



Templates / Favorites – Add, Delete, Share

Requesters have the ability to manage personal templates. These users may add item templates, share templates with other requesters, view item details within each template, and copy templates that are created by other users.

Creating Personal Templates

There are several ways to add a template throughout the requisition process: on the Create Requisition page, On the Checkout-Review and Submit page, on the Catalog items page, and through left hand navigation.

Create a Personal Template through the Create Requisition Page

Navigation:



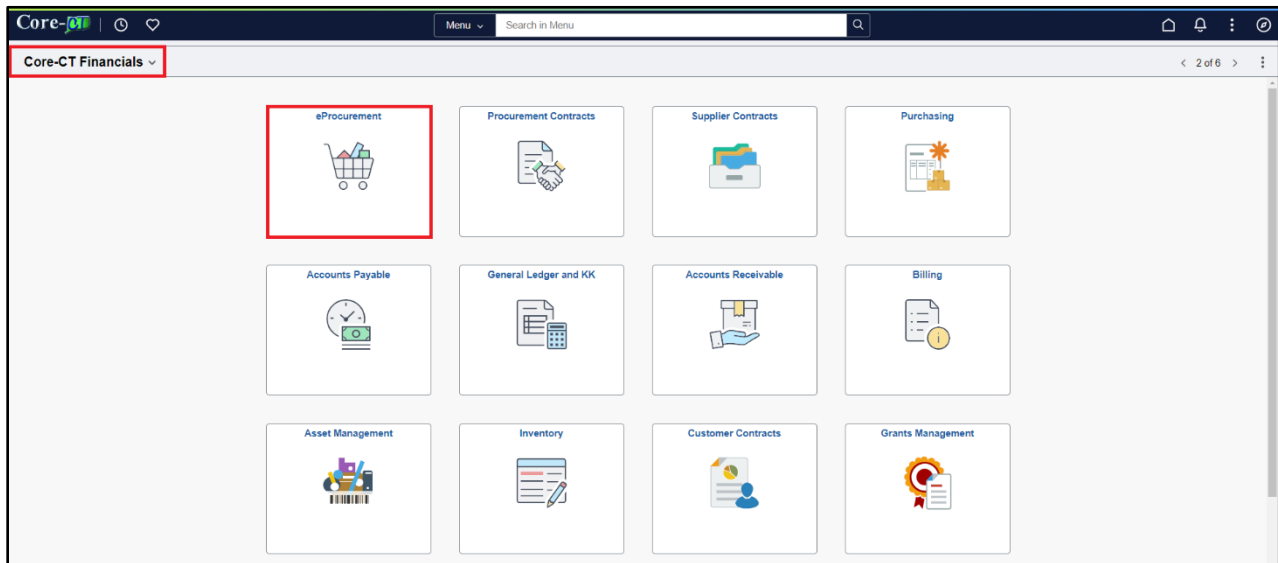
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

