



GEARS

General Enterprise And Resource Support

The GEARS project team in partnership with the Department of Budget and Finance, District Court Headquarters and the Department of Procurement and Contract Administration will be offering training to assist users in understanding processes to successfully perform their jobs. We are offering sessions specific to select audiences, so please be sure to register for the correct session. The time for each session is noted in the training schedule.

To attend training, a person should be an active “user” of the GEARS system and already have a User ID.

General Ledger (GL) and Commitment Control (KK) Entries and Reporting – *Non-District Court* – This session will cover the areas of journal entries and reporting options within both the general ledger and the commitment control modules. Reports and inquiries to be reviewed include the Trial Balance, Budget Status, Budget Overview, and Ledger Inquiry with drilldowns, and the Voucher Activity Inquiry.

Order to Cash Comprehensive Two-day Session – *All* – This session is exclusively for OTC staff that are new to the Judiciary and have not been through the full Order to Cash training in the past. The OTC manual will be used as the guide and will cover all topics of daily and month-end processing. Attendance will be limited to the targeted audience. *****Please bring your OTC manual to class.*****

Order to Cash Refresher – *All* – This session will cover items such as bad check processing, post FAR corrections, AR revenue refunds, end-of-month transactions, local revenue, interest, CCU & P&P adjustments, queries and reports. This will be a good opportunity to ensure that you are following processes and maybe learn new tips from your peers.

Procure to Pay – *District Court* – This session will cover the areas of Procure to Pay, i.e. requisitions, express PO's, receipts and voucher processing, specific to District Court processing.

Procure to Pay – *Non-District Court* – This session will cover the areas of requisitions, express PO's, receipts and voucher processing, as well as the voucher activity inquiry tool. A review of communication from the AOC and reoccurring voucher issues will also be discussed. In addition, the tools and schedule for procurement monitoring will be reviewed. (Please note, there is a separate PTP session for DC staff.)

Purchasing Card – *All* – This session will cover the workflow and process requirements for those users which hold a Judiciary Pcard and/or are responsible for reconciling the Pcard statement monthly.

Supervisory Overview – *Non-District Court* – This session is primarily for those Judiciary staff members who receive approval workflow notices and will include what should be reviewed during the approval process, as well as touch on reporting options.

Travel Policy Review – *All* – This session will review the current Judiciary travel policy, as well as the proper completion of the expense reimbursement form. In addition, common reoccurring issues/errors will be discussed.

*****All training will be held at the Judicial College in the lower level room #10.*****
****Training sessions are subject to cancelation pending enrollment numbers.****
Lunch is provided for full-day sessions.

Please keep in mind that we can accommodate 20 people in each class and the registrations will be processed in the order they are received. You will receive an email confirmation in return.



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FALL 2018 TRAINING REGISTRATION FORM

NAME _____ PHONE # _____

EMAIL _____ OFFICE LOCATION _____

- Please check – I have received approval from my supervisor to attend the specified workshop(s).

Please select training dates from the below:

General Ledger and Commitment Control (*non-DC*) Full Day - November 5

Order to Cash Comprehensive (All) Two-Day Training - November 7 and November 8

Order to Cash Refresher (All) ½ Day AM - November 9

Procure to Pay (*DC*) ½ Day AM - November 1

Procure to Pay (*others/non-DC*) Full Day - October 31

Purchasing Card (All *Pcard holders or Proxies*) ½ Day AM - November 15

Supervisory (*non-DC workflow Aprovers*) ½ Day PM - November 16

Travel Policy Review (All) ½ Day AM - November 16

PLEASE COMPLETE THIS FORM IN ITS ENTIRETY AND FAX TO GEARS at 410-260-1290.

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