

# Managing Favorites Groups in My Profile

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## Managing Favorites Groups in My Profile



Creating favorites, maintaining favorite items, and deleting favorite groups can be accomplished in **Create Requisitions**. These and other options have been added to the **My Profile** component of eProcurement.

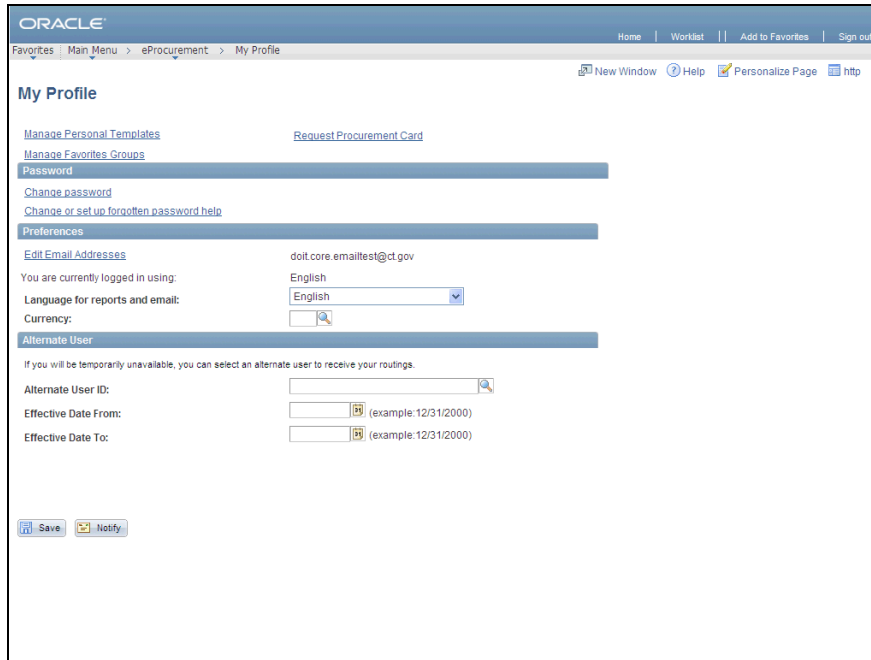
The options are:

- Editing Favorites Group Names and Descriptions
- Viewing/deleting the items in a group
- Adding/Deleting Groups
- Sharing Groups
- Copying Favorites Groups shared from another requester

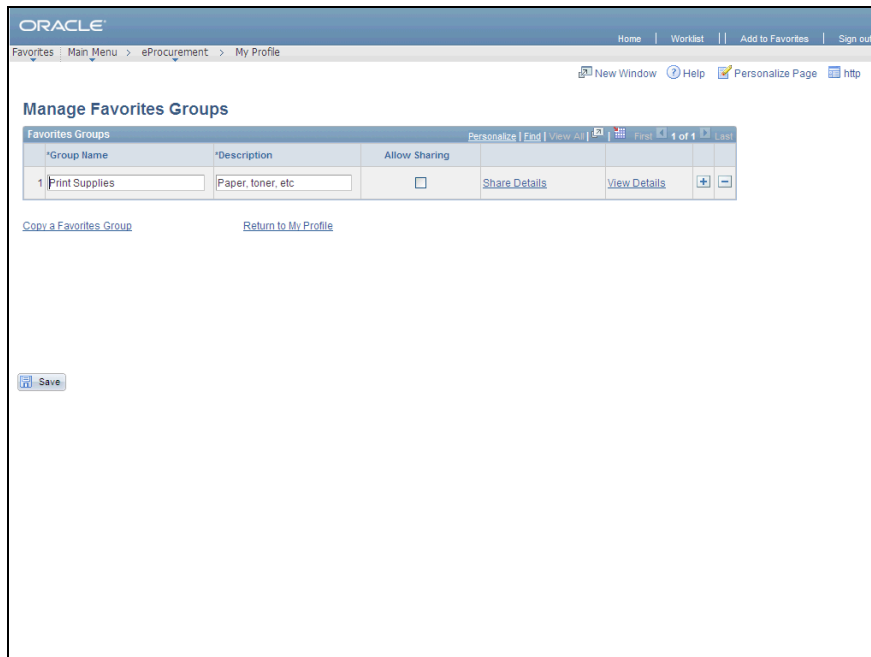
In this example a requester reviews the items in an existing group and allows the group to be shared with another requester. A new group is created and items added to it by copying them from another user's **Favorites Group**.

