MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

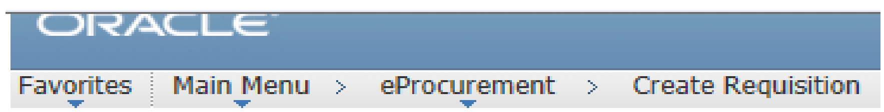
Quick Reference Tip Sheet

LAST REVISED DATE: 03/01/2016

General Information

Task	**Process Information**
Creating an eProcurement Requisition	A requisition is created in the eProcurement module for goods/services. **NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:** 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.

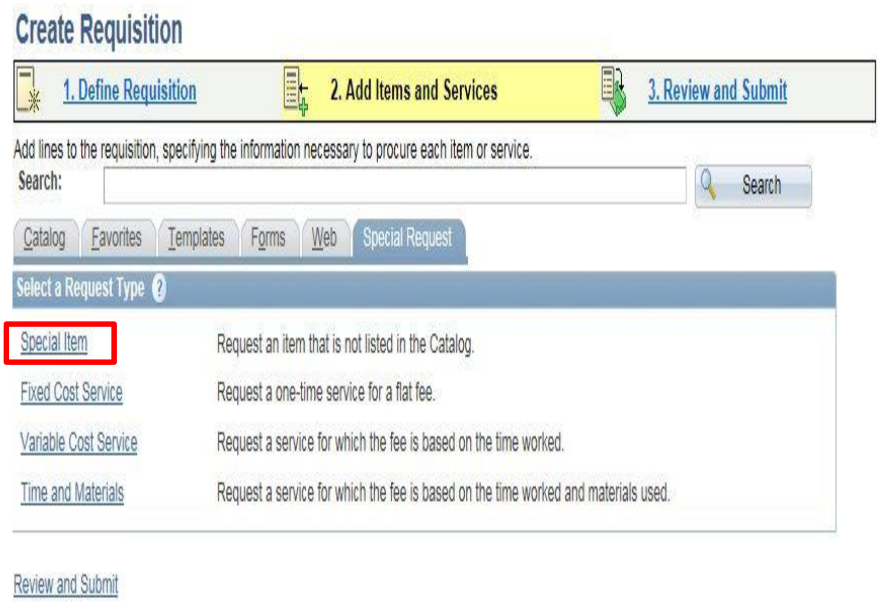
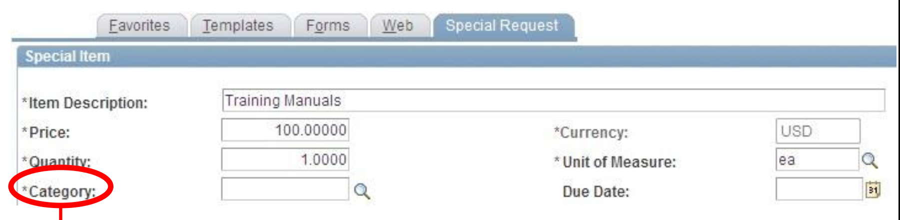
GEARS Navigation

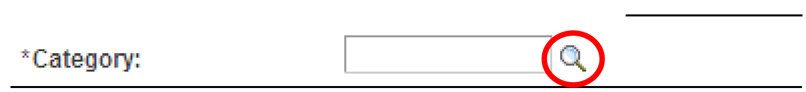
eProcurement > Create Requisition	

1.0 Process

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

STEP	**ACTION**	**DETAILS**
1.	**On the** 1. Define Requisition **screen, define your requisition by giving it a name.**	<u>NOTE</u>: 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, *AY15 Sharp Maint Renew*. Requisition Name:
2.	**Click the** Continue **button.**	

<table>
<tr>
<td>3.</td>
<td>On the 2. Add Items and Services screen, click the Special Item link.</td>
<td>
</td>
</tr>
<tr>
<td>4.</td>
<td>Add items and services.</td>
<td>Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure). NOTE: See below for Category.




