MARYLAND JUDICIARY

GEARS General Enterprise And Resource Support

Quick Reference Tip Sheet

LAST REVISED DATE: 07/16/2018

General Information

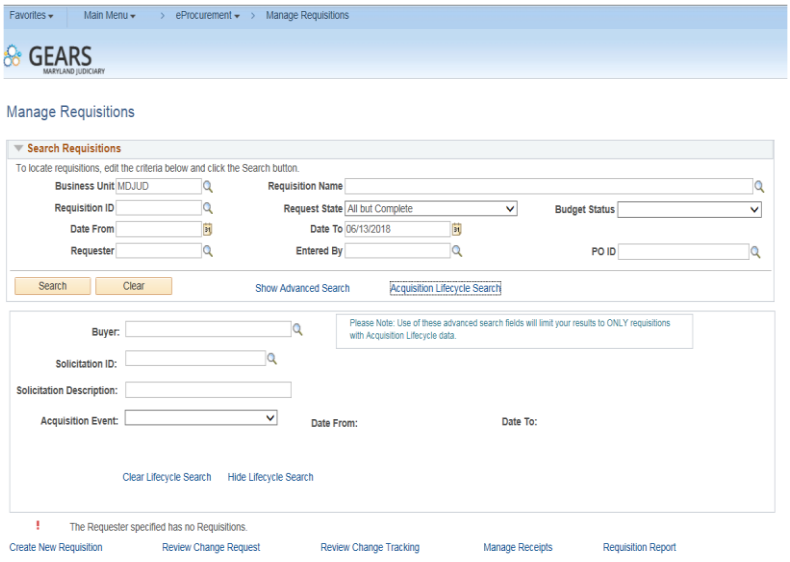
Task	Process Information
Navigating the Acquisition Lifecycle (for Field and Non-DPCGA users) **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	The GEARS Acquisition Lifecycle is a repository for solicitation, vetting and contract execution activities that occur during an acquisition's lifecycle. Minimum requirements for inclusion are as follows: • Requisition >= $25,000 • A Buyer is assigned to the Requisition • Requisition is in 'Approved' status DPCGA buyers are able to ***add*** as well as ***update*** the repository, while non-DPCGA users will have ***read-only*** access. Note: Your results may be limited by PCA access. For non-DPCGA users, there are two ways to access the Acquisition Lifecycle: • Manage Requisitions • Acquisition Lifecycle Search

GEARS Navigation

Option I:

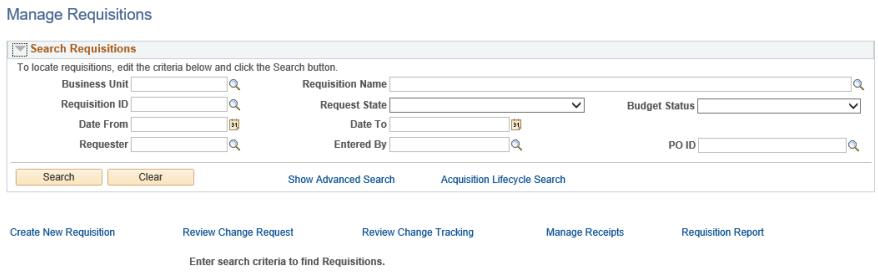
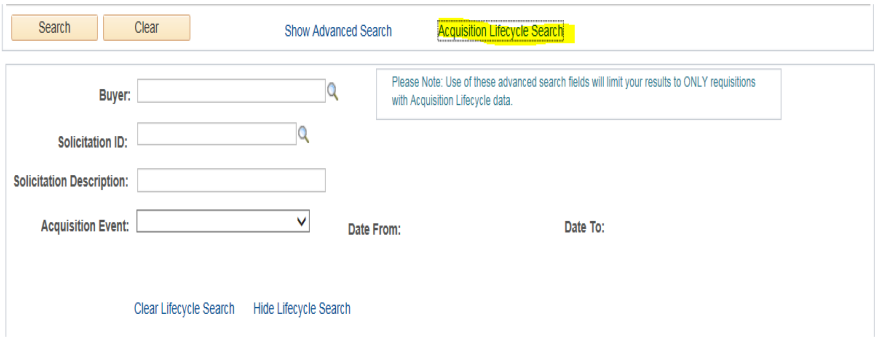
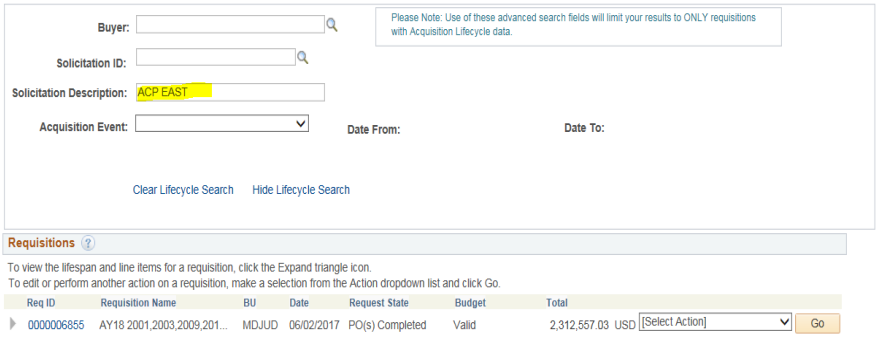
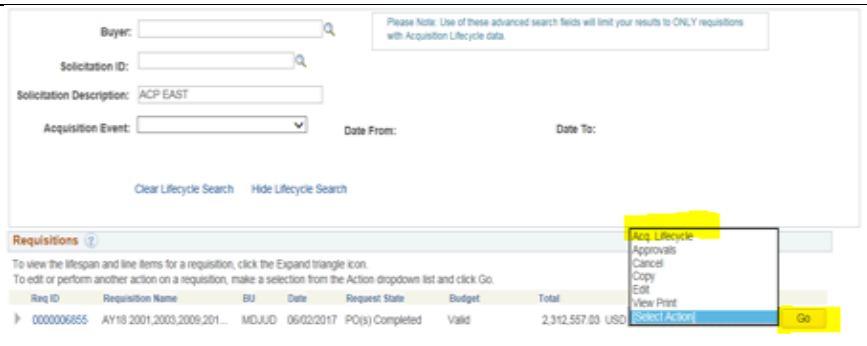
Navigation:
Main Menu > eProcurement > Manage Requisitions

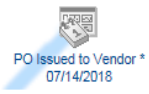
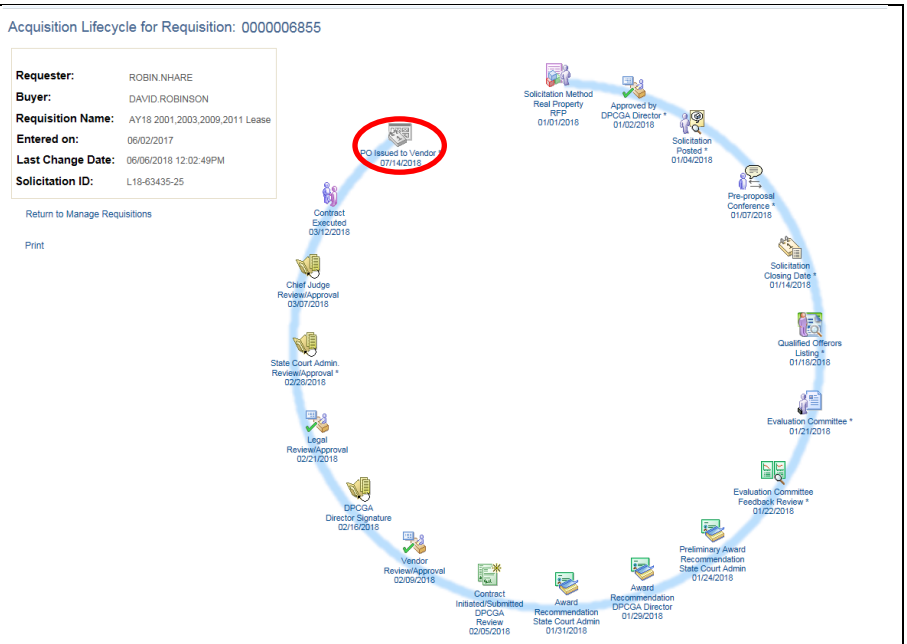
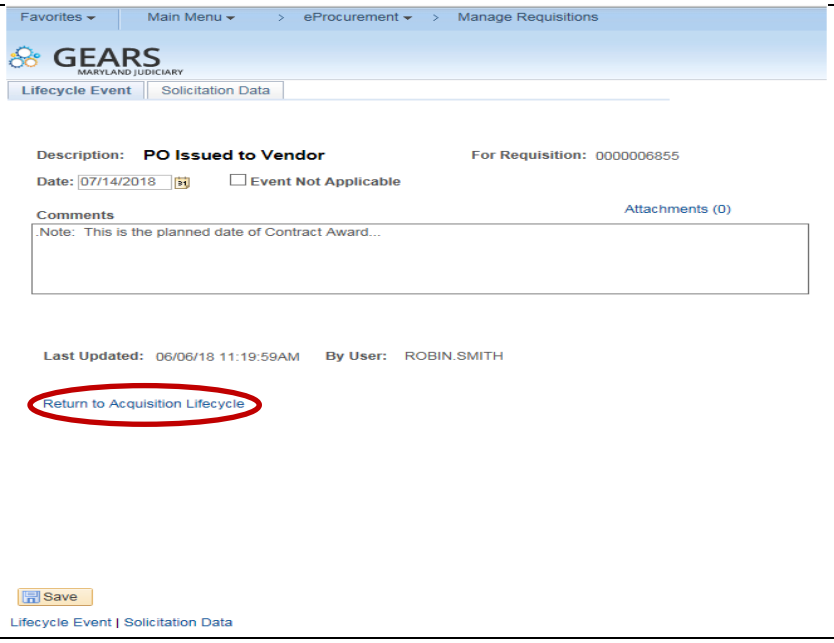
Manage Requisitions