### Procedure

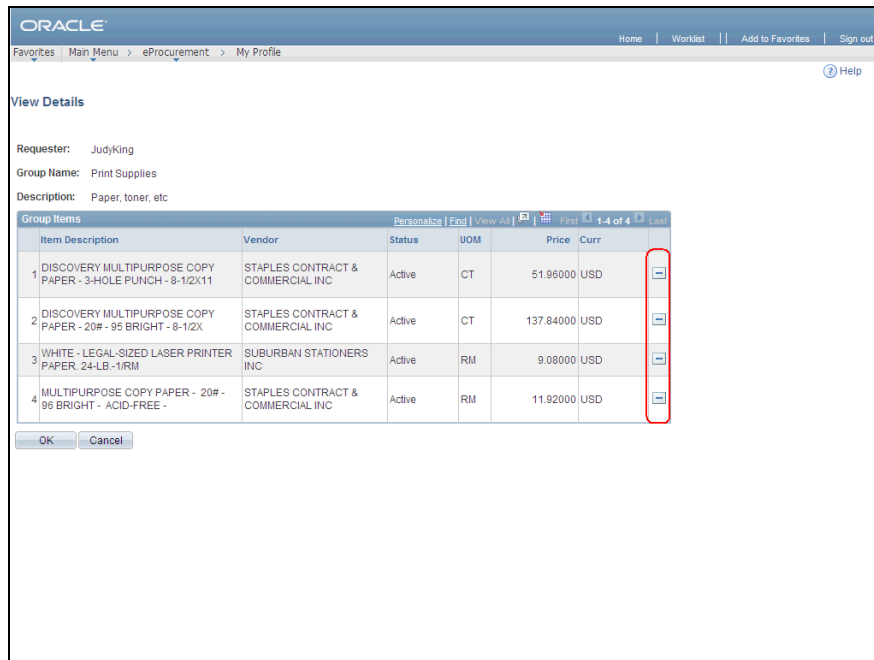
Navigation: eProcurement > My Profile



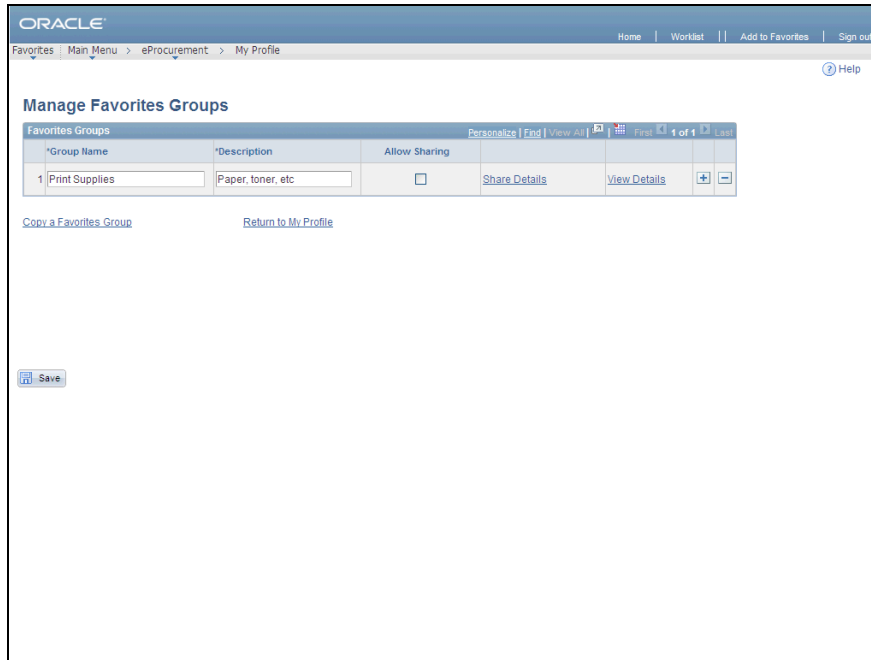
| Step | Action  |
|------|---|
| 1.   | Click the <b>Manage Favorites Groups</b> link.<br><a href="#">Manage Favorites Groups</a> |



