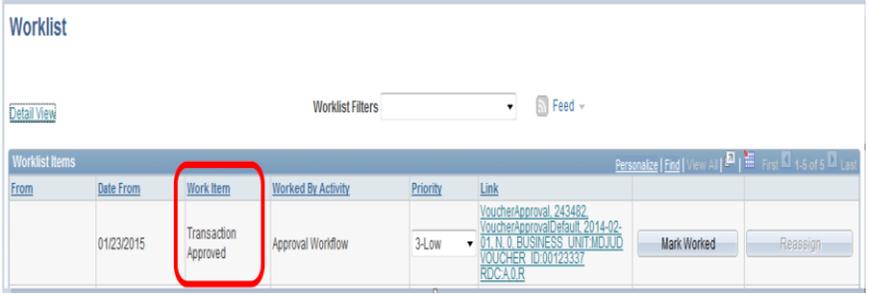


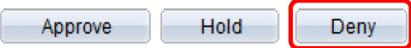
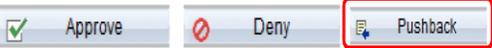
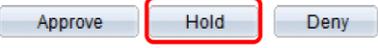
LAST REVISED DATE: 03/01/2016

General Information

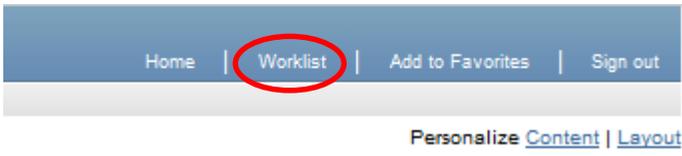
Task	Process Information
<p>Understanding Workflow and Using the Worklist</p>	<p>Workflow provides a means to automatically enforce business authorization processes so that they can be applied throughout the Maryland Judiciary. When you submit a transaction for approval, the action triggers workflow notifications to inform the designated recipient(s) to take appropriate action (approve, deny, or push-back the transaction as an approver). These notifications trigger emails and new action items in the approver’s GEARs Worklist. GEARs captures and maintains the date, time, user ID and nature of the event that takes place each time someone completes a workflow action.</p> <p>When there is work that requires your approval or there is a notification that something has occurred, an automatic communication puts the items in your Worklist.</p> <p>A link to your Worklist appears at the top of each page to alert you to any outstanding workflow items that require your attention. From the Worklist, you can access item details, complete the required actions, and mark the items complete.</p> <p>Although the majority of these Worklist items generate an email notification, it is a good idea to get in the habit of checking your Worklist regularly.</p>

Things to Know About Core Workflow Functionality and Concepts that have been implemented in GEARs to date.

<p>Approve</p> <p><input type="button" value="Approve"/> <input type="button" value="Hold"/> <input type="button" value="Deny"/></p> <p>NOTE: Please refer to the Approval Levels and Dollar Thresholds document for more information about the Judiciary’s approval levels for each type of transaction.</p>	 <p>Approval action routes an email and Worklist item notification back to the originator of the transaction (after all approvers have approved). Examples follow:</p> <ol style="list-style-type: none"> 1. Requisition routes back to the Requestor. 2. PO/Express PO routes back to the Field/Procurement buyer (PO originator). NOTE: The Field Buyer also receives a notice when a PO has been dispatched by Procurement. 3. Voucher routes to its originator.
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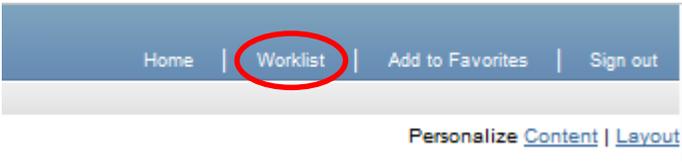
<p>Deny</p> 	<p>Denial action stops the workflow and routes an email and Worklist item notification to the originator of the transaction. Examples follow:</p> <ol style="list-style-type: none"> 1. Requisition routes back to the Requestor. Requisitions, once denied, can be corrected by editing the Requisition to make corrections and to be resubmitted. If it is decided that the order will not be placed, the Req will need to be cancelled. 2. PO/Express PO routes to the Field/Procurement buyer (PO originator). POs, once denied, can be corrected by pulling up the existing PO to make corrections and to be resubmitted. If it is decided that the order will not be placed, the PO will need to be cancelled. 3. Voucher routes to its originator. Vouchers, once denied, can be corrected by editing the Voucher to make corrections and to be resubmitted. If it is decided that the voucher is no longer needed, the voucher will need to be either deleted or closed. Please contact Accounts Payable, in the Department of Budget and Finance.
<p>Push-back</p> 	<p>An approver can Push-back the transaction to the previous approval step. The purpose of a Push-Back is to question the prior step's approval and/or to request clarification. Push-Back only applies when a transaction has been approved by at least one person (when there is a predecessor approval step).</p> <p>When a Push-Back has been received (by the previous approver), he/she must take appropriate action (e.g., update the transaction, provide justification, attach additional documentation, etc.), prior to approving the transaction again or denying the transaction.</p>
<p>Hold</p> 	<p>PO approvers can use the Hold action to prevent the approval process from progressing to the next approval step until the approver takes action on the purchase order. The approval 'hold' action is removed when the approver moves it forward by doing any of the following: Update the PO to restart the approval process, Approve, or Deny. While the "hold" is still a viable option, we caution users in utilizing this selection. As mentioned, no further action happens on the document until the approver moves forward with action. Therefore, the user must remember that the document was placed on hold and take required action.</p>
<p>Comments</p>	 <p>Comments may be inserted when performing an Approval (and in some cases, when submitting for approval) and can be viewed by users that have security access to view the transactions. Comments are required for a Deny, Hold, or Push-Back.</p>

