Job Aid:
How to Clone a Requisition

This Job Aid shows how to:

- Clone a Requisition in COMMBUYS

Of Special Note:

Requisitions are documents used to request goods and services. A requisition is the first document used to generate a Purchase Order (PO). Cloning will allow you to copy (or clone) a previously created requisition in order to create a new requisition, thus eliminating the need to re-enter much of the data. The new requisition will have a new requisition number and allow you to edit data in any way you need to in order to update the requisition information.

NOTE: Punchout orders cannot be cloned.

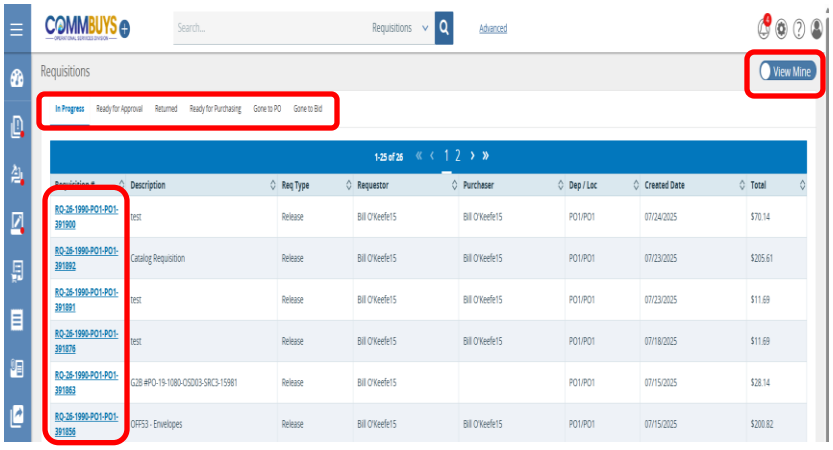
NOTE: Full details on creating a Statewide contract purchase can be found in the job *aid How to Make a Statewide Contract Purchase in COMMBUYS.*

There are two methods to search for and display an existing requisition from which to clone. One way is to click on the Requisitions icon located on the left side of the home page.

An alternate method is to search for the requisition using the Advanced Search functionality.

Both ways are described below in Step 1.

Screenshot



Directions

Step 1: Selecting a Requisition (First Method)

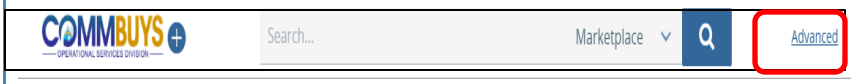
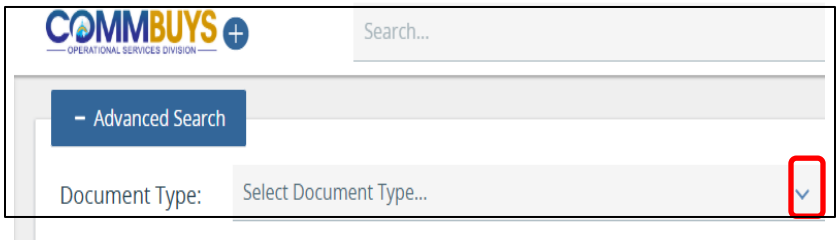
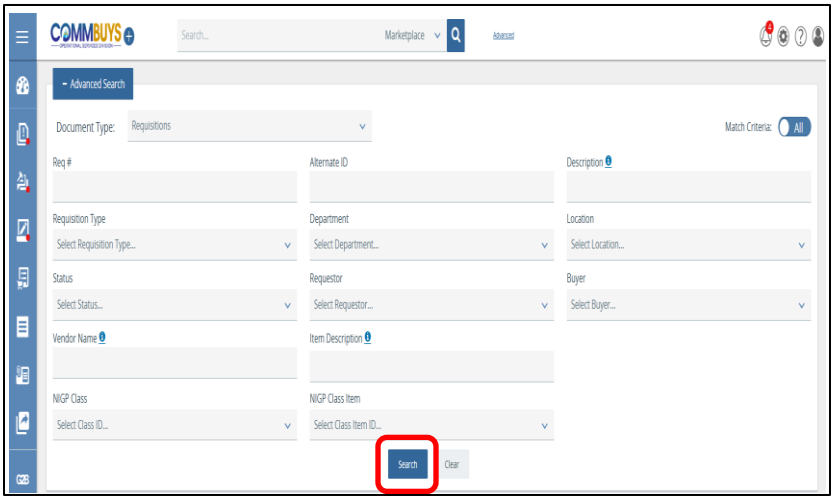
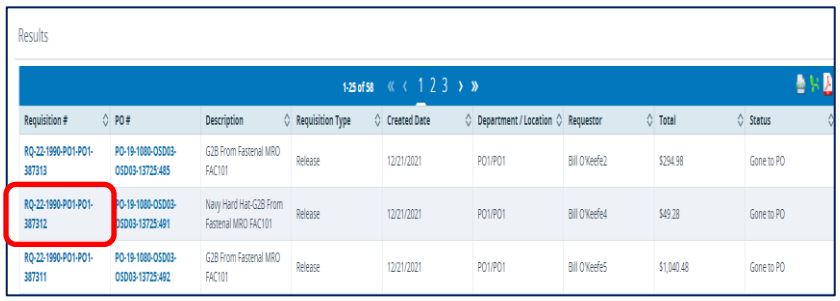
1. After logging in to COMMBUYS, click on the **Requisitions** icon on the left side bar of the COMMBUYS Home Page.