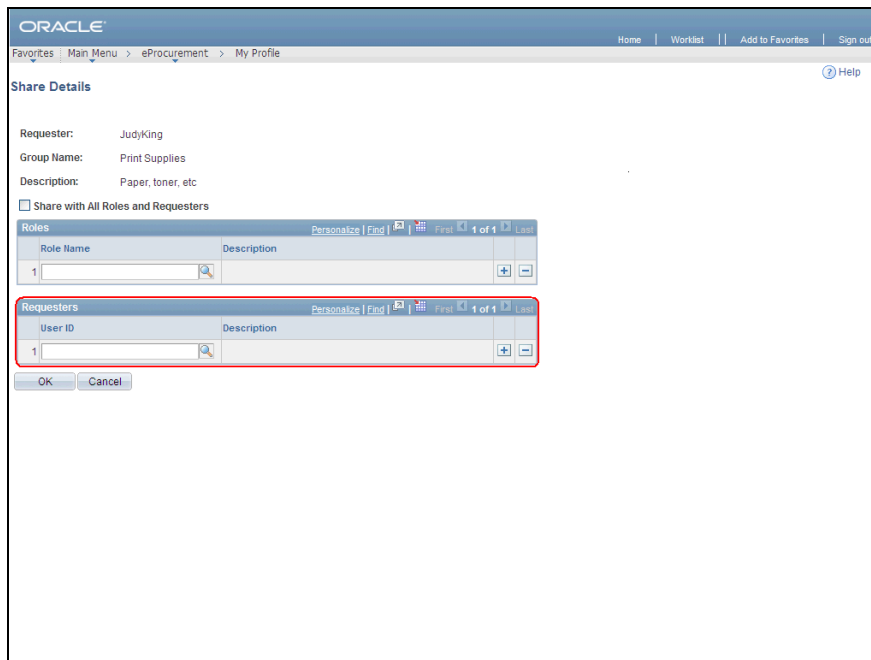
| Step | Action   |
|------|--|
| 2.   | Requesters can: <ul style="list-style-type: none"> <li>- Change <b>Group Name</b> and <b>Description</b></li> <li>- View the items in a group</li> <li>- Share groups</li> <li>- Copy groups from other requesters providing they have shared their groups with this requester.</li> </ul> |
| 3.   | Click the <b>View Details</b> link to view or edit the items in the group.<br><a href="#">View Details</a>   |

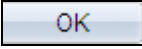


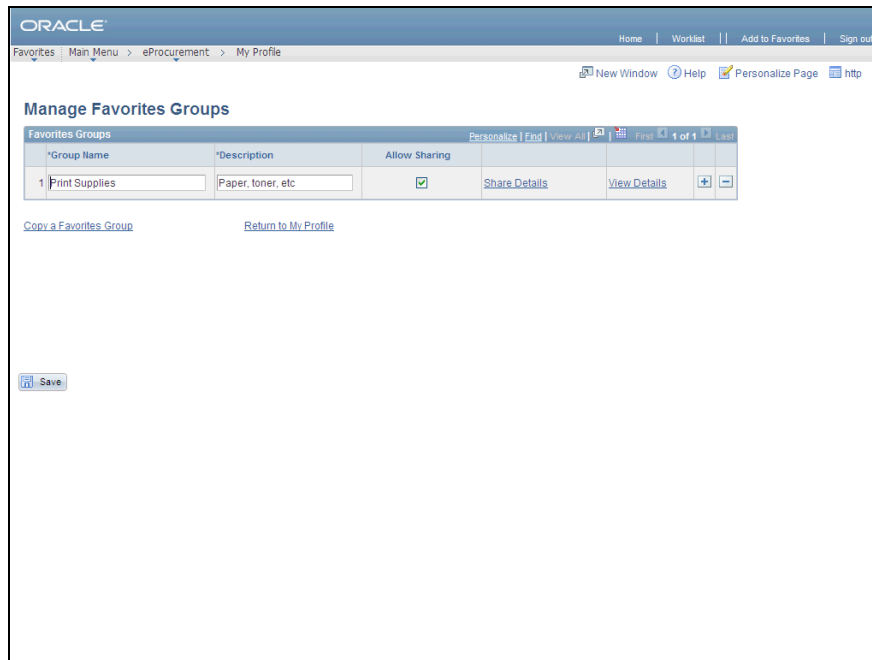
| Step | Action  |
|------|---|
| 4.   | Items can only be added from the <b>Create Requisition</b> component but can be removed here by clicking the minus button on a row.<br><br>Click the <b>OK</b> button to return to the <b>Manage Favorite Groups</b> page,<br><input type="button" value="OK"/> |

