

Creating Templates in IRIS

OPPM Job Aid



OPPM
Office of Procurement and
Property Management

Table of Contents

Introduction.....	1
Creating a Template in IRIS	1

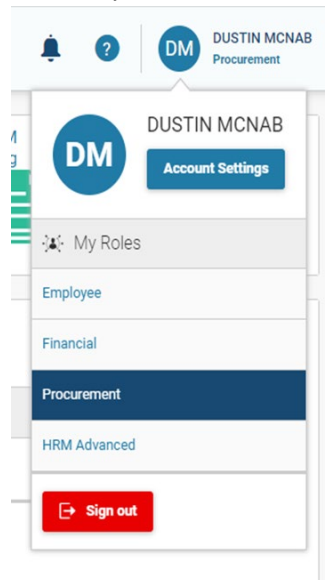
Introduction

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.

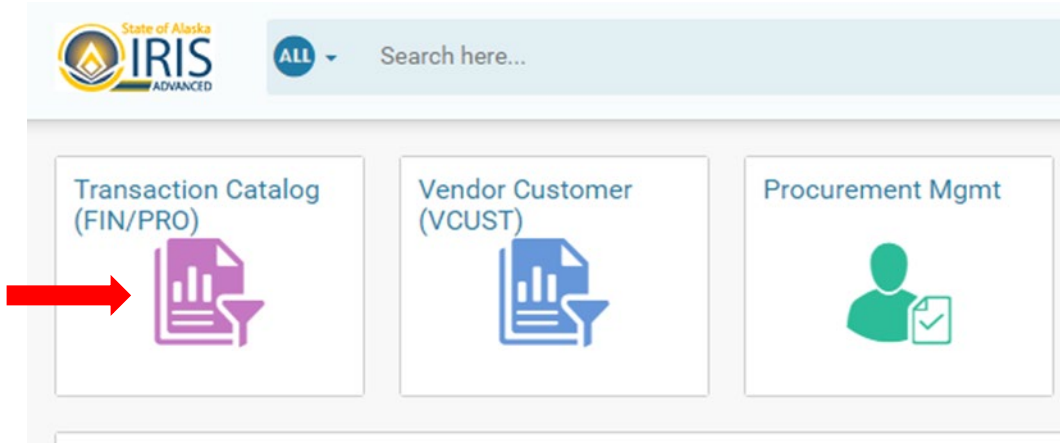
This guide will demonstrate how to create a template for FDs, but the same process can be used to make template for other types of transactions.

Creating a Template in IRIS

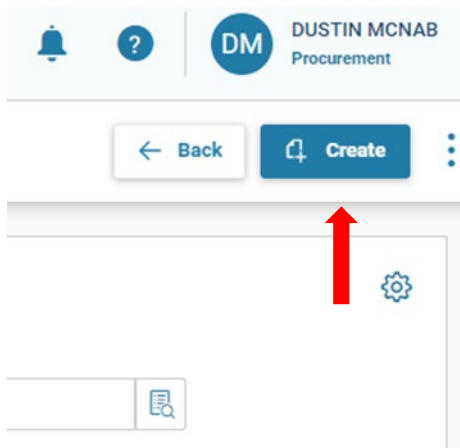
Click on your name and change your Role to “Procurement.”



Select "Transaction Catalog."



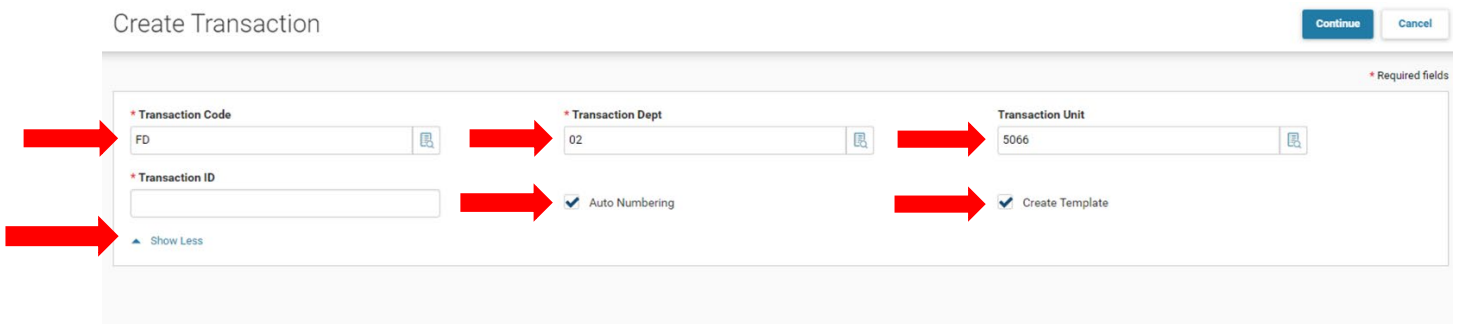
Click "create."



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.

