

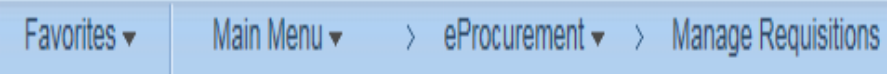
Quick Reference Tip Sheet

NEW: 05/01/2017

General Information


Task	Process Information
<p>Creating a Requisition Template (for Recurring Requisitions)</p> <p>Note: If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>NOTE: As a prerequisite, please see the tip sheet for “Creating an eProcurement Requisition”.</p> <p>Once created, an ePro Requisition and the associated line items can be saved as a template for recurring use. NOTE: Templates are unique/personal to a Requester.</p> <p>Use of a Template is the preferred method for recurring orders. The Copy Requisition method is an alternative, though <u>not</u> recommended because unwanted information may unintentionally be included. For example, you would not want the old Buyer Name to be carried forward on the new requisition, as this could delay/prevent sourcing to a purchase order. The Template method will default the Buyer to “Field_Buyer” (or blank), so your new requisition can be assigned to a Procurement Buyer and then sourced to a purchase order.</p>


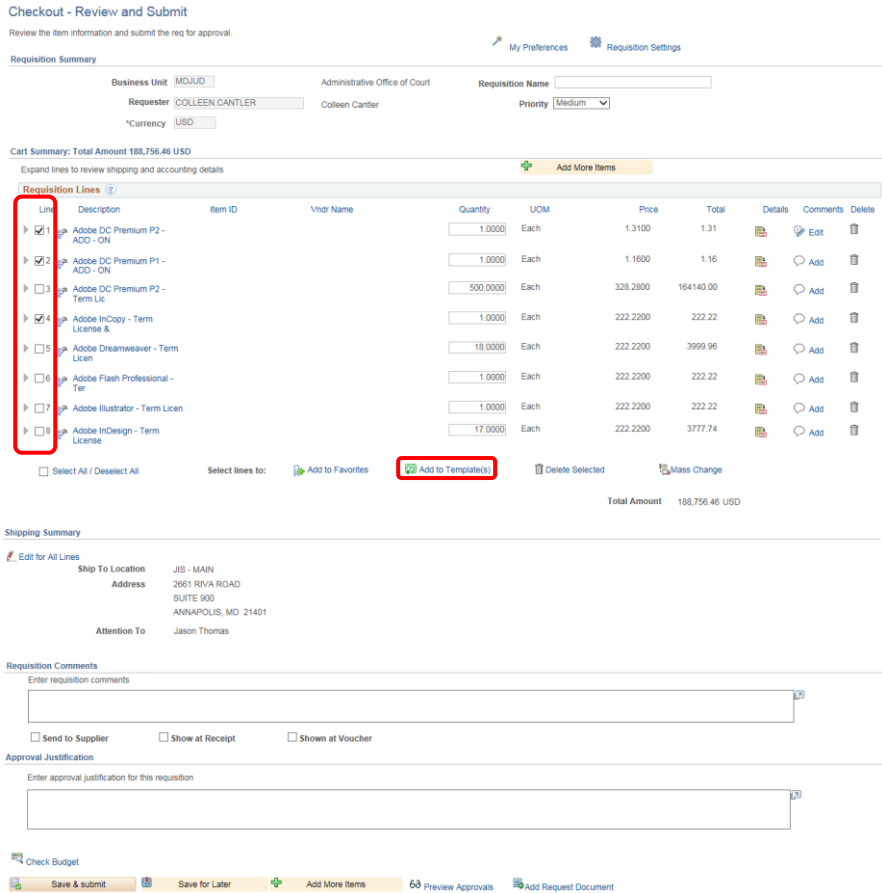
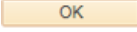
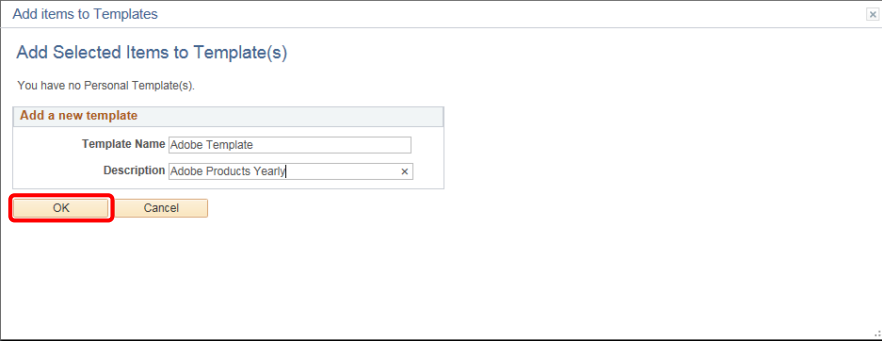
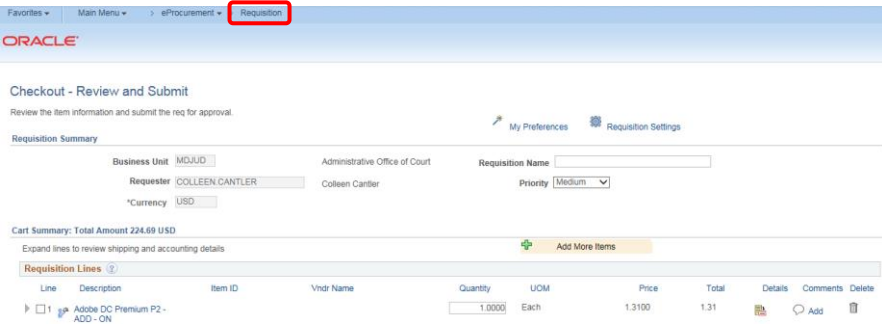
GEARS Navigation

