Order Template Maintenance

Course Agenda

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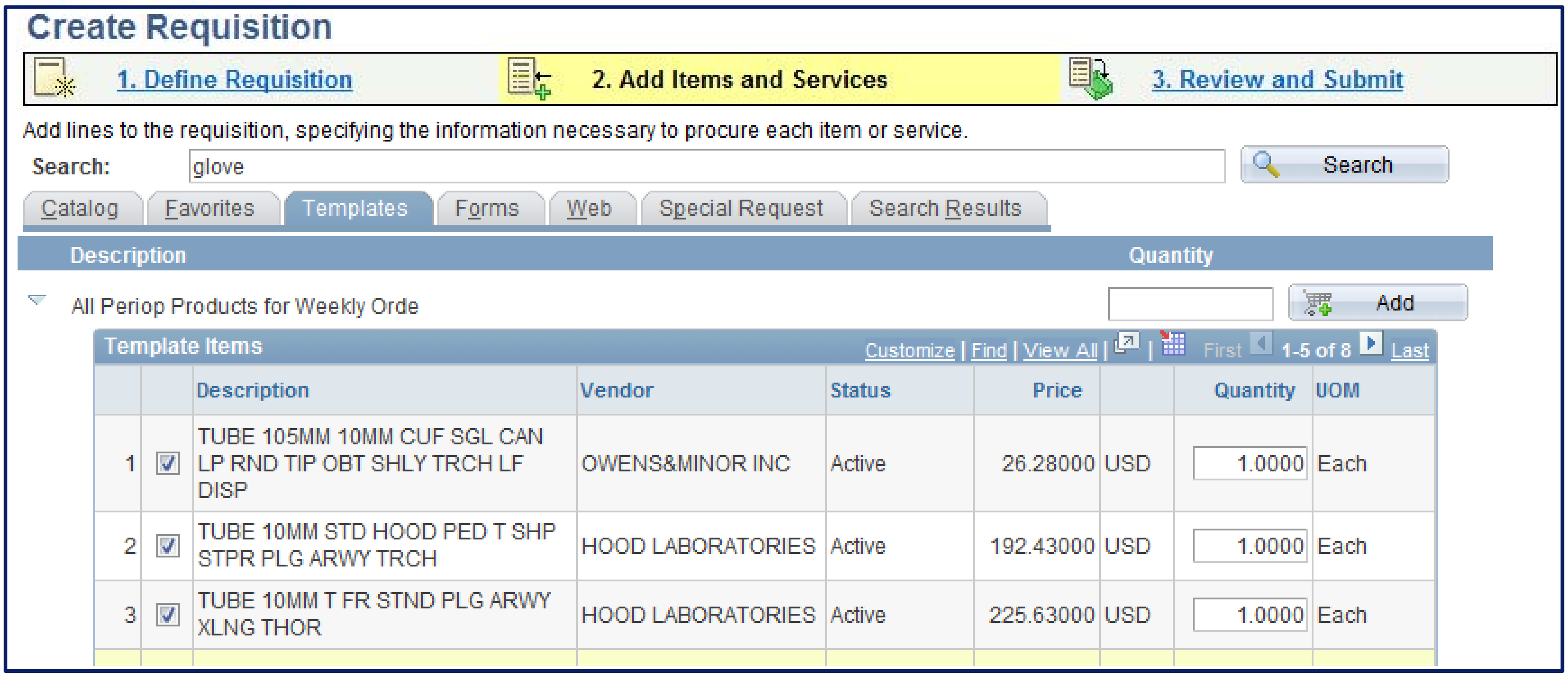
Order Template Overview

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:



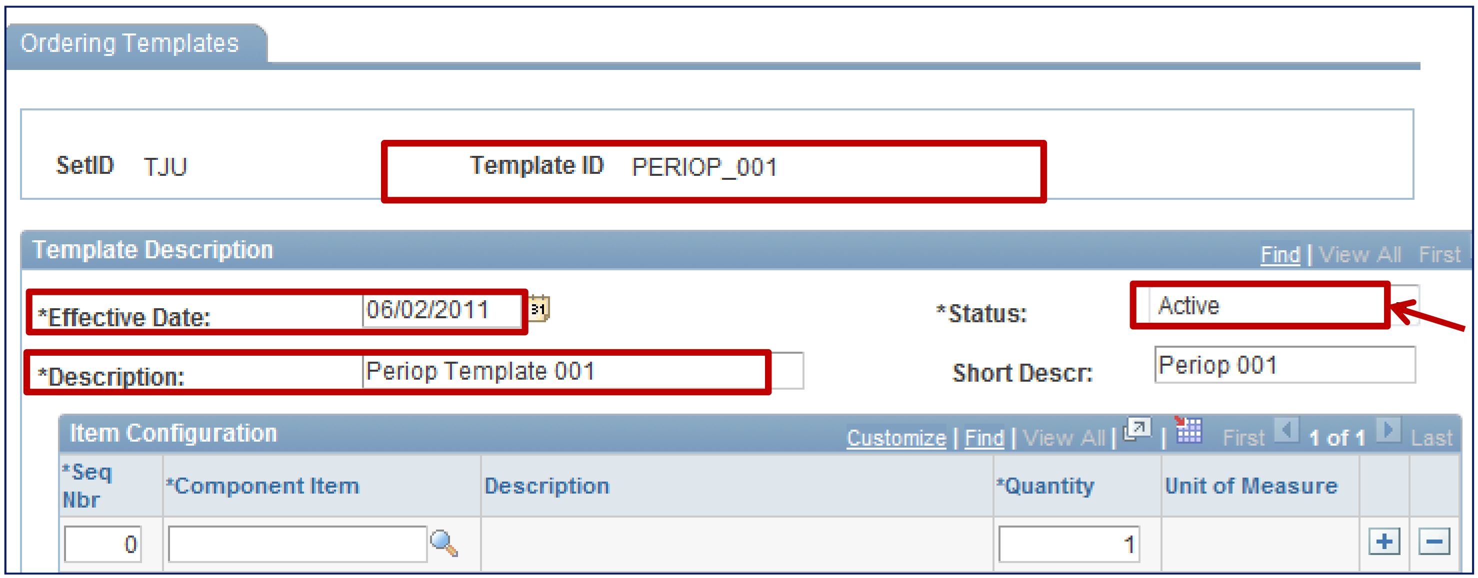
Creating an Ordering Template

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



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.

Item Configuration — Customize | Find | View All | 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	+	−

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.

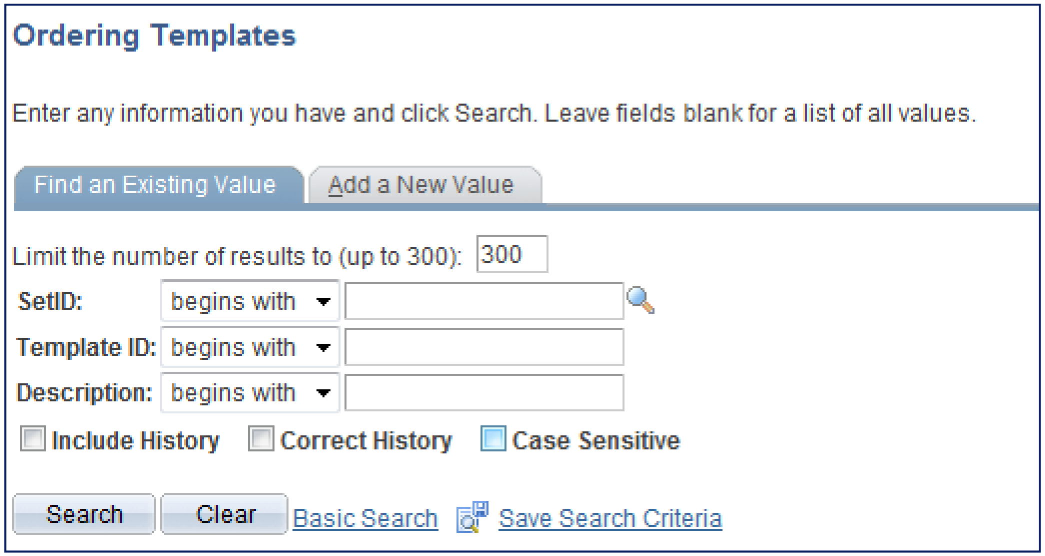
Tip: when assigning sequence numbers, include space to allow for additional items to be added in later on, without the need to re-number all entries. For example, assign Sequence numbers *10*, *20*, and *30*.

