

GEARS Update 10.19.17

All:

The GEARS team would like to make all of our users aware of the following announcements.

GENERAL:

Close Dates – Below are the close dates for the remainder of FY18. Please be sure to have your documents and end-of-month processing complete by the last date noted for each month. With periods being closed, the system will now provide date messages that may prevent saving of your document. Please note that there is a Tip Sheet titled, “What to do if you get a closed period message”, on the GEARS site under the “general” heading.

<u>MONTH</u>	<u>LAST POSTING DATE</u>
July	September 18
August	September 18
September	October 16
October	November 15
November	December 15
December	January 16
January	February 15
February	March 15
March	April 16
April	May 15
May	June 15
June	Please follow deadlines that will be published in the year-end schedule.

GEARS Training – Please watch for the training schedule to be published shortly. The demand for classes has greatly decreased over the past couple years. Therefore, we will work to fill each scheduled class before adding others, so please schedule your registration as needed as soon as possible.

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

ORDER TO CASH:

Local Revenue Query – There have been a few recent inquiries as to how to retrieve data on local revenue payments. There is a query already in production named AOC_Local_Revenue_By_Customer that can be run by Business Unit, date range and customer number, which will include detailed payment information with the voucher and check number as well.

PROCURE TO PAY:

Attachments/Comments – In an effort to further restrict the addition/deletion capabilities of attachments and comments, the GEARS Team has implemented tighter security based on user roles and document statuses. Please review the related document on our site:

<http://mdcourts.gov/gears/tipsheets92/ptp/general/92additiondeletionattachments.pdf>

Interpreter Invoice Review – Please review this new document for detailed information on How to Review/Reopen Interpreter Invoices (link provided below). In the past, there have been many invoices that have been partially started, denied or abandoned in an unfinished status. This clean-up review should be done on a regular basis.

<http://mdcourts.gov/gears/tipsheets92/ptp/vouchers/92viewingreopeninginterpreterinvoice.pdf>

Vendor Maintenance Form – Just a quick reminder, in order for your request to be processed timely, please ensure appropriate documentation is attached, such as the invoice, expense form, and/or W-9. It would also be appreciated if you could insert the vendor name as the subject of the email when sending the form in.

Any questions about any of the above, please be sure to let me or the GEARS Team know.

Thank you,
Tammy

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