

9.2.38 eProcurement

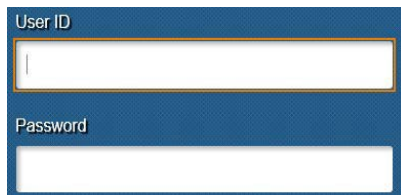
How to Copy a Shared ePro Template Quick Reference Guide

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
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1. Sign into PeopleSoft.



A screenshot of the PeopleSoft login interface. It features a blue header with the text 'User ID' and 'Password'. Below the text are two white input fields with orange borders. The 'User ID' field is above the 'Password' field.

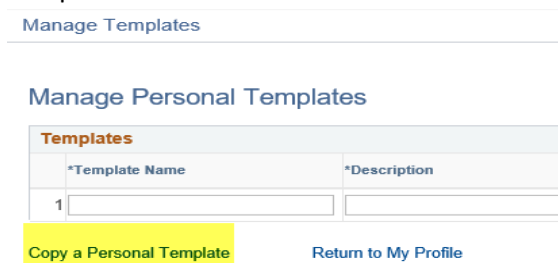
2. Navigate to NavBar > Navigator > eProcurement > My Profile > Manage Personal Templates

My Profile

[Manage Personal Templates](#)

[Manage Favorites Groups](#)

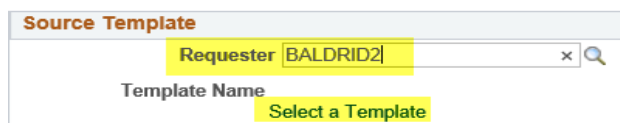
3. To copy a shared template for use as your own, you will need to click the Copy A Personal Template link as shown below:



A screenshot of the 'Manage Personal Templates' page. At the top, there is a header 'Manage Templates'. Below it is a sub-header 'Manage Personal Templates'. A table with the title 'Templates' contains two columns: '*Template Name' and '*Description'. The first row of the table has a '1' in the first column and an empty field in the second. Below the table, there are two buttons: 'Copy a Personal Template' (highlighted in yellow) and '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)



A screenshot of the 'Source Template' selection form. It has a header 'Source Template'. Below it is a 'Requester' field with the value 'BALDRID2' and a search icon. Below that is a 'Template Name' field with a 'Select a Template' button next to it.



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

Select Template

Requester BALDRID2

Templates Personalize | Find |   First 1-2 of 2 Last

Favorites Groups	Description
PASTEL WIDGETS	PASTEL WIDGETS
TEMPLATE TEST 1	TEMPLATE TEST 1



- 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.

Copy a Personal Template(s)

Source Template

Requester BALDRID2

Template Name PASTEL WIDGETS PASTEL WIDGETS Select a Template



Template Items Personalize | Find | View All |   First 1-3 of 3 Last

Item Description	Supplier	Status	Qty	Price	UOM	Curr
<input checked="" type="checkbox"/> PINK WIDGETS		Active	10.0000	10.00000	EA	USD
<input checked="" type="checkbox"/> BLUE WIDGETS		Active	10.0000	15.00000	EA	USD
<input checked="" type="checkbox"/> IVORY WIDGETS		Active	4.0000	25.00000	EA	USD
<input checked="" type="checkbox"/> Select All / Deselect All						

Target Template

Requester Timothy Swink 404/631-1367

Template Name My Copied Temp From Baldridge x

Template Items Personalize | Find | View All |   First 1 of 1 Last

Item Description	Supplier	Status	Qty	Price	UOM	Curr

Copy to Target Template



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

Target Template

Requester Timothy Swink 404/631-1367

Template Name My Copied Temp From Baldridge

Description PASTEL WIDGETS

Template Items Personalize | Find | View All |   First 1-3 of 3 Last

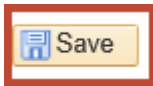
Item Description	Supplier	Status	Qty	Price	UOM	Curr
PINK WIDGETS		Active	10.0000	10.00000	EA	USD
BLUE WIDGETS		Active	10.0000	15.00000	EA	USD
IVORY WIDGETS		Active	4.0000	25.00000	EA	USD

Copy to Target Template


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Click Save.



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

Request Options 

Web

[Georgia Virtual Catalogs](#)

[Express Item Entry](#)

[Special Requests](#)

[Favorites](#)

Templates

[ePro Services](#)

[Fixed Cost Service](#)

[Variable Cost Service](#)

[Time and Materials](#)

Templates 



PASTEL WIDGETS