

How to Save and Use a Template in Requisitions

Also, see Job Aid, **How to Save and Use Favorites in Requisitions**, for the steps to save specific requisition lines to your Favorites folder and use them to create new requisitions.



This job aid describes how to save and use a template in requisitions. The end user must first create a requisition with line items and then navigate to the Review and Submit tab. Please see the eProcurement for End Users guide for the steps to create a requisition.

Note: You must save and submit the requisition to save the template.

Templates allow the Operator to save an entire requisition to their Templates folder at the time the original requisition is created, which they may then use again to create new requisitions.

When a Template is used to create a new requisition, each Template line carries forward the following information:

- The vendor that was originally assigned to the Template.
- The category and the account code
- The original budget that was charged at the time the Template was created
- Line Comments

A Template does not carry the following information forward into a new requisition:

- Any information from the [UMass Req Info](#) page.
- Header Comments
- The Requisition Name

This information must be added to the new requisition at the time it is data entered.



Do not use Marketplace requisitions to create templates or favorites. They do not lend themselves well to the hard coded pricing and descriptions that are inherent with Marketplace purchases.

Step 1. Log into the e*mpac Application with your Username and Password.

HOW TO SAVE A REQUISITION AS A TEMPLATE:



Navigate to the following path:

eProcurement → Create Requisition → Review and Submit

Step 2. Complete the **Define Requisition**, **UMass Req Info**, and **Special Items** pages as you would normally do.

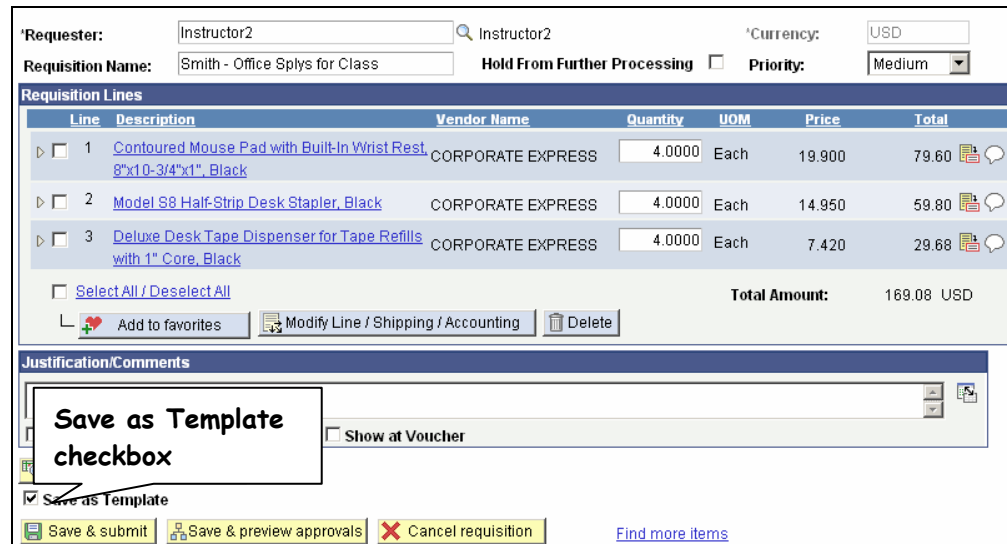
Make sure that you have completed all the steps, and that your requisition is ready to be saved. When you get to the **Review and Submit page**, proceed as follows:



The only way you will have to identify the requisition in your Templates folder for use on future requisitions is by the **Requisition Name**. Make sure that you name your requisition something memorable, to help to locate the Template later on.

Step 3. The *Create Requisition (Review and Submit)* page opens.

Select the **Save as Template** checkbox.