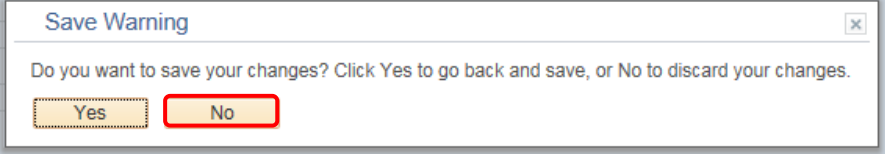

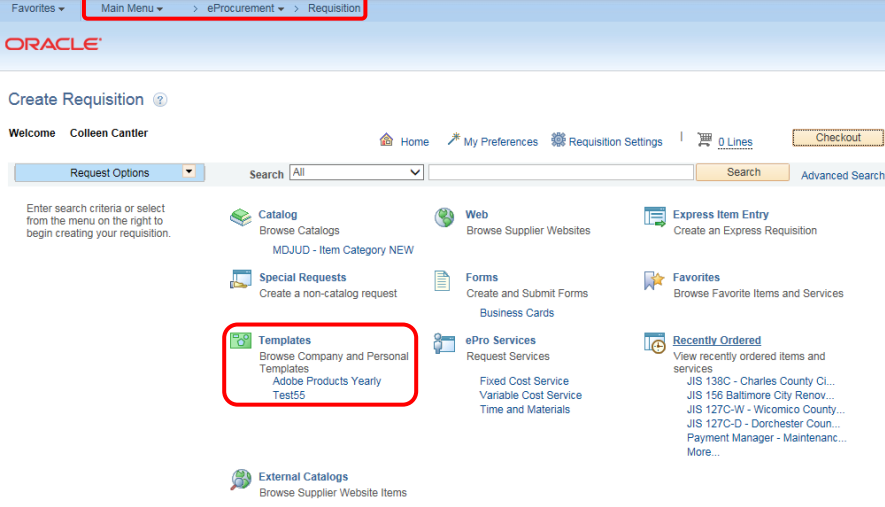
eProcurement > Manage Requisitions	
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1.0 Process

