

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.

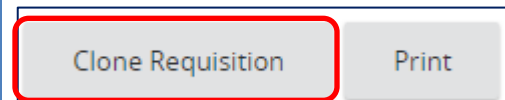
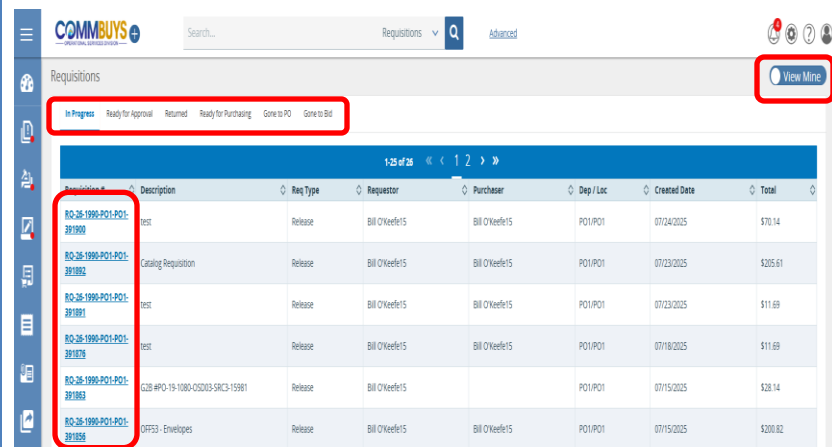
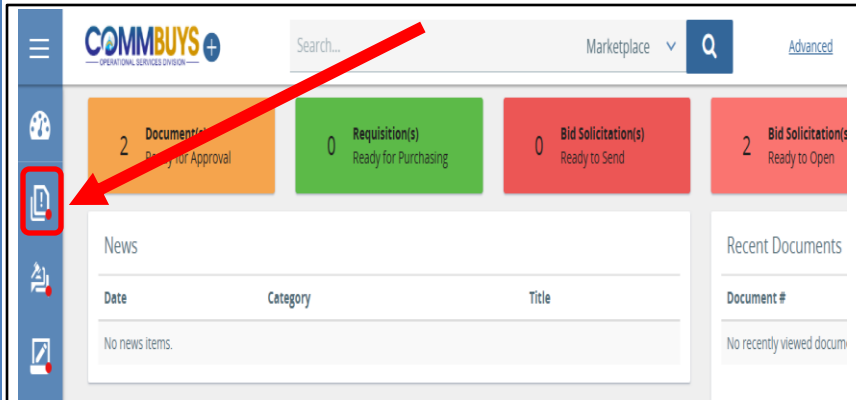
Screenshot

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 More** 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 **Requisitions** 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.

COMMBUYS+ OPERATIONAL SERVICES DIVISION

Search... Marketplace Q **Advanced**

COMMBUYS+ OPERATIONAL SERVICES DIVISION

Search...

Advanced Search

Document Type: Select Document Type... **Requisitions**

COMMBUYS+ OPERATIONAL SERVICES DIVISION

Search... Marketplace Q Advanced

Advanced Search

Document Type: Requisitions Match Criteria: All

Req # Alternate ID Description

Requestion Type Department Location

Select Requestion Type... Select Department... Select Location...

Status Requestor Buyer

Select Status... Select Requestor... Select Buyer...

Vendor Name Item Description

NIQP Class NIQP Class Item

Select Class ID... Select Class Item ID...

Search Clear

Results

1-25 of 58 << 1 2 3 >>

Requisition #	PO #	Description	Requisition Type	Created Date	Department / Location	Requestor	Total	Status
RQ-22-1990-PO1-PO1-387313	PO-19-1080-OSD03-OSD03-13725-485	G2B From Fastenal MRO FAC101	Release	12/21/2021	PO1/PO1	Bill O'Keefe2	\$294.98	Gone to PO
RQ-22-1990-PO1-PO1-387312	PO-19-1080-OSD03-OSD03-13725-491	Navy Hard War G2B From Fastenal MRO FAC101	Release	12/21/2021	PO1/PO1	Bill O'Keefe4	\$49.28	Gone to PO
RQ-22-1990-PO1-PO1-387311	PO-19-1080-OSD03-OSD03-13725-482	G2B From Fastenal MRO FAC101	Release	12/21/2021	PO1/PO1	Bill O'Keefe5	\$1,040.48	Gone to PO

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.

