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:

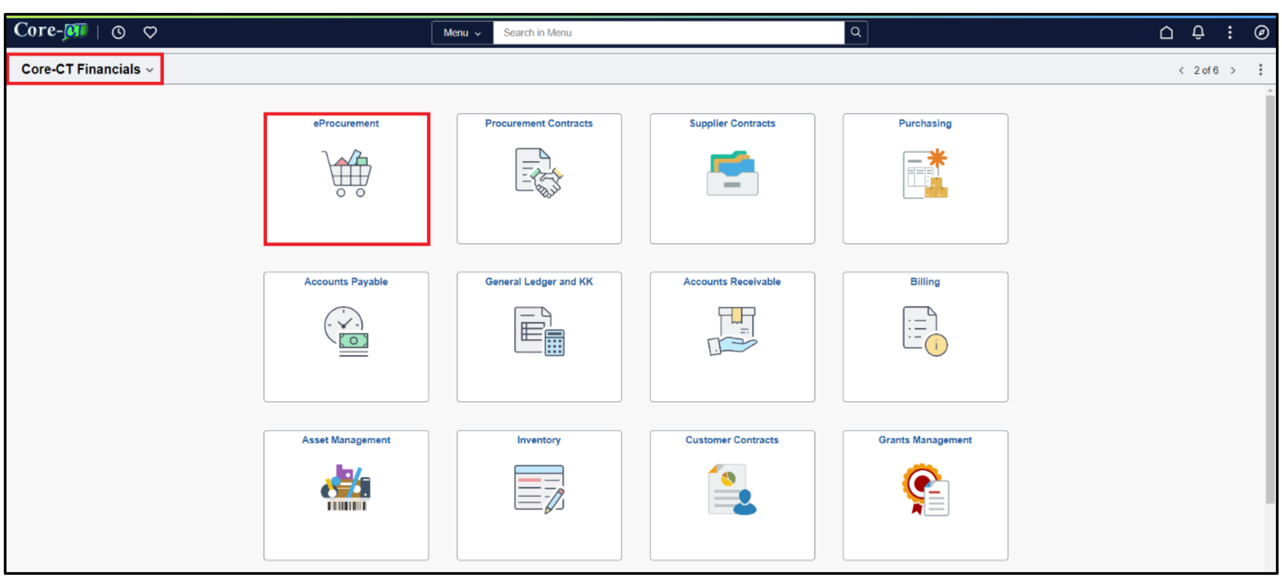
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

