

GEARS Access Form Instructions

(Unless specified, all user account requests will be created in the Production database environment.)

1. Please indicate the type of request –
 - a. New – User does not currently have an ID for GEARS
 - b. Modification – User needs functions added/removed/changed for their established user ID
 - c. Inactivate – User no longer requires the GEARS user account for their position or has left Judiciary employment.
 - d. Change Name – User wishes to have their name changed in GEARS.
 - e. Transfer – User is still employed with the Judiciary, but has changed work location.
2. Legal Name of User – Please enter your legal given name.
3. Other Names Known As – Enter any other name that you go by, such as Beth for Elizabeth. This will assist in ensuring duplicate ID's are not created.
4. Work Email – Enter your work email address. This email address is used to send workflow notifications.
5. Requestor Phone Number – Please enter the phone number for the person completing this form.
6. Work Location – Please enter your work location, such as AOC Department of Budget and Finance, AA County Circuit Court. If you work at more than one, please list all locations.
7. Position Title – Please enter the exact position title of the User ID requested, such as Accounting Supervisor.
8. Current User ID (if applicable) – If the request involves a change, please enter the current User ID, such as JOE.GEARSMAN.
9. For all of the Add/Remove Selections, simply consider what functions the User will need to perform their job and select the appropriate add boxes (if a new user or modification) or select remove if appropriate for a current user. Please note the following as it relates to these selections:
 - a. There are specific functional roles listed under restricted use areas for only staff members of certain departments, such as Department of Budget and Finance, and Department of Procurement.
 - b. If you have a user that may not be responsible for directly processing information but may need to run reports for informational purposes, please use the Reports Only selection area.
 - c. If the request is for the User to be a proxy for someone's Pcard that cardholder's name must be specified.
 - d. If a user will be part of the workflow approval for your area, select the appropriate items for express PO's, requisitions or invoices. A selection of one of these roles will trigger workflow notifications and worklist assignments to the user.
 - e. Most of the roles under the "Other" category are restricted for staff of certain areas, such as Internal Audit, MBE Office, and Warehouses.
10. The Additional Roles area may be used to identify any functional job needs that you are not able to identify with any of the stated roles. This is also where information for non-production users, such as GEARS Team member, Tester, or Trainer can be specified.

11. User Sign – This should be the signature of the User request. This signature may not always be possible with inactivation requests.
12. Date of Request – Enter date the request is completed.
13. Supervisor Sign, Date, Insert Name and Title – Please complete the fields as specified.
14. The form must be completed and approved and then scanned and sent via email as instructed at the top of each form.
15. Once approved by AOC or DCHQ, the GEARS project team will send an email when the request has been completed.