

Using Templates in eProcurement Special Request Requisitions Updated March 2007

When creating a Special Request requisition for frequently ordered items, the end-user can choose to save the requisition as a “template” for future use. Note – templates should not be used for catalog or “punchout” web requisitions.

To Create a Template:

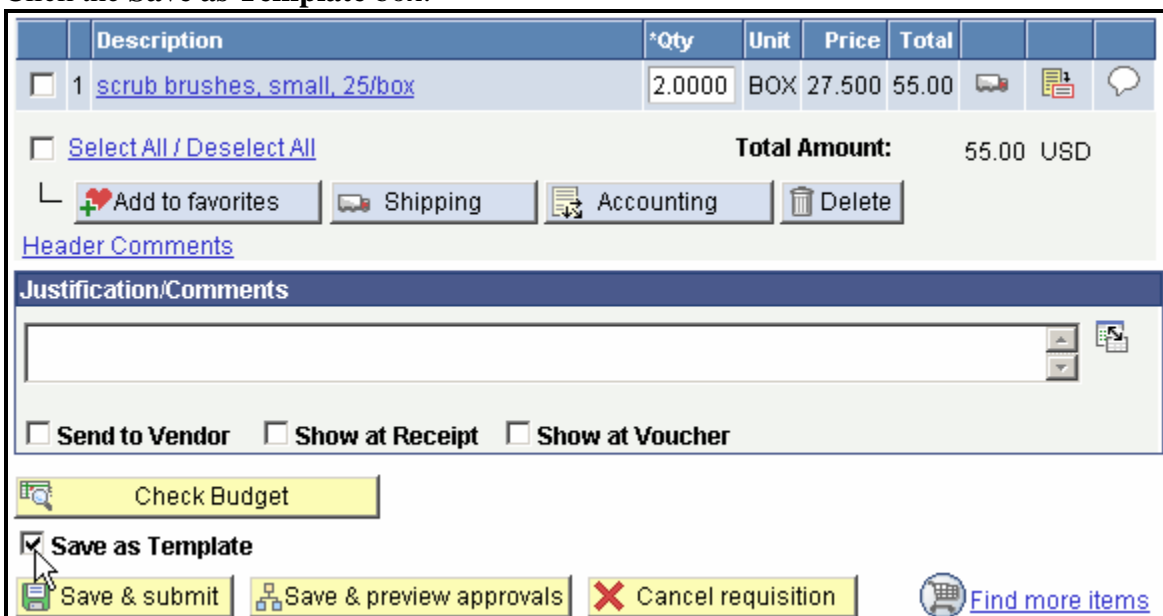
After all line items have been added to the requisition, click the **Review and Submit** hyperlink.



Optionally, in the **Requisition Name** box, enter a description that will enable you to easily identify this template for future use.



Click the **Save as Template** box:



Save the requisition as appropriate by clicking Check Budget, Save & Submit, or Save & Preview Approvals.

To Create a New Requisition Using a Saved Template:

Pathway: eProcurement > Create Requisition > Find Items > Templates

The screenshot shows the 'Create Requisition' page with a navigation bar containing: Settings, Find Items, Modify Shipping, Modify Accounting, and Review and Submit. Below the navigation bar is a search field with a 'Search' button. A tabbed interface includes 'Catalog', 'Favorites', 'Templates', 'Forms', 'Web', and 'Special Request'. The 'Templates' tab is active, displaying a table with two rows:

Request Type	Description
Special Request - Goods	Order goods not available in item catalogs
Special Request - Services	Fixed Cost Services

Click the **Add** button next to the appropriate Template.

This screenshot shows the 'Create Requisition' page with the 'Templates' tab selected. The table below the tabs lists items with an 'Add' button for each:

Description	Quantity	
Scrub Brushes	<input type="text"/>	
0000000001	<input type="text"/>	

Click the **Review and Submit** hyperlink.

The screenshot shows the 'Create Requisition' page with the 'Review and Submit' button in the navigation bar highlighted by a mouse cursor. The 'Find Items' button in the navigation bar has a checkmark, indicating it is the current step.

Make changes to the new requisition as appropriate (quantity, add/delete items, funding, etc.)

The screenshot shows the 'Create Requisition' page with the 'Review and Submit' button highlighted. Below the navigation bar, there are fields for 'Requisition Name', '*Requester' (bmclaren), '*Origin' (DEP), and 'Priority' (Medium). A 'Requisition Summary' table is displayed:

Requisition Summary						View All	First	1 of 1	Last
	Description	*Qty	Unit	Price	Total				
<input type="checkbox"/>	1 scrub brushes, small, 25/box	2.0000	BOX	27.500	55.00				

Below the table, there is a 'Select All / Deselect All' checkbox, a 'Total Amount: 55.00 USD' label, and a row of buttons: 'Add to favorites', 'Shipping', 'Accounting', and 'Delete'.