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

STEP	ACTION	DETAILS																																																																																																			
1.	<p>a. Find the requisition to be used as the source. (NOTE: Use the fields in the Search Requisitions section to narrow your search results).</p> <p>b. Choose "Copy Requisition" from the dropdown.</p> <p>c. Click the  button.</p>	<p>Manage Requisitions</p> <p>Search Requisitions</p> <p>To locate requisitions, edit the criteria below and click the Search button.</p> <p>Business Unit MDJUD Requisition Name Requisition ID 000004913 Request State All but Complete Budget Status Date From Date To 02/16/2017 Entered By PO ID Requester COLLEEN CANTLER</p> <p>Search Clear Show Advanced Search</p> <p>Requisitions</p> <p>To view the lifespan and line items for a requisition, click the Expand triangle icon. To edit or perform another action on a requisition, make a selection from the Action dropdown list and click Go.</p> <table border="1"> <thead> <tr> <th>Req ID</th> <th>Requisition Name</th> <th>BU</th> <th>Date</th> <th>Request State</th> <th>Budget</th> <th>Total</th> <th></th> </tr> </thead> <tbody> <tr> <td>000004913</td> <td>AY16 Adobe ETLA Renewal</td> <td>MDJUD</td> <td>05/26/2016</td> <td>PO(s) Completed</td> <td>Valid</td> <td>188,756.46 USD</td> <td>Copy Go</td> </tr> </tbody> </table> <p>Requester Colleen Cantler Entered By Colleen Cantler Priority Medium Pre-Encumbrance Balance 0.00 USD</p> <p>Requisition Approvals Inventory Purchase Orders Change Request Receiving Returns Invoice Payment</p> <p>Request Lifespan: Line Information Personalize Find First 1-18 of 18 Last</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Status</th> <th>Price</th> <th>Quantity</th> <th>UOM</th> <th>Vndr Name</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Adobe DC Premium P2 - ADD - ...</td> <td>PO Completed</td> <td>1,31000</td> <td>USD</td> <td>1,0000 EA</td> <td></td> <td>X</td> </tr> <tr> <td>2</td> <td>Adobe DC Premium P1 - ADD - ...</td> <td>PO Completed</td> <td>1,16000</td> <td>USD</td> <td>1,0000 EA</td> <td></td> <td>X</td> </tr> </tbody> </table>	Req ID	Requisition Name	BU	Date	Request State	Budget	Total		000004913	AY16 Adobe ETLA Renewal	MDJUD	05/26/2016	PO(s) Completed	Valid	188,756.46 USD	Copy Go	Line	Description	Status	Price	Quantity	UOM	Vndr Name		1	Adobe DC Premium P2 - ADD - ...	PO Completed	1,31000	USD	1,0000 EA		X	2	Adobe DC Premium P1 - ADD - ...	PO Completed	1,16000	USD	1,0000 EA		X																																																											
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2.	<p>The requisition will be copied, and the Create Requisition page will open.</p>	<p>Checkout - Review and Submit</p> <p>Review the item information and submit the req for approval. My Preferences Requisition Settings</p> <p>Requisition Summary</p> <p>Business Unit MDJUD Administrative Office of Court Requisition Name Requester COLLEEN CANTLER Colleen Cantler Priority Medium *Currency USD</p> <p>Cart Summary: Total Amount 188,756.46 USD</p> <p>Expand lines to review shipping and accounting details Add More Items</p> <p>Requisition Lines</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Item ID</th> <th>Vndr Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> <th>Details</th> <th>Comments</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Adobe DC Premium P2 - ADD - ON</td> <td></td> <td></td> <td>1,0000</td> <td>Each</td> <td>1,3100</td> <td>1,31</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>Adobe DC Premium P1 - ADD - ON</td> <td></td> <td></td> <td>1,0000</td> <td>Each</td> <td>1,1600</td> <td>1,16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>Adobe DC Premium P2 - Term Lic</td> <td></td> <td></td> <td>500,0000</td> <td>Each</td> <td>328,2000</td> <td>164140,00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>4</td> <td>Adobe InCopy - Term License &</td> <td></td> <td></td> <td>1,0000</td> <td>Each</td> <td>222,2200</td> <td>222,22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>5</td> <td>Adobe Dreamweaver - Term