
Description/Business Purpose:

Supplier / Line Item Details

Hide line details For selected line items: Add to Favorites Go

Annie Edison more info...
Fulfillment Center 1
34 Hector St, Washington, DC 20005 US
Add discount for this supplier...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Amount Procurement Request: Payment to Research Participant			25.00	1	25.00 USD

Commodity Code: PRO14 Internal Note: add note...

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.

- **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.

BUY.IU TEST Sarah Chavez 312 74 10,650.00 USD Search (Alt+Q)

Shop > My Carts and Orders > Open My Active Shopping Cart > Draft Requisition - Final Review - 2763305 - Draft Requisition Logout

Return to shopping cart

This order is ready to be placed. Place Order Assign Cart

Requisition: 2763305
Additional surface pro 6 tablets for UITs

Status: Draft
Document Total: 10,650.00 USD
What's next for my order?

Requisition

General	✓
Shipping	✓
Billing	✓

Final Review

Document Actions History ?
Expand All Collapse All

General

Cart Name	Additional surface pro 6 tablets for UITs	edit
Description/Business Purpose	no value	
Prepared by	Sarah Chavez	
Prepared for	Sarah Chavez	
PO Clauses		edit clauses...