'Requester: Instructor2 'Currency: USD

Requisition Name: Smith - Office Splys for Class Hold From Further Processing Priority: Medium

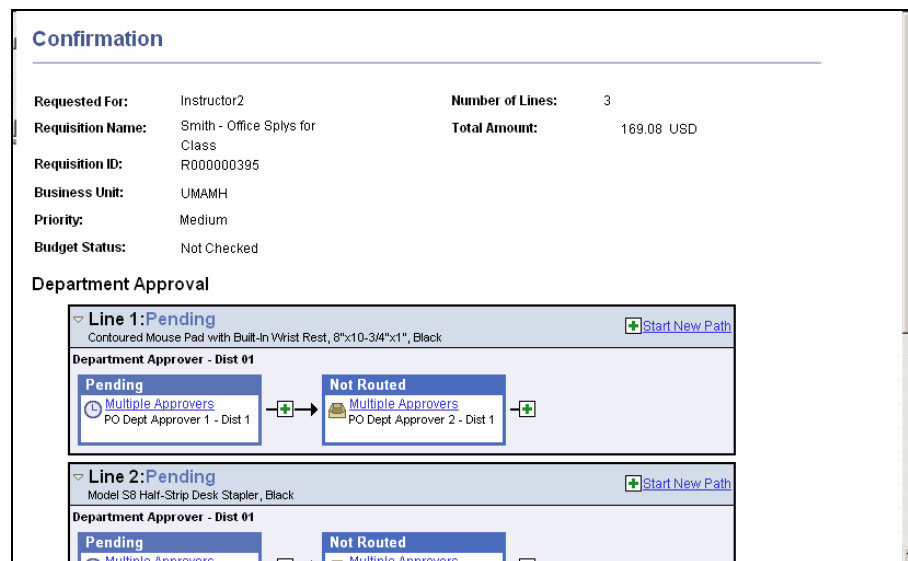
Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black	CORPORATE EXPRESS	4.0000	Each	19.900	79.60
2	Model S8 Half-Strip Desk Stapler, Black	CORPORATE EXPRESS	4.0000	Each	14.950	59.80
3	Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black	CORPORATE EXPRESS	4.0000	Each	7.420	29.68
Total Amount:						169.08 USD

Save as Template

Buttons: Save & submit, Save & preview approvals, Cancel requisition, Find more items

Step 4. Click the **Save & submit** button

The *Confirmation* page opens.



Confirmation

Requested For: Instructor2 Number of Lines: 3

Requisition Name: Smith - Office Splys for Class Total Amount: 169.08 USD

Requisition ID: R000000395

Business Unit: UMAMH

Priority: Medium

Budget Status: Not Checked

Department Approval

Line 1: Pending
Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black

Department Approver - Dist 01

```

graph LR
    A[Pending: Multiple Approvers  
PO Dept Approver 1 - Dist 1] --> B[Not Routed: Multiple Approvers  
PO Dept Approver 2 - Dist 1]
  
```

Line 2: Pending
Model S8 Half-Strip Desk Stapler, Black

Department Approver - Dist 01

```

graph LR
    C[Pending: Multiple Approvers] --> D[Not Routed: Multiple Approvers]
  
```



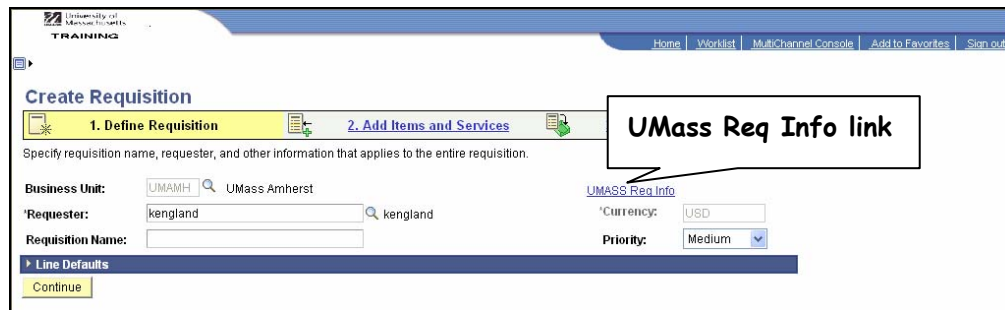
The **Requisition ID** is generated. If you do not Name your Requisition, the Template will be saved with the Requisition ID.

