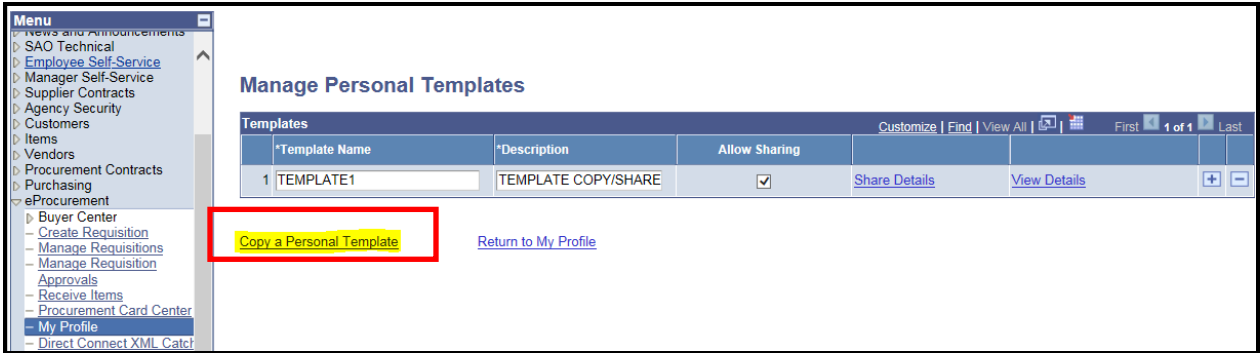
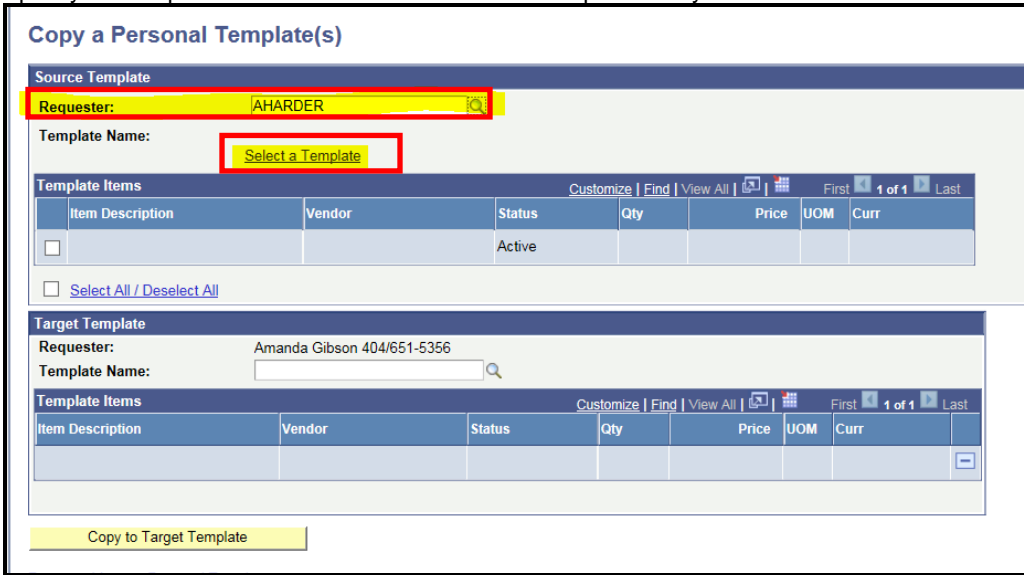


eProcurement

How to Copy a Shared ePro Template Quick Reference Guide

Use this guide for copying ePro Templates, created by other users that have been shared with you. Templates are useful for quickly creating a requisition containing items that are typically and frequently requested together. Use of templates prevent repetitive entry of item information and expedite order creation and dispatching to vendors.

*Please remember that Templates should never include contract items (items available from the virtual catalog) as prices and item information are subject to (sometimes frequent) change and, therefore, requests for catalog/contract items should always originate from a cart.

Step	Description
1.	Sign into PeopleSoft
2.	Navigate to eProcurement > My Profile > Manage Personal Templates
3.	To copy a shared template for use as your own, you will need to: <ul style="list-style-type: none"> Navigate to eProcurement > My Profile > Manage Personal Templates Click the 'Copy a Personal Template' hyperlink as shown below:
	
4.	Specify the Requester ID of the user that shared a template with you and click the "Select A Template" hyperlink:
	
5.	Click on the hyperlink of the Template name that was shared with you and that you wish to copy for your personal use:

eProcurement

How to Copy a Shared ePro Template Quick Reference Guide

Step	Description
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Select Template

Requester: AHARDER

Templates	
Favorites Groups	Description
TEMPLATE1	TEMPLATE COPY/SHARE TEST

6. At this point, you have the option to:

- Select individual lines from the template by clicking the checkbox next to specific line, or
- Select all lines by clicking the “Select All/Deselect All” hyperlink

Copy a Personal Template(s)

Source Template

Requester: AHARDER

Template Name: TEMPLATE1 TEMPLATE COPY/SHARE TEST [Select a Template](#)

Template Items							
	Item Description	Vendor	Status	Qty	Price	UOM	Curr
<input checked="" type="checkbox"/>	TEST ITEM #1		Active	1.0000	1.00000	EA	USD
<input checked="" type="checkbox"/>	TEST ITEM #2		Active	2.0000	2.00000	EA	USD
<input checked="" type="checkbox"/>	TEST ITEM #3		Active	3.0000	3.00000	EA	USD

[Select All / Deselect All](#)

Target Template

Requester: Amanda Gibson 404/651-5256

Template Name: AHARDER

Description: My Copied Template from Amanda

Item Description	Vendor	Status	Qty	Price	UOM	Curr
TEST ITEM #1		Active	1.0000	1.00000	EA	USD
TEST ITEM #2		Active	2.0000	2.00000	EA	USD
TEST ITEM #3		Active	3.0000	3.00000	EA	USD

Copy to Target Template

[Return to Manage Personal Templates](#)



Once lines have been selected for copying, you will need to:

- Specify a “Template Name” that you wish to call your new template
- Specify a Description for your new template (this will appear in your personal template list when creating ePro requisitions)
- Click the ‘Copy to Target Template’ pushbutton
- Click ‘Save’

eProcurement

How to Copy a Shared ePro Template Quick Reference Guide

Step	Description				
7.	<p>Congratulations, you have successfully copied a template that was shared with you by another user. Now, your new template will be available on the 'Add Items & Services' > 'Templates' tab as shown below for use in creating new requisitions:</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Create Requisition</p> <p>1. Define Requisition 2. Add Items and Services 3. Review and Submit</p> <p>Add lines to the requisition, specifying the information necessary to procure each item or service.</p> <p>Search: <input type="text"/> <input type="button" value="Search"/></p> <p>Catalog Favorites Templates Forms Web Special Request</p> <p>Templates ?</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 80%;">Description</th> <th style="width: 20%;">Quantity</th> </tr> </thead> <tbody> <tr> <td>▶ My Copied Template from Amanda</td> <td style="text-align: right;"> <input type="text"/> <input type="button" value="Add"/> </td> </tr> </tbody> </table> </div>	Description	Quantity	▶ My Copied Template from Amanda	<input type="text"/> <input type="button" value="Add"/>
Description	Quantity				
▶ My Copied Template from Amanda	<input type="text"/> <input type="button" value="Add"/>				