

Order Template Maintenance

Accounting
Supply
Chain
MASCENT Enterprise



Course Agenda

Order Template Overview	
Creating an Ordering Template	
Associating Ordering Templates	
Maintaining Ordering Templates	
Wrap-Up	

Order Template Overview

Ordering Templates

As an Ordering Template Manager you will be able to create Ordering Templates for people in Departments you have access to.

Once you create the Template and associate it with the desired users, they will be able to locate it in the **Template Tab** when they Create Requisitions:

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:

Description		Quantity				
All Period Products for Weekly Orde		<input type="text"/> <input type="button" value="Add"/>				
Template Items		Customize Find View All First 1-5 of 8 Last				
	Description	Vendor	Status	Price	Quantity	UOM
1	<input checked="" type="checkbox"/> TUBE 105MM 10MM CUF SGL CAN LP RND TIP OBT SHLY TRCH LF DISP	OWENS&MINOR INC	Active	26.28000 USD	<input type="text" value="1.0000"/>	Each
2	<input checked="" type="checkbox"/> TUBE 10MM STD HOOD PED T SHP STPR PLG ARWY TRCH	HOOD LABORATORIES	Active	192.43000 USD	<input type="text" value="1.0000"/>	Each
3	<input checked="" type="checkbox"/> TUBE 10MM T FR STND PLG ARWY XLNG THOR	HOOD LABORATORIES	Active	225.63000 USD	<input type="text" value="1.0000"/>	Each

Creating an Ordering Template

Creating an Ordering Template

To create an ordering Template you will navigate to eProcurement > Ordering Templates > Ordering Templates and enter the following information:

- **Template ID:** this will be used to locate the Template, so make it recognizable to you
- **Effective Date:** the current date will default, but you can set to a future date
- **Description:** be descriptive, but concise

Ordering Templates

SetID TJU Template ID PERIOP_001

Template Description Find | View All | First

*Effective Date: 06/02/2011 31 *Status: Active

*Description: Periop Template 001 Short Descr: Periop 001

Item Configuration Customize | Find | View All | 1 of 1 | First | Last

*Seq Nbr	*Component Item	Description	*Quantity	Unit of Measure
0			1	

Status will default to Active

Adding Items

Once you have set up the Template you will add all of your desired Items to it by **adding new rows** and selecting the desired **Component Items**. Unit of Measure and Description will default from the Item Master.

*Seq Nbr	*Component Item	Description	*Quantity	Unit of Measure		
10	1000005	CAP SQUIRTCAP SYR SYR TIP PLS	1	EA	+	-
20	1000027	CATHETER ART 7.5FR 110CM TD OX	1	EA	+	-
30	1000109	CATHETER URTH BDX IC 16FR FLY	1	EA	+	-

You will then enter the **Sequence Number** to indicate what order the Items will be listed in the Template. No blanks, duplicate numbers, or 0's will be allowed.

Tip: when assigning sequence numbers, include space to allow for additional items to be added in later on, without the need to re-number all entries. For example, assign Sequence numbers *10*, *20*, and *30*.

Assign a Template

Assigning a Template

Once you have created a Template, you will be able to assign it to specific Users and Departments to make it available for their use. You will only be able to assign a Template to Departments you have access to.

First you will need to locate and select the Template you want to assign. On the **Find an Existing Value** tab you can search all or select a specific **Template ID**.

Ordering Templates

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Limit the number of results to (up to 300):

SetID:

Template ID:

Description:

Include History Correct History Case Sensitive

[Basic Search](#) [Save Search Criteria](#)

Assigning a Template

Once you locate the Template, click the **Associate Template to Users** link:

