

## **Did you know that there are three ways to create requisitions in Escape?**

- 1. Create a New Requisition**
- 2. Copy an Existing Requisition**
- 3. Create a Requisition Template**

### **Using Requisition Templates**

The software includes the ability to create templates for Vendor requisitions. There are two types of templates:

**Personal Templates** – All users can create personal templates. This type of template can only be seen by the user that created it. It cannot be submitted and will not appear on requisition reports (although you can run a snapshot). You can edit and delete your own templates.

**Organization Templates** – Only users with specific user-based permissions can create and modify these templates, but all users with the appropriate department permissions can see and use them.

The templates have a unique prefix and sequence. The prefix is TMPL-, followed by a sequence that increments for all templates. In other words, personal and organization templates do not have separate sequences.

To help you identify the type of template, the Status column on the list will display either “Personal Template” or “Organization Template” as appropriate.

### **How to Create a Template:**

1. Copy a requisition that contains the information you want in your template. This is just like a “regular” copy, with the same logic for which fields to copy, how to handle accounts, and a history record documenting the requisition number from which you copied. Note that departments cannot share templates because the Department field is automatically copied as read-only.
2. Make changes to the template if desired.
3. Click the Save as Organization Template or Save as Personal Template task, whichever is appropriate.

### **Copying Templates**

1. On the search page, change the Template Reqs parameter to All, Personal, or Organization.
2. Click GO to get a list of templates. (Your list will contain ONLY templates as specified.)
3. Copy the desired template. The Requisitioner and Location will default to your user setup.
4. Process the requisition as usual.

***NOTE: On the Escape home page there is a Basic APY User Training Guide available. This guide has basic APY User information and is a great resource document.***