You can search for the Category by selecting the magnifying glass .</td>
</tr>
<tr>
<td>5.</td>
<td>On the Create Requisition Look Up Category screen.</td>
<td>Choose either Search Categories or Browse Category Tree to look up the appropriate category for your requisition.</td>
</tr>
</table>

5a.

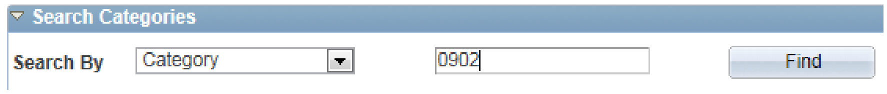
NOTE: Do either 5a or 5b.

To 

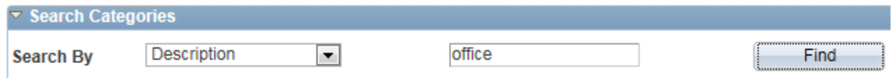
For FY16 transactions and forward:
The **MDJUD Item Catalog** and the associated categories used on Requisitions, Express POs and POs is being replaced with a new catalog **MDJUD Item Catalog NEW**. The category codes contained in this new catalog are the same as our existing account codes. This enhancement 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.

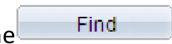
For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.

- 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.

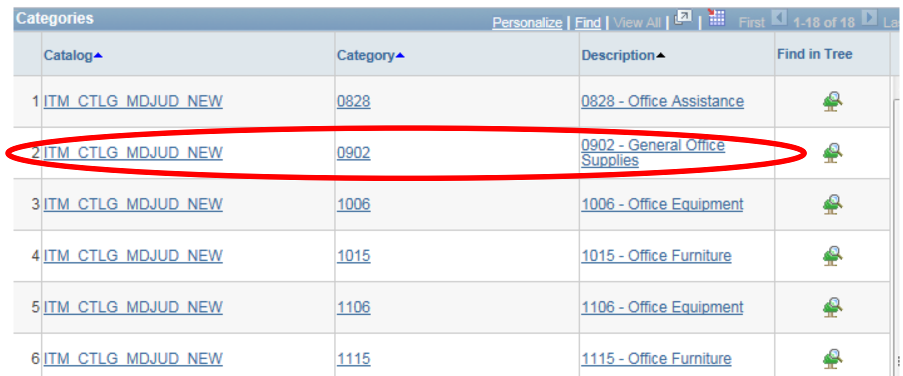


- OR -

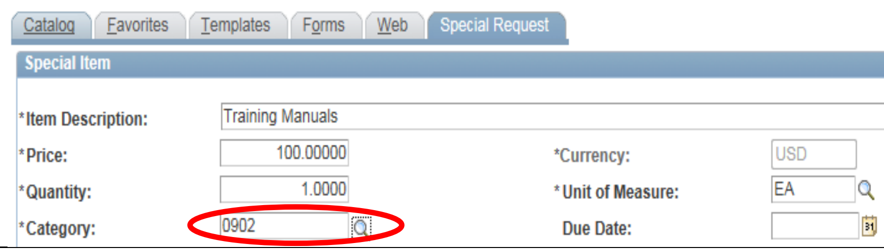


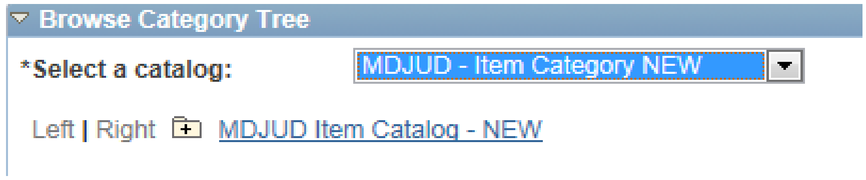
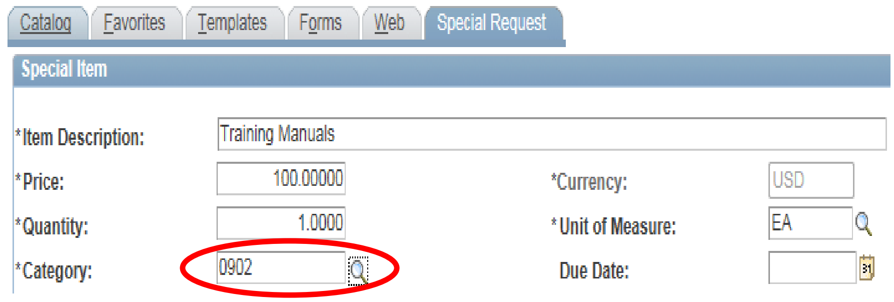
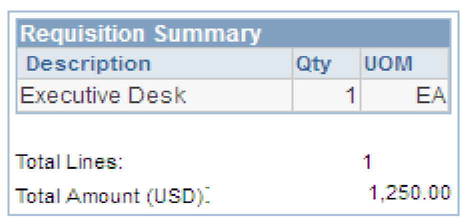
- Click the  button to return a list of results based on your entry.

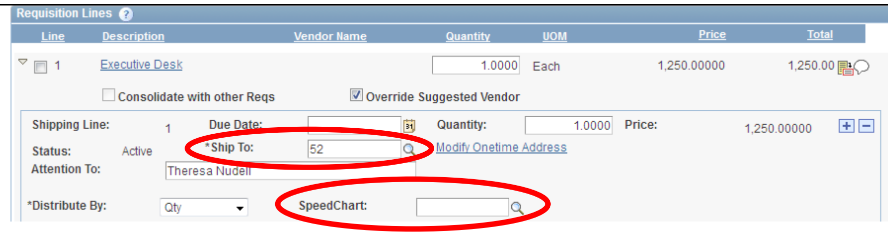
- Select the row containing the good/service you wish to procure.