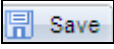



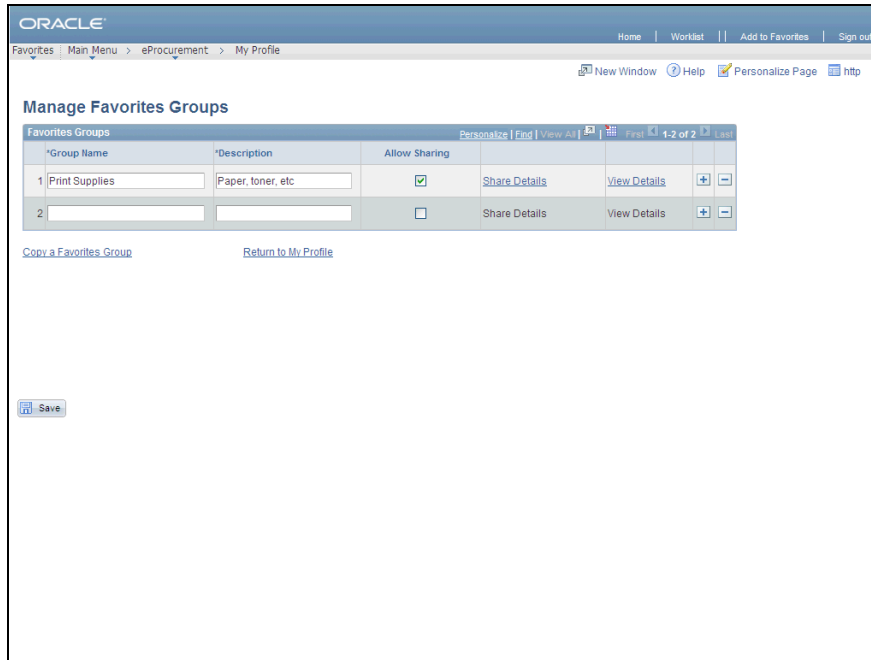
| Step | Action  |
|------|---|
| 5.   | Click the <b>Allow Sharing</b> checkbox to share Favorites Groups.<br><input type="checkbox"/>                          |
| 6.   | Click the <b>Share Details</b> link to manage the requesters that can copy this group.<br><a href="#">Share Details</a> |

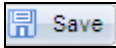
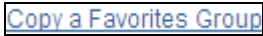


| Step | Action  |
|------|---|
| 7.   | The <b>Share with All Roles and Requesters</b> and the <b>Roles</b> options are not used in Core-CT.<br><br>Use the <b>Requesters</b> group box to specify requesters that can access this group. |
| 8.   | Enter <b>CoreShankmanArthur</b> into the <b>User ID</b> field.  |
| 9.   | Click the <b>OK</b> button.<br>  |



| Step | Action   |
|------|--|
| 10.  | Click the <b>Save</b> button.<br>   |
| 11.  | Click the <b>Add a new row</b> button to add a new <b>Favorites Group</b> .<br> |



| Step | Action   |
|------|--|
| 12.  | Enter <b>Stapler</b> into the <b>Group Name</b> field.   |
| 13.  | Enter <b>Stapler supplies</b> into the <b>Description</b> field.   |
| 14.  | Click the <b>Save</b> button.<br>                 |
| 15.  | Click the <b>Copy a Favorites Group</b> link.<br> |

ORACLE  
 Favorites | Main Menu > eProcurement > My Profile  
 Home | Worklist | Add to Favorites | Sign out  
 New Window | Help | Personalize Page | http

### Copy a Favorites Group

Source Favorites Group

Requester:

Group Name: [Select a Group](#)

| Group Items              |        |        |       |     |      |  |
|--------------------------|--------|--------|-------|-----|------|--|
| Item Description         | Vendor | Status | Price | UOM | Curr |  |
| <input type="checkbox"/> |        |        |       |     |      |  |

Select All / Deselect All

Target Favorites Group

Requester: Judy King eProcurement User

Group Name:

| Group Items      |        |        |       |     |      |  |
|------------------|--------|--------|-------|-----|------|--|
| Item Description | Vendor | Status | Price | UOM | Curr |  |
|                  |        |        |       |     |      |  |

