Global Electronic Approval Routing System (GEARS)

AGENDA
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- Benefits
- Why is HRO using GEARS?
- How to use GEARS
- Routing lists
- GEARS - FYSA
- HRO Metrics
- Questions

WHAT IS GEARS?

GEARS is an online document routing system that allows for real-time distribution, processing and decisions on forms, documents and other correspondence.

BENEFITS

➢ Replaces hard copy routing/distribution of documents

➢ Real-time situational awareness

➢ Allows for decisions to be made on important questions/issues by one person, or a group of people

➢ Multiple people can be included to take action on a routed document

➢ Documents won't fall into the mysterious "black hole" of distribution

BENEFITS (CONT'D)

➢ Individuals can be added to the Notifications area for situational awareness

➢ Can see where a documents is currently at for action

➢ Comments can be added by individuals in the document routing

➢ Routings are time-stamped which can be used for metrics

WHY IS THE HRO USING GEARS?

➢ Previously, all documents submitted to the HRO were done with hard copies through distribution

➢ Documents would get lost either in distribution, on someone's desk, or in the return back to the requestor

➢ Routing lists could be created to mimic the path of specific personnel actions to ensure the correct people actioned the request in the correct order

➢ Kept everyone honest concerning a document's status

HOW TO USE GEARS

➢ No special permissions are required to use GEARS

➢ As long as an individual has a CAC and an account in the Global Address List (GAL), they have access to GEARS

➢ Determine who needs to see/action your routed document, in what order. Are there others who need view-only access?

➢ PDF documents are preferred, especially if signature needed. GEARS will accept attaching multiple formats of documents, but generally speaking, PDF is preferred

HOW TO USE GEARS

➢ Goto: https://army.deps.mil/netcom/sites/GEARS/Home.aspx

➢ Select:

GEARS version 5 (Site 2)

Live - Current production version (new site collection as of September 2017)

GEARS version 5 (Site 3)

HOW TO USE GEARS (CONT'D)

➢ Select:

HOW TO USE GEARS (CONT'D)

➢ Type a Packet Name:

** **Very Important**
Please include **unit** in **Packet Name** to assist HR professionals determine who needs to action workflow.

New Packet | **My Packets** | **My Actions**

Packet Information

Packet Name

EFF DATE - UNIT - EMP NAME - TYPE OF ACTION   ✕

Packet Type

? Make a selection

Originating Organization

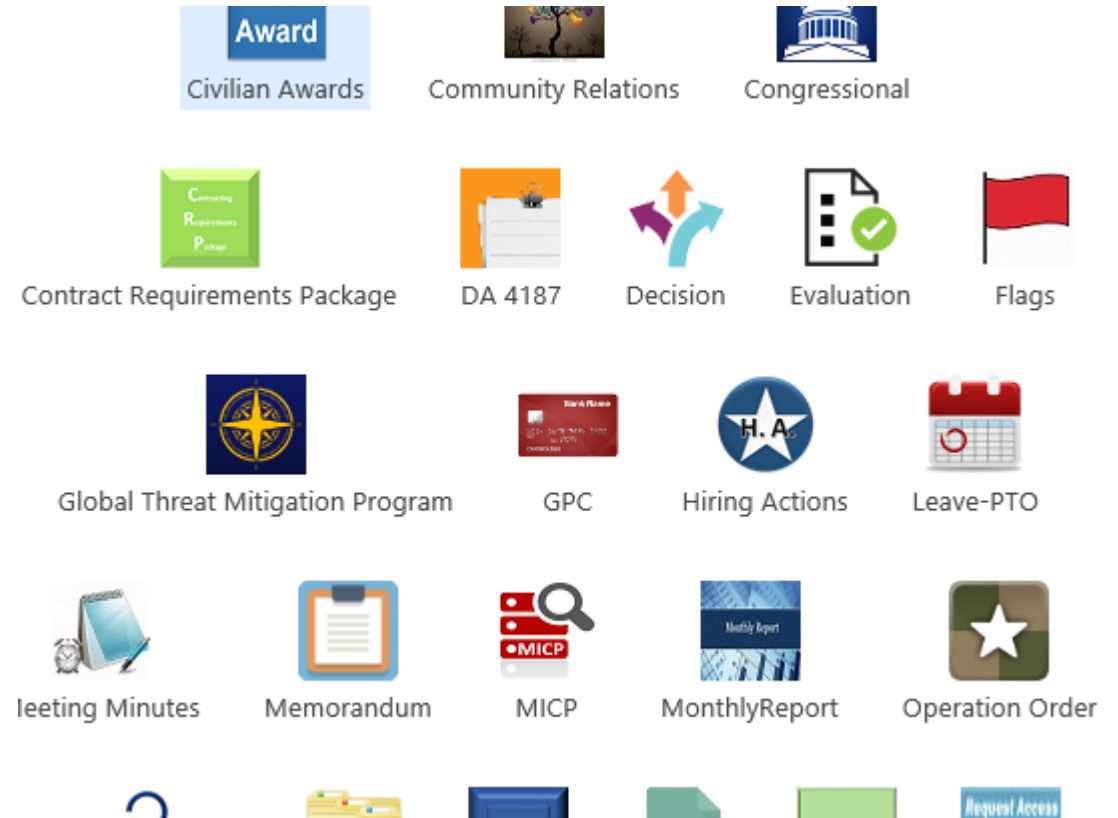HRO

ⓘ The information in this box can be viewed by everyone

Proceed to the next step »