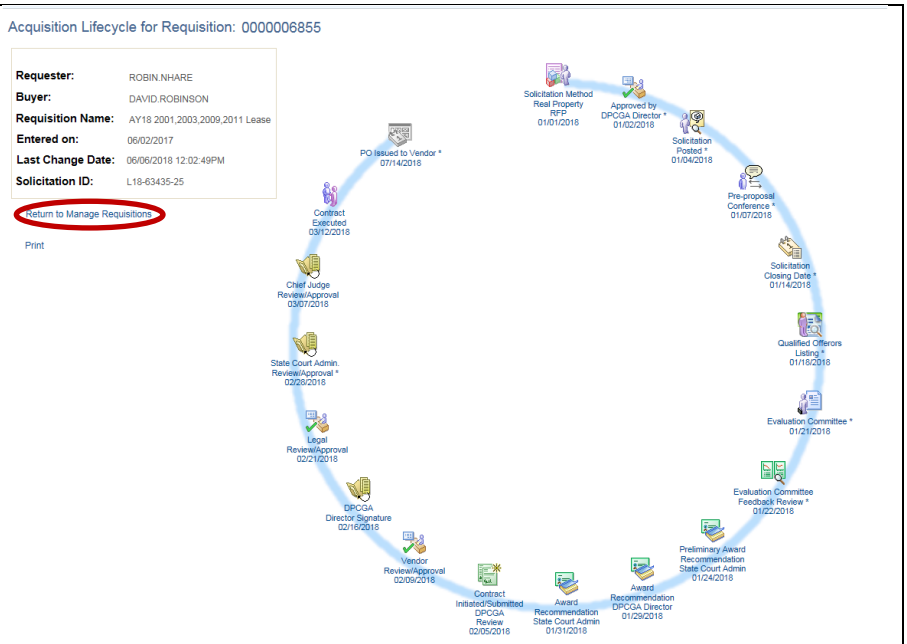
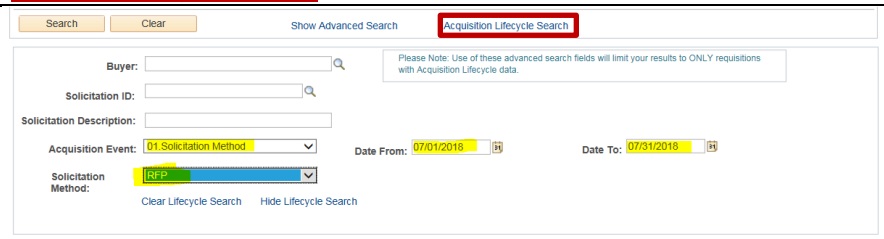
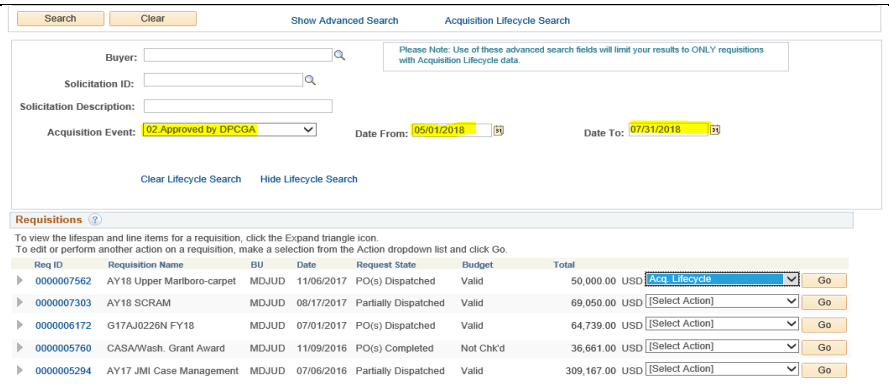