HOW TO USE A TEMPLATE

Step 5. Navigate to the following path:

eProcurement → Create Requisition

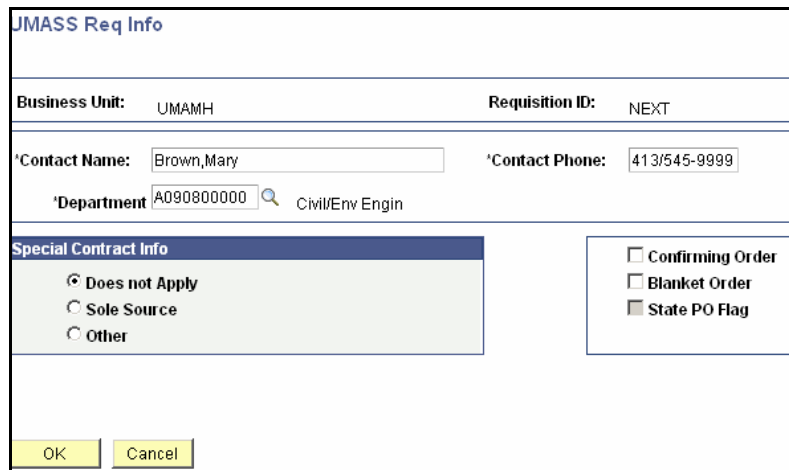
The **Create Requisition (Define Requisition)** page opens.



Step 6. Define Requisition page:

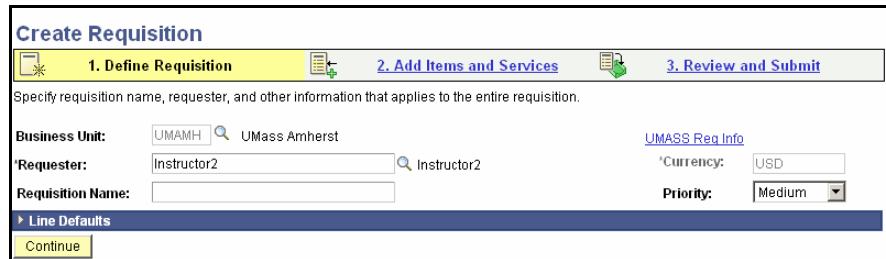
Complete the [UMass Req Info](#) sub-page on the **Define Requisition** page

Click the **OK** button



The **Define Requisition** page redisplay.

Do not enter any additional information in the **Define Requisition** page:



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Specify requisition name, requester, and other information that applies to the entire requisition.

Business Unit: UMass Amherst [UMASS Rea Info](#)

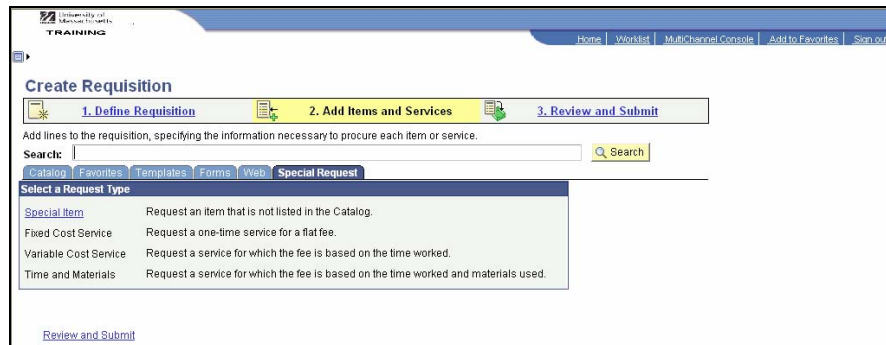
Requester: Instructor2 **Currency:**

Requisition Name: **Priority:**

Line Defaults

Step 7. Click the [Add Items and Services](#) link.

The **Create Requisition – Add Items and Services (Special Request)** page opens.