Release Requisition RQ-22-1990-BIDS1-BIDS1-387343

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

System Warning(s)

Cloned requisition [RQ-22-1990-BIDS1-BIDS1-387344](#)

Release Requisition RQ-22-1990-BIDS1-BIDS1-387344

General Items Vendors Address Accounting Routing Attachments Notes Reminders Summary

Header Information

Requisition Number:	RQ-22-1990-BIDS1-BIDS1-387344
Organization:	Department of State Purchasing
Department:	BIDS1 - Procurement Department
Entered Date:	01/11/2022
Requestor:	Bill O'Malley15
Contact:	Bill O'Malley15
Estimated Cost:	\$24.72
Solicitation Enabled:	No
Invoice Method:	Three Way Match
Ship-to Address:	Andy Dwyer 80 West Avenue boston, MA 02117 US Email: test@periscopeholdings.com Phone: (123)456-7890

Screenshot

General Items Address Accounting Routing Attachments Notes Reminders Summary

Requisition Number:

Status: 1RI - Requisition In Progress (When User request is created)

Department*: BIDS1 - Procurement Department ▾

Location*: BIDS1 - Procurement ▾

Required By Date:

Requisition Type: Release ▾

Requestor: Bill O'Malley15

Contact: Bill O'Malley15

Alternate ID:

Estimated Cost: \$0.00

Print Format: * Requisition Print ▾

Special Instructions :

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.

Short Description*: First Aid Kits

Fiscal Year: 2021 ▾

Organization: Department of State Purchasing

Solicitation Enabled: ☐

Entered Date: 07/22/2020

Type Code: ▾

Purchaser: O'Malley15, Bill ▾

Contact Phone: 617 999 9999 -

Tax Rate: ▾

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.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191 Status: 181 - In Progress

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	Master Blanket # / Line # PO-15-1088-OSD01-OSD10-00000004250 / 5302	1.0	3.0	0.0	\$24.72	\$24.72	EA - Each	\$0.00		\$0.00	\$74.16	<input type="checkbox"/>
											Total	\$74.16

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.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

There are no items. Please click 'Search Items' below to add an item.

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.

Search Using: Find It

Advanced Search

Add to Req & Exit Cancel & Exit

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Search Using: Find It

Advanced Search

Add to Req & Exit Cancel & Exit

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Advanced Search

Search Using: ALL of the criteria

Search Fields:

Contract/PO # Description

Item Description Vendor Name

Catalog

Item Type

UNSPSC Segment-Family

UNSPSC Class

Commodity-EPP

Favorites ☐

Result Type: Item ☒ Show Orderable Only

Cooperative Purchasing ☐

Find It Clear

Screenshot

Release Results

Release

Search By: << first < prev 1 next > last >>

Any Price

Up to \$25 (9)
\$25 - \$50 (1)
\$50 - \$100 (5)

Any Vendor

Cardinal Health Pharmaceutical Division (3)
Conversion Vendor (1)
Environmental Express (3)
Fisher Scientific (1)
Johnstone Supply - The Woburn Group (3)

Select	Quantity	Minimum Order Quantity	Item Description	Unit Cost	UOM	Vendor Name
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit 10 person	\$21.42	EA - Each	Environmental Express
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit 25 person	\$24.72	EA - Each	Environmental Express
<input type="checkbox"/>	0	0	Safety Products - First Aid Kit 50 person	\$51.09	EA - Each	Environmental Express

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.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191 Status: 191 - In Progress

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Sort by Column: Print Sequence ☐ Sort Descending

Item #	Links	Print Sequence	Quantity	Minimum Order Quantity	Catalog Price Unit Cost	Net Unit Cost	UOM	Total Discount Amt.	Tax Rate	Tax Amount	Total Cost	Delete All
1	Master Bidder # Line # PO-15-1000-02001-02010-0000004250 / 5302	1.0	3.0	0.0	\$24.72	\$24.72	EA - Each	\$0.00	\$0.00	\$74.16	<input type="checkbox"/>	
Total											\$74.16	

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.

General **Items** Vendors Address Accounting Routing Attachments Notes Reminders Summary

General Vendors Address Accounting Notes

Item # 1
Print Sequence 1.0
Item Type Normal
Item Status 191 - In Progress

Master Bidder # Line # PO-15-1000-02001-02010-0000004250 / 5302
Master Bidder Line Description: Bidder Water, Sugar Spring Water (please reference price sheet attached)

Quantity 3.0
Catalog Price Unit Cost \$24.72
Net Unit Cost \$24.72
UOM EA - Each
Discount % 0.00%
Total Discount Amt. \$0.00
Tax Rate
Tax Amount
Extended Amount \$74.16

Manufacturer: Water
Brand: Packaging
Model:

Screenshot

Vendor ID	Alternative ID	Vendor Name	Preferred Delivery Method	Vendor Name to Address
211889	WIS Mason		Email	
300006	Neske Waters North America (Joland Springs)		Email	
300039	DS Services of America Inc.		Email	

Save & Continue Print

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.