Assign a Template

Assigning a Template

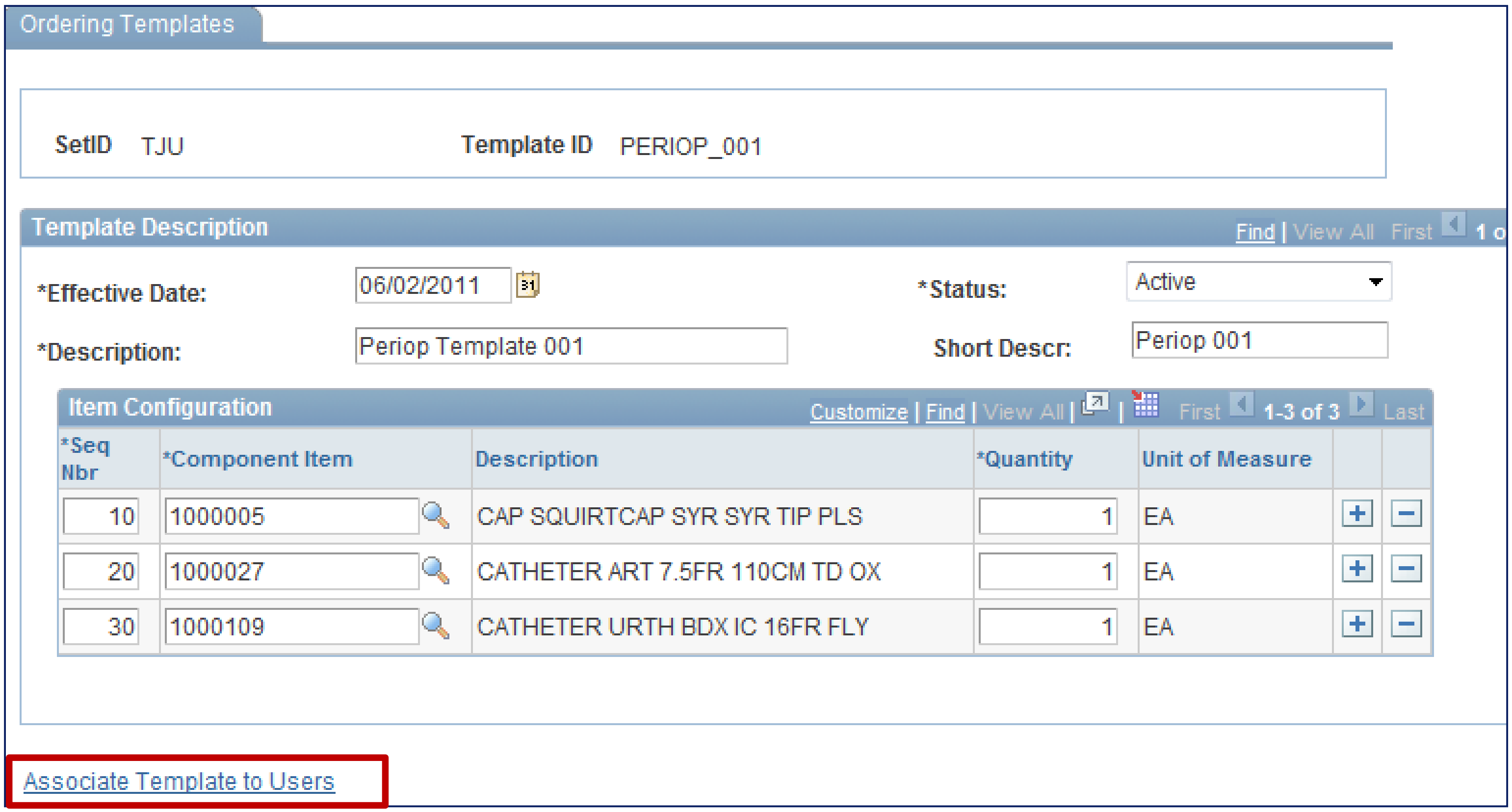
Once you have created a Template, you will be able to assign it to specific Users and Departments to make it available for their use. You will only be able to assign a Template to Departments you have access to.

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**.