University of Massachusetts TRAINING

Home | Worklist | Multichannel Console | Add to Favorites | Sign out

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

Catalog | Favorites | Templates | Forms | Web | **Special Request**

Select a Request Type

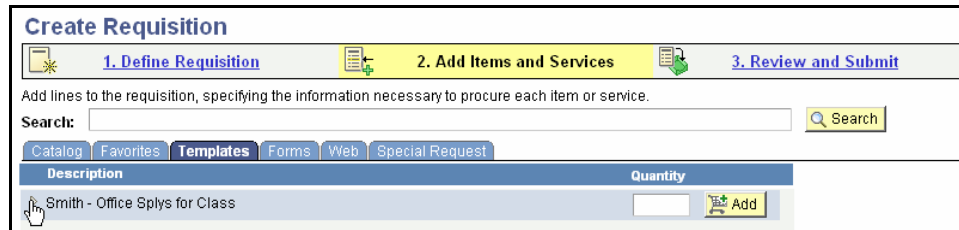
Special Item	Request an item that is not listed in the Catalog.
Fixed Cost Service	Request a one-time service for a flat fee.
Variable Cost Service	Request a service for which the fee is based on the time worked.
Time and Materials	Request a service for which the fee is based on the time worked and materials used.

[Review and Submit](#)

Step 8. Click the **Templates** tab.

The **Create Requisition – Add Items and Services (Templates)** page opens. All your saved templates display. The **Description** field = the Requisition Name that the original requisition was saved under when you created the Template.

Scroll down the page until you locate the desired template (the most recently saved template displays at the top – in this example it is unnecessary to scroll.)



Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

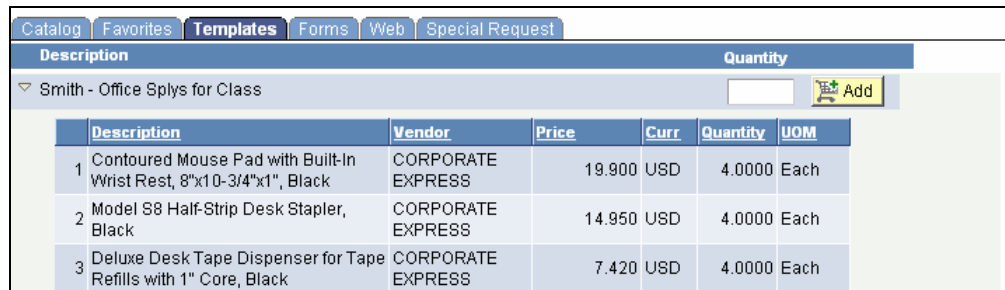
Search:

Catalog | Favorites | **Templates** | Forms | Web | Special Request

Description	Quantity
Smith - Office Splys for Class	<input type="text"/> <input type="button" value="Add"/>

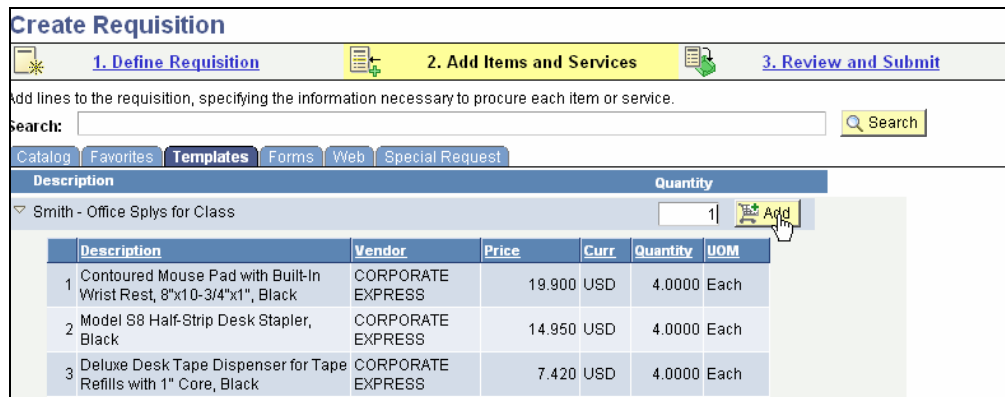
Step 9. Click the **Expand Section** icon next to the **Requisition ID**.

