

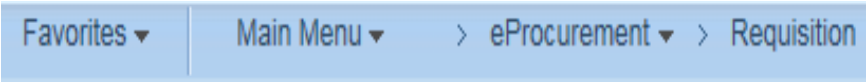
## Quick Reference Tip Sheet

**NEW: 05/01/2017**

### General Information


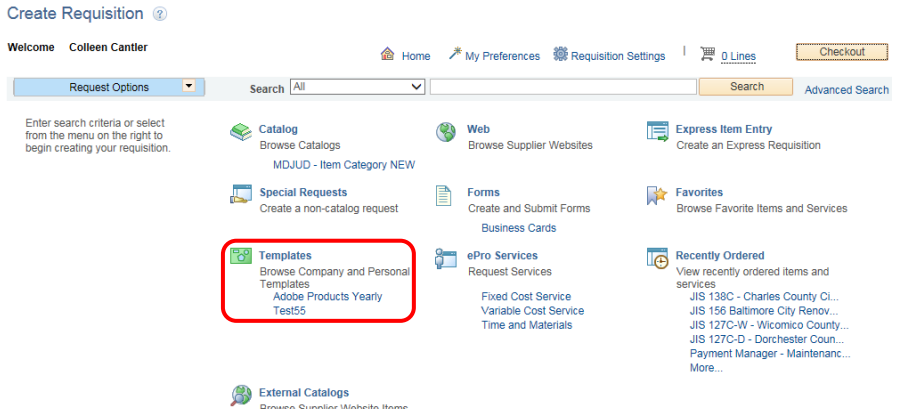

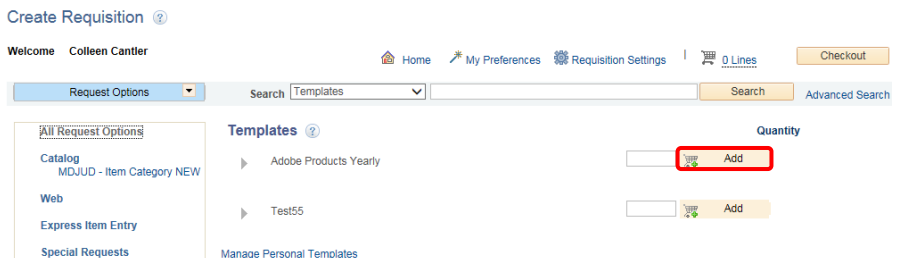
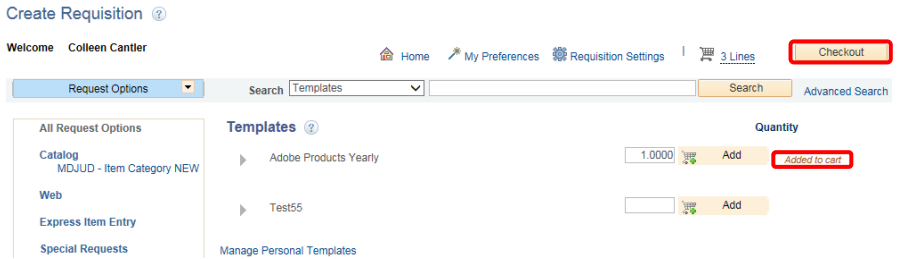