HOW TO USE GEARS (CONT'D)

➢ Select Packet Type from list:

Civilian Awards

Community Relations

Congressional

Contract Requirements Package

DA 4187

Decision

Evaluation

Flags

Global Threat Mitigation Program

GPC

Hiring Actions

Leave-PTO

Meeting Minutes

Memorandum

MICP

MonthlyReport

Operation Order

HOW TO USE GEARS (CONT'D)

➢ Click Proceed to the Next Step:

The information in this box can be viewed by everyone

Proceed to the next step »

HOW TO USE GEARS (CONT'D)

➢ Add any files needed to be routed by clicking the + button and dragging files over to be uploaded. **PRO TIP**: Ensure files being uploaded are NOT password protected. If necessary, print a copy, scan and upload into GEARS.

Signature Files

Add only the documents here that require a signature, if any.

Packet Files
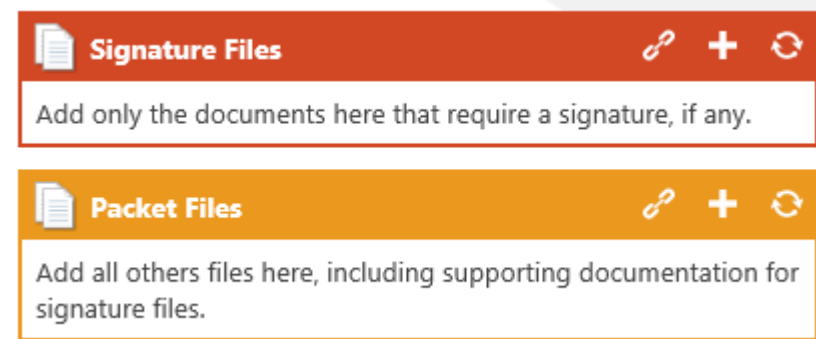
Add all others files here, including supporting documentation for signature files.

HOW TO USE GEARS (CONT'D)

➢ 1. Add an additional packet POC, if needed

➢ 2. Add comments / instructions for the people in the routing

➢ 3. Due Date – generally day prior to the effective date of the action **PRO TIP**: do not make the date the day after you initiate the routing (unless it truly is due that day)

➢ 4. Click the Add the route button

Miller, James D SMSgt USAF NG AZANG (US)
Packet POC
Make someone else the POC

1

Packet Discussion/Instructions:

2

Packet Recommendation:
Add the recommendation box

Packet Due Before: Each Action Given:

3   Day(s)

3

Add the route »   **4**

HOW TO USE GEARS (CONT'D)

➢ Click Add a user / group to manually select the routing

➢ Click Insert an existing routing to select a previously created & saved routing list

➢ At this point, a new window will be created to add people into the Notifications area. Anyone in the Notifications can see the packet and the attachments, but cannot action the workflow in any way.
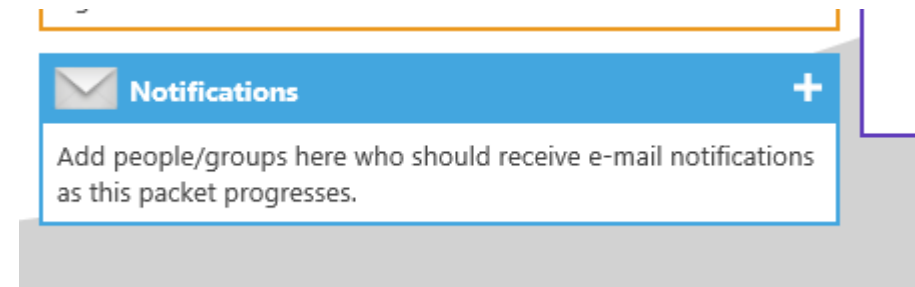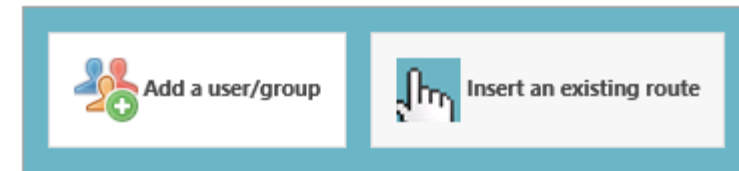
HOW TO USE GEARS (CONT'D)

➤ You can add a pre-defined group into the routing, or an individual person, and route the packet in the order it needs to flow for review and/or signature. **PRO TIP**: If you need to create a group, you must submit a help ticket thru the GEARS Help Desk and they will create the group for you.