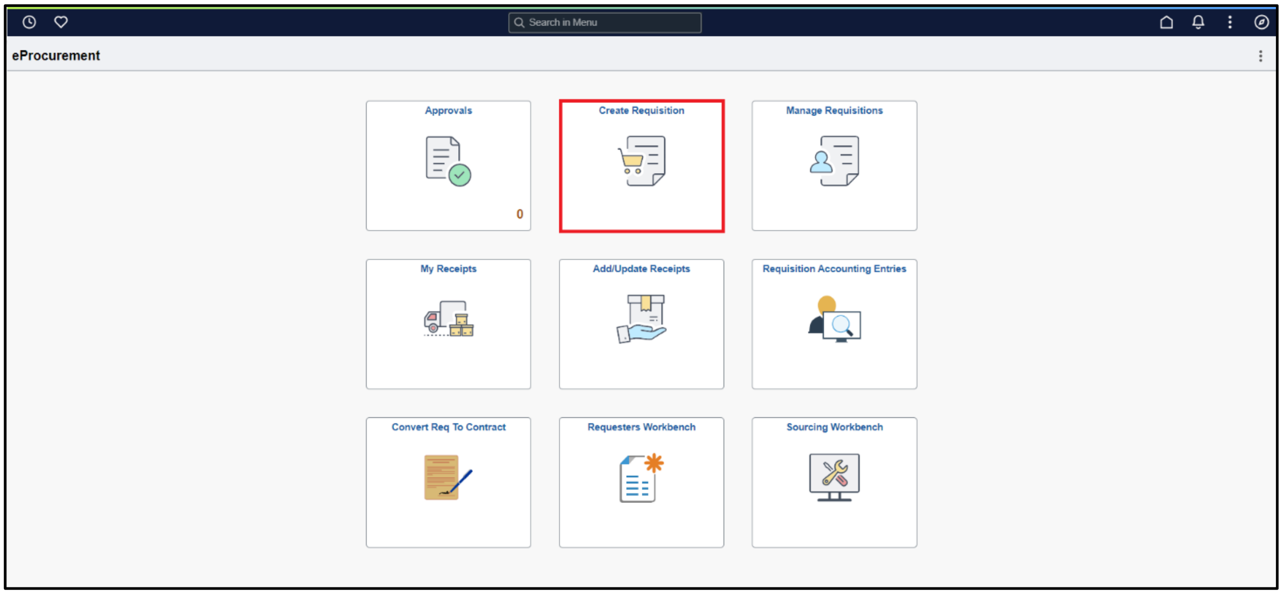
OR

Select **Core-CT Financials**

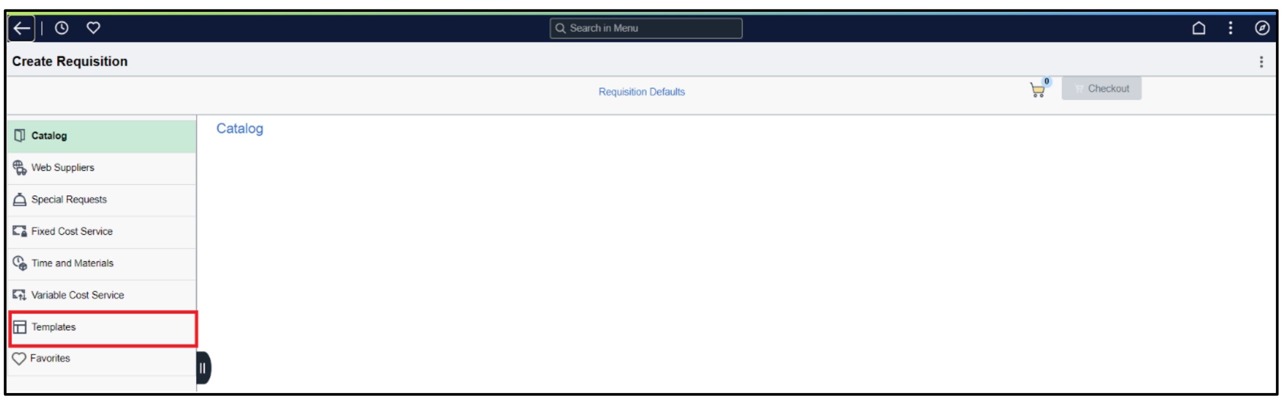
Click the **eProcurement** tile

Click **Create Requisitions** tile

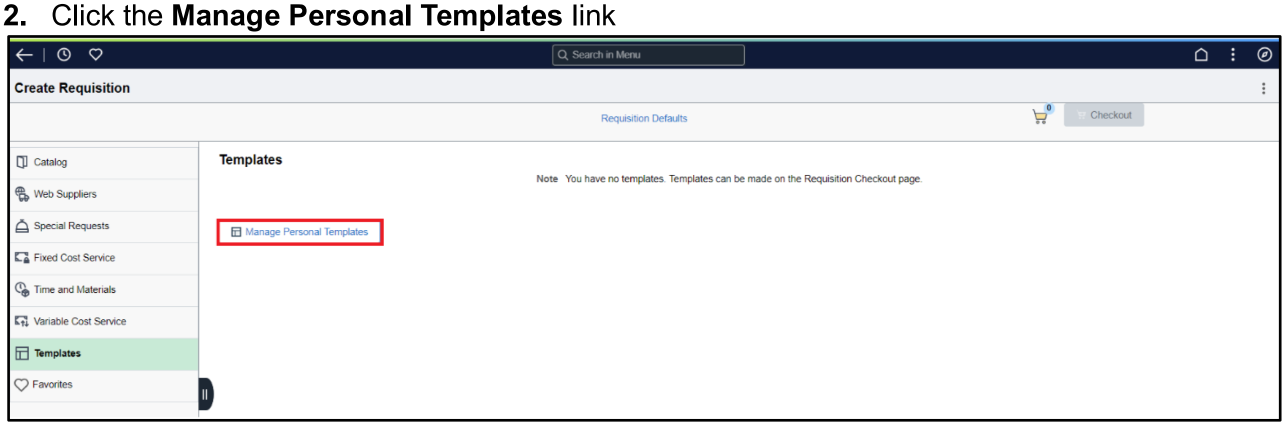




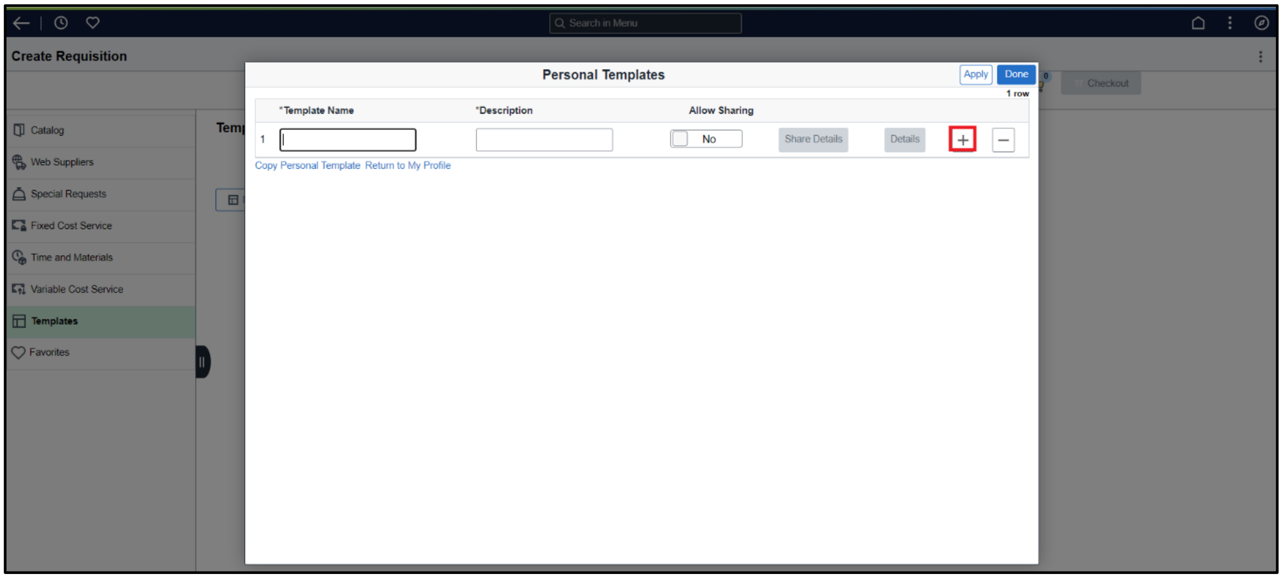
1. Click the **Templates** link



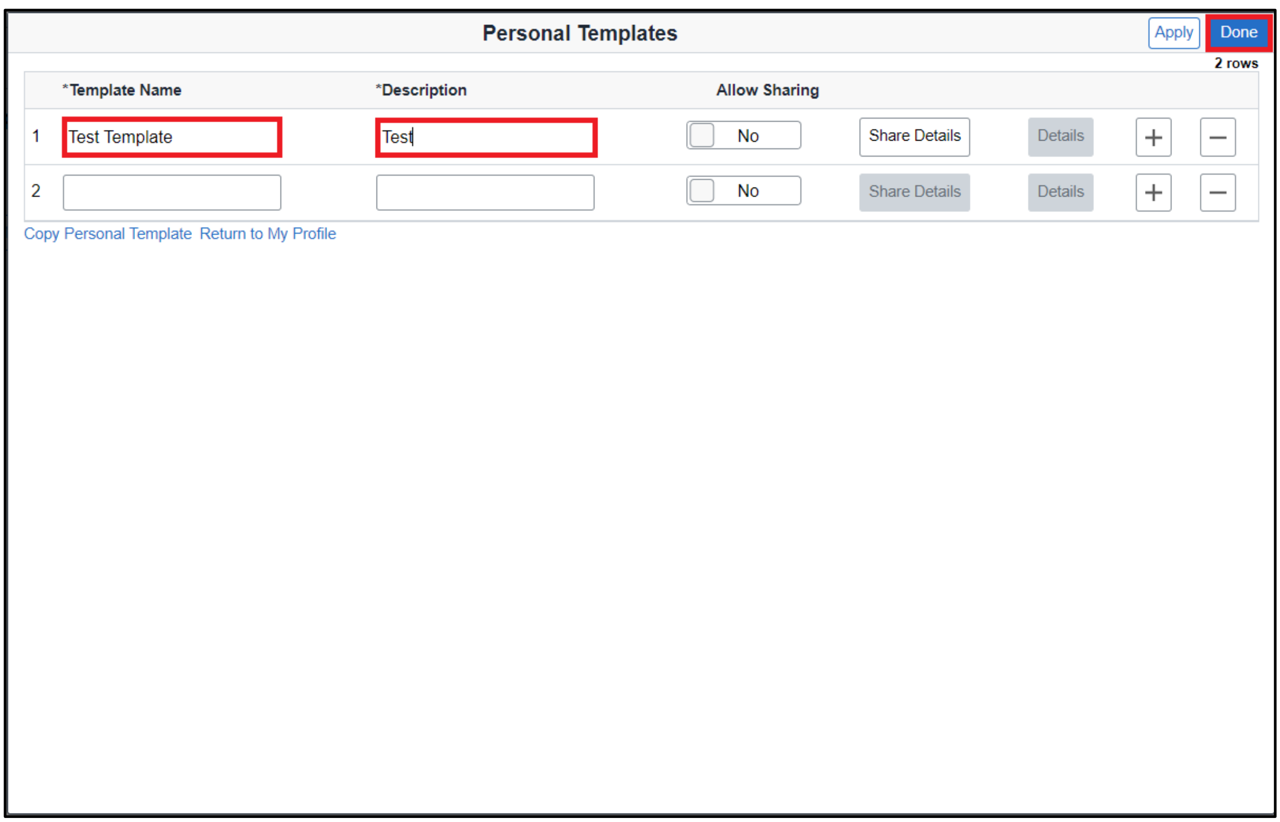
2. Click the **Manage Personal Templates** link



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:

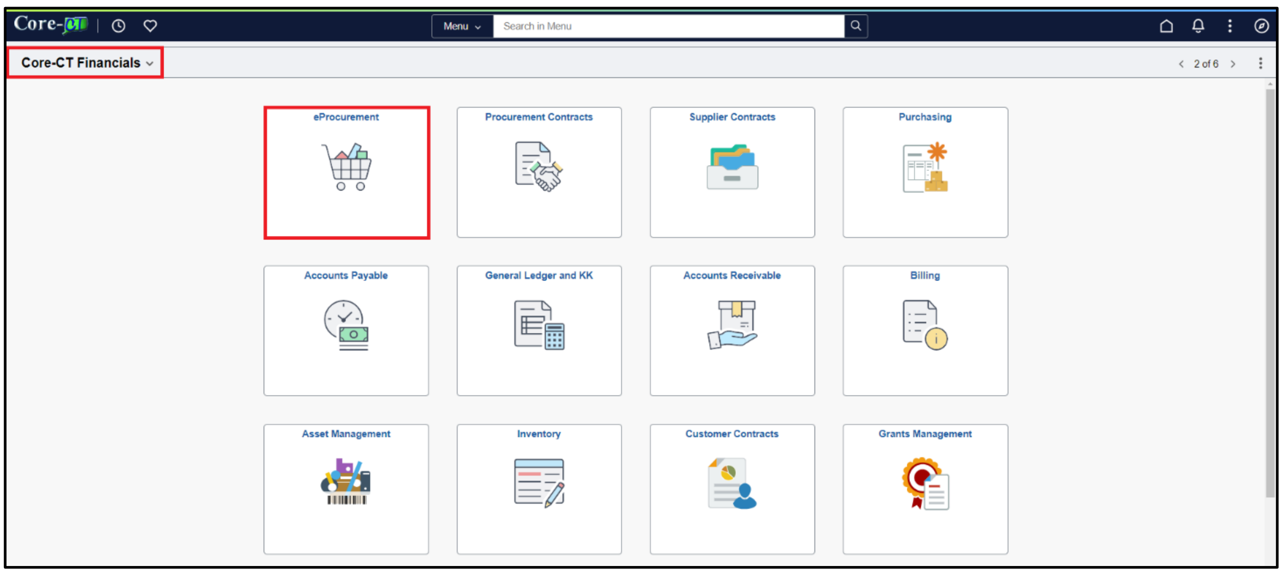
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

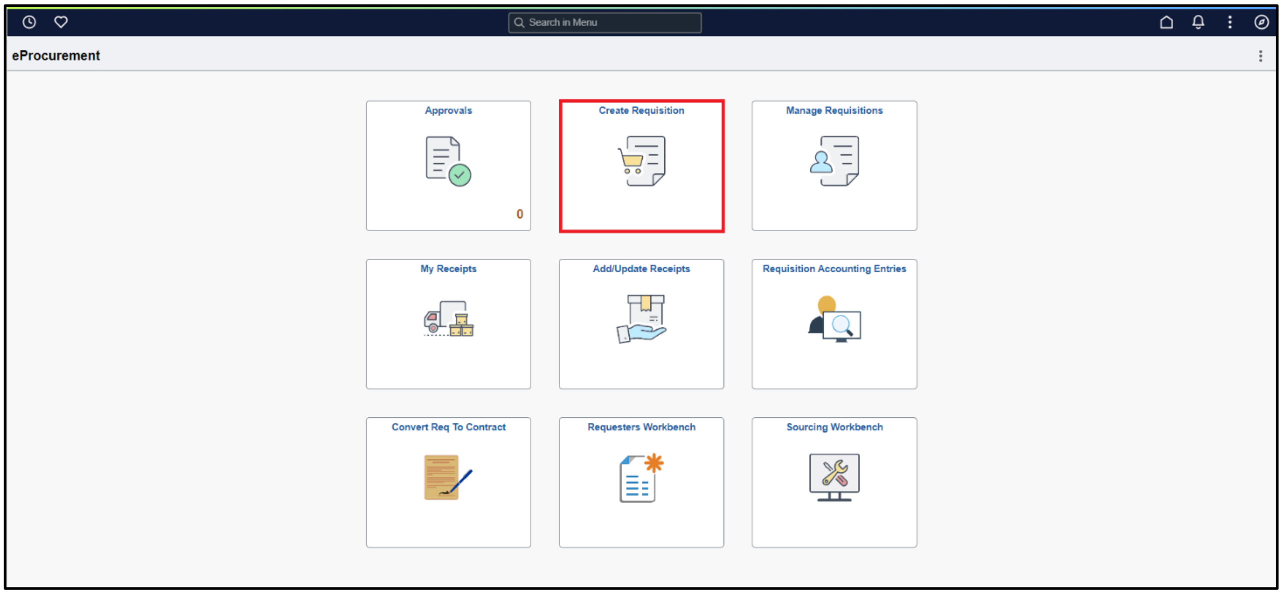
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

Click **Create Requisitions** tile

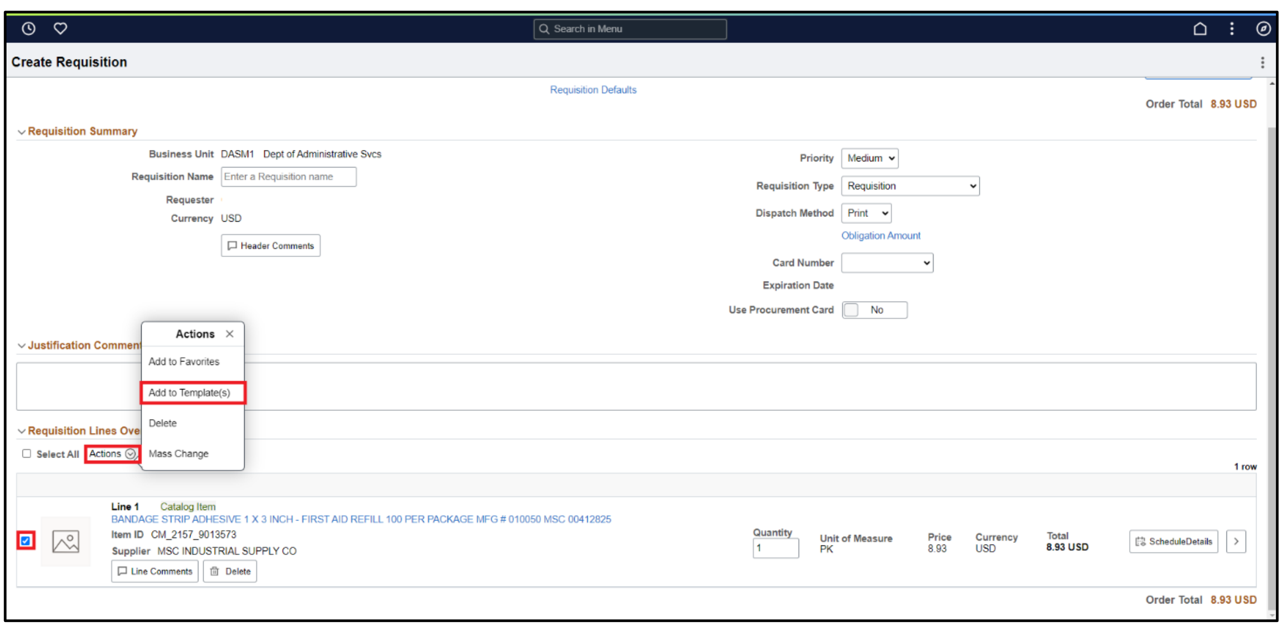




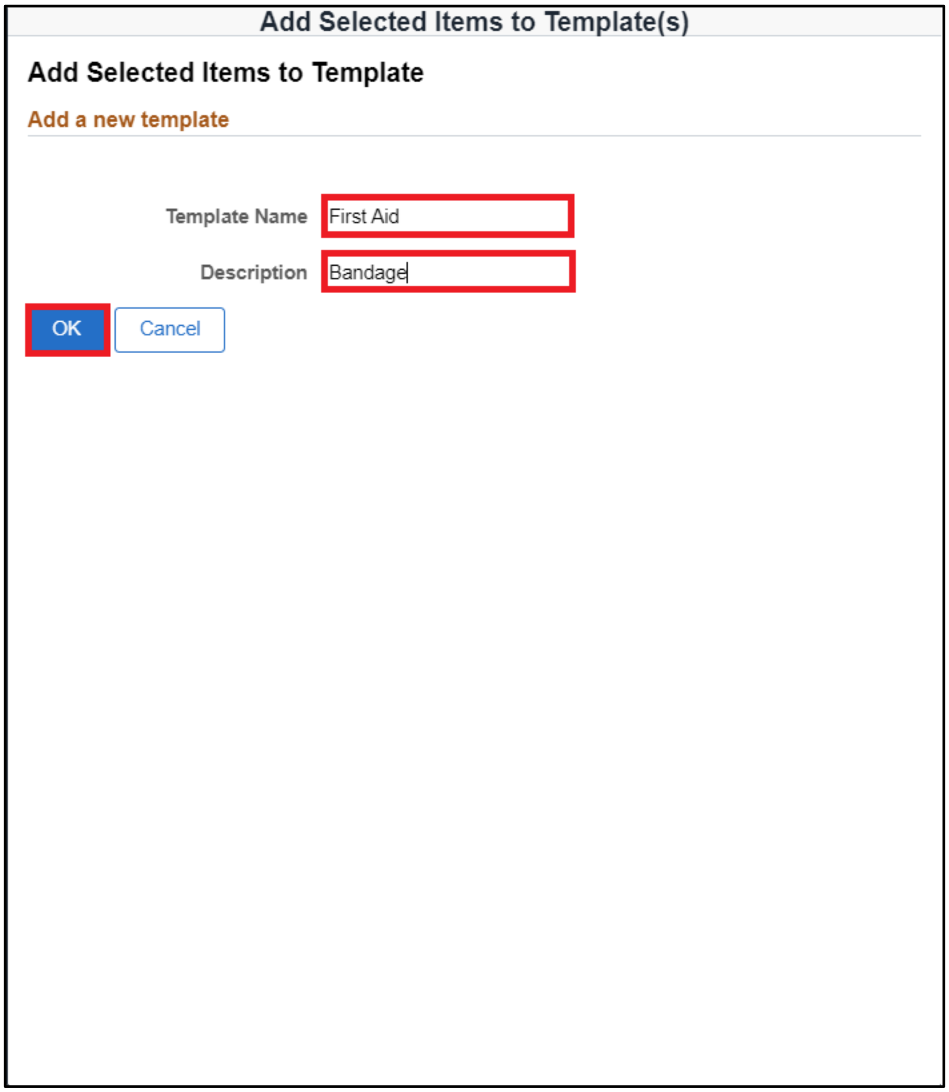
Procedure:

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**



Create a Personal Template through the Catalog Items Page

Navigation:

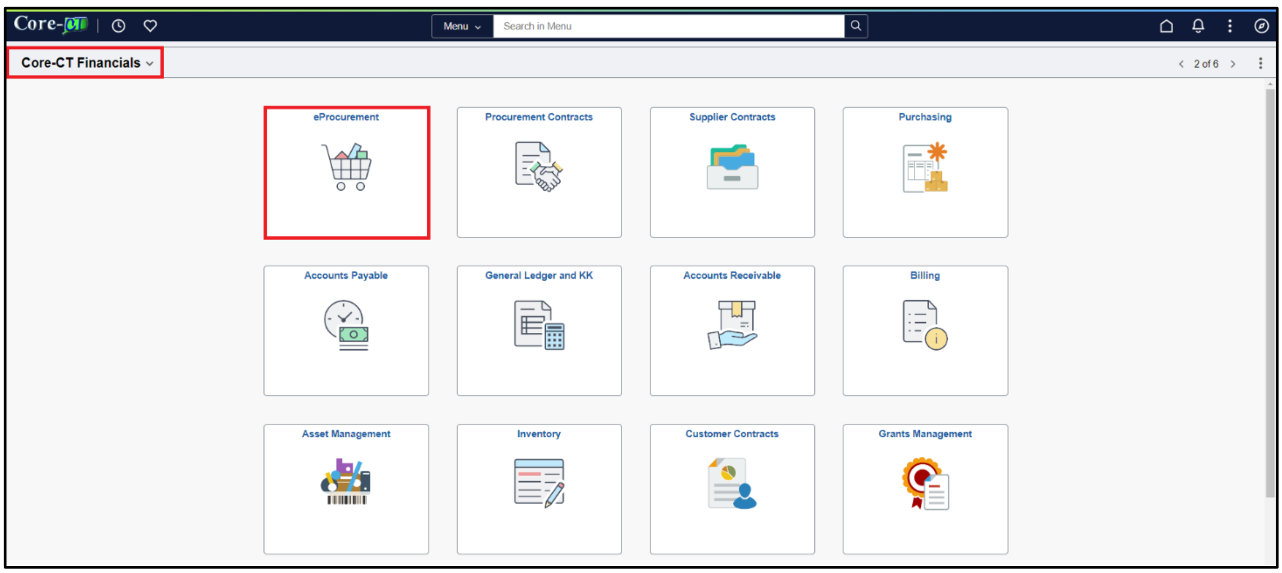
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

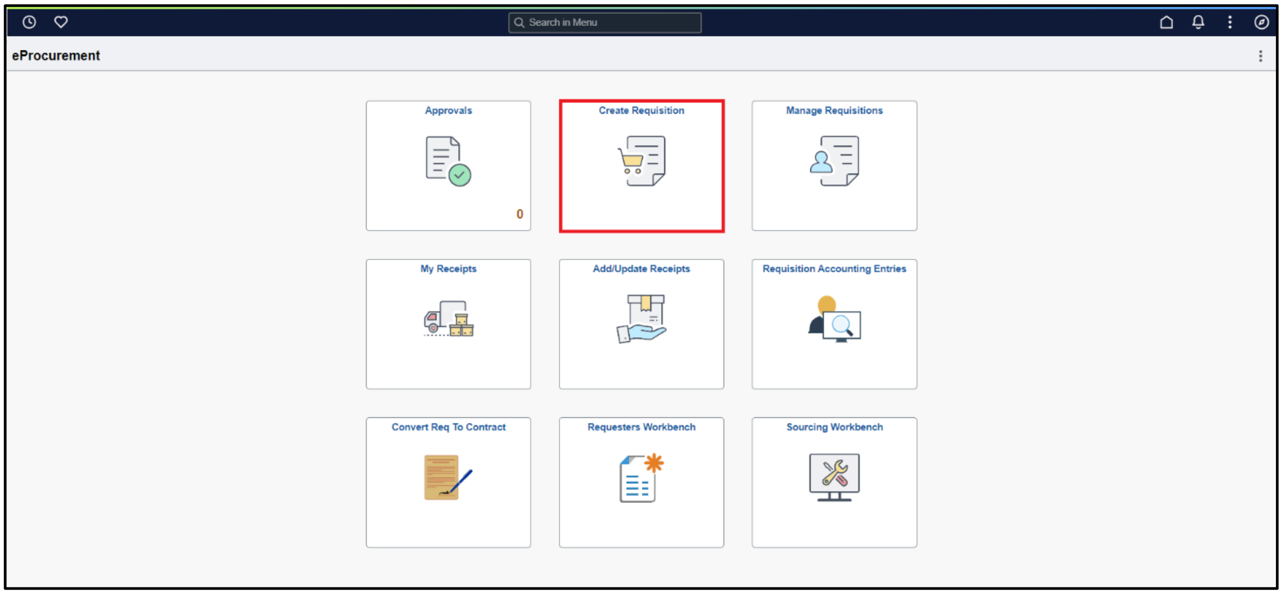
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

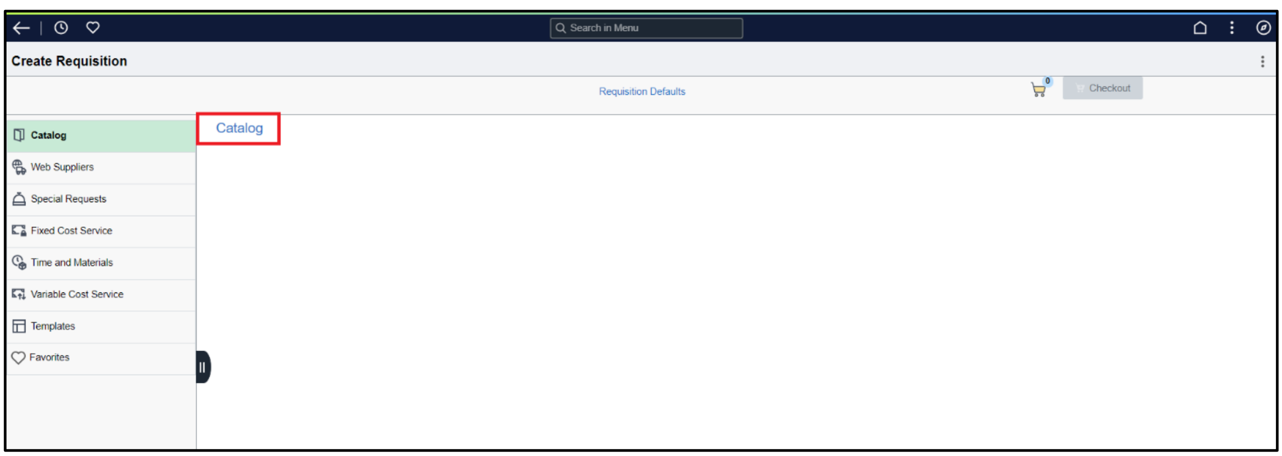
Click **Create Requisitions** tile



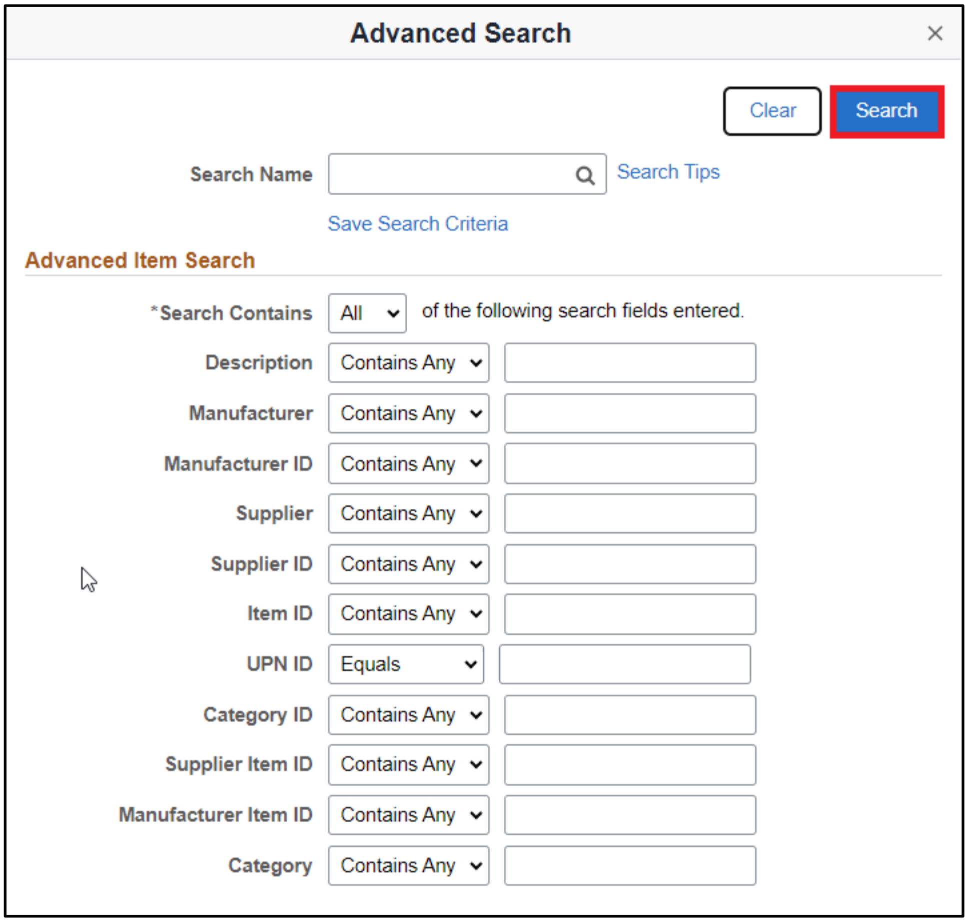


Add items to the cart and then checkout to view the Checkout – Review and Submit page.

