

## Re-creating Fiscal Year 2016 Purchase Orders:

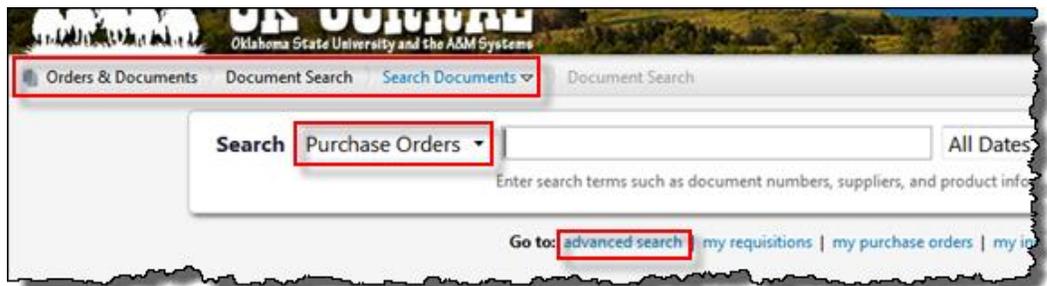
- A majority of previously submitted FY2016 PO's can be re-created by copying the associated requisition to a new cart.
- The new cart will need to be submitted with the following modifications:
  - The previous PO # (i.e. "E137248") should be used as the cart name.
  - The "**PO Distribution Bypass**" option *MUST BE SELECTED* on the new Cart/Requisition
  - Campus Code must be selected
  - New Banner Accounting Codes must be populated.
- Due to Supplier requirements, it's likely that requisitions that contain **Punch-out items** **cannot** be copied and re-submitted. These orders will have to be recreated by re-visiting the Punch-out and submitting a new cart.

1

Via Document Search, locate your FY2016 Purchase Orders to be re-created.

**Note:** *Punch-out Suppliers do not allow orders to be "copied". Any FY2016 PO with Punch-out Items must be recreated by visiting the Punch-out and submitting a new cart.*

Navigate to the  
"advanced search" for  
Purchase Orders



From the PO Advanced Search Screen:

- A. Select yourself as the **Owner**
- B. Select an **“AP Status”** of **Closed**
- C. Select the **Fiscal Year 16 (2016)**

Go to: [simple search](#) | [my requisitions](#) | [my purchase orders](#) | [my invoices](#)

**Search** Purchase Orders ▾ simple search

**Go**

**Purchase Order Identification**  
Purchase Order Number(s)

**Purchase Order Information**

Participant(s)

**A** Owner  Your Name

Prepared By

Approved By

Date

Creation Date (System) ▾ All Dates ▾

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No Matches

**AP Status**

Open  Soft Closed **B**  **Closed**

**Status Flags**

With User Revisions  With System Revisions  
 With Rejected Lines  With Errors  
 With Cancellation  With Backorders  
 With Supplier Modifications  With Attachments  
 Requires Receipts  With Credits  
 With Substituted Invoice Items  With Forced Matches  
 With Returns  With Cancelled Receipt Items

**Custom Fields**

Account String  Is Exactly ▾  [Add another Account String](#)  
[Select from all values...](#)

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Contract #  Is Exactly ▾  [Add another Contract #](#)

Cost Match Invoices Only?  Is Exactly ▾

**C** **Fiscal Year**  Is Exactly ▾ **16** [Add another Fiscal Year](#)  
[Select from all values...](#)

Phase #  Is Exactly ▾  [Add another Phase #](#)

PO Type  Is Exactly ▾  [Add another PO Type](#)  
[Select from all values...](#)

Purchasing Contact  Is Exactly ▾  [Add another Purchasing Contact](#)

Work Order #  Is Exactly ▾  [Add another Work Order #](#)