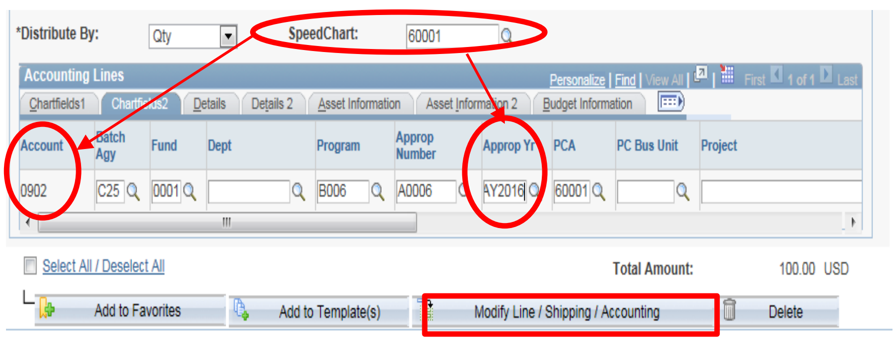
- Your selection will appear in the Category field on the "Add Items and Services" screen.



5b.	**NOTE: Do either 5a or 5b.** To Browse Category Tree __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. <u>If you know the appropriate account code for your purchase, the category code will be the same.</u> For example, if the account code to be used on your requisition line is 0902 (Office Supplies), you would choose 0902 as the category.	• Expand the section by clicking the ▷. • Select a catalog from the dropdown list and click the ⊞ to browse the categories within.  • Select the row containing the good/service you wish to procure. • Your selection will appear in the Category field on the “Add Items and Services” screen. 
6.	**Click the** Add Item **button.**	
7.	**Confirm your selections in the cart.**	
8.	**Click the** 3. Review and Submit **link.**	
9.	**On the** **3. Review and Submit** **screen, confirm your Requisition Lines.**	• Confirm required fields for the requisition line item by clicking the ▷ to expand the section.
10.	**Enter Ship To and Accounting Line information.**	• Enter your Ship To information. • Select your PCA (SpeedChart Key) from the SpeedChart field using the magnifying glass icon.