The Requisition Template expands and displays the items contained in the template.



Description	Quantity																								
▼ Smith - Office Splys for Class <input type="text"/> <input type="button" value="Add"/> <table border="1"> <thead> <tr> <th>Description</th> <th>Vendor</th> <th>Price</th> <th>Curr</th> <th>Quantity</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td>1 Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black</td> <td>CORPORATE EXPRESS</td> <td>19.900</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> <tr> <td>2 Model S8 Half-Strip Desk Stapler, Black</td> <td>CORPORATE EXPRESS</td> <td>14.950</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> <tr> <td>3 Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black</td> <td>CORPORATE EXPRESS</td> <td>7.420</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> </tbody> </table>	Description	Vendor	Price	Curr	Quantity	UOM	1 Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black	CORPORATE EXPRESS	19.900	USD	4.0000	Each	2 Model S8 Half-Strip Desk Stapler, Black	CORPORATE EXPRESS	14.950	USD	4.0000	Each	3 Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black	CORPORATE EXPRESS	7.420	USD	4.0000	Each	<input type="text"/> <input type="button" value="Add"/>
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Step 10. Insert a Quantity of 1 in the **Quantity** field and **Click** the **Add** button.



Description	Quantity																								
▼ Smith - Office Splys for Class <input type="text" value="1"/> <input type="button" value="Add"/> <table border="1"> <thead> <tr> <th>Description</th> <th>Vendor</th> <th>Price</th> <th>Curr</th> <th>Quantity</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td>1 Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black</td> <td>CORPORATE EXPRESS</td> <td>19.900</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> <tr> <td>2 Model S8 Half-Strip Desk Stapler, Black</td> <td>CORPORATE EXPRESS</td> <td>14.950</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> <tr> <td>3 Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black</td> <td>CORPORATE EXPRESS</td> <td>7.420</td> <td>USD</td> <td>4.0000</td> <td>Each</td> </tr> </tbody> </table>	Description	Vendor	Price	Curr	Quantity	UOM	1 Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black	CORPORATE EXPRESS	19.900	USD	4.0000	Each	2 Model S8 Half-Strip Desk Stapler, Black	CORPORATE EXPRESS	14.950	USD	4.0000	Each	3 Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black	CORPORATE EXPRESS	7.420	USD	4.0000	Each	<input type="text" value="1"/> <input type="button" value="Add"/>
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Note: You may change the **Quantity** of the whole template. However, a quantity of 2 would double the quantity of each item. You cannot change the quantities of the individual items until you go to the **Review and Submit** page.

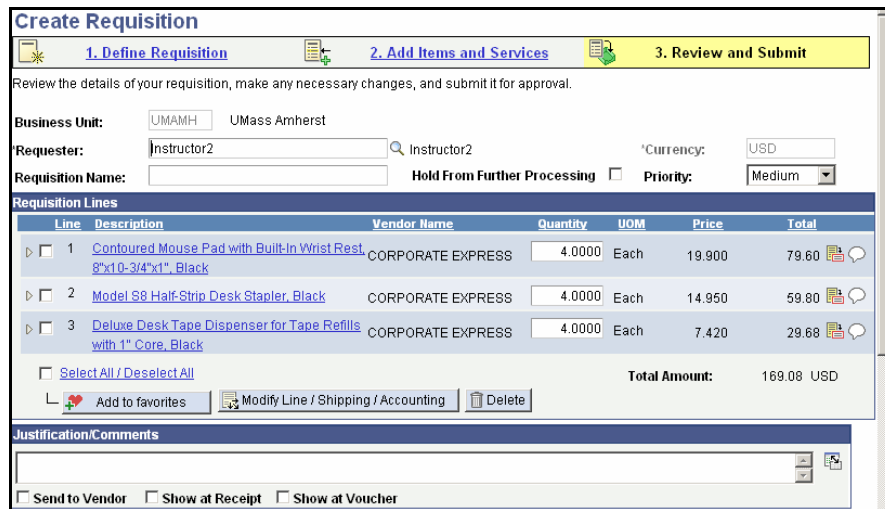


Templates cannot be deleted.

