





# Processing Approved Purchase Requisitions to Purchase Orders

## Assigning A Purchase Requisition To A Buyer

### General Notes and When To Use:

-  **Used By:** Personnel Authorized To Assign Buyers To Purchase Requisitions
-  **Domain:** Materials
-  **Module:** Procurement Planning
-  **When:** To assign a buyer to a Purchase Requisition, which was not assigned at requisition creation. Required to proceed with Purchase Ordering.  
*Note: Buyers are assigned 1) during the entry of the purchase requisition, or 2) after the purchase requisition ID has been created, and before a Purchase Order can be created.*

Before turning REQs into a PO, confirm all REQs have a Buyer assigned. If not assigned, then select Buyer at this step before proceeding to the next.

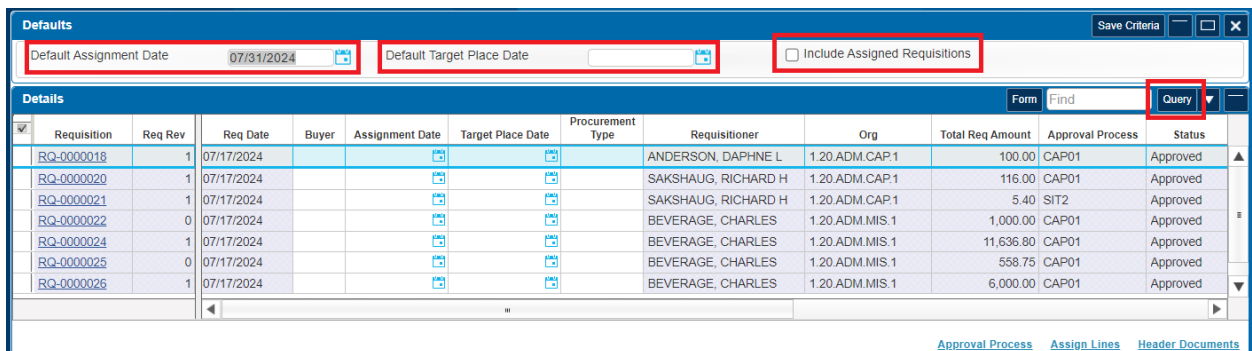
### Instruction:

**Materials > Procurement Planning > Purchase Requisitions > Assign Purchase Requisitions to Buyers**


#### 1) Query for Purchase Requisitions

**Tip:** Use the Default Section to enter dates, and select the Include Assigned Requisitions checkbox to include already assigned requisitions in the query results

If REQ number is known, change query criteria to “contains” and enter number (i.e. 18 for RQ-000018) to find a specific REQ faster.



Req	Requisition	Req Rev	Req Date	Buyer	Assignment Date	Target Place Date	Procurement Type	Requisitioner	Org	Total Req Amount	Approval Process	Status
	RQ-0000018	1	07/17/2024					ANDERSON, DAPHNE L	1.20.ADM.CAP.1	100.00	CAP01	Approved
	RQ-0000020	1	07/17/2024					SAKSHAUG, RICHARD H	1.20.ADM.CAP.1	116.00	CAP01	Approved
	RQ-0000021	1	07/17/2024					SAKSHAUG, RICHARD H	1.20.ADM.CAP.1	5.40	SIT2	Approved
	RQ-0000022	0	07/17/2024					BEVERAGE, CHARLES	1.20.ADM.MIS.1	1,000.00	CAP01	Approved
	RQ-0000024	1	07/17/2024					BEVERAGE, CHARLES	1.20.ADM.MIS.1	11,636.80	CAP01	Approved
	RQ-0000025	0	07/17/2024					BEVERAGE, CHARLES	1.20.ADM.MIS.1	558.75	CAP01	Approved
	RQ-0000026	1	07/17/2024					BEVERAGE, CHARLES	1.20.ADM.MIS.1	6,000.00	CAP01	Approved





2) In the Buyer field, click the spyglass  to query and select a Buyer to be assigned to the record.

**Result:** The Assignment Date and Target Place Date will default dates if default

3) Click the **Save**  icon to save Record.

