

QUICK REFERENCE GUIDE

Copying an ePro Requisition

July 9, 2012

Copy an Existing Requisition

A previously created requisition can be used as the basis to create a new requisition through the copy process.

1. **Navigate** to eProcurement, Manage Requisitions.

Manage Requisitions

Search Requisitions

To locate requisitions, edit the criteria below and click the Search button.

Business Unit: Origin: Requisition Name:

Requisition ID: Request Status: Budget Status:

Date From: Date To: Agency Reference:

Requester: Entered By: PO ID:

2. Locate the requisition you wish to copy.
 - a. Enter the Business Unit (BU).
 - b. Enter the Requisition ID.
 - c. Click **Search**.

Requisitions

To view the lifespan and line items for a requisition, click the Expand triangle icon:
To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.

Req ID	Requisition	Agency Ref	BU	Origin	Date	Status	Budget	Total	
10000000044	Offset Printing Equip M...	192719	P7801	978	04/05/2012	Approved	Valid	70,000.00 USD	<input type="button" value="Go"/>

3. Click the Select Action dropdown menu.
4. Select **Copy Requisition**.
5. Click **Go**.

Edit a Newly Created Requisition

Once the existing requisition is copied, the new requisition will open and can be updated as necessary. Keep in mind the values on the requisition (including Chartfield, quantity, ship to location, etc.) should be double checked before the requisition is saved.

Update ChartField Values

1. Locate the line for which Chartfield values should be updated.

The screenshot shows the 'Requisition Lines' table with the following data:

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Offset Printing Equipment Main	PRESSTEK INC	1.0000	EACH	70,000.00000	70,000.00

Summary information below the table:

- Total Amount: 70,000.00 USD
- Pre-Encumbrance Balance: 70,000.00 USD

Buttons at the bottom: Add to Favorites, Add to Template(s), Modify Line / Shipping / Accounting, Delete.

2. Click on the **Expand Section** icon  at the far left of the line.

The screenshot shows the expanded details for line 1. The 'Accounting Lines' section is visible with the following data:

Fund	Fin DeptID	AppropID	Account	Sub Acct	SW Cost	Agcy Cost 1	Agcy Cost 2	PC Bus Unit	Project
4400	P7835034	P78502E	415001						

The 'Chartfields2' tab is highlighted in red.

3. Click the **Chartfields2** tab.
4. Change any of the funding string values needing to be updated.

The screenshot shows the 'Accounting Lines' table with the 'Budget Information' tab selected. The data is as follows:

Fund	Fin DeptID	AppropID	Account	Sub Acct	SW Cost	Agcy Cost 1	Agcy Cost 2	PC Bus Unit	Project
1000	P0732212	B041G0	415001						

The 'Budget Information' tab is highlighted in red.

5. Click the **budget information** tab.

Accounting Lines							Customize Find View All First 1 of 1 Last	
Budget Status	Budget Date	Pre-Encumbrance Balance	Pre-Encumbrance Balance		Pre-Encumbered Base Balance			
Warning	04/05/2011	70,000.00	70000.00	USD	70,000.00	USD		

6. Change the date to the new fiscal year if necessary.
7. Update additional lines as necessary.
8. Make any other needed changes to the requisition.

Once all changes are complete, the requisition must be submitted. Scroll to the bottom of the **Review and Submit** page of the requisition to complete the requisition.

Check Budget
 Pre-Check Budget

Budget Checking Status: **Not Checked**

Save & submit
 Save & preview approvals

Cancel Changes
[Find more items](#)

9. Click **Save and Submit**.

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[Create New Requisition](#)

Submit
Edit Requisition
Apply Approval Changes
Check Budget
Pre-Check Budget

10. Click **Check Budget**.