MARYLAND JUDICIARY

GEARS
General Enterprise And Resource Support

Quick Reference Tip Sheet

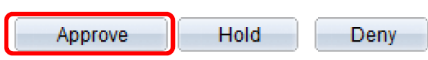
LAST REVISED DATE: 06/07/2017

General Information

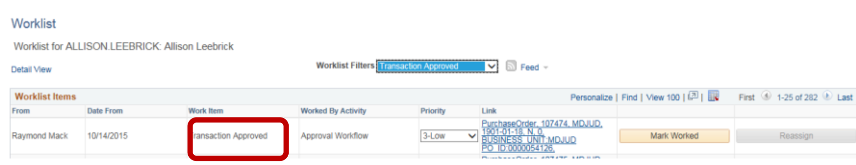
Task	Process Information
Understanding Workflow and Using the Worklist **Note:** If additional assistance is needed, please contact the respective AOC Department staff or the JIS Service Desk.	Workflow provides a means to automatically enforce business authorization processes, so they can be applied 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. When there is work that requires your approval or there is a notification that something has occurred, an automatic communication puts the item in your **Worklist**. 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. 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.

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

Approve

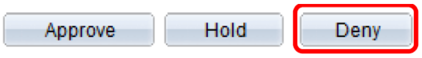
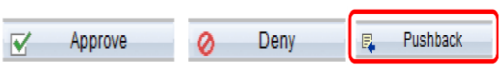
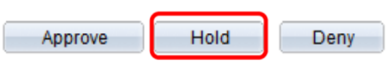
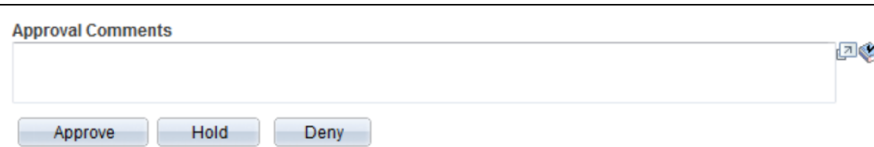


NOTE: Please refer to the **Approval Levels and Dollar Thresholds** document for more information about the Judiciary's approval levels for each type of transaction.

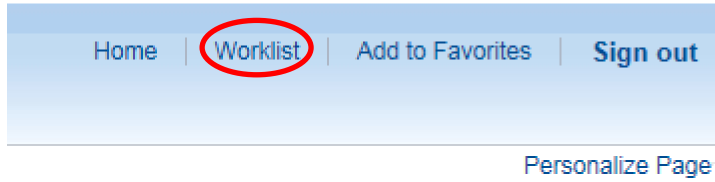


Approval action routes an email and Worklist item notification back to the originator of the transaction (after all approvers have approved). Examples follow:

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.

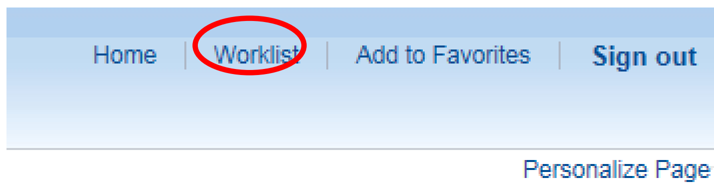
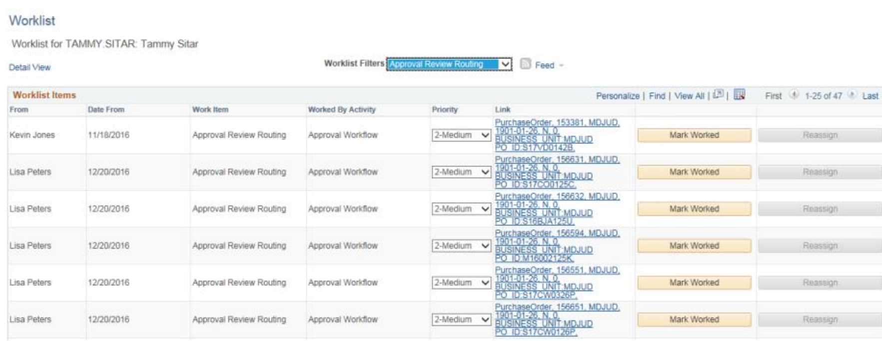
Deny 	***Denial*** action stops the workflow and routes an email and Worklist item notification to the originator of the transaction. Examples follow: 1. Requisition routes back to the Requestor. Requisitions, once denied, can be corrected by editing the Requisition to make corrections and to be resubmitted. 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.
Push-back 	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). When a ***Push-Back*** has been received (by the previous approver), he/she must take appropriate action (e.g., provide justification, attach additional documentation, etc.), prior to approving the transaction again or denying the transaction.
Hold 	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: Request the buyer 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.
Comments	 ***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.

