

Adding Items to Templates (Create Requisition)

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In Core-CT 8.9 requesters could save newly created requisitions as **Personal Templates** by selecting the Save as Template checkbox before saving and submitting the requisition. These templates could not be edited.

In Core-CT 9.1 creating templates, maintaining template items, and deleting templates can be done in **Create Requisitions** without having to save or submit the requisition.

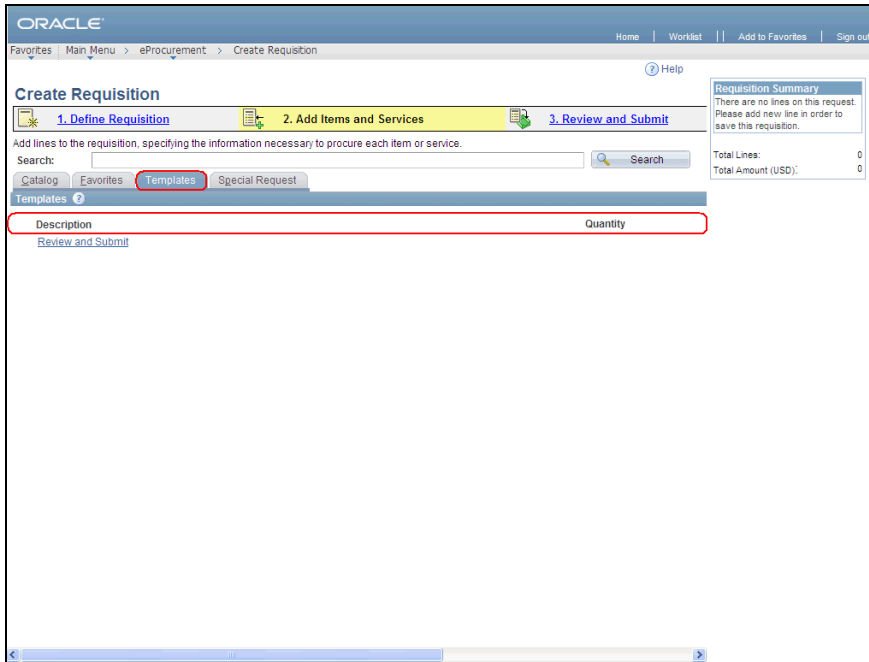
The options for adding items to a **Personal Template** are:

- Favorite items can be added to a new or existing template from the **Favorites** page
- A requester can add any or all the items listed on the **Review and Submit** page

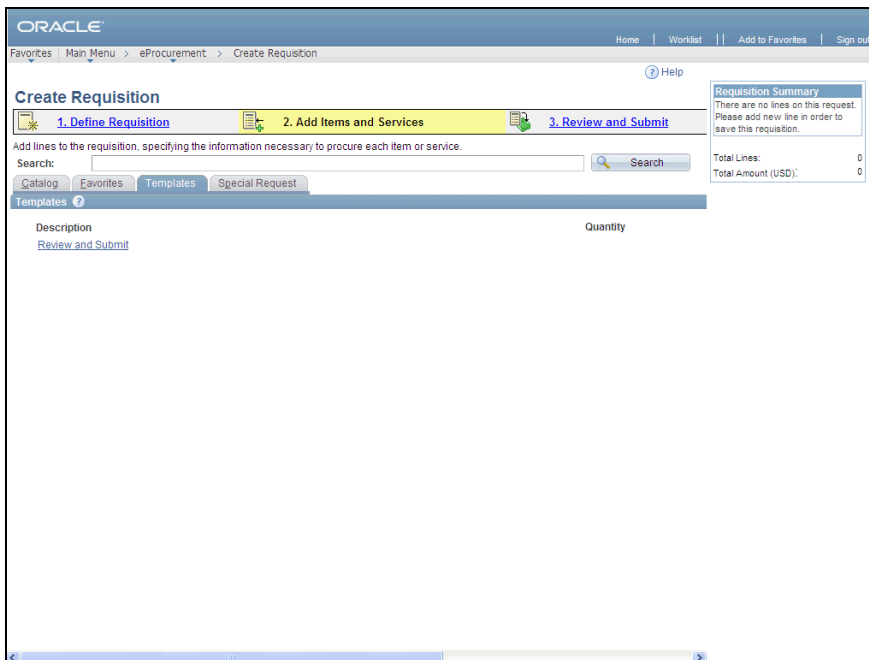
In this example a requester creates a new template and adds items from the **Favorites** page.