## Preparing A Purchase Requisition For A PO (Applying PO Info to Purchase Requisitions)

### General Notes and When To Use:

-  **Used By:** Buyers
-  **Domain:** Materials
-  **Module:** Procurement Planning
-  **When:** To review and prepare the requisition lines for creating purchase order lines. This step provides the opportunity to add additional information as required for the purchase before the PO is created.

Before turning a REQ into a PO, review the header/line documents, gather quotes and other needed information. This can be done on this screen prior to further Costpoint actions or on the Manage Requisitions screen.

### Instructions:

**Materials > Procurement Planning > Purchase Requisitions > Apply PO Info To Purchase Requisitions**

- 1) **Query** for Purchase Requisition record(s).
- 2) Click the **Assign PO** subtask

Purchase Requisitions												
Requisition ID	Revision	Approval Process	Status	Submit for Approval	Trans Currency	Requisitioner *	Requisitioner Name	Organization	Requisitioner Phone	Requisitioner Extension	Req Date	
RQ-0000019	0	CAP01	Rejected	<input type="checkbox"/>	CLP	8480264	ANDERSON, DAPHNE L	1.20.ADM.CAP.1			07/17	
RQ-0000020	1	CAP01	Approved	<input type="checkbox"/>	USD	6125058	SAKSHAUG, RICHARD H	1.20.ADM.CAP.1			07/17	
RQ-0000021	1	SIT2	Approved	<input type="checkbox"/>	USD	6125058	SAKSHAUG, RICHARD H	1.20.ADM.CAP.1			07/17	
RQ-0000022	0	CAP01	Approved	<input type="checkbox"/>	USD	2648	BEVERAGE, CHARLES	1.20.ADM.MIS.1			07/17	
RQ-0000023	0	GRANTS	Approved	<input type="checkbox"/>	USD	6125058	SAKSHAUG, RICHARD H	1.20.ADM.CAP.1			07/17	
RQ-0000024	1	CAP01	Approved	<input type="checkbox"/>	USD	2648	BEVERAGE, CHARLES	1.20.ADM.MIS.1			07/17	
RQ-0000025	0	CAP01	Approved	<input type="checkbox"/>	USD	2648	BEVERAGE, CHARLES	1.20.ADM.MIS.1			07/17	

Header Text   Header Approvals   **Assign PO**   Assign PO - Combined   Totals   Exchange Rates   Header Documents

3) If assigning requisition to a new PO number:

- a) The Assign PO Defaults tab will default to “Assign Now.” Keep this unchanged if you are preparing to assign a new PO number.
- b) Click the **Autoload** button to load requisition lines ready to be assigned a purchase order number and line.

Purchase Requisitions > Assign PO							
Req Line *	Ready For PO	Auto-Assign PO	Item	Item Rev	Description	Vendor *	Vendor Name
Requisition ID: RQ-0000022   Requisition Total: 1,000.00							
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>							

Autoload   Assign PO IDs   Load Blanket PO Cost   Recalculate  
Resources   Exchange Rates   Close

c) Verify a new PO number is present in the Purchase Order column.

Req Line	Ready For PO	Auto-Assign PO	Item	Item Rev	Description	Vendor	Vendor Name	Vendor Address	Req Ln Pref Vendor	Purchase Order	Release	Blanket Line	PO Line	PO (P)
1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	GOODS		telescope handle	6173914	AJ TUCK COMPANY		CHK	PO-0000001		0		1

- 4) If assigning a requisition to multiple vendors, choose the appropriate vendor for each requisition line. This will assign multiple PO numbers, one for each unique vendor, once Saved.
- 5) If assigning a requisition to an existing PO number (as in the case of a change order):
  - a) Click the “Combine with Other Requisitions” box.
  - b) Within the Assign PO Defaults tab, change Assign PO Option to Manual and select the PO number in the PO field.

Req Line	Statu	PO	Rel	Vendor	Order Date	PO Total Amount	Change Order	RMA	Customer
1	Approved	384293	0	7830701	07/22/2024	104,999.16	0		
		384313	0	7873736	07/23/2024	3,779.97	0		
		384324	0	8860945	07/24/2024	31,949.00	0		
		384328	0	170289	07/24/2024	675.00	0		
		PO-0000001	0	6173914	08/16/2024	6,000.00	1		


c) Click Autoload and verify the existing PO number is present in the Purchase Order column.

Note 1: Avoid making any changes to the Header on this screen, because changes to the Header will require additional Requisition approvals.