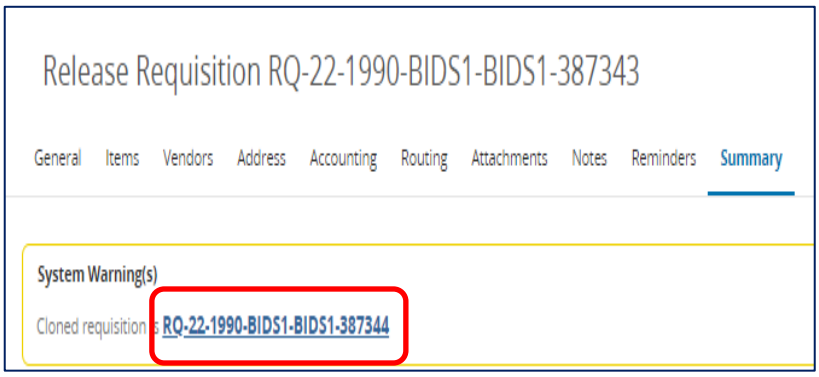
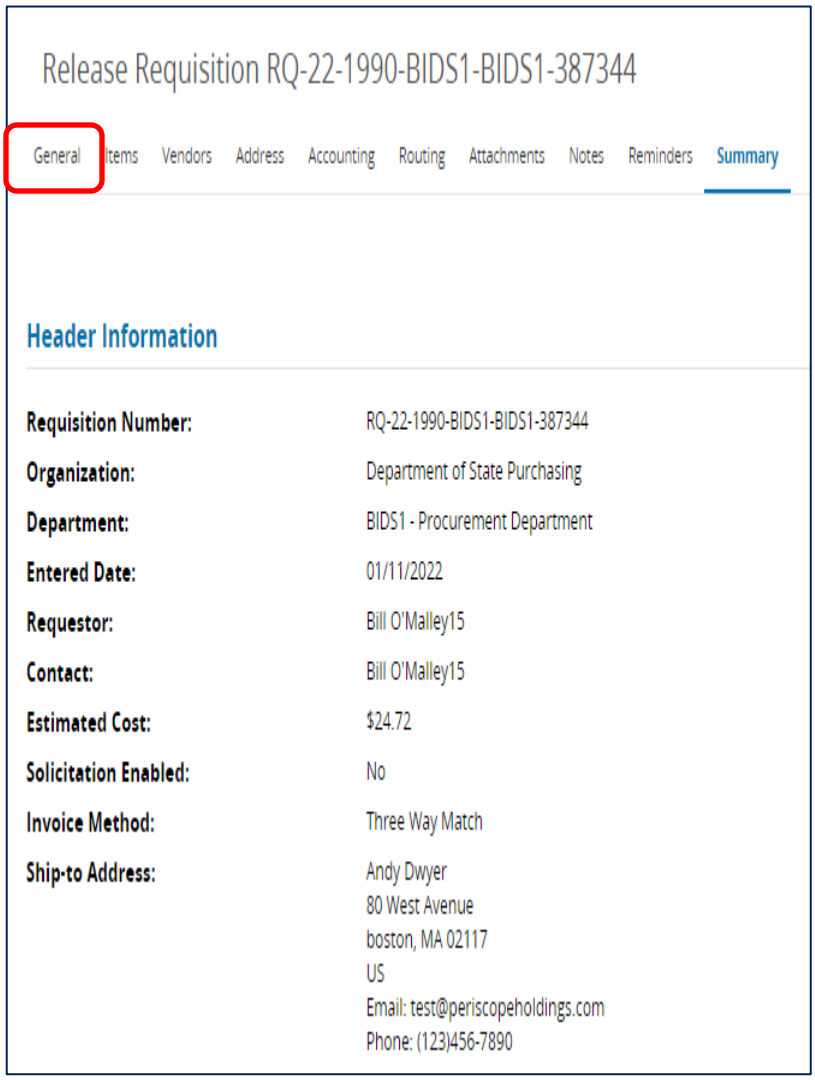
2. A list of requisitions displays. The tabs at the top may be selected in order to view requisitions in different statuses. Generally, you will choose the tab **Gone to PO.** You may also click on the **View Mine** button at the top right of the display to change the list and see a **View All** display.