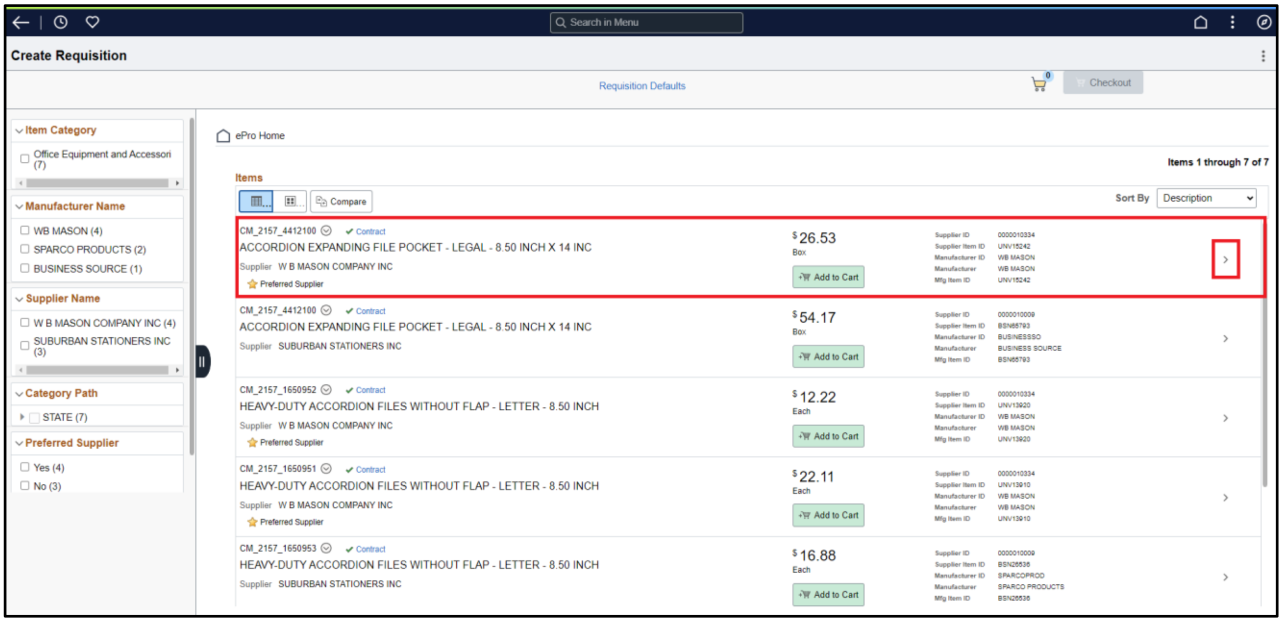
1. Click the **Catalog** link

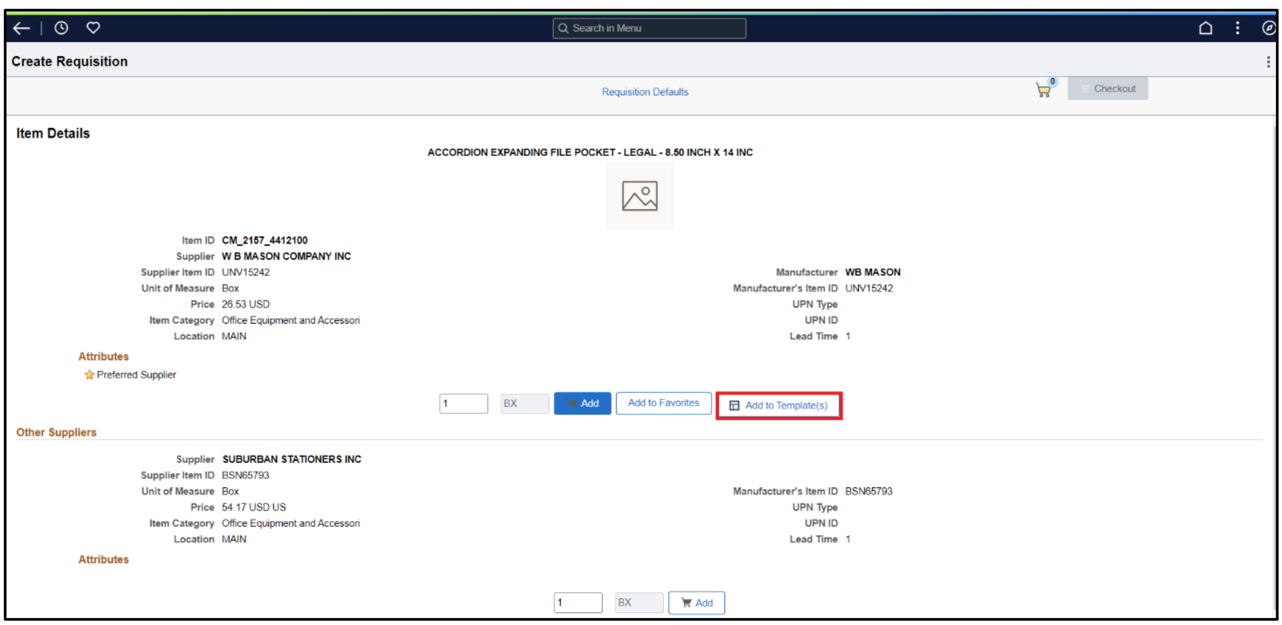


2. **Search** Catalog



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
Requisition Defaults
Checkout
Item Category
Office Equipment and Accessori (7)
Manufacturer Name
WB MASON (4)
SPARCO PRODUCTS (2)
BUSINESS SOURCE (1)
Supplier Name
W B MASON COMPANY INC (4)
SUBURBAN STATIONERS INC (3)
Category Path
STATE (7)
Preferred Supplier
Yes (4)
No (3)
ePro Home
Items
Items 1 through 7 of 7
Compare
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
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
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
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
CM_2157_1650953
Contract
HEAVY-DUTY ACCORDION FILES WITHOUT FLAP - LETTER - 8.50 INCH
Supplier SUBURBAN STATIONERS INC
$16.88
Each
Add to Cart


Search in Menu
Create Requisition
Requisition Defaults
Checkout
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
Manufacturer WB MASON
Manufacturer's Item ID UNV15242
UPN Type
UPN ID
Lead Time 1
Attributes
Preferred Supplier
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
Manufacturer's Item ID BSN65793
UPN Type
UPN ID
Lead Time 1
Attributes
1
BX
Add

Managing Personal Templates

Navigation:

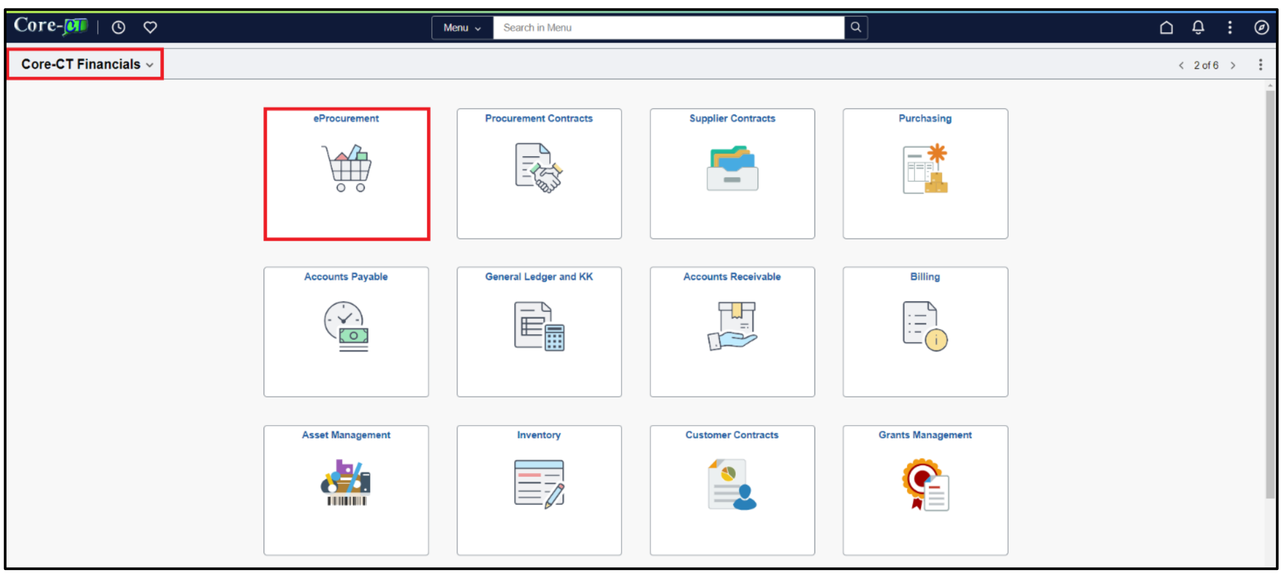
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

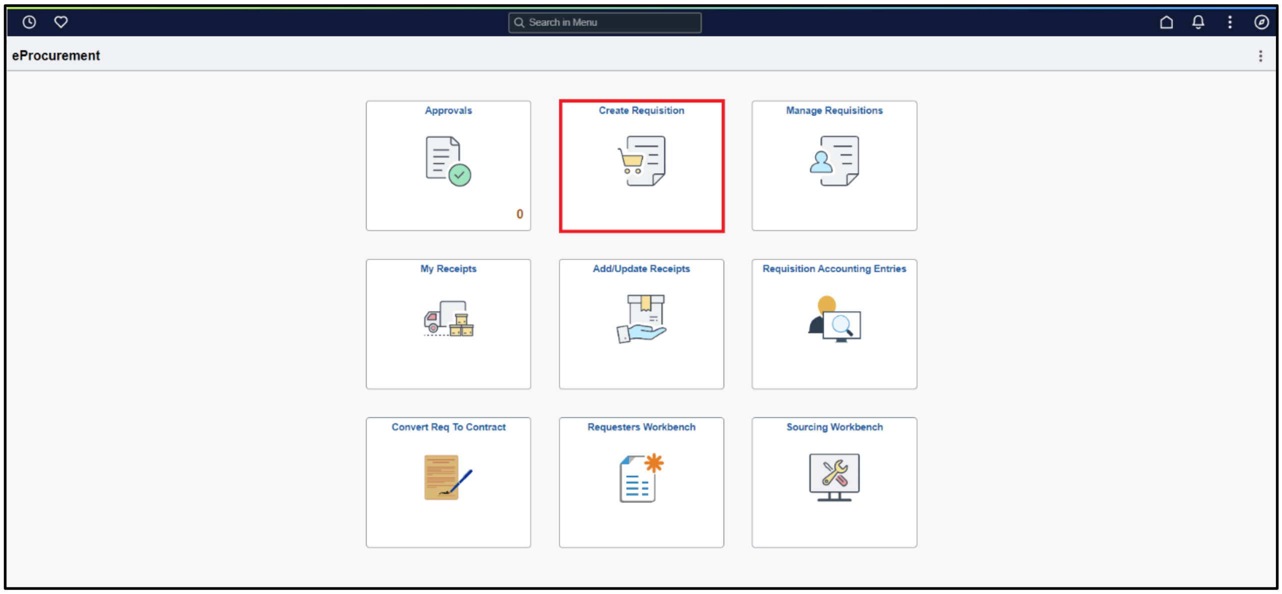
OR

Select **Core-CT Financials**

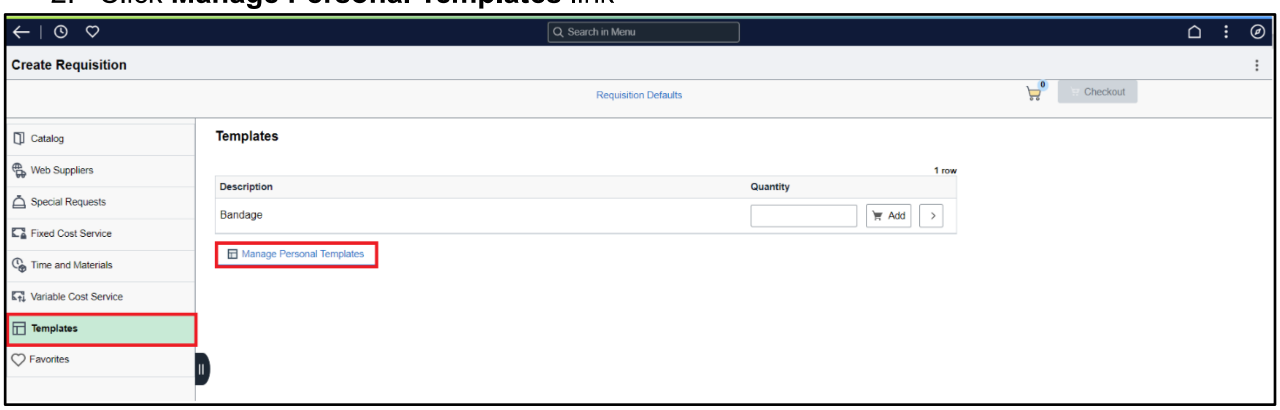
Click the **eProcurement** tile

Click **Create Requisitions** tile





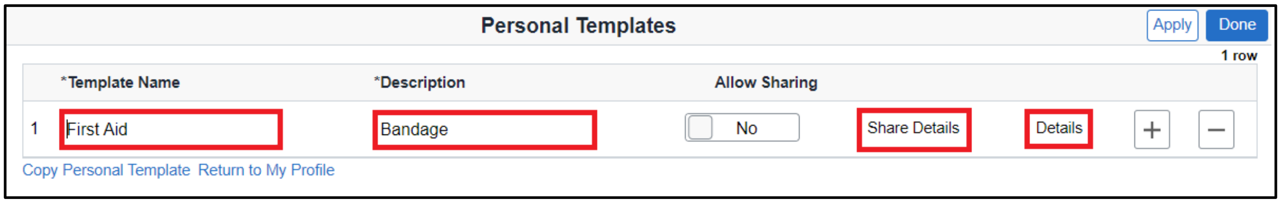
1. Click **Templates** on left hand menu
2. Click **Manage Personal Templates** link