Ordering Templates

SetID TJU Template ID PERIOP_001

Template Description Find | View All First 1 of 1

*Effective Date: 06/02/2011 [BY] *Status: Active

*Description: Periop Template 001 Short Descr: Periop 001

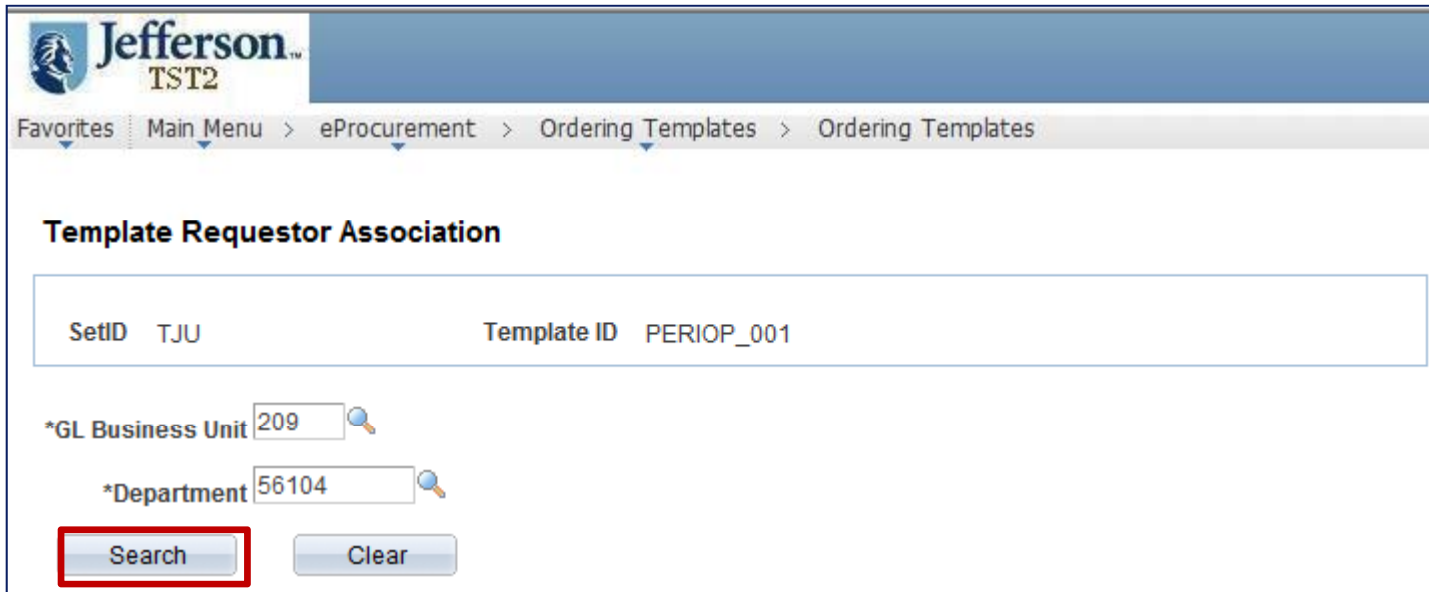
Item Configuration Customize | Find | View All | [L] [R] First 1-3 of 3 Last

*Seq Nbr	*Component Item	Description	*Quantity	Unit of Measure		
10	1000005	CAP SQUIRTCAP SYR SYR TIP PLS	1	EA	+	-
20	1000027	CATHETER ART 7.5FR 110CM TD OX	1	EA	+	-
30	1000109	CATHETER URTH BDX IC 16FR FLY	1	EA	+	-

[Associate Template to Users](#)

Assigning a Template

To assign a Template you will need to select a **GL Business Unit** and **Department**. You will only be able to select those you have access to.



The screenshot shows the Jefferson TST2 eProcurement interface. The breadcrumb trail is: Favorites > Main Menu > eProcurement > Ordering Templates > Ordering Templates. The page title is "Template Requestor Association". Below the title, there is a table with two columns: "SetID" and "Template ID". The first row contains the values "TJU" and "PERIOP_001". Below the table, there are two input fields: "*GL Business Unit" with the value "209" and "*Department" with the value "56104". Both input fields have a magnifying glass icon to the right. At the bottom of the form, there are two buttons: "Search" and "Clear". The "Search" button is highlighted with a red border.

