

## Quick Reference Tip Sheet

LAST REVISED DATE: 03/01/2016

### General Information

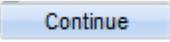
Task	Process Information
Creating an eProcurement Requisition	<p>A requisition is created in the eProcurement module for goods/services.</p> <p><b>NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:</b> Per the FY15 Procurement Policy Change, Receipts <u>will no longer be REQUIRED</u> for <u>Services</u> under Corporate POs (POs created by DPCGA). However, receipts are required for all Goods received, and POs created by DPCGA for Goods will be set to Receipt Required. If you have purchases from a vendor for both Goods and Services, please make sure you create separate lines on your Requisition, so separate lines will be created on your PO. If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required. If you want Receipts for Services on your PO, please indicate this request on your Requisition.</p>

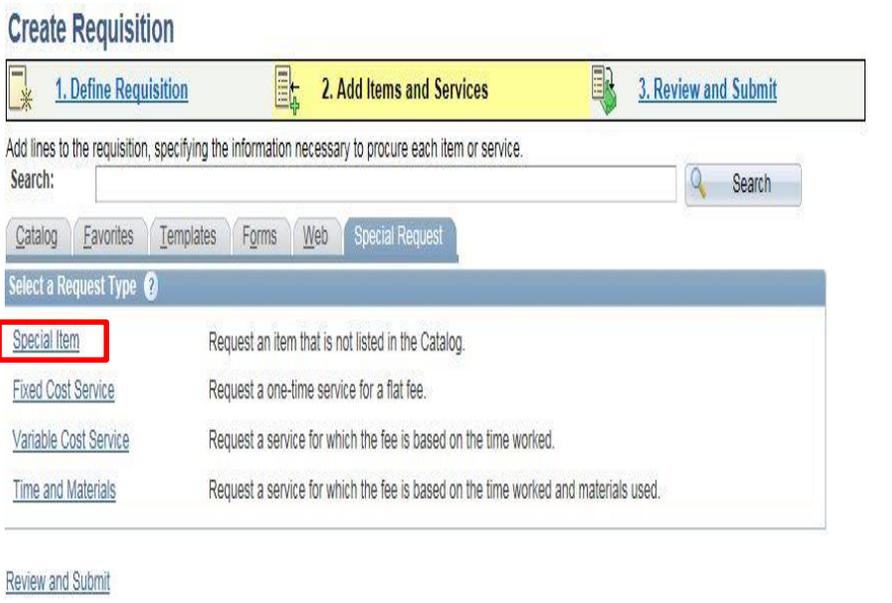
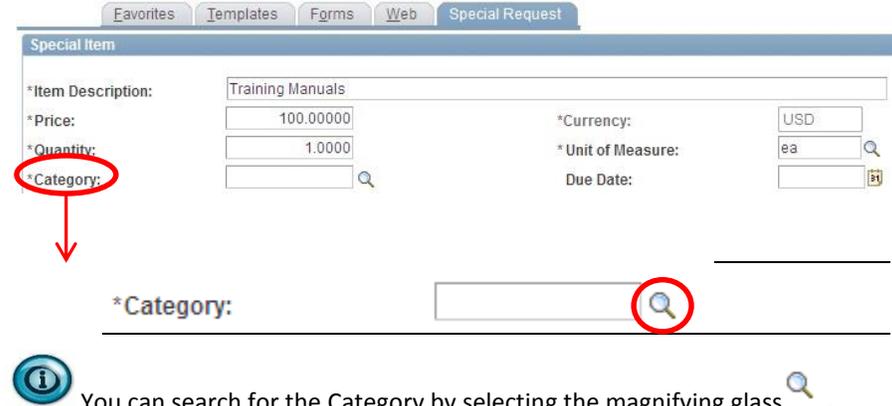
### GEARS Navigation

eProcurement > Create Requisition	
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### 1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.