Fixed Asset Disposition (FD) ☆ | Template

Save Save & Close

Department: 02 | Unit: 5066 | Transaction ID: 220004206 | Version: 1

Created By: 336555 | Created On: 03/15/2022 | Modified By: 336555 | Modified On: 03/15/2022

General Information

Transaction Name Record Date Budget FY

Fiscal Year Period Transaction Description

Fixed Asset Number Fixed Asset Description Asset System Number

Asset System Description

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

Disposition

Disposition Date Disposition Method Disposition Code

Selling Price Depreciation Amount Disposition Authority

Disposal Reason Disposal Condition

0/250

Show More

Enter any additional information needed for the FD

Extended Transaction Description

Extended Transaction Description

Selling Price: \$

16/1500

Click 'Save' at the top of the page

IRIS Search here... DUSTIN MCNAB Procurement

Fixed Asset Disposition (FD) ☆ | Template

Department: 02 | Unit: 5066 | Transaction ID: 220004206 | Version: 1

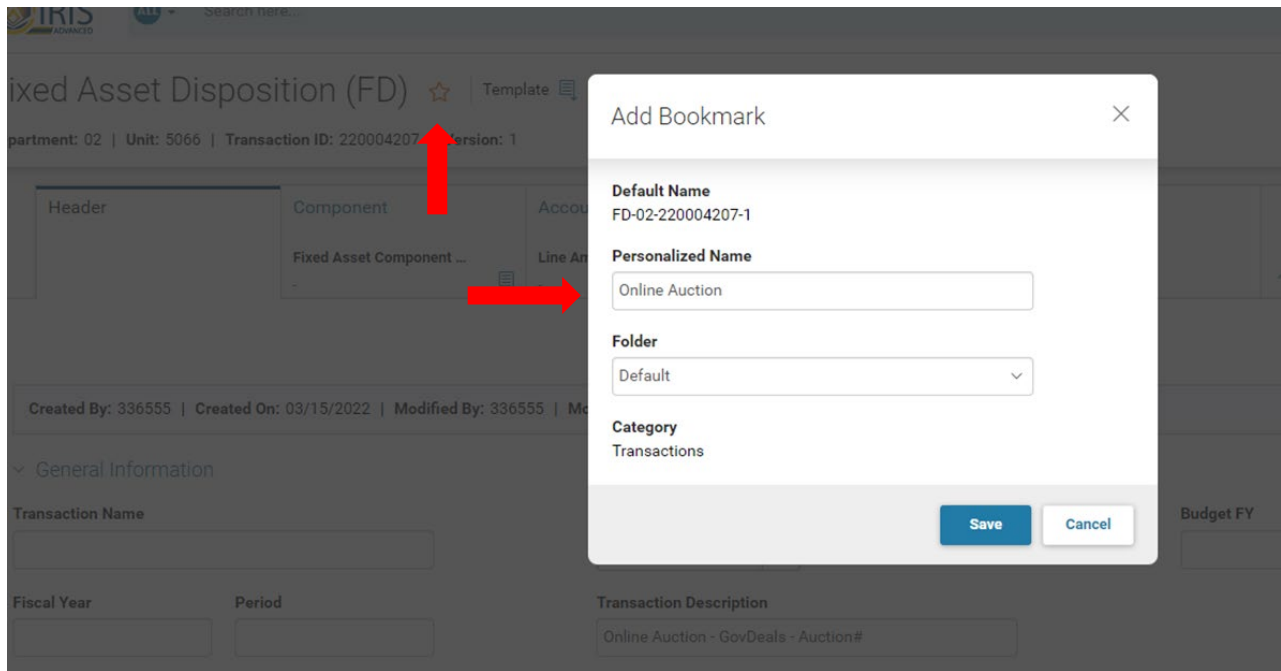
Save Save & Close

Save action completed successfully.

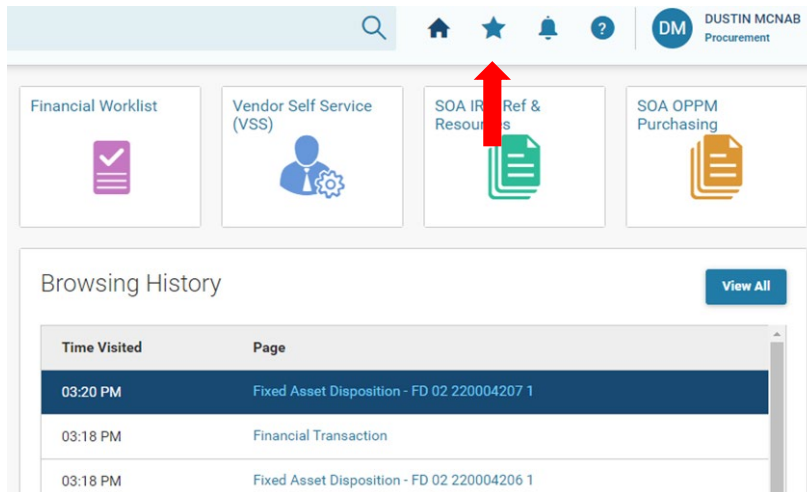
Header	Component	Accounting	Posting	Summary
	Fixed Asset Component ...	Line Amount		

Attachments Auto Apply

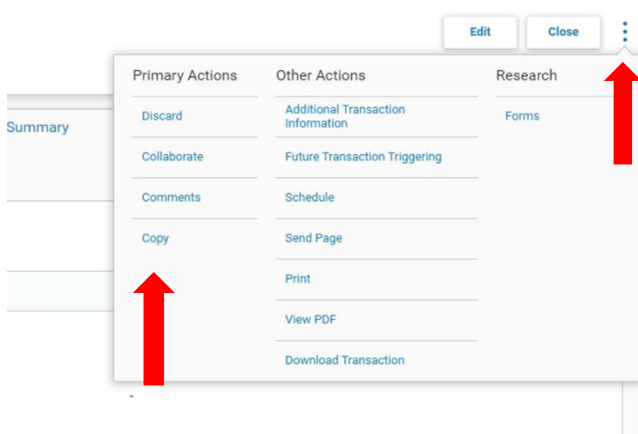
Click the star to bookmark and name the template



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'

Copy Transaction

Source Transaction

Transaction Code
FD

Transaction ID
220003911

Transaction Dept
02

Transaction Unit
5066

Target Transaction

Transaction Code
FD

* Transaction Dept
02

Transaction Unit
5066

* Transaction ID

Auto Numbering

Show More

Copy Transaction Cancel

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