➤ Select what the task is from one of the four options available.

HOW TO USE GEARS (CONT'D)

> By selecting the small box on the right side of the routing will allow you to select an additional person/persons for that level in the routing. NOTE: the packet will not route forward until all persons at that level have actioned. Each person can have individual responsibilities assigned to them. **PRO TIP**: Do not use ~~Concur/Nonconcur~~; it will keep GEARS from allowing edits to documents uploaded into the workflow….use **Review for Corrections** instead.
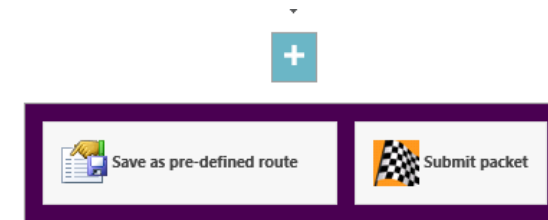
HOW TO USE GEARS (CONT'D)

➢ Once the routing is set, you can either save it as a pre-defined route, or submit the packet. **PRO TIP**: Saving as a pre-defined route is something only you can see.
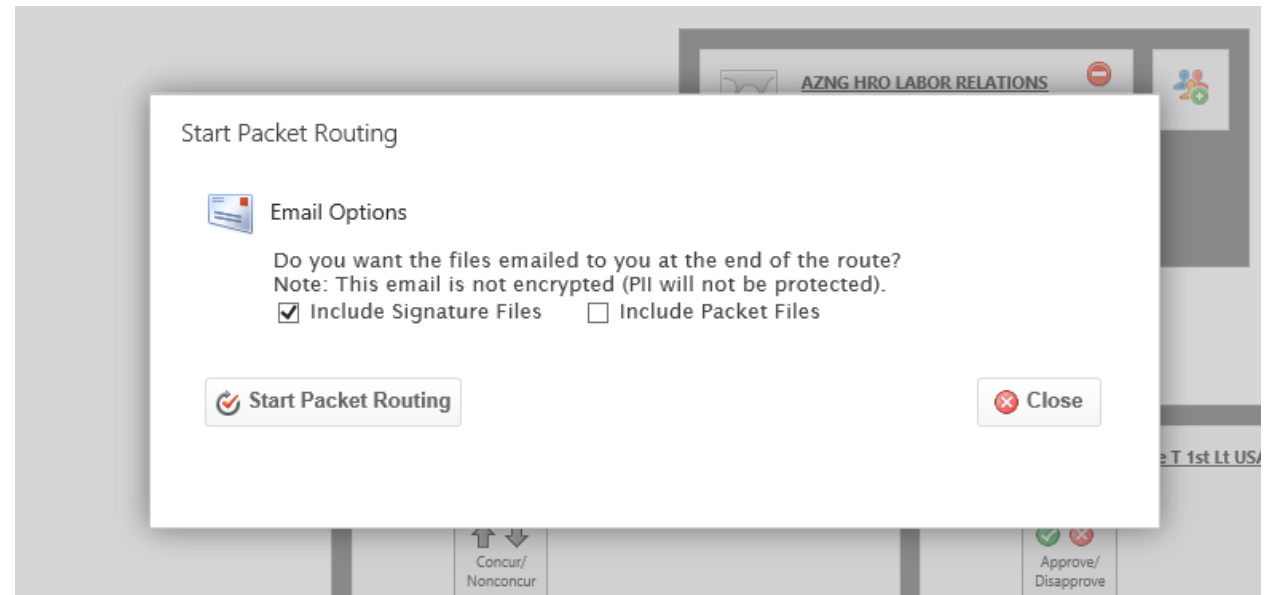
HOW TO USE GEARS (CONT'D)

➢ When you submit the packet for routing, select if you want the signature files sent to you and/or the packet files and start the packet routing forward.

HOW TO USE GEARS (CONT'D)

➢ To check the status of the packet, go to Packets In Route under My Packets/Packets Created By Me

ROUTING LISTS

- ➤ GEARS has the ability to create unique routing lists and distribution groups (groups are created by GEARS help desk)
- ➤ Helpful if people work different shifts, leave schedules, or wider visibility if needed for an action
- ➤ Multiple people can be placed at each stop for the packet, with each having a unique task.
- ➤ The HRO has created routing lists for various personnel actions, and the document is available on the HRO web site. (*Now one list, versus two lists)
- ➤ Workflows to the HRO from the 161st & 162nd should be routed through the HR Remotes.

GEARS - FYSA

➢ Be mindful of the comments you type into a GEARS workflow. Everyone in the workflow, to include those in the Notifications, can see those comments.

➢ Once a workflow is completed, attachments fall out of GEARS workflows after ~~21~~ 10 calendar days. Be sure and save a copy of the workflow if you would like an archived copy.

➢ By sure and select the correct profile (.mil or .civ) when adding someone to the workflow routing.

➢ GEARS workflows can, from time-to-time, get "stuck" for some unknown reason. If that happens, a new workflow will need to be initiated in its place.

QUESTIONS?

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