MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

<mark>NEW: 05/01/2017</mark>

General Information

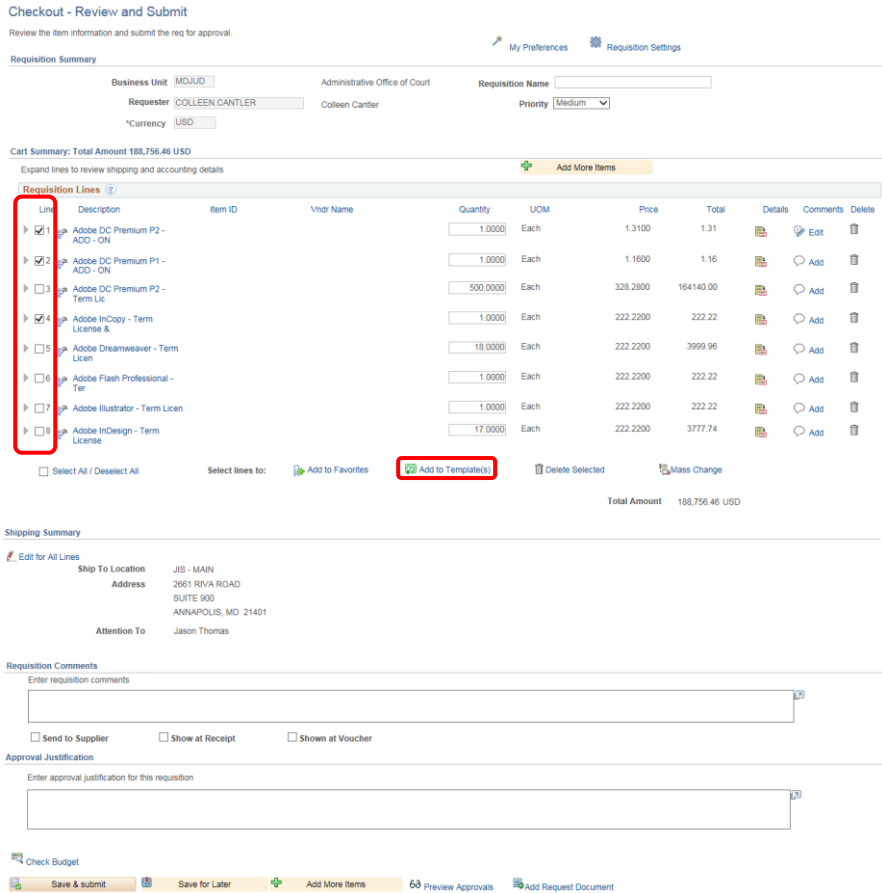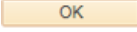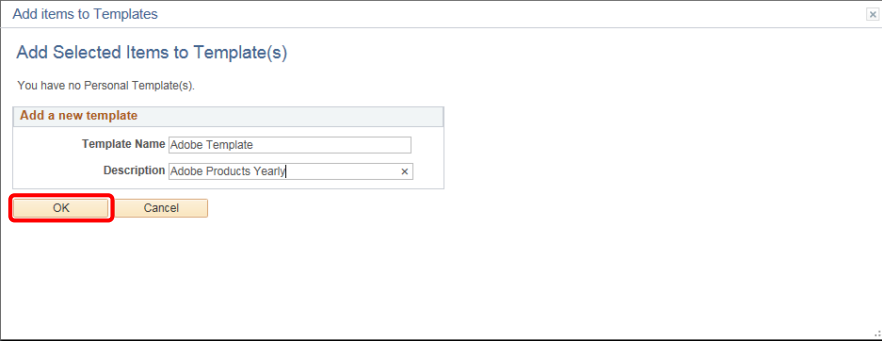| Task	Process Information
Creating a Requisition Template (for Recurring Requisitions) **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	**NOTE: As a prerequisite, please see the tip sheet for "Creating an eProcurement Requisition".** 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. 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.
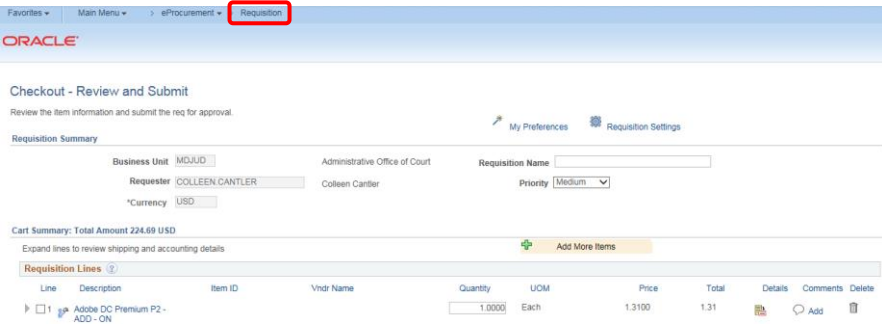
GEARS Navigation
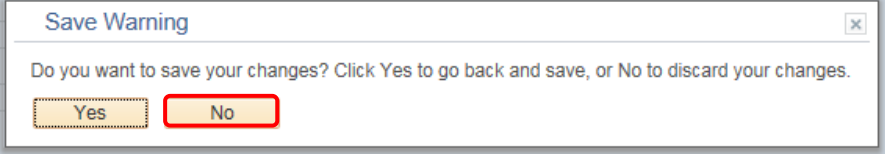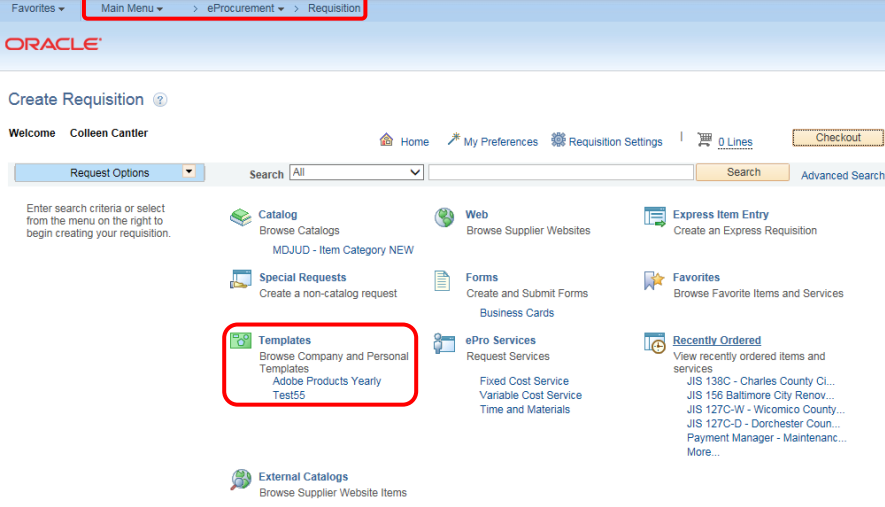
eProcurement > Manage Requisitions	Favorites ▾ Main Menu ▾ > eProcurement ▾ > Manage Requisitions

1.0   Process

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

STEP	ACTION	DETAILS
1.	a. **Find the requistion to be used as the source. (NOTE: Use the fields in the Search Requisitions section to narrow your search results).** b. **Choose "Copy Requisition" from the dropdown.** c. **Click the [Go] button.**	
2.	**The requisition will be copied, and the Create Requistion page will open.**	

3.	a. **Choose the lines to be saved on the template.** b. **Then click on the link** Add to Template(s) **Information carried over for each requisition line includes: Description, Vendor, Quantity, UOM, Price, Location, and Account.** **NOTE: Account is the only chartfield stored on the template.**	
4.	**Enter a Template Name and Description, and then click the OK button to save the template.** **NOTE: Make the Name and Description meaningful, so you can easily identify the template later.**	
5.	**You can cancel this requisition by clicking on Requisition on your menu.** **NOTE: This action cancels the Requisition, but not the Requisition Template.**	

6.	When you receive the **Save** message, click the [No] button. **NOTE: This action cancels the Requisition, but not the Requisition Template.** **DONE! When you are ready to order the same goods again, you can use your new template!**	
7.	**To access your saved Templates, follow the navigation as seen on the right and you'll see your templates under the link** 🔲 Templates .	

🛑 **End of Document**