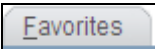
Procedure

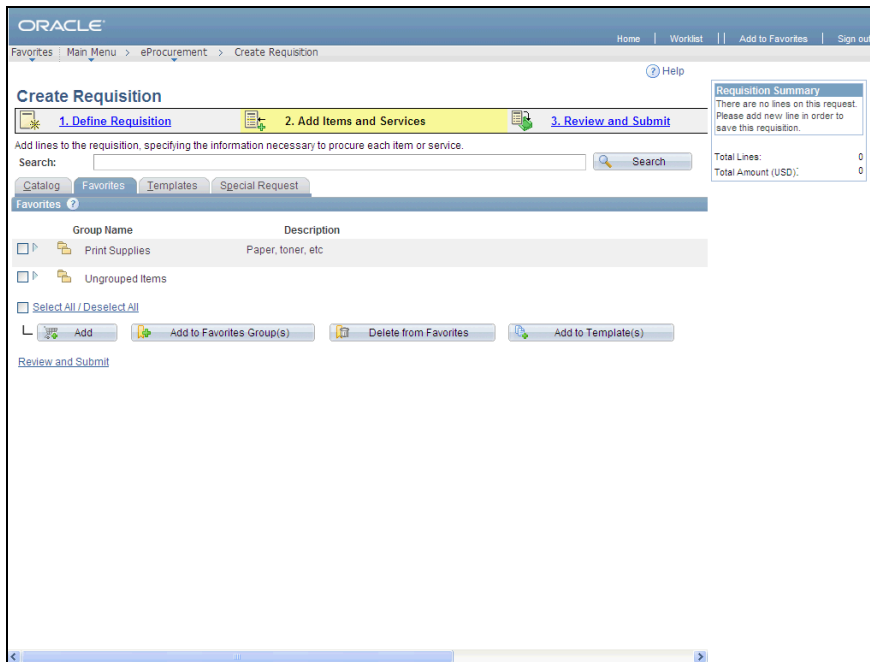
Navigation: eProcurement > Create Requisition




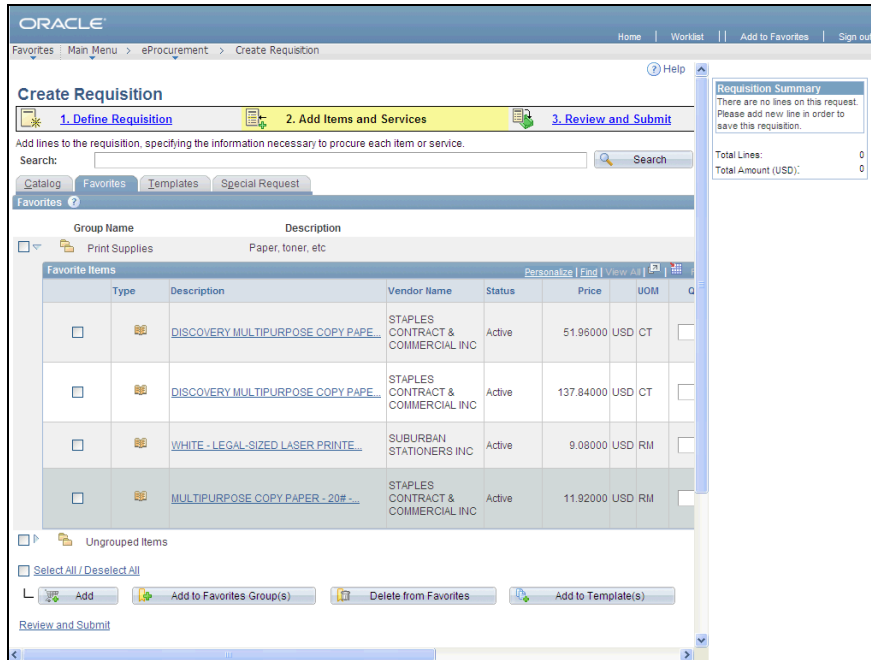
Step	Action
1.	<p>In Core-CT 9.1 requesters can add individual items or groups of items to create personal templates without saving and submitting a requisition.</p> <p>In this example the requester has no saved templates.</p>