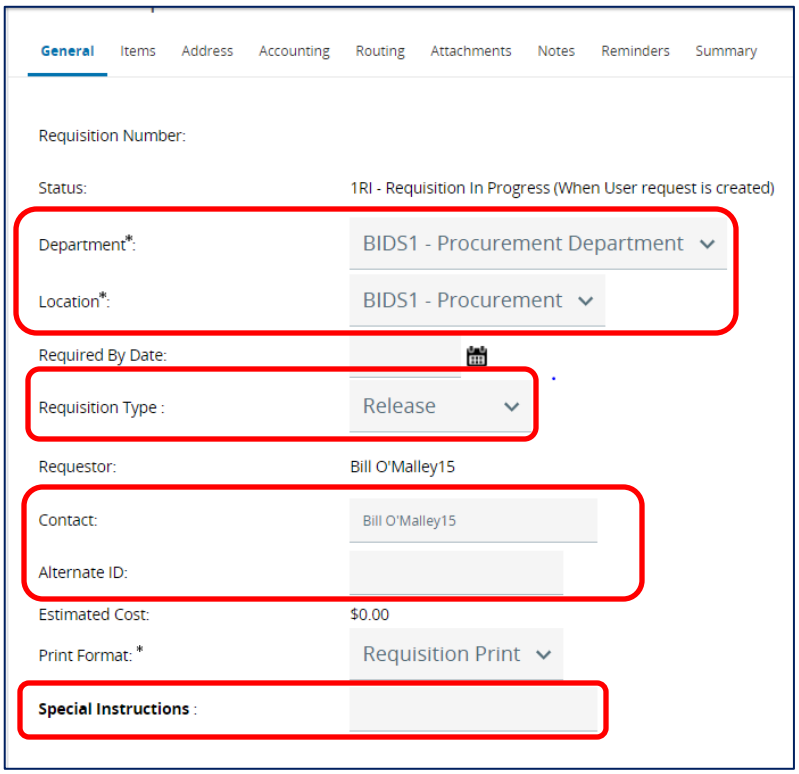
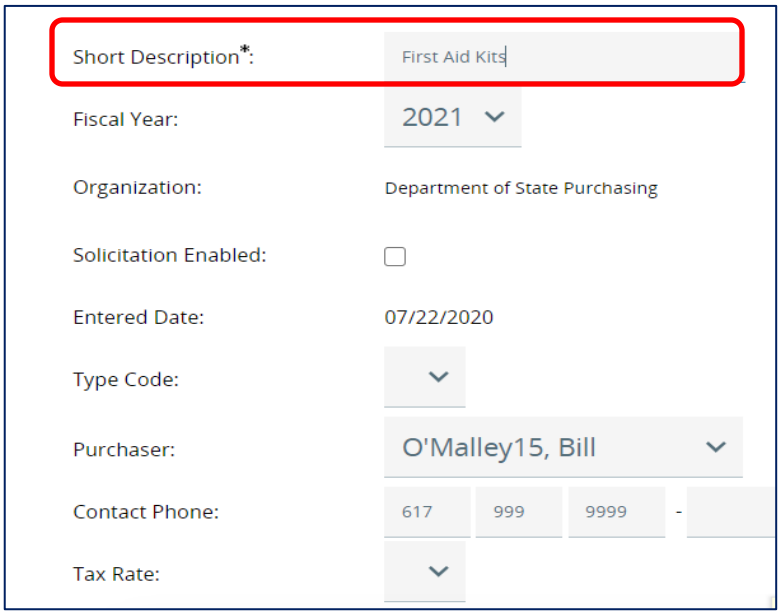
3. Choose a requisition to clone by clicking on the **blue hyperlink** in the **Requisition #** column.