Licen</td> <td></td> <td></td> <td>18,0000</td> <td>Each</td> <td>222,2200</td> <td>3999,96</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6</td> <td>Adobe Flash Professional - Ter</td> <td></td> <td></td> <td>1,0000</td> <td>Each</td> <td>222,2200</td> <td>222,22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>7</td> <td>Adobe Illustrator - Term Licen</td> <td></td> <td></td> <td>1,0000</td> <td>Each</td> <td>222,2200</td> <td>222,22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>Adobe InDesign - Term</td> <td></td> <td></td> <td>17,0000</td> <td>Each</td> <td>222,2200</td> <td>3777,74</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Select All / Deselect All Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change Total Amount 188,756.46 USD</p> <p>Shipping Summary</p> <p>Edit for All Lines</p> <p>Ship To Location JIS - MAIN Address 2661 RIVA ROAD SUITE 900 ANNAPOLIS, MD 21401 Attention To Jason Thomas</p> <p>Requisition Comments</p> <p>Enter requisition comments</p> <p>Send to Supplier Show at Receipt Shown at Voucher</p> <p>Approval Justification</p> <p>Enter approval justification for this requisition</p> <p>Check Budget</p> <p>Save & submit Save for Later Add More Items Preview Approvals Add Request Document</p>	Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete	1	Adobe DC Premium P2 - ADD - ON			1,0000	Each	1,3100	1,31				2	Adobe DC Premium P1 - ADD - ON			1,0000	Each	1,1600	1,16				3	Adobe DC Premium P2 - Term Lic			500,0000	Each	328,2000	164140,00				4	Adobe InCopy - Term License &			1,0000	Each	222,2200	222,22				5	Adobe Dreamweaver - Term Licen			18,0000	Each	222,2200	3999,96				6	Adobe Flash Professional - Ter			1,0000	Each	222,2200	222,22				7	Adobe Illustrator - Term Licen			1,0000	Each	222,2200	222,22				8	Adobe InDesign - Term			17,0000	Each	222,2200	3777,74			
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<p>3.</p> <p>a. Choose the lines to be saved on the template.</p> <p>b. Then click on the link</p> <p> Add to Template(s)</p> <p>Information carried over for each requisition line includes: Description, Vendor, Quantity, UOM, Price, Location, and Account.</p> <p>NOTE: Account is the only chartfield stored on the template.</p>	 <p>Checkout - Review and Submit</p> <p>Review the item information and submit the req for approval.</p> <p>My Preferences Requisition Settings</p> <p>Requisition Summary</p> <p>Business Unit MDJUD Administrative Office of Court Requisition Name</p> <p>Requester COLLEEN CANTLER Colleen Cantler Priority Medium</p> <p>*Currency USD</p> <p>Cart Summary: Total Amount 188,756.46 USD</p> <p>Expand lines to review shipping and accounting details Add More Items</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Item ID</th> <th>Vndr Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> <th>Details</th> <th>Comments</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Adobe DC Premium P2 - ADD - ON</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>1.3100</td> <td>1.31</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2</td> <td>Adobe DC Premium P1 - ADD - ON</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>1.1600</td> <td>1.16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>3</td> <td>Adobe DC Premium P2 - Term Lic</td> <td></td> <td></td> <td>500.0000</td> <td>Each</td> <td>328.2800</td> <td>164140.00</td> <td></td> <td></td> <td></td> </tr> <tr> <td>4</td> <td>Adobe InCopy - Term License &</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>222.2200</td> <td>222.22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>5</td> <td>Adobe Dreamweaver - Term Licen</td> <td></td> <td></td> <td>18.0000</td> <td>Each</td> <td>222.2200</td> <td>3999.96</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6</td> <td>Adobe Flash Professional - Ter</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>222.2200</td> <td>222.22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>7</td> <td>Adobe Illustrator - Term Licen</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>222.2200</td> <td>222.22</td> <td></td> <td></td> <td></td> </tr> <tr> <td>8</td> <td>Adobe InDesign - Term