

June 11, 2017

All:

Below are a few GEARS updates and important year-end information. Please be sure to read through this document, paying particular attention to those areas that relate to your position responsibilities.

Attachments – As many users may know, since the 9.2 upgrade, the GEARS system has experienced some issues with attachments. Please be assured that the GEARS Team continues to review and analyze these issues to find a permanent resolution(s). At this time, if a user notices an issue, please review and complete the tips on the Internet Explorer Maintenance Sheet found under the What’s New section of the GEARS site before completing a Service Now ticket.

Purchase Order Reviews – The GEARS Team added PCA as a lookup option under the Review PO information page. Please use this navigation to review PO’s for your PCA. The navigation page, Purchase Order (Search PCA) is no longer active.

Favorites > Main Menu > Purchasing > Purchase Orders > Review PO Information > Purchase Orders

GEARS
MARYLAND JUDICIARY

Purchase Order Inquiry

Enter any information you have and click Search! Leave fields blank for a list of all values.

[Find an Existing Value](#)

Search Criteria

Business Unit	=	MDJUD	Q
PO ID	begins with		
Contract SetID	begins with		Q
Contract ID	begins with		Q
Release Number	=		
Purchase Order Date	=		Q
PO Status	=		
Program Cost Account	begins with		
Vendor ID	begins with		Q
Vendor Name	begins with		Q
Buyer	begins with		Q
Buyer Name	begins with		Q

Security Role Queries – Please review the security queries on a regular basis to ensure that staff have the appropriate roles for their work functions. The queries can be run based on your PCA or rule (see below). Both queries display GEARS user roles and have the option to include “locked accounts” in the results. A locked account is a User ID account that has been made inactive.

- AOC_SECTY_USERS_BY_PCA, i.e. 60091, C0300
- AOC_SECTY_USERS_BY_RULE, i.e. JUD01, AOC_HR

Worklist Colors – The GEARS team has been able to restore the color difference in the worklist links that was in place in the 9.1 environment. Links that have been reviewed previously will be red until they are marked as worked or action has been taken to remove them from your worklist.

FY17 YEAR-END – It is critical that you read this information to stay up to date in requirements and possible changes for the Judiciary to have a smooth year-end process. Please also be sure to review the full FY17 year-end memo and checklist on a regular basis to ensure that you are in compliance with all required items. Both documents can be found on the GEARS site for further details.

- A. Ongoing review of open purchasing documents. This should continue throughout June on a regular basis. Procurement has been steadily closing requested PO’s and also sends close notifications back to the requestor.

Friday, June 9	PTP – Purchasing	On-going review and monitoring of open requisitions and purchase orders.
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- B. Please review your vouchers using the Voucher Activity Page. DBF continues to find many vouchers that have not been budget checked, not submitted for approval, pending approval, or have an associated match exception. These issues keep the voucher in a pending status and DBF is not able to process the voucher any further. Additional guidance for using the voucher activity page can be found on the GEARS site. To avoid running into match exceptions on vouchers, we recommend that you run a PO Buydown report to check availability on PO lines before completing a voucher linked to the PO. These issues are frequently happening on copier invoices. Please notify Procurement or Budget and Finance if you run into an exception to receive assistance.

Friday, June 9	PTP – Purchasing	On-going review and monitoring of voucher statuses utilizing the voucher activity page.
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- C. Timely creation of required AY18 requisitions – Time is of the essence in completing any remaining required requisitions in order to have AY18 Purchase Orders ready on time. Please be sure to have the requisitions approved to have them continue through the process.

- D. The deadline for Express PO’s is coming up this Friday, June 16th. Please be sure that all Express PO’s required for your office orders or other items have been completed.

Friday, June 16	PTP – Purchasing	Complete all ordering and Express PO’s for FY17 to allow for receipt and voucher entry by July 14.
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E. Budget and Finance has encountered problems in previous year-ends with Post Office box rentals. These invoices are due June 30 and the Post Office is not very forgiving if they are not paid by this date. They will often close the boxes and refuse mail delivery. To prevent any issues, please process these invoices as soon as they are received and give a quick call to AP staff or do an email to judiciary.finance.accounts.payable.unit@mdcourts.gov to let our staff know.

F. Additional details regarding grant accruals should be distributed soon.

Monday, June 12 (approximately)	PTP – Purchasing	Grant Awarding Departments – Please watch for and review email information from the DBF for guidance on your year-end grant accruals due by July 7.
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G. It is important that the processing of daily deposits is kept current as we get close to the end of the year. The weekend of June 24th and 25th would be a good time to complete any catch-up work as needed.

Saturday, June 24 and Sunday, June 25	OTC – Order to Cash	GEARS Users – Recommended weekend for courts to “catch-up” and process any outstanding deposits.
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H. Please ensure that interest earned on Escrow accounts is transferred.

Thursday, June 15	OTC – Order to Cash	Circuit Court only – Transfer all interest earned on Escrow Accounts to account 8049.
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As always, please feel free to contact me or the Service Desk if you should have any questions or need further assistance.

Thank you,
Tammy

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