
EP.020.610 – CREATING AND USING PERSONAL REQUISITION TEMPLATES

Purpose	To create and use personal requisition templates.
Description	<p>Templates, which consist of sets of items that are frequently ordered together, are used during order entry to add items to a requisition. While the Favorites list is used for storing single items, Templates are used for storing sets of items. Templates may contain items from the Favorites list or new items.</p> <p>After a Template has been added to a requisition, users can change the quantity of any item, delete items, or add additional items to a requisition. Personal Templates are private and accessible only to the user who creates them.</p> <p>Templates can be shared with other roles and users.</p>
Security Role	BOR_EP_MAINT_REQ
Dependencies/ Constraints	None
Additional Information	Templates can only be created from or applied to special request requisitions.

Procedure

Below are step-by-step instructions on how to create a new template.

Step	Action
1.	Click the NavBar icon.
2.	Click the Menu icon.
3.	Click the eProcurement link.
4.	Click the Create Requisitions link.
5.	Click the Templates link.
6.	Click the Manage Personal Templates link.
7.	Enter the Template Name and Description .
8.	To share the template with additional users, check the Allow Sharing checkbox.
9.	Click the Share Details link and click OK once finished. <i>Note: On this page, users can select the Share with All Roles and Requesters checkbox or can specify specific Role Names and/or User IDs.</i>
10.	Click OK .
11.	Click the NavBar icon.
12.	Click the Navigator icon.
13.	Click the eProcurement link.
14.	Click the Requisition link.
15.	Click the Templates link.
16.	Click the Manage Personal Templates link.
17.	Enter the Template Name and Description .

Procedure

Below are step-by-step instructions on how to add an item to a template.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the eProcurement link.
4.	Click the Requisition link.
5.	Click the Special Requests link.

Step	Action
6.	Enter the item description in the Item Description field.
7.	Enter the price in the Price field.
8.	Enter the quantity in the Quantity field.
9.	Enter the category code in the Category field or click on the search button to search for the code.
10.	Enter the unit of measure in the Unit of Measure field or use the search button to search for the correct Unit of Measure.
11.	If known, enter the Supplier ID in the Supplier ID field or use the search button to search for the supplier.
12.	Click the Add to Cart button.
13.	Enter as many items as desired using Steps 6 - 12.
14.	Click the Checkout button.
15.	Once the requisition has been reviewed and updates/changes are complete, the requisition is ready to be saved as a template.
16.	Select the checkbox next to the line items to add these items to the template. To add all of the items on the requisition, click the Select All / Deselect All link at the bottom of the list.
17.	Click the Add to Template(s) link.
18.	Select the Template . If there are no existing templates set up, use the Add a new template section to enter the Template Name and Description .
19.	Click the Save & Submit button to submit the requisition into workflow.

Procedure

Below are step-by-step instructions on how to add items from a Favorites list to a template.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the eProcurement link.
4.	Click the Requisition link.
5.	Click the Favorites link.
6.	Select the items to add to the Template.
7.	Click Add to Template(s) link.

Step	Action
8.	Select the Template . If there are no existing templates set up, use the Add a new template section to enter the Template Name and Description .

Procedure

Below are step-by-step instructions on how to use an existing template to add items to a special request requisition.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the eProcurement link.
4.	Click the Requisition link.
5.	Click the Templates link.
6.	Enter the desired Quantity .
7.	Click Add .
8.	Click Checkout .
9.	Once the requisition has been reviewed and updates/changes are complete, the requisition is ready to be submitted. Click the Save & Submit button.

Procedure

Below are step-by-step instructions on how to delete a template.

Step	Action
1.	Click the NavBar icon.
2.	Click the Navigator icon.
3.	Click the eProcurement link.
4.	Click the Requisition link.
5.	Click the Templates link.
6.	Click the Manage Personal Templates link.
7.	Click the Delete Row (-) button.
8.	Click OK to confirm delete template.
9.	Click OK .