
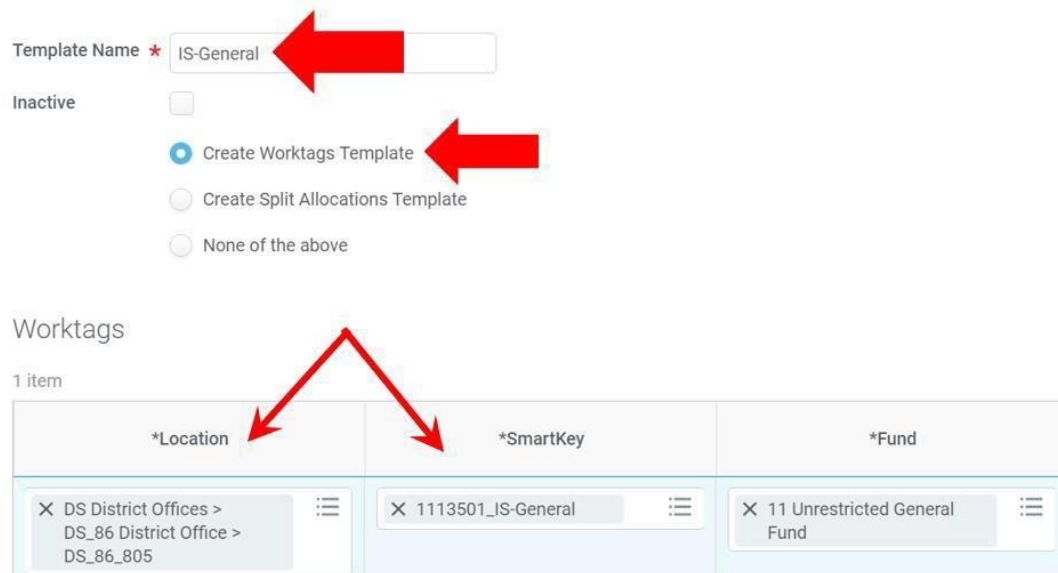


CREATE REQUISITION WORKTAGS TEMPLATE

From the **Home** page:

1. Type **cre req** in the search bar and click **Enter**.
2. Click on the **Create Requisition Worktags Template** link.
3. Type in a **Template Name**.
4. Select the **Create Worktags Template** button.
5. Use the **Prompt** icon  to indicate the **Location** and the appropriate **Smartkey** that you want to be the defaults.



Template Name * IS-General

Inactive ☐

☒ Create Worktags Template

☐ Create Split Allocations Template

☐ None of the above

Worktags

1 item

*Location	*SmartKey	*Fund
<div>× DS District Offices > DS_86 District Office > DS_86_805</div>	<div>× 1113501_IS-General</div>	<div>× 11 Unrestricted General Fund</div>

6. Click .
7. Click .

NOTE: You can now use the saved Templates instead of the Use Default Worktags for every requisition.

USE REQUISITION WORKTAGS TEMPLATE

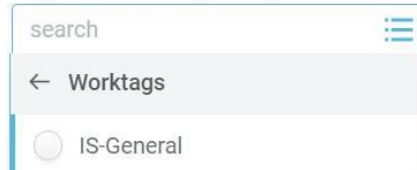
From the **Checkout** page:

1. Click on the **Line Item Defaults** section.

Default Worktags and Splits

Select worktag defaults for all lines on the changes you may have made at the line level.


Copy from Worktags Template

A screenshot of a dropdown menu titled "Copy from Worktags Template". The menu has a search bar at the top with the word "search" and a list icon. Below the search bar, there is a header "← Worktags" with a left arrow. Underneath, there is a radio button followed by the text "IS-General".

search

← Worktags

☐ IS-General

2. Scroll down to the **Default Worktags and Splits** portion of the Line Defaults section.
3. Use the **Prompt** icon  or type to select the appropriate template in the **Copy from Worktags Template** field.
4. The **Use Default Worktags** checkbox will automatically check and worktags will default into the worktags field.
5. If necessary, make changes to the defaulted worktags.