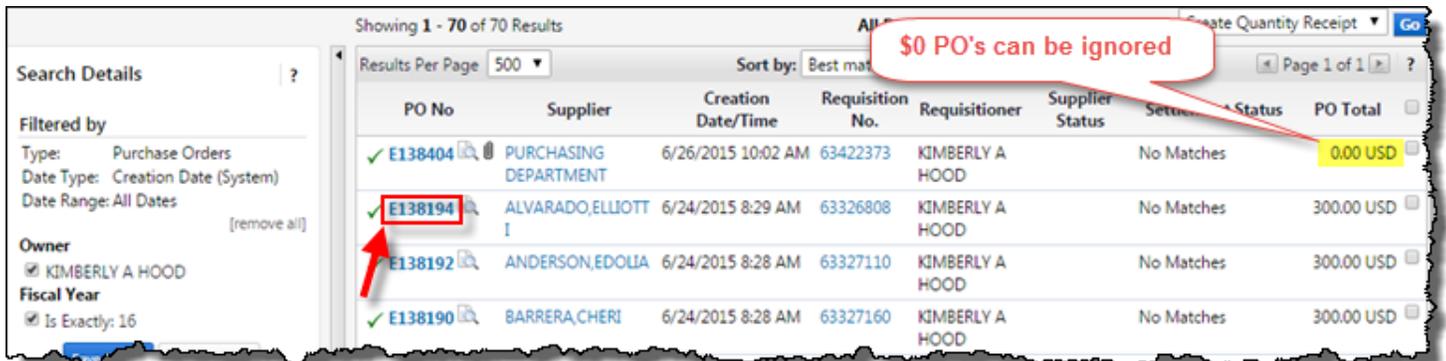
**Go**

2

From the search results, select the first Purchase Order to be re-created.  
Select the PO Number to open the document

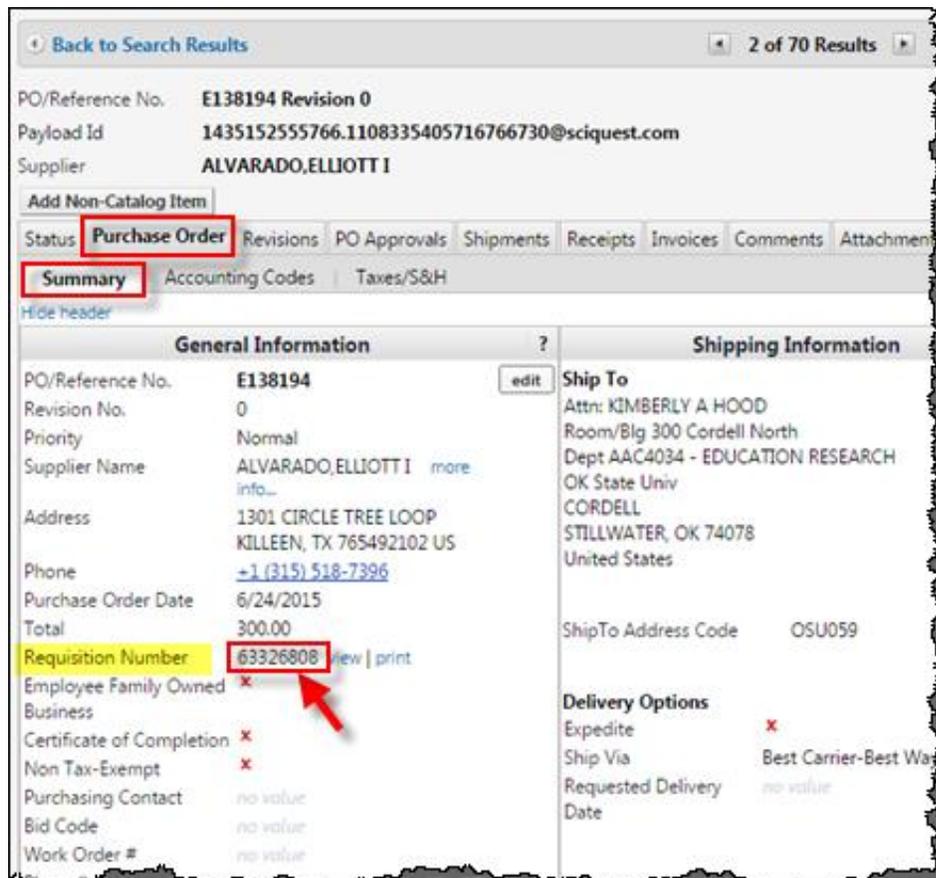
**Notes:**

- \$0 PO's can be ignored
- Remember or "copy" the old "E" PO number (it will need to be populated in the new cart)



3

From within the PO document, navigate to the "Summary" Tab and select the associated Requisition Number to navigate to the PR



4

A. From within the Requisition Document, select **“Copy to New Cart”** from the upper/right pulldown

The screenshot shows a web interface for a Requisition Document. At the top right, there is a dropdown menu titled 'Available Actions' with the following options: 'Copy to New Cart', 'Add Comment', 'Add Notes to History', and 'Copy to New Cart'. The 'Copy to New Cart' option is highlighted with a red box and a yellow callout bubble labeled 'A'. Below the dropdown, there are tabs for 'Summary', 'Shipping', 'Billing', 'Accounting Codes', 'Internal Notes and Attachments', 'Supplier Info', and 'Taxes/S&H'. The 'Summary' tab is active, showing a table with columns for 'General', 'Shipping', and 'Billing'. The 'General' column shows 'Status: Completed (6/24/2015 8:29 AM)', 'Submitted: 6/19/2015 10:50 AM', 'Cart Name: Alvarado EPDI Stipend 2015', 'Description: no value', 'Purchase Order: E138194', and 'Requester: KIMBERLY A HOOD'. The 'Shipping' column shows 'Ship To: Attn: KIMBERLY A HOOD, Room/Blg 300 Cordell North, Dept AAC4034 - EDUCATION RESEARCH, OK State Univ, CORDELL, STILLWATER, OK 74078, United States'. The 'Billing' column shows 'Bill To: Oklahoma State University, University Accounting, 405-744-5865, 304 Whitehurst, Stillwater, OK 74078, United States'.

