MARYLAND JUDICIARY

GEARS General Enterprise And Resource Support

Quick Reference Tip Sheet

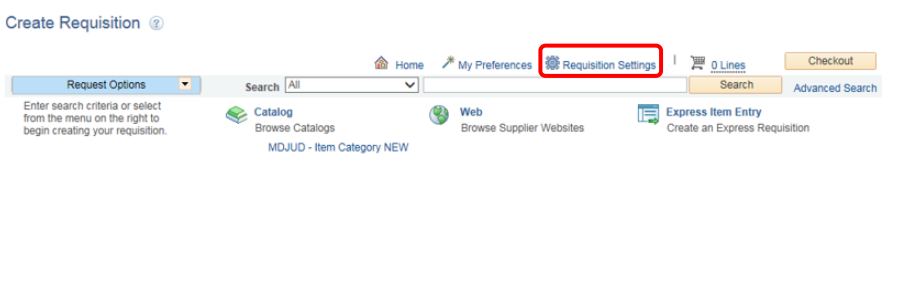## General Information

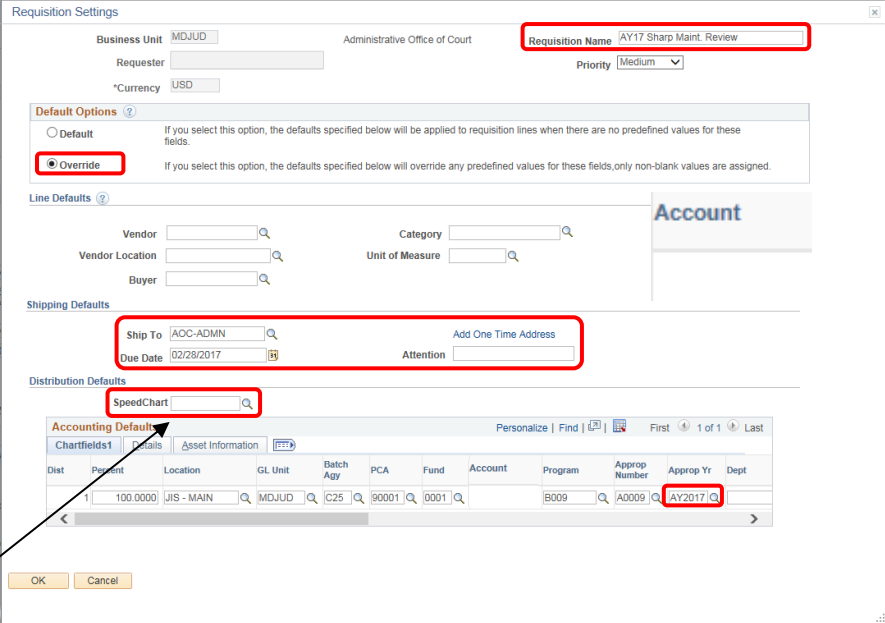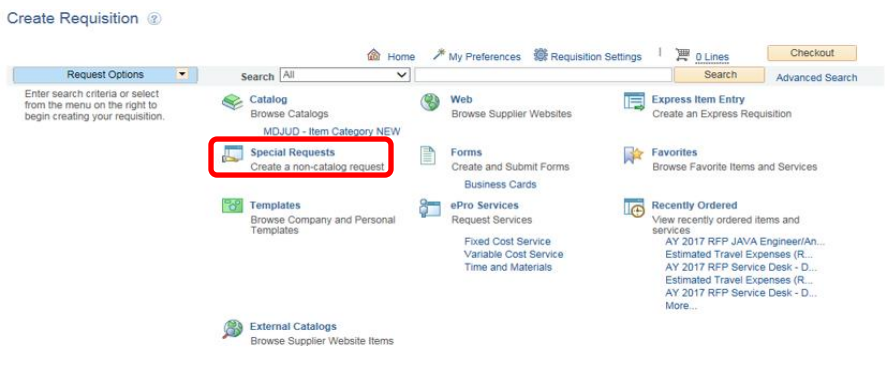| Task	Process Information
Creating an eProcurement Requisition	A requisition is created in the eProcurement module for procuring goods/services. **NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs:** Per the FY17 Procurement Policy Change, Receipts will no longer be REQUIRED for Services 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