GEARS Navigation

<p>You can find your Worklist in the upper right hand corner of your GEARS (PeopleSoft Financials) Screen.</p>	
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1.0 Process

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

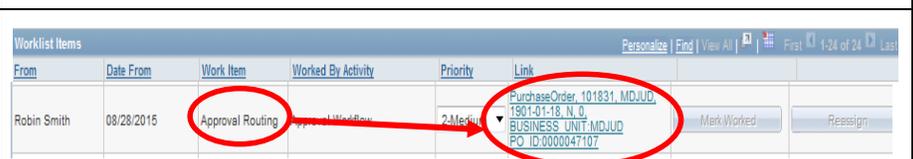
STEP	ACTION	DETAILS																																																																
1.	Click the "Worklist" link.																																																																	
2.	Use the Worklist page to view, assign priority to, and process Worklist items.	<p>Worklist Worklist for GISELABLADES: Gisela Blades</p> <p>Detail View Worklist Filters <input type="text"/> Feed </p> <table border="1" data-bbox="657 1113 1539 1570"> <thead> <tr> <th>From</th> <th>Date From</th> <th>Work Item</th> <th>Worked By Activity</th> <th>Priority</th> <th>Link</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Kevin Jones</td> <td>08/20/2014</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder_57782.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000034029</td> <td>Mark Worked</td> <td>Reassign</td> </tr> <tr> <td>Kevin Jones</td> <td>08/28/2014</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder_58831.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000034029R</td> <td>Mark Worked</td> <td>Reassign</td> </tr> <tr> <td>Lisa Peters</td> <td>12/15/2014</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder_72381.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:R000031901</td> <td>Mark Worked</td> <td>Reassign</td> </tr> <tr> <td>Kevin Jones</td> <td>08/30/2015</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder_86747.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000052823</td> <td>Mark Worked</td> <td>Reassign</td> </tr> <tr> <td>Kevin Jones</td> <td>08/26/2015</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder_101261.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000032873</td> <td>Mark Worked</td> <td>Reassign</td> </tr> <tr> <td>Kelly Moore</td> <td>07/29/2013</td> <td>Approval Routing</td> <td>Approval Workflow</td> <td>2-Medium</td> <td>PurchaseOrder_1251.MDJUD, 1901-01-16, N, 0, BUSINESS UNIT.MDJUD PO ID:000034028</td> <td>Mark Worked</td> <td>Reassign</td> </tr> </tbody> </table> <table border="1" data-bbox="657 1606 1539 1955"> <tr> <td>Worklist Filters</td> <td>Worklist Filters is a way to filter (limit) your displayed items to a specific type of work item like "Approval Routing" or "Transaction Approved".</td> </tr> <tr> <td>From</td> <td>Displays the individual who triggered the work item.</td> </tr> <tr> <td>Date From</td> <td>Displays the date when the work item was triggered.</td> </tr> <tr> <td>Work Item</td> <td>Displays the type of work: (1) Transaction Approved or (2) Approval Routing. Transaction Approved means that the transaction was approved by someone else in your group and you are being notified that the transaction has been approved. Approval Routing means that an approval is required for the transaction.</td> </tr> </table>	From	Date From	Work Item	Worked By Activity	Priority	Link			Kevin Jones	08/20/2014	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder_57782.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000034029	Mark Worked	Reassign	Kevin Jones	08/28/2014	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder_58831.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000034029R	Mark Worked	Reassign	Lisa Peters	12/15/2014	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder_72381.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:R000031901	Mark Worked	Reassign	Kevin Jones	08/30/2015	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder_86747.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000052823	Mark Worked	Reassign	Kevin Jones	08/26/2015	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder_101261.MDJUD, 1901-01-18, N, 0, BUSINESS UNIT.MDJUD PO ID:000032873	Mark Worked	Reassign	Kelly Moore	07/29/2013	Approval Routing	Approval Workflow	2-Medium	PurchaseOrder_1251.MDJUD, 1901-01-16, N, 0, BUSINESS UNIT.MDJUD PO ID:000034028	Mark Worked	Reassign	Worklist Filters	Worklist Filters is a way to filter (limit) your displayed items to a specific type of work item like "Approval Routing" or "Transaction Approved" .	From	Displays the individual who triggered the work item.	Date From	Displays the date when the work item was triggered.	Work Item	Displays the type of work: (1) Transaction Approved or (2) Approval Routing . Transaction Approved means that the transaction was approved by someone else in your group and you are being notified that the transaction has been approved. Approval Routing means that an approval is required for the transaction.
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			NOTE: the type of work items will depend on your role.
		Worked By Activity	Displays the action that generated the workflow item, such as Approval Workflow .
		Priority	Work Item defaults to (1- High, 2- Medium, 3- Low) priority. NOTE: Priority setting defaults are displayed on a user's Worklist. The priority setting can be changed by the user for his/her own use in filtering and (will only impact this user's Worklist). This user's updated priority setting does not move to the next approver/reviewer in the Workflow chain (he/she will see the system default priority setting on the WL page).
		Link	Click a link in this column to access the target page—the page where you work on the item. The target page is specific to the type of activity that you perform. For example, if the action is Purchase Order Approval, the link accesses the Purchase Order Approval page, where you can view information about the purchase order. NOTE: If the color of the link is PURPLE , you have utilized the link and gone into the transaction, but did not complete the required action. If the color of the link is BLUE , the transaction is new and has not been accessed before.
		Marked Worked	Click this button to mark an item as worked if you/ or another approver have already performed the necessary actions. This indicates that no immediate system actions are required and simply removes the item from your worklist.

