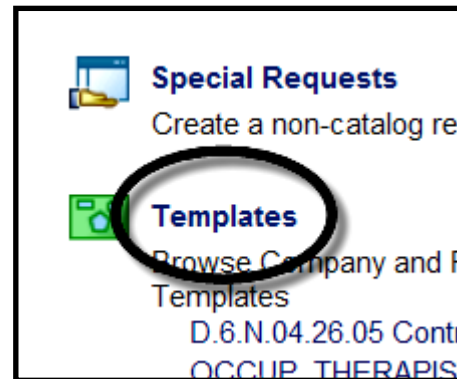


Templates

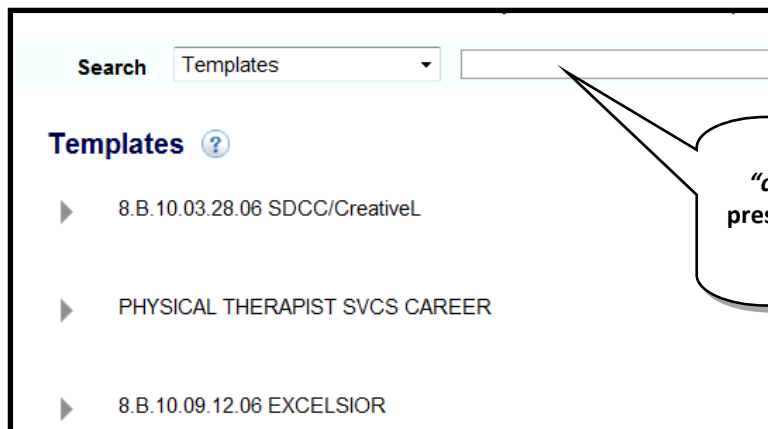
To Order Computers, and a Great Shortcut to Repeat Orders

This Job Aid shows how to use eProcurement Templates. You can use pre-created templates provided by the school district, or you can create your own customized templates, which you can save, edit, delete, and share with other district employees.

1. From the eProcurement Home Page, click **Templates**.

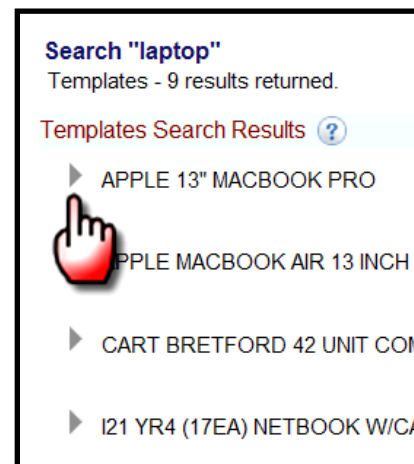


2. On the Templates page, search for pre-created templates by either scrolling down the page, or by entering a keyword search.



Type a keyword (such as "computer" or "laptop") and press your ENTER key, to narrow your search.

3. Once you locate the template you want, click the gray triangle button on the left to display the list of items in that template.



4. The entire list of individual items is displayed, within that template. This means that when you order this template, you will automatically place one of each of the listed items on your ePro requisition. In essence, you are going to make a copy of this template and then submit that copy as your ePro requisition.

Items Search Results

APPLE 13" MACBOOK PRO

Item Description	Item ID	UOM	Quantity	Action
SOFTWARE DISTRICT STANDARD LIC	00000000000003563	Each	1	Add
COMPUTER APPLE MACBOOK PRO 13	00000000000008018	Each		
APPLECARE EXTENDED WARRANTY	00000000000000000	Each		
SDUSD IMAGING SERVICE	00000000000008020	Each		
SDUSD INSTALLATION DELIVERY SE	00000000000008021	Each	1	
SDUSD LASER ENGRAVING	00000000000008022	Each	1	
CA E-WASTE FEE APPLE < 15 INC	00000000000008023	Each	1	

Type a number into the Quantity field, for how many you want. If you type a 1, you'll get one of each item. If you type a 2, you'll get 2 of each item, etc. Then, click the Add button to create your ePro requisition.

5. Hover your mouse over the Shopping Cart "lines" link in the upper right corner. The summary of your order will pop out, showing what has been placed on the requisition.

You can then edit your requisition as desired, before you submit it.

Click the **Checkout** button.

Requisition Settings | 7 Lines | Checkout

Description	Quantity	UOM
SDUSD SOFTWARE DISTRICT STANDAR...	1	EA
COMPUTER APPLE MACBOOK PRO 13 ...	1	EA
APPLECARE 3 YEAR EXTENDED WARR...	1	EA
SDUSD IMAGING SERVICE D2371LL/...	1	EA
SDUSD INSTALLATION DELIVERY SE...	1	EA
SDUSD LASER ENGRAVING	1	EA

6. Edit your requisition as desired, and then complete and submit the requisition:

- a) Give your order a name (in the Requisition Name field).
- b) Enter the budget string to pay for everything.
- c) Run a successful “Check Budget” to pre-encumber the funds.
- d) Click the Save & Submit button to submit the order for approval and processing.