Note 2: Add any missing required information in the Assign PO lines (not the Requisition Header or Requisition Line sections), such as Buyer or Vendor, before saving.

Note 3: Before selecting “Autoload,” ensure the record is in Table view to avoid errors. If the error occurs, just select the line in the Assign PO window, then delete. After, you will be able to autoload as expected.

6) Click the **Save**  icon to save Record

**If using Contract – Subcontract Records, validate the Subcontract ID Field is completed in this step (prior to Saving) so that the records are linked before the PR moves to PO Generated status. Review the Subcontract Information Tab: Subcontractor ID field, click the spyglass  to query and select a Subcontract ID to be assigned to the record:**



**IMPORTANT NOTE:**

The PO number shown is “assigned” as a placeholder at this step – to complete the process of creating the Purchase Order, see Instruction Creating A Purchase Order From Purchase Requisition.

## Creating A Purchase Order From Purchase Requisition

### General Notes and When To Use:

- Used By:** Buyers
- Domain:** Materials
- Module:** Procurement Planning
- When:** To create a Purchase Order from a Purchase Requisition. The Purchase Requisition must have been processed through “Apply PO Info To Purchase Requisitions”. Once this process is completed, the Purchase Order Register will print.

### Instruction:

**Materials > Procurement Planning > Purchase Requisitions > Create Purchase Orders**

- 1) **Enter parameters** for locating the purchase requisition to create a PO. You can review by Buyer, by vendor, by requisition number, or by PO (if previously assigned).

- 2) **Preview** by clicking on the Preview icon.

- 3) Click on the **Gears** **icon arrow** and select **Create Purchase Orders**.

4) Open the Printout and review / save as necessary for reference.

**Note:** If using the Create Purchase Order screen to push a PR to existing Purchase Order, the PR will update to PO Generated status and when you view your PO (remember to refresh if you had the screen open), you will see new Requisition lines now in the previously existing PO.

In order to finalize the new Purchase Order, go to Manage Purchase Orders at [Materials > Purchasing > Purchase Orders > Manage Purchase Orders](#).

**Manage Purchase Orders**

Identification  
 Purchase Order ID: PO-0000001 Release: 0 Change Order: 0 Type: Subcontractor Agreement Trans Currency: USD

Header | Other Information | Accounting Defaults | Other Defaults | Vendor Address | Bill To & Return Address | Blanket Info | Subcontract Information

Buyer: PURCHSUP ROMERO, MAGDALENE A Organization: 1.20.ADM.CAP.1  
 Vendor: 6064849 UNIVERSITY OF VIRGINIA-EF | N Status: Pending  
 Vendor Address: EFT Business Size: Large  
 NAICS Code: NAICS Eff. Date: SBA Std Size (M USD): SBA Std Size (# of Emp):  
 Order Date: 07/16/2024 UEI Number: Procurement Type:    
 Intracompany Vendor  Print UEI Number  Load Part/Rev ID

Sales Tax/VAT Total: 0.00 PO Total: 22,000.00 Create Blanket PO Release

Header Notes | Header Text | Header Documents | PO Totals | Exchange Rates

**Purchase Order Lines**

PO Line *	Line Type	Status *	RMA	RMA Line	Item	Rev	Description	Part Security	Misc Type	U/M	Due Date	Desired Date
1	S	Pending			SERVICES		development of ALMA uses	N/A		EA	07/15/2025	07/15/2025

Action History | Resources | Accounts | Line Charges | Line Text | Line Documents | Currency Line

Do a Query search for the new PO in Manage Purchase Orders. It will be in “Pending” status. Please review the purchase order details, make any updates or revisions, add any additional attachments, select the appropriate standard text available under Header Text, and add any new Header Notes. In addition, make sure all the required fields are populated, like Vendor and Ship ID. Add the Procurement Type if it has not been selected yet. New documentation can be attached to the Header or lines.

To add standard text that will be printed on the PO in the Header, click Header Text, click New, start a sequence with 1, do a search in the Text Code (see below), and select your choice. For additional standard text, click New again, set it as the next number in sequence, and so on.

