

All:

The GEARS team would like to provide notice to all users of the following announcements and reminders.

Scheduling a Query – A new tip sheet on how to schedule a query has been created and is available on the GEARS courtnet site under the “General” tip sheet section. The demands on the system vary on whether a query is run for immediate results or whether it is scheduled. Scheduling a query will allow the query to run faster and the actual timing of the scheduling only has to be for some time in the future, even for just a few a few minutes later. The GEARS team has found that scheduling queries is especially useful when running large queries that have to sort through lots of data, such as during the OTC end of month process. Please take a few minutes to review the tip sheet and if you have any questions, let the team know.

https://mdcourts.gov/sites/default/files/import/gears/tipsheets92/general/gears_howtoscheduleaquery.pdf

PROCURE TO PAY:

Requisition Notification Email *New* – The GEARS team has developed a new automated email requisition notification. The emails will be sent out weekly beginning Monday, November 5, and will assist our users in monitoring their requisitions and pre-encumbrances more closely. Specifically, the emails will be sent to the requisition creator, as well as all people that have approved the requisition to date. The requisitions included in the notifications will be those that are older than 30 days from the email date and are in open status (not fully approved, not successfully budget checked or not submitted for approval). It is important that these emails are reviewed timely and appropriate action is taken. The subject line of the emails will be “**Requisition requires your attention.**” Please see below for a sample of the email content.

A requisition must have a valid budget status and be approved for the Procurement Department to issue a related purchase order. The below requisition does not meet this criteria. Please review the information and take the appropriate required action(s) or if the requisition is no longer needed, please cancel it.

Requisition Number: 0000009010

Requisition Date: 2018-08-28

Requisition Amount: \$56,729.00
Requisition Description: FY19 DCREP Coordinator
Approval Status: Pending
Budget Status: Error

If you have any questions, please contact Procurement.

Express PO Notification Email *New* – The GEARS team has developed a new automated email Express PO notification. The emails will be sent out the first Monday of each month, beginning Monday, November 5, and will assist our users in monitoring their Express PO's and encumbrances more closely. Specifically, the emails will be sent to the Express PO creator, as well as all people that have approved the Express PO to date. The Express PO's included in the notifications will be those that have not had any voucher activity within 30 days from the email date and are approved and dispatched with an open balance. It is important that these emails are reviewed timely and appropriate action is taken. The subject line of the emails will be “**Express PO requires your attention.**” Please see below for a sample of the email content.

The Express PO(s) (details seen below) have not had any voucher activity in the past 30 days. Please review the information and take the appropriate required action(s) or if the Express PO is no longer needed, please cancel it.

PO Date: 2018-08-30
PO Number: 0000069558
PO Total Amount: \$197.12
PO Description: BPO - Office Supplies
Total Vouchered Amount: \$.00
PO Balance: \$197.12

If you have any questions, please contact Procurement.

Procurement Inquiry Page *New* – The GEARS team has developed a new fully customized procurement inquiry page. This page offers a variety of ways to access documents related to a procurement, such as contract, requisition, purchase order, receipt, or voucher. In addition, further details based on vendor, PCA, accounts, fiscal or appropriation year, or statuses, etc. can be found when an initial selection criteria of requisition, receipt, PO or contract has been selected. This page operates very similar to the voucher activity inquiry page with multiple selection opportunities and results that can be downloaded into Excel. In addition, the page is secured by our standard user PCA security. Please

review the new tip sheet found on the GEARS courtnet site titled "Using the Procurement Activity Inquiry Page." It can found with the below link.

<https://mdcourts.gov/sites/default/files/import/gears/pdfs/ptpprocurementactivityinquiry20181002.pdf>

If you should any questions about the above information, please feel free to contact me.

Thank you,
Tammy

Tammy Sitar, CPA
Maryland Judiciary
Deputy Director Budget and Finance
GEARS, Project Team
580 Taylor Avenue, Bldg A-4
Annapolis, MD 21401
410-260-1419
410-260-1290 Fax
tammy.sitar@mdcourts.gov