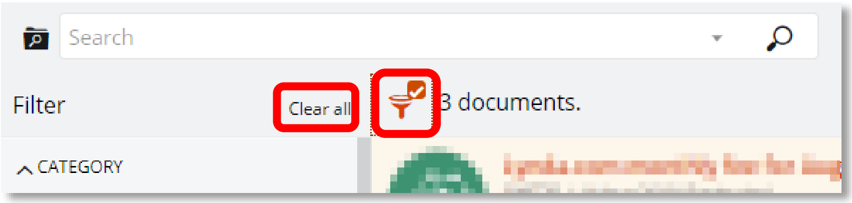
Quick Guide – How to Copy a Requisition or Make a Template

This guide covers how to:

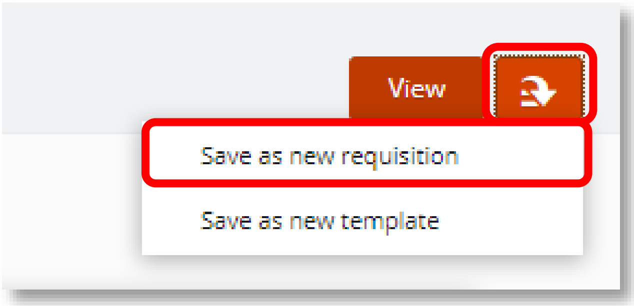
- Copy an existing requisition
- Make a requisition template
- Edit or delete a template

Copy an Existing Requisition

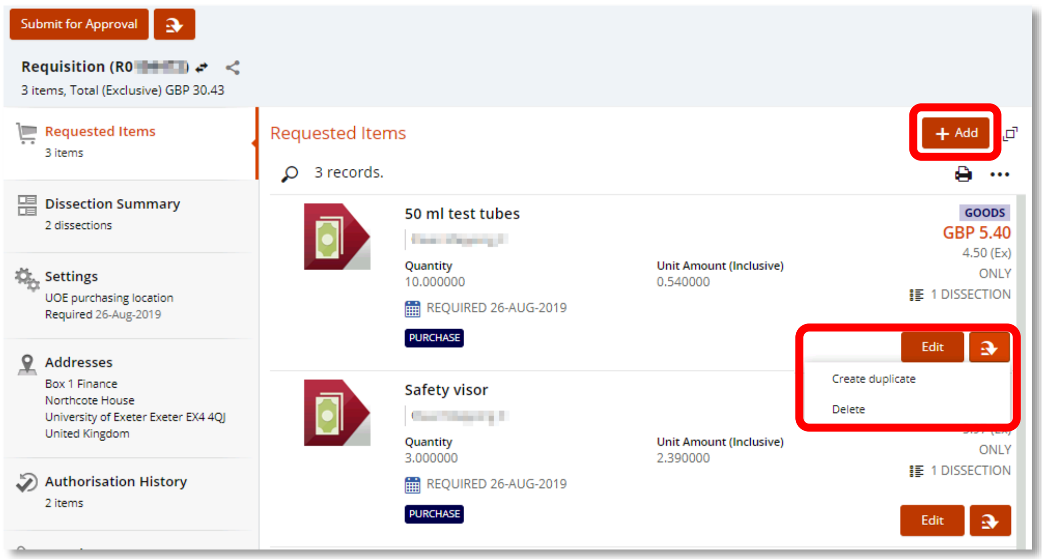
1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.
2. Find an existing requisition you wish to copy. If necessary, remove the filter showing only draft unfinished requisitions to view your completed and cancelled items:
   - Click the filter icon
   - Select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



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

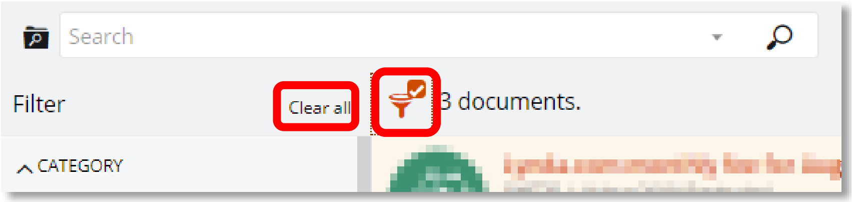


4. A new requisition with all the details of the existing one is now ready to use. The existing detail can be edited or deleted or further lines can be added:

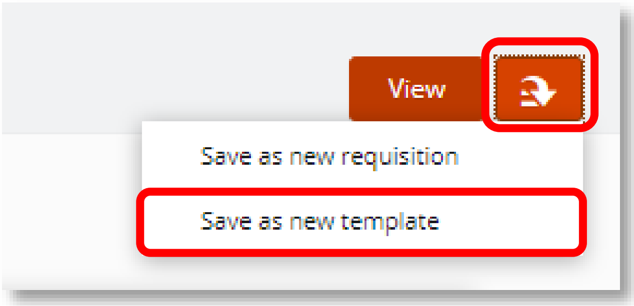


Make a Requisition Template

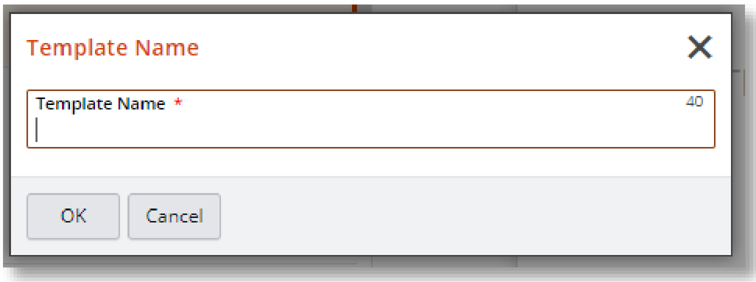
1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.
2. Find an existing requisition you wish to copy. If necessary, remove the filter showing only draft unfinished requisitions to view your completed and cancelled items:
   - Click the filter icon
   - Select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



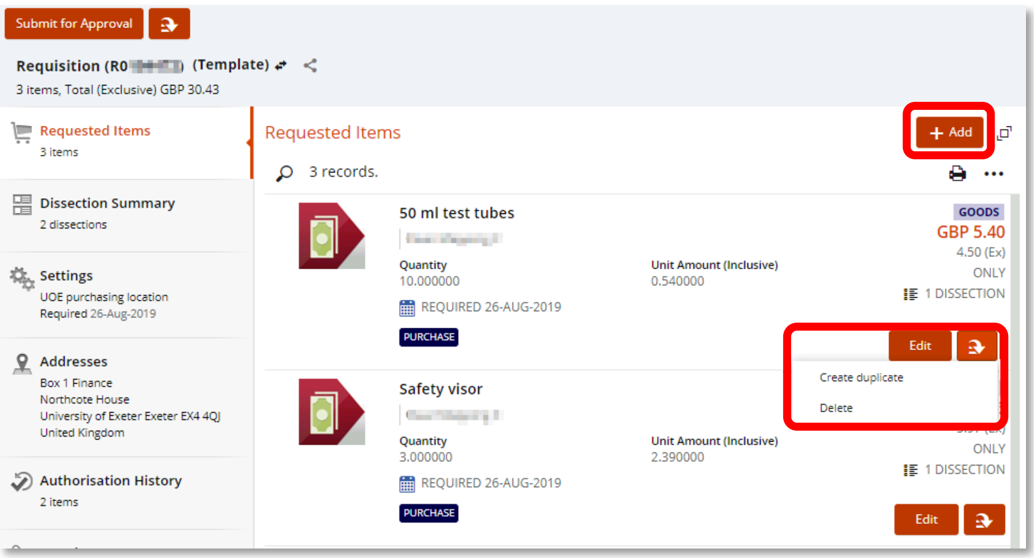
3. Click on the selected requisition to highlight it, then click the orange drop-down menu (top right) and select 'Save as new template':



4. Give the template a name:

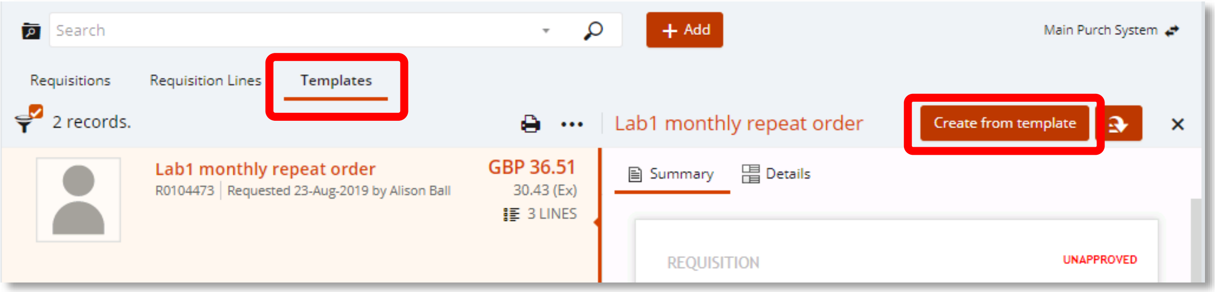


5. The existing lines on the template can be edited or deleted and further lines can be added:



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:



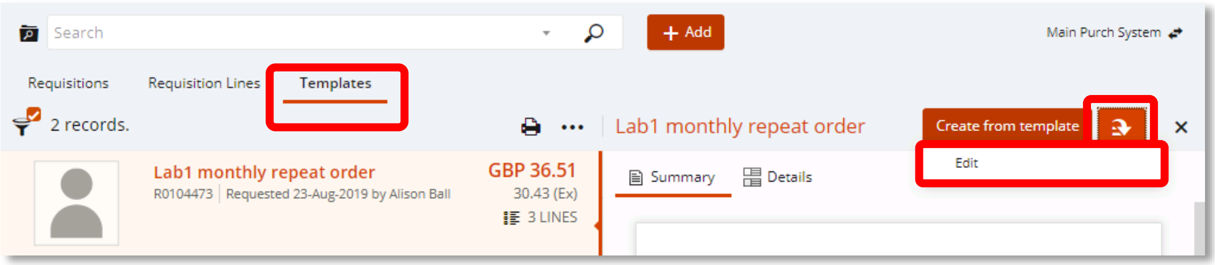
8. A new requisition is now opened and can be edited or changed as needed. Once ready, select 'Submit for Approval' to start the approval process to create the purchase order.

Edit or Delete a Requisition Template

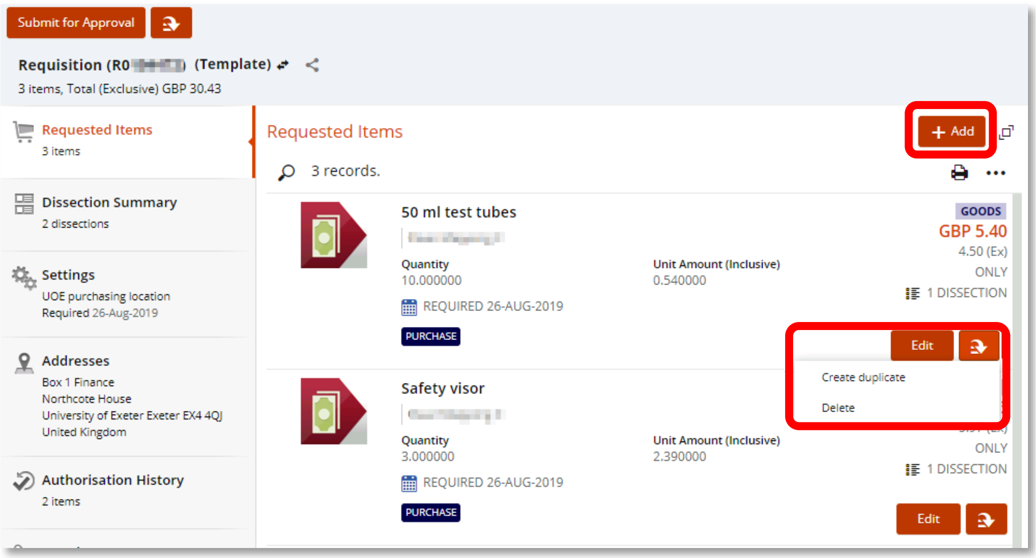
1. Once logged into T1 with your single sign on, navigate to the 'My Requisition' function tile.

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':

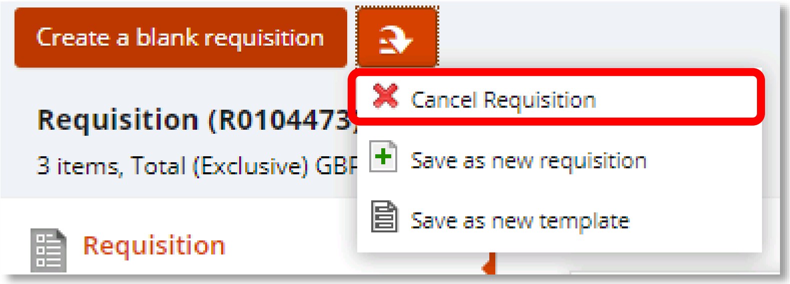


4. The template now opens and any of the existing detail can be changed or deleted or new lines can be added:



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 financehelpdesk@exeter.ac.uk