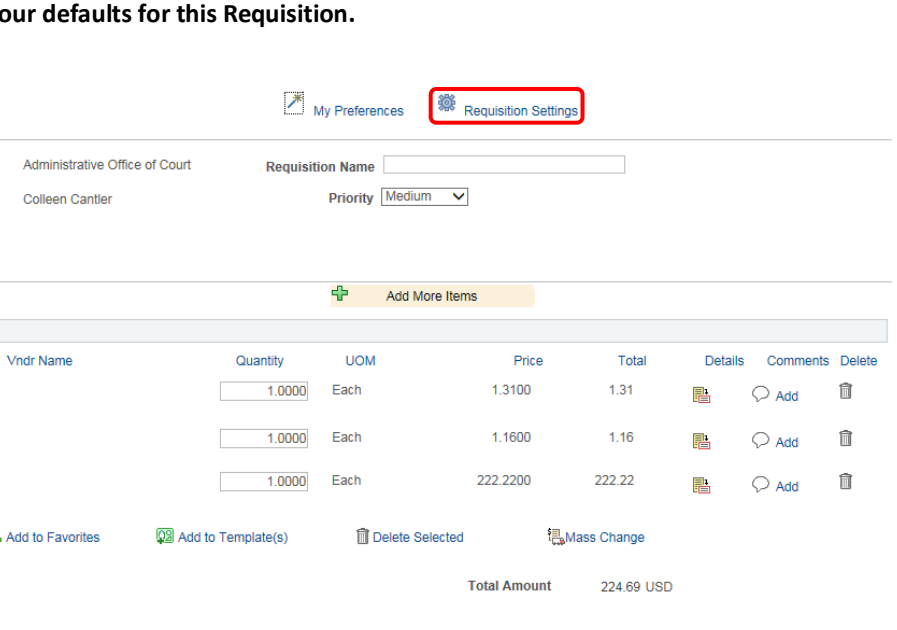
Task	Process Information
<p><b>Using a Requisition Template (for Recurring Requisitions)</b></p> <p><b>NOTE:</b> If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.</p>	<p><b>NOTE: As a prerequisite, please see the tip sheet for “Creating a Requisition Template”.</b></p> <p>Once created, a requisition template can be used for recurring orders. 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>


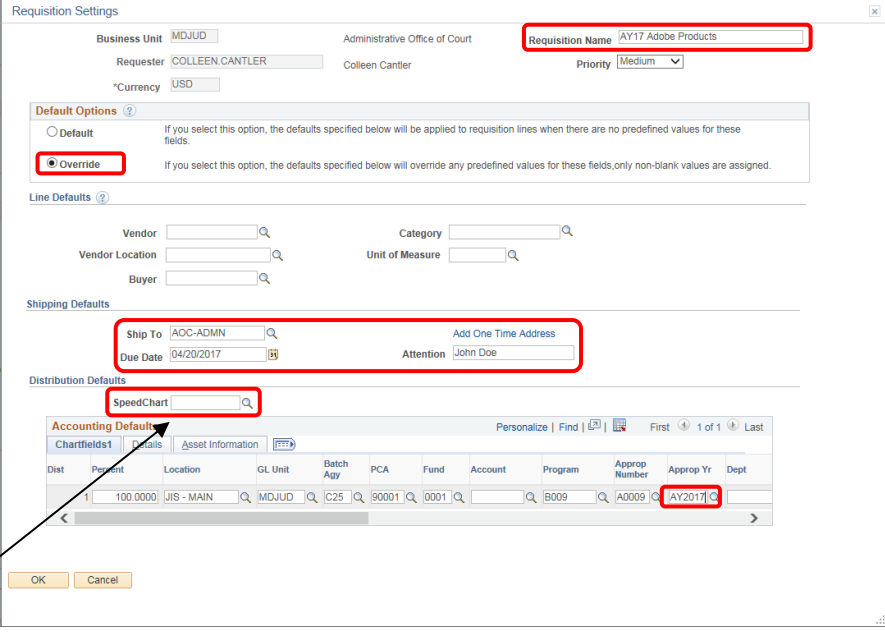
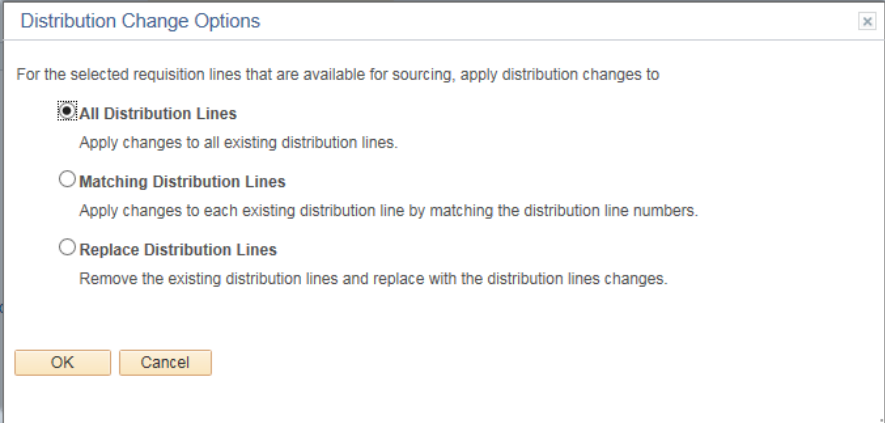
### GEARS Navigation