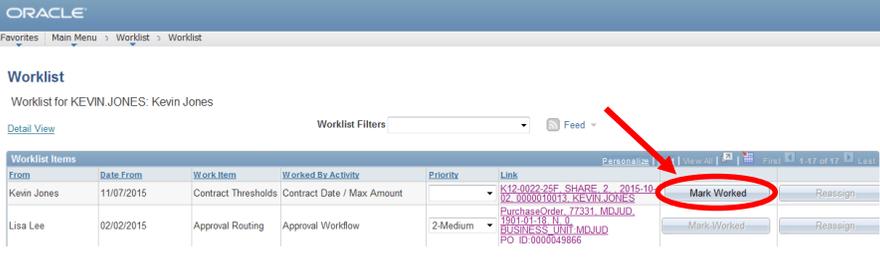
NOTE: You can use the grid features to order (sort) columns

3. **If the work item requires approval, the Work Item column will contain "Approval Routing". Click on the link to access the Approval page.**

In this example, a purchase order is used to demonstrate the approval work item steps.



<p>3b.</p> <p>The Approval page displays the transaction that requires your approval including item details such as status, amounts, dates, and line details.</p> <p>NOTE: The approval pages will correspond with the type of transaction (e.g., purchase orders, requisitions, vouchers, etc.) to be approved. In this example, a Purchase Order required approval; therefore, the Purchase Order Approval page is displayed.</p> <p>You can Approve, Hold or Deny the transaction (See the “Workflow Concepts” section for further details).</p> <p>Once you take action on the item, it will automatically be removed from your Worklist.</p>	<p>Purchase Order Approval</p> <p>Business Unit: MDJUD PO ID: 000047107 View Printable Version PO Total: 24,000.00 USD Vendor ID: 000010303 MANSFIELD OIL COMPANY Buyer: ROBIN.SMITH PO Reference: Req. 1607</p> <p>PO Status: Compl PO Date: 08/05/2014 Budget Status: Valid Justification: No justification entered by buyer.</p> <p>Edit PO</p> <p>Review Lines</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Line</th> <th>Item Description</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Merchandise Amount</th> <th>Currency</th> <th>View Req Approvals</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>1</td> <td>Fuel purchase on all AOC Fleet vehicles Covered Period 07/01/14 to 06/30/15</td> <td>1.0000</td> <td>MMO</td> <td>24,000.00000</td> <td>24,000.00</td> <td>USD</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Select All / De-select All View Lines Details</p> <p>Review / Edit Approvers</p> <p>Procurement PO Approval</p> <p>Purchase Order 000047107: Pending View/Hide Comments Start New Path</p> <p>Procurement PO Approval</p> <p>Pending</p> <p>Multiple Approvers + PO AOC Approver +</p> <p>Comment History</p> <p>Approval Comments</p> <p>Approve Hold Deny</p> <p>Return to Worklist Approval History</p>	Select	Line	Item Description	Quantity	UOM	Price	Merchandise Amount	Currency	View Req Approvals	<input type="checkbox"/>	1	Fuel purchase on all AOC Fleet vehicles Covered Period 07/01/14 to 06/30/15	1.0000	MMO	24,000.00000	24,000.00	USD	<input checked="" type="checkbox"/>			