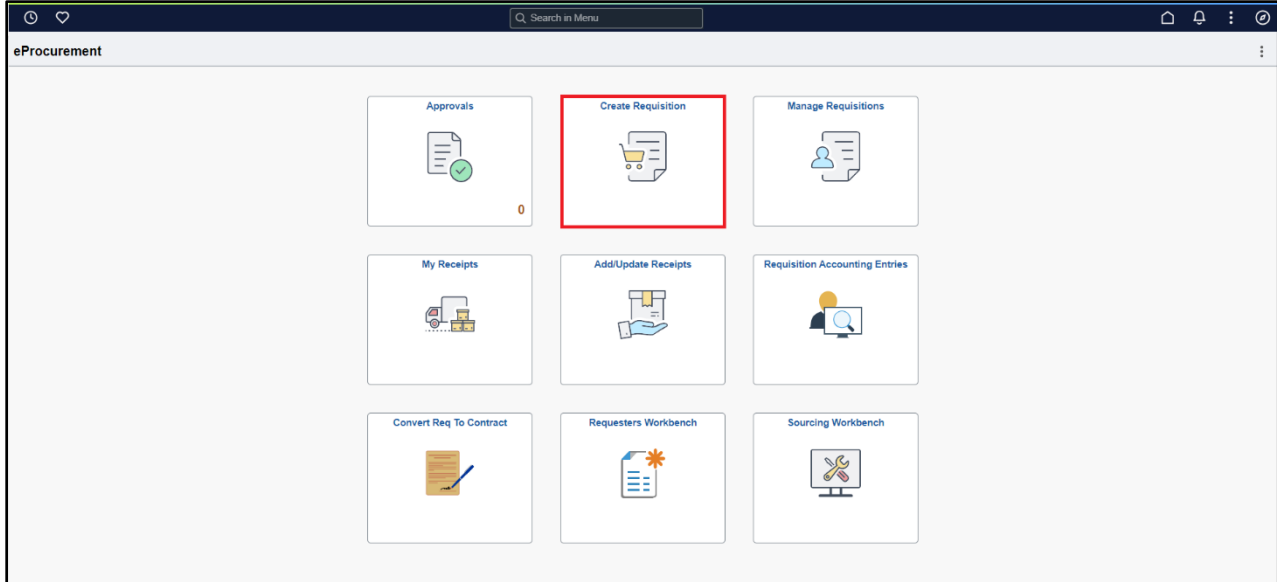
OR

Select **Core-CT Financials**

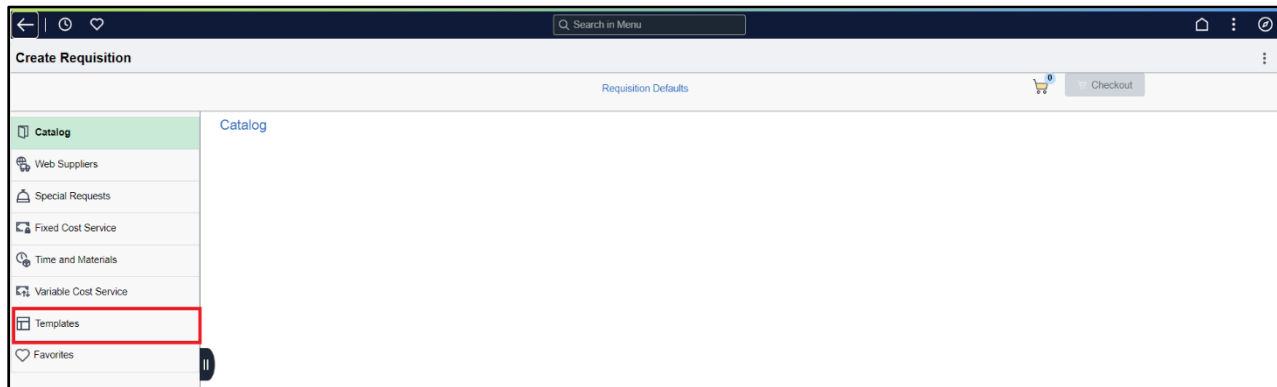
Click the **eProcurement** tile

Click **Create Requisitions** tile

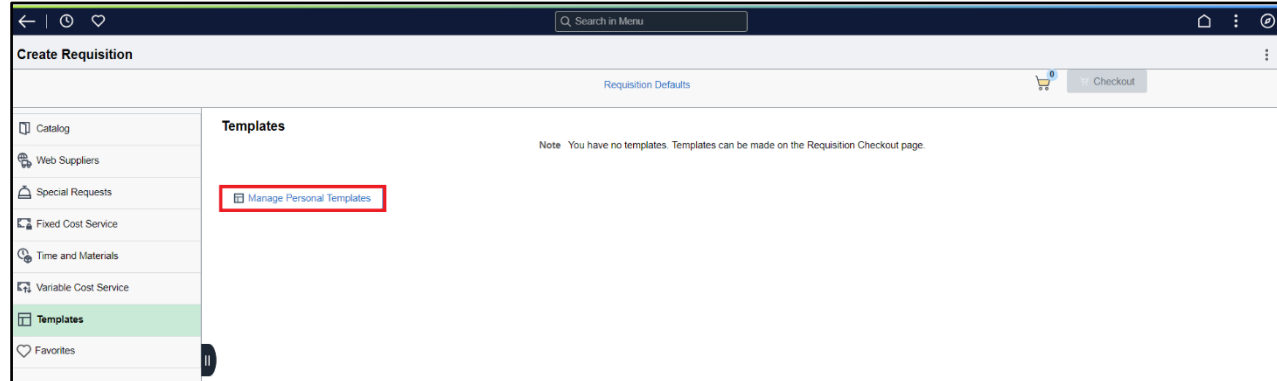




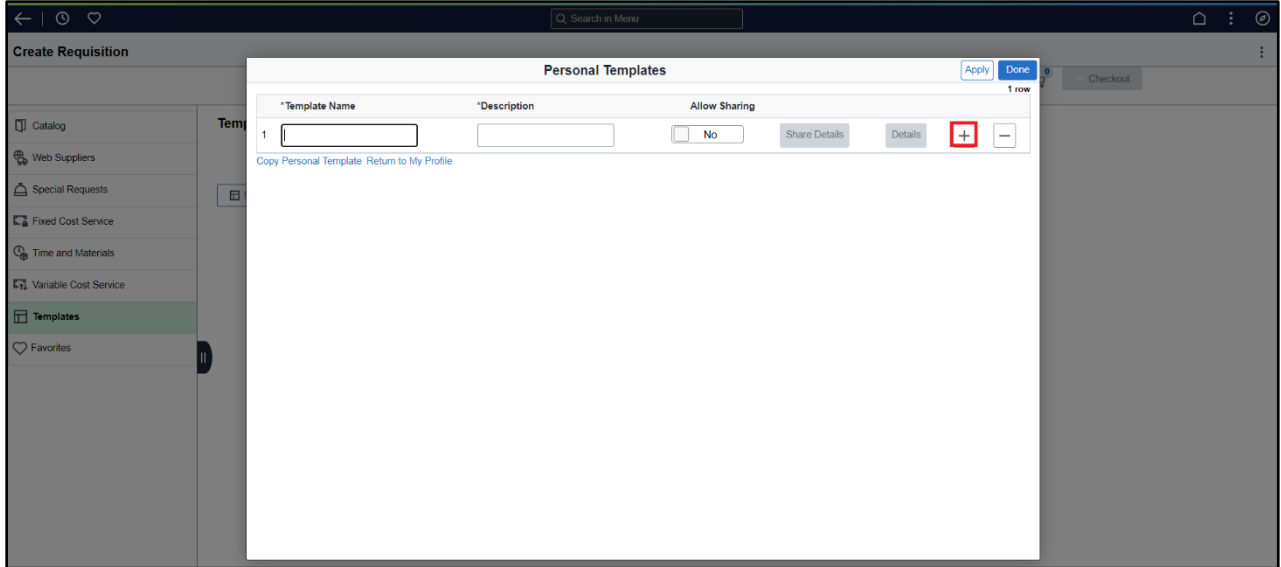
1. Click the **Templates** link



2. Click the **Manage Personal Templates** link



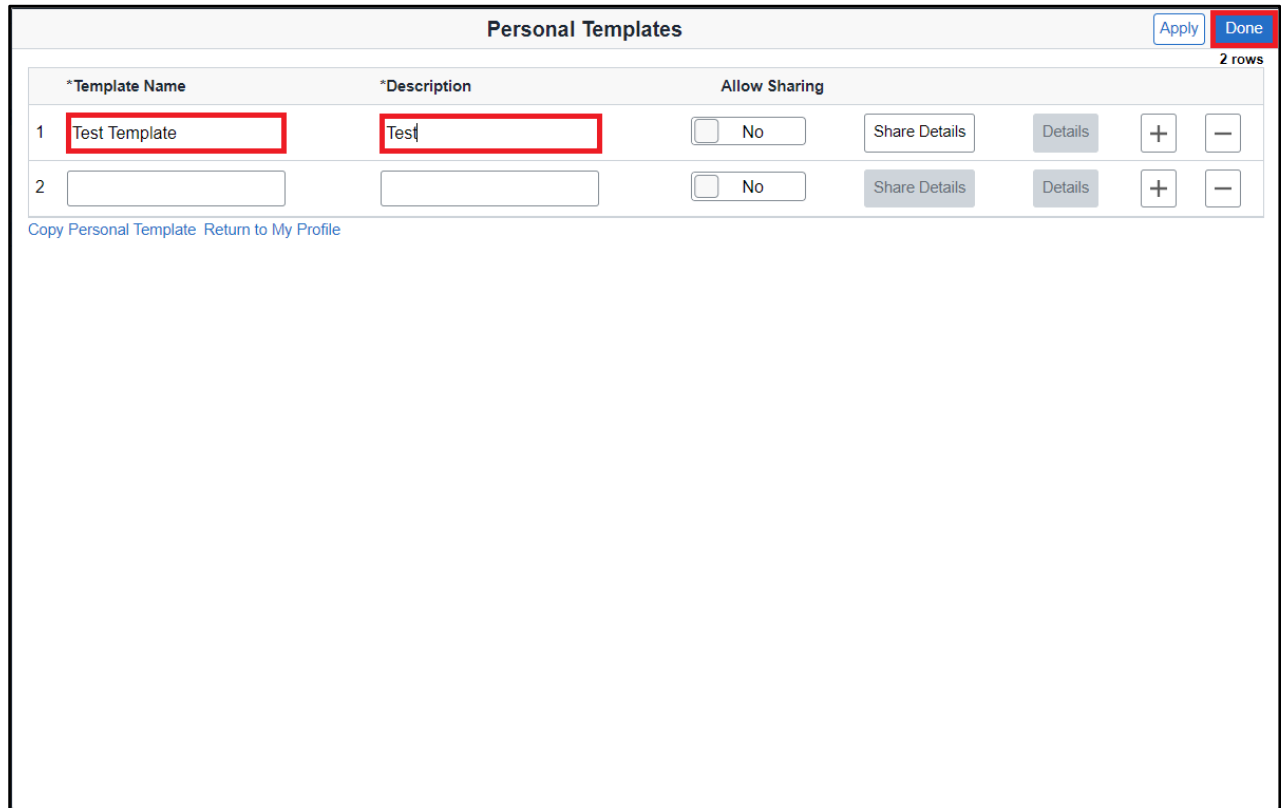
3. Click the  icon to add an additional template



4. Enter the **Template Name** and **Description**

Note: These are required fields

5. Click **Done**





Create a Personal Template through the Checkout – Review and Submit Page

Navigation:



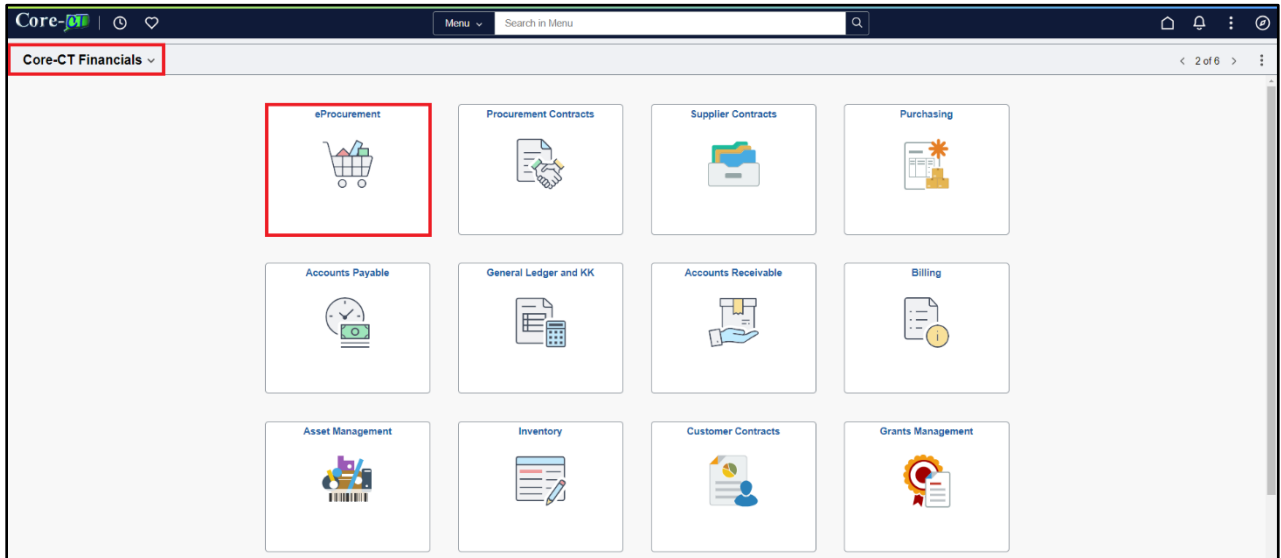
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