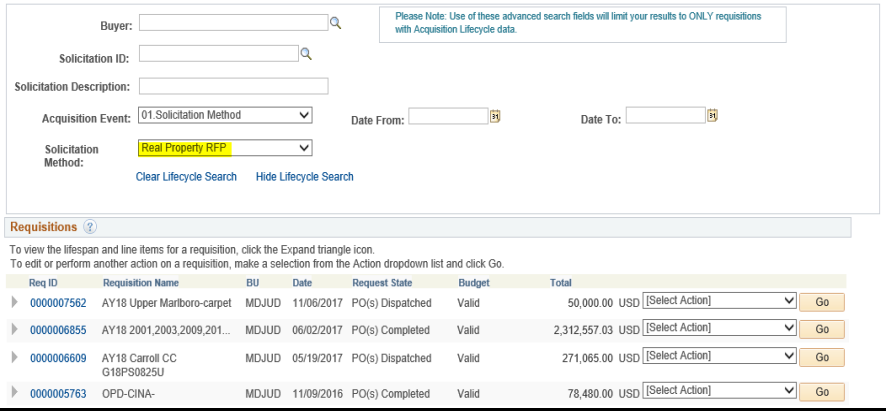
Process

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

STEP	ACTION	DETAILS
1.1	If a specific Requisition ID or other requisition-related information is known (i.e., Requester, Date Range, PO ID, etc.), enter your selection criteria, and then click the 'Search' button.	
1.2	If you'd like to limit your search results to ONLY requisitions which currently have Acquisition Lifecycle data (or if requisition-related information is unknown) click on the Acquisition Lifecycle Search hyperlink.	
1.3	To search by Solicitation Description: Enter a string value (e.g., 'ACP EAST' as shown on the right), and then click the 'Search' button.	Search results will display all requisitions with a lifecycle record containing 'ACP EAST' in the Solicitation Description. In this example, one lifecycle record exists. 
1.4	Click on the pulldown menu for the requisition. Select the 'Acq. Lifecycle' menu item, and then click the 'Go' button.	

1.5	View the Lifecycle for the requisition you selected. Note there are a total of 19 icons shown to the right. In this example, 18 are active and 1 is inactive. 'PO Issued to Vendor' is displayed in greyscale mode. A grey icon indicates the event has not yet been completed, or is not applicable (N/A). **NOTES:** • Icons in greyscale mode associated with a date indicate a future-dated event. *Example*:  • An asterisk * next to an event label indicates the existence of comments and/or attachments related to the event.	
1.6	Click on an icon with an * next to its event label. View the contents of the Comments box and/or click on Attachments (if applicable). • **NOTE**: Non-DPCGA buyers have read-only access to the Lifecycle data. When done, click on the Return to Acquisition Lifecycle hyperlink to return to the Lifecycle page.	

