MARYLAND JUDICIARY

G E A R S
General Enterprise And Resource Support
Quick Reference Tip Sheet

General Information

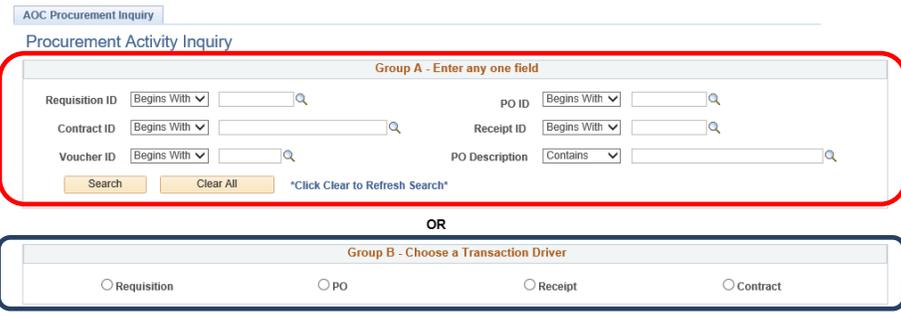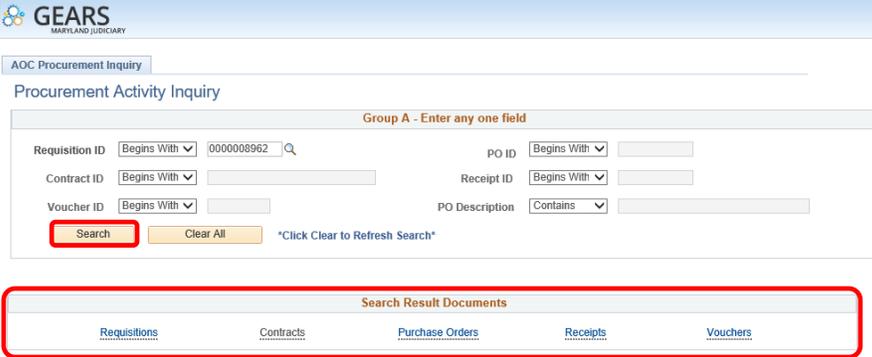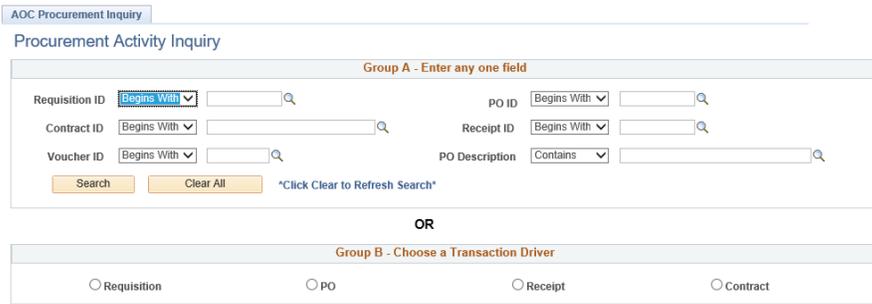| Task	Process Information
Using the **Procurement Activity Inquiry** page **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	The **Procurement Activity Inquiry** page was designed to give users an efficient tool to view documents within the Procurement lifecycle, i.e. Requisitions, PO's, Contracts, Receipts and Vouchers. The inquiry will return information about the document(s) searched for and all the associated documents. For example, a search for a PO will return any Req., Contract, Receipt and Voucher information associated with that PO.

GEARS Navigation

Main Menu -> Purchasing -> Purchase Orders -> Review PO information -> Procurement Activity Inquiry	Main Menu ▾ › Purchasing ▾ › Purchase Orders ▾ › Review PO Information ▾ › AOC Procurement Inquiry

Process

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

STEP	ACTION	DETAILS
1.	The Procurement Activity Inquiry has two distinct parts. With any inquiry, only one part can be used at a time, either Group A or Group B. <u>**Note:**</u> All searches are controlled by PCA security.	AOC Procurement Inquiry Procurement Activity Inquiry **Group A - Enter any one field** Requisition ID [Begins With ▾] [🔍] PO ID [Begins With ▾] [🔍] Contract ID [Begins With ▾] [🔍] Receipt ID [Begins With ▾] [🔍] Voucher ID [Begins With ▾] [🔍] PO Description [Contains ▾] [🔍] [Search] [Clear All] *Click Clear to Refresh Search* **OR** **Group B - Choose a Transaction Driver** ○ Requisition ○ PO ○ Receipt ○ Contract

