# Creating Templates in IRIS

OPPM Job Aid

OPPM
Office of Procurement and
Property Management

## Table of Contents

## Introduction

Many tasks in IRIS involve doing the same type of transaction repeatedly. This process can be made more efficient by creating a template for that type of transaction.
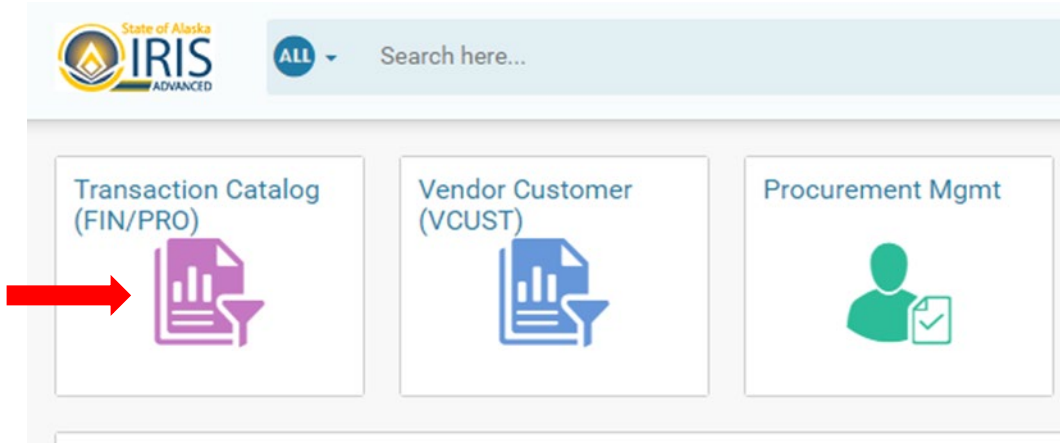
This guide will demonstrate how to create a template for FDs, but the same process can be used to make template for other types of transactions.

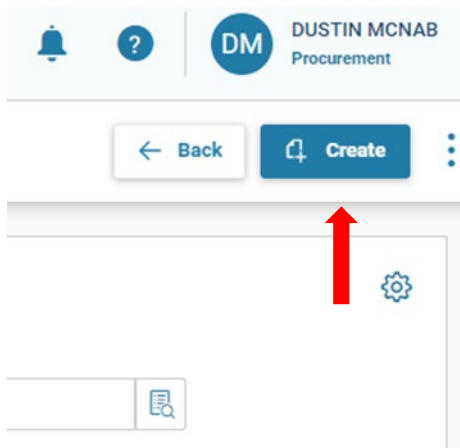## Creating a Template in IRIS

Click on your name and change your Role to "Procurement."
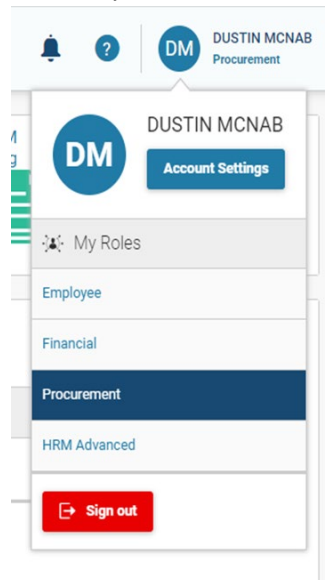
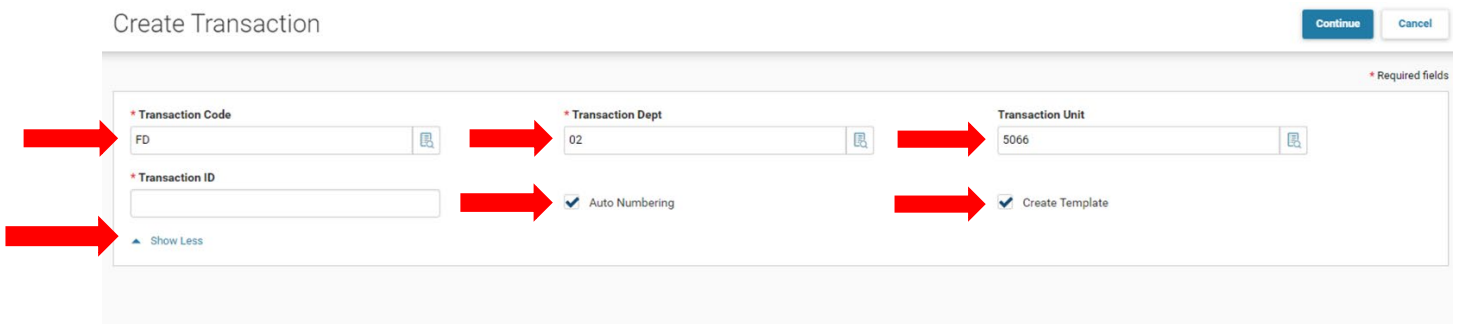Select "Transaction Catalog."



Click "create."



Enter the type of transaction you're creating in 'Transaction code'.

Enter your department number, unit number, and check auto numbering.

Click 'show more' and check 'Create Template'.

Enter the standard language you'll use multiple times for these transactions.



Select the standard method of code for the type of FD you create.