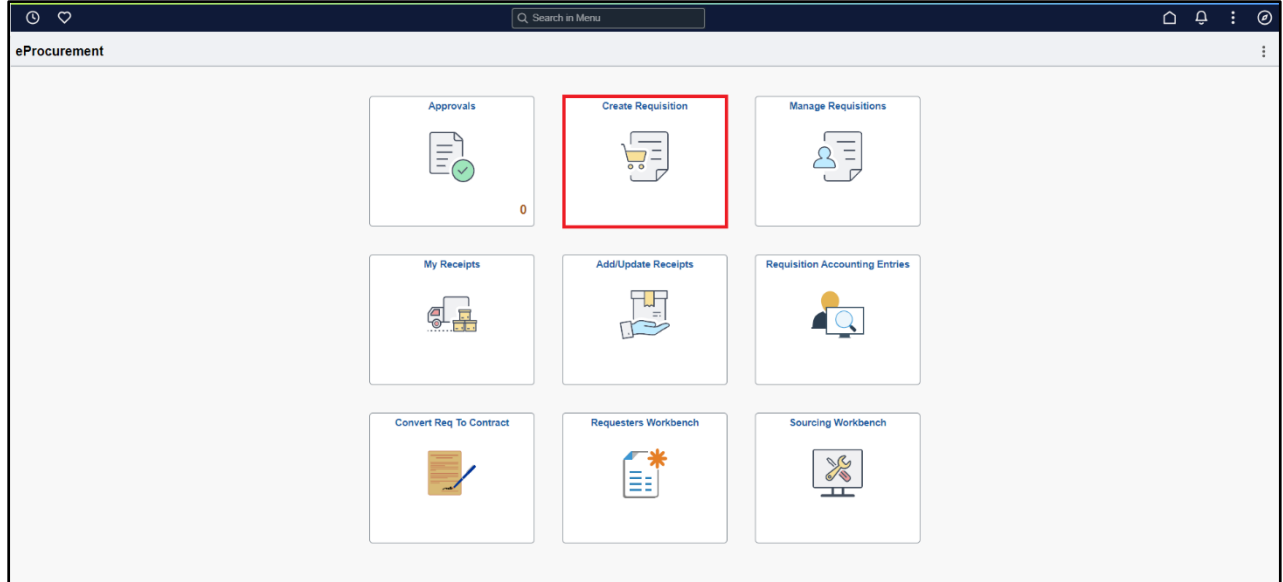
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

Click **Create Requisitions** tile

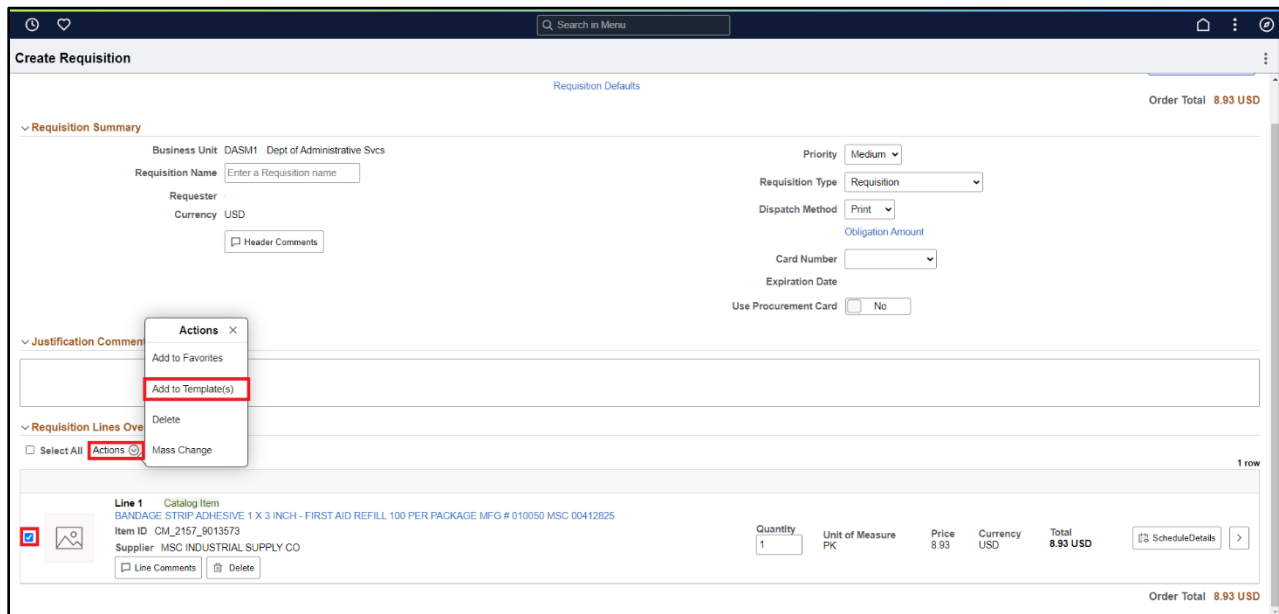




Procedure:

Add items to the cart and then checkout to view the Checkout – Review and Submit page.

1. Select the lines that will be added to the Template
2. Click the **Add to Template(s)** link from the Actions menu





3. Enter the **Template Name**
4. Enter the **Description**
5. Click **OK**

Add Selected Items to Template(s)

Add Selected Items to Template

Add a new template

Template Name

Description



Create a Personal Template through the Catalog Items Page

Navigation:



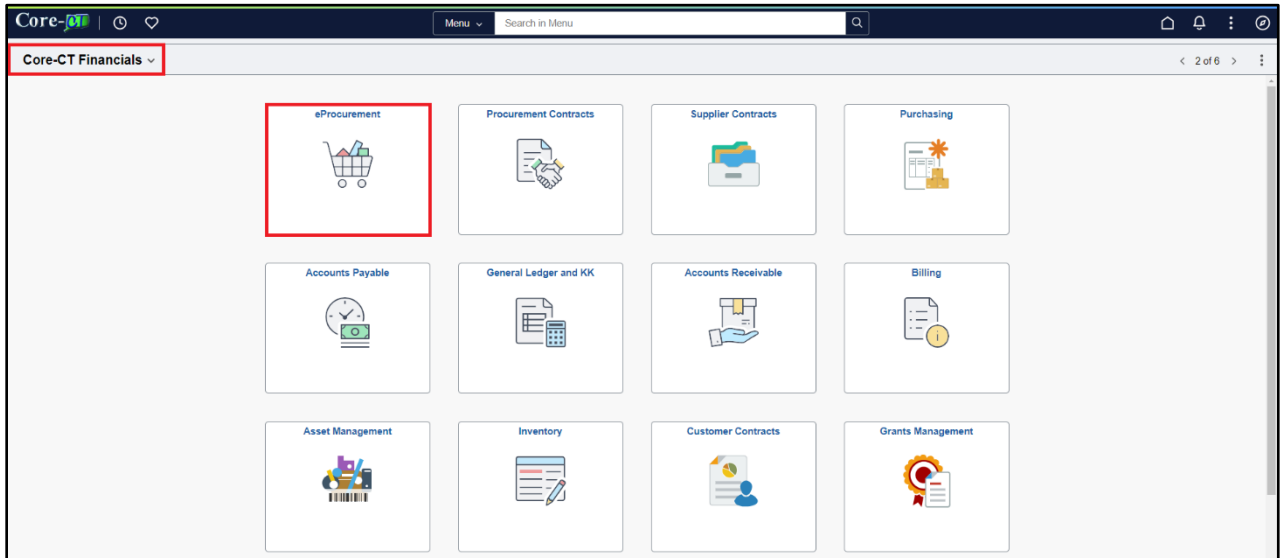
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

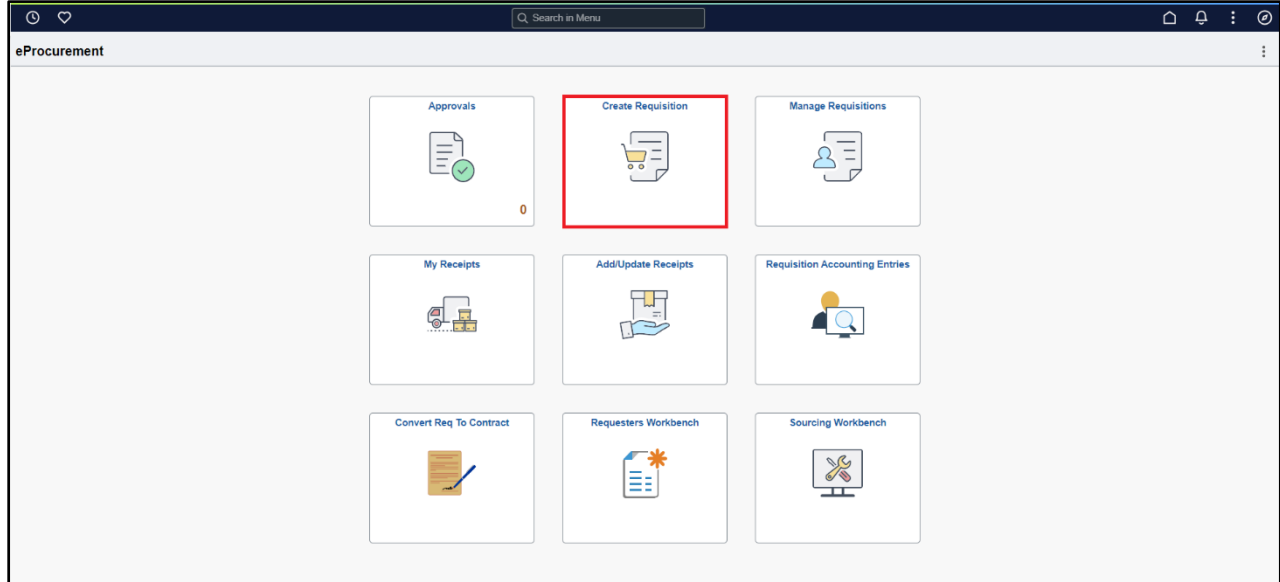
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

