

## Quick Reference Tip Sheet

**NEW: 12/11/2017**

### General Information


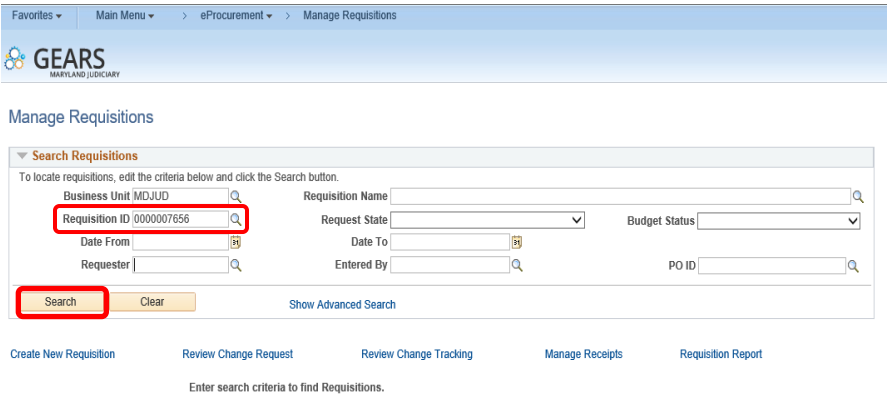

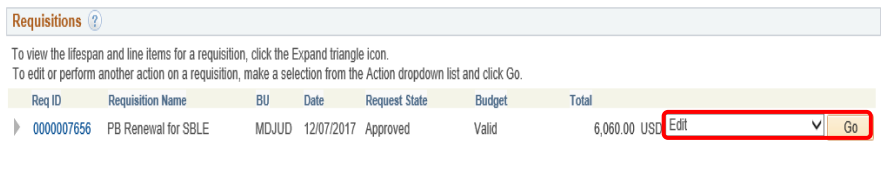

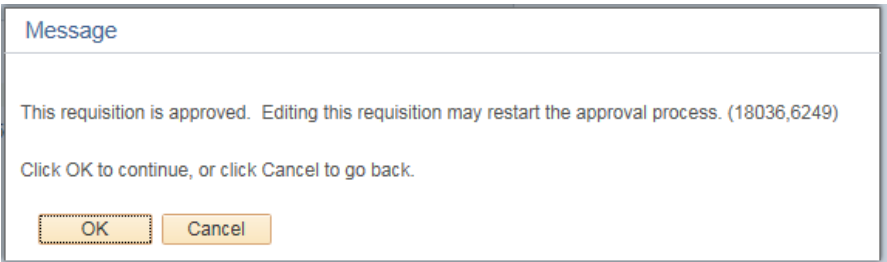
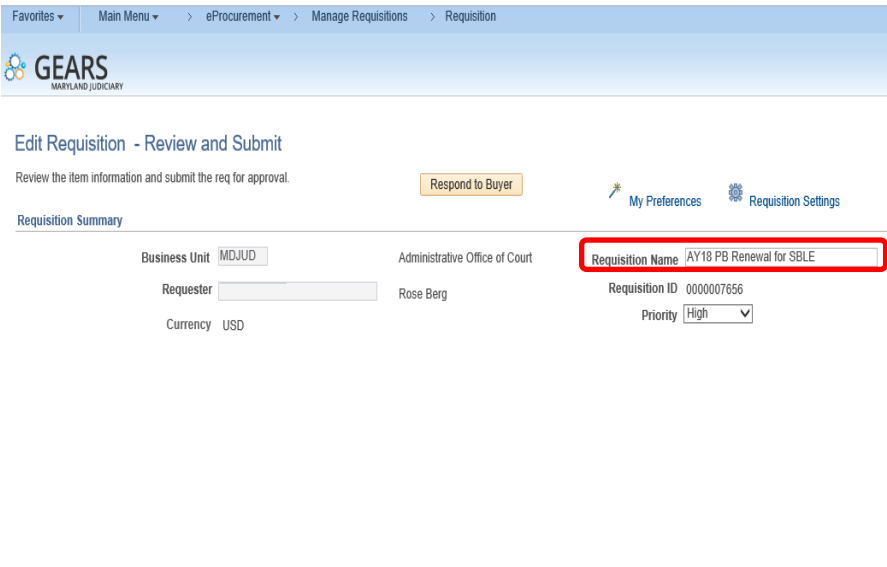
Task	Process Information
<p style="text-align: center;"><b>Modifying an eProcurement Requisition</b></p> <p><b>Note:</b> If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p>You can modify an ePro requisition if necessary. Modifications might include:</p> <ul style="list-style-type: none"> <li>• Adding/updating the requisition name (i.e. Add the AY – appropriation year)</li> <li>• Updating Quantity or Amount (Note: May trigger a PO change order)</li> <li>• Changes to Line Description, Ship To, etc.</li> </ul> <p><b>NOTES:</b></p> <ol style="list-style-type: none"> <li>1. This process should not be confused with correcting a requisition pushed back from the buyer. There is a separate tip sheet for the Requisition Push Back process.</li> <li>2. The chartfield distribution cannot be changed on a requisition that has been sourced to a PO (Batch Agency, PCA, Fund, etc.). If this is required, please contact your buyer in the Department of Procurement, Contract and Grant Administration (DPCGA).</li> <li>3. The current status of the requisition is important when you want to change your request:               <ol style="list-style-type: none"> <li>a. If the requisition has not been sourced to a purchase order, then changing the requisition results in an updated requisition.</li> <li>b. If the requisition has been sourced to a purchase order but not yet dispatched to the supplier, then changing the requisition results in an updated purchase order.</li> <li>c. If the requisition has been sourced to a purchase order and dispatched to the supplier, then changing the requisition results in the dispatch of a PO change order to the supplier.</li> </ol> </li> <li>4. Changes <u>may</u> require the ePro Requisition to be budget checked, and resubmitted for approval.</li> <li>5. Any questions, please contact DPCGA.</li> </ol>