[Return to Manage Favorites Groups](#)


| Step | Action   |
|------|--|
| 16.  | Select a <b>Source Favorites Group</b> to copy then specify a group as the <b>Target Favorites Group</b> . |
| 17.  | Enter <b>COREShankmanArthur</b> into the <b>Requester</b> field.   |
| 18.  | Click the <b>Select a Group</b> link.<br><a href="#">Select a Group</a>                                    |

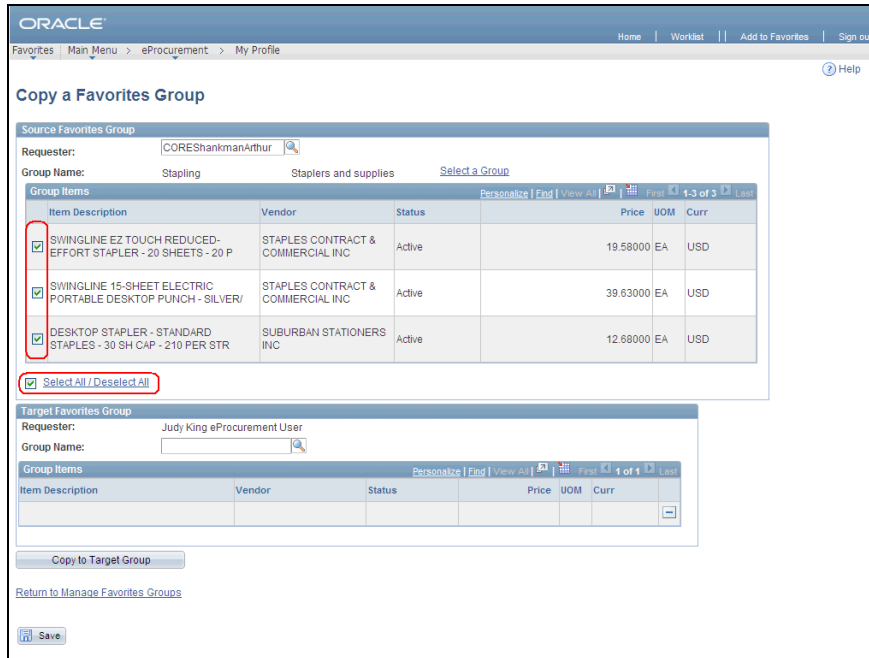
ORACLE  
 Favorites | Main Menu > eProcurement > My Profile  
 Home | Worklist | Add to Favorites | Sign out  
 Help


### Select Group

Requester: COREShankmanArthur

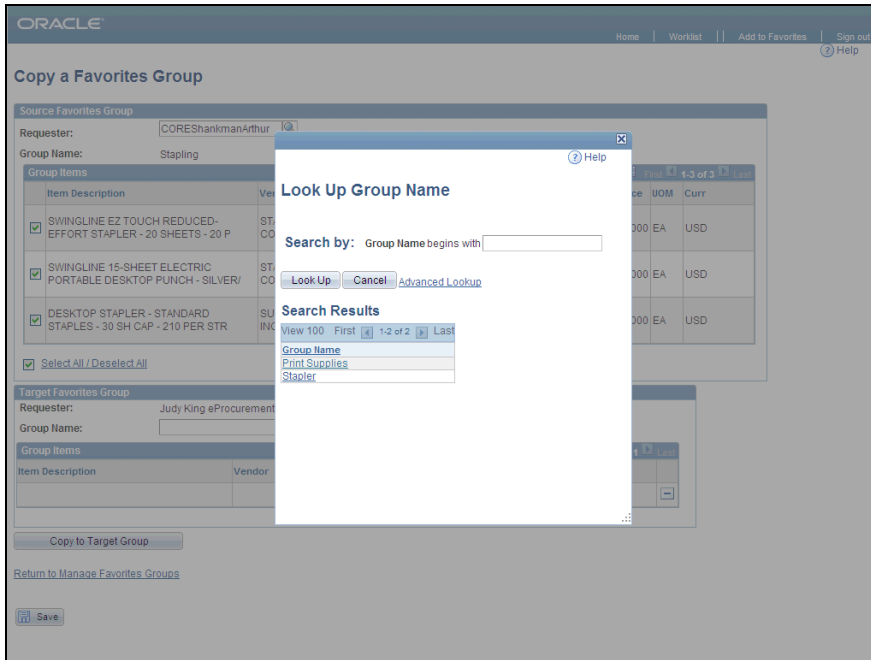
| Favorites Groups                 |                       |
|----------------------------------|-----------------------|
| Favorites Groups                 | Description           |
| <a href="#">Printer Supplies</a> | Paper, toner etc      |
| <a href="#">Stapling</a>         | Staplers and supplies |


| Step | Action  |
|------|---|
| 19.  | <p>Only the groups shared with this requester are listed.</p> <p>Click the <b>Stapling</b> link.</p> <p></p> |