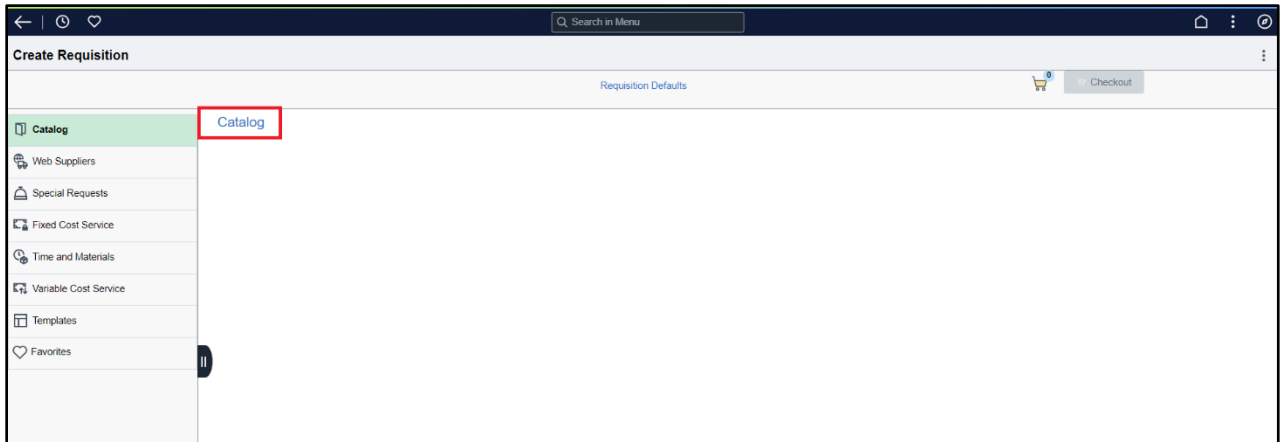
Click **Create Requisitions** tile





Add items to the cart and then checkout to view the Checkout – Review and Submit page.

1. Click the **Catalog** link



2. **Search Catalog**



Advanced Search [Close]

[Clear] [Search]

Search Name [Search Tips](#)

[Save Search Criteria](#)

Advanced Item Search

*Search Contains of the following search fields entered.

Description	<input type="button" value="Contains Any"/>	<input type="text"/>
Manufacturer	<input type="button" value="Contains Any"/>	<input type="text"/>
Manufacturer ID	<input type="button" value="Contains Any"/>	<input type="text"/>
Supplier	<input type="button" value="Contains Any"/>	<input type="text"/>
Supplier ID	<input type="button" value="Contains Any"/>	<input type="text"/>
Item ID	<input type="button" value="Contains Any"/>	<input type="text"/>
UPN ID	<input type="button" value="Equals"/>	<input type="text"/>
Category ID	<input type="button" value="Contains Any"/>	<input type="text"/>
Supplier Item ID	<input type="button" value="Contains Any"/>	<input type="text"/>
Manufacturer Item ID	<input type="button" value="Contains Any"/>	<input type="text"/>
Category	<input type="button" value="Contains Any"/>	<input type="text"/>

- 3. Select **item**
 - a. Click the arrow on the right of the line, and click the Add to **Templates** button



← | 🏠 | ❤️ | 🔍 Search in Menu

Create Requisition 🛒 Checkout

Requestion Defaults

ePro Home Items 1 through 7 of 7

Items Sort By Description

CM_2157_4412100 ✔ Contract ACCORDION EXPANDING FILE POCKET - LEGAL - 8.50 INCH X 14 INC Supplier W B MASON COMPANY INC ⭐ Preferred Supplier	\$26.53 Box -🛒 Add to Cart	Supplier ID 000010334 Supplier Item ID UNV15242 Manufacturer ID WB MASON Manufacturer WB MASON Mfg Item ID UNV15242	>
CM_2157_4412100 ✔ Contract ACCORDION EXPANDING FILE POCKET - LEGAL - 8.50 INCH X 14 INC Supplier SUBURBAN STATIONERS INC	\$54.17 Box -🛒 Add to Cart	Supplier ID 000010009 Supplier Item ID BSN65793 Manufacturer ID BUSINESS SOURCE Manufacturer BUSINESS SOURCE Mfg Item ID BSN65793	>
CM_2157_1650952 ✔ Contract HEAVY-DUTY ACCORDION FILES WITHOUT FLAP - LETTER - 8.50 INCH Supplier W B MASON COMPANY INC ⭐ Preferred Supplier	\$12.22 Each -🛒 Add to Cart	Supplier ID 000010334 Supplier Item ID UNV13920 Manufacturer ID WB MASON Manufacturer WB MASON Mfg Item ID UNV13920	>
CM_2157_1650951 ✔ Contract HEAVY-DUTY ACCORDION FILES WITHOUT FLAP - LETTER - 8.50 INCH Supplier W B MASON COMPANY INC ⭐ Preferred Supplier	\$22.11 Each -🛒 Add to Cart	Supplier ID 000010334 Supplier Item ID UNV13910 Manufacturer ID WB MASON Manufacturer WB MASON Mfg Item ID UNV13910	>
CM_2157_1650953 ✔ Contract HEAVY-DUTY ACCORDION FILES WITHOUT FLAP - LETTER - 8.50 INCH Supplier SUBURBAN STATIONERS INC	\$16.88 Each -🛒 Add to Cart	Supplier ID 000010009 Supplier Item ID BSN2955 Manufacturer ID SPARCO PRODUCTS Manufacturer SPARCO PRODUCTS Mfg Item ID BSN2955	>

← | 🏠 | ❤️ | 🔍 Search in Menu

Create Requisition 🛒 Checkout

Requestion Defaults

Item Details

ACCORDION EXPANDING FILE POCKET - LEGAL - 8.50 INCH X 14 INC

Item ID CM_2157_4412100
 Supplier W B MASON COMPANY INC
 Supplier Item ID UNV15242
 Unit of Measure Box
 Price 26.53 USD
 Item Category Office Equipment and Accessori
 Location MAIN

Attributes
 ⭐ Preferred Supplier

Manufacturer WB MASON
 Manufacturer's Item ID UNV15242
 UPN Type
 UPN ID
 Lead Time 1

BX Add Add to Favorites Add to Template(s)

Other Suppliers

Supplier SUBURBAN STATIONERS INC
 Supplier Item ID BSN65793
 Unit of Measure Box
 Price 54.17 USD US
 Item Category Office Equipment and Accessori
 Location MAIN

Attributes

Manufacturer's Item ID BSN65793
 UPN Type
 UPN ID
 Lead Time 1

BX Add



Managing Personal Templates

Navigation:



Nav Bar

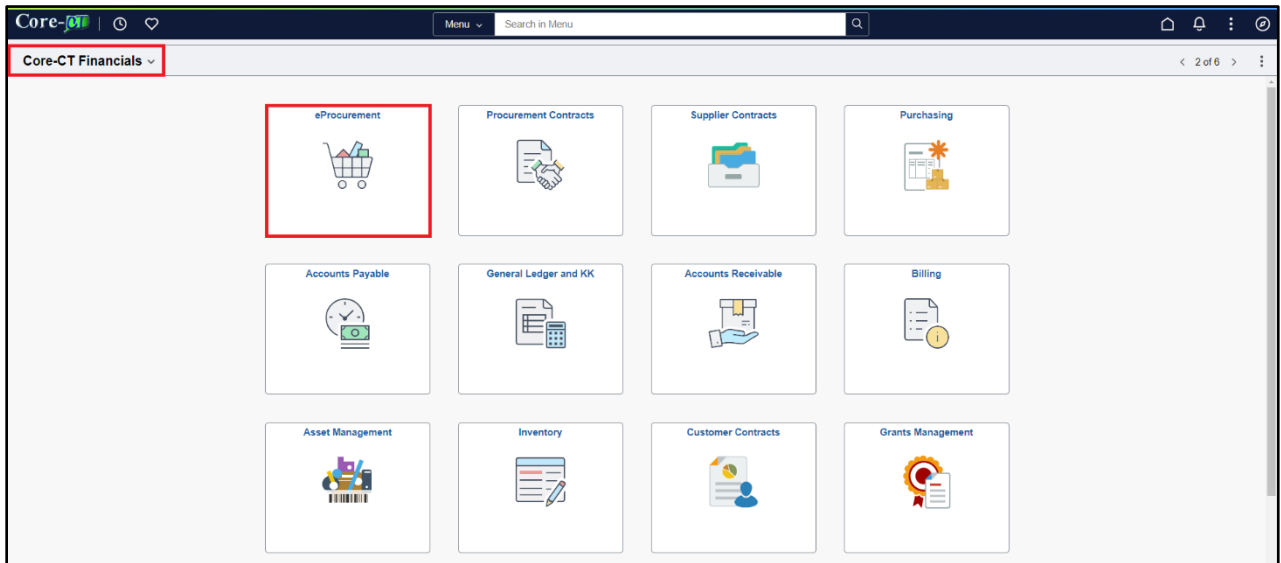
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

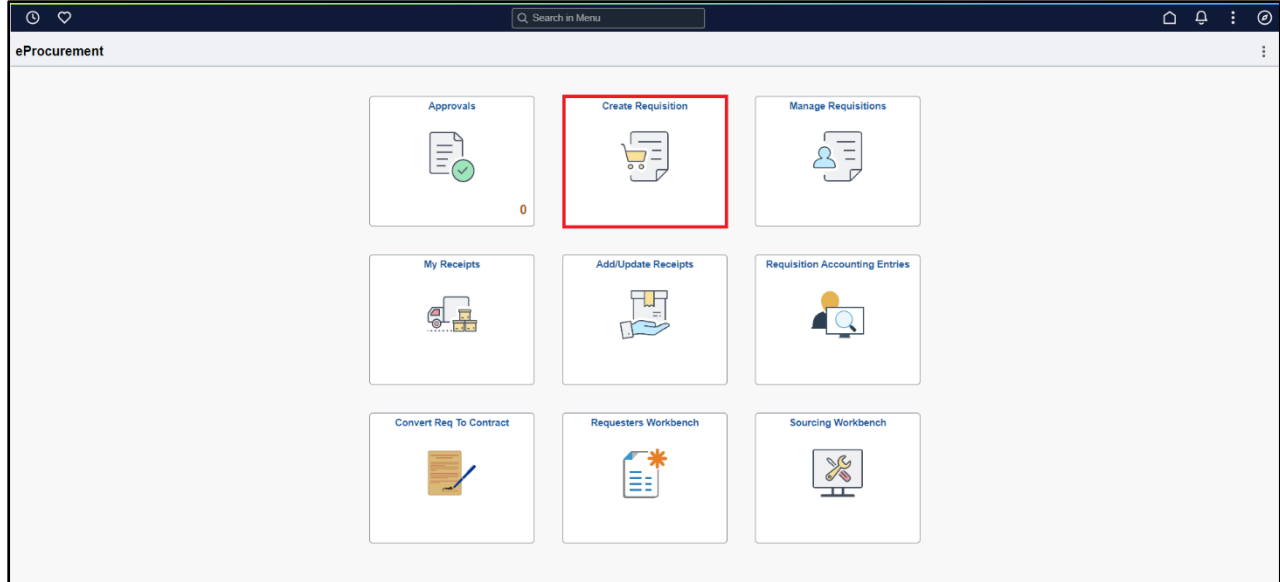
OR

Select **Core-CT Financials**

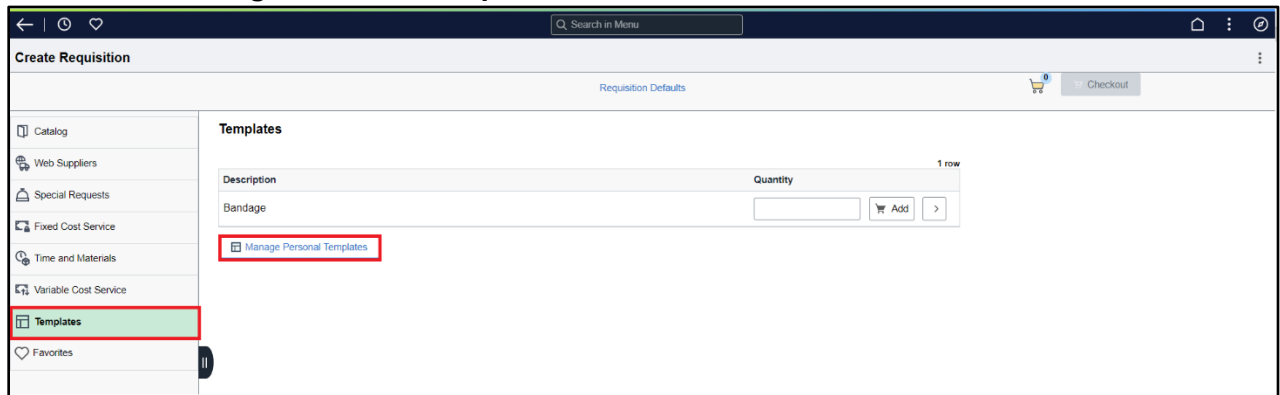
Click the **eProcurement** tile

Click **Create Requisitions** tile





1. Click **Templates** on left hand menu
2. Click **Manage Personal Templates** link



From the **Manage Personal Templates** page, users can add / edit Template Name or add / edit a Description. Both are required fields.

Existing templates will be listed.

1. Update the existing **Template Name**
2. Update the exiting **Template Description**
3. Update the **Share Details** button
4. Update the **Details** button



Personal Templates					Apply	Done
*Template Name	*Description	Allow Sharing			1 row	
1	First Aid	Bandage	<input type="checkbox"/> No	Share Details	Details	+ -

[Copy Personal Template](#) [Return to My Profile](#)

Add / Remove Templates:

1. Click the **Plus** icon to add an additional template
2. Click the **Minus** icon to remove an existing template

Personal Templates					Apply	Done
*Template Name	*Description	Allow Sharing			1 row	
1	First Aid	Bandage	<input type="checkbox"/> No	Share Details	Details	+ -

[Copy Personal Template](#) [Return to My Profile](#)

Allow Sharing:

Users have the ability to share templates with other requesters.

There are two items to note when sharing. These options are accessible from the **Manage Personal Template** page:

- Allow Sharing – checking this box indicates that the template can be copied by other requesters. If it remains unselected, the template cannot be copied.
- Share Details – Select Share with Requesters to share this template with specific requesters.

1. **Allow Sharing** by switching the **Allow Sharing** flag to Yes

Personal Templates					Apply	Done
*Template Name	*Description	Allow Sharing			1 row	
1	First Aid	Bandage	Yes <input type="checkbox"/>	Share Details	Details	+ -

[Copy Personal Template](#) [Return to My Profile](#)

2. Configure **Share Details** by clicking the button



Personal Templates			Apply	Done			
*Template Name	*Description	Allow Sharing	1 row				
1	First Aid	Bandage	Yes <input type="checkbox"/>	Share Details	Details	+	-

[Copy Personal Template](#) [Return to My Profile](#)

- 3. Enter the User ID
- 4. Click **Done**

Share Details		Cancel	Done
Requester			
Template Name	Test Template		
Description	Eyewash		
Share with All Roles and Requesters	<input type="checkbox"/> No		
Role Name ↑↓		Description ↑↓	
1	<input type="text"/>	<input type="text"/>	+ -
User ID ↑↓		Description ↑↓	
1	<input type="text"/>	<input type="text"/>	+ -

- 5. Details- **Details** page displays items in the template



Note: Items can be removed from the page, but not added

Personal Templates						Apply	Done
*Template Name	*Description	Allow Sharing	Share Details	Details	+ -	1 row	
1	Test Template	Eyewash	Yes <input type="checkbox"/>	Share Details	Details	+ -	