Requisition Summary

Business Unit San Diego Unified School Dist Requisition Name

Requester Leslie Doe Priority

*Currency

Part Summary: Total Amount 1,178.93 USD

Expand lines to review shipping and accounting details Add

Requisition Lines [?](#)

Line	Description	Item ID	Supplier	Quantity	UOM
▶ <input type="checkbox"/> 1	SDUSD SOFTWARE DISTRICT STAND	000000000000003563	San Diego Unified School District	<input type="text" value="1.0000"/>	Each
▶ <input type="checkbox"/> 2	COMPUTER APPLE MACBOOK PRO 13	000000000000008018	Apple, Inc.	<input type="text" value="1.0000"/>	Each
▶ <input type="checkbox"/> 3	APPLECARE 3 YEAR EXTENDED WARR	000000000000008019	Apple, Inc.	<input type="text" value="1.0000"/>	Each

How to Create Your Own Customized Template

You can turn any eProcurement requisition into a template... even ones that have Special Request items, or Web supplier items. The template will retain anything you put on the requisition, including comments, and the budget strings.

First, build your requisition. Then, before you run the budget check or submit it, check the “Save as Template” checkbox, and save it. Then you can go ahead and finish the order, and submit it normally. The next time you want to submit that same order again, just call up your template, order a copy of it, edit the copy if you wish, run a successful budget check, and submit it.

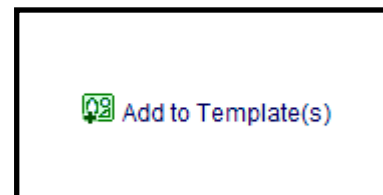
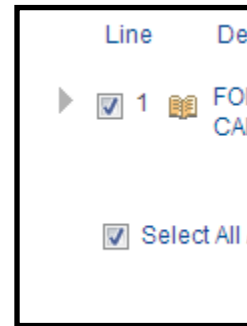
TIPS:

- When you use your template for the first time, you might want to edit the quantities so that there is only one of each item, and then resave the template.
- Be sure to give your template a good name that reflects what is in it.
- Once you create and save a template, you can always edit it or delete it in the future.
- You can choose to share your template with another district employee.

1. Once you have all the items you want on your eProcurement requisition that will become a template, and you also have given it a name, and added the budget numbers to pay for it, you should be on the "Checkout" screen (used to be called the "Review and Submit" page).

Click the **Select All** checkbox to place a checkmark next to each line item.

Underneath the last line item, about in the center of the screen, look for the **Add to Templates** link, and click it.



2. You'll see a page with any previously made templates listed at the top. Below that, in the **Add a new template** area, type a name and description for your template, and then click **OK**.

Add Selected Items to Template(s)


Templates Personalize | Filter

Template Name	Description
<input type="checkbox"/> SDUSD-0000076106	0000076106
<input type="checkbox"/> SDUSD-0000150311	Time For Kids Act.# 182018369

Add a new template

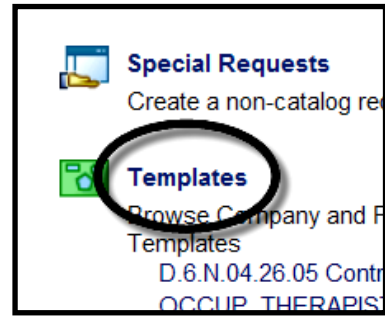
Template Name

Description

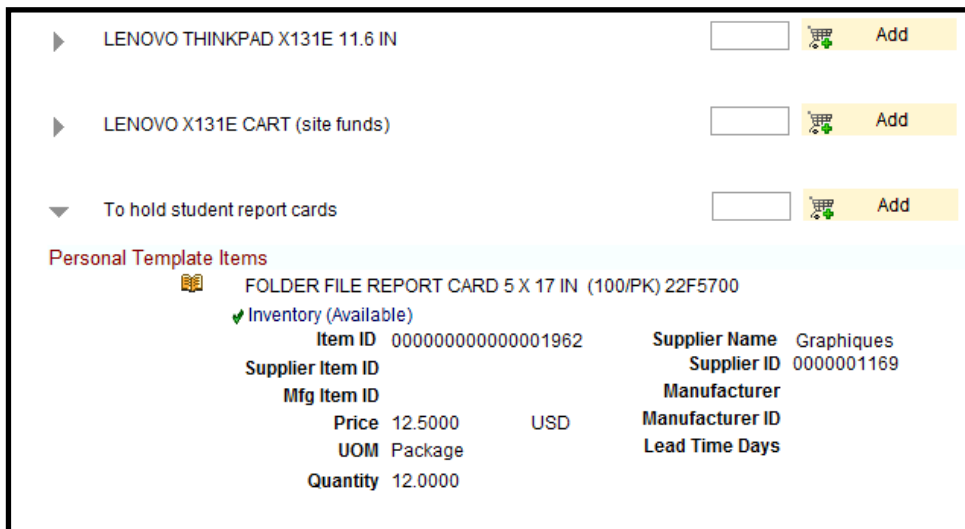


3. At this point, you can finish the active requisition that you just used to make a template and place the order, or not.

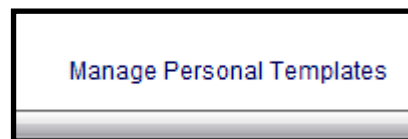
To check and see how your new template looks, navigate to the eProcurement Home Page, and click **Templates** again.



4. Scroll down to the bottom of the Templates list, and you should see your new custom template there. Click its gray triangle button to display the details of your template.



5. To manage your templates, at the very bottom of the list of templates, click the **Manage Personal Templates** link.



6. Here you can edit your templates, allow sharing with other employees, or even delete a template if you don't want it anymore.