STEP	ACTION	DETAILS
1.	On the  <b>1. Define Requisition</b> screen, define your requisition by giving it a name.	<p><b>NOTE:</b> It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, <i>AY15 Sharp Maint Renew</i>.</p> <p>Requisition Name: <input type="text"/></p>
2.	Click the  button.	

<p><b>3.</b></p>	<p>On the <b>2. Add Items and Services</b> screen, click the <a href="#">Special Item</a> link.</p>	 <p><b>Create Requisition</b></p> <p>1. Define Requisition   <b>2. Add Items and Services</b>   3. Review and Submit</p> <p>Add lines to the requisition, specifying the information necessary to procure each item or service.</p> <p>Search: <input type="text"/> Search</p> <p>Catalog Favorites Templates Forms Web <b>Special Request</b></p> <p>Select a Request Type ?</p> <ul style="list-style-type: none"> <li><b>Special Item</b> Request an item that is not listed in the Catalog.</li> <li>Fixed Cost Service Request a one-time service for a flat fee.</li> <li>Variable Cost Service Request a service for which the fee is based on the time worked.</li> <li>Time and Materials Request a service for which the fee is based on the time worked and materials used.</li> </ul> <p><a href="#">Review and Submit</a></p>
<p><b>4.</b></p>	<p>Add items and services.</p>	 <p>Special Item</p> <p>*Item Description: Training Manuals</p> <p>*Price: 100.00000 *Currency: USD</p> <p>*Quantity: 1.0000 *Unit of Measure: ea</p> <p>*Category: <input type="text"/> Due Date: <input type="text"/></p> <p>*Category: <input type="text"/></p> <p>You can search for the Category by selecting the magnifying glass .</p>
<p><b>5.</b></p>	<p>On the <a href="#">Look Up Category</a> screen.</p>	<p>Choose either <a href="#">Search Categories</a> or <a href="#">Browse Category Tree</a> to look up the appropriate category for your requisition.</p>

**5a. NOTE: Do either 5a or 5b.**

To **Search Categories**

**For FY16 transactions and forward:**  
 The **MDJUD Item Catalog** and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog **MDJUD Item Catalog NEW**. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. If you know the appropriate account code for your purchase, the category code will be the same.

For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.

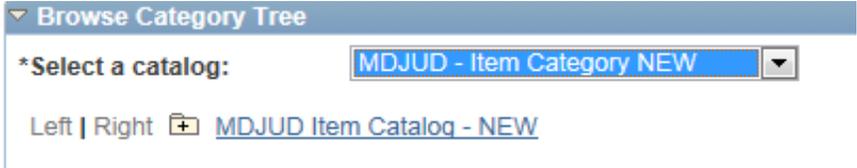
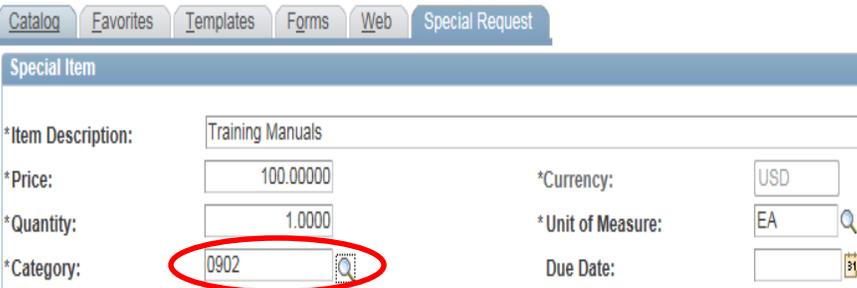
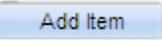
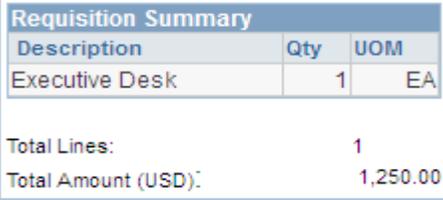
- Use the “Search By” dropdown list to search for goods/services by Category or by Description and then enter the item you wish to procure.

