

# Quick Reference Card - Basic

## Change Form Template



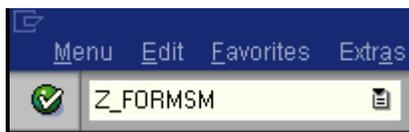
**Process:** This document outlines the procedure for updating an established form used by University staff. Perform this procedure when a department requires an update to the pre-made list of material specific to their area.

**Role:** Authorized Personnel

**Frequency:** When Needed

### BEGINNING

Enter the transaction code in the **Command** field



Z\_FORMSM

### WEB PROCUREMENT FORM TEMPLATE MANAGEMENT

Click on the **Change Template** button



### MAINTAIN CURRENT FROM TEMPLATES

**Form: Number**



Enter the number of the form you want to change or search for it using the Possible Entries icon

Press Enter to pull up the form

Click on the **Change/Display Header Detail** icon



Make needed changes to the following fields:

**Cost Object Nr**

Enter the account number to be charged

**Unloading Point**

Enter the new location where the materials will be delivered

**Recipient**

Enter the new person to receive the materials

Click on the **Edit Form Detail** icon to make changes to the material list on the form



Use the **Item To Insert** section to add materials



Go to PAR Lvl column and change the minimum amount to the required number that must be kept in this location at all times.



Click on the **Insert Row** to open a field in the body of the form to allow comments



The following tools to help you are on the myHelp website.

[Course Material](#) • [Transaction Procedures](#) • [Transaction Simulations](#) • [Online Feedback Form](#)

<http://myhelp.uky.edu/>

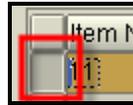
## Quick Reference Card - Basic

# Change Form Template

To add additional material items to the form, repeat the "Material to Insert" steps

### TO DELETE A LINE

Click on the **Selection** icon to the left of the desired line item



Click on the **Delete Row** icon



### SAVE THE UPDATES

After entering all updates, click the Save icon



### CREATE FORM NUMBER: XXXX

Click the Continue icon to close the box



The following tools to help you are on the myHelp website.

[Course Material](#) • [Transaction Procedures](#) • [Transaction Simulations](#) • [Online Feedback Form](#)

<http://myhelp.uky.edu/>