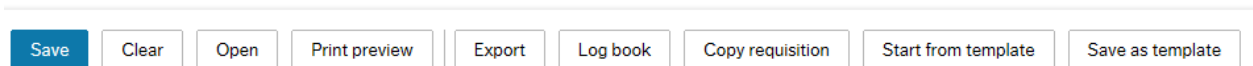


WEBREQ13: Using Template Requisitions

When raising a Requisition Agresso Web has the capability to allow the user to create template Requisitions which can then be used for a new Requisition using the details of the template requisition.

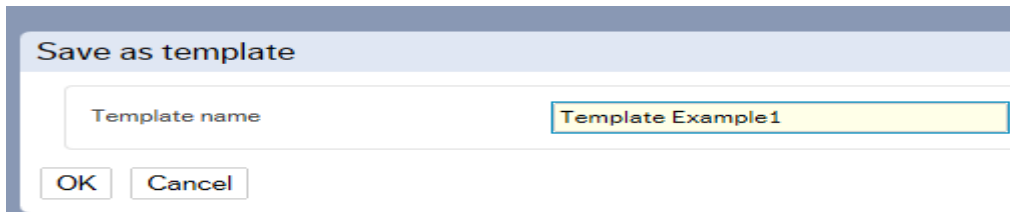
WEBREQ13.1: Creating a Template Requisition

1. **Raise the Requisitioning as per instructions in WEBREQ1 but do not save Requisition.**



2. From the select **Save as template**

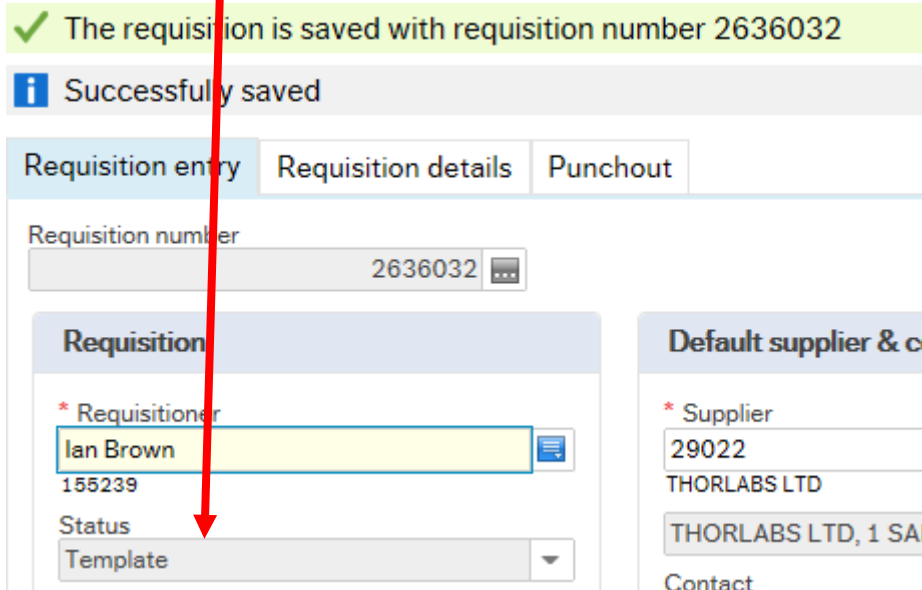
The following screen will appear:



3. Enter the name of the Template

4. Select **OK**

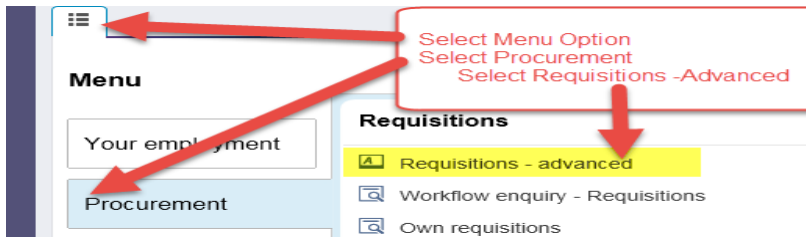
5. The Status of the requisition will change to template and the requisition will be saved but not go for approval.