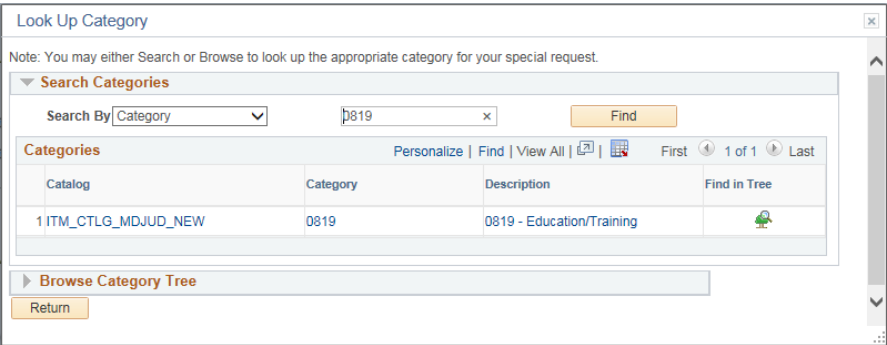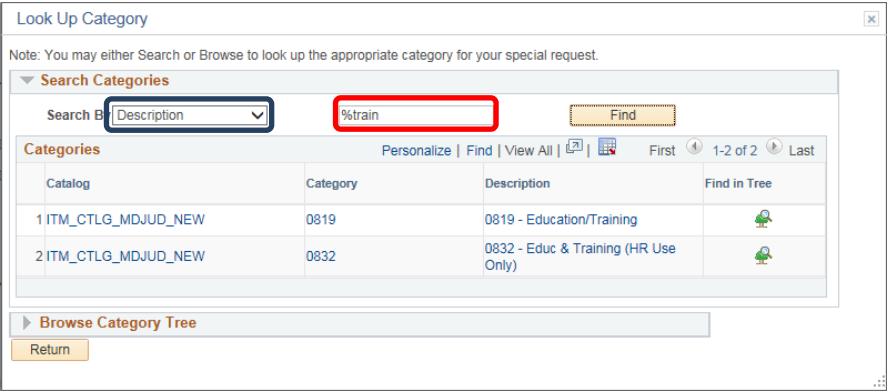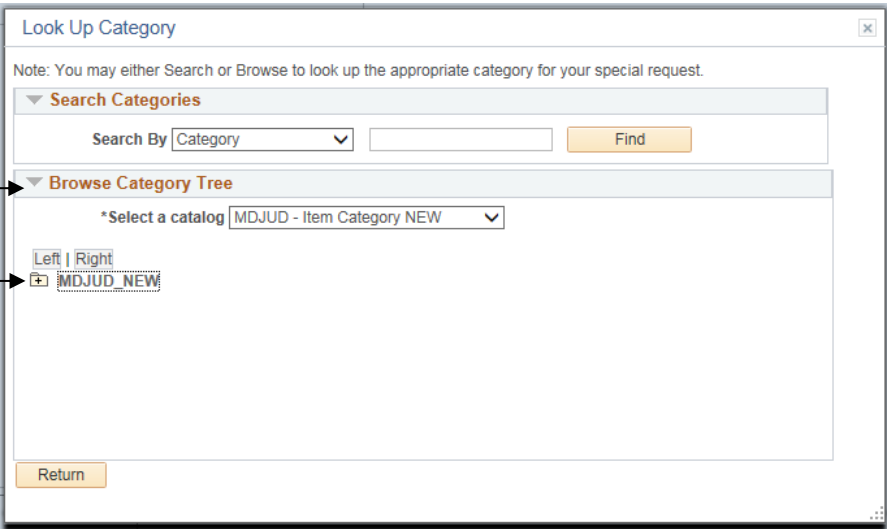|	
Main Menu > eProcurement > Requisition	Favorites ▼ Main Menu ▼ > eProcurement ▼ > Requisition