Ship to Address

BIDS1 - Procurement

Andy Dwyer
80 West Avenue
Boston, MA 02117
US
Email: test@periscopeholdings.com
Phone: (123)456-7890

Save & Continue Apply Ship-to to All Items Apply Bill-to to All Items

Step 11: Viewing/Editing the Address Tab

Click on the **Address** tab. 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.

Click Add File to add file attachments.

No File Attachments

Add File

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

Open Market Bid BD-17-1080-RR001-RR001-8368

General Items Address Accounting Routing Attachments **Notes** Bidders Questions Amendments Q&A Reminders Summary

Delete All Note Date User Note

Remainder of form is empty.

Save & Continue Reset

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.

Release Requisition RQ-21-1990-BIDS1-BIDS1-301191

General Items Vendors Address Accounting Routing Attachments **Reminders** Summary

Due Date* (MM/DD/YYYY) 07/28/2020

Comment* (max 250 characters) Check req status

Remind Whom* O'Brien, Bill

Days Prior to Remind* 1

Date Completed (MM/DD/YYYY)

Send Email

Save & Continue Reset

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.

Release Requisition RQ-22-1990-BIDS1-BIDS1-387338 Status: 100 - In Progress

General Items Vendors Address Accounting Routing Attachments Notes Reminders **Summary**

Header Information

Requisition Number:	RQ-22-1990-BIDS1-BIDS1-387338	Short Description:	Widgets	Status:	100 - In Progress
Organization:	Department of State Purchasing	Location:	BIDS1 - Procurement	Required By Date:	
Department:	BIDS1 - Procurement Department	Requisition Type:	Release	Type Code:	
Entered Date:	01/10/2022	Purchaser:	Bill O'Malley	Fiscal Year:	2022
Requester:	Bill O'Malley	Contact Phone:	(617) 999-9999	Alternate ID:	
Estimated Cost:	\$24.72	Print Format:	Requisition Print		
Solicitation Enabled:	No				
Invoice Method:	Three Way Match				
Ship-to Address:	Andy Oger 80 West Avenue Boston, MA 02117 US Email: test@pentacopholdings.com Phone: (123) 456-7890	Bill-to Address:	Andy Oger 80 West Avenue Boston, MA 02117 US Email: test@pentacopholdings.com Phone: (123) 456-7890		

Special Instructions :

Attachments

Agency Files:
Agency Forms:
Vendor Files:
Vendor Forms:

Item Information :

Submit for Approval Cancel Requisition Clone Requisition Print

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 redisplay. 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.

Release Requisition RQ-22-1990-BIDS1-BIDS1-387338

Status: RQP - Gone to PR

General

Items

Vendors

Address

Accounting

Routing

Attachments

Notes

Reminders

Summary

System Messages

New Purchase Order ID: PO-15-1088-65201-52013-0000004230-43

Header Information

Requisition Number: RQ-22-1990-BIDS1-BIDS1-387338 Organization: Department of State Purchasing Department: BIDS1 - Procurement Department Entered Date: 01/10/2022 Requester: B01Malley15 Contact: B01Malley15 Estimated Cost: \$34.72 Solicitation Enabled: No Invoice Method: Three Way Match Ship-to Address: Andy Cayer 80 West Avenue Boston, MA 02117 US Email: test@percipesholdings.com Phone: (123456-7890)	Short Description: Widge Location: BIDS1 - Procurement Requisition Type: Release Purchaser: B01Malley15 Contact Phone: (617)989-0000 Print Format: Requisition Print Bill-to Address: Andy Cayer 80 West Avenue Boston, MA 02117 US Email: test@percipesholdings.com Phone: (123456-7890)	Status: RQP - Gone to PO Required By Date: Type Code: Fiscal Year: 2022 Alternate ID:
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Special Instructions:

Attachments

Agency File:
Agency Forms:
Vendor File:
Vendor Forms:

Item Information

Screenshot

Release Purchase Order PO-15-1080-OSD01-OSD10-00000004250:44

General Items Vendor Address Accounting Routing Attachments Notes Change Orders Reminders Summary

Status: 3P5 - Sent

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.