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<p>4.</p> <p>To view the notifications for transactions that have already been approved (by you or another approver), select an item where the Work Item column is “Transaction Approved”, and click on the Link.</p>	<p>Worklist Items</p> <table border="1"> <thead> <tr> <th>From</th> <th>Date From</th> <th>Work Item</th> <th>Worked By Activity</th> <th>Priority</th> <th>Link</th> <th></th> </tr> </thead> <tbody> <tr> <td>Kevin Jones</td> <td>08/20/2014</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder, 57782, MDJUD, 1901-01-18, N.O, BUSINESS UNIT:MDJUD, PO ID:000057782</td> <td>Mark Worked Reassign</td> </tr> <tr> <td>Kevin Jones</td> <td>08/28/2014</td> <td>Transaction Approved</td> <td>Approval Workflow</td> <td>3-Low</td> <td>PurchaseOrder, 58831, MDJUD, 1901-01-18, N.O, BUSINESS UNIT:MDJUD, PO ID:000034029R</td> <td>Mark Worked Reassign</td> </tr> </tbody> </table>	From	Date From	Work Item	Worked By Activity	Priority	Link		Kevin Jones	08/20/2014	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder, 57782, MDJUD, 1901-01-18, N.O, BUSINESS UNIT:MDJUD, PO ID:000057782	Mark Worked Reassign	Kevin Jones	08/28/2014	Transaction Approved	Approval Workflow	3-Low	PurchaseOrder, 58831, MDJUD, 1901-01-18, N.O, BUSINESS UNIT:MDJUD, PO ID:000034029R	Mark Worked Reassign
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<p>4b.</p> <p>The View Approvals page displays the transaction details including approval status, approvers, transaction status, amounts, dates, and line details.</p> <p>NOTE: Click on the arrows to see the approvers and line details.</p>	<p>View Approvals</p> <p>Business Unit: MDJUD PO ID: 000034029R View Printable Version PO Total: 18,424.00 USD Vendor ID: 000000206 SAMPERK SOFTWARE INC Buyer: GISELA.BLADES PO Reference: IT SERVICES replaces 34029</p> <p>PO Status: Compl PO Date: 08/28/2014 Budget Status: Valid Justification: No justification entered by buyer.</p> <p>Edit PO</p> <p>View Lines</p> <p>Review / Edit Approvers</p> <p>Procurement PO Approval</p> <p>Purchase Order 000034029R:Approved View/Hide Comments</p> <p>Return to Worklist</p>																					

5	<p><u>If a transaction has already been worked by another approver, mark the worklist item as worked, by clicking the “Mark Worked” button to remove it from your worklist.</u></p>	 <p>The screenshot shows the Oracle Worklist interface for user KEVIN.JONES. It features a table with columns: From, Date From, Work Item, Worked By Activity, Priority, and Link. Two items are listed: one for Kevin Jones (dated 11/07/2015) and one for Lisa Lee (dated 02/02/2015). The 'Mark Worked' button for the Kevin Jones item is circled in red, with a red arrow pointing to it from the text in the adjacent column.</p>
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 **Important**

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer the appropriate User Procedures and/or online references for any corresponding policies regarding this process.