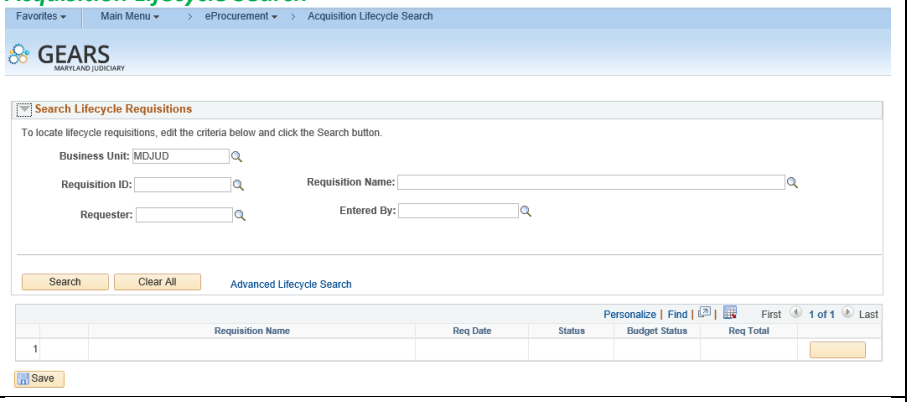
1.7	Click on the Return to Manage Requisitions hyperlink to return to the Manage Requisitions search page.	
	Additional Sample Searches	
1.8	To search by Solicitation Method – 'RFP' and Date Range: Select ***Acquisition Event*** = '01.Solicitation Method', and ***Solicitation Method*** = 'RFP', enter a **Date From/To**, and then click the 'Search" button.	
1.9	Click the Clear Lifecycle Search button to start a new lifecyle search. All existing search selections above are cleared.	
1.10	To search by Acquisition Event and Date Range: Select ***Acquisition Event*** = '02.Approved by DPCGA', enter a **Date From/To**, and then click 'Search'. Next, select a requisition for review. Click on the pull-down menu, select 'Acq Lifecycle', and then click 'Go'.	

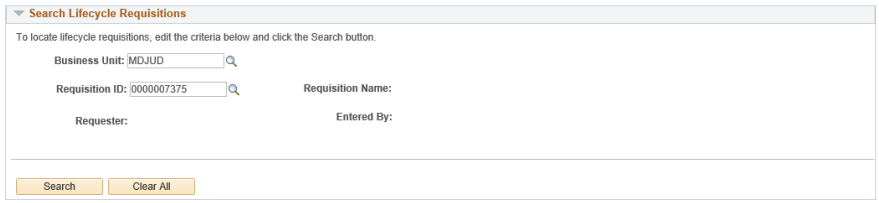
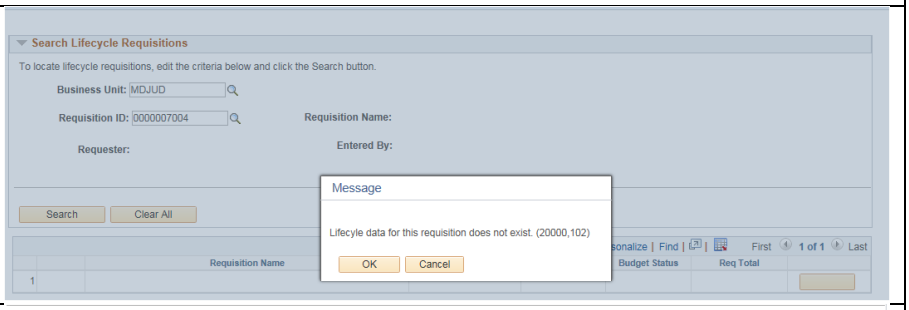
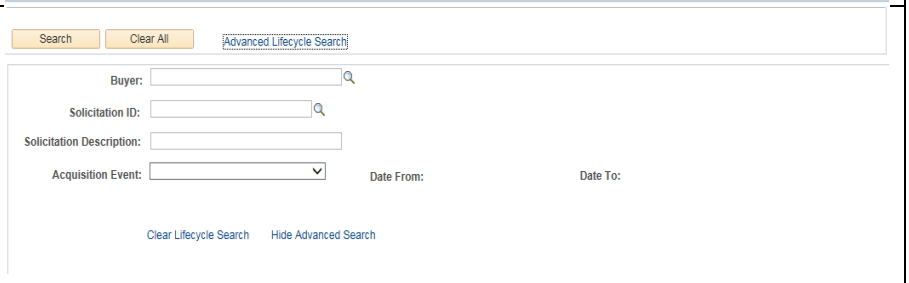
1.11	To search by Solicitation Method - 'Real Property RFP': Select ***Acquisition Event*** ='Solicitation Method', and ***Solicitation Method***: 'Real Property RFP', and then click the 'Search' button.	