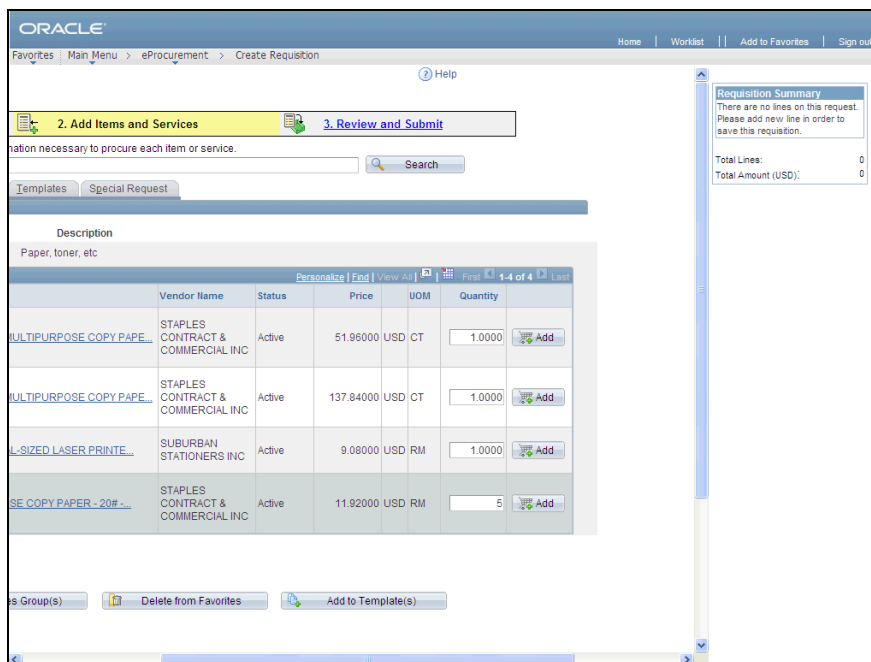
Step	Action
2.	Click the Favorites tab to add items to a new template. 



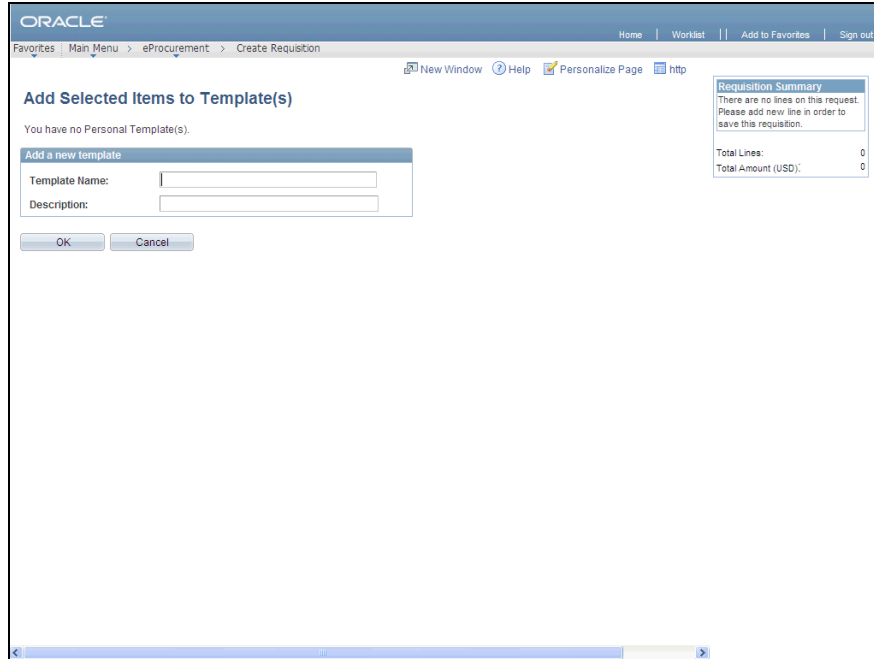
Step	Action
3.	Click the Expand Section button. 

