Create Template for Reservation Form

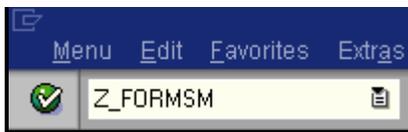**IRIS** Integrated Resource Information System

Process: This document outlines the procedure for creating an inventory form to be used by University staff to list all materials procured directly from the vendors for their specific area. Perform this procedure when a department requires a pre-made list of material specific to their area.	
Role: Authorized Personnel	**Frequency:** When Needed

| BEGINNING	
Enter the transaction code in the **Command** field Menu Edit Favorites Extras Z_FORMSM	Z_FORMSM
WEB PROCUREMENT FORM TEMPLATE MANAGEMENT	
Click on the **Reservation Template** button	Reservation Template
CREATE FORM TEMPLATE FOR MATERIAL PROCUREMENT	
Complete the following fields	
Form Name	Enter the description of the name of the form; Example: Stock Materials
Plant	Enter the responsible plant storage location; UK has two plants: UK00 – Hospital and UK10 – Facilities Service Centers
Supplied By	Enter the Storage Location that will be supplying the reservation; Example: 0002
Department Code	Enter the assigned department number; Example: H3200
Cost Object Type	Enter the description of the cost object type; CC for Cost Center; WBS for Project or Grant account; and ORD for Work Order or Internal Order number
Cost Object Nr	Enter the account number to be charged
Unloading Point	Enter the location where the materials will be delivered
Recipient	Enter the name of who will receive the materials
Click on the **Create** icon to begin entering the materials on the form	

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IRIS
Integrated Resource
Information System

MATERIAL TO INSERT
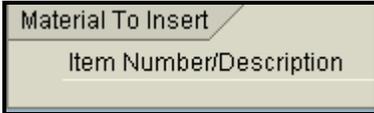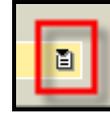
Item Number/Description Material To Insert / Item Number/Description When you select a material number and it populates in the Item Description list, the number is taken out of the "Material to Insert" list to prevent possible duplication in selection	Enter the material number or click on the **Drop-down List** icon to search for the desired item Example: you may need a material that begins with the number 3, but do not want to scroll through hundreds of items, so type the beginning numbers to bring forward the section and then scroll through the options
Go to PAR Lvl column and change the minimum amount to the required number that must be kept in this location at all times	Par Lvl
Click on the **Insert Row** to open a field in the body of the form to allow comments	
To add additional material items to the form, repeat the "Material to Insert" steps	
After entering all items, click the Save icon	

CREATE NEW FORM

Click the Continue icon to close the box	