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

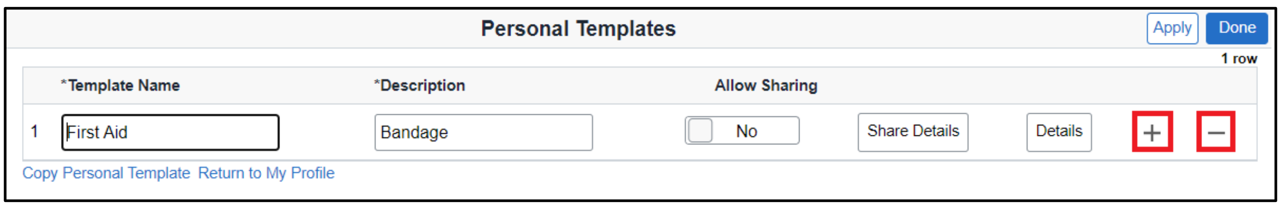
Existing templates will be listed.

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



Add / Remove Templates:

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



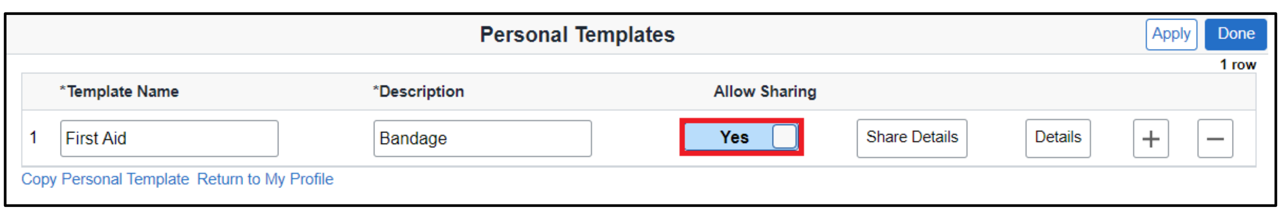
Allow Sharing:

Users have the ability to share templates with other requesters.

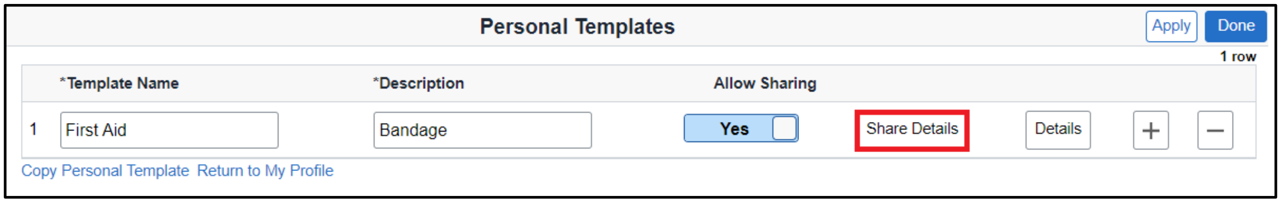
There are two items to note when sharing. These options are accessible from the **Manage Personal Template** page:

- 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.

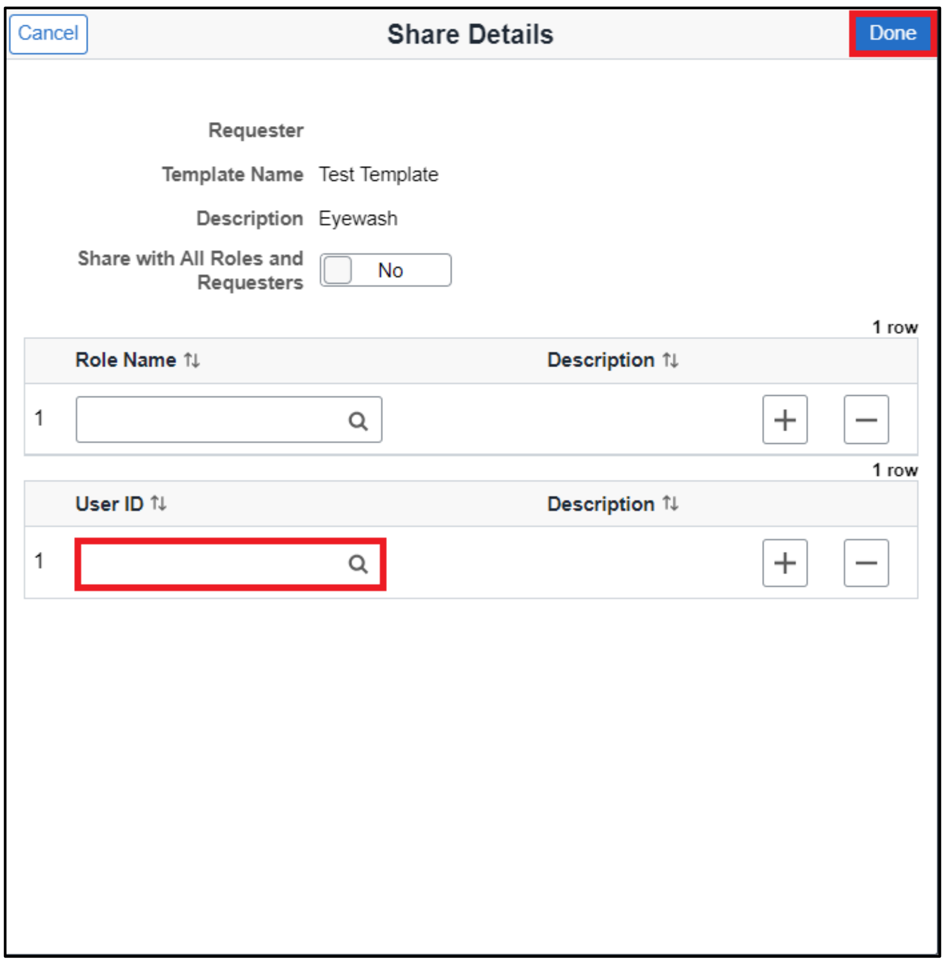
1. **Allow Sharing** by switching the **Allow Sharing** flag to Yes



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

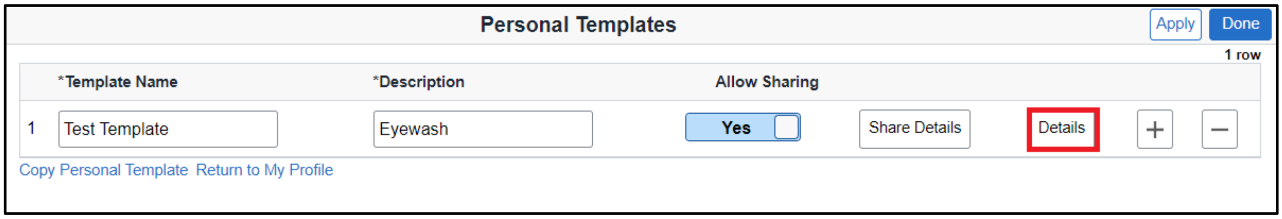


3. Enter the User ID
4. Click **Done**

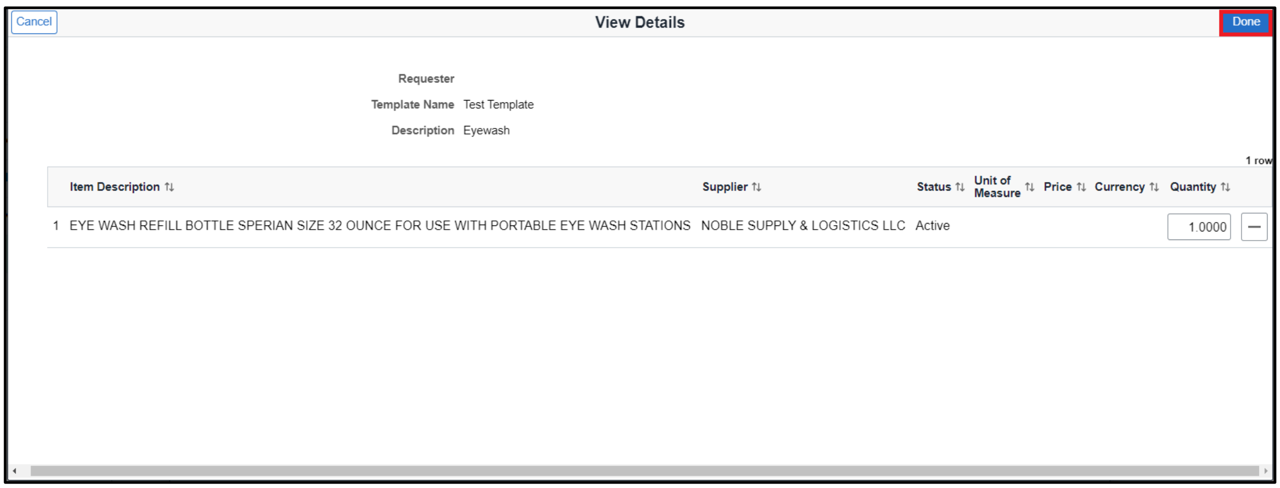


5. Details- **Details** page displays items in the template

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



6. Click **Done**



Adding / Deleting Favorites

Navigation:

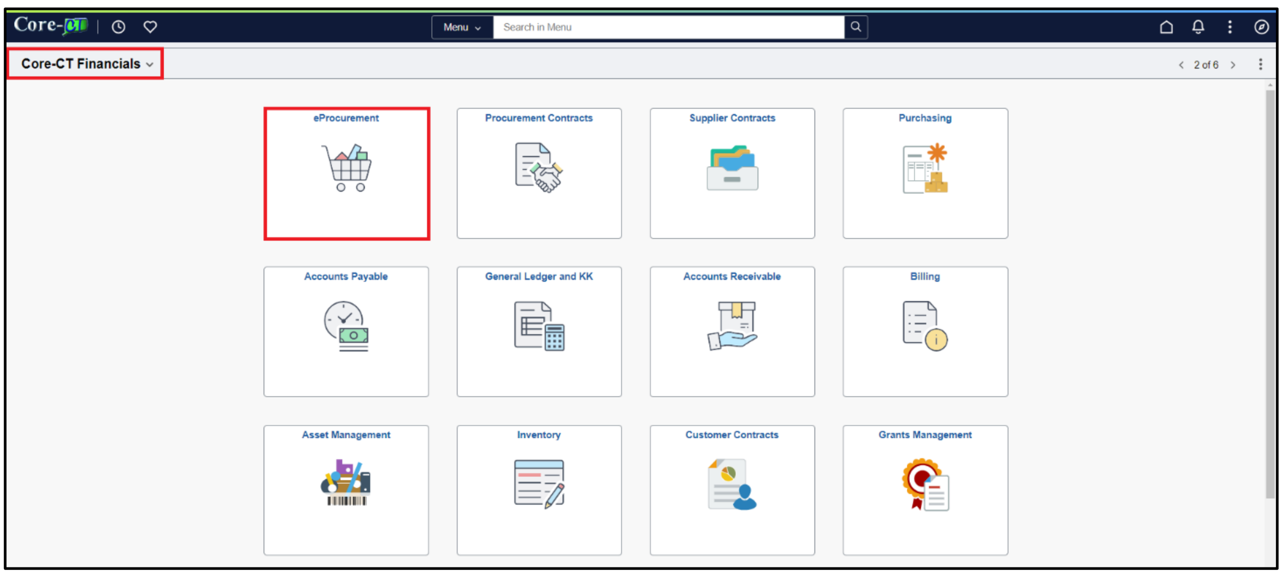
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisitions