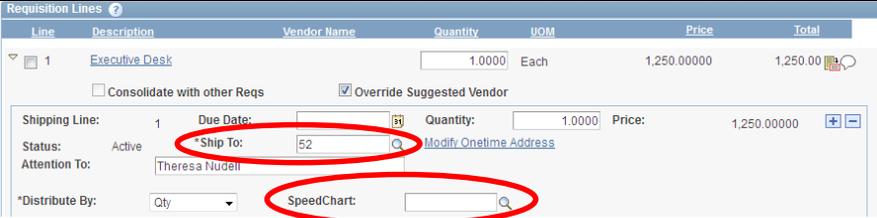
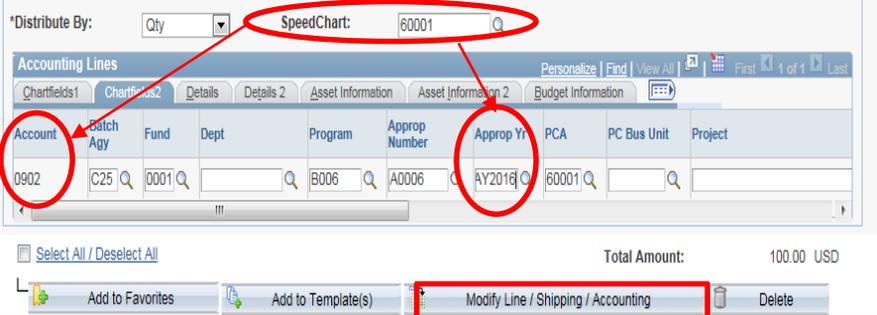
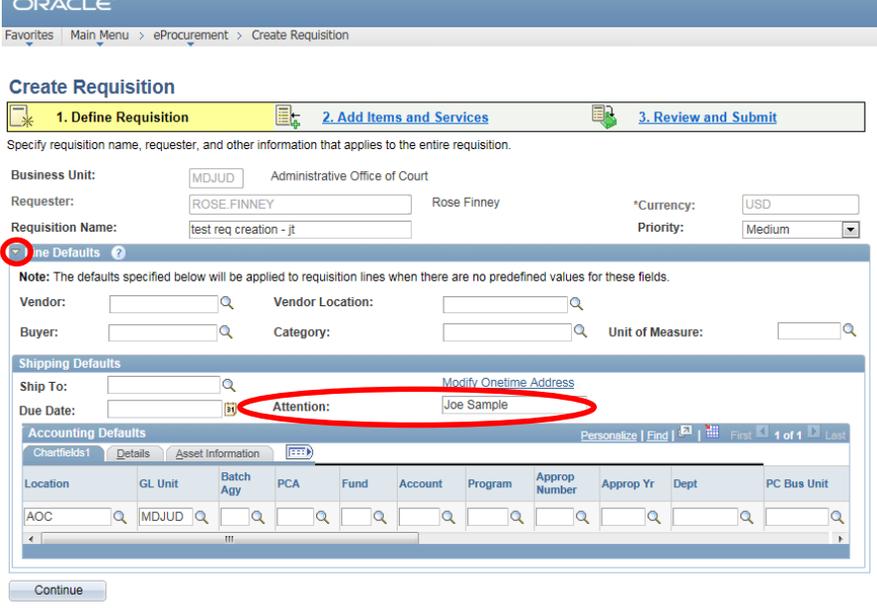
- OR -