GEARS Navigation

You can find your Worklist in the upper right hand corner of your GEARS (PeopleSoft Financials) Screen.	

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.**	

Worklist Filters	Worklist Filters is a way to filter (limit) your displayed items to a specific type of work item like “***Approval Routing”***, “***Approval Review 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**, (2) **Approval Review Routing, or (3) 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 Review Routing means that a Review is required for the transaction. Lastly, Approval Routing means that an approval is required for the transaction. **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***.

<table>
<tr>
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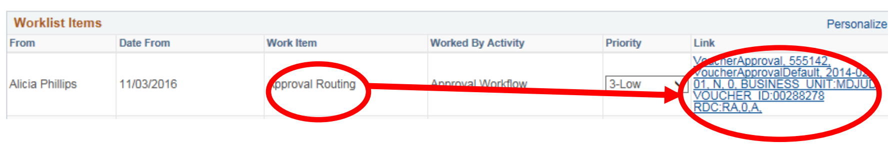
<td></td>
<td>
<table>
<tr><td>Priority</td><td>Work Item defaults to (1- High, 2- Medium, 3- Low) priority.
NOTE: Priority setting defaults are displayed on a user's Worklist. The priority setting can be changed by the user for his/her own use in filtering and (will only impact this user’s Worklist). 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).</td></tr>
<tr><td>Link</td><td>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 RED, 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.</td></tr>
<tr><td>Marked Worked</td><td>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.</td></tr>
</table>
NOTE: You can use the grid features to order (sort) columns
</td>
</tr>
<tr>
<td>3.</td>
<td><u>If the work item requires approval</u>, 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.</td>
<td>
</td>
</tr>
</table>

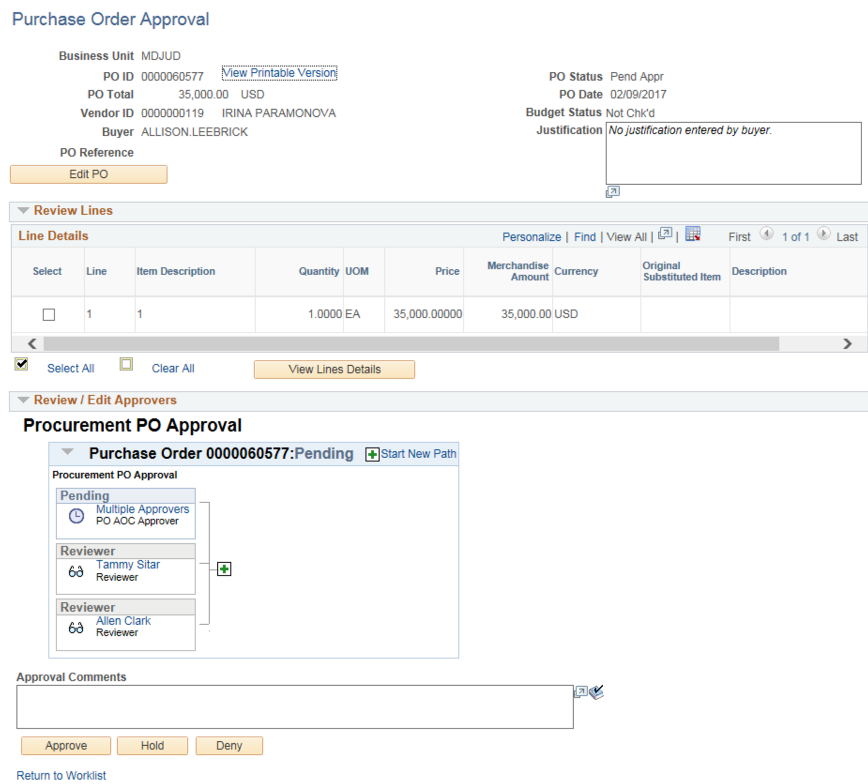
3b.

