Creating Templates in IRIS

OPPM Job Aid



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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.

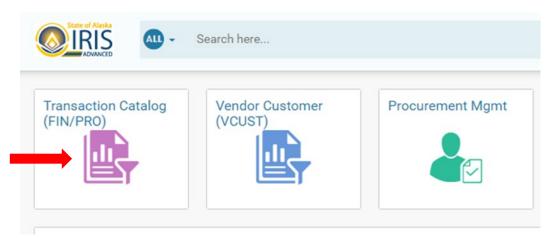
This guide will demonstrate how to create a template for FDs, but the same process can be used to make template for other types of transactions.

Creating a Template in IRIS

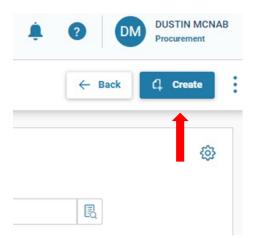
Click on your name and change your Role to "Procurement."

	DUSTIN MCNAB
1	DUSTIN MCNAB
	-(▲)- My Roles
	Employee
	Financial
	Procurement
1	HRM Advanced
	🕞 Sign out

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'.

* Transaction Code		* Transaction Dept		Transaction Unit	*
FD	B	02	R	5066	R
* Transaction ID					
		Auto Numbering		Create Template	
 Show Less 					

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

Fixed Asset Disposition (FD) 😭 Te Separtment: 02 Unit: 5066 Transaction ID: 220004206 Version		🛱 Save Save	& Close
Created By: 336555 Created On: 03/15/2022 Modified By: 3	36555 Modified On: 03/15/2022		
~ General Information			
Transaction Name	Record Date MM/DD/YYYY	Budget FY	
Fiscal Year Period	Transaction Description Online Auction - GovDeals - Auction#		
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.

AUCT			
	B	Sold	~
Depreciation Amount		Disposition Authority	
Disposal Condition			

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

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	(ed Asset Disposi rtment: 02 Unit: 5066 Transar		ate 🗐 📫						I	🖹 Save	Sa	we & Close	l
0	Save action completed successfu	illy.								T			>
	Header	Component Fixed Asset Component	Accounting Line Amount	Posting	Summary	~							
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Click the star to bookmark and name the template

	search here					
	SPOSITION (FD)		Add Bookmark		×	
Header	Component Fixed Asset Compon	Accou	Default Name FD-02-220004207-1 Personalized Name Online Auction			
Created By: 336555 C	reated On: 03/15/2022 Modi	ied By: 336555 Mc	Folder Default	×		
 General Information Transaction Name 			Category Transactions	Save	Cancel	Budget FY
Fiscal Year	Period		Transaction Description Online Auction - GovDeals - Auction#			

From your home screen, click the blue star

	Q	↑ ★ ♣	DM DUSTIN MCN. Procurement
Financial Worklist	Vendor Self Service (VSS)	SOA IR Ref & Resourt s	SOA OPPM Purchasing
Browsing Histo	Dry		View All
Time Visited	Page		Â
03:20 PM	Fixed Asset Disposition	- FD 02 220004207 1	
03:18 PM	Financial Transaction		
03:18 PM	Fixed Asset Disposition	- FD 02 220004206 1	

Click the 3-dot menu and select 'copy'

			Edit	Close
	Primary Actions	Other Actions	Res	earch
ummary	Discard	Additional Transaction Information	Fo	rms
	Collaborate	Future Transaction Triggering		
	Comments	Schedule		
	Сору	Send Page		
	•	Print		
		View PDF		
		Download Transaction		

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 ID	* Transaction Dept	Transaction Unit 5066	
Show More	Auto Numbering		
		Copy Transaction	Cancel

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