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PURCHASING USER MANUAL

CREATE AND USE A REQUISITION TEMPLATE

INTRODUCTION

A requisition template can be created in order to reuse the line items and fiscal coding on future requisitions. A new requisition made from a template can then be added to or modified as needed to complete for purchasing.

A template can be created either from an existing requisition or requisition that you have just saved, or a template can be created on its own to be used later for a new requisition. The important distinction is that a requisition saved as a template must first be saved as a requisition; therefore you will have both a requisition and a template. Be aware of this if you intend to create only a template.

CREATE A NEW TEMPLATE

1. Click the **Status** tab.
2. Check the **Template** check box.
3. Click **Find**.
4. Click the **Template** tab.

Figure 1 - Template tab

The screenshot shows a web interface with four tabs: Status, Template (selected), Approval, and Report. The Template tab contains the following elements: a 'Template' text field with '513' in the 'Tracking #' field; a 'Need by' date field set to '10/29/2008' and an 'All or Nothing' checkbox; a 'Desc' text field; a 'Make Requisition' button; and a 'Status' field set to 'Template'. At the bottom, there are fields for 'Requested by' and 'Edited by'. Buttons for 'New Template', 'Save', and 'Print Preview' are also visible.

5. Enter a name for the template in the **Template** field.
6. If desired, select a **Need By** date.
7. Enter a **Description**. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****.
8. Click **Save**. NOTE: A department, if used by your agency, is not required (or available) when creating a “stand alone” template. The department will be selected when the requisition is made from the template.

9. Click **Add Item**. Add the **Description**, **Qty**, **Price**, etc as would for a requisition. Add as many line items as needed. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****, in the **Description** field. See the [Creating a Requisition](#) document for details.
10. If desired, click **Vendor Info** to add a vendor name and address as you would for a requisition.
11. If desired, click **Coding Info** to add fiscal coding as you would a requisition.
12. Click **Save** to save the template.

Figure 2 - Add line items to template

Notes	Atch	Status	Item #	Description	IC*	R	Ref Doc*	Sfx	BFY	Mod	Index*	PCA	ExpSub*	Dtl	RevSub*	Dtl	Gran
			56165	Office Updated	230				2009		1004	04000	5101				SAF

CREATE A TEMPLATE FROM A REQUISITION

1. Click the **Requisition** tab.
2. Enter the Requisition as you normally would. See the [Creating a Requisition](#) document for details. (You can complete as much of the requisition as desired, including vendor information and coding information.)
3. When finished with the requisition, click **Make Template**.

Figure 3 - Make Template

Notes	Atch	Status	Item #	Description	Qty	U/M*	Price	SubTotal	Workflow
		Awaiting Fiscal Coding	5654651	Elec Components	85	Each	6.00	510.00	Admin

4. The **Requisitions** tab changes to the **Template** tab. You can make more changes or additions to the template as needed. For example, you may want to change the

Description since it is probably something unique to the requisition that you have saved; however, do not use special characters or symbols, including &, ', “, <, and \ in the **Description** field. Otherwise your template will be saved with the same description as the requisition.

5. Click **Save** to save the template.
6. To finish with the requisition, select it from the **Status** screen.

CREATE A REQUISITION FROM A TEMPLATE

1. Select **Requisitions**.
2. Click the **Status** tab.
3. Check the **Template** check box.
4. Click **Find**.

Figure 4 - Template check box on the Status screen

The screenshot shows the 'Status' tab selected in a navigation bar. Below the navigation bar are search filters for 'Req #', 'Tracking #', and 'Status' (set to 'Active or recently received'). There is a 'Find' button. Below these are 'Request Date Range' filters and a 'Request Date Range' dropdown set to 'All Requisitions'. A 'Templates' checkbox is checked and circled in red. There is also a 'My Requisitions' checkbox and a 'Departments' dropdown set to '~My Departments~'. A 'Reset' button is also present. At the bottom, a table shows a requisition with 'Trk # 512', 'Req # BLT08001', 'Requester JAMES CARTER', 'Req'd Date 10/22/2008', 'Description Electrical Components', and 'Status Template'.

5. Locate the template to use and click **Edit**.
6. Click **Make Requisition**.

Figure 5 - Make Requisition

The screenshot shows the 'Make Requisition' screen. The 'Template' tab is selected. Fields include 'Department WRD: Word Processing', 'Template BLT08001', and 'Tracking # 512'. There are buttons for 'New Template', 'Save', and 'Print Preview'. The 'Need by' date is 10/29/2008. The 'Desc' field contains 'Electrical Components'. The 'Status' is 'Template'. There are buttons for 'Make Requisition' (circled in red), 'Delete Template', and 'Add Item'. A table at the bottom shows a total of \$240.00 and a list of items with columns for 'Notes', 'Atch', 'Status', 'Item #', 'Description', 'Qty', 'U/M', 'Price', and 'SubTotal WorkFlow'. The first item is 'Elec Components' with a quantity of 40 and a price of 6.00.

7. If using a template that was created in a prior fiscal year, verify all of the fiscal code fields in the new requisition – e.g., **Grant** and **Grant Phase**, **Project** and **Project Phase** – in case the PCA/Index used on the template looks up prior year fiscal codes.

8. Enter (or change) the **Description** and make any necessary changes to the itemized list or add additional items. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****, in the **Description** field.
9. If desired, click **Vendor Info** to add or change a vendor name and address.
10. If desired, click **Coding Info** to add or change the fiscal coding.
11. Click **Itemize Complete** (this will save the requisition and make it ready for approval) or click **Save** if you want to save the requisition and add to or change it later.