**Manage Purchase Orders > Header Text** New Copy

Purchase Order ID: PO-0000001 Release: 0

Sequence *	Text Code *	Rev *	Description	Doc Print Option	Text Active
→ 1	NRAOGB PO	0	AUI manages NRAO & GBO	B	<input checked="" type="checkbox"/>
→ 2	BILLING US	0	US billing info	B	<input checked="" type="checkbox"/>
→ 3	T&C UNDER	0	Terms & Conditions under \$100k	B	<input checked="" type="checkbox"/>
→ 4	REPS CERTS	0	Reps and Certs	B	<input checked="" type="checkbox"/>

The Text Code lookup includes the standard text options below and others.

Lookup				
Query ▼				
<input checked="" type="checkbox"/>	Text Description ▼	Text Code	Rev	Doc Print Option
	AUI Chile address info	CHILE PO	0	B
	AUI Consultant Agreement	AUICONSULT	0	B
	AUI PO header	AUI PO	0	B
	AUI manages NRAO & GBO	NRAOGBO PO	0	B
	Certificate of Insurance	COI	0	B
	Certificate of Insurance - NM	COI NM	0	B
	Chile terms and billing info	CHILE TERM	0	B
	Contract	CONTRACT	0	B
	Federal Subaward Agreement	SUBAWARD	0	B
	Limit of Liability-Fully Fund	LOF	0	B
	Reps and Certs	REPS CERTS	0	B
	Scope of Work	WORKSCOPE	0	B
	Terms & Conditions over \$100k	T&C OVER	0	B
	Terms & Conditions under \$100k	T&C UNDER	0	B

As an example, most every NRAO standard PO placed in the U.S. will include:

- NRAOGBO PO
- BILLING US
- T&C (for the appropriate range)
- REPS CERTS

Print Preview the PO to assure it will contain the information required prior to being Open.

Once everything is complete, the PO approval process can begin in order to change the “Pending” status to “Open” status. This occurs at Materials > Purchasing > Purchase Orders > Approve Pending Purchase Orders. If the PO is within your commitment threshold, you can navigate to this screen and change the status to “Open.” If the PO exceeds your threshold, please contact the appropriate Contracts and Procurement team member and ask that they access the pending PO, review, and approve to send it to “Open.”

**Approve Pending Purchase Orders** 1 of 1 Existing Table Query

Identification  
 PO PO-0000001 Rel 0 Change Order 0  Open Subcontract

PO Type Subcontractor Agreement Proc Type Order Date 07/16/2024 Trans Currency USD  
 Vendor 6064849 UNIVERSITY OF VIRGINIA-EF Buyer PURCHSUP Organization 1.20.ADM.CAP.1  
 NAICS Code Business Size Large

Functional Currency Amounts  
 Buyer Max Auth PO Limit 100,000.00 Buyer Max Auth PO Line Limit 100,000.00 PO Amount 22,000.00

Header Text Header SOW Exchange Rates Header Documents

**PO Line Information** Form Query

Line	Open	Line Type	Resource Exists	Item	Rev	Description	Misc Type	Proc Type	Requisition	Part Security	Inv Abbrev	Over Ship	Due Date
1	<input type="checkbox"/>	S		SERVICES		development of ALMA uses			RQ-0000004	N/A		N	07/15/2025





Line Text Line SOW Resources Purchase Order Line Detail Inquiry Subcontract PO Line Detail Line Documents Link SCI/SAP Security Codes Delivery Schedule

Once the Status of a PO is “Open,” it is ready to receive upon. If you wish for a PO to be unavailable for receiving, change PO status back to Pending.

The next step will be to print and issue the Open Purchase Order.

## Print Purchase Orders

### General Notes and When To Use:


-  **Used By:** Buyers
  -  **Domain:** Materials
  -  **Module:** Purchasing
  -  **When:** To print and issue a purchase order
- Note: DO NOT USE FOR PRINTING CHANGE ORDERS! There are separate instructions for printing change orders!**

### Instruction:

**Materials > Purchasing > Purchase Orders >  
Print Purchase Order**

1) **Enter Selection Range parameters** for printing (such as Purchase Order Option “One” and entering the PO Number in the field provided) .

2) **Preview** the Print by clicking on the Preview  icon.

3) Click on the **Print**  icon arrow, and select **Purchase Order**, or Batch Mode Purchase Order applicable to the parameters (one or multiple purchase requisitions).

