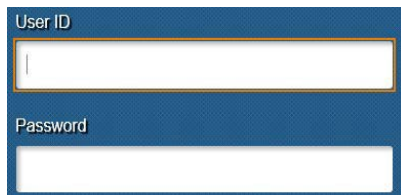# 9.2.38 eProcurement
How to Copy a Shared ePro Template Quick Reference Guide

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.

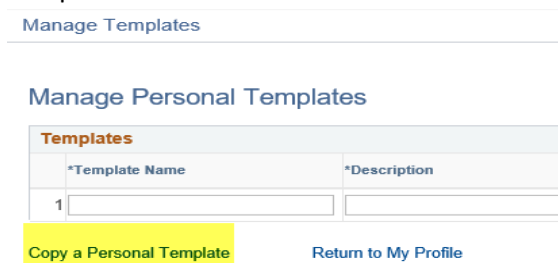| Step	Description

1. Sign into PeopleSoft.

   User ID

   Password

2. Navigate to NavBar > Navigator > eProcurement > My Profile > Manage Personal Templates

   My Profile

   Manage Personal Templates
   Manage Favorites Groups
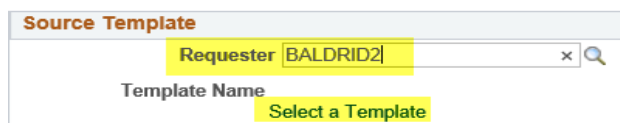
3. To copy a shared template for use as your own, you will need to click the Copy A Personal Template link as shown below:

   Manage Templates

   Manage Personal Templates

Templates	
*Template Name	*Description
1	

   Copy a Personal Template   Return to My Profile

4. Specify the Requester ID of the user that shared a template with you and click the Select A Template link.

   Copy a Personal Template(s)

   Source Template

   Requester BALDRID2

   Template Name
   Select a Template

5. Click on the link of the template name that was shared with you and that you wish to copy for your personal use.

6. At this point, you have the option to select the individual lines by clicking the checkbox next to the specific line or select all lines by clicking the Select All/Deselect All link. Once the lines have been selected for copying you will need to specify a Template Name. Then click Copy to Target Template.

Specify a Description for your new template – this will appear in your personal template list when creating ePro requisitions.

Click Save.

7. Your new template is available on the Create Requisition page under Request Options > Templates.