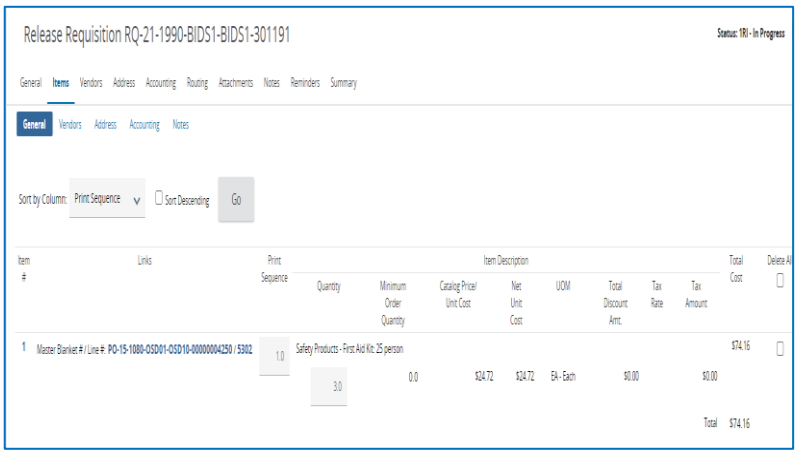
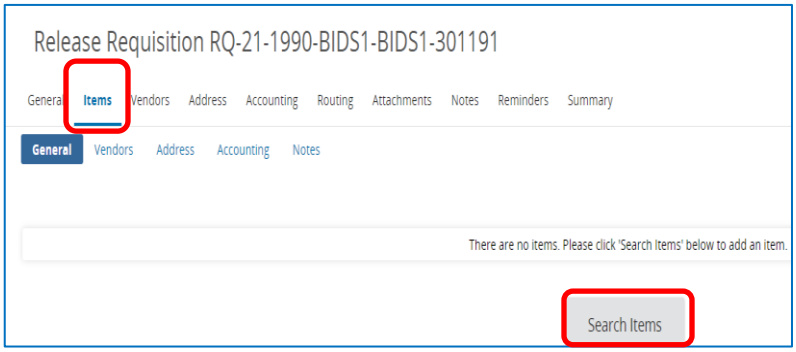
4. The Summary tab page of the requisition displays. Scroll to the bottom of the page and click on the **Clone Requisition** button.

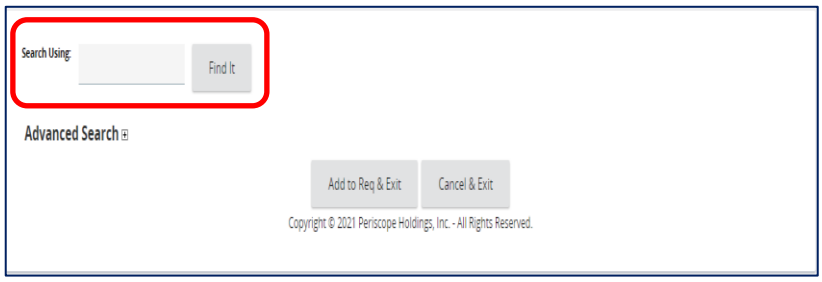
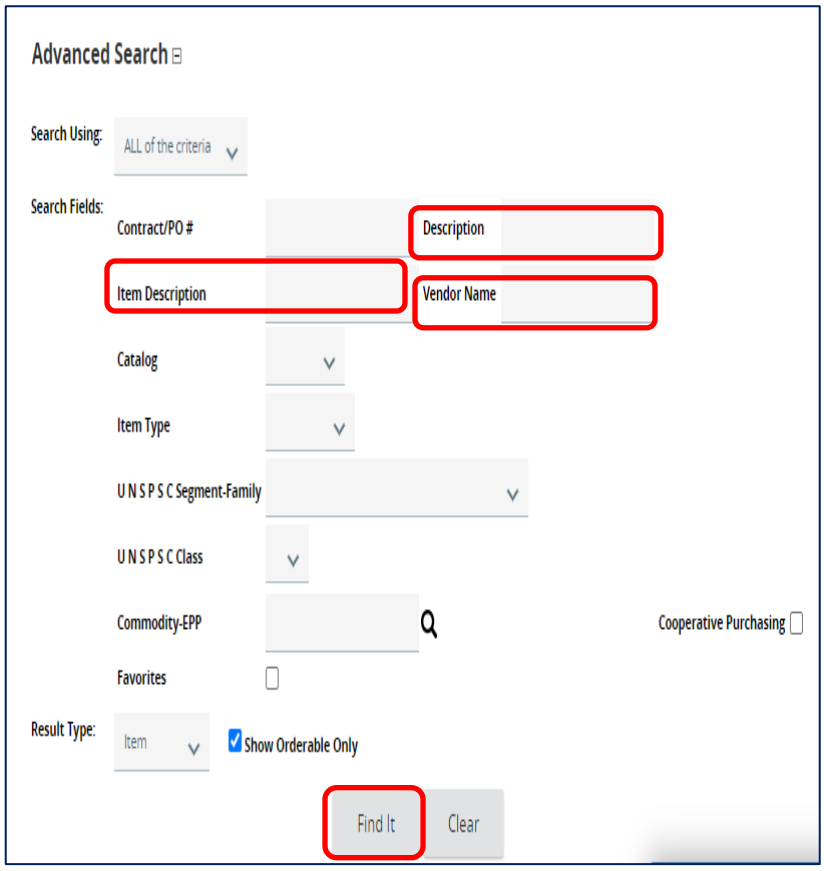
If using this method, skip to Step 2, otherwise see next page.