eProcurement > Requisition	
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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>From the list of Templates under the link  <a href="#">Templates</a>, click on the Template that you would like to use.</p>																																													
2.	<p>Click on the link  <b>Add</b> to the right of the template that you want to use.</p>																																													
3.	<p>Now the items are added to your Requisition (<i>Number of items added are displayed next to the Cart</i>).  Click <b>Checkout</b> to view your Requisition.</p>																																													
4.	<p>Click on the link  <a href="#">Requisition Settings</a>, to setup your defaults for this Requisition.</p>	 <p>Checkout - Review and Submit</p> <p>Review the item information and submit the req for approval.</p> <p>My Preferences <b>Requisition Settings</b></p> <p><b>Requisition Summary</b></p> <p>Business Unit: MDJUD Administrative Office of Court Requisition Name: <input type="text"/></p> <p>Requester: COLLEEN.CANTLER Colleen Cantler Priority: Medium</p> <p>*Currency: USD</p> <p><b>Cart Summary: Total Amount 224.69 USD</b></p> <p>Expand lines to review shipping and accounting details <a href="#">Add More Items</a></p> <p><b>Requisition Lines</b></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 InCopy - Term License &amp;</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> </tbody> </table> <p>Select lines to: <a href="#">Add to Favorites</a> <a href="#">Add to Template(s)</a> <a href="#">Delete Selected</a> <a href="#">Mass Change</a></p> <p><b>Total Amount 224.69 USD</b></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 InCopy - Term License &			1.0000	Each	222.2200	222.22			
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 InCopy - Term License &			1.0000	Each	222.2200	222.22																																							

<p><b>5.</b> On the pop-up window that opens, enter your <b>Requisition name</b>.</p> <p><b>NOTES:</b></p> <ol style="list-style-type: none"> <li>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, <b>AY17 Adobe Products</b>.</li> </ol> <p>Requisition Name: <input type="text"/></p> <ol style="list-style-type: none"> <li>Click on the <b>Override</b> radio button.</li> </ol> <p>The defaults entered on steps 3 &amp; 4 will populate on <u>ALL</u> your requisition lines.</p> <ol style="list-style-type: none"> <li>Enter the <b>Ship To</b>, <b>Due Date</b> and <b>Attention</b> fields, if needed.</li> <li>To use the <b>SpeedChart</b> field, you can search for your PCA by using the  feature. Notice that the <b>Account</b> and <b>Approp Yr</b> chartfields are blank. Enter the <b>Approp Yr</b> and leave the <b>Account</b> field <b>blank</b>.</li> </ol> <p>Click on the <input type="button" value="OK"/> button.</p>	
<p><b>6.</b> Click the <input type="button" value="OK"/> button to have the defaults applied to all distribution lines.</p>	

7.

**Checkout - Review and Submit**

Review the item information and submit the req for approval.

**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			

Select lines to: [Add to Favorites](#) [Add to Template\(s\)](#) [Delete Selected](#) [Mass Change](#)

Total Amount 10,000.00 USD

To add comments or attachments about line items, select the  icon at the far right of the line.

8.

You can add comments in the comments section and click on the [Add Attachments](#) icon to add attachments.

Navigate to the location of your file by clicking **Browse**, select your file and then click the **Upload** button.

**Note:** Please ensure that the file name does not exceed 65 characters as it will fail.

After the attachment has been successfully uploaded, click the [OK](#) button.

**Line Comment**

Business Unit: MDJUD Requisition Date: 02/15/2017  
 Requisition ID: 0000005636 Status: Pending  
 Line: 1

Comments

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](#)

**File Attachment**

[Browse...](#)

[Upload](#) [Cancel](#)

**Message**

File Attachment failed to upload. (18036,10013), File name is too long, it should not exceed 65 characters. (18036,10025)

[OK](#)

