

9.2.38 eProcurement

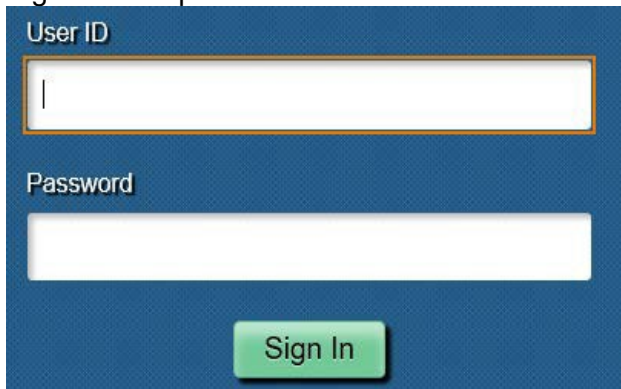
How to Share ePro Templates Quick Reference Guide

Use this guide for sharing personal ePro Requisition Templates with other users. 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.

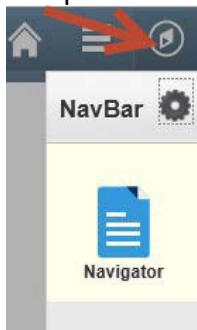
*Please remember that Templates should never include contract items (items available from the virtual catalog) as prices and item information are subject to (sometimes frequent) change and, therefore, requests for catalog/contract items should always originate from a cart.

Step	Description
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1. Sign into PeopleSoft.



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



3. On the Manage Personal Template page:
 - Click the 'Allow Sharing' checkbox next to the Template you wish to share with others then
 - Click the 'Share Details' hyperlink

Manage Personal Templates

*Template Name	*Description	Allow Sharing	Share Details	View Details	
1 PASTEL WIDGETS x	PASTEL WIDGETS	<input checked="" type="checkbox"/>	Share Details	View Details	+ -
2 TEMPLATE TEST 1	TEMPLATE TEST 1	<input checked="" type="checkbox"/>	Share Details	View Details	+ -

4. On the Share Details page, you have the option to
 - Select and share a template with a single userid or multiple userids by clicking the + symbol,
 - Specify a 'Role Name', or multiple role names to allow access for any userid assigned this role(s), or
 - Select the 'Share with ALL Roles and Requesters' checkbox to share with all userids