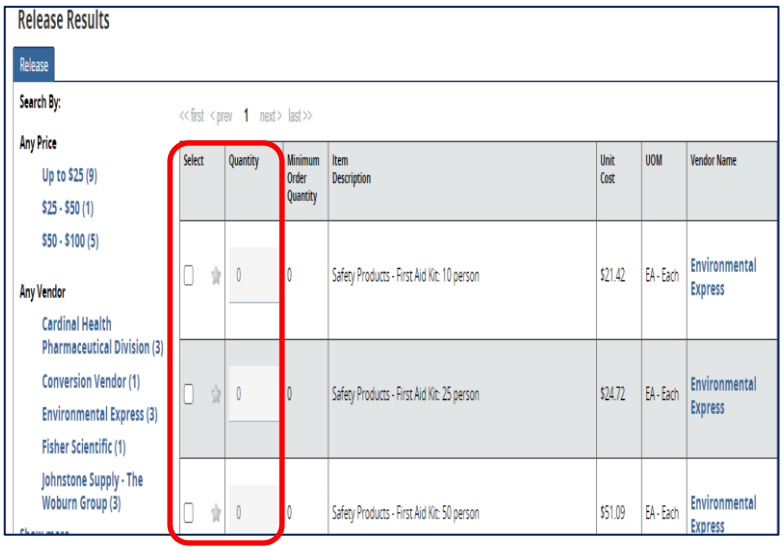
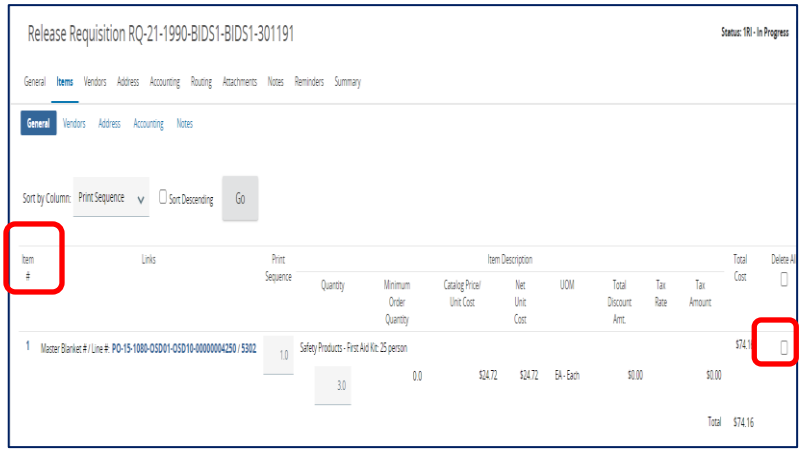
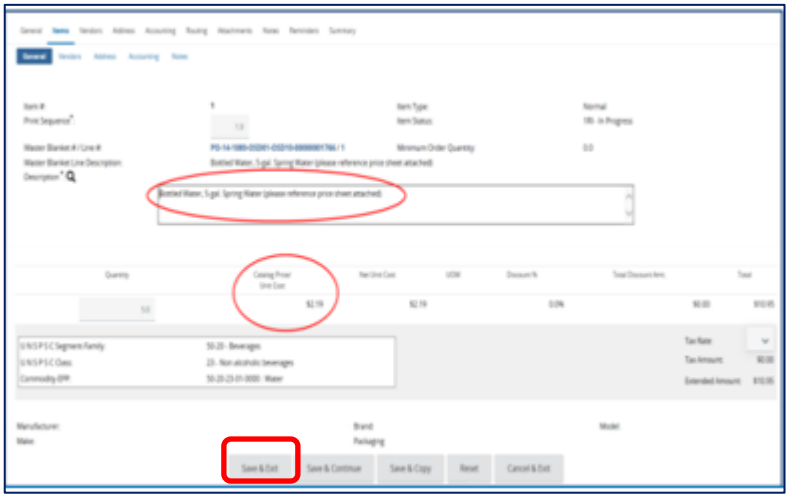
Screenshot	Directions
	Selecting a Requisition (Alternate Method)
	1. Click on the blue **Advanced** hyperlink at the top of the Home Page next to the magnifying glass icon.
	2. Click on the down arrow next to the **Document Type** field and select **Requisition**s from the dropdown menu.
	3. Search for an existing requisition by completing one or more fields and clicking on the **Search** button at the bottom.
	4. Select a requisition to clone by clicking on the blue hyperlink in the Requisition # column.