Once you select the GL Business Unit and Department, click **Search**.

Assigning a Template

Upon search all users associated with the GL Business Unit and Department you selected will be returned.

You will then choose which users have access to the Template by selecting to **Include** them. Users that aren't selected will **not** have access to the template. Once all users are selected, confirm your entry and **Save**.



Search Clear

Customize | Find | First 1-19 of 19 Last

	Include	Requester	Requester	GL Business Unit	Department
5	<input type="checkbox"/>	dgm001	Maszka, David		
6	<input checked="" type="checkbox"/>	efh005	Hachey, Edward	250	56105
7	<input checked="" type="checkbox"/>	gxb003	Butt, Gloria	250	56105

OK Save Return

You can assign the same Template to multiple Departments by repeating the process above for each.

Maintaining Templates

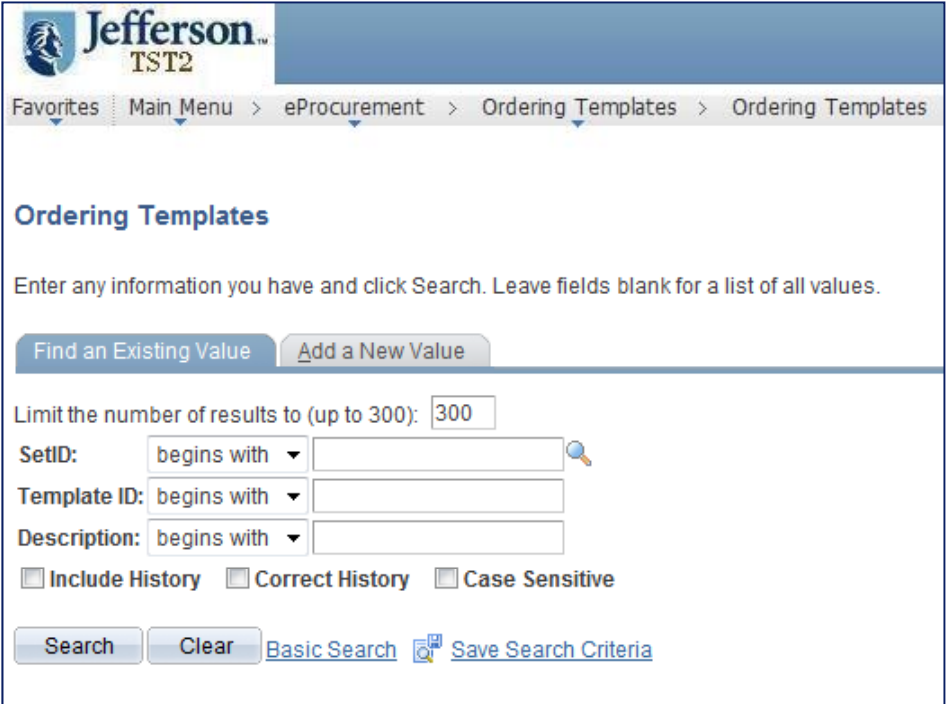
Maintaining Templates

When you need to edit a Template, you will navigate back to eProcurement > Ordering Templates > Ordering Templates and search for the desired Template on the Find an Existing Value tab.

You can search by SetID, Template ID, and/or Description.

Once you locate the Template you will be able to:

- Add Items
- Delete Items
- Re-Sequence Items



The screenshot displays the Jefferson University and Hospitals eProcurement system interface. The page title is "Ordering Templates". Below the title, there is a search instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values." There are two tabs: "Find an Existing Value" (selected) and "Add a New Value". A "Limit the number of results to (up to 300):" field is set to "300". Below this are three search criteria fields: "SetID:", "Template ID:", and "Description:", each with a "begins with" dropdown menu and a search input field. There are also three checkboxes: "Include History", "Correct History", and "Case Sensitive". At the bottom, there are "Search" and "Clear" buttons, along with links for "Basic Search" and "Save Search Criteria".

