

# Managing Personal Templates in My Profile

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## Managing Personal Templates in My Profile



In Core-CT 8.9 requesters had the option of creating **Personal Templates** at the save step for creating a requisition. The template name and items(an exact copy of the requisition) could not be edited. With the upgrade the basic tasks of creating templates, maintaining items, and deleting templates can be done in **Create Requisitions**. These and other advanced options for managing templates have been added to the **My Profile** component of eProcurement.

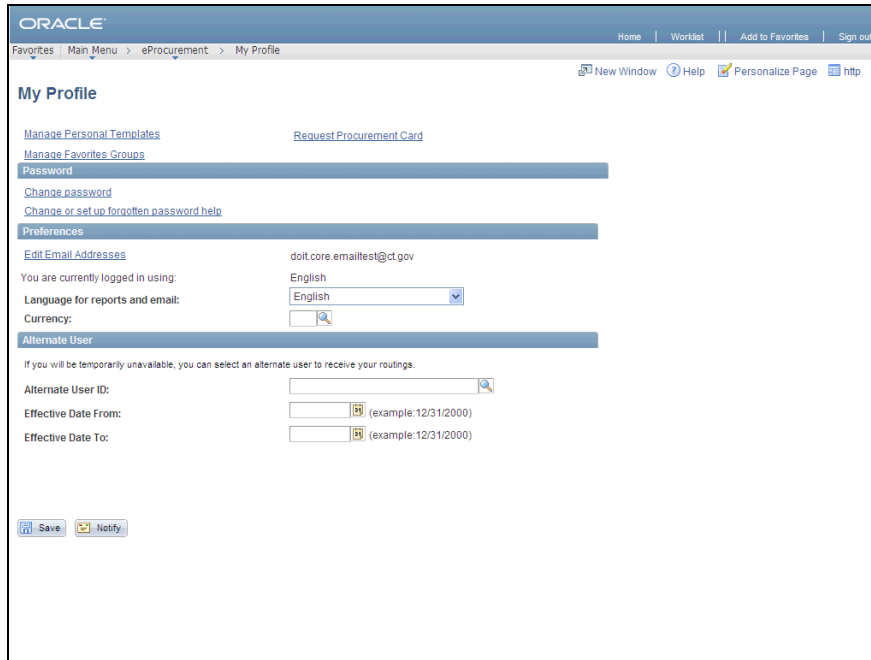
The options are:



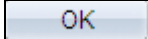


- Adding/Deleting Templates
- Editing Template Names and Descriptions
- Viewing/deleting the items in a Personal Template
- Sharing Templates with other requesters
- Copying Templates shared from another requester

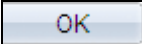
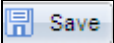
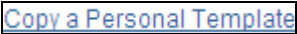
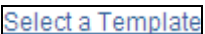

In this example a requester shares a template with another requester. A new group is created and items added to it by copying them from another user's **Personal Template**.

### Procedure

Navigation: eProcurement > MyProfile



Step	Action
1.	Click the <b>Manage Personal Templates</b> link. 
2.	The <b>Manage Personal Templates</b> page displays.  Requesters can:  <ul style="list-style-type: none"> <li>- Change the <b>Template Name</b> and <b>Description</b></li> <li>- Share templates with other requesters in their business unit</li> <li>- Delete items from templates</li> <li>- Add/Delete templates</li> <li>- Copy templates shared by other requesters</li> </ul>
3.	Click the <b>View Details</b> link to view the items in the template. 
4.	The <b>View Details</b> page displays.  Requesters have the ability to edit quantities or remove items.  Click the <b>OK</b> button. 
5.	Click the <b>Allow Sharing</b> option. 
6.	Click the <b>Share Details</b> link. 

Step	Action
7.	<p>The <b>Share with All roles and Requesters</b> and the <b>Roles</b> options are not used in Core-CT.</p> <p>Use the <b>Requesters</b> group box to specify the requesters that will be allowed to access this template.</p>
8.	Enter <b>COREShankmanArthur</b> into the <b>User ID</b> field.
9.	<p>Click the <b>OK</b> button.</p> 
10.	<p>Click the <b>Save</b> button.</p> 
11.	<p>The users are now able to share the specified template.</p> <p>Click the <b>Copy a Personal Template</b> link.</p> 
12.	To copy a Personal Template: select a <b>Source Template</b> to copy, then specify an existing or new template as the <b>Target Template</b> .
13.	Enter <b>COREShankmanArthur</b> into the <b>Requester</b> field.
14.	<p>Click the <b>Select a Template</b> link.</p> 
15.	<p>Only the templates shared with this requester are displayed.</p> <p>Click the <b>Monthly Marker Order</b> link.</p> 
16.	The <b>Template Items</b> display as checked. The requester has the option to select/deselect items.