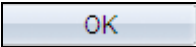


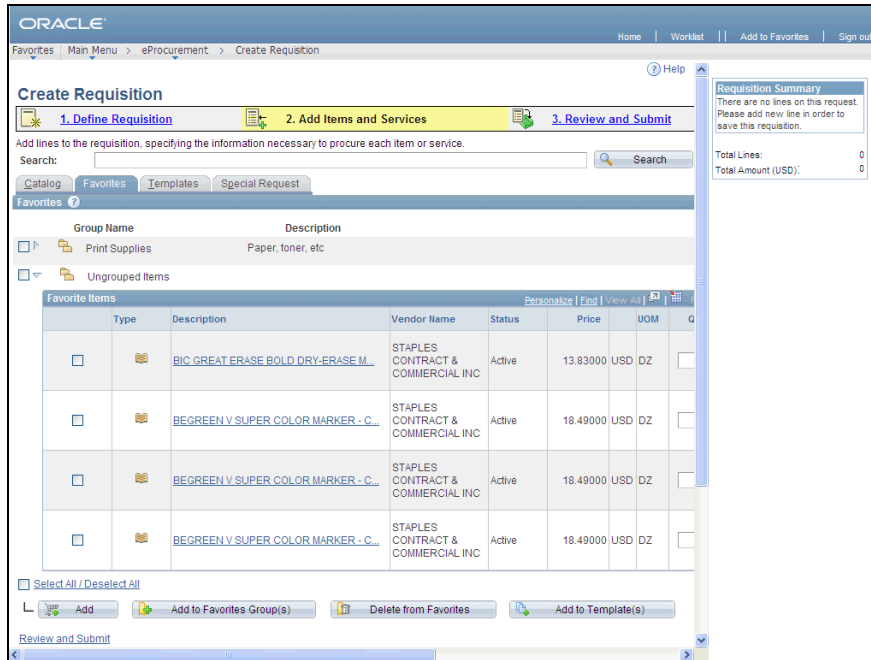
Step	Action
4.	Click the Group Select option. <input type="checkbox"/>
5.	Click the checkbox to exclude the item from the new template. <input checked="" type="checkbox"/>
6.	Enter 5 into the Quantity field.

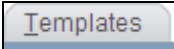


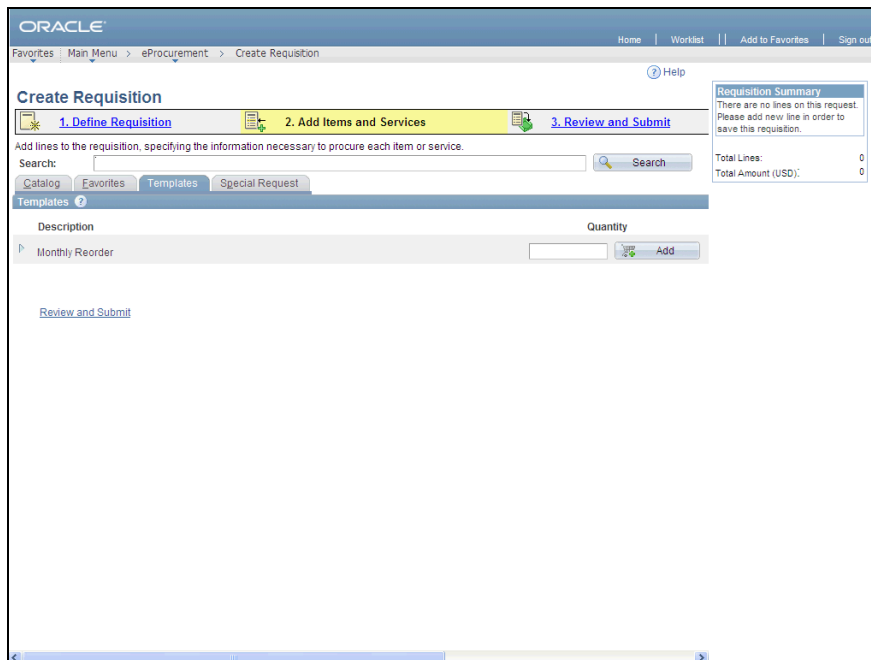
Step	Action
7.	Click the scrollbar.