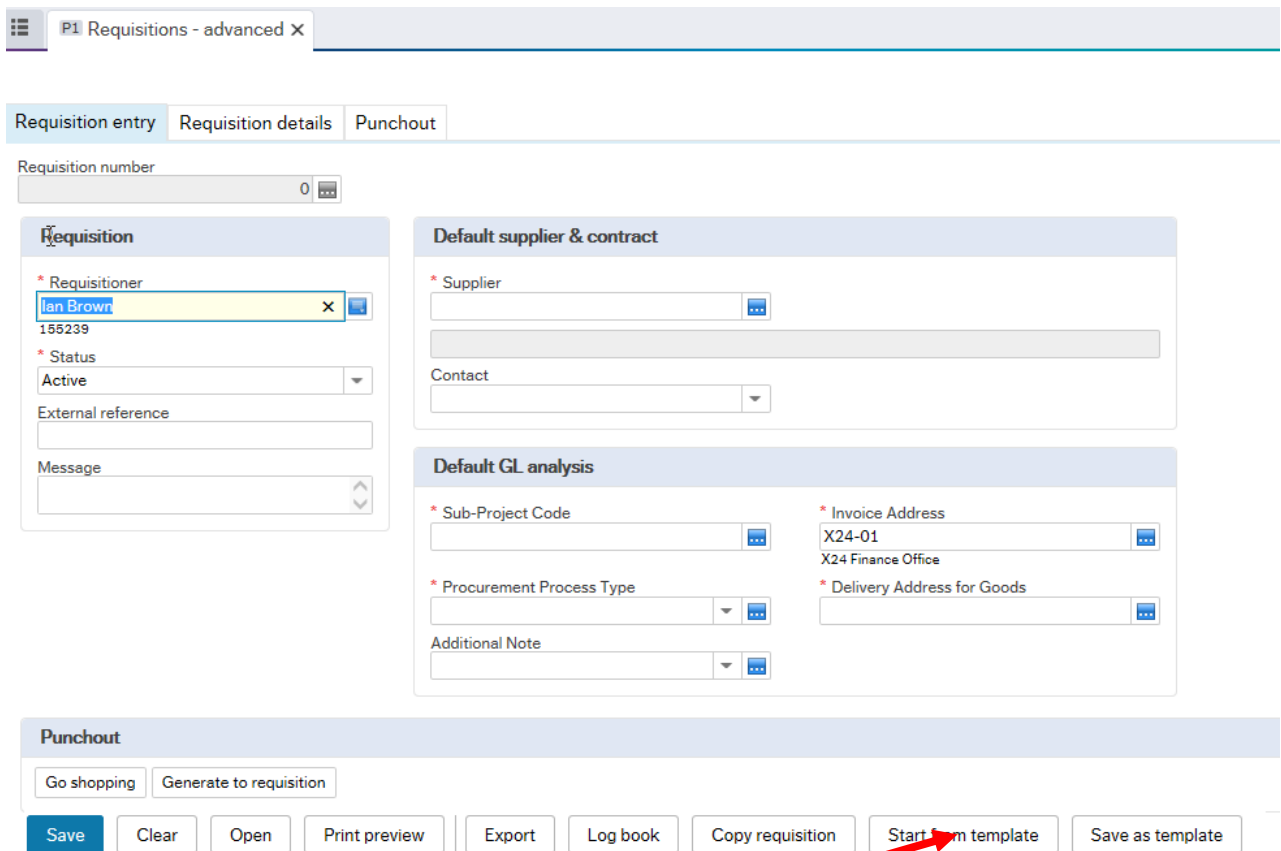
6. Your template has been created.

WEBREQ13.2: Using a Template Requisition

1. To access the Requisitioning screen:



The following screen will appear:



The screenshot shows the 'Requisitions - advanced' screen. At the top, there is a breadcrumb trail: 'P1 Requisitions - advanced x'. Below this, there are three tabs: 'Requisition entry', 'Requisition details', and 'Punchout'. The 'Requisition entry' tab is active. The screen is divided into several sections:

- Requisition number:** A text field containing '0'.
- Requisition:** A section with fields for:
 - * Requisitioner: A dropdown menu showing 'Ian Brown'.
 - 155239
 - * Status: A dropdown menu showing 'Active'.
 - External reference: A text field.
 - Message: A text area.
- Default supplier & contract:** A section with fields for:
 - * Supplier: A dropdown menu.
 - Contact: A dropdown menu.
- Default GL analysis:** A section with fields for:
 - * Sub-Project Code: A dropdown menu.
 - * Invoice Address: A dropdown menu showing 'X24-01' and 'X24 Finance Office'.
 - * Procurement Process Type: A dropdown menu.
 - * Delivery Address for Goods: A dropdown menu.
 - Additional Note: A dropdown menu.

At the bottom, there is a 'Punchout' section with buttons: 'Go shopping', 'Generate to requisition', 'Save', 'Clear', 'Open', 'Print preview', 'Export', 'Log book', 'Copy requisition', 'Start from template', and 'Save as template'. A red arrow points from the 'Start from template' button to a yellow box below.

1. From the **Tools Menu** select

Start from template

. The following screen will appear:

Value lookup

Search criteria

Advanced

Search

Requisition number	Contact Name	Number type	
2002234	Supplies Team	RQ	IAN
2453537	Bottomline	RQ	IAN
2636032	Template Example1	RQ	IAN

Close

- Click once on the required Requisition, which will then populate the details onto the screen.
- Check or amend any details of the requisition as required.

Changes on requisition 2636033 have been saved

Requisition entry Requisition details Punchout

Requisition number 2636033

Requisition

* Requisitioner
Ian Brown
155239

* Status
Active

Default supplier & contract

* Supplier
29022
THORLABS LTD
THORLABS LTD, 1 SAINT T

- To Save the Requisition Click on the Save button at the bottom of the screen

Save Clear Open Print preview Export Log book Copy requisition Start from template Save as template

Once saved the user will get a requisition number. This will then go for approval.

Changes on requisition 2636033 have been saved

Requisition entry Requisition details Punchout

Requisition number 2636033

Requisition

* Requisitioner
Ian Brown
155239

* Status
Active


Default supplier & contract

* Supplier
29022
THORLABS LTD
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Any errors see details and amend accordingly



WEBREQ13 – Template Requisitions
Agresso 564
Version 2.0
Updated – July 2017

1.  Please correct the following:

- **Delivery Address for Goods:** This field must contain a value.