License</td> <td></td> <td></td> <td>17.0000</td> <td>Each</td> <td>222.2200</td> <td>3777.74</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Select lines to: Add to Favorites Add to Template(s) Delete Selected Mass Change</p> <p>Total Amount 188,756.46 USD</p> <p>Shipping Summary</p> <p>Edit for All Lines</p> <p>Ship To Location JIS - MAIN</p> <p>Address 2661 RIVA ROAD SUITE 900 ANNAPOLIS, MD 21401</p> <p>Attention To Jason Thomas</p> <p>Requisition Comments</p> <p>Enter requisition comments</p> <p>Send to Supplier Show at Receipt Shown at Voucher</p> <p>Approval Justification</p> <p>Enter approval justification for this requisition</p> <p>Check Budget</p> <p>Save & submit Save for Later Add More Items Preview Approvals Add Request Document</p>	Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete	1	Adobe DC Premium P2 - ADD - ON			1.0000	Each	1.3100	1.31				2	Adobe DC Premium P1 - ADD - ON			1.0000	Each	1.1600	1.16				3	Adobe DC Premium P2 - Term Lic			500.0000	Each	328.2800	164140.00				4	Adobe InCopy - Term License &			1.0000	Each	222.2200	222.22				5	Adobe Dreamweaver - Term Licen			18.0000	Each	222.2200	3999.96				6	Adobe Flash Professional - Ter			1.0000	Each	222.2200	222.22				7	Adobe Illustrator - Term Licen			1.0000	Each	222.2200	222.22				8	Adobe InDesign - Term License			17.0000	Each	222.2200	3777.74			
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<p>4.</p> <p>Enter a Template Name and Description, and then click the</p> <p> button to save the template.</p> <p>NOTE: Make the Name and Description meaningful, so you can easily identify the template later.</p>	 <p>Add items to Templates</p> <p>Add Selected Items to Template(s)</p> <p>You have no Personal Template(s).</p> <p>Add a new template</p> <p>Template Name Adobe Template</p> <p>Description Adobe Products Yearly</p> <p>OK Cancel</p>																																																																																																			
<p>5.</p> <p>You can cancel this requisition by clicking on Requisition on your menu.</p> <p>NOTE: This action cancels the Requisition, but not the Requisition Template.</p>	 <p>Favorites Main Menu eProcurement Requisition</p> <p>ORACLE</p> <p>Checkout - Review and Submit</p> <p>Review the item information and submit the req for approval.</p> <p>My Preferences Requisition Settings</p> <p>Requisition Summary</p> <p>Business Unit MDJUD Administrative Office of Court Requisition Name</p> <p>Requester COLLEEN CANTLER Colleen Cantler Priority Medium</p> <p>*Currency USD</p> <p>Cart Summary: Total Amount 224.69 USD</p> <p>Expand lines to review shipping and accounting details Add More Items</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Item ID</th> <th>Vndr Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> <th>Details</th> <th>Comments</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Adobe DC Premium P2 - ADD - ON</td> <td></td> <td></td> <td>1.0000</td> <td>Each</td> <td>1.3100</td> <td>1.31</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete	1	Adobe DC Premium P2 - ADD - ON			1.0000	Each	1.3100	1.31																																																																																
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<p>6. When you receive the Save message, click the No button.</p> <p>NOTE: This action cancels the Requisition, but not the Requisition Template.</p> <p>DONE! When you are ready to order the same goods again, you can use your new template!</p>	 <p>The image shows a 'Save Warning' dialog box with the text: 'Do you want to save your changes? Click Yes to go back and save, or No to discard your changes.' There are two buttons: 'Yes' and 'No'. The 'No' button is highlighted with a red border.</p>
<p>7. To access your saved Templates, follow the navigation as seen on the right and you'll see your templates under the link  Templates.</p>	 <p>The image shows the Oracle eProcurement 'Create Requisition' page. The breadcrumb navigation at the top reads: 'Main Menu > eProcurement > Requisition'. The 'Templates' link in the main menu is highlighted with a red box. The 'Templates' link text is: 'Browse Company and Personal Templates', 'Adobe Products Yearly', and 'Test55'.</p>