Adding an Item

To make any edits you must first click the **Correct History** button. From there you can **add a new row** and select the desired **Component Items** as needed.

The screenshot shows a software interface titled "Template Description". At the top, there are fields for "*Effective Date:" (06/02/2011), "*Status:" (Active), "*Description:" (Periop Template 001), and "Short Descr:" (Periop 001). Below this is a table titled "Item Configuration" with columns: "*Seq Nbr", "*Component Item", "Description", "*Quantity", and "Unit of Measure". The table contains three rows of data. To the right of each row are "+" and "-" buttons. At the bottom of the interface are several buttons: "Save", "Return to Search", "Notify", "Add", "Update/Display", "Include History", and "Correct History". The "Correct History" button is highlighted with a red box, and the "+" buttons in the table are also highlighted with a red box.

*Seq Nbr	*Component Item	Description	*Quantity	Unit of Measure		
10	1000005	CAP SQUIRTCAP SYR SYR TIP PLS	1	EA	+	-
20	1000027	CATHETER ART 7.5FR 110CM TD OX	1	EA	+	-
30	1000109	CATHETER URTH BDX IC 16FR FLY	1	EA	+	-

There is no limit to the amount of Items you can add.

Deleting an Item

When an Item is deleted from the Master Catalog it is automatically removed from all Ordering Templates, but you can perform manually to your Templates whenever you require it.

To delete an item you will again locate the desired Template and click the **Correct History** button.

You will then select the **remove a row** button as needed and confirm the deletion.

The screenshot displays the 'Ordering Templates' interface. At the top, the 'SetID' is 'TJU' and the 'Template ID' is 'PERIOP_001'. Below this, the 'Template Description' section shows an '*Effective Date' of '06/27/2011' and a '*Description' of 'Periop Template 001'. The 'Short Descr:' is 'Periop 001'. A 'Delete Confirmation' dialog box is overlaid on the interface, asking 'Delete current/selected rows from this page? The delete will occur when the transaction is saved.' with 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a red box. Below the dialog, the 'Item Configuration' table is visible, showing three rows of items. The 'remove a row' button (a minus sign) for the first row is highlighted with a red box.

*Seq Nbr	*Component Item	Description	*Quantity	Unit of Measure		
0	1000002	SET ADM 40IN MDLN 2ND CP	1	EA	+	-
10	1000005	CAP SQUIRTCAP SYR SYR TIP PLS	1	EA	+	-
20	1000027	CATHETER ART 7.5FR 110CM TD OX	1	EA	+	-

Updating Users' Templates

When editing is complete, upon Save you will be prompted to re-associate the Template with the desired users so that the updates you made are reflected in their Templates.

- Click the [Associate Template to Users](#) hyperlink.
- All users previously associated with the Template will be returned.
- To re-associate them, click OK and Save.

If you want to associate with new users you will re-select a GL Business Unit and Department, select the additional users you want to allow access to the Template, and click OK, then Save.

*GL Business Unit

*Department

	Include	Requester	Requester	GL Business Unit	Department
1	<input checked="" type="checkbox"/>	REQPE	TJ Requester PeriOp	250	56105
2	<input checked="" type="checkbox"/>	efh005	Hachey, Edward	250	56105
3	<input checked="" type="checkbox"/>	gxb003	Butt, Gloria	250	56105

[Return](#)

Ordering Template Wrap-Up

Ordering Template Wrap-Up

Keep in mind:

- As an Ordering Template Manager you will be able to create Ordering Templates for people in the Departments you have access to
- To create a Template you will enter the Template ID, effective date, description, status, and any items you would like to include
- You will then assign the Template to specific Users and Departments to make it available for their use.
- When an Item is deleted from the Master Catalog it is automatically removed from all Ordering Templates, but you can perform manually to your Templates whenever you require it.
- To edit an existing Template you must first select the Correct History button
- When edits are complete you will need to re-associate the Template with the desired users so that the updates you made are reflected in their Templates