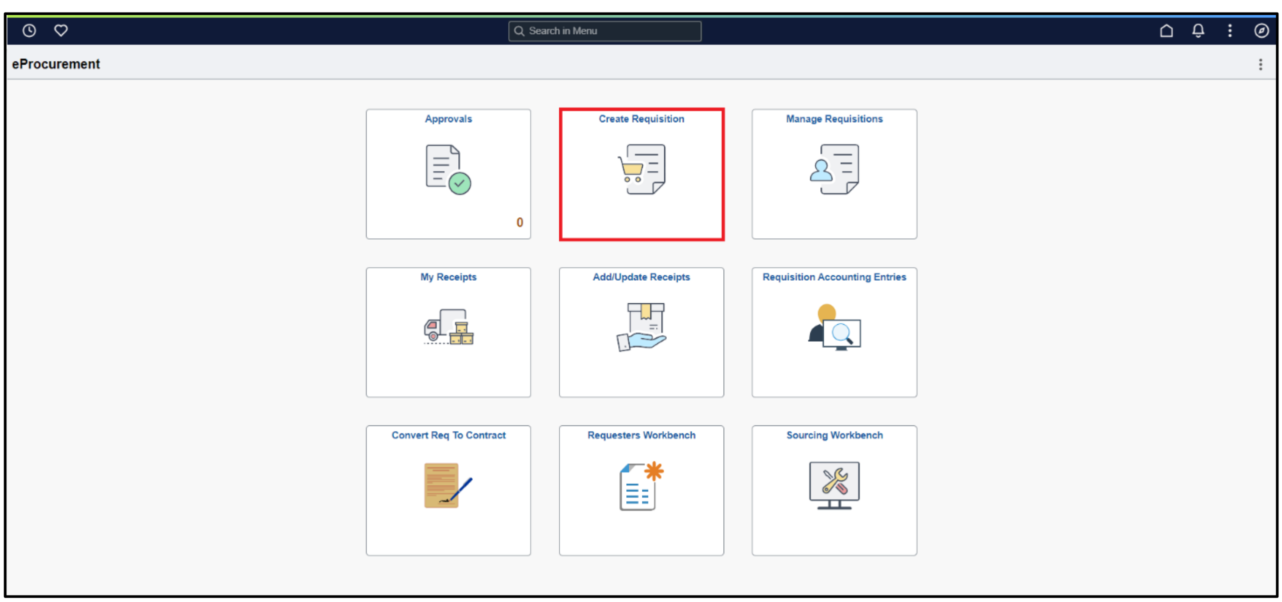
OR

Select **Core-CT Financials**

Click the **eProcurement** tile

Click **Create Requisitions** tile

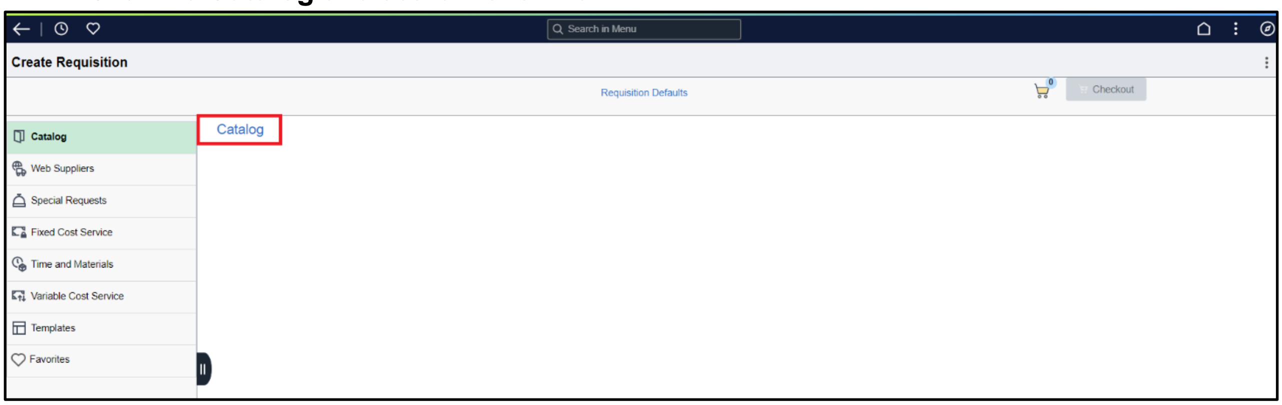


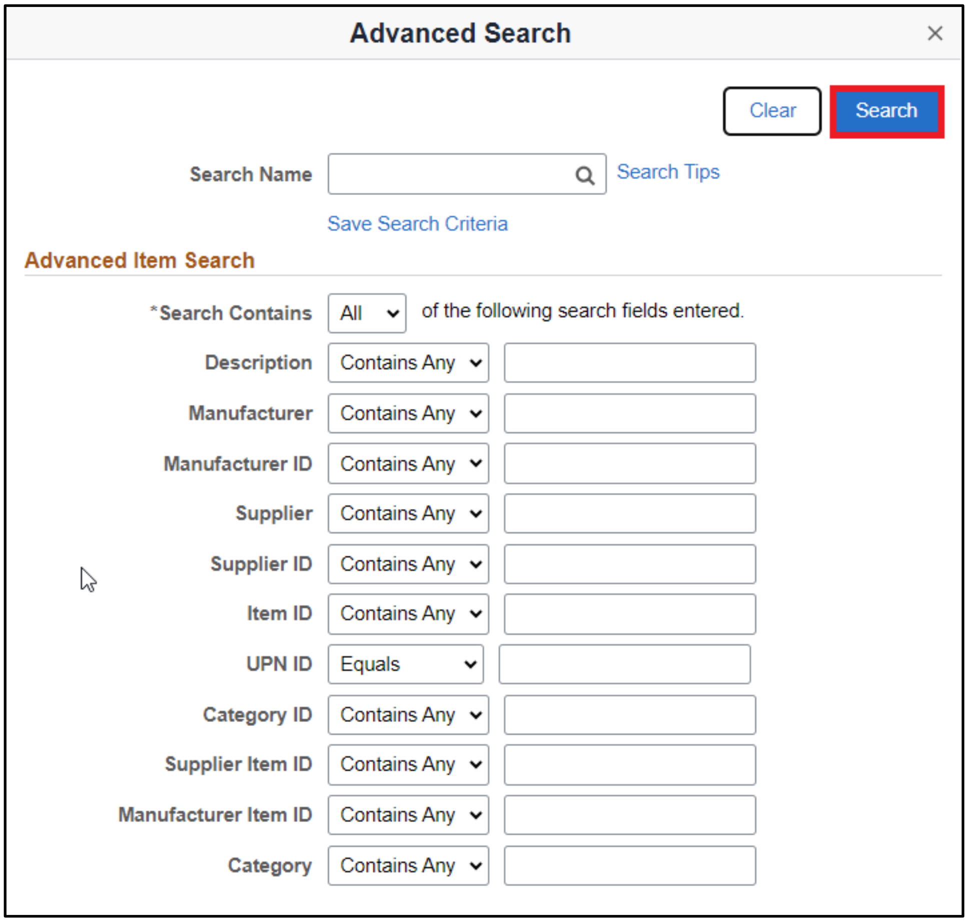


Items can be added to the favorites list during a requisition entry. To add an item to a users' favorites, use the **Catalog Item Search Results Page Review and Submit** page, or Left-hand Navigation.

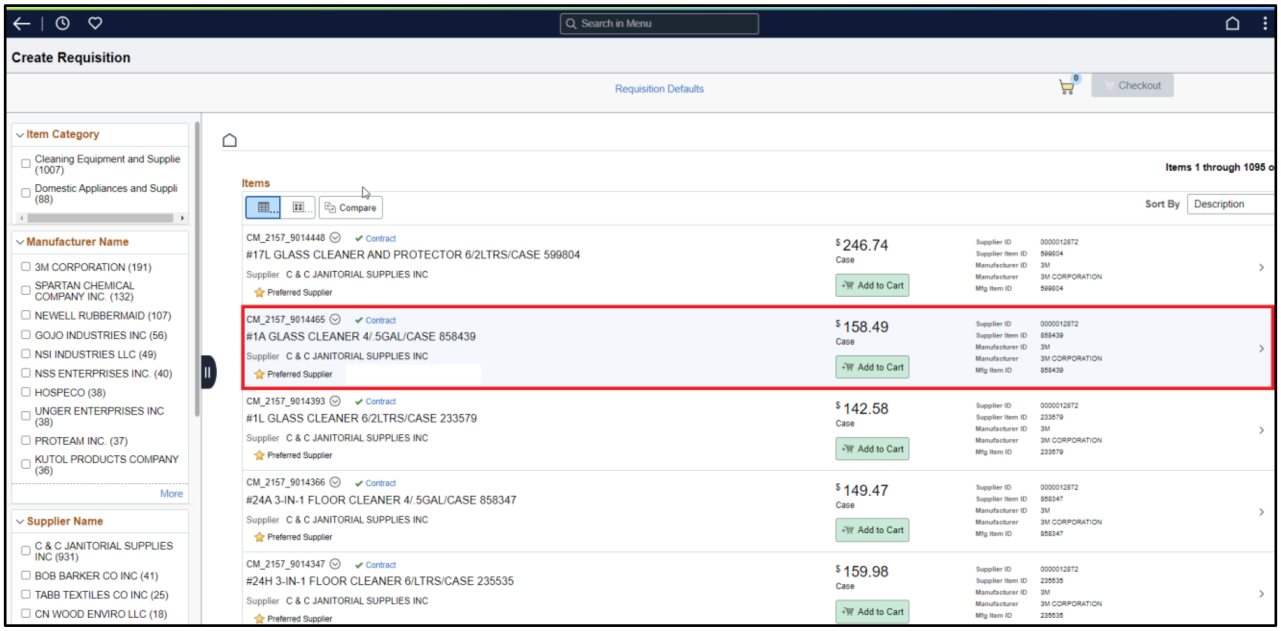
Adding to Favorites List: Catalog Item Search Results Page