Option II:

Navigation:
Main Menu > eProcurement > Acquisition Lifecycle Search

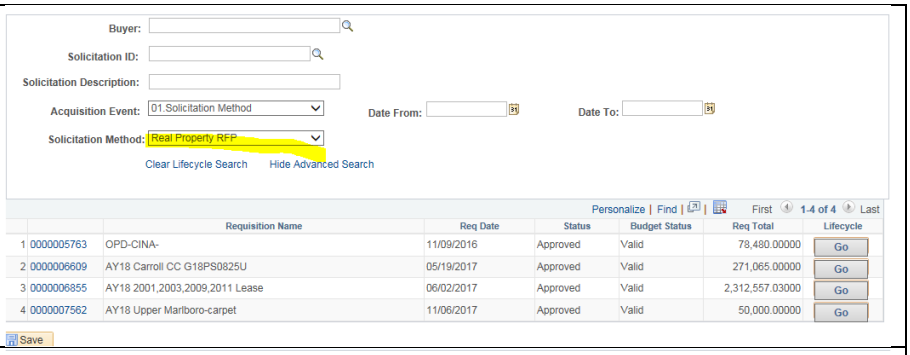
Acquisition Lifecycle Search



2.1	If a specific Requisition ID or other requisition-related information is known (i.e., Requester, Requisition Name, etc.), enter your selection criteria, and then click the 'Search' button.	
2.2	If you select a requisition and it does not already exist in the lifecycle records, the message to the right will be displayed. Click 'Ok' to acknowledge/dismiss the message, and then click 'Clear All' to reset the search.	
2.3	If you'd like to limit your search results to ONLY requisitions which currently have Acquisition Lifecycle data (or if requisition-related information is unknown) click on the Acquisition Lifecycle Search hyperlink. **Note:** The search criteria in the Advanced Lifecycle Search box is the same as found on the Manage Requisitions page. Refer to **Steps 1.3 - 1.6** above.	

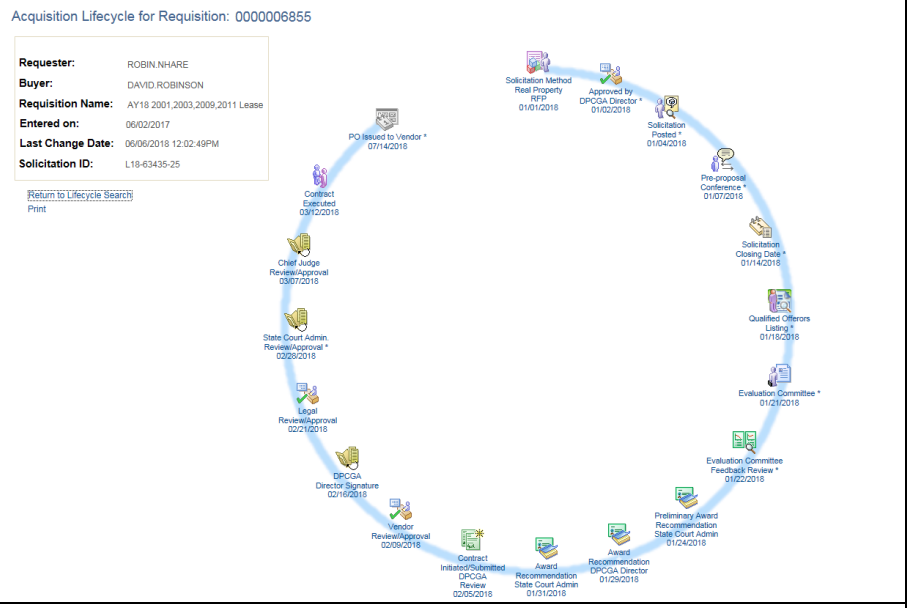
2.4

To Search by Solicitation Method:
Select ***Acquisition Event*** = '01.Solicitation Method' and ***Solicitation Method*** = 'Real Property RFP', and then click the 'Search' button.