- **Note**: The selection of a SpeedChart will fill in your accounting codes in the Chartfields2 tab with the exception of the "Account" (i.e. sub-object) and "Approp Yr" (i.e. fiscal year).
- **For FY16 transactions and forward:** The "Account" (i.e. sub-object) will be populated for you, based on the category. You cannot change the account. If a change is needed, you can use the Modify Line/Shipping/Accounting button to change the category OR, delete the line and re-enter it with the proper category. The account will be changed automatically, to match the category.
- Confirm that all Chartfields1 Chartfields2 "Accounting Lines" information has been entered correctly.



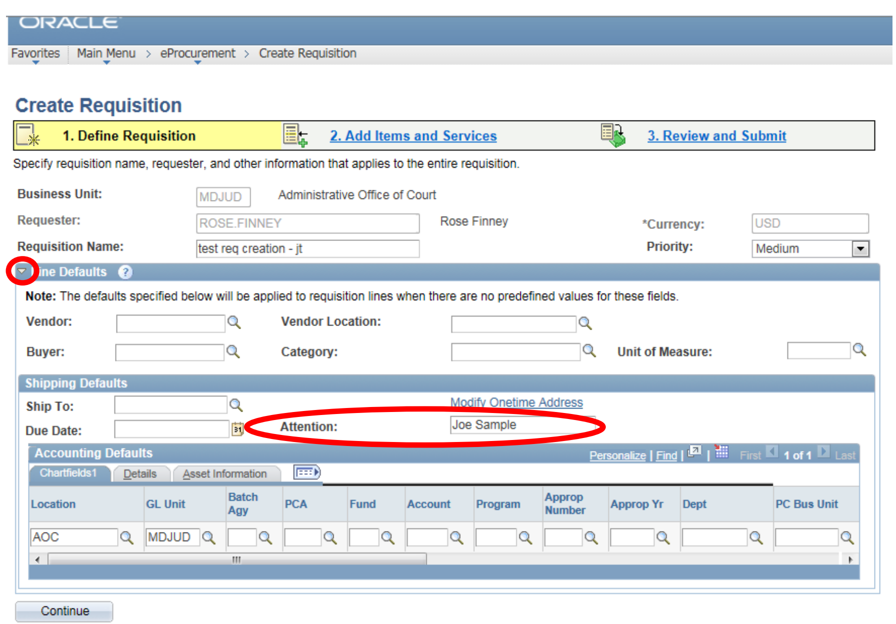
11. **OPTIONAL – To add "Attention To".**

Return to the 1. Define Requisition tab and click the "Line Defaults" arrow to enter a default value for "Attention".

NOTES:

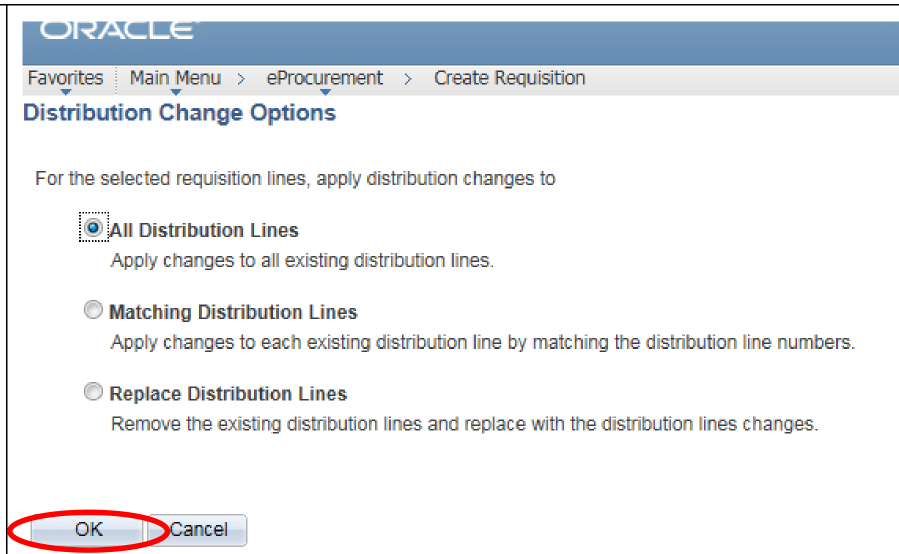
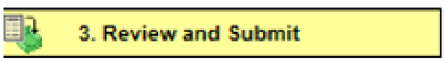
A. **Other defaults may be entered such as Ship To, Due Date, and Chartfields. Note: Account Code is no longer an allowed default.**