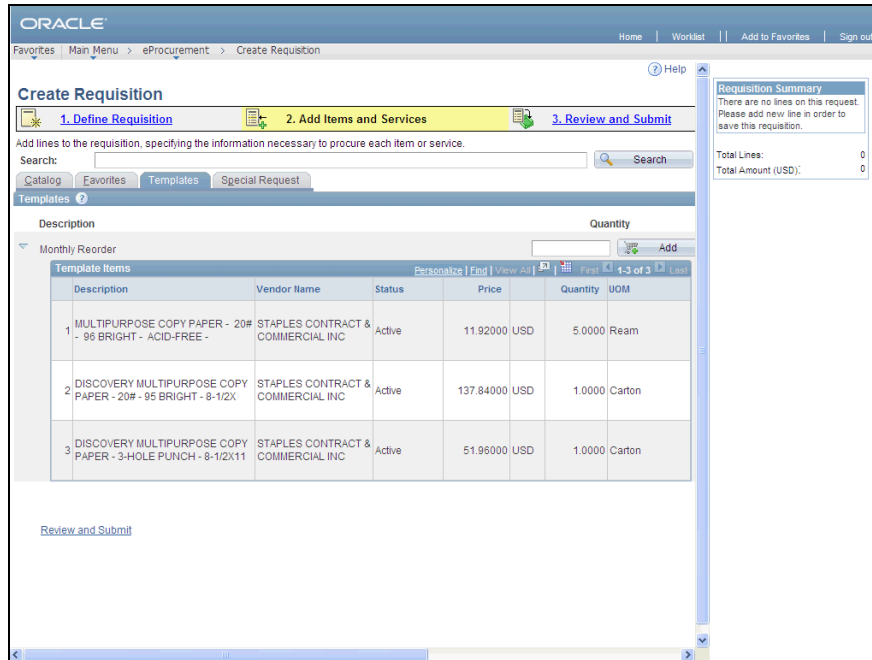
Step	Action
8.	Enter Staples Paper into the Template Name field.
9.	Enter Monthly Reorder into the Description field.
10.	Click the OK button. 

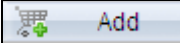



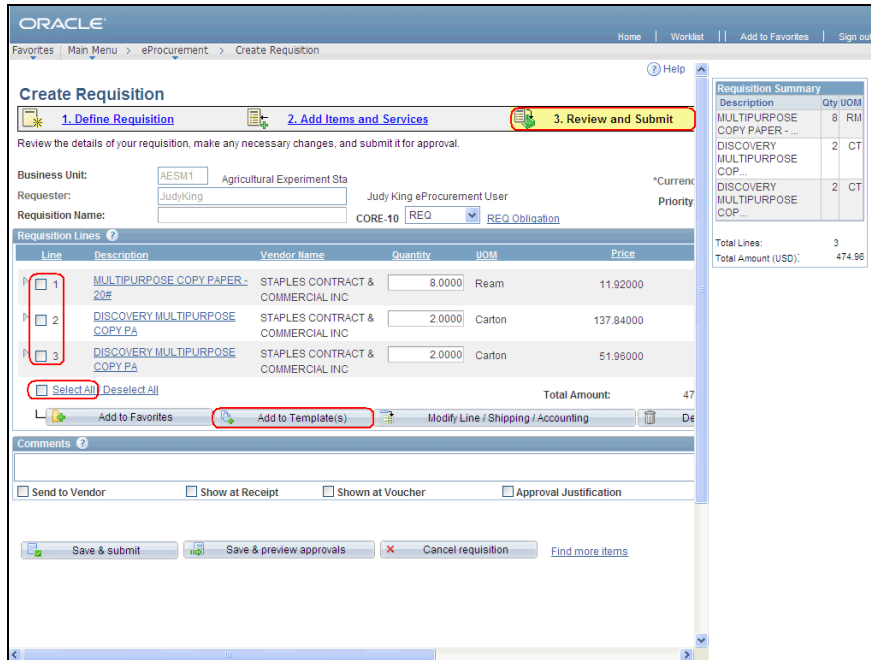
Step	Action
11.	Click the Templates tab. 



Step	Action
12.	<p>Monthly Reorder template is now listed.</p> <p>Click the Expand Section button.</p> 



Step	Action
13.	<p>The group box expands to display the items in the Template.</p> <p>Enter 2 into the Add field.</p>
14.	<p>Click the Add button.</p> 
15.	<p>The Requisition Summary displays that double the quantity of the template has been added to the requisition.</p> <p>Click the 3. Review and Submit link.</p> 



Step	Action
16.	The Review and Submit page displays. Requisition lines can also be added to templates from this page without having to save and submit the requisition.
17.	End of Procedure.