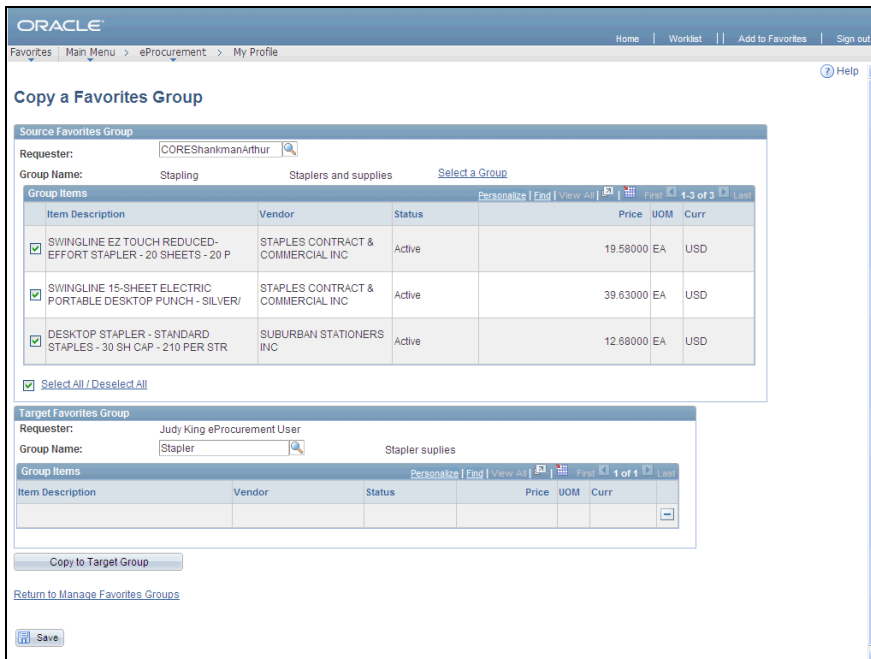


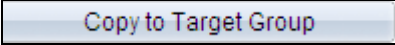
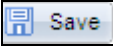
| Step | Action  |
|------|---|
| 20.  | The requester has the option to select/deselect items to copy.  |
| 21.  | <p>Items can be copied to a new or existing favorites group.</p> <p>Click the <b>Group Name</b> lookup button.</p> <p></p> |

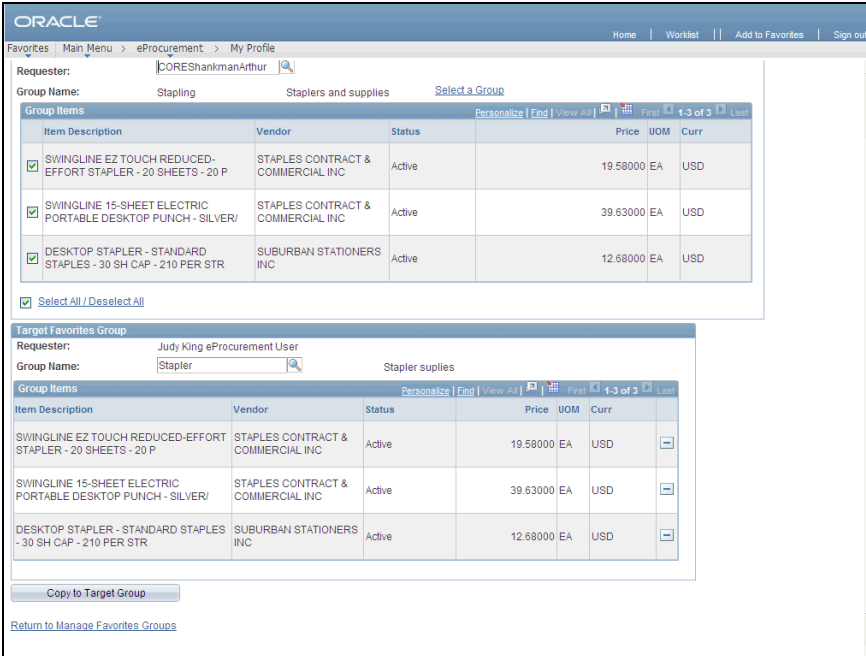




| Step | Action   |
|------|--|
| 22.  | Click the <b>Stapler</b> link.<br> |



| Step | Action   |
|------|--|
| 23.  | Click the <b>Copy to Target Group</b> button.<br> |
| 24.  | The group items are copied to the target group.<br><br>Click the scrollbar.  |
| 25.  | Click the <b>Save</b> button.<br>                 |

