9.2 Purchase Order from a Requisition

Purpose: To use the Copy from Requisition process to create a new PO using ctcLink.

Audience: Purchasing staff.

ctcLink Purchasing enables you to create a new purchase order by copying an existing contract, requisition, or PO. Copying enables you to save redundant data entry time.

⚠ You must have at least one of these local college managed security roles:

- ZD Accounts Payable Inquiry
- ZD Purchasing Inquiry
- ZZ Purchase Order Entry
- ZZ Purchasing Approval

    You must also set these User Preference Definitions:

- User Preferences: Purchase Order Entry
- Buyer Setup

    If you need assistance with the above security roles or User Preference Definitions, please contact your local college supervisor or IT Admin to request role access.
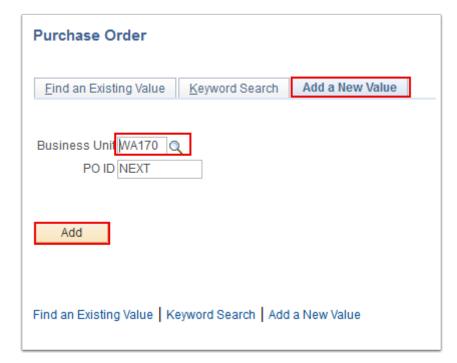
Purchase Order from a Requisition

Navigation: NavBar > Navigator > Purchasing > Purchase Orders > Add/Update POs

1. The **Purchase Order** search page displays. You can elect to **Find an Existing Value** or **Add a New Value**.
2. If you already have a PO you want to update, enter the **Business Unit** and **PO ID**. Make sure the PO has not already been approved. Select **Search** and select your appropriate row. This should take you to the **Maintain Purchase Order** page. You can skip through the next section and go directly to instructions pertaining to the **Maintain Purchase Order** page.

3. In this QRG, we will use the **Add a New Value** tab.
4. Enter **Business Unit**. The **PO ID** field will be auto-populated with NEXT for the new PO are you creating.
5. Select the **Add** button.

> ℹ️ The value in the **PO Date** field is the current system date by default. You can override the purchase order date. This appears on the purchase order and is the date used for price calculation if the price date is defined as the purchase order date.

6. The **Maintain Purchase Order** page displays. Use it to enter or change PO information online.
7. Enter the desired information into the **Supplier ID** field.
8. Select the **Copy From** field and choose **Requisition**. This will automatically take you to the **Copy Purchase Order from Requisition** page.

> ℹ️ When you copy from a requisition, you are **sourcing** the requisition onto the purchase order. The **Copy From** field on the previous page enables you to turn a requisition into a purchase order without going through sourcing. If you want to partially source, split source, or consolidate requisitions, use the **Requisition Selection** component. If a blanket purchase order is specified on the requisition line, it cannot be sourced to the purchase order here. In addition, the procurement card information will be copied to the new purchase order if all the requisitions selected are using the same procurement card information. If the information between the requisitions is not the same, the procurement card will be blank or the buyer's procurement card will become the default value. If a supplier card currently exists on the purchase order, it will not be overridden by the requisitions procurement card information.

Maintain Purchase Order
Purchase Order

Business Unit WA170
PO ID NEXT
Copy From [▼]

PO Status Initial ☑
Budget Status Not Chk'd
☐ Hold From Further Processing

▼ Header ❓

*PO Date 08/22/2018 📅   Supplier Search
*Supplier SODEXO-003 🔍 Supplier Details
*Supplier ID V000047161 🔍 Sodexo America LLC
*Buyer [   ] 🔍
PO Reference [   ]

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print ▼   [Dispatch]

Header Details   Activity Summary
PO Defaults   Add Comments
PO Activities   Add ShipTo Comments
        ▼ Actions

Amount Summary ❓
Merchandise   0.00
Freight/Tax/Misc.   0.00   [Calculate]
Total Amount   0.00 USD

Add Items From ❓
Catalog   Item Search
Purchasing Kit

Lines ❓   Personalize | Find | View All | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

| Details | Ship To/Due Date | Statuses | Item Information | Attributes | RFQ | Contract | Receiving | 📋 |