**Line Comment**

Business Unit: MDJUD Requisition Date: 03/01/2017  
 Status: Open  
 Line: 1

Comments

Entered On: 03/01/2017 12:53:42PM

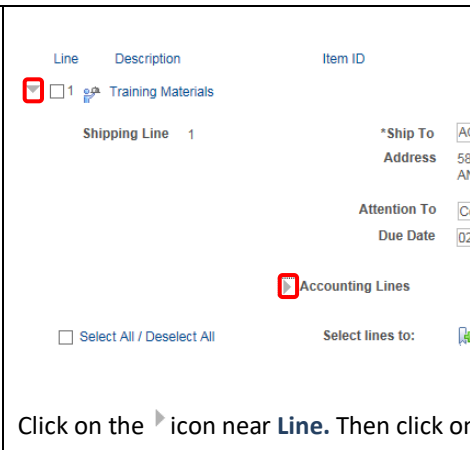
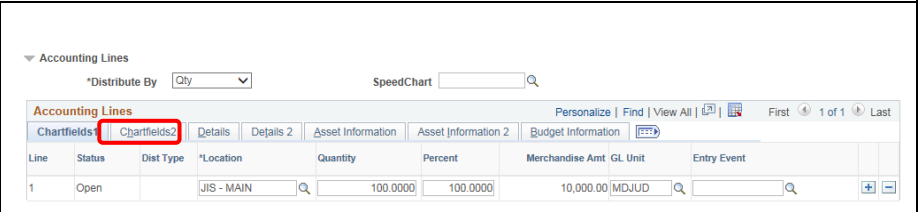
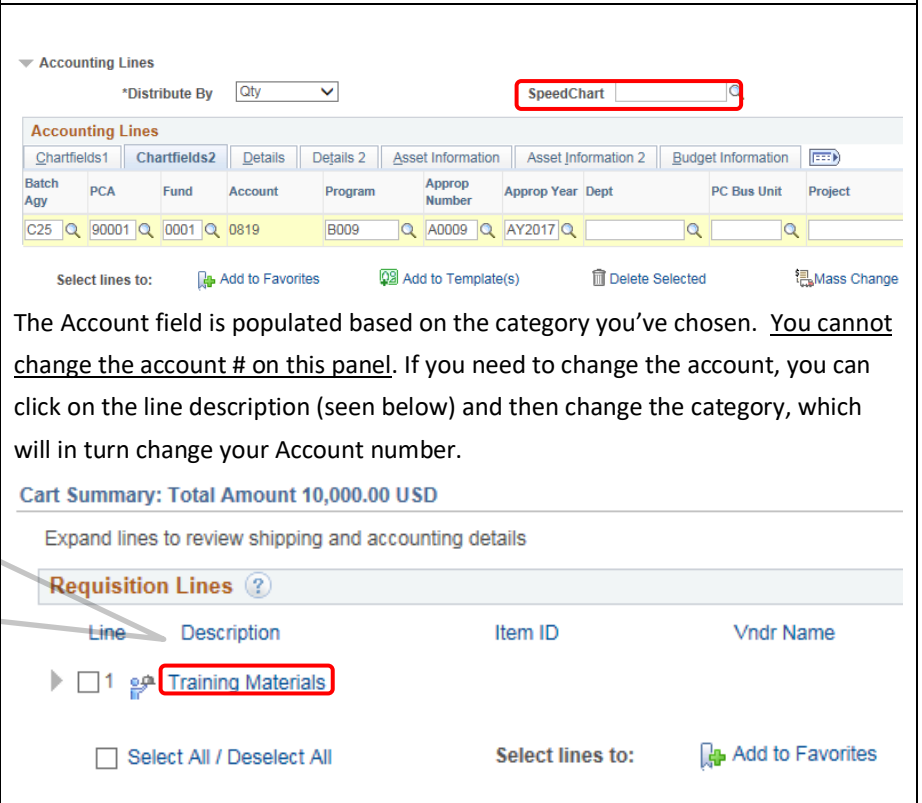
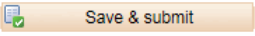
1 test












Send to Supplier  Show at Receipt  Show at Voucher

[Add Attachments](#)

Attached File	User/Date Time	View	Send to Supplier
Using_Notify_Tip_Sheet_02-22_2017.docx	esther bouryng2017-03-01-13:26:51:923	<a href="#">View</a>	<input type="checkbox"/>

[OK](#) [Cancel](#)

