PURCHASING USER MANUAL

CREATE AND USE A REQUISITION TEMPLATE

INTRODUCTION

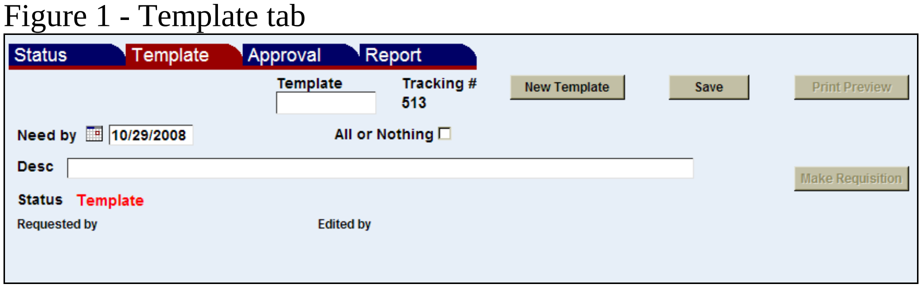
A requisition template can be created in order to reuse the line items and fiscal coding on future requisitions. A new requisition made from a template can then be added to or modified as needed to complete for purchasing.

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.

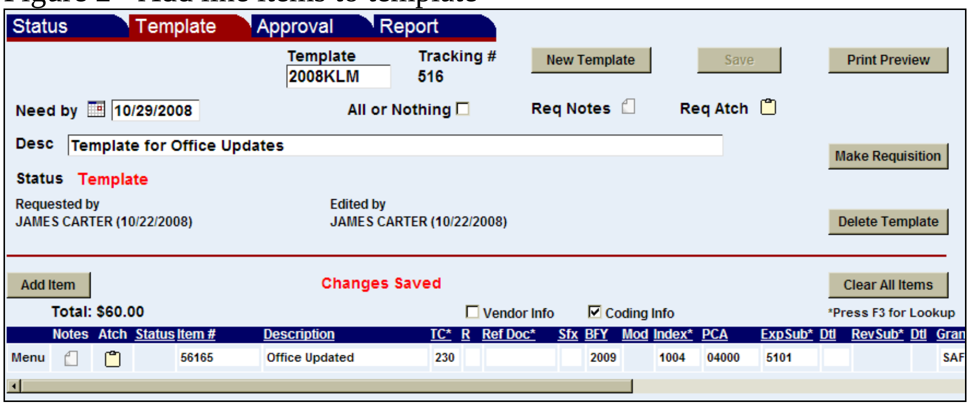
Figure 1 - Template tab



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.

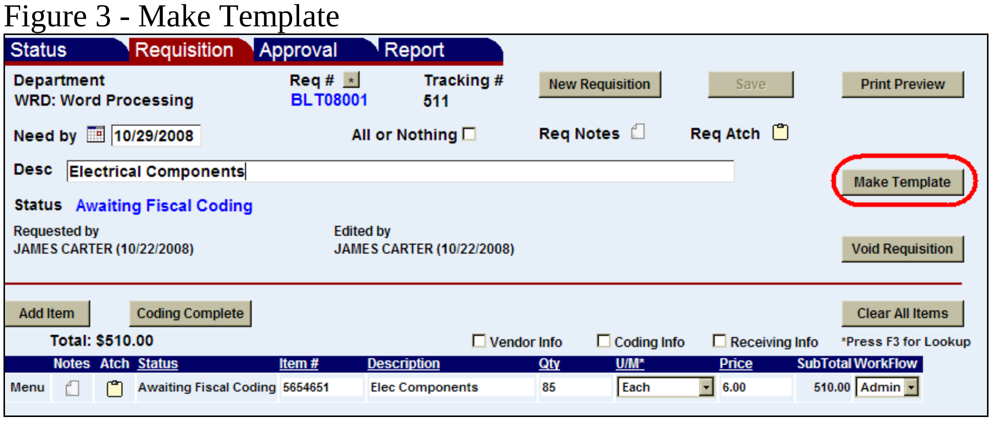
Figure 2 - Add line items to template



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



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

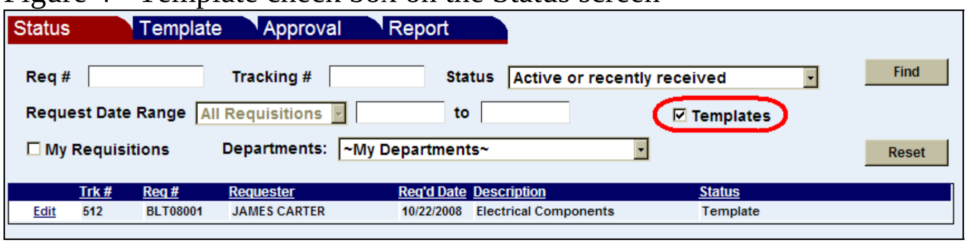
Description since it is probably something unique to the requisition that you have saved; however, do not use special characters or symbols, including **&**, ', **"**, <, and \ in the **Description** field. Otherwise your template will be saved with the same description as the requisition.

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

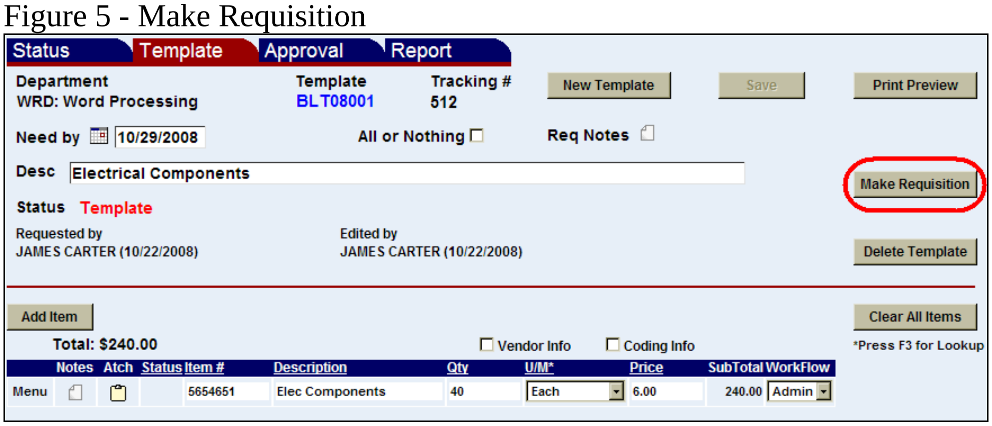
1. Select **Requisitions**.
2. Click the **Status** tab.
3. Check the **Template** check box.
4. Click **Find**.

Figure 4 - Template check box on the Status screen



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

Figure 5 - Make Requisition



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.