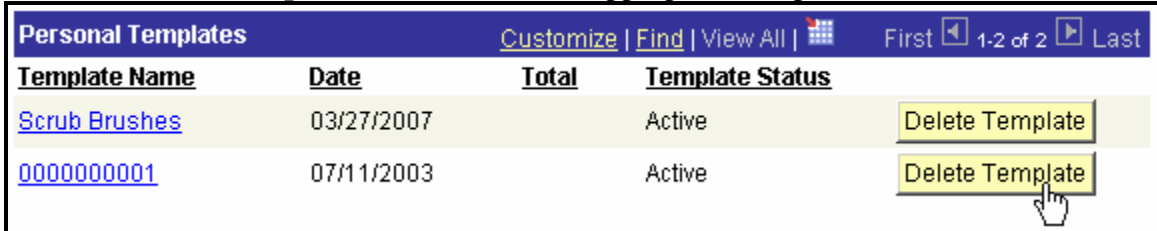
To Delete Existing Templates:

Pathway: eProcurement > My Profile

Click the **Manage My Request Templates** hyperlink.

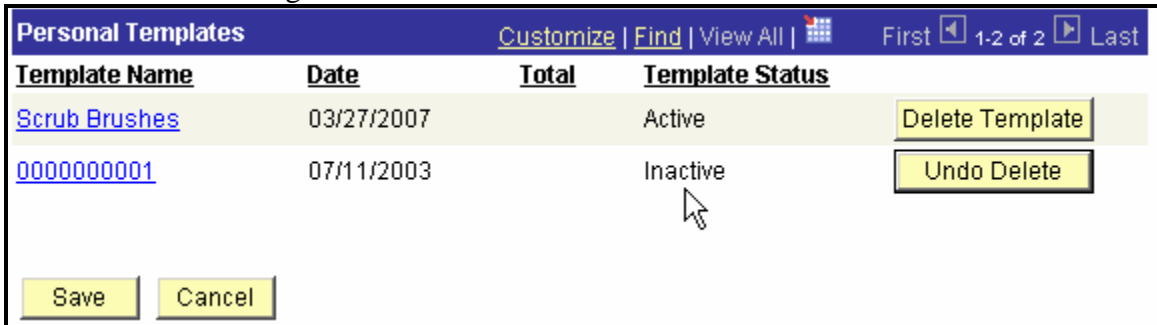


Click the **Delete Template** button next to the appropriate template to be deleted.



Template Name	Date	Total	Template Status	
Scrub Brushes	03/27/2007		Active	Delete Template
0000000001	07/11/2003		Active	Delete Template

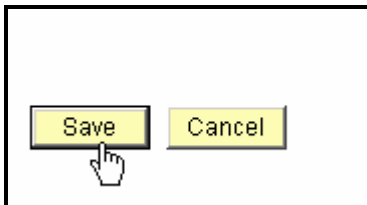
Notice the status changed to Inactive.



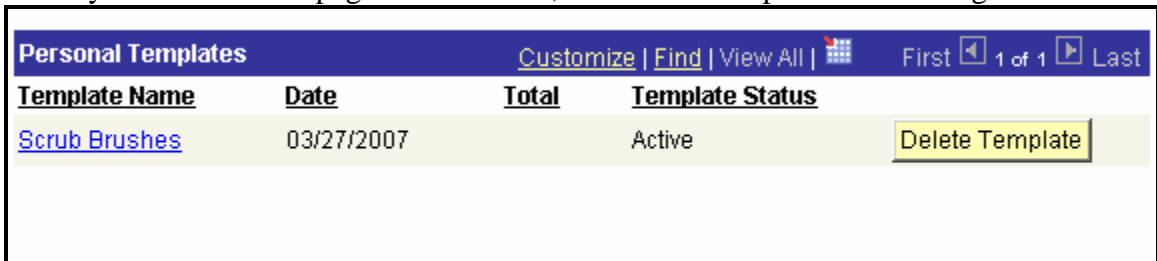
Template Name	Date	Total	Template Status	
Scrub Brushes	03/27/2007		Active	Delete Template
0000000001	07/11/2003		Inactive	Undo Delete

Save Cancel

Click **Save** to confirm.



When you return to this page the next time, the deleted template will no longer be visible.



Template Name	Date	Total	Template Status	
Scrub Brushes	03/27/2007		Active	Delete Template