<p><b>9.</b></p>		<p>Click on the ▶ icon near <b>Line</b>. Then click on the ▶ icon near <b>Accounting Lines</b></p>								
<p><b>10.</b></p>	<p>Click on the tab <b>Chartfields 2</b> to view your chartfields.</p>									
<p><b>11.</b></p>	<p>If you need to change the PCA on the Req. line, you can do so by entering the PCA in the <b>SpeedChart</b> field. If you change the PCA, you'll have to re-enter the <b>Approp Yr</b>.</p> <div data-bbox="180 1346 646 1598" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p><b>Special Requests</b> ⓘ</p> <p>Enter information about the non-catalog item you would like to order.</p> <p><b>Item Details</b></p> <p>*Item Description Training Materials</p> <p>*Price 100.0000</p> <p>*Quantity 100.0000</p> <p>*Category 0819</p> </div>	 <p>The Account field is populated based on the category you've chosen. <u>You cannot change the account # on this panel.</u> If you need to change the account, you can click on the line description (seen below) and then change the category, which will in turn change your Account number.</p> <p><b>Cart Summary: Total Amount 10,000.00 USD</b></p> <p>Expand lines to review shipping and accounting details</p> <p><b>Requisition Lines</b> ⓘ</p> <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Item ID</th> <th>Vndr Name</th> </tr> </thead> <tbody> <tr> <td>▶ 1</td> <td>Training Materials</td> <td></td> <td></td> </tr> </tbody> </table> <p>☐ Select All / Deselect All      <b>Select lines to:</b> Add to Favorites</p>	Line	Description	Item ID	Vndr Name	▶ 1	Training Materials		
Line	Description	Item ID	Vndr Name							
▶ 1	Training Materials									
<p><b>12.</b></p>	<p>Click the  link at the bottom of the page.</p>									

<p><b>13.</b></p> <p>On the Confirmation page, you'll see your Requisition number.</p> <p>Budget Check your Req. by clicking on the link  .</p> <p>You'll see a  processing graphic on the top right side of your screen.</p>	<p><b>Confirmation</b></p> <p>Your requisition has been submitted.</p> <p>Requested For Colleen Cantler <span style="float: right;">Number of Lines 1</span></p> <p>Requisition Name AY17 Sharp Maint. Review <span style="float: right;">Total Amount 10,000.00 USD</span></p> <p><b>Requisition ID 0000005636</b></p> <p>Business Unit MDJUD</p> <p>Status Pending</p> <p>Priority Medium</p> <p>Budget Status Not Checked</p> <p> View printable version  Edit This Requisition  Check Budget</p> <p><b>JIS Approvals</b></p> <p>AY17 Sharp Maint. Review:Pending</p> <p>JIS Approvals</p> <p>Pending Multiple Approvers JIS Level 1 Approver → Not Routed Multiple Approvers JIS Level 2 Approver → Not Routed Multiple Approvers Dept of Budget Approver</p> <p>Apply Approval Changes</p> <p> Create New Requisition  Manage Requisitions</p>
<p><b>14.</b></p> <p>Once the Budget Check completes, verify that your Budget Status is Valid.</p> <p>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:</p> <ol style="list-style-type: none"> <li>1. Your Requisition has been <b>Approved</b>.</li> <li>2. The PO associated with your Req. is <b>Dispatched</b> to the Vendor.</li> </ol>	<p><b>Confirmation</b></p> <p>Your requisition has been submitted.</p> <p>Requested For Colleen Cantler <span style="float: right;">Number of Lines 1</span></p> <p>Requisition Name AY17 Sharp Maint. Review <span style="float: right;">Total Amount 10,000.00 USD</span></p> <p>Requisition ID 0000005636 <span style="float: right;">Pre-Encumbrance Balance 10000.00 USD</span></p> <p>Business Unit MDJUD</p> <p><b>Status Pending</b></p> <p>Priority Medium</p> <p><b>Budget Status Valid</b></p> <p> View printable version  Edit This Requisition</p> <p><b>JIS Approvals</b></p> <p>AY17 Sharp Maint. Review:Pending</p> <p>JIS Approvals</p> <p>Pending Multiple Approvers JIS Level 1 Approver → Not Routed Multiple Approvers JIS Level 2 Approver → Not Routed Multiple Approvers Dept of Budget Approver</p> <p>Apply Approval Changes</p> <p> Create New Requisition  Manage Requisitions</p>

 End of Document