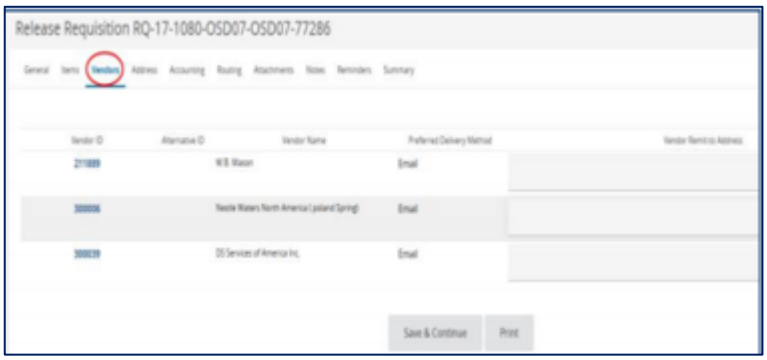
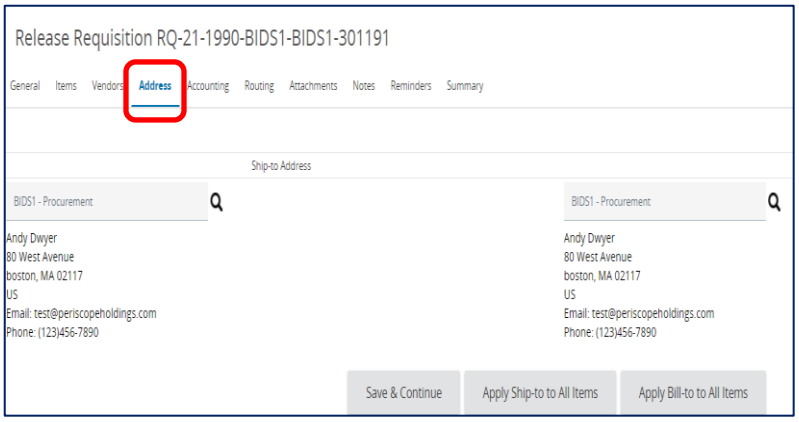
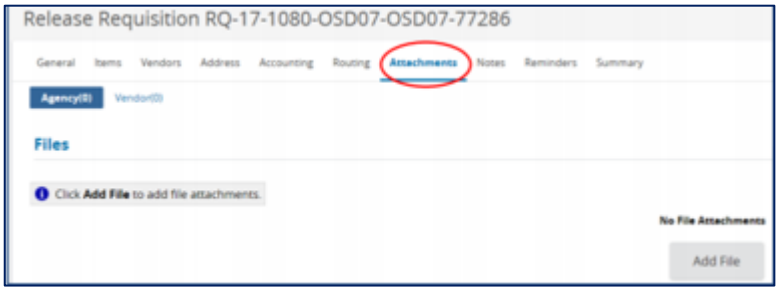
Screenshot	Directions
	**Step 2: Opening the Cloned Requisition** **1.** When the screen re-displays, click on the **blue hyperlink** for the cloned requisition in the **yellow System Warnings box.**
	2. The cloned requisition opens to the Summary tab. Click on the **General** tab.