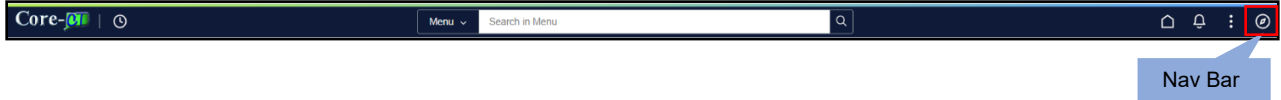
[Copy Personal Template](#) [Return to My Profile](#)

6. Click Done

View Details								Cancel	Done
Requester		Template Name: Test Template		Description: Eyewash					
Item Description	Supplier	Status	Unit of Measure	Price	Currency	Quantity	1 row		
1 EYE WASH REFILL BOTTLE SPERIAN SIZE 32 OUNCE FOR USE WITH PORTABLE EYE WASH STATIONS	NOBLE SUPPLY & LOGISTICS LLC	Active				1.0000	+ -		

Adding / Deleting Favorites

Navigation:



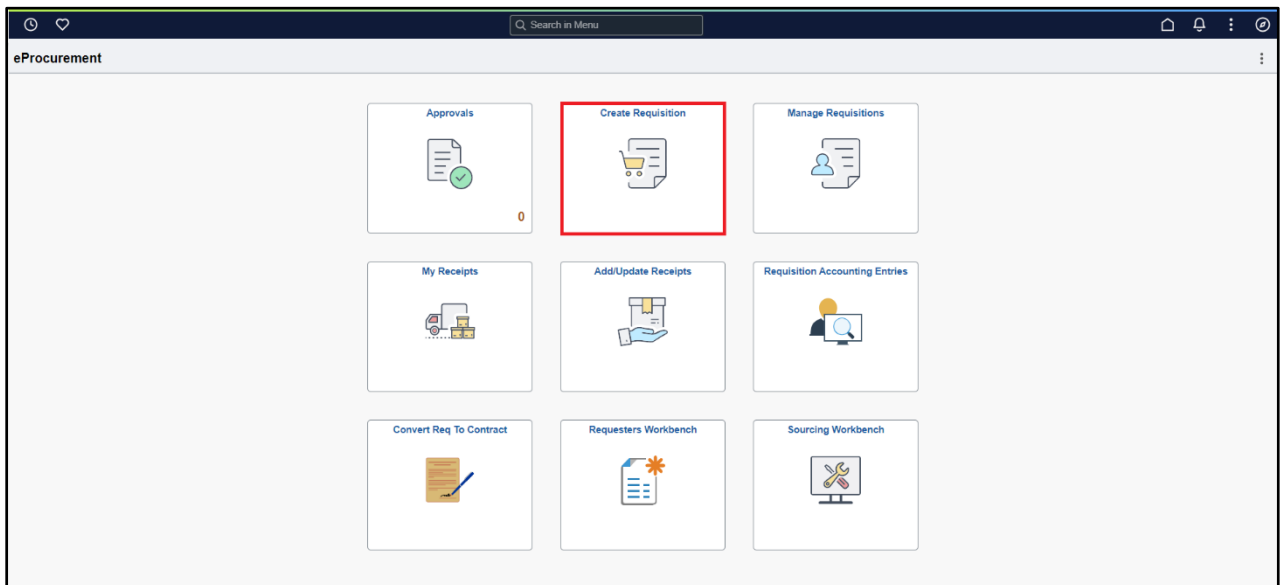
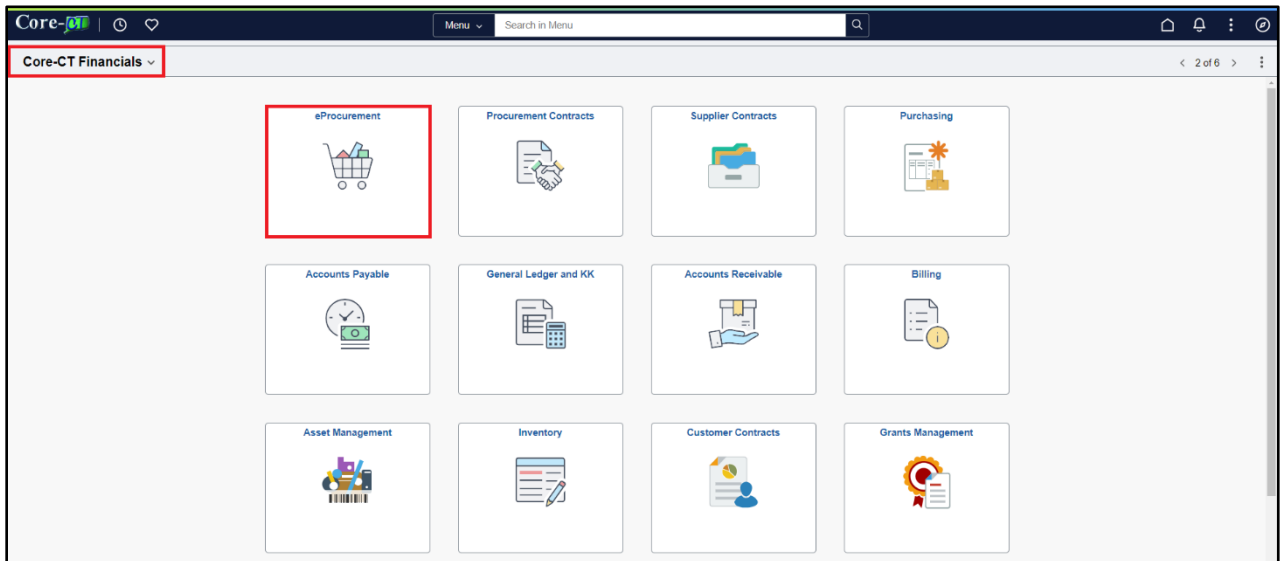
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

OR

Select **Core-CT Financials**

Click the **eProcurement** tile

Click **Create Requisitions** tile

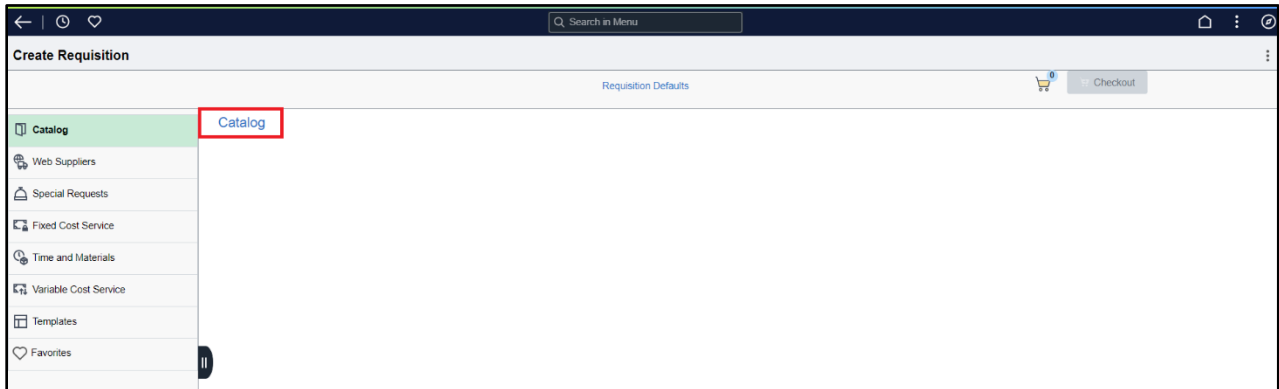




Items can be added to the favorites list during a requisition entry. To add an item to a users' favorites, use the **Catalog Item Search Results Page Review and Submit** page, or Left-hand Navigation.

Adding to Favorites List: Catalog Item Search Results Page

1. Click the **Catalog** and search for an item





Clear Search

Search Name Search Tips

[Save Search Criteria](#)

Advanced Item Search

*Search Contains All of the following search fields entered.

