MARYLAND JUDICIARY

GEARS General Enterprise And Resource Support

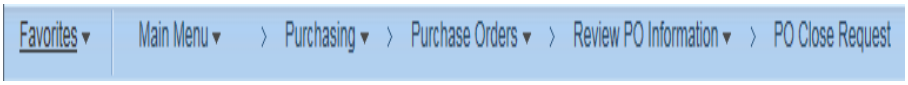
Quick Reference Tip Sheet

NEW: 05/01/2017

General Information

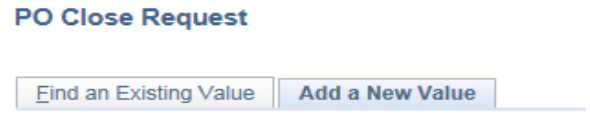
Task	Process Information
Using the PO Close Request Page **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	The PO Close Request page was customized for GEARS Field Users to assist in the PO Close Request process. Use the PO Close Request page to select POs that have 'Dispatched' status and that are eligible to be closed. The process will automatically send a notification to Procurement. Procurement will then close the requested POs and any associated Requisitions.

GEARS Navigation

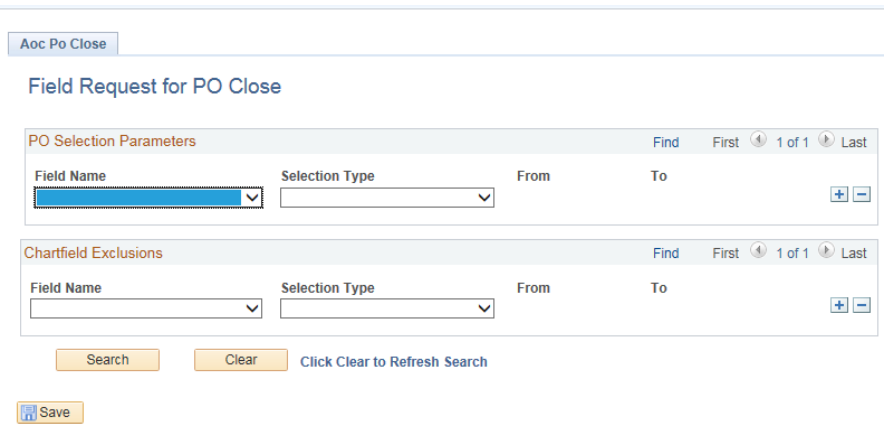
Purchasing > Purchase Orders > Review PO Information > PO Close Request	

1.0 Process

This document is intended to provide a quick reference to using the PO Close Request Page within GEARS.

STEP	ACTION	DETAILS
1.	**Create the Run Control ID. The first time you run the PO Close Request, you must create a new Run Control ID. Click on the** Add a New Value **tab.** **NOTE: A Run Control ID is the name that will be given to the saved parameters you select for the report. You can run the same report again in the future by selecting the same Run Control ID when using the Find an Existing Value tab. No spaces are allowed in the Run Control ID. In addition, the report parameters for a Run Control ID can also be changed after selecting the ID.**	 To use a Run Control ID that you previously created, click the Find an Existing Value tab, and then click the Search button. A list of Run Control IDs appears.
2.	**Click the** Add **button.**	

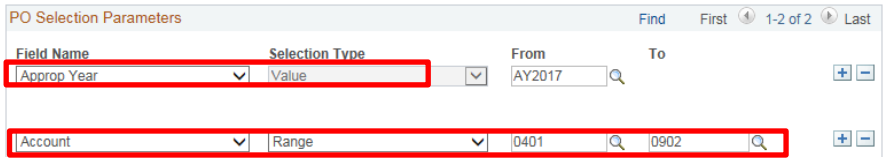
3. **The PO Close Request run control page displays.**



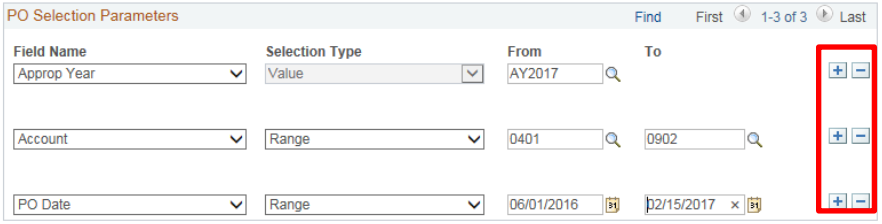
4a. **<u>Specify the PO Selection Parameters</u>. Select the Field Name criteria for your PO selection and select either a specific Value or a Range of Values for the field.**

You can select any single or combination of the following fields: Account, Appropriation Year, Account Encumbrance Indicator, Fund, PO Date, PO Number, Program Cost Account (PCA), Project, Vendor ID, or Vendor Name.

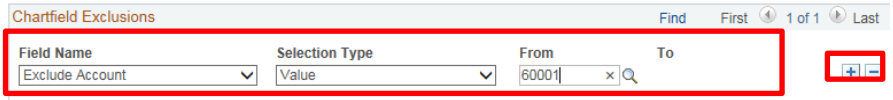
NOTE: The more selection criteria entered, the more granular your results will be.



You can select multiple field names. Add/delete field names as needed by using the "**+**" and "**-** "buttons to the right of the line.