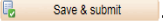
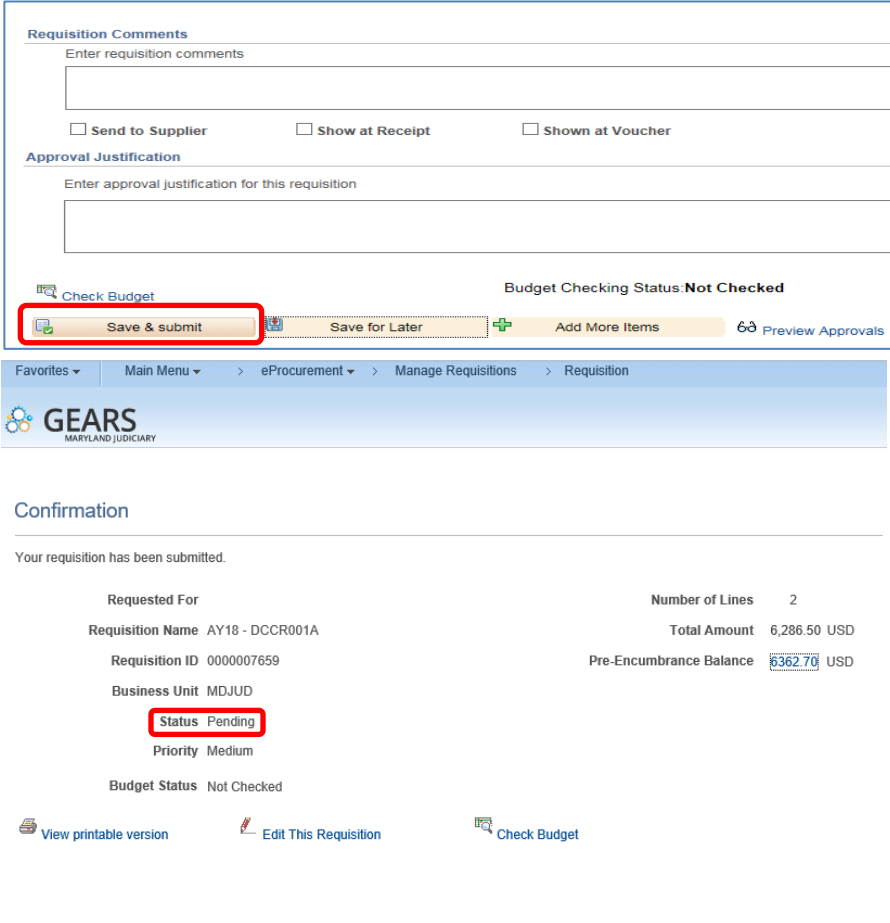