Description	Contains Any	<input type="text"/>
Manufacturer	Contains Any	<input type="text"/>
Manufacturer ID	Contains Any	<input type="text"/>
Supplier	Contains Any	<input type="text"/>
Supplier ID	Contains Any	<input type="text"/>
Item ID	Contains Any	<input type="text"/>
UPN ID	Equals	<input type="text"/>
Category ID	Contains Any	<input type="text"/>
Supplier Item ID	Contains Any	<input type="text"/>
Manufacturer Item ID	Contains Any	<input type="text"/>
Category	Contains Any	<input type="text"/>

2. Select **Item** by clicking the arrow on the right



Create Requisition

Search in Menu

Requisition Defaults

Checkout

Item Category

- Cleaning Equipment and Supply (1007)
- Domestic Appliances and Suppl (88)

Manufacturer Name

- 3M CORPORATION (191)
- SPARTAN CHEMICAL COMPANY INC. (132)
- NEWELL RUBBERMAID (107)
- GOJO INDUSTRIES INC (56)
- NSI INDUSTRIES LLC (49)
- NSS ENTERPRISES INC. (40)
- HOSPECO (38)
- UNGER ENTERPRISES INC (38)
- PROTEAM INC. (37)
- KUTOL PRODUCTS COMPANY (36)

Supplier Name

- C & C JANITORIAL SUPPLIES INC (931)
- BOB BARKER CO INC (41)
- TABB TEXTILES CO INC (25)
- CN WOOD ENVIRO LLC (18)

Item	Price	Supplier	Manufacturer
CM_2157_9014448 #17L GLASS CLEANER AND PROTECTOR 6/2LTRS/CASE 599804	\$ 246.74	C & C JANITORIAL SUPPLIES INC	3M CORPORATION
CM_2157_9014465 #1A GLASS CLEANER 4/ 5GAL/CASE 858439	\$ 158.49	C & C JANITORIAL SUPPLIES INC	3M CORPORATION
CM_2157_9014393 #1L GLASS CLEANER 6/2LTRS/CASE 233579	\$ 142.58	C & C JANITORIAL SUPPLIES INC	3M CORPORATION
CM_2157_9014366 #24A 3-IN-1 FLOOR CLEANER 4/ 5GAL/CASE 858347	\$ 149.47	C & C JANITORIAL SUPPLIES INC	3M CORPORATION
CM_2157_9014347 #24H 3-IN-1 FLOOR CLEANER 6/LTRS/CASE 235535	\$ 159.98	C & C JANITORIAL SUPPLIES INC	3M CORPORATION

3. Click **Add to Favorites** button

Create Requisition

Search in Menu

Requisition Defaults

Checkout

Item Details

#1A GLASS CLEANER 4/ 5GAL/CASE 858439

Item ID: CM_2157_9014465
Supplier: C & C JANITORIAL SUPPLIES INC
Supplier Item ID: 858439
Unit of Measure: Case
Price: 158.49 USD
Item Category: Cleaning Equipment and Supply
Location: MAIN

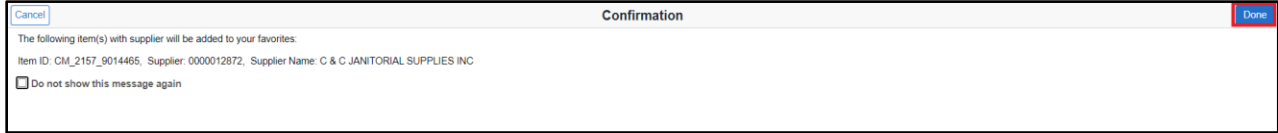
Manufacturer: 3M CORPORATION
Manufacturer's Item ID: 858439
UPN Type
UPN ID
Lead Time: 1

Attributes

- Preferred Supplier

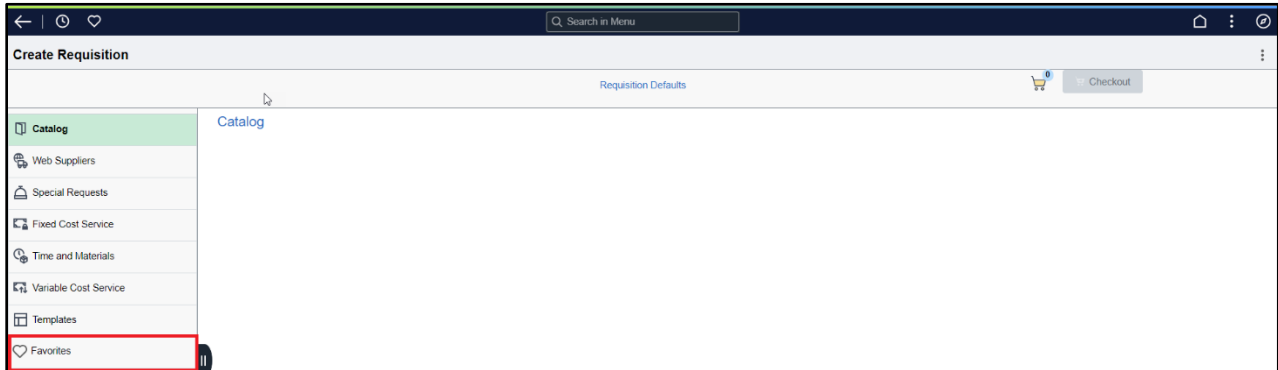
1 CA Q Add **Add to Favorites** Add to Template(s)

4. A message appears to confirm that the item has been added to the favorites list



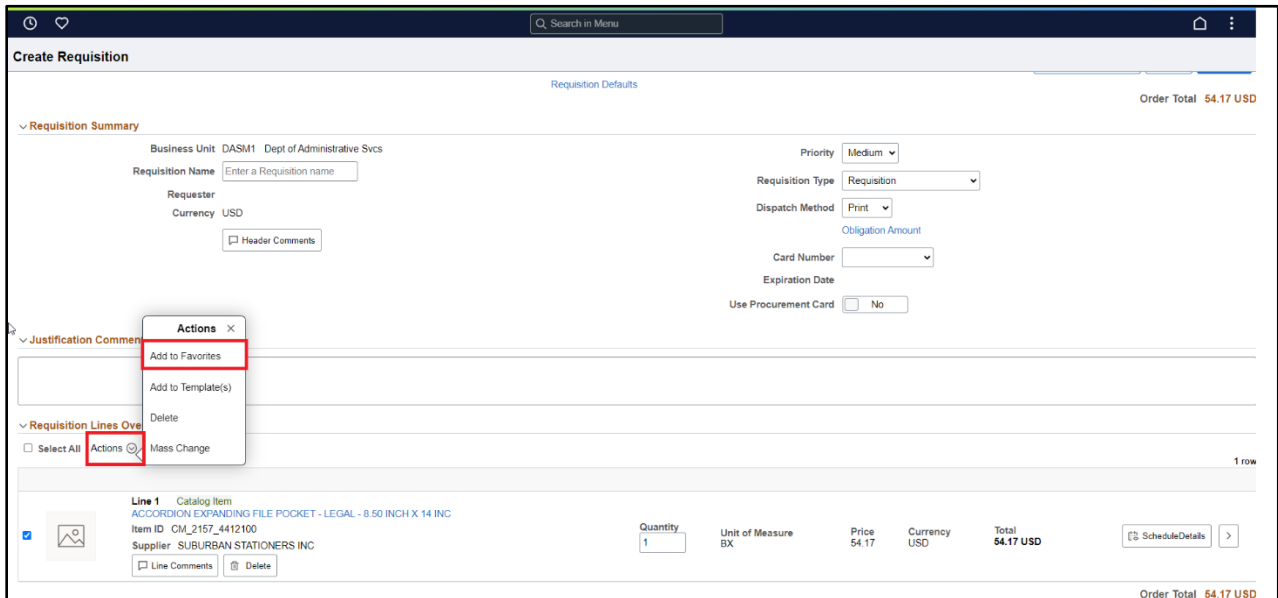
Adding to Favorites List: Left Hand Navigation