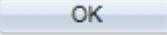
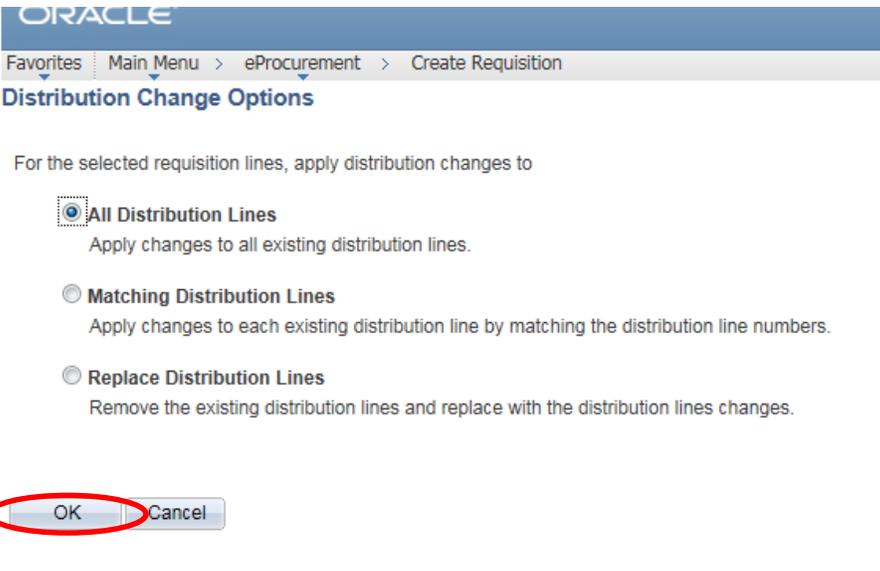
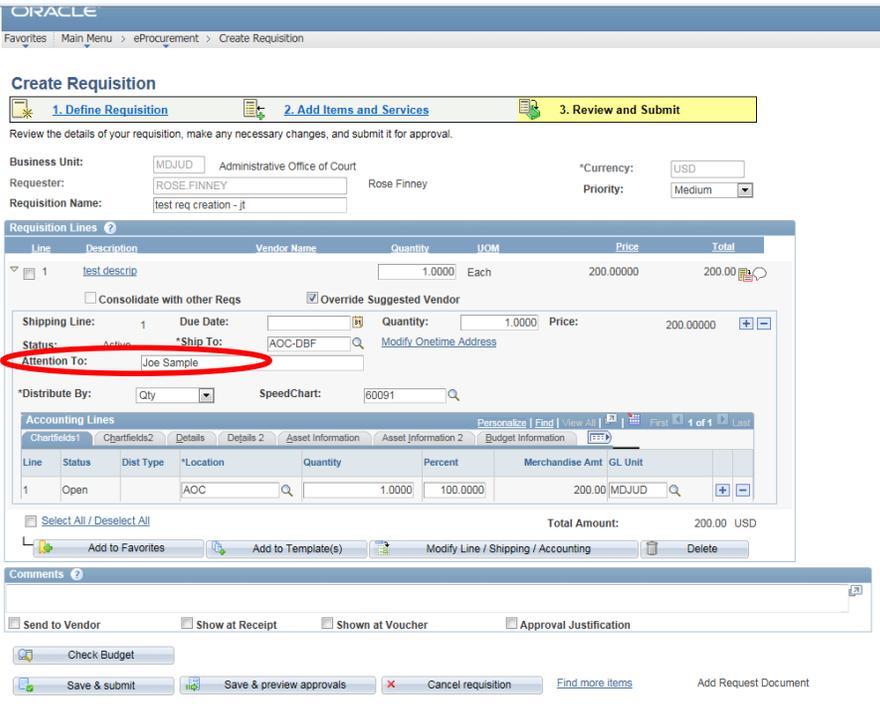
- Click the **Find** button to return a list of results based on your entry.
- Select the row containing the good/service you wish to procure.

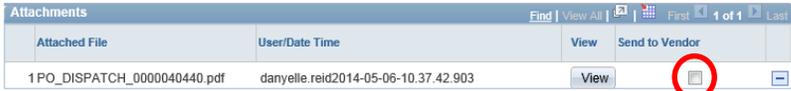
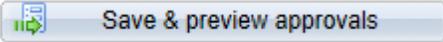
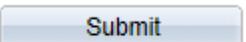
Categories	Category	Description	Find in Tree
1 ITM CTLG MDJUD NEW	0828	0828 - Office Assistance	
2 ITM CTLG MDJUD NEW	0902	0902 - General Office Supplies	
3 ITM CTLG MDJUD NEW	1006	1006 - Office Equipment	
4 ITM CTLG MDJUD NEW	1015	1015 - Office Furniture	
5 ITM CTLG MDJUD NEW	1106	1106 - Office Equipment	
6 ITM CTLG MDJUD NEW	1115	1115 - Office Furniture	

- Your selection will appear in the Category field on the “Add Items and Services” screen.

