

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.

Description

Step

1.

Jon.	
Sign In	
	5011.

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

Templates		Persona	alize Find View All	🔊 🔜 🛛 First 🕚 1-2	of 2 🕑 Last
*Template Name	*Description	Allow Sharing			
1 PASTEL WIDGETS	× PASTEL WIDGETS		Share Details	View Details	+ -
2 TEMPLATE TEST 1	TEMPLATE TEST 1		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

Share with All Roles and Requesters

Ro	les	Pe	rsonalize Find View All 💷 🔜	First 🤇	1 of 1	Last
	Role Name		Description			
1		Q				+ -
Re	questers	Pe	rsonalize Find View All 💷 🔜	First	1 of 1) Last
	User ID		Description			
1		Q				+ -

- Click OK after specifying the users with which you wish to share the template, then
- Click Save to successfully share the template and allow the 'shared' user(s) access to copy the template for their use. Refer to "How to Copy a Shared ePro Template QRG".