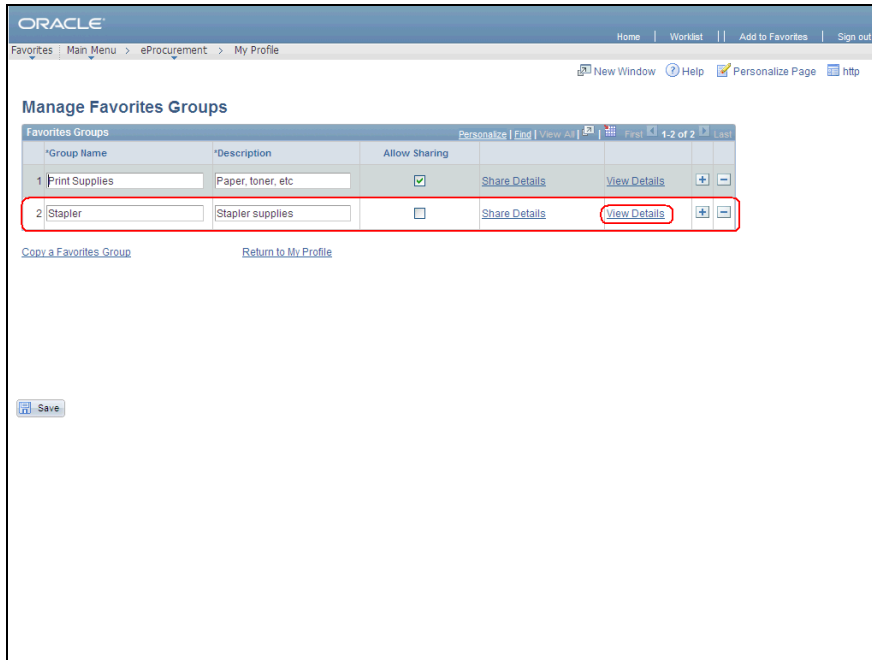


The screenshot displays the Oracle eProcurement interface. At the top, the Oracle logo and navigation links (Home, Worklist, Add to Favorites, Sign out) are visible. The breadcrumb trail shows 'Favorites | Main Menu > eProcurement > My Profile'. The 'Requester' field is set to 'COREShankmanArthur'. The 'Group Name' is 'Stapling', and the 'Select a Group' dropdown shows 'Staplers and supplies'. The 'Group Items' table contains the following data:

| Item Description   | Vendor                            | Status | Price    | UOM | Curr |
|--|-----------------------------------|--------|----------|-----|------|
| SWINGLINE EZ TOUCH REDUCED-EFFORT STAPLER - 20 SHEETS - 20 P | STAPLES CONTRACT & COMMERCIAL INC | Active | 19.58000 | EA  | USD  |
| SWINGLINE 15-SHEET ELECTRIC PORTABLE DESKTOP PUNCH - SILVER/ | STAPLES CONTRACT & COMMERCIAL INC | Active | 39.63000 | EA  | USD  |
| DESKTOP STAPLER - STANDARD STAPLES - 30 SH CAP - 210 PER STR | SUBURBAN STATIONERS INC           | Active | 12.68000 | EA  | USD  |

Below the table, there is a 'Select All / Deselect All' checkbox. The 'Target Favorites Group' window shows the same items copied to a new group named 'Stapler supplies'. The 'Requester' is 'Judy King eProcurement User'. The 'Group Items' table in the target group is identical to the source group. A 'Copy to Target Group' button is located at the bottom of the target group window. A 'Return to Manage Favorites Groups' link is also present.

| Step | Action  |
|------|---|
| 26.  | Click the <b>Return to Manage Favorites Groups</b> link.<br> |



| Step | Action   |
|------|--|
| 27.  | The <b>View Details</b> link is active indicating the group contains the copied items. |
| 28.  | <b>End of Procedure.</b>   |