1.0   Process

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

STEP	ACTION	DETAILS
1.	**Click on the link Requisition Settings. This is where you'll setup the defaults for your Requisition.**	Create Requisition ⓘ 🏠 Home ✎ My Preferences ⚙ Requisition Settings 🛒 0 Lines Checkout Request Options ▾ Search All ▾ Search Advanced Search Enter search criteria or select from the menu on the right to begin creating your requisition. 📗 Catalog / Browse Catalogs 🌐 Web / Browse Supplier Websites 📋 Express Item Entry / Create an Express Requisition MDJUD - Item Category NEW

2.	On the pop-up window that opens, enter your **Requisition name**. <u>**NOTES**</u>: 1. 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, AY17 Adobe Products. **Requisition Name:** ☐ 2. Click on the **Override** radio button. The defaults entered on steps 3 & 4 will populate on <u>ALL</u> your requisition lines. 3. Enter the **Ship To, Due Date** and **Attention** fields, if needed. 4. To use the **SpeedChart** field, you can search for your PCA by using the 🔍 feature. Notice that the **Account** and **Approp Yr** Chartfields are blank. Enter the **Approp Yr** and leave the **Account** blank.	 **Multiple PCA's per line:** If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.
3.	Click the [OK] button.	
4.	**Click on the link Special Requests.**	
5.	**Add items and/or services.** Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure). <u>**Note**</u>: You can search for the Category by selecting the magnifying glass.	

6.	**On the Look Up Category screen.** Choose either ▼ Search Categories or ▶ Browse Category Tree to look up the appropriate category for your requisition. **NOTE: Do either 6a or 6b.**	You can look up Category by **Account #** Look Up Category Note: You may either Search or Browse to look up the appropriate category for your special request. ▼ Search Categories Search By Category ▼ 0819 ✕ Find Categories Personalize | Find | View All | 🖉 | 🖩 First ① 1 of 1 ① Last Catalog	Category	Description	Find in Tree 1 ITM_CTLG_MDJUD_NEW	0819	0819 - Education/Training	🌳 ▶ Browse Category Tree Return
6a.	**To** ▼ Search Categories **Note:** The category Codes are the same as our existing account codes. *If you know the appropriate account code for your purchase, you can enter it, as the category code will be the same.*	You can also look up Categories by **Description** *(be sure to change the Search By value to 'Description').* The **%** before the search keyword will look for the search keyword anywhere within the **Description**. In this case, the system searches for the word **train** in all the category descriptions. Look Up Category Note: You may either Search or Browse to look up the appropriate category for your special request. ▼ Search Categories Search By Description ▼ %train Find Categories Personalize | Find | View All | 🖉 | 🖩 First ① 1-2 of 2 ① Last Catalog	Category	Description	Find in Tree 1 ITM_CTLG_MDJUD_NEW	0819	0819 - Education/Training	🌳 2 ITM_CTLG_MDJUD_NEW	0832	0832 - Educ & Training (HR Use Only)	🌳 ▶ Browse Category Tree Return
6b.	**To** ▶ Browse Category Tree • Expand the section by clicking the ▶ • Select a catalog from the dropdown list and click the ⊞ to browse the categories within. For example, if the account code to be used on your requisition line is 0819 (Education/Training), you would choose 0819 as the category.	Look Up Category Note: You may either Search or Browse to look up the appropriate category for your special request. ▼ Search Categories Search By Category ▼ Find ▼ Browse Category Tree *Select a catalog MDJUD - Item Category NEW ▼ Left | Right ⊞ MDJUD_NEW Return