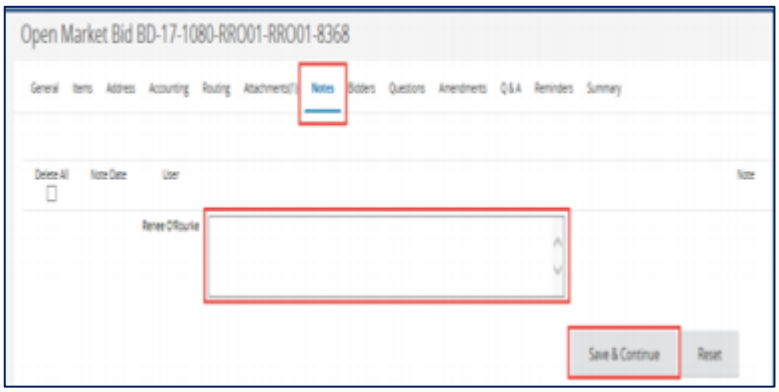
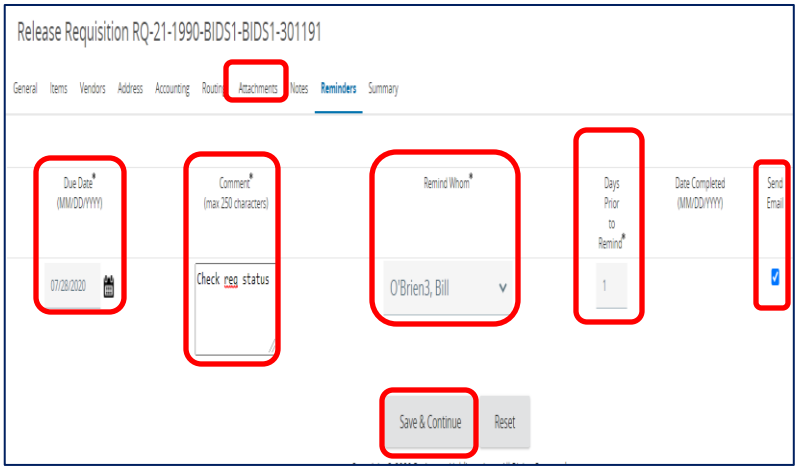
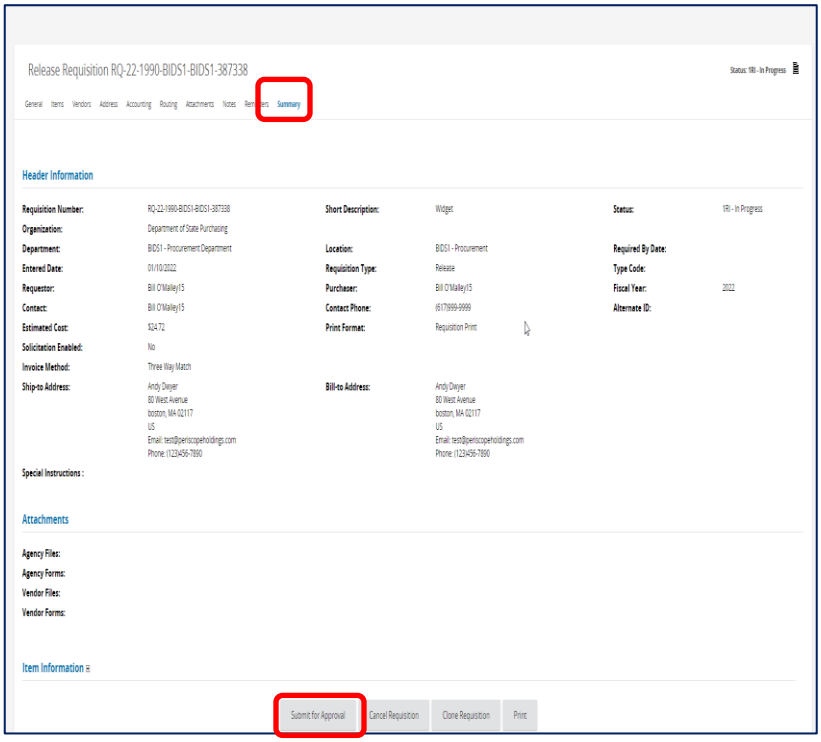
Screenshot	Directions
	**Step 3: Completing the General Tab - Left Side** The General tab page displays. **NOTE:** On this and all succeeding tab pages, retain fields that you wish to include in the cloned requisition and make changes on those fields that need updating. **NOTE:** Full details on creating a Statewide contract purchase can be found in the job *aid How to Make a Statewide Contract Purchase in COMMBUYS.*
	**Step 4: Completing the General Tab – Right Side** On the right side of the General tab, review all fields brought over from the original requisition. **NOTE:** On this and all succeeding tab pages, retain any fields that you wish to include in the cloned requisition and make changes on those fields that need updating. • **Short Description**: be specific as this field can also be used as search criteria to locate a requisition – can be used as a place for your department document number **NOTE**: In most cases involving cloning, the Short Description field will need to be updated. Click on the **Save & Continue** button at the bottom of the page to save the information modified on the General tab.

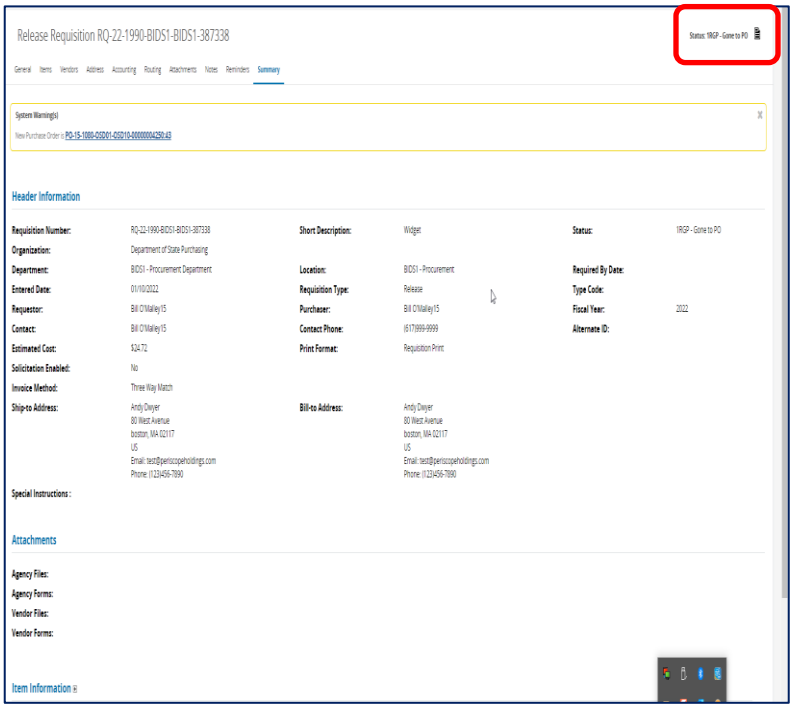
Screenshot	Directions
	**Step 5: Reviewing Item Information** The **Items** tab displays the existing items on the original requisition. Items can be modified, added, or deleted as needed. **NOTE**: If adding a new item, follow Steps 6 through 8, otherwise continue to Step 9 to modify or delete an existing item.
	**Step 6: Preparing an Item Search** 1. To add items to the requisition, click on the **Items** tab. 2. Click on the **Search Items** button to begin the process of adding contract goods or services to the requisition.