2.5

Select a requisition by clicking the 'Go' button. Follow **Steps 1.5-1.6** above.



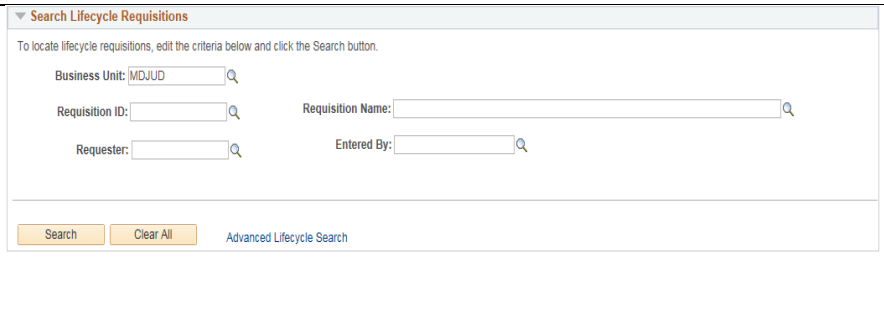
2.6

Click on the Return to Lifecycle Search .

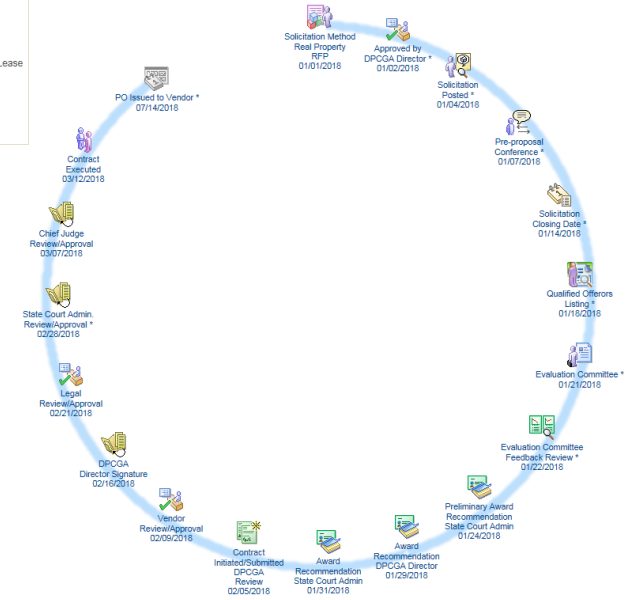
2.7

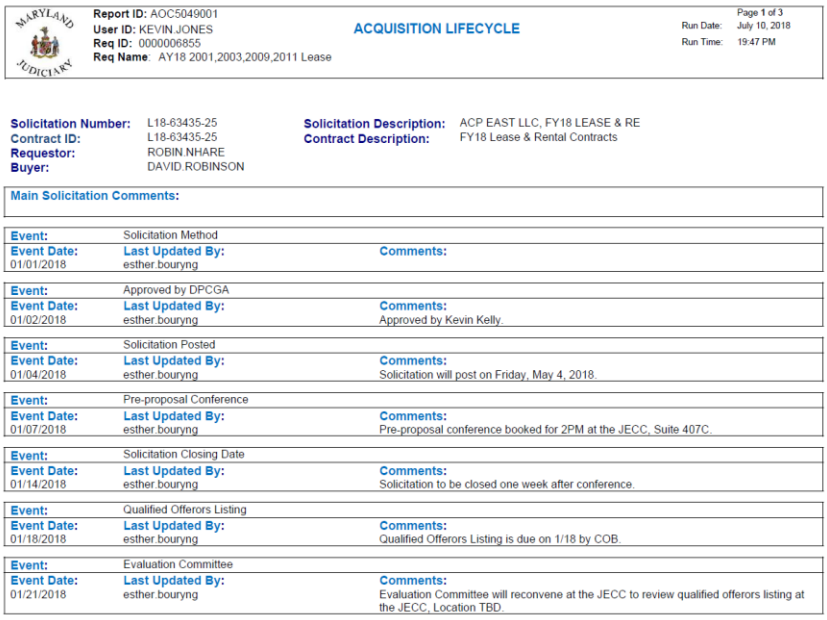
How the Acquisition Lifecycle Search differs from Manage Requisitions:

- The Acquisition Lifecycle Search page enforces access mainly via the chartfield security settings for the user (while Manage Requisitions limits access based on users' individual e-Pro access levels in addition to chartfield security).
- The Acquisition Lifecycle Search page allows the user to select a requisition meeting 'minimum requirements' (see pg 1 for list). However, if the requisition does not exist in the Lifecycle records, a message will appear (see snapshot on the right).



Printing Lifecycle Comments

3.1	From the Lifecycle page, click the 'Print' hyperlink.	**Printing Comments** Acquisition Lifecycle for Requisition: 0000006855 Requester: ROBIN.NHARE Buyer: DAVID.ROBINSON Requisition Name: AY18 2001,2003,2009,2011 Lease Entered on: 06/02/2017 Last Change Date: 06/06/2018 12:02:49PM Solicitation ID: L18-63435-25 Return to Lifecycle Search Print 
3.2	On the Acquisition Lifecycle Print page, users have the option to: • Print all events by selecting its checkbox, or • Select specific events as needed. After making your selections, click the 'Run Report' link.	**Acquisition Lifecycle Print** Acquisition Lifecycle Data Requisition ID: 0000006855 AY18 2001,2003,2009,2011 Lease Events ☐ Print All Events Run Report ☐ Solicitation Method ☐ Solicitation Approved - DPCGA ☐ Solicitation Posted to Website ☐ Pre-proposal Conference ☐ Solicitation Closing Date ☐ Qualified Offerors Listing ☐ Evaluation Committee ☐ Committee Feedback/Review ☐ Prelim. Awd. Recom. St. Court ☐ Award Recommendation - DPCGA ☐ Award Recommendation - State ☐ DPCGA Review ☐ Vendor Review/Approval ☐ DPCGA Director Signature ☐ Legal Review/Approval ☐ State Court Review/Approval ☐ Chief Judge Review/Approval ☐ Contract Executed ☐ PO Issued to Vendor Return to Acquisition Lifecycle

3.3	Once run successfully, the Acquisition Lifecycle report will open as a new page as shown to the right. The report can be printed or saved as a PDF, if needed.	

Report ID: AOC5049001
User ID: KEVIN.JONES
Req ID: 0000006855
Req Name: AY18 2001,2003,2009,2011 Lease

ACQUISITION LIFECYCLE

Page 1 of 3
Run Date: July 10, 2018
Run Time: 19:47 PM

Solicitation Number: L18-63435-25
Contract ID: L18-63435-25
Requestor: ROBIN.NHARE
Buyer: DAVID.ROBINSON

Solicitation Description: ACP EAST LLC, FY18 LEASE & RE
Contract Description: FY18 Lease & Rental Contracts

Main Solicitation Comments:

Event:	Event Date:	Last Updated By:	Comments:
Solicitation Method	01/01/2018	esther.bouryng	
Approved by DPCGA	01/02/2018	esther.bouryng	Approved by Kevin Kelly.
Solicitation Posted	01/04/2018	esther.bouryng	Solicitation will post on Friday, May 4, 2018.
Pre-proposal Conference	01/07/2018	esther.bouryng	Pre-proposal conference booked for 2PM at the JECC, Suite 407C.
Solicitation Closing Date	01/14/2018	esther.bouryng	Solicitation to be closed one week after conference.
Qualified Offerors Listing	01/18/2018	esther.bouryng	Qualified Offerors Listing is due on 1/18 by COB.
Evaluation Committee	01/21/2018	esther.bouryng	Evaluation Committee will reconvene at the JECC to review qualified offerors listing at the JECC, Location TBD.

End of Document