2.	**Use of Group A:** This area was designed for inquiries that are related to a specific document for any of the fields shown. For example, an exact requisition number could be entered to see the related PO, Contract, Receipt(s) and Voucher(s).	
3.	To go further with the example stated above, enter a Req. number and select the ⬚Search button. Seen below are the **Search Result Dcouments** with links to the Req. details and the documents associated with it. Select the links to get more respective information on each document type. Notice that the Contracts link is gray denoting that there isn't a Contract associated to the Req. (This would apply to any of the other links as well.)	
4.	Shown is an example of the information displayed when the Requisition link is selected.	
5.	To return to the initial inquiry page, select the ⬚Clear All button.	

| **6.** | **Use of Group B:**

This area was designed for more complex searches.

The first step is to select one of the transaction drivers at the top of Group B. Once a transaction driver is selected in Group B, **Group A** is no longer displayed.

Note: To return to the initial inquiry page, select the [Clear All] button. | AOC Procurement Inquiry
Procurement Activity Inquiry
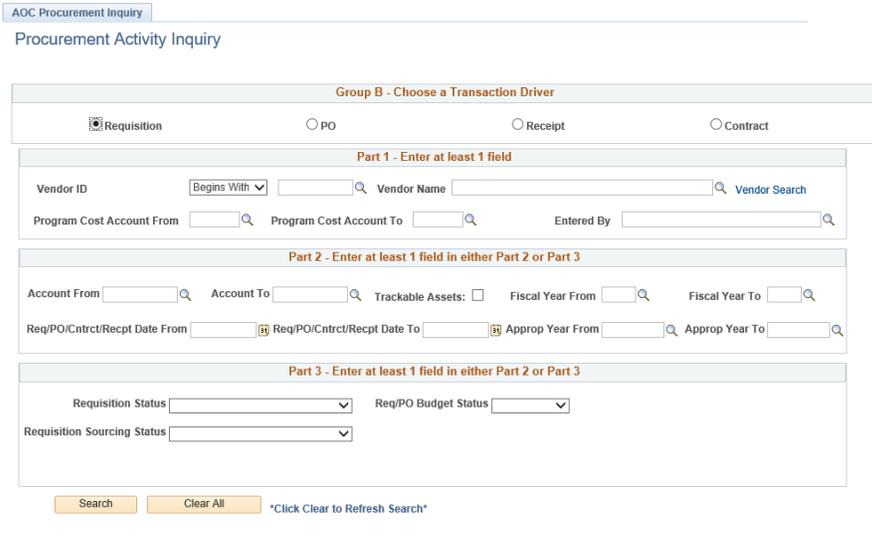
Group B - Choose a Transaction Driver
◉ Requisition   ○ PO   ○ Receipt   ○ Contract

Part 1 - Enter at least 1 field
Vendor ID [Begins With ▾] [ ] 🔍 Vendor Name [ ] 🔍 Vendor Search
Program Cost Account From [ ] 🔍 Program Cost Account To [ ] 🔍 Entered By [ ] 🔍

Part 2 - Enter at least 1 field in either Part 2 or Part 3
Account From [ ] 🔍 Account To [ ] 🔍 Trackable Assets: ☐ Fiscal Year From [ ] 🔍 Fiscal Year To [ ] 🔍
Req/PO/Cntrct/Recpt Date From [ ] 📅 Req/PO/Cntrct/Recpt Date To [ ] 📅 Approp Year From [ ] 🔍 Approp Year To [ ] 🔍

Part 3 - Enter at least 1 field in either Part 2 or Part 3
Requisition Status [▾] Req/PO Budget Status [▾]
Requisition Sourcing Status [▾]

[Search] [Clear All] *Click Clear to Refresh Search* |
| **7.** | Notice that in **Group B**, the search criteria fields are divided into 3 parts.

Enter at least 1 field in **Part 1** and at least 1 field in **Part 2 or Part 3**. There is not a maximum number of entries; if need be, all fields can be completed.