Screenshot	Directions
	**Step 7: Searching for Items** When the Advanced Search page displays, there are two different ways to search. One way is to input the search criteria in the **Search Using** field and click on the **Find It button**.
	The second way (the Preferred method) is to click on the **Plus Sign icon (+)** next to **Advanced Search** to open more search fields.
	Using the preferred method, you may search by one criterion or multiple criteria. The most often used fields are: • **Description**: Enter the Statewide Contract Number • **Vendor Name:** Enter the Vendor Name • **Item Description:** Enter the description of the good or service to be purchased. Click on the **Find It** button to reveal search results displayed at the bottom of the page.

Screenshot	Directions
	**Step 8: Selecting Items** The search results display the unit cost, unit of measure (UOM), vendor, etc. for each item. 1. Click on the **checkbox** next to the desired item in the **Select** column . 2. Enter a number in the **Quantity** field. 3. Click on the **Add to Req & Exit** button located at the bottom of the page.
 	**Step 9: Modifying or Deleting Item Information** To delete an item, select the checkbox to the right of the item to delete. To modify an item, change the quantity and/or click on the item number in the Item # column. **NOTE:** Items/services with a $0 unit cost need to be edited to enter a dollar value and item description. A price sheet may exist that provides item pricing. Follow instructions in the Contract User Guide. If quotes are needed, refer to the *"How to Request Quotes from Vendors* on Statewide Contracts" job aid. Click on the **Save & Exit** button when finished.

Screenshot	Directions
	**Step 10: Viewing the Vendor Tab** Click on the **Vendor** tab to view information about the vendor who will receive the PO and deliver the items. This information is auto populated based on the goods/services selected on the Items tab. If the vendor's name displays **Conversion Vendor or Solicitation Enabled,** click on the Items tab and select the Vendors sub tab. You will then select the vendor from whom you will purchase the items.
	**Step 11: Viewing/Editing the Address Tab** Click on the **Address ta**b. If no change is required, go to Step 12. If a change is needed: • Click on the **magnifying glass icon** • On the popup page, click on the **Find It** button • click on the **radio button** next to the desired address • Click on the **Select** button at the bottom of the page • When the popup screen dissolves click on the **Save & Continue** button. **NOTE:** The **Accounting** tab is not currently used in COMMBUYS. The **Routing** tab is not activated until after you submit the document for approval.
	**Step 12: Viewing/Editing the Attachments Tab** Click on the **Attachments** tab. Attachments may include bid attachments and required forms or contract documents, (e.g. T&Cs, SOWs, MOUs, etc.) If any files automatically attach, review and keep or delete as necessary. Click on the **Add File** button to add a new file. When complete, click on the **Save & Continue** button.

Screenshot	Directions
	**Step 13: Adding Notes** Click on the **Notes** tab if you would like to add an internal note that is not viewable by the Vendor. When complete, click on the **Save & Continue** button.
	**Step 14: Entering Reminders** Click on the **Reminders** tab if you want to send a reminder to yourself or another person within your organization. **NOTE:** Reminders are not brought over from the original requisition. When complete, click on the **Save & Continue** button.
	**Step 15: Viewing the Summary Tab** Click on the **Summary** Tab to view a summary of the nearly completed requisition. Review the Summary page information. Click on the **Submit for Approval** button to submit the requisition for approval.

Screenshot	Directions
	Step 16: Submitting for Approval Select **Automatic Approval** if available. Otherwise, select the appropriate approval path. The default approval path displays, or the purchaser is given the option to select an alternate approval path. Click on the **Save & Continue** button. **NOTE:** The requisition will now proceed through the approval path (no image is provided here as the approval path will vary). The Purchaser will be informed by COMMBUYS email when the approval is complete, at which point you can log back into COMMBUYS to view or continue with the next step. Click on the **Save and Continue** button.
	**Step 17: Viewing the Summary Tab** After approval, the Requisition Summary tab redisplays. The status has been updated to **Gone to PO.** **NOTE:** If the status is **Ready for Purchasing** after approval, then scroll to the bottom of the Summary tab page and click on the **Convert to PO** button.

Screenshot	Directions
	Step 18: Completing the PO Direct Release POs will automatically send after the requisition has been approved and the status displays as **Sent.** If this is not a Direct Release PO and your PO is in **Ready to Send** status, scroll to the bottom of the page and click on the **Save & Continue** button to send an email notification to the Vendor. **NOTE:** If you purchased from a Standard Release contract that is set up as a Distributor Model or is Solicitation Enabled, OSD recommends following the *How to Request Quotes from Vendors on Statewide Contracts* job aid which is in the COMMBUYS Bids section of the job aid page.