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

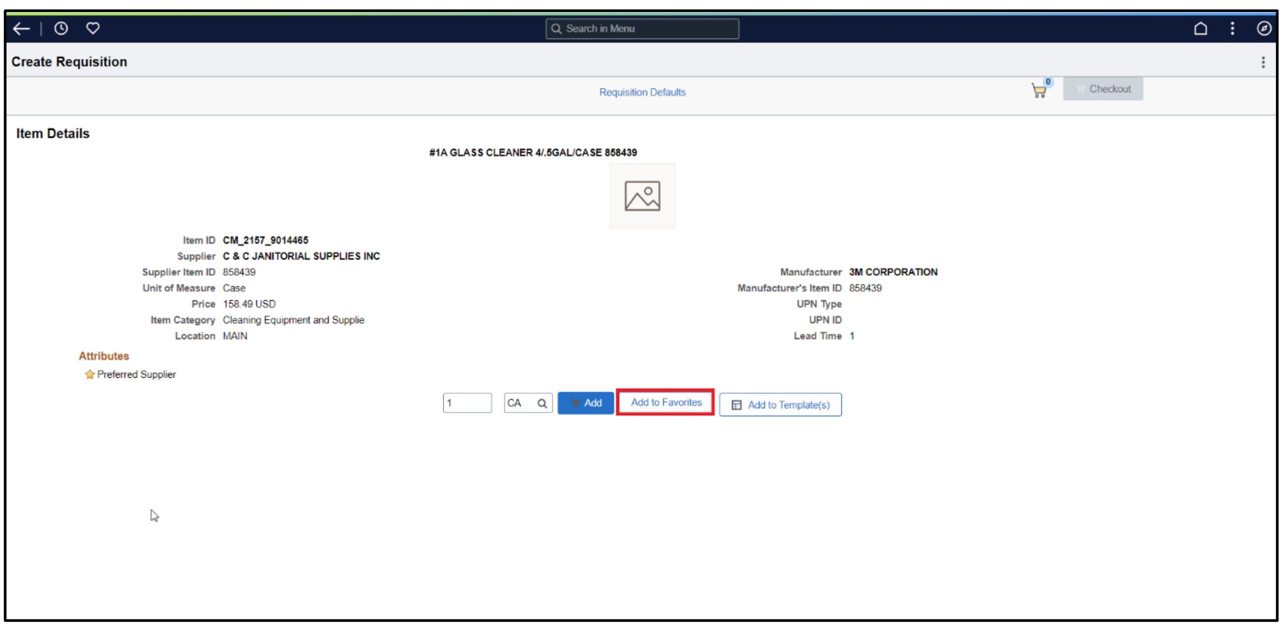




2. Select **Item** by clicking the arrow on the right



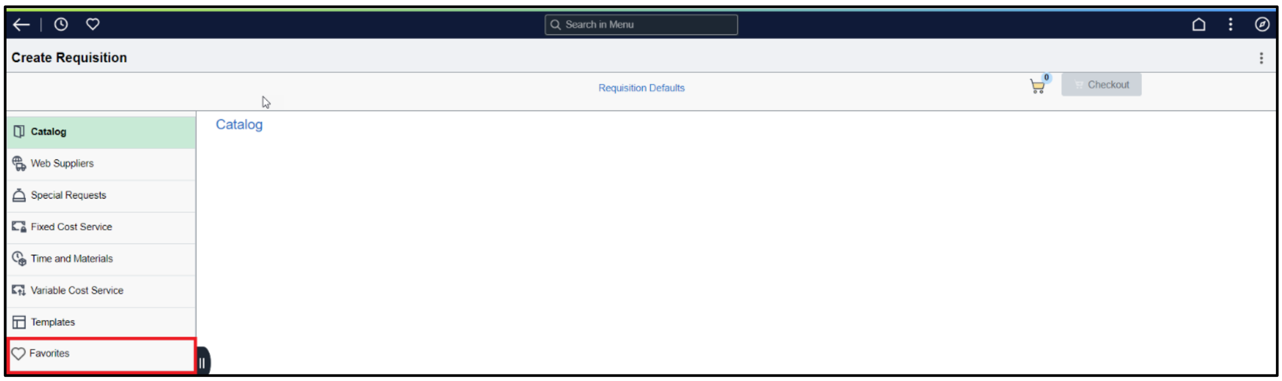
3. Click **Add to Favorites** button



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

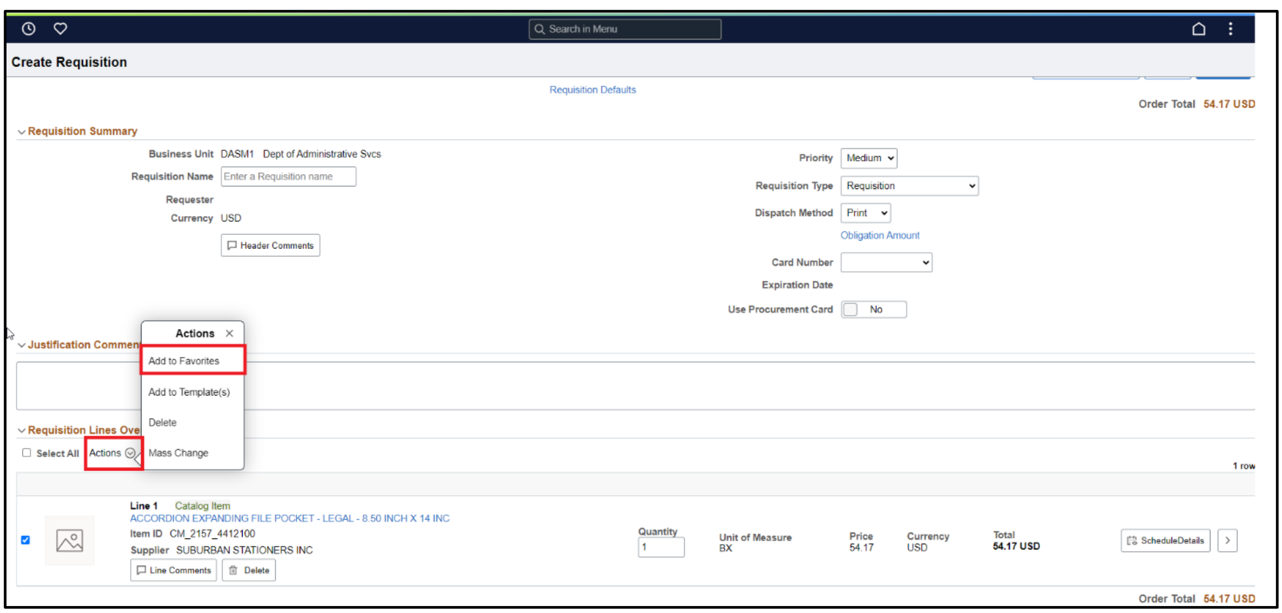
Adding to Favorites List: Left Hand Navigation

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

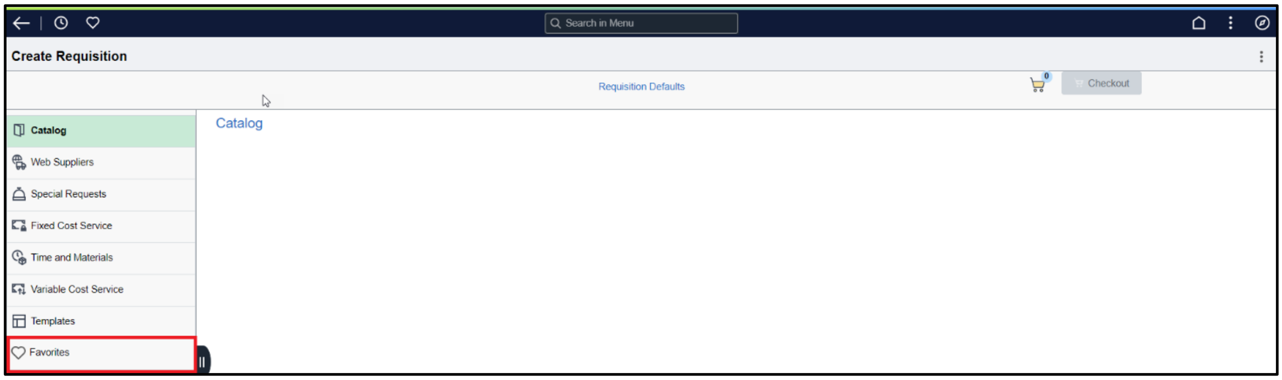


Adding to Favorites List: Checkout – Review and Submit page

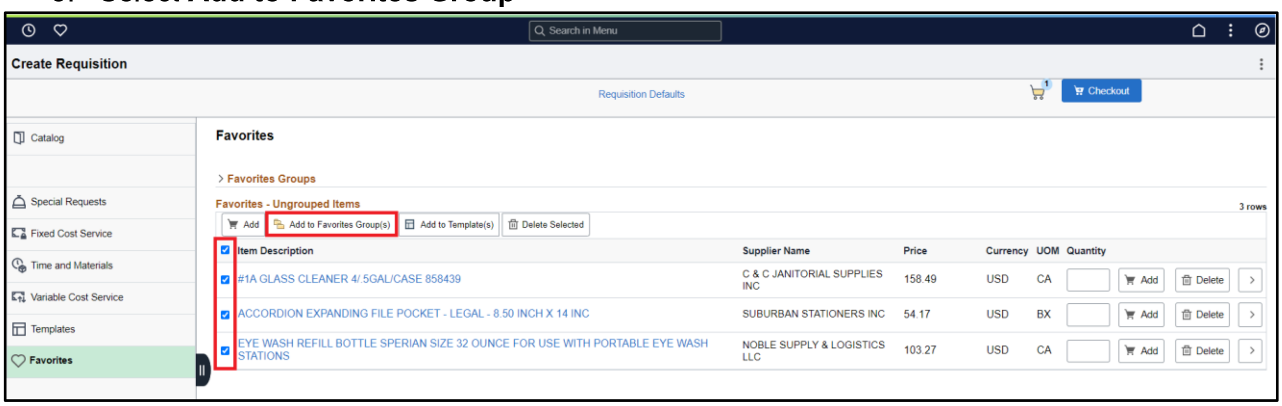
1. Select the items to be added to Favorites
2. Click the **Actions** drop down
3. Click **Add to Favorites**



Adding to Favorites Group:



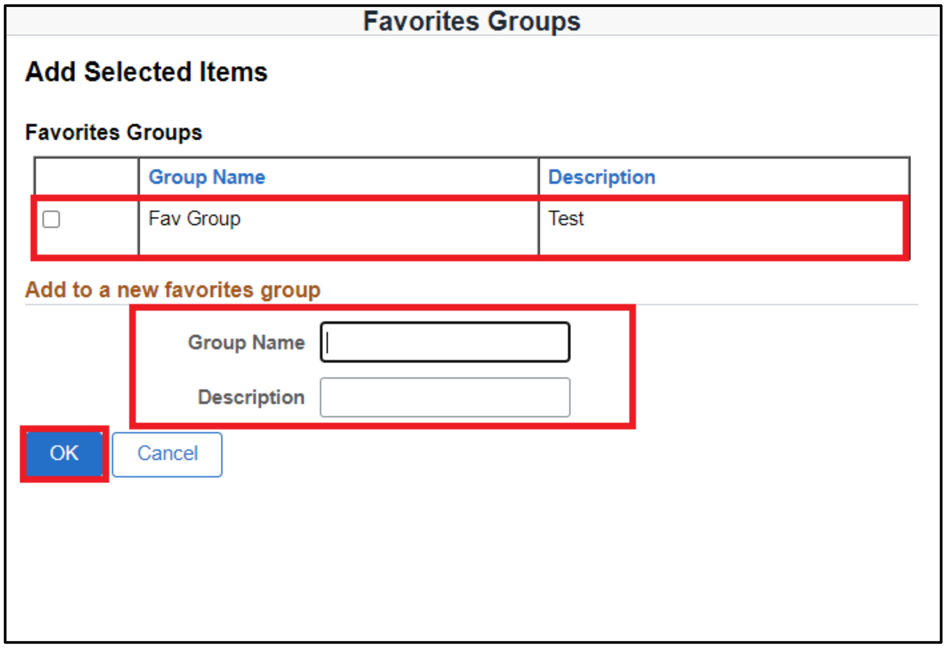
4. Select **Item(s)** from **Favorites List**
5. Select **Add to Favorites Group**