Enter any additional information needed for the FD

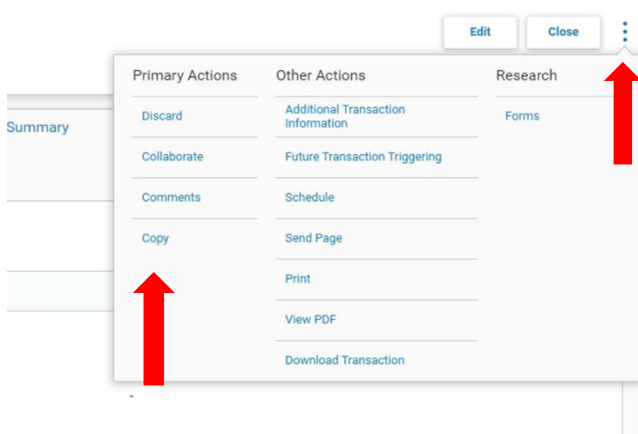

Click 'Save' at the top of the page

Click the star to bookmark and name the template
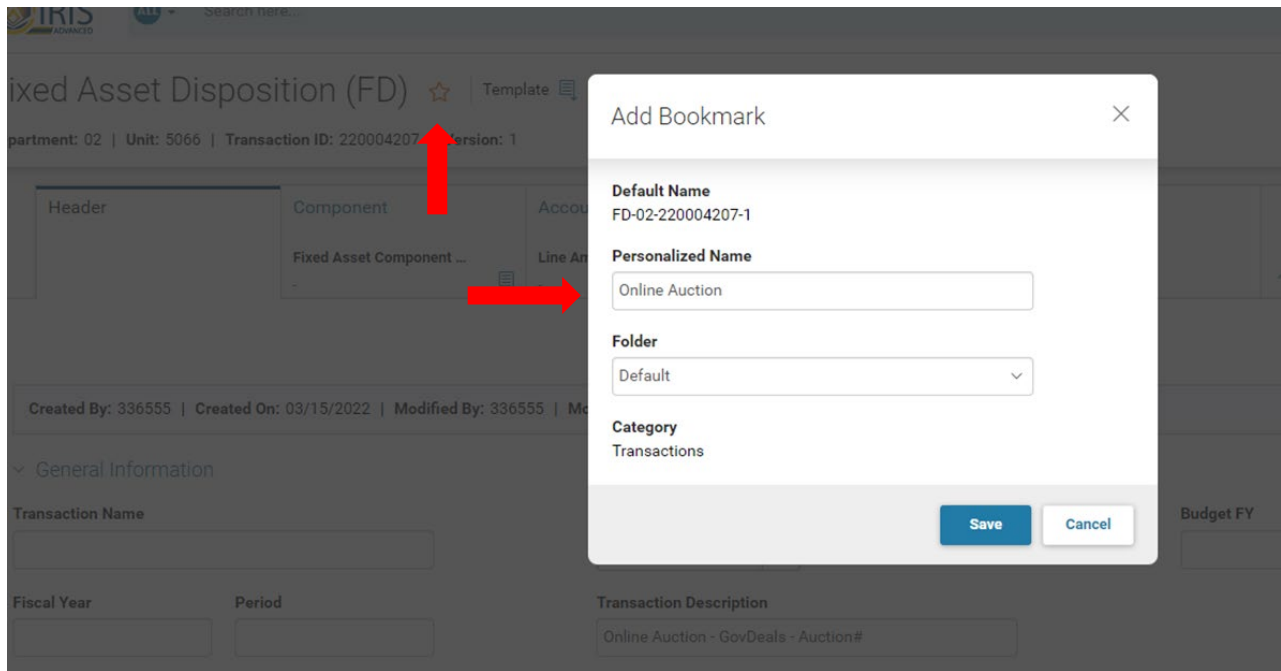


From your home screen, click the blue star
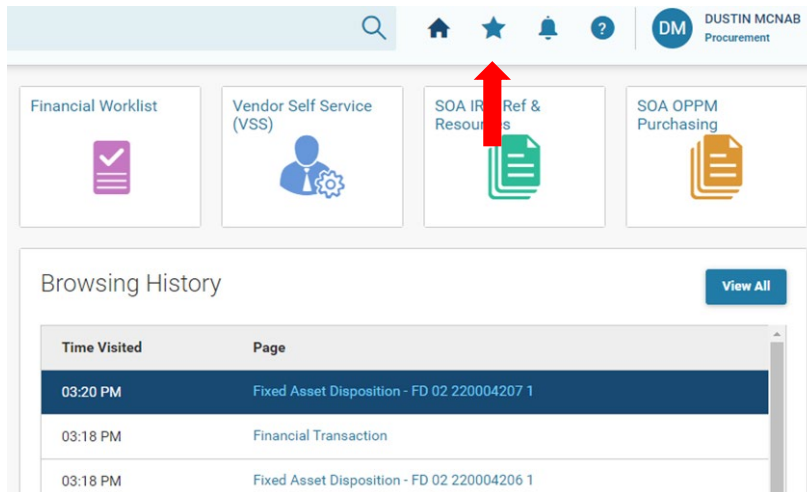


Click the 3-dot menu and select 'copy'

Enter your department number, unit, and check 'auto numbering'



Click 'Copy Transaction' and continue with the transaction as normal