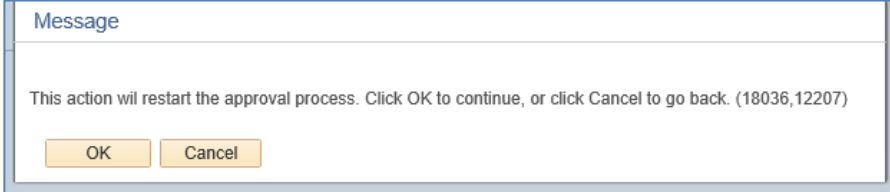
### GEARS Navigation


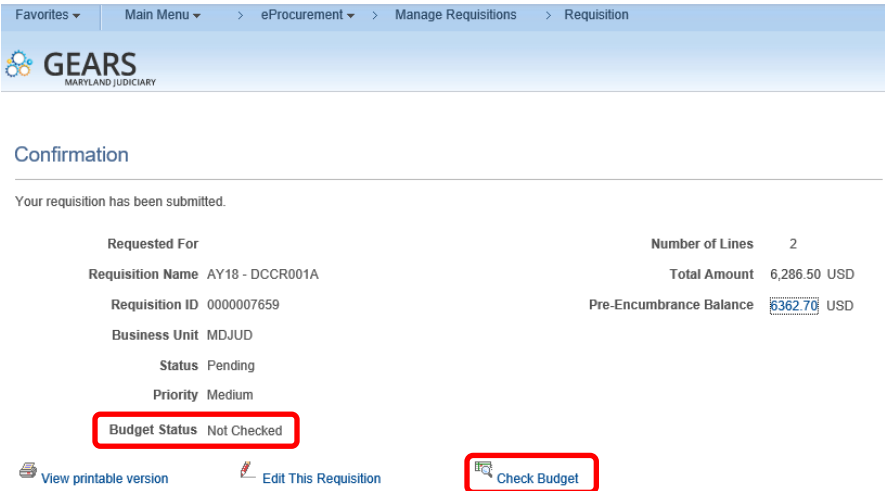
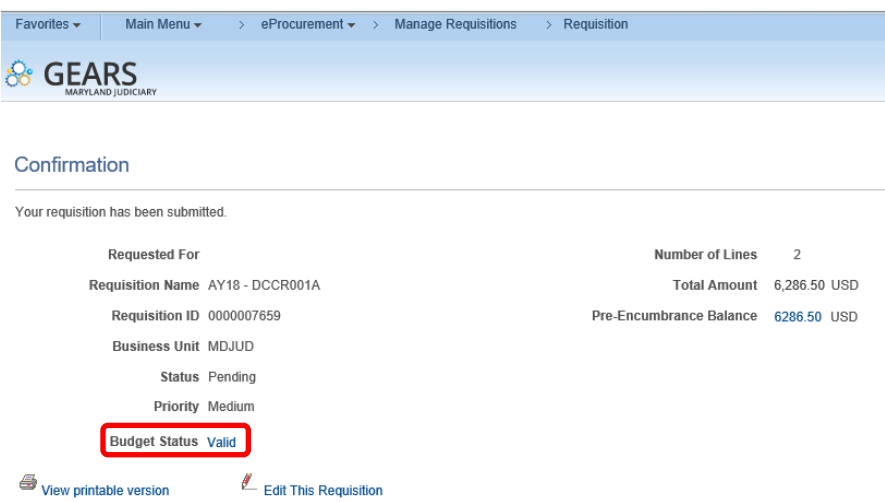
eProcurement > Manage Requisitions	<div style="background-color: #e1eef6; padding: 5px;"> <span style="margin-right: 10px;">Favorites ▾</span> <span style="margin-right: 10px;">Main Menu ▾</span> <span style="margin-right: 10px;">&gt;</span> <span style="margin-right: 10px;">eProcurement ▾</span> <span style="margin-right: 10px;">&gt;</span> <span style="margin-right: 10px;">Manage Requisitions</span> </div>
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**Process**