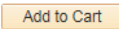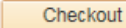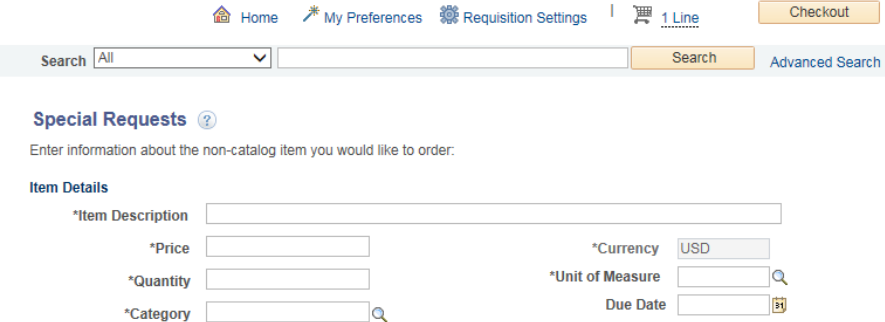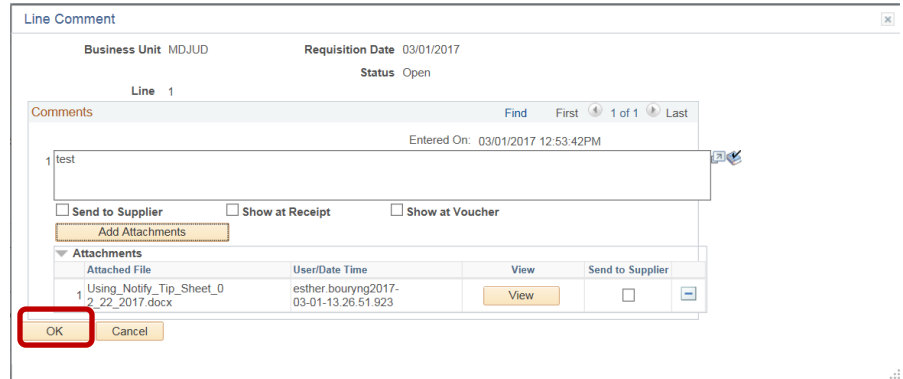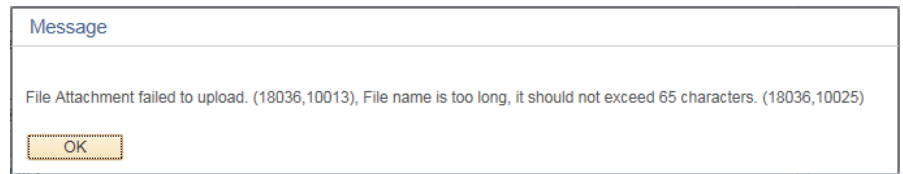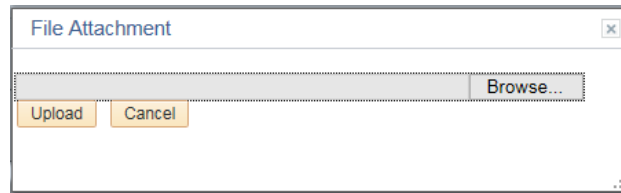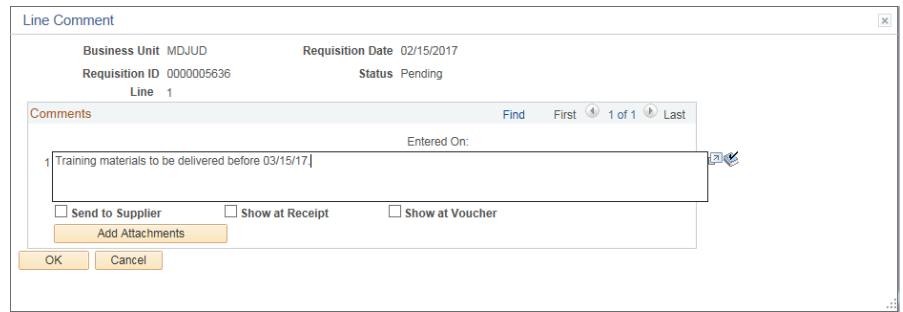|		
	• Select the row containing the good/service you wish to procure. • Your selection will appear in the Category field on the "Add Items and Services" screen.	📁 0815 - Laundry 📁 0817 - Legal Services 📁 0819 - Education/Training 📁 0820 - Medical Care 📁 0821 - Management Studies & Co **Item Details** *Item Description Training Materials *Price 100 *Currency USD *Quantity 100 *Unit of Measure EA *Category 0819 Due Date
7.	Click the Add to Cart button.	
8.	If you're requesting multiple items, you can continue adding **Items** to your cart. When you are done adding **Items**, click on the Checkout button.	🏠 Home 🖋 My Preferences ⚙ Requisition Settings 🛒 1 Line Checkout Search All Search Advanced Search **Special Requests** ❓ Enter information about the non-catalog item you would like to order: **Item Details** *Item Description *Price *Currency USD *Quantity *Unit of Measure *Category Due Date
9.	Checkout - Review and Submit Review the item information and submit the req for approval. 🖋 My Preferences ⚙ Requisition Settings **Requisition Summary** Business Unit MDJUD Administrative Office of Court Requisition Name AY17 Sharp Maint. Review Requester COLLEEN.CANTLER Colleen Cantler Priority Medium *Currency USD **Cart Summary: Total Amount 10,000.00 USD** Expand lines to review shipping and accounting details ➕ Add More Items **Requisition Lines** ❓ | Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete
---	---	---	---	---	---	---	---	---	---	---
▶ ☐ 1	Training Materials			100.0000	Each	100.0000	10000.00	📄	Add	🗑 | ☐ Select All / Deselect All Select lines to: 📁 Add to Favorites 📋 Add to Template(s) 🗑 Delete Selected 📝 Mass Change Total Amount 10,000.00 USD To add comments or attchments about line items, select the 💬 icon at the far right of the line.	