<p><b>5b.</b></p>	<p><b>NOTE: Do either 5a or 5b.</b></p> <p>To <a href="#">Browse Category Tree</a></p> <p><b>For FY16 transactions and forward:</b> The <b>MDJUD Item Catalog</b> and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog <b>MDJUD Item Catalog NEW</b>. The category codes contained in this new catalog are the same as our existing account codes. This enhancement is intended to eliminate some of the guesswork in choosing a category. <u>If you know the appropriate account code for your purchase, the category code will be the same.</u></p> <p>For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.</p>	<ul style="list-style-type: none"> <li>Expand the section by clicking the .</li> <li>Select a catalog from the dropdown list and click the  to browse the categories within.</li> </ul>  <ul style="list-style-type: none"> <li>Select the row containing the good/service you wish to procure.</li> <li>Your selection will appear in the Category field on the "Add Items and Services" screen.</li> </ul> 															
<p><b>6.</b></p>	<p>Click the  button.</p>																
<p><b>7.</b></p>	<p></p> <p>Confirm your selections in the cart.</p>	 <table border="1"> <thead> <tr> <th colspan="3">Requisition Summary</th> </tr> <tr> <th>Description</th> <th>Qty</th> <th>UOM</th> </tr> </thead> <tbody> <tr> <td>Executive Desk</td> <td>1</td> <td>EA</td> </tr> <tr> <td colspan="2">Total Lines:</td> <td>1</td> </tr> <tr> <td colspan="2">Total Amount (USD):</td> <td>1,250.00</td> </tr> </tbody> </table>	Requisition Summary			Description	Qty	UOM	Executive Desk	1	EA	Total Lines:		1	Total Amount (USD):		1,250.00
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<p><b>8.</b></p>	<p>Click the <a href="#">3. Review and Submit</a> link.</p>																
<p><b>9.</b></p>	<p>On the  <a href="#">3. Review and Submit</a> screen, confirm your Requisition Lines.</p>	<ul style="list-style-type: none"> <li>Confirm required fields for the requisition line item by clicking the  to expand the section.</li> </ul>															
<p><b>10.</b></p>	<p>Enter Ship To and Accounting Line information.</p>	<ul style="list-style-type: none"> <li>Enter your Ship To information.</li> <li>Select your PCA (SpeedChart Key) from the SpeedChart field using the magnifying glass icon.</li> </ul>															

		 <ul style="list-style-type: none"> <li><b>Note:</b> The selection of a SpeedChart will fill in your accounting codes in the <b>Chartfields2</b> tab with the exception of the “Account” (i.e. sub-object) and “Approp Yr” (i.e. fiscal year).</li> <li><b>For FY16 transactions and forward:</b> The “Account” (i.e. sub-object) will be populated for you, based on the category. <b>You cannot change the account.</b> If a change is needed, you can use the <b>Modify Line/Shipping/Accounting</b> button to change the category <b>OR, delete the line and re-enter it with the proper category.</b> The account will be changed automatically, to match the category.</li> <li>Confirm that all <b>Chartfields1</b> <b>Chartfields2</b> “Accounting Lines” information has been entered correctly.</li> </ul> 
<p><b>11.</b></p>	<p><b>OPTIONAL – To add “Attention To”.</b></p> <p>Return to the <b>1. Define Requisition</b> tab and click the “Line Defaults” arrow to enter a default value for “Attention”.</p> <p><b>NOTES:</b></p> <p><b>A.</b> Other defaults may be entered such as Ship To, Due Date, and Chartfields. <b>Note: Account Code is no longer an allowed default.</b></p> <p><b>B.</b> The defaults entered here will populate <u>ALL</u> requisition lines.</p>	
<p><b>12.</b></p>	<p>Click the <b>Continue</b> button.</p>	