Note: Please fill in as many fields as possible, as doing so will facilitate quicker and more fine-tuned results.

Enter all applicable information into the fields and select the [Search] button.

The **Search Result Documents** appear at the bottom of the page. Select each of the links for each document type to view detailed information. | AOC Procurement Inquiry
Procurement Activity Inquiry
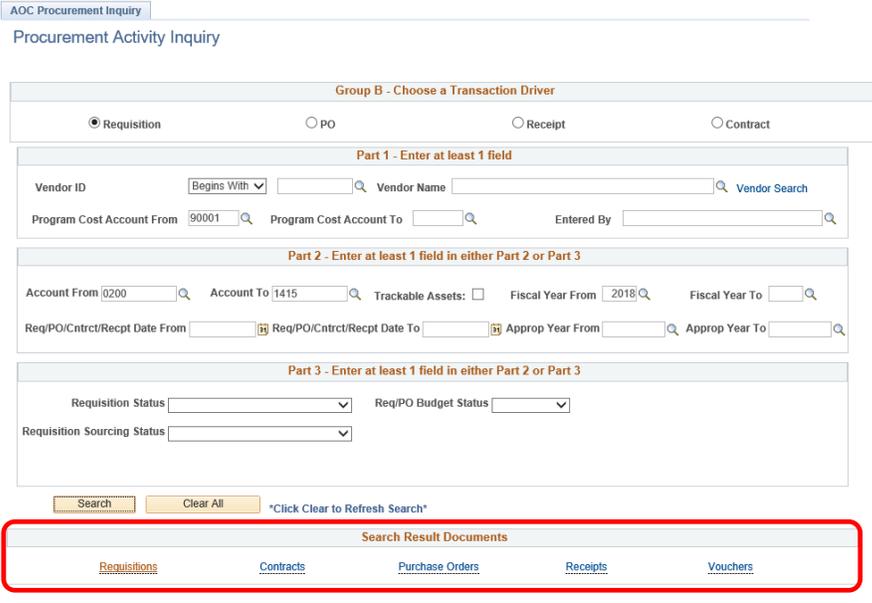
Group B - Choose a Transaction Driver
◉ Requisition   ○ PO   ○ Receipt   ○ Contract

Part 1 - Enter at least 1 field
Vendor ID [Begins With ▾] [ ] 🔍 Vendor Name [ ] 🔍 Vendor Search
Program Cost Account From [90001] 🔍 Program Cost Account To [ ] 🔍 Entered By [ ] 🔍

Part 2 - Enter at least 1 field in either Part 2 or Part 3
Account From [0200] 🔍 Account To [1415] 🔍 Trackable Assets: ☐ Fiscal Year From [2018] 🔍 Fiscal Year To [ ] 🔍
Req/PO/Cntrct/Recpt Date From [ ] 📅 Req/PO/Cntrct/Recpt Date To [ ] 📅 Approp Year From [ ] 🔍 Approp Year To [ ] 🔍

Part 3 - Enter at least 1 field in either Part 2 or Part 3
Requisition Status [▾] Req/PO Budget Status [▾]
Requisition Sourcing Status [▾]

[Search] [Clear All] *Click Clear to Refresh Search*

Search Result Documents
Requisitions   Contracts   Purchase Orders   Receipts   Vouchers |

Search Criteria Descriptions

Field Name	Description
Vendor ID	Enter a Vendor ID or search for a Vendor ID using the 🔍 .
Vendor Name	Enter a Vendor name or search for a Vendor name using the 🔍
Program Cost Account	Enter a PCA or search for a PCA using the 🔍 .
Entered by	Enter the User ID of the person who created the document or search for the User ID using the 🔍 .
Account	Enter an Account number or search for an Account number using the 🔍 .
Trackable Assets	This check box will return searches with the following account codes 10XX, 11XX, 14XX, 0701, 0703, 0804 and 0858.
Fiscal Year	Enter the Fiscal Year or search for a Fiscal Year using the 🔍 .
Req/PO/Cntrct/Recpt Date	Depending on the **Transaction Driver** chosen, enter the Req., PO, Contract or Receipt Date.
Approp Year	Enter an Approp Year or search for an Approp Year using the 🔍 .

End of Document