

# Shasta County Office of Education

## Copy a Vendor Requisition

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Site users may copy a requisition to the sequential fiscal year beginning on May 1<sup>st</sup>

Note: Be sure to verify the vendor address when copying vendor requisitions. The address is not validated when a requisition is copied. If the vendor address record was updated after the original requisition was entered, the user will need to delete the number in the Vendor Id field and re-enter it in order for the software to pull the *current* address from the vendor database. We have a change request (CR10386) in with Escape to fix this issue but it has not been assigned to a release.

1. Select Finance-Requisitions-Vendor Requisitions from the Activities tree
2. On the Search tab enter criteria for requisition(s) to be copied and press the Go button located on the Search tab toolbar
3. On the List tab highlight the requisition to be copied
4. From the List tab toolbar click on the Copy button

Note: If you viewed the requisition prior to copying it, you'll need to close the Form tab in order to utilize the Copy button on the List tab. When the Form tab is open the Copy button on the List tab is disabled.

5. Select the fiscal year for the new requisition (applicable when two fiscal years are open) and press OK button
6. The Form tab will open. The Form tab header will indicate Copy of Req# R30##-#####

Note: Attachments *and* Notes do not copy to the new requisition

7. View the individual tabs of the requisition and make necessary changes applicable to the new requisition
8. Press Save/Close
9. On the List tab, highlight the requisition then press the snapshot icon on the List tab toolbar
10. Verify entries
11. Close the snapshot
12. From the List tab toolbar press the Open button
13. From the Form tab toolbar click on Tasks and then press Submit
14. From the List tab verify that the requisition Status=Submitted