5

From within the new Cart:

A. Rename the cart, **with the old or prior “E” PO Number** that is being re-created.

B. Select: **“Proceed to Checkout”**

The screenshot shows a web interface for a Shopping Cart. At the top, there is a breadcrumb trail: 'Shop / My Carts and Orders / Open My Active Shopping Cart / Cart - Draft Requisition'. Below this, there is a shopping cart icon and the text 'Shopping Cart for KIMBERLY A HOOD'. On the right, there is a 'Continue Shopping' link and a summary box showing '1 Item(s) for a estimated tax, shipping'. In the center, there is a text input field labeled 'Name this cart:' with the value 'E138194' entered. This field is highlighted with a red box and a yellow callout bubble labeled 'A'. To the right of the input field, there is a blue button labeled 'Proceed to Checkout', which is also highlighted with a red box and a yellow callout bubble labeled 'B'. At the bottom, there is a 'Have you made changes?' section with an 'Update' button and other links like 'Help', 'Add Non-Catalog Item', and 'Perform action on (0) items selected'.

6

- A. Navigate to the “General” section.
- B. Select a “Campus Code” from one of the new values (if you are unable to select a campus code, complete all other steps and assign the cart to another requestor in your department. Include a note requesting they enter the campus code before submitting the requisition)
- C. SELECT “PO Distribution Bypass”

**Note:** If you choose to not BYPASS distribution, please be aware the new PO may be re-distributed to the Supplier. If you do not check the box please notify the supplier so that your order is not duplicated.



**General**

These values apply to all lines unless specified

Cart Name	E138194
Description	
Requester	KIMBERLY A HOOD
Priority	Normal
Shopper	KIMBERLY A HOOD
Employee Family Owned Business	<input type="checkbox"/>
Certificate of Completion	<input type="checkbox"/>
Non Tax-Exempt	<input type="checkbox"/>
Purchasing Contact	
Contract #	
Bid Code	
Campus Code	9
Board Approval	
Cost Match Invoices Only?	
PO Distribution Bypass	<input checked="" type="checkbox"/>

**Campus Code**

- 1 - General University
- 2 - Agricultural Experiment
- 3 - Agricultural Extension
- 4 - Institute of Technology
- 5 - Veterinary Medicine
- 6 - Oklahoma City
- 7 - Center for Health Sciences
- 8 - Tulsa
- 9 - CIED
- C - Connors State College
- L - Langston University
- M - Medical Authority
- N - NEO
- P - Panhandle State

7

- A. Navigate to the "Accounting Codes" section.
- B. Select a set of "Accounting Codes" for each new value
- C. If needed, "Accounting Codes" can be varied by individual line item.

General Shipping **A** Accounting Codes Internal Notes and Attachments PO Clauses Final Review Assign Cart

Go to Express Checkout Return to shopping cart Continue Shopping

**Almost ready to go! The list below needs to be addressed before the request can be submitted.**

- Required field: Account
- Required field: Chart
- Required field: Commodity
- Required field: Fund

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing **Accounting Codes** Internal Notes and Attachments Supplier Info Taxes/S&H

Accounting Codes ?

These values apply to all lines unless specified by line item

Chart	Fund	Commodity	Account
no value Required field	no value Required field	no value Required field	no value Required field

edit

For selected line items Add To Favorites Go

ALVARADO,ELLIOTT I more info...

Product Description	Catalog No	Size / Packaging	Unit Price	Quantity	Ext. Price
1 Stipend for EPDI Workshop participants, July 6-July 24, 2015. more info... Accounting Codes (same as header)	NA	EA	300.00	1 EA	300.00 USD

Supplier subtotal 300.00

**C** edit

8

- A. Navigate to the “**Final Review**” section.
- B. Select “**Assign Cart**” and assign the cart to Leigh James, Matt Wessel, Kim Trunk, Joe Teel, or Scott Schlotthauer. For OSU-Tulsa and CHS, please assign your cart to Brandi Brown. Since legacy POs have already been approved, assigning your cart to one of the following users will allow you to bypass the approval process.