<p><b>13.</b></p>	<p>Click the  button to have the defaults applied to all distribution lines.</p>	 <p>The screenshot shows the Oracle 'Distribution Change Options' screen. It has a breadcrumb trail: 'Favorites   Main Menu &gt; eProcurement &gt; Create Requisition'. The title is 'Distribution Change Options'. Below the title, it says 'For the selected requisition lines, apply distribution changes to'. There are three radio button options: 'All Distribution Lines' (selected), 'Matching Distribution Lines', and 'Replace Distribution Lines'. Each option has a brief description. At the bottom, there are 'OK' and 'Cancel' buttons, with the 'OK' button circled in red.</p>																														
<p><b>14.</b></p>	<p>On the  screen, confirm that default information has been applied to all distribution lines.</p>	 <p>The screenshot shows the Oracle 'Create Requisition' screen. It has a breadcrumb trail: 'Favorites   Main Menu &gt; eProcurement &gt; Create Requisition'. The title is 'Create Requisition'. There are three tabs: '1. Define Requisition', '2. Add Items and Services', and '3. Review and Submit' (highlighted in yellow). Below the tabs, it says 'Review the details of your requisition, make any necessary changes, and submit it for approval.' There are fields for 'Business Unit' (MDJUD), 'Requester' (ROSE.FINNEY), 'Requisition Name' (test req creation - jt), 'Currency' (USD), and 'Priority' (Medium). Below these is the 'Requisition Lines' section with a table:</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Vendor Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>test descrip</td> <td></td> <td>1.0000</td> <td>Each</td> <td>200.00000</td> <td>200.00</td> </tr> </tbody> </table> <p>Below the table are fields for 'Shipping Line' (1), 'Due Date', 'Quantity' (1.0000), and 'Price' (200.00000). There is also an 'Attention To:' field with 'Joe Sample' entered, which is circled in red. At the bottom, there is an 'Accounting Lines' section with a table:</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Status</th> <th>Dist Type</th> <th>Location</th> <th>Quantity</th> <th>Percent</th> <th>Merchandise Amt</th> <th>GL Unit</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Open</td> <td></td> <td>ACC</td> <td>1.0000</td> <td>100.0000</td> <td>200.00</td> <td>MDJUD</td> </tr> </tbody> </table> <p>At the bottom of the screen, there are buttons for 'Add to Favorites', 'Add to Template(s)', 'Modify Line / Shipping / Accounting', and 'Delete'. There is also a 'Comments' section with checkboxes for 'Send to Vendor', 'Show at Receipt', 'Shown at Voucher', and 'Approval Justification'. At the very bottom, there are buttons for 'Check Budget', 'Save &amp; submit', 'Save &amp; preview approvals', 'Cancel requisition', and 'Find more items'.</p>	Line	Description	Vendor Name	Quantity	UOM	Price	Total	1	test descrip		1.0000	Each	200.00000	200.00	Line	Status	Dist Type	Location	Quantity	Percent	Merchandise Amt	GL Unit	1	Open		ACC	1.0000	100.0000	200.00	MDJUD
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<p><b>15.</b></p>	<p><b>Enter Line Comments/Attachments</b></p>	<ul style="list-style-type: none"> <li>To add comments or attachments about line items, select the  icon at the far right of the line.</li> <li>Enter comments into the text box and/or click the  button to add an attachment.</li> </ul>  <p><b>NOTE:</b> Ensure that the check box for <b>Send to Vendor</b> in the attachments list has a check mark in it. This allows Procurement to view the attachment.</p> <ul style="list-style-type: none"> <li>Click the OK button.</li> </ul>
<p><b>16.</b></p>	<p>Save the Requisition by clicking the  button.</p>	
<p><b>17.</b></p>	<p>Check budget for available funds by clicking the  button.</p>	
<p><b>18.</b></p>	<p>Submit the Requisition for approval by clicking the  button.</p>	

 **Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.