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	📄 [ ] 🔍	[ ] 🔲 🔍	[ ]	[ ] 🔍	[ ] 🔍	0	0.000	Approved	💬	📅	➕	➖

View Printable Version   [Close Short All Lines]   *Go to [... More ...   ▼]

[💾 Save] [📧 Notify] [🔄 Refresh]   [➕ Add] [📄 Update/Displ]

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9. The **Copy Purchase Order from Requisition** page displays. Enter the **Supplier ID** or the **Requisition ID** in the **Requisition Selection Criteria** section.
10. Select the **Search** button. This populates the **Select Requisition Lines** section.
11. Select the relevant **Requisition Line(s)** from the search results.
12. Select the **Copy To PO** button.

Maintain Purchase Order
Copy Purchase Order from Requisition

Return to Main Page
▼ Requisition Selection Criteria

Business Unit WA170
Supplier ID [   ] 🔍
Category [   ] 🔍
Requisition ID 0000001793 🔍
Requisition Name [   ] 🔍
Contract ID [   ] 🔍
[Search]

Buyer [   ] 🔍
Origin [   ] 🔍
Max Rows 100
☑ Include Reqs With No Supplier
☑ Include Inventory Items
☐ Exclude Auto Source Item

Select Requisition Lines   Personalize | Find | View All | 🔲 | 📊   First ◀ 1 of 1 ▶ Last

| Sourcing | Requisitions | Contract Information | Item Substitution | 📋 |

Select	ePro Special Request Item	*Supplier	PO Qty	PO UOM	Item	Description	Req ID	Line	Procurement Card	Calc Price	Schedule Split
☑	📄	BRISTOWMEG-001 🔍	1.0000	HRS		Provide a lecture on "Arthriti	0000001793	1		N	

☑ Select All   ☐ Clear All
[Copy To PO]

[💾 Save] [📧 Notify] [🔄 Refresh]   [➕ Add] [📄 Update/Display]

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13. The **Purchase Order** page displays. Notice that the page displays the details of the items that you selected to copy. Also notice the fields that are auto-populated throughout the **Purchase Order** screen. Information that you would have otherwise had to enter manually.
14. Select **Save**.

15. The **Purchase Order** page redisplays. Notice that the system has automatically assigned the new **PO ID** if you were creating a new PO. Otherwise, it will update your existing PO.

Maintain Purchase Order

Purchase Order

Business Unit WA170
PO ID 0000003080
Copy From [_____▼]

PO Status Open
Budget Status Not Chk'd

☐ Hold From Further Processing

▼ Header ⑦

*PO Date 08/22/2018 📅   Supplier Search
*Supplier SODEXO-003 🔍   Supplier Details
*Supplier ID V000047161 🔍   Sodexo America LLC
*Buyer CTC_BRAMIREZ 🔍   Bill Ramirez
PO Reference [_____]

Doc Tol Status Valid

Receipt Status Not Recvd
*Dispatch Method Print ▼   [Dispatch]

Header Details   Activity Summary
PO Defaults   Edit Comments
PO Activities   Add ShipTo Comments
Requisitions
  ▼ Actions

Amount Summary ⑦

Merchandise   40.00
Freight/Tax/Misc.   3.52   [Calculate]
Total Amount   43.52   USD

Add Items From ⑦

Catalog   Item Search
Purchasing Kit

Lines ⑦

Personalize | Find | View All | 🔲 | 📊   First ◄ 1 of 1 ► Last

Details	Ship To/Due Date	Statuses	Item Information	Attributes	RFQ	Contract	Receiving	📝

Line	Item	Description	PO Qty	*UOM	Category	Price	Merchandise Amount	Status				
1	📇 [_____] 🔍	Provide a lecture on 📝	1.0000	HRS 🔍	924 🔍	40.00000	40.00	Approved	💬	🗓	➕	➖

View Printable Version   [Close Short All Lines]   *Go to [... More ... ▼]

[💾 Save] [📧 Notify] [🔄 Refresh]   [📥 Add] [📲 Update/Dis]

16. Process complete.