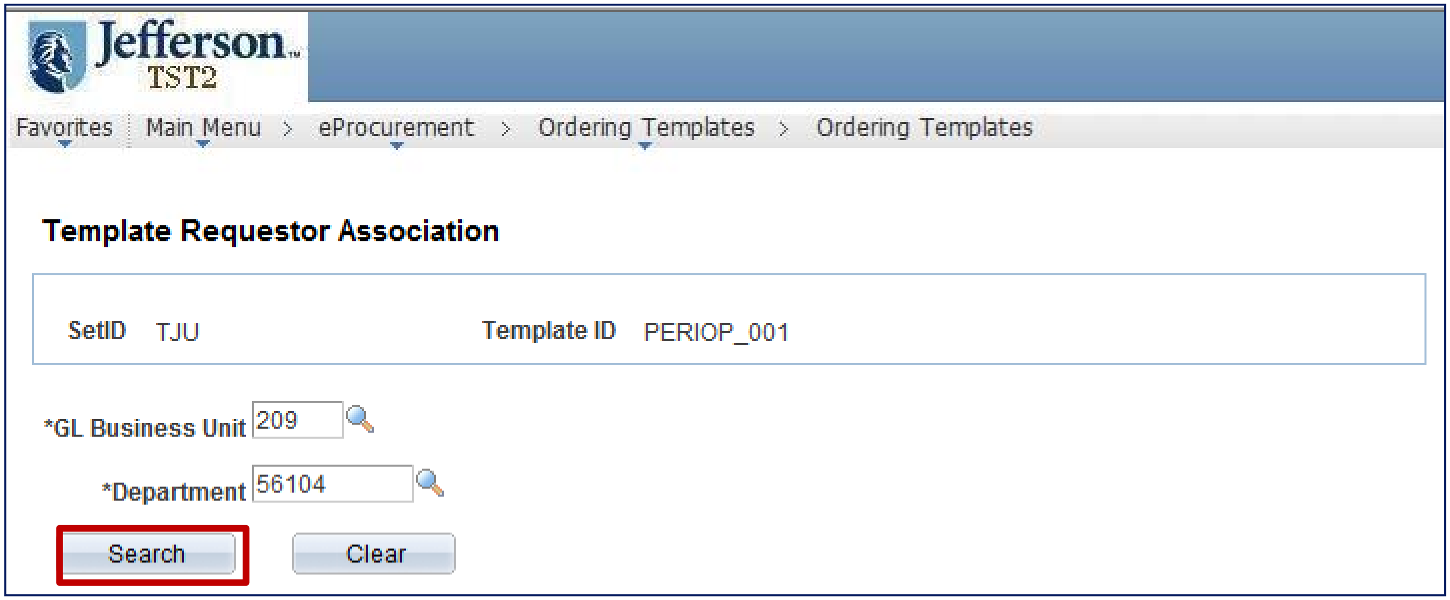
Assigning a Template

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



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.

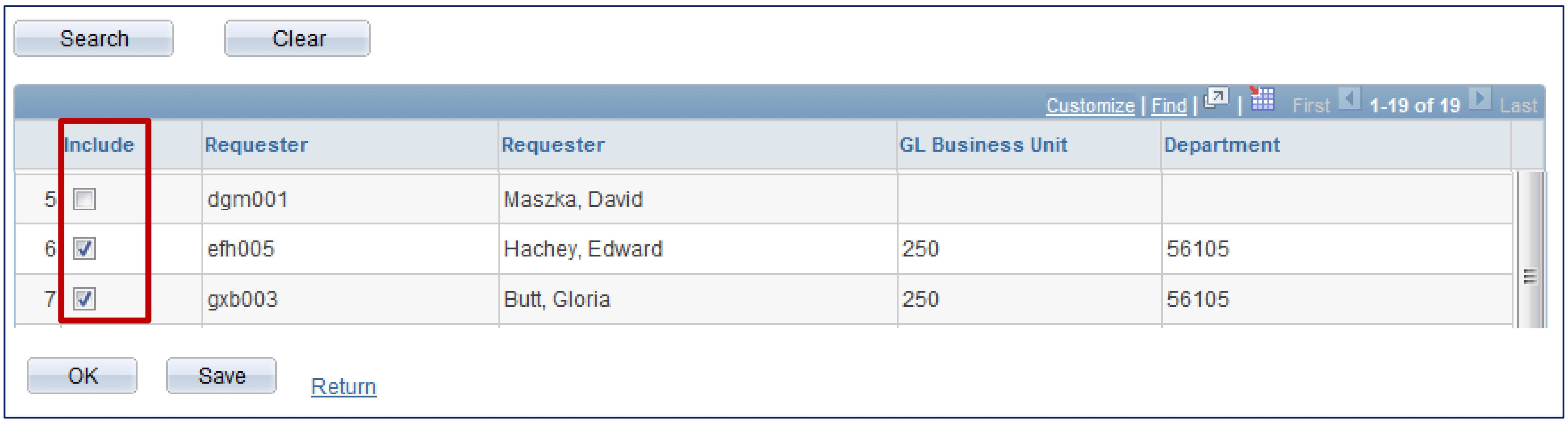


Once you select the GL Business Unit and Department, click **Search**.

