Accounting Day Inquiries and Responses:

1. Can the Ship To locations be changed?

   Your default Ship To Location is included in the setup of your GEARS User Preferences. Please contact the Help Desk to request that your default be changed.

2. Can there be a user list?

   A lotus GEARS Notification email group has been established for use by the Project Team. This email account will be used for training announcements, system issues and other related topics of interest.

3. Can SharePoint become the portal for entry and can documents be stored there?

   At this point, not everyone has access to SharePoint, so it cannot be used for our central repository. The GEARS website will be used for user related documents and information

4. Can Pcard charges be allocated to land records?

   Each Pcard has a default PCA associated with the card. Unfortunately, it can only be one PCA and therefore, the general fund PCA is used. However, when Pcard transactions are reviewed in GEARS, you will be able to charge the transaction(s) to land records. Pcard holders will begin their online GEARS review of charges in February.

5. When will the Order to Cash (OTC) documents for Standalone registers be complete?

   Documentation for Standalone registers will be done before any further standalone implementations are completed. The roll-out schedule is still under review.

6. The coloring on the Newsletters makes it difficult to print and read.

   This will be noted for any future Newsletters. For the immediate future, we plan to distribute weekly email updates, rather than the newsletter.

7. Can the FAQ's and Acronyms be updated on the website?

   Both items are being worked on now and should be updated soon.

8. When is a PO required?

   If the amount of your order is less than $2500 (or less than $500 for District Court), and the goods/services are NOT covered by a Judiciary Blanket Purchase Order/Contract, you may create an Express Purchase order, although it is NOT required. You can just voucher the invoice directly for payment. There is a tip sheet available for Creating an Express Purchase Order.

If the amount of your order is for $2500 or more (or $500 or more for District Court), and the goods/services are NOT covered by a Blanket Purchase Order, you will need to create an eProcurement Requisition so the Purchasing Department (DPCA) can source the Requisition to a Purchase Order. There is a tip sheet available for Creating an eProcurement Requisition.

Finally, if in the past you required a Purchase Order from the Purchasing Department (DPCA) for similar goods/services regardless of price, you will need to create an eProcurement Requisition so the Purchasing Department (DPCA) can source the Requisition to a Purchase Order. There is a tip sheet available for Creating an eProcurement Requisition.

9. What is the process for vendors?

   When the need for a vendor in GEARS has been determined, a user should Review Vendors to determine if the vendor exists or not. If the vendor is new or any changes are required, then the Vendor Maintenance form needs to be completed. The form can be found on the GEARS site.

10. Please provide details on workflow and the difference between pushback and denial.

    Please see the document attached to this email titled Workflow Concept Overview.

11. What is happening with closed receipts?

    Please file a help desk ticket if you have an issue with a closed receipt.

12. Pop-up issue on Budget Check

    This may be a security issue. Please try resolving by holding the CTRL key down and click on the icon. If issues remain, please file a help desk ticket for assistance.

13. Would like better communication on changes.

    We will begin to send out regular GEARS update emails to the GEARS Notification Lotus group.

14. What is the purpose of SME's?

The purpose of SME's is to assist their fellow co-workers, as well as the project team. These activities will include testing, project documentation review, peer-to-peer assistance and other issues. If you are interested, please let Tammy Sitar know.

15. What is the purpose of the Change Control Board, who, what, when?

    The Change Control Board will review enhancement requests to determine feasibility, dependencies and relationships between functional areas, future project release issues, etc. The Board will be officially formed when the project has entered its on-going maintenance phase.

16. There is not enough information on the Quick Tips.

    All of the Quick Tip Sheets were reviewed prior to Accounting Day. We will continue to evaluate content and needs as we move forward. However, if you have suggestions for language and/or content updates please propose a solution and send it to us for review

17. Please post the Visio diagrams on the website and SharePoint.

    The flowchart diagrams can be found on our GEARS website.

18. Would like a CC reporting session.

    The project team is finishing some queries and reporting that have been identified. When done, we will publish this to all courts and then bring people in to identify any additional needs.

19. Would like training sessions planned.

    The plan for on-going training is still being developed. However, the project team has planned work sessions, as well as a few training sessions in the months of January through March.

20. Would like notice on enhancements.

    Changes, including enhancements, should be identified in the GEARS email updates.

21. Can there be notification when PO's are issued?

    As delivered, the system does not send notification to the requestors of PO issuance. This has been identified as a possible enhancement. The Department of Procurement and Contract Administration is currently using the Notify option to manually do this notification.

22. How to locate the buyer on a requisition?

    Please see the document attached to this email titled How to Find the Buyer Assigned to your Requisition.

23. The "view printable" option does not always work.

    Please complete a help desk ticket when this occurs.

24. What happens when a requisition is denied?

    Please see the document attached to this email titled Workflow Concept Overview.

25. How to find the associated PO and receipts on a voucher?

    Please see the document attached to this email titled How to Find the Associated PO and Receipts on a Voucher.

26. The security form needs to be revised.

    We understand that the form is not very user-friendly and are currently working with JIS Security to revise the form.

27. How do we know the roles to assign to our staff?

    The current listing of roles and a brief description of the access provided is on the Tip Sheets web page under "Security."

28. How do we review the attachment on a voucher?

    Please see the document attached to this email titled How to Review a Voucher and View Attachment.