Quick Guide – How to Copy a Requisition or Make a Template

This guide covers how to:

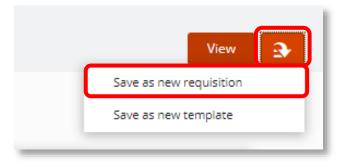
- <u>Copy an existing requisition</u>
- Make a requisition template
- Edit or delete a template

Copy an Existing Requisition

- 1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.
- 2. Find an existing requisition you wish to copy. If necessary, remove the filter showing only draft unfinished requisitions to view your completed and cancelled items:
 - Click the filter icon
 - Select 'Clear all'
 - Click to filter icon again to close it.

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3. Click on the selected requisition to highlight it, then click the orange drop-down menu top right and select 'Save as new requisition':



4. A new requisition with all the details of the existing one is now ready to use. The existing detail can be edited or deleted or further lines can be added:

Submit for Approval				
Requisition (RO Control of Contro				
Requested Items 3 items	Requested Ite			
Dissection Summary 2 dissections		50 ml test tubes		GOODS GBP 5.40 4.50 (Ex)
UOE purchasing location Required 26-Aug-2019		Quantity 10.000000 REQUIRED 26-AUG-2019	Unit Amount (Inclusive) 0.540000	4,30 (EX) ONLY I≣ 1 DISSECTION
Addresses Box 1 Finance Northcote House University of Exeter Exeter EX4 4QJ United Kingdom		PURCHASE Safety visor	Unit Amount (Inclusive)	Edit Create duplicate Delete Delete ONLY ONLY
Authorisation History 2 items		3.000000 REQUIRED 26-AUG-2019 PURCHASE	2.390000	

Make a Requisition Template

- 1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.
- 2. Find an existing requisition you wish to copy. If necessary, remove the filter showing only draft unfinished requisitions to view your completed and cancelled items:
 - Click the filter icon
 - Select 'Clear all'
 - Click to filter icon again to close it.

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3. Click on the selected requisition to highlight it, then click the orange drop-down menu (top right) and select 'Save as new template:

View	
Save as new requisition	
Save as new template	٦

4. Give the template a name:

Template Name	
Template Name *	40
OK Cancel	

5. The existing lines on the template can be edited or deleted and further lines can be added:

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Requested Items 3 items	Requested Ite			+ Add []"
Dissection Summary 2 dissections		50 ml test tubes		GOODS GBP 5.40 4.50 (Ex)
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Addresses Box 1 Finance Northcote House University of Exeter Exeter EX4 4QJ United Kingdom		Safety visor		Edit 🕤
Authorisation History 2 items		Quantity 3.000000 REQUIRED 26-AUG-2019 PURCHASE	Unit Amount (Inclusive) 2.390000	ONLY I DISSECTION Edit ⊋

- 6. 'Save' any changes.
- 7. To create new requisitions using this template, go to the front page of 'My Requisitions'. Click on the 'Templates' tab, select the relevant template and click the 'Create from Template' button:

Search		- "C	Add +	Main Purch System 🖨
Requisitions Requisition Lines	Templates	.	Lab1 monthly repeat order	Create from template
	y repeat order ested 23-Aug-2019 by Alison Ball	GBP 36.51 30.43 (Ex) E 3 LINES	🖹 Summary 💾 Details	
			REQUISITION	UNAPPROVED

8. A new requisition is now opened and can be edited or changed as needed. Once ready, select 'Submit for Approval' to start the approval process to create the purchase order.

Edit or Delete a Requisition Template

- 1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.
- 2. Select the 'Templates' tab and click on the relevant template to highlight it.
- 3. To edit the template, the click the orange drop-down and select 'Edit':

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Requisitions	Requisition Lines Templates	a	Lab1 monthly repeat order	Create from template
	Lab1 monthly repeat order R0104473 Requested 23-Aug-2019 by Allson Ball	GBP 36.51 30.43 (Ex) E 3 LINES	🖹 Summary 🛗 Details	Edit

4. The template now opens and any of the existing detail can be changed or deleted or new lines can be added:

Submit for Approval				
Requisition (R0 (Templat 3 items, Total (Exclusive) GBP 30.43	te) 🚓 <			
Requested Items 3 items	Requested Iten	กร		+ Add []"
Dissection Summary 2 dissections		50 ml test tubes		GOODS GBP 5.40 4.50 (Ex)
UOE purchasing location Required 26-Aug-2019		Quantity 10.000000 REQUIRED 26-AUG-2019	Unit Amount (Inclusive) 0.540000	ONLY
Addresses Box 1 Finance Northcote House University of Exeter Exeter EX4 4QJ United Kingdom		Safety visor Commence I Quantity 3,00000	Unit Amount (Inclusive) 2.390000	Edit Create duplicate Delete ONLY
Authorisation History 2 items		BUICHASE	5.220000	Edit

5. 'Save' any changes.

6. To delete the template, select the 'Cancel Requisition' option from the orange drop-down menu:



Help and Support

For any queries about requisitions, please contact the Finance Helpdesk on <u>financehelpdesk@exeter.ac.uk</u>