Step 11.

Click the  hyperlink tab

The **Review and Submit** page opens. The items from the template display:



Create Requisition

1. Define Requisition | 2. Add Items and Services | **3. Review and Submit**

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: UAMAMH UMass Amherst

Requester: Instructor2 *Currency: USD

Requisition Name: Hold From Further Processing **Priority:** Medium

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black	CORPORATE EXPRESS	4.0000	Each	19.900	79.60
2	Model S8 Half-Strip Desk Stapler, Black	CORPORATE EXPRESS	4.0000	Each	14.950	59.80
3	Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black	CORPORATE EXPRESS	4.0000	Each	7.420	29.68
Total Amount:						169.08 USD

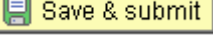
Select All / Deselect All

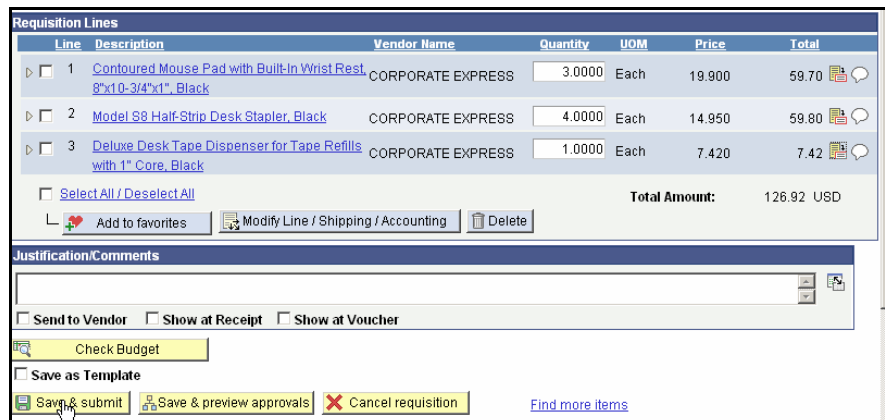
Send to Vendor Show at Receipt Show at Voucher



You may edit the requisition: Quantity, unit prices, budget, descriptions, etc., in accordance with your end user training for entering/editing a requisition.

Step 12.

Scroll down the page and Click the  button to save the requisition and submit it to workflow:



Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black	CORPORATE EXPRESS	3.0000	Each	19.900	59.70
2	Model S8 Half-Strip Desk Stapler, Black	CORPORATE EXPRESS	4.0000	Each	14.950	59.80
3	Deluxe Desk Tape Dispenser for Tape Refills with 1" Core, Black	CORPORATE EXPRESS	1.0000	Each	7.420	7.42
Total Amount:						126.92 USD


Select All / Deselect All

Send to Vendor Show at Receipt Show at Voucher

Save as Template

Save & submit | Save & preview approvals | Cancel requisition | Find more items

Step 13. The **Requisition Confirmation** page opens.

Scroll down to the bottom of the page and **Click** the  button.

Confirmation

Requested For:	Instructor2	Number of Lines:	3
Requisition Name:	R000000396	Total Amount:	126.92 USD
Requisition ID:	R000000396		
Business Unit:	UMAMH		
Priority:	Medium		
Budget Status:	Not Checked		

Department Approval

Line 1: Pending [+ Start New Path](#)

Contoured Mouse Pad with Built-In Wrist Rest, 8"x10-3/4"x1", Black

Department Approver - Dist 01

Pending

Multiple Approvers
PO Dept Approver 1 - Dist 1

→

Not Routed

Multiple Approvers
PO Dept Approver 2 - Dist 1

Line 2: Pending [+ Start New Path](#)

Model S8 Half-Strip Desk Stapler, Black

Department Approver - Dist 01

Pending

Multiple Approvers

→

Not Routed

Multiple Approvers

The **Budget Check** status should show **Valid**.

End Job Aid

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