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > My Profile

Help

### Copy a Personal Template(s)

**Source Template**

Requester: COREShankmanArthur

Template Name: Monthly Marker Order    Marker Order from Staples    [Select a Template](#)

Item Description	Vendor	Status	Qty	Price	UOM	Curr
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - RED	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - BLA	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD
<input checked="" type="checkbox"/> BIC GREAT ERASE BOLD DRY- ERASE MARKERS - CHISEL TIP - BLACK	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	13.83000	DZ	USD
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - BLU	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD

[Select All / Deselect All](#)

**Target Template**

Requester: Judy King eProcurement User

Template Name:

Item Description	Vendor	Status	Qty	Price	UOM	Curr

[Return to Manage Personal Templates](#)

Step	Action
17.	The items can be copied to a new or existing template.  Enter <b>Monthly Marker Order</b> in the <b>Template Name</b> field..

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Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > eProcurement > My Profile

Help

### Copy a Personal Template(s)

**Source Template**

Requester: COREShankmanArthur

Template Name: Monthly Marker Order    Marker Order from Staples    [Select a Template](#)

Item Description	Vendor	Status	Qty	Price	UOM	Curr
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - RED	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - BLA	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD
<input checked="" type="checkbox"/> BIC GREAT ERASE BOLD DRY- ERASE MARKERS - CHISEL TIP - BLACK	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	13.83000	DZ	USD
<input checked="" type="checkbox"/> BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - BLU	STAPLES CONTRACT & COMMERCIAL INC	Active	1.0000	18.49000	DZ	USD

[Select All / Deselect All](#)

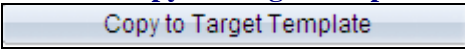
**Target Template**

Requester: Judy King eProcurement User

Template Name:

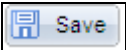
Item Description	Vendor	Status	Qty	Price	UOM	Curr

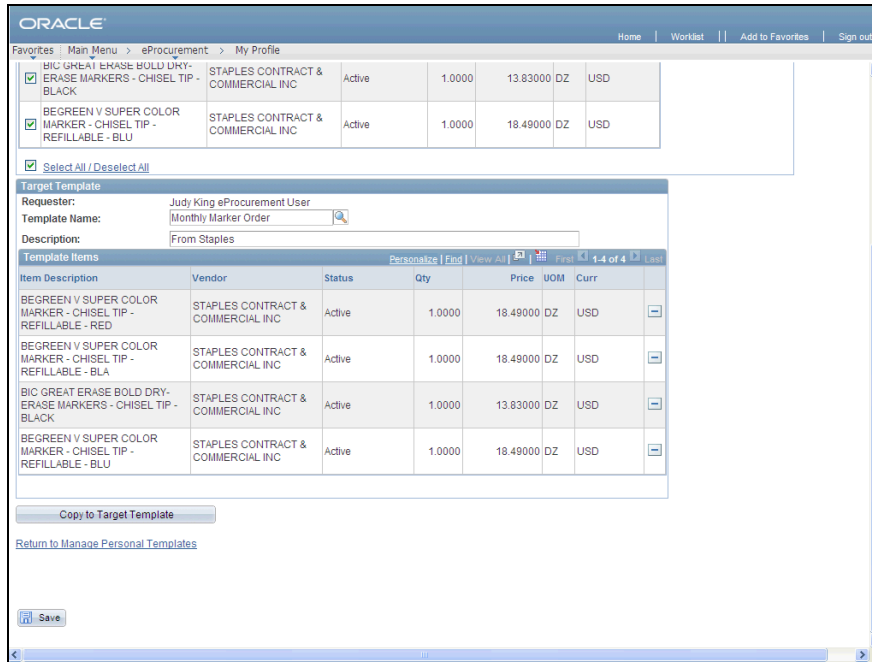
[Return to Manage Personal Templates](#)

Step	Action
18.	Click the <b>Copy to Target Template</b> button. 
19.	Enter <b>From Staples</b> into the required <b>Description</b> field for a new template.
20.	Click the scrollbar.



The screenshot shows the Oracle eProcurement interface. At the top, there is a navigation bar with 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. Below this is a breadcrumb trail: 'Favorites | Main Menu > eProcurement > My Profile'. The main content area displays a list of items with checkboxes. Two items are checked: 'BIC GREAT ERASE BOLD DRY-ERASE MARKERS - CHISEL TIP - BLACK' and 'BEGREEN V SUPER COLOR MARKER - CHISEL TIP - REFILLABLE - BLU'. Below the list is a 'Select All / Deselect All' button. The 'Target Template' section is visible, showing 'Requester: Judy King eProcurement User', 'Template Name: Monthly Marker Order', and 'Description: From Staples'. Below this is a table of 'Template Items' with columns for Item Description, Vendor, Status, Qty, Price, UOM, and Curr. The table contains four rows of items. At the bottom of the 'Target Template' section is a 'Copy to Target Template' button. Below the button is a link 'Return to Manage Personal Templates' and a 'Save' button.

Step	Action
21.	Click the <b>Save</b> button. 



Step	Action
22.	Click the <b>Return to Manage Personal Templates</b> link. <a href="#">Return to Manage Personal Templates</a>
23.	The new template is listed.
24.	<b>End of Procedure.</b>