The Approval page displays the transaction that requires your approval including item details such as status, amounts, dates, and line details.

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.

You can Approve, Hold or Deny the transaction (See the "Workflow Concepts" section for further details).

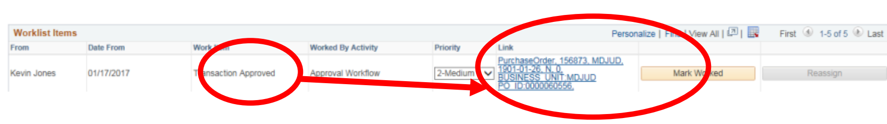
Once you take action on the item, it will automatically be removed from your Worklist.



Edit PO	Click this button to navigate out of the worklist and go to the purchase order page
Approve	Click this button to approve the transaction
Hold	Click this button to put the transaction on hold
Deny	Click this button to deny the transaction
Approval Comments	Use this free form text field to include comments

4.

<u>To view the notifications for transactions that have already been approved (by you or another approver)</u>, select an item where the Work Item column is *"Transaction Approved"*, and click on the Link.



<table>
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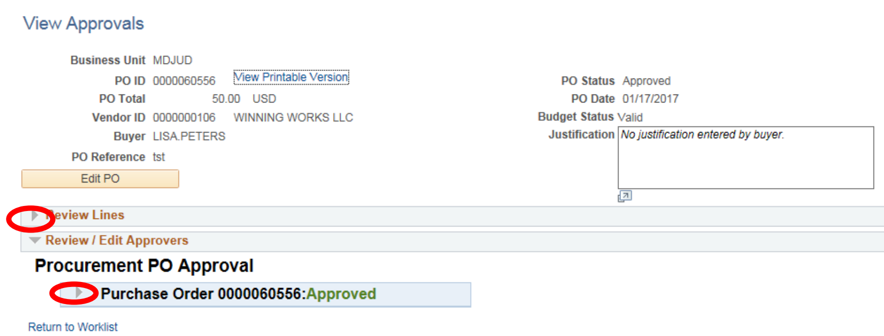
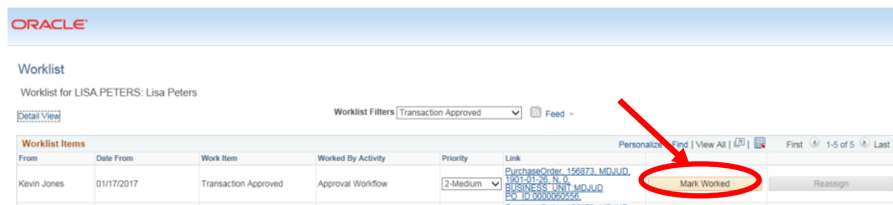
<td>4b.</td>
<td>The View Approvals page displays the transaction details including approval status, approvers, transaction status, amounts, dates, and line details.

NOTE: Click on the arrows to see the approvers and line details.</td>
<td>
</td>
</tr>
<tr>
<td>5</td>
<td><u>If a transaction has already been worked by another approver, mark the worklist item as worked,</u> by clicking the “Mark Worked” button to remove it from your worklist.</td>
<td>
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