

Requisition Routing A Users Perspective

by

JP Hollingsworth

12/10/2013

Requisition routing allows remote users to enter a requisition and have it flow through an approval process that ultimately ends in the requisition becoming a Purchase Order. This speeds up the requisition approval process and allows for automated management of requisition approvals and a paperless environment.

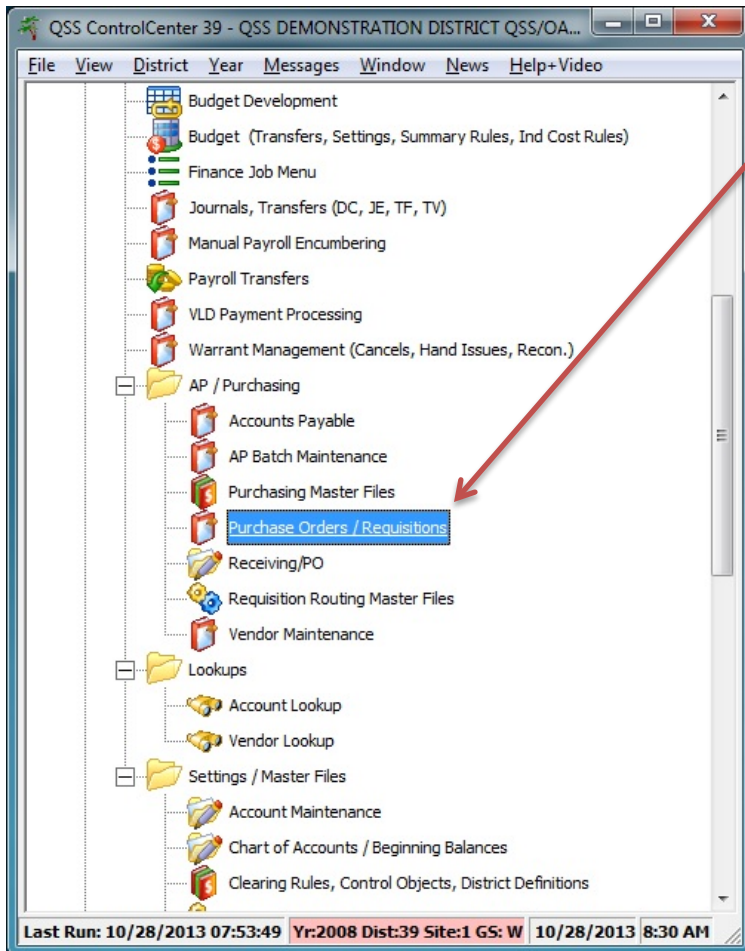
What we will learn today

- How to enter a requisition.
- How to review the status of a requisition.
- How to manage your queue and approve a requisition.

How to enter a requisition

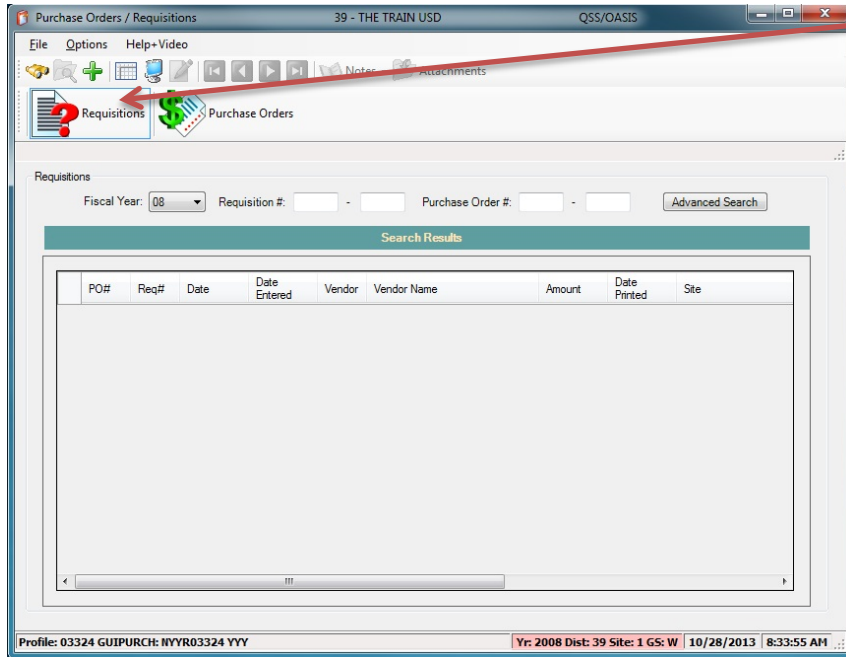
- How to open the requisition module.
- How to add a new requisition.
- What fields are in the requisition entry form.
- How to add items to a requisition.
- What fields are in the requisition items form.
- How to save and create the requisition.
- How to save a requisition in draft mode.