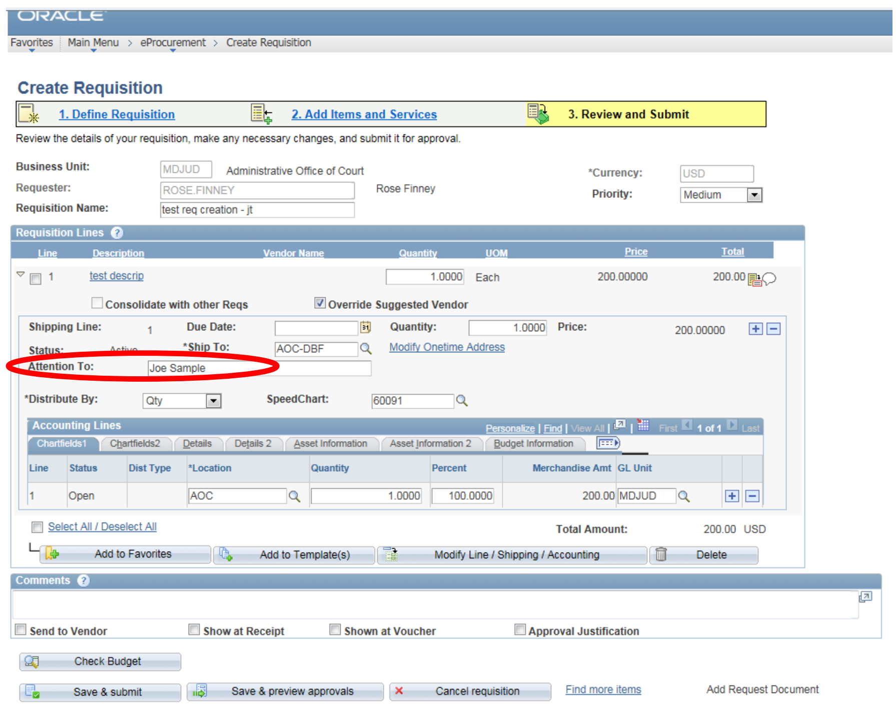
B. **The defaults entered here will populate ALL requisition lines.**

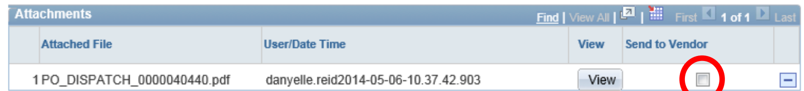


12. **Click the Continue button.**

<table>
<tr>
<td>13.</td>
<td>Click the 

button to have the defaults applied to all distribution lines.</td>
<td>
</td>
</tr>
<tr>
<td>14.</td>
<td>On the 

screen, confirm that default information has been applied to all distribution lines.</td>
<td>
</td>
</tr>
</table>

15.	**Enter Line Comments/Attachments**	• To add comments or attchments about line items, select the icon at the far right of the line. • Enter comments into the text box and/or click the Add Attachment button to add an attachment.  **NOTE:** Ensure that the check box for **Send to Vendor** in the attachments list has a check mark in it. This allows Procurement to view the attachment. • Click the OK button.
16.	**Save the Requisition by clicking the Save & preview approvals button.**	
17.	**Check budget for available funds by clicking the Check Budget button.**	
18.	**Submit the Requisition for approval by clicking the Submit button.**	

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.