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**.



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

Maintaining Templates

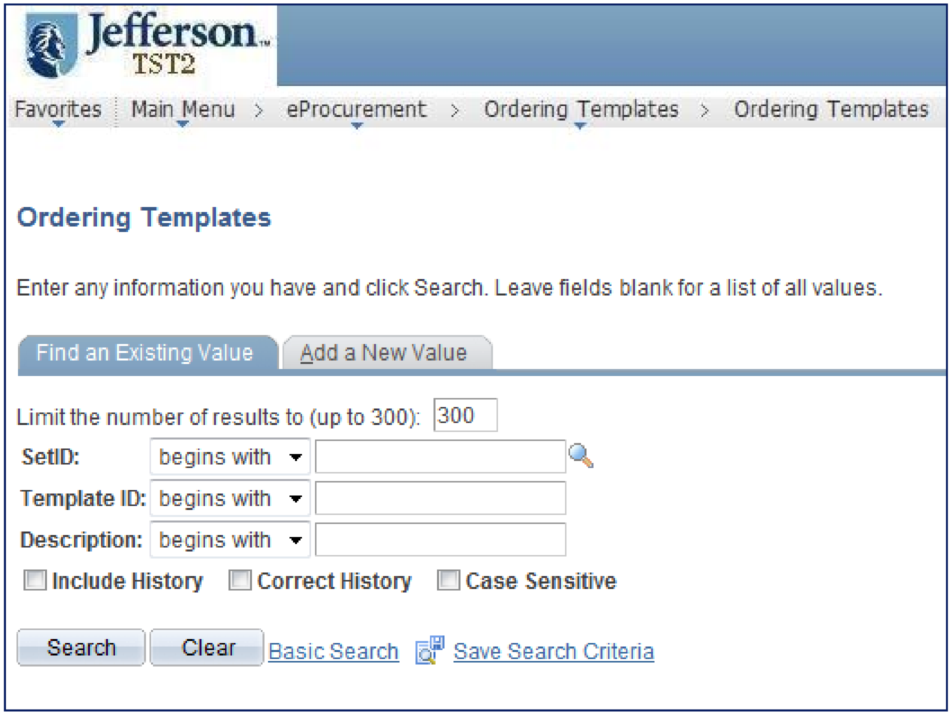
Maintaining Templates

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

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

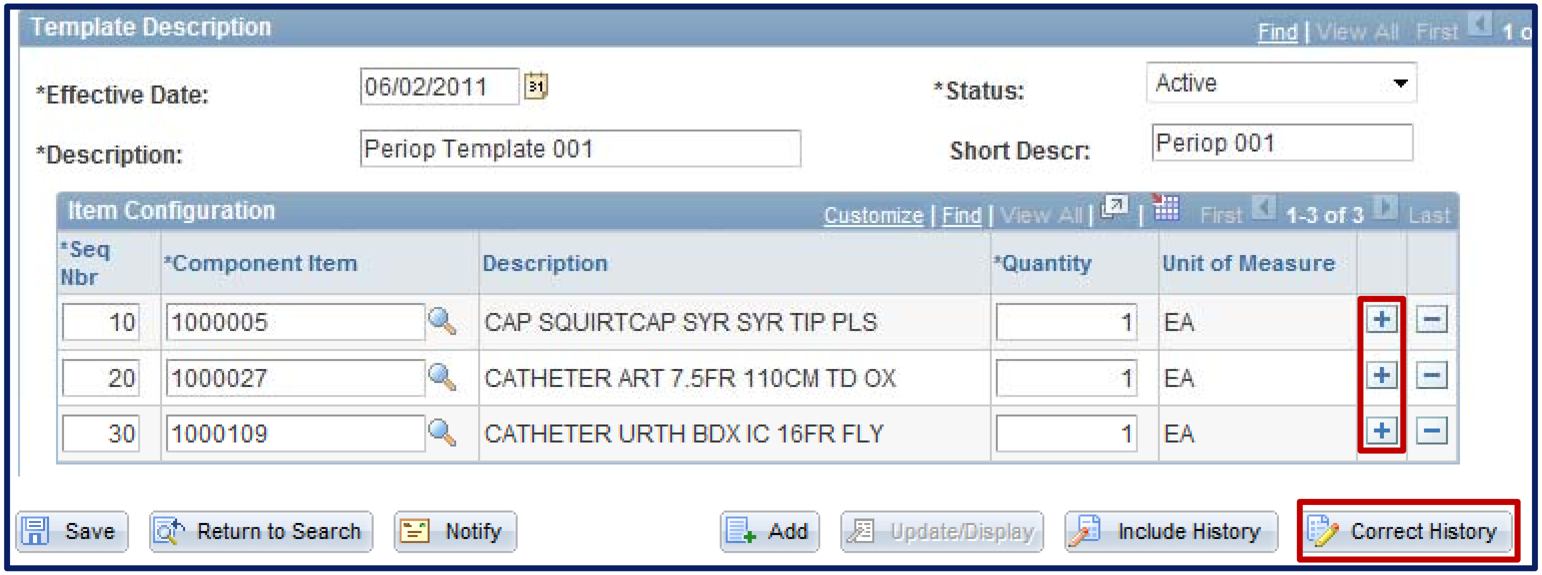
Once you locate the Template you will be able to:

- Add Items
- Delete Items
- Re-Sequence Items



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.



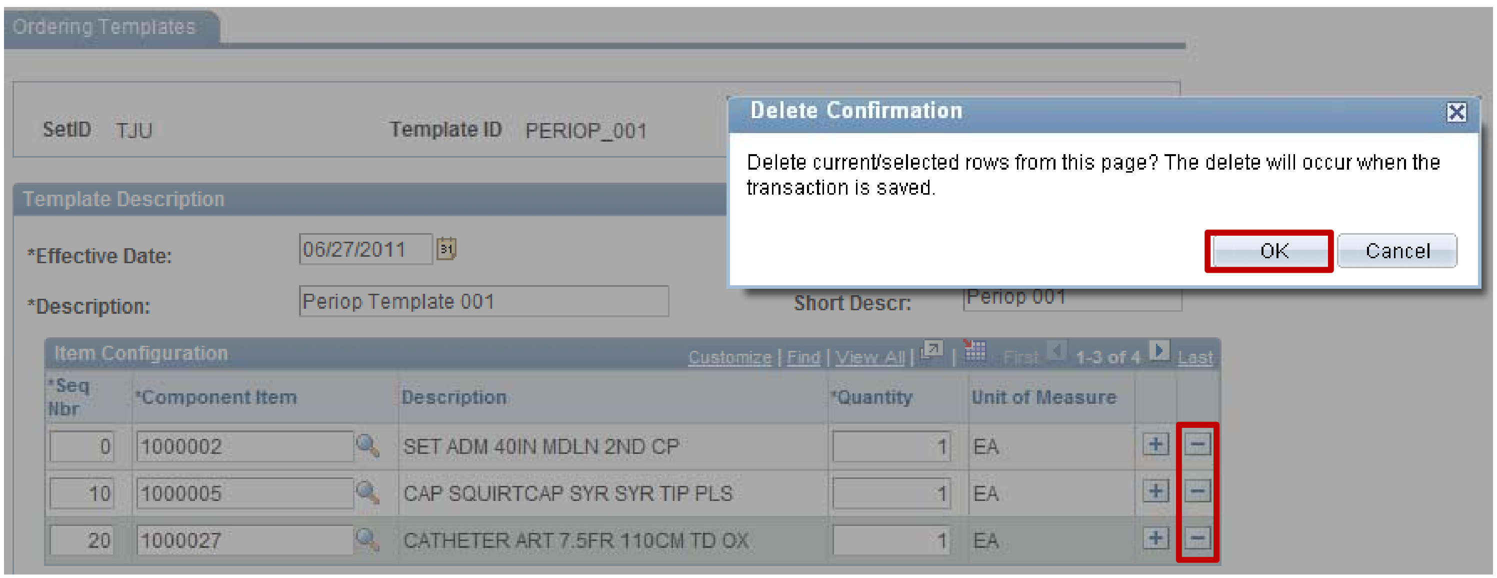
There is no limit to the amount of Items you can add.

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.



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

Search   Clear

Customize | Find | First 1-3 of 3 Last

	Include	Requester	Requester	GL Business Unit	Department
1	☑	REQPE	TJ Requester PeriOp	250	56105
2	☑	efh005	Hachey, Edward	250	56105
3	☑	gxb003	Butt, Gloria	250	56105

OK   Save   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