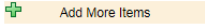
10.	You can add comments in the comments section and click on the [Add Attachments] button to add attachments.	**Line Comment** [×] Business Unit MDJUD Requisition Date 02/15/2017 Requisition ID 0000005636 Status Pending Line 1 **Comments** Find First 1 of 1 Last Entered On: 1 Training materials to be delivered before 03/15/17 ☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher [Add Attachments] [OK] [Cancel]
	Navigate to the location of your file by clicking **Browse**, select your file and then click the **Upload** button.	**File Attachment** [×] [Browse...] [Upload] [Cancel]
	Note: Please ensure that the file name does not exceed 65 characters as it will fail.	**Message** File Attachment failed to upload. (18036,10013), File name is too long, it should not exceed 65 characters. (18036,10025) [OK]
	After the attachment has been successfully uploaded, click the [OK] button.	**Line Comment** [×] Business Unit MDJUD Requisition Date 03/01/2017 Status Open Line 1 **Comments** Find First 1 of 1 Last Entered On: 03/01/2017 12:53:42PM 1 test ☐ Send to Supplier ☐ Show at Receipt ☐ Show at Voucher [Add Attachments] ▼ **Attachments** Attached File User/Date Time View Send to Supplier 1 Using_Notify_Tip_Sheet_0 2_22_2017.docx esther.bouryng2017- 03-01-13.26.51.923 [View] ☐ [−] [OK] [Cancel]
11.		
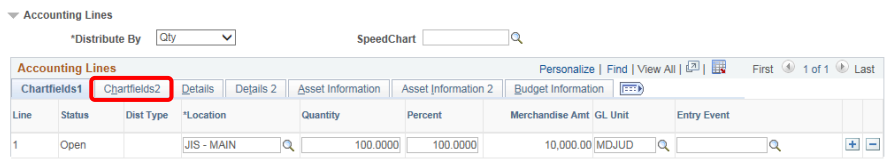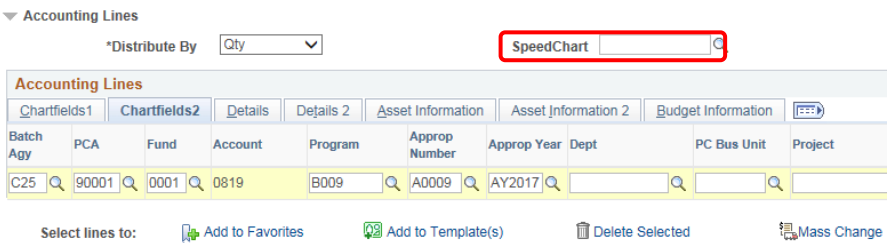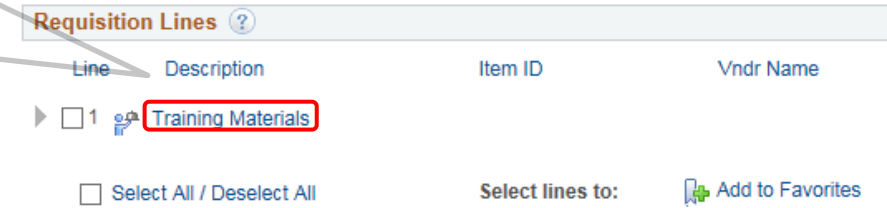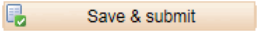
Line Description Item ID Vndr Name Quantity UOM Price Total Details Comments Delete
▼ ☐ 1 Training Materials 100.0000 Each 100.000 10000.00 Add 🗑
Shipping Line 1 *Ship To AOC-ADMN Quantity 100.0000 [+][−]
Address 580 TAYLOR AVENUE ANNAPOLIS, MD 21401 Add One Time Address Price 100.0000 Price Adjustment
Attention To Colleen Cantler Pegging Inquiry
Due Date 02/28/2017 Pegging Workbench
► Accounting Lines
☐ Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change
Total Amount 10,000.00 USD