**Result:** *The Process Complete window will indicate 100% and the output file will be available*

4) **Review the output file** to verify it looks correct and does not need to be reprinted.

The generated PO electronic file can now be signed electronically by the assigned Buyer and saved. This signed, printed PO can now be emailed to the Vendor, Fiscal, Receiving Clerk, and any other party. Then, after refreshing Costpoint, go to the Manage Purchase Orders Other Information tab and Click “Released to Vendor” when the PO has been sent to them.

The screenshot shows a software interface with several tabs: Header, Other Information, Accounting Defaults, Other Defaults, Vendor Address, Bill To & Return Address, Blanket Info, and Subcontract Information. The 'Other Information' tab is active. On the left, there are fields for Vendor Terms (NET 30), FOB Point, CIS Code, Cost Saving Amt (0.00), and Last Change Date. On the right, there is a 'Contact' section with fields for Last Name, First Name, Phone, Fax, and Email Address. A red box highlights the 'Released to Vendor' checkbox and the 'Released Date' field.

Save the PO and any other files to the “Purchase Orders FYxx” folder in the Contracts shared folder with PO number and vendor name in the folder name.

## Printing A Purchase Requisition

### General Notes and When To Use:




- ✚ **Used By:** Personnel Authorized To Edit and View Purchase Requisitions
- ✚ **Domain:** Materials
- ✚ **Module:** Procurement Planning
- ✚ **When:** To print a Purchase Requisition.

### Instruction:

***Materials > Procurement Planning > Purchase Requisitions > Print Purchase Requisitions***

- 1) **Enter parameters** for printing (such as enter the requisition number(s) in the Requisition fields).



- 2) **Preview** the Print by clicking on the Preview  icon.
- 3) Click on the **Print**  icon arrow, and select Purchase Requisitions, or Batch Mode Purchase Requisitions applicable to the parameters (one or multiple purchase requisitions).  
**Result:** *The Process Complete window will indicate 100% and the output file will be available.*
- 4) Review the output file to verify it looks correct and does not need to be reprinted.
- 5) Click on the Gears  to Update Purchase Requisition printed flag.  
**Note:** *If you receive a “fatal error”, disregard. This error occurs if Print Options Settings -> Actions -> Port-Report Settings “Execute Update... Flag after reports are printed” is checked*

## Combining Multiple Requisitions to a Single PO

### Apply PO Info to Purchase Requisitions

Use this application to combine multiple purchase requisition lines with the same vendor/buyer combination to a single purchase order. The example below depicts the scenario, where multiple purchase requisitions are created by MRP and combined.

Materials > Procurement Planning > Purchase Requisitions > Apply PO Info to Purchase Requisitions

**Purchase Requisitions** | New | Copy | Delete | Attach | 1 of 29 Existing | Table | Find | Query

Identification: Requisition ID: RQ-0000001 | Rev: 6 | Approval Process: SIT2 | Status: Approved | Submit for Approval:  | Trans Currency: CLP

Header | Accounting Defaults | Other Information | Notes | Assign PO Defaults | Subcontract Information

Requisitioner: Requisitioner\*: 8480264 | ANDERSON, DAPHNE L | Requisition Date\*: 07/15/2024  
 Organization: 1.20.ADM.CAP.1 | Phone: | Extension: | Target Place Date: 07/15/2024  
 Subcontractor Agreement |  Combine with Other Requisitions |  Requisition Printed | Date Entered: 07/15/2024  
 Buyer: TEST101 | ALDERMAN, DAVID A | Buyer Assignment Date: | Procurement Type: |

Sales Tax/VAT Total: 0.00 | Req Total: 1,100.00

Header Text | Header Approvals | Assign PO | Assign PO - Combined | Totals | Exchange Rates | Header Documents

**Requisition Lines** | New | Copy | Delete | Attach | Form | Query

Req Line*	Status	Line Type	Item	Item Rev	Misc Type	Description	Part Security	Requested Date*	Req U/M	Quantity	Inv Abbrev
1	Approved	G	GOODS			SIT2 Testing	N/A	07/20/2024	EA	10	N
2	Approved	P	00006613			Copper Adapter Comp 1/2 in. x 1/2 in.	Unrestricted	07/20/2024	EA	10	GBRM

Resources | Accounts | Line Charges | Line Text | Line Approvals | Line Documents | Currency Line

