EP.020.610 – CREATING AND USING PERSONAL REQUISITION TEMPLATES

Purpose	To create and use personal requisition templates.
Description	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. 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. Templates can be shared with other roles and users.
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. ***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.*
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.**