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

STEP	ACTION	DETAILS
1.	Enter your Requisition ID and then click  . If your requisition does not display, please confirm there is no data in any other fields (as shown).	
2.	Choose <b>Edit</b> from the dropdown menu and click  .	
3.	You'll receive this message if your requisition is Approved. Click  to continue.	
4.	<p>Modify the requisition as necessary. Modifications might include:</p> <ul style="list-style-type: none"> <li>• Add/updates to the Requisition Name (i.e. Add the AY – appropriation year)</li> <li>• Updates to Quantity or Amount (Note: This may trigger a PO change order)</li> <li>• Changes to Line Description, Ship To, etc.</li> <li>• Adding a new line</li> </ul> <p>In this example, the Requisition Name has been modified to include “AY18” (Appropriation Year).</p>	

	<p><b>Reminder:</b> It is a DBF requirement to begin all requisition names with the applicable fiscal year, i.e. AY18.</p>																						
<p><b>5.</b></p>	<p><b>NOTE:</b> Some requisition modifications require another Budget Check and Approval (i.e. changes to quantity or amount, adding a new line).</p> <p>Once you are done making changes to your requisition, click  .</p> <p>If necessary, the Status will change to <b>Pending</b> and your Requisition will be routed through the approval process again. Otherwise, the status will remain <b>Approved</b>.</p>	 <p><b>Requisition Comments</b> Enter requisition comments</p> <p><input type="checkbox"/> Send to Supplier    <input type="checkbox"/> Show at Receipt    <input type="checkbox"/> Shown at Voucher</p> <p><b>Approval Justification</b> Enter approval justification for this requisition</p> <p> Check Budget    Budget Checking Status: <b>Not Checked</b></p> <p> Save &amp; submit     Save for Later     Add More Items     Preview Approvals</p> <p>GEARS MARYLAND JUDICIARY</p> <p><b>Confirmation</b></p> <p>Your requisition has been submitted.</p> <table border="0"> <tr> <td>Requested For</td> <td>Number of Lines</td> <td>2</td> </tr> <tr> <td>Requisition Name</td> <td>Total Amount</td> <td>6,286.50 USD</td> </tr> <tr> <td>Requisition ID</td> <td>Pre-Encumbrance Balance</td> <td>6362.70 USD</td> </tr> <tr> <td>Business Unit</td> <td></td> <td>MDJUD</td> </tr> <tr> <td>Status</td> <td></td> <td><b>Pending</b></td> </tr> <tr> <td>Priority</td> <td></td> <td>Medium</td> </tr> <tr> <td>Budget Status</td> <td></td> <td>Not Checked</td> </tr> </table> <p> View printable version     Edit This Requisition     Check Budget</p>	Requested For	Number of Lines	2	Requisition Name	Total Amount	6,286.50 USD	Requisition ID	Pre-Encumbrance Balance	6362.70 USD	Business Unit		MDJUD	Status		<b>Pending</b>	Priority		Medium	Budget Status		Not Checked
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<p><b>6.</b></p>	<p>You might get this warning message. Click  to continue.</p>	 <p><b>Message</b></p> <p>This action will restart the approval process. Click OK to continue, or click Cancel to go back. (18036,12207)</p> <p> </p>																					

<p><b>7.</b></p>	<p>Next, review the Budget Status. If the Budget Status is <b>Not Checked</b>, you will need to click .</p>	 <p>The screenshot shows the 'Confirmation' page for a requisition. The 'Budget Status' is 'Not Checked', which is highlighted with a red box. At the bottom right, there is a 'Check Budget' button, also highlighted with a red box. Other details include: Requisition Name: AY18 - DCCR001A, Requisition ID: 0000007659, Business Unit: MDJUD, Status: Pending, Priority: Medium, Number of Lines: 2, Total Amount: 6,286.50 USD, and Pre-Encumbrance Balance: 6362.70 USD.</p>
<p><b>8.</b></p>	<p>Once the Budget Check is complete, verify that the Budget Status is <b>Valid</b>.</p>	 <p>The screenshot shows the 'Confirmation' page for a requisition. The 'Budget Status' is now 'Valid', which is highlighted with a red box. Other details are the same as in the previous screenshot: Requisition Name: AY18 - DCCR001A, Requisition ID: 0000007659, Business Unit: MDJUD, Status: Pending, Priority: Medium, Number of Lines: 2, Total Amount: 6,286.50 USD, and Pre-Encumbrance Balance: 6286.50 USD.</p>



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