6. Select **Favorites Group**

   OR

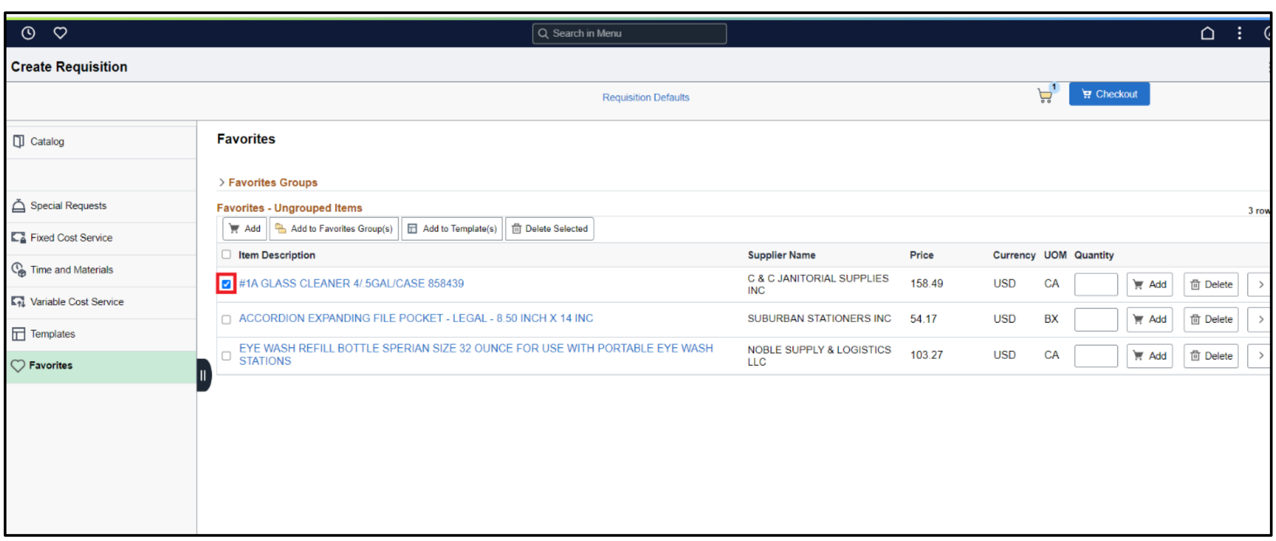
Enter **Group Name** and **Description** to create a new favorite group 6.
Click **OK**



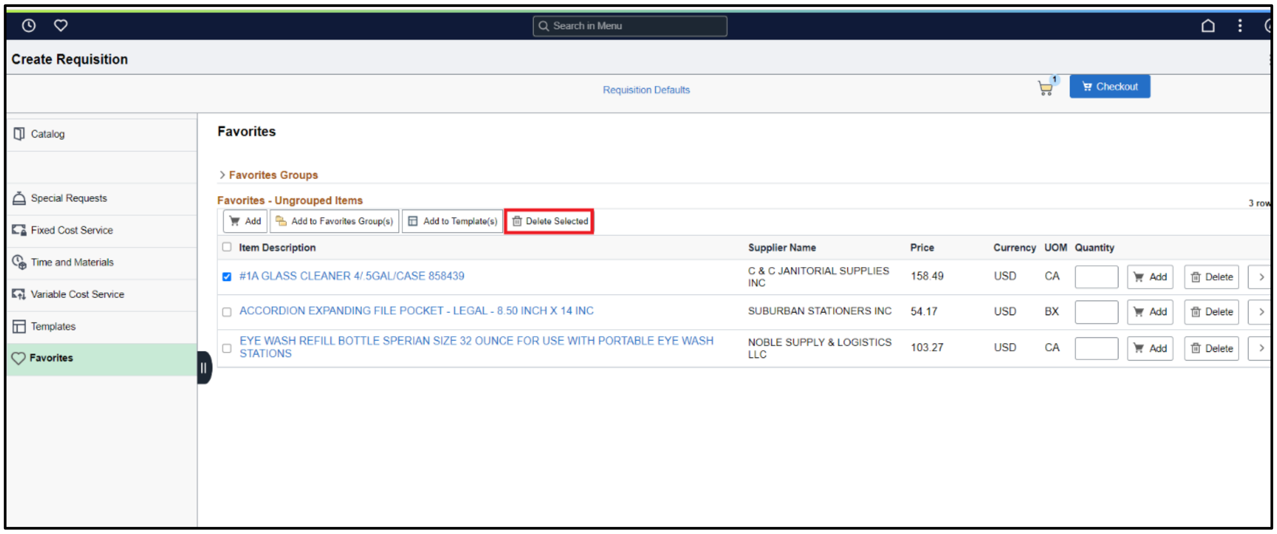
Note: *When an item is added to a favorites group, it no longer appears as an ungrouped item within the favorites list.*

Deleting Items on Favorites List:

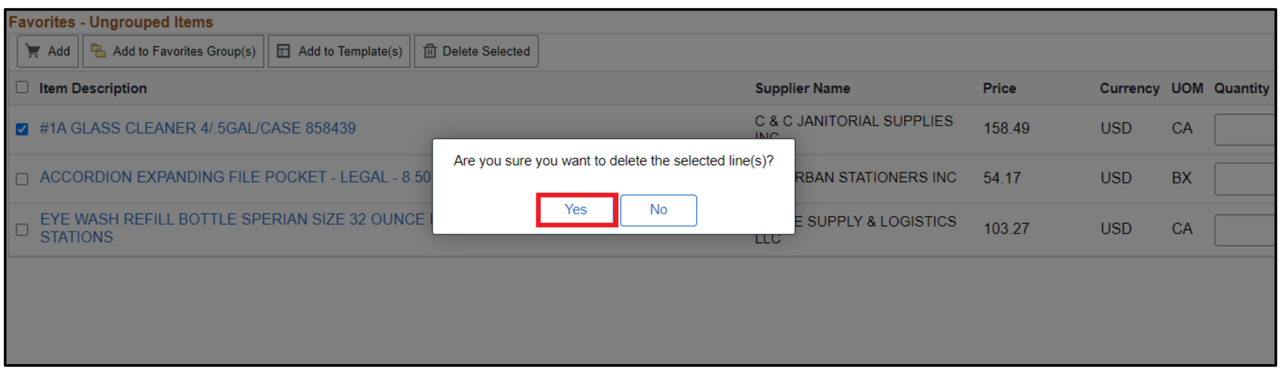
1. Select the **Item(s) in the** favorites list



2. Click **Delete Selected**

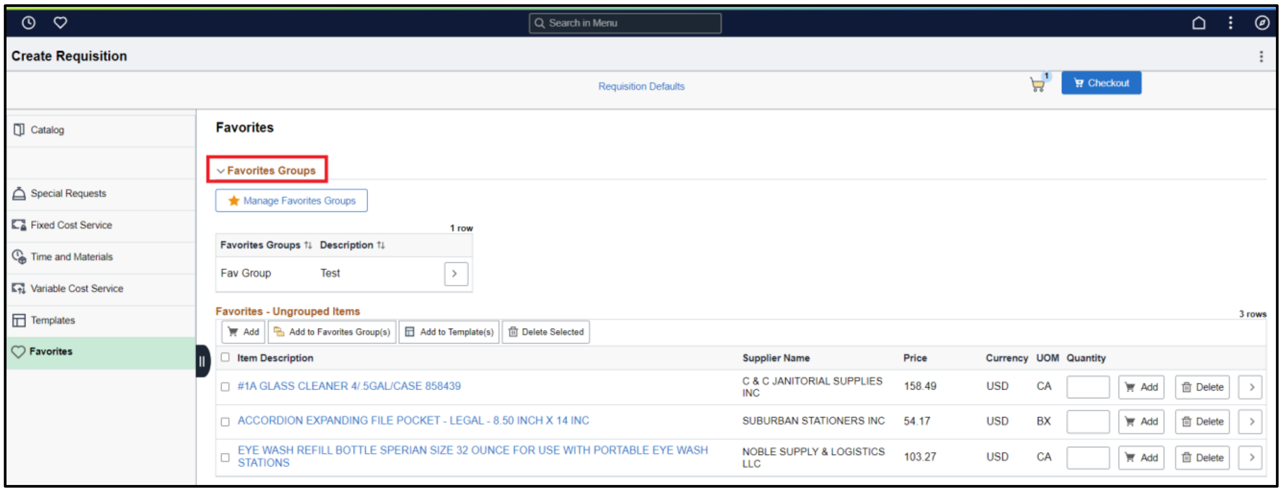


3. Click **Yes**

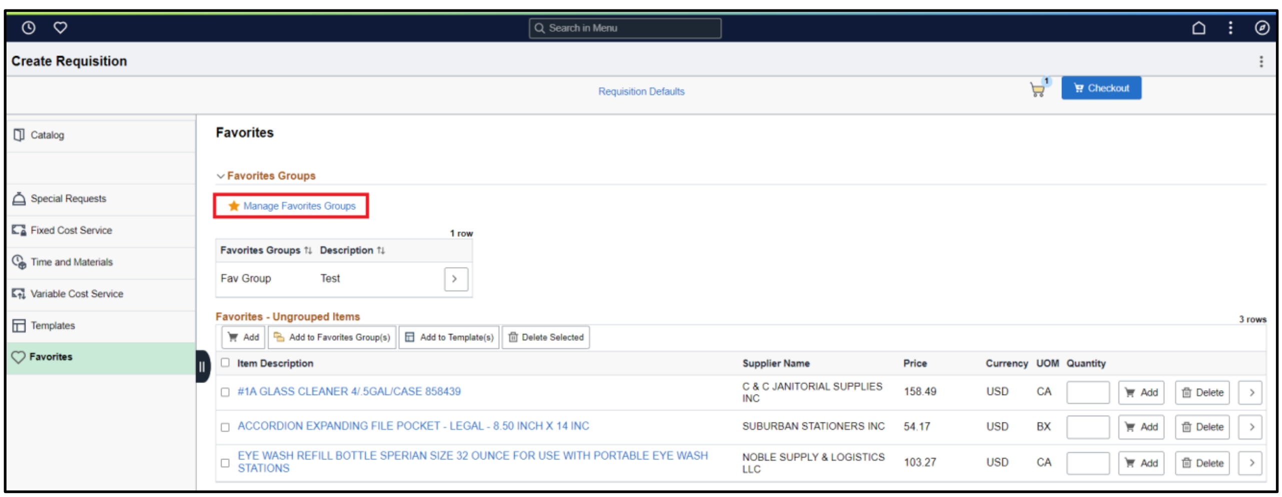


Deleting Favorites Groups:

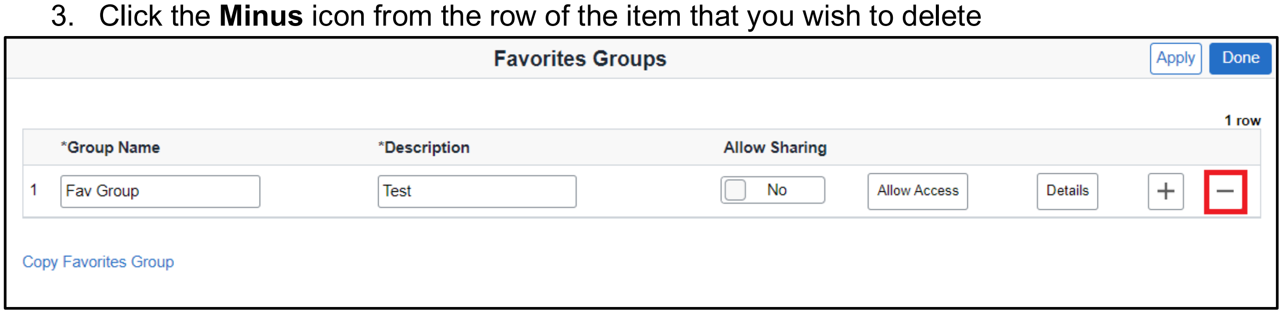
1. Expand **Favorites Groups**



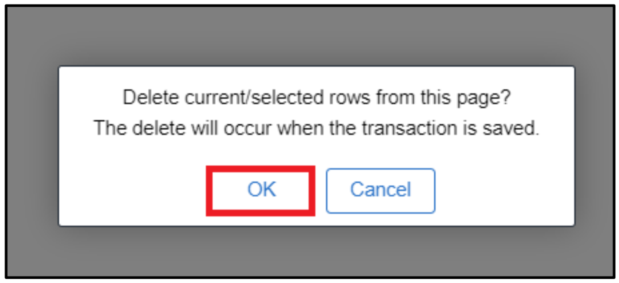
2. Click **Manage Favorites Groups**



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



4. Click **OK**


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