Requisition Conversion

Open the Requisition Conversion to POs program

Financials > Purchasing > Purchase Order Processing Menu > Requisition Conversion



The Requisition Conversion program when opened.

| 🧩 ном | IE | | | Reg | uisition Conversion - Munis [R | lacine County TRAIN | 10/06] |
|---------------|---------------|---------------------|-----------------|---------------------------|--------------------------------|---|--------------|
| Accept Cancel | Search Browse | Add Update Colobal | Print Text file | Excel Word Excel Email | Attach Notes Audit | Batch Process Sort Merge and S Select | split Return |
| Confirm | Search | Actions | Output | Office | Tools | Menu | |
| PO Batch | | | | | | | |
| Number 3 | Year | Period | | | | | |
| Code | PO Number Ye | ar Requisition Dept | Vendor V | endor Name | (| Commodity Code | Description |

Click Search to search for requisitions to convert.



The program opens a new screen containing a Find Criteria section. Click Search followed by Accept to search for all requisitions to be converted

| % | HOM | E | | | | |
|---------------|-------------|-------------|----------|-----|--------|-----------------------------------|
| Accept | Ø Cancel | Q Search | I Browse | Add | Update | X Delete O Global * |
| Conf | īrm | | Search | | Actio | ons |
| Find Crit | eria | | | | h | |
| Requisiti | ion | | | | | |
| Departm | ent/Loca | ation | | | | |
| Vendor | | | | | | |
| Buyer ID |) | | | | | |
| Entry dat | te | | | | | |
| Review of | code | | | | | |
| General | commo | dity | | | | |

The search resulted in two requisitions

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|-----------|-------------|-------------|-----------------------------|------------|--------|-----------------------------------|--------|------------|------------|---------------------------|-------------|--------------|------------------|-------------------------|----------------------------|------------|
| Accept | Ø Cancel | Q Search | 💷 Browse 🔛 Query Builder | Add U | Jpdate | X Delete O Global * | Print | Text file | X Excel | Word Email Schedule | U Attach | Notes Notify | Audit 🔛 Maplink* | Batch Sort Select | Process Merge and Split | Return |
| Conf | īrm | | Search | | Actio | ns | | Output | | Office | | Tools | | | Menu | |
| PO Batc | h | | | | | | | | | | | | | | | |
| Number | 3 | | Year | | | Period | | | | | | | | | | |
| Code | PO | Number | Year | Requisitio | n Dept | Vende | or Ven | dor Name | | Descripti | on | | | Am | ount RevC | Entered on |
| | | | 2016 | 00000051 | 1 FIN | 00100 | 1 180 | 0 RADIATOR | OF SE | WI test | | | | 10 | 0.00 | 12/12/2016 |
| | | | 2016 | 00000049 | 9 FIN | 00155 | 8 CO | MMAND CEN | TRAL L | LC LICENSE | AND S | UPPORT A | GREEMENTI | 9,90 | 0.00 | 11/16/2016 |

The next step is to create a batch number to attach to the requisition. This can be found in the top right hand corner of the program under the heading Batch



After clicking Batch you will want to enter the PO Batch Number (any 6 digit number combination, it also can be reused) the Fiscal Year for the PO and the Period (automatically defaults in) followed by the Accept option.

| \$ | HOME | | | | | | | | Rec | luisition | Conversior | n - Munis [Rad | cine County | TRAIN | 10/06] |
|--------|-------------|--------|-----------------------------|------------|---------|-----------------------|-------------|-----------------------|---------------------------|-------------|--------------|-----------------------|-------------|--------|------------|
| Accept | Ø Cancel | Search | 🔲 Browse 🔝 Query Builder | Add | Update | X Delete G Global+ | Print De Po | kt file F Excel | Word Email Schedule | U Attach | Notes Notify | Audit 🕀 Audit 🕀 Audit | Return | | |
| Con | firm | | Search | | Actio | ns | Output | | Office | | Tools | | | | |
| Number | 123456 | 6 | Year | 2016 | | Period 12 |] | | | | | | | | |
| Code | PO I | Number | Year | Requisitio | on Dept | Vendo | Vendor Na | me | Descripti | on | | | Amoun | t RevC | Entered on |
| | | | 2016 | 0000005 | 51 FIN | 001001 | 1800 RADI | ATOR OF SE | WI test | | | | 100.00 |) | 12/12/2016 |
| | | | 2016 | 0000004 | 19 FIN | 001558 | COMMANE | CENTRAL L | LC LICENSE | AND S | UPPORT A | GREEMENT | 9,900.00 |) | 11/16/2016 |

The next step is to Select the requisition(s) for approval. The Select option is found in the top right hand side of the program

| Batch | Process | |
|--------|-----------------|----------|
| Sort | Merge and Split | Return |
| Select |] | recentri |
| | Menu | |

After choosing Select the Code option is available to Approve, Reject or Export the requisition. We will choose to Approve the requisition.

| К НОМЕ | E | | | | | | Reg | uisition C | Conversion | - Munis [Rac | ine County | TRAIN 10/06 | 6] |
|-----------------|---------------------------------|------------------------------|-------------------------------------|--------------------------------|---------------------------------|-----------------------------------|--------------------------------------|----------------------------|-------------------|---------------|--------------|----------------------------------|--|
| Accept Cancel | Q Browse Search Query Builde | er Add | Update X C | Delete Global≁ Duplicate | Print | Text file PDF Preview | Word | U Attach | Notes Notify | Audit 🗟 Audit | View Requisi | tion Return | |
| Confirm | Search | | Actions | | Outp | ut | Office | | Tools | | Menu | | |
| PO Batch | | | | | | | | | | | | | |
| Number 123456 | | | | | | | | | | | | | |
| 120400 | o Year | 2016 | F | Period | 12 | | | | | | | | |
| Code | PO Number | 2016 Year | Requisition | Period Dept | 12 Vendo | Vendor Na | me | Descript | tion | | | Amount Rev | C Entered on |
| Code Approve | PO Number +1 | 2016 Year 2016 | Requisition 00000051 | Dept FIN | 12 Vendo 001001 | Vendor Na 1800 RADI | me ATOR OF SE WI | Descript test | tion | | | Amount Rev | C Entered on 12/12/2016 |
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After choosing the Approve option and clicking Accept, we then will Process the requisition conversion. This option is at the top right hand corner of the program.



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This converts the requisition to a Purchase Order leaving the remaining step to then print the purchase order through the Print Purchase Orders program or if you have Auto Print it will end the process after converting the requisitions.