1. Query for the first requisition you would like to combine and check the Combine with Other Requisitions box.

Materials > Procurement Planning > Purchase Requisitions > Apply PO Info to Purchase Requisitions

**Purchase Requisitions** | New | Copy | Delete | Attach | 1 of 29 Existing | Table | Find | Query

Identification: Requisition ID: RQ-0000001 | Rev: 6 | Approval Process: SIT2 | Status: Approved | Submit for Approval:  | Trans Currency: CLP

Header | Accounting Defaults | Other Information | Notes | Assign PO Defaults | Subcontract Information

Assign PO Option: Assign Now | Vendor: E180474 | Address: | PO: | Release: |  
 Intracompany Vendor - None-Manual  
 Assign Now  
 Assign in PO Creation

Header Text | Header Approvals | Assign PO | Assign PO - Combined | Totals | Exchange Rates | Header Documents

**Requisition Lines** | New | Copy | Delete | Attach | Form | Query

Req Line*	Status	Line Type	Item	Item Rev	Misc Type	Description	Part Security	Requested Date*	Req U/M	Quantity	Inv Abbrev
1	Approved	G	GOODS			SIT2 Testing	N/A	07/20/2024	EA	10	N
2	Approved	P	00006613			Copper Adapter Comp 1/2 in. x 1/2 in.	Unrestricted	07/20/2024	EA	10	GBRM

Resources | Accounts | Line Charges | Line Text | Line Approvals | Line Documents | Currency Line

2. On the Assign PO Defaults tab, select Assign in PO Creation from the Assign PO Option dropdown.

Purchase Requisitions > Assign PO | New | Copy | Delete | Form | Query

Requisition ID: RQ-0000001

Req Line*	Ready For PO	Auto-Assign PO	Item	Item Rev	Description	Vendor*	Vendor Name	Vendor Address	Req Ln Pref Vendor	Purchase Order
1	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	GOODS		SIT2 Testing	E180474	A ESCOBAR DE LA TORRE			PO-0000022
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	00006613		Copper Adapter Comp 1/2 in. x 1/2 in.	E180474	A ESCOBAR DE LA TORRE		E180474	PO-0000022

Autoload | Assign PO IDs | Load Blanket PO Cost | Recalculate

Resources | Exchange Rates | Close

- Click the Assign PO sub task and click
- Save the record.

**Autoload**

Materials > Procurement Planning > Purchase Requisitions > Apply PO Info to Purchase Requisitions

**Purchase Requisitions** [New] [Copy] [Delete] [Attach] [2 of 10 Existing] [Table] [Find] [Query]

Identification  
 Requisition ID: RQ-0000018 Rev: 1 Approval Process: CAP01 Status: Approved [Submit for Approval] Trans Currency: CLP

Header | Accounting Defaults | Other Information | Notes | Assign PO Defaults | Subcontract Information

Requisitioner  
 Requisitioner\*: 8480264 | ANDERSON, DAPHNE L  
 Organization: 1.20.ADM.CAP.1 | Phone: | Extension: |  
 Subcontractor Agreement  Combine with Other Requisitions  Requisition Printed  
 Buyer: TEST101 | ALDERMAN, DAVID A

Requisition Date\*: 07/17/2024  
 Target Place Date: |  
 Date Entered: 07/17/2024  
 Buyer Assignment Date: 07/31/2024  
 Procurement Type: |

Sales Tax/VAT Total: 0.00 Req Total: 100.00

Header Text | Header Approvals | Assign PO | Assign PO - Combined | Totals | Exchange Rates | Header Documents

**Requisition Lines** [New] [Copy] [Delete] [Attach] [Form] [Query]

Req Line *	Status	Line Type	Item	Item Rev	Misc Type	Description	Part Security	Requested Date *	Req U/M	Quantity	Inv Abbrev	Taxable	Ship ID
1	Approved	S	SERVICES			SIT2 Testing	N/A	07/20/2024	HR	10		No	GB1

Resources | Accounts | Line Charges | Line Text | Line Approvals | Line Documents | Currency Line

- Query for the next requisition to be combined and check the Combine with Other Requisitions box.
- Repeat steps 2-4.
- Save the record.

When the scheduled job Create Purchase Orders runs, it will convert both requisitions to a single PO.