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

This guide covers how to:

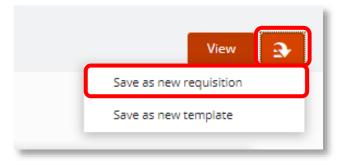
- <u>Copy an existing requisition</u>
- Make a requisition template
- Edit or delete a template

### 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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Filter	Clear all George B documents.
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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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Filter	Clear all Ger
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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:

Requisition (RO (Complete Strength Requisition (RO (Complete Strength Republic Stren	late) 🖈 <			
Requested Items 3 items	Requested Ite			+ Add []"
Dissection Summary 2 dissections		50 ml test tubes		GOODS GBP 5.40 4.50 (Ex)
Settings UOE purchasing location Required 26-Aug-2019		Quantity 10.000000	Unit Amount (Inclusive) 0.540000	ONLY
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	<b>.</b>	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':

Dearch		- ,C	Add +	Main Purch System 🖨
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>