1. Click the **Favorites** link on the left-hand menu

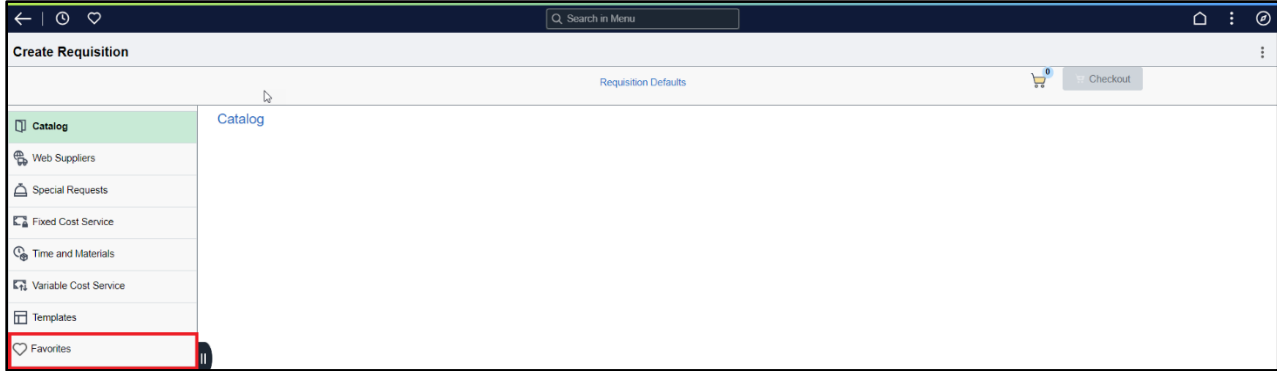


Adding to Favorites List: Checkout – Review and Submit page

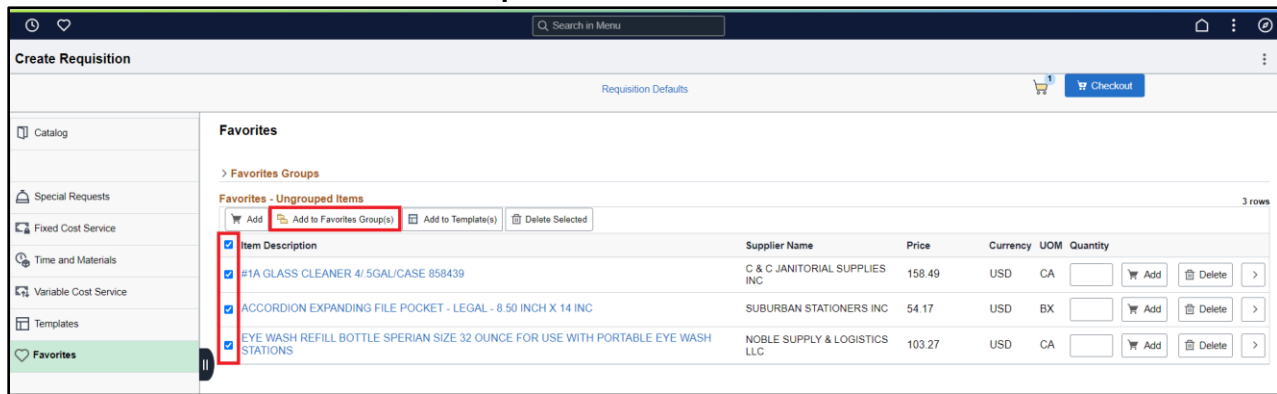
1. Select the items to be added to Favorites
2. Click the **Actions** drop down
3. Click **Add to Favorites**



Adding to Favorites Group:



4. Select **Item(s)** from **Favorites List**
5. Select **Add to Favorites Group**



6. Select **Favorites Group**

OR

Enter **Group Name** and **Description** to create a new favorite group 6.
Click **OK**



Favorites Groups

Add Selected Items

Favorites Groups

	Group Name	Description
<input type="checkbox"/>	Fav Group	Test

Add to a new favorites group

Group Name

Description

Note: When an item is added to a favorites group, it no longer appears as an ungrouped item within the favorites list.

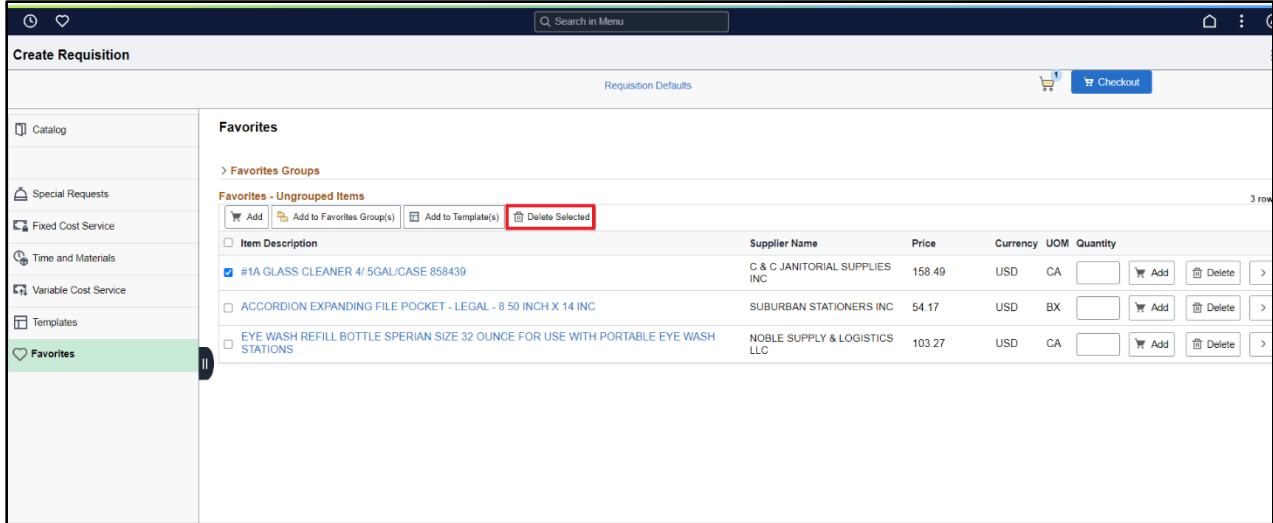
Deleting Items on Favorites List:

1. Select the **Item(s) in the favorites list**

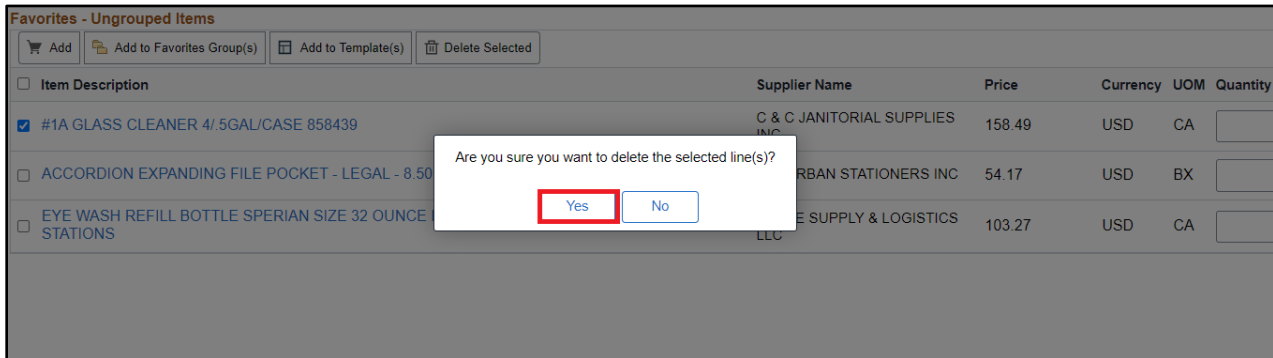
The screenshot shows the 'Create Requisition' page with the 'Favorites' sidebar active. The 'Favorites - Ungrouped Items' table contains the following data:

Item Description	Supplier Name	Price	Currency	UOM	Quantity	Actions
<input checked="" type="checkbox"/> #1A GLASS CLEANER 4/ 5GAL/CASE 858439	C & C JANITORIAL SUPPLIES INC	158.49	USD	CA	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>
<input type="checkbox"/> ACCORDION EXPANDING FILE POCKET - LEGAL - 8.50 INCH X 14 INC	SUBURBAN STATIONERS INC	54.17	USD	BX	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>
<input type="checkbox"/> EYE WASH REFILL BOTTLE SPERIAN SIZE 32 OUNCE FOR USE WITH PORTABLE EYE WASH STATIONS	NOBLE SUPPLY & LOGISTICS LLC	103.27	USD	CA	<input type="text"/>	<input type="button" value="Add"/> <input type="button" value="Delete"/>

2. Click **Delete Selected**



3. Click Yes



Deleting Favorites Groups:
 1. Expand Favorites Groups



The screenshot shows the 'Create Requisition' interface. On the left is a navigation menu with 'Favorites' selected. The main area is titled 'Favorites' and contains a 'Manage Favorites Groups' button (highlighted with a red box), a table for 'Favorites Groups' with one row (Fav Group: Test), and a table for 'Favorites - Ungrouped Items' with three rows of items. Each item row includes columns for Item Description, Supplier Name, Price, Currency, UOM, and Quantity, along with 'Add', 'Delete', and navigation icons.

2. Click **Manage Favorites Groups**

This screenshot is identical to the previous one, showing the 'Create Requisition' page with the 'Manage Favorites Groups' button highlighted in red.

3. Click the **Minus** icon from the row of the item that you wish to delete

The screenshot shows a modal dialog titled 'Favorites Groups'. It has 'Apply' and 'Done' buttons at the top right. Below is a table with columns: *Group Name, *Description, and Allow Sharing. The first row contains 'Fav Group', 'Test', and 'No'. To the right of the 'No' checkbox are 'Allow Access', 'Details', a plus icon, and a minus icon (highlighted with a red box). A 'Copy Favorites Group' link is at the bottom left.

4. Click **OK**



Delete current/selected rows from this page?
The delete will occur when the transaction is saved.