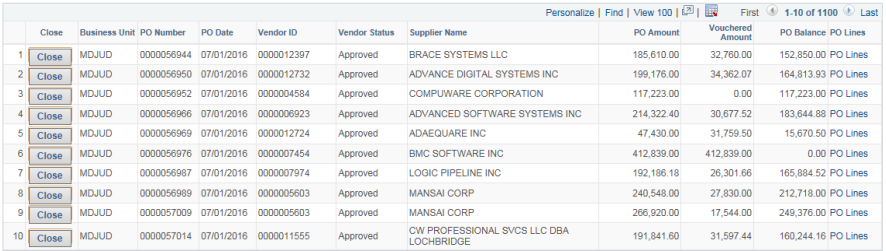
4b. **You can exclude any single or combination of the following ChartFields:** Exclude Account, Exclude Fund, Exclude PCA, Exclude Program, Exclude Project, Exclude Zero Balance POs.

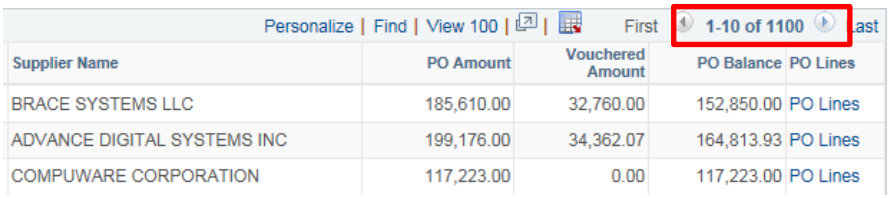
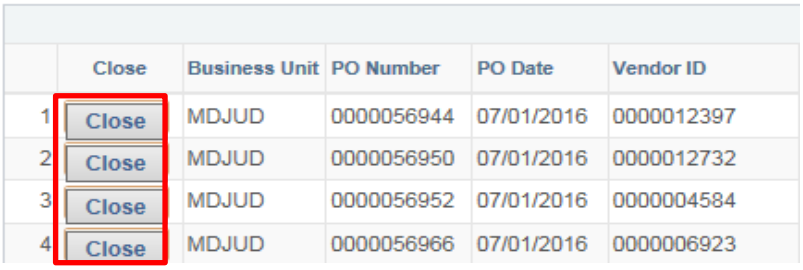
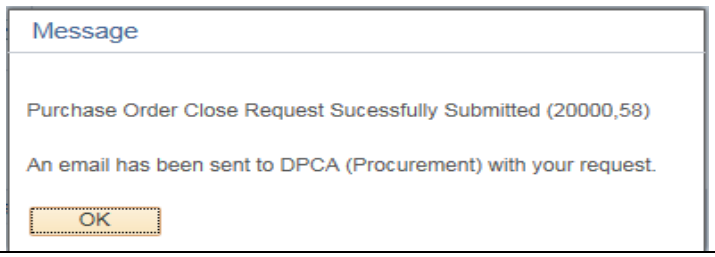


NOTE: You can select multiple field names. Add/delete field names as needed by using the "+" and "-"buttons to the right of the line.

5. **Click the** Search **button.**

6. **The results from the PO selection criteria display the following fields:** PO Number, PO Date, Vendor ID, Vendor Status, Vendor Name, PO Amount, Vouchered Amount, PO Balance, and there is a link to view PO Lines.



	NOTE: If there were no results from the PO selection criteria, the system will return the message, " * No Records Found *** ".**	**The page displays up to 10 POs at a time. If you have more than 10 POs as a result of your search, view additional POs as needed by using the left and right arrow buttons to the top right of the grid.**  Personalize | Find | View 100 | First 1-10 of 1100 Last Supplier Name / PO Amount / Vouchered Amount / PO Balance / PO Lines BRACE SYSTEMS LLC 185,610.00 32,760.00 152,850.00 PO Lines ADVANCE DIGITAL SYSTEMS INC 199,176.00 34,362.07 164,813.93 PO Lines COMPUWARE CORPORATION 117,223.00 0.00 117,223.00 PO Lines
7.	**Select POs to be Closed. Click the Close button next to the PO(s) that you request to be closed.** **As you click Close, the Close button grays out which indicates the POs you are selecting to be closed.** **NOTE: If all POs listed should be closed, you can click the Select All button to process all POs listed.**	 Close / Business Unit / PO Number / PO Date / Vendor ID 1 Close MDJUD 0000056944 07/01/2016 0000012397 2 Close MDJUD 0000056950 07/01/2016 0000012732 3 Close MDJUD 0000056952 07/01/2016 0000004584 4 Close MDJUD 0000056966 07/01/2016 0000006923
8.	**Process PO Close Requests. Click the Process PO Close Requests button.**	
9.	**The PO Close Request Confirmation page displays the list of POs you selected to be closed.** **NOTE: Review this list for accuracy. If you would like to make changes to the list, click the Cancel button to reset all selections or click the Return button to add to your existing selections.**	 Please confirm you wish to close the following PO's Personalize | Find | First 1-3 of 3 Last Business Unit / PO Number / PO Date / Vendor ID / Vendor Status / Supplier Name / PO Amount / Vouchered Amount / PO Balance 1 MDJUD 0000056944 07/01/2016 0000012397 Approved BRACE SYSTEMS LLC 185,610.00 32,760.00 152,850.00 2 MDJUD 0000056950 07/01/2016 0000012732 Approved ADVANCE DIGITAL SYSTEMS INC 199,176.00 34,362.07 164,813.93 3 MDJUD 0000056952 07/01/2016 0000004584 Approved COMPUWARE CORPORATION 117,223.00 0.00 117,223.00 CONFIRM Return Cancel
10.	**Click the CONFIRM button to submit the notification to Procurement to close the requested POs.**	
11.	**A system message displays confirming that the PO Close Request was successfully submitted.**	 Message Purchase Order Close Request Sucessfully Submitted (20000,58) An email has been sent to DPCA (Procurement) with your request. OK

12.	**Click the** **button.**

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