Click on the ▶ icon near **Line.** Then click on the ▶ icon to the left of **Accounting Lines.**

12.	Click on the tab **Chartfields 2** to view your chartfields.	
13.	If you need to change the PCA on the Req. line, you can do that by entering the PCA in the **SpeedChart** field. If you change the PCA, you'll have to re-enter the **Approp Yr**.	The Account field is populated based on the category you've chosen. You cannot change the account # on this panel. If you need to change the account, you can click on the line description (seen below) and then change the category, which will then default in a new Account value based on the newly selected Category.
14.	**Click the** [Save & submit] **button at the bottom of the page.**	

15.	On the Confirmation page, you'll see your Requisition number. Budget Check your **Req.** by clicking on the link **Check Budget** . You'll see a processing graphic on the top right side of your screen.	**Confirmation** Your requisition has been submitted. Requested For Colleen Cantler Requisition Name AY17 Sharp Maint. Review Requisition ID 0000005636 Business Unit MDJUD Status Pending Priority Medium Budget Status Not Checked Number of Lines 1 Total Amount 10,000.00 USD View printable version Edit This Requisition Check Budget **JIS Approvals** AY17 Sharp Maint. Review:Pending JIS Approvals Pending — Multiple Approvers JIS Level 1 Approver Not Routed — Multiple Approvers JIS Level 2 Approver Not Routed — Multiple Approvers Dept of Budget Approver Apply Approval Changes Create New Requisition Manage Requisitions
16.	Once the **Budget Check** completes, verify that your Budget Status is **Valid**. Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when: 1. **Your Requisition has been Approved.** 2. **The PO associated with your Req. is Dispatched to the Vendor.**	**Confirmation** Your requisition has been submitted. Requested For Colleen Cantler Requisition Name AY17 Sharp Maint. Review Requisition ID 0000005636 Business Unit MDJUD Status Pending Priority Medium Budget Status Valid Number of Lines 1 Total Amount 10,000.00 USD Pre-Encumbrance Balance 10000.00 USD View printable version Edit This Requisition **JIS Approvals** AY17 Sharp Maint. Review:Pending JIS Approvals Pending — Multiple Approvers JIS Level 1 Approver Not Routed — Multiple Approvers JIS Level 2 Approver Not Routed — Multiple Approvers Dept of Budget Approver Apply Approval Changes Create New Requisition Manage Requisitions

End of Document

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