How to open the requisition module



- From the main QSS screen, go to the AP/Purchasing folder and click on Purchase Orders / Requisitions.
- You can also add the Purchase Orders / Requisition module to your favorites and open it from there.

How to add a new requisition



- You must be on the requisition tab in order to create a new requisition.
- You can create a new requisition by clicking on the “green plus” icon, using the keyboard shortcut “F9”, or going to Options > Add.

What fields are on the requisition entry form

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help
Save and Return Save Save Draft Close Items Notes Options

Requisition
Requisition: *New* Purchase Order: Control #: Warehouse: Stores Order:
Vendor/Addr#: 999999 / 00- Date: 06/30/2010
PO Type: PO - PURCHASE ORDER Delivery By: Confirming: 0 - No confirmation message
Description: Tax %: 7.750 % Ship To: 0000 "No Shipping Location" (0000)
Submitted by: Terms: Commodity:
Site: 0000 UNASSIGNED (0000) FOB:
Buyer: Program: Misc Date: Misc:
Routing Group: GroupA Room: Discount: .000 % Shipping %:

Accounts
Add Row Delete Selected Row

Ln	FU	RESC	Y	GOAL	FUNC	OBJT	SCH	MNGT	BU	Percent	Budget	Balance
1	I	.	.	.	.	.	.	.	.	.	.00	

Address (00) Additional Shipping Beg Message End Message

Vendor Remit

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 10/29/2013 9:05:37 AM

- Requisition number
- Purchase Order number
- Control number
- Warehouse
- Stores Order
- Vendor/Address number
- Date
- PO Type
- Delivery By
- Confirming message
- Description
- Tax %
- Ship To address

What fields are on the requisition entry form

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help
Save and Return Save Save Draft Close Items Notes Options

Requisition

Requisition: **New** Purchase Order: Warehouse: Stores Order:

Vendor/Addr#: 999999 / 00 Date: 06/30/2010

PO Type: PO - PURCHASE ORDER Delivery By: Confirming: 0 - No confirmation message

Description: Tax %: 7.750 % Ship To: 0000 "No Shipping Location" (0000)

Submitted by: Terms: Commodity:

Site: 0000 UNASSIGNED (0000) FOB: Program: Misc Date: Misc:

Buyer: Program: Misc Date: Misc:

Routing Group: GroupA Room: Discount: 0.000 % Shipping %:

Accounts

Add Row Delete Selected Row

Ln	FU	RESC	Y	GOAL	FUNC	OBJT	SCH	MNGT	BU	Percent	Budget	Balance
1	I	.	.	.	.	.	.	.	.	.	.00	

Address (00) Additional Shipping Beg Message End Message

Vendor

Remit

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 10/29/2013 9:05:37 AM

- Submitted by
- Terms
- Commodity code
- Site number
- FOB
- Buyer
- Program
- Misc Date
- Misc
- Routing Group
- Room
- Discount % (Version L Only)
- Shipping %

What fields are on the requisition entry form

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help
Save and Return Save Save Draft Close Items Notes Options

Requisition

Requisition: **New*** Purchase Order: Warehouse: Stores Order:

Vendor/Addr#: 999999 / 00- Date: 06/30/2010

PO Type: PO - PURCHASE ORDER Delivery By: Confirming: 0 - No confirmation message

Description: Tax %: 7.750 % Ship To: 0000 "No Shipping Location" (0000)

Submitted by: Terms: Commodity:

Site: 0000 UNASSIGNED (0000) FOB: Program: Misc Date: Misc:

Buyer: Routing Group: GroupA Room: Discount: 0.000 % Shipping %:

Accounts

Add Row Delete Selected Row

Ln	FU	RESC	Y	GOAL	FUNC	OBJT	SCH	MNGT	BU	Percent	Budget	Balance
1	I	.	.	.	.	.	.	.	.	.	.00	

Address (00) Additional Shipping Beg Message End Message

Vendor

Remit

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 10/29/2013 9:05:37 AM

- Accounts
- Address (00 – Default)
- Additional (addresses)
- Shipping (address)
- Beginning Message
- Ending Message

Definition of the fields on the requisition entry form

- Requisition number – This field can be setup to be automatic via an odometer or manually entered.
- Purchase Order number – This field can be setup to be automatic via an odometer or manually entered.
- Control number – This field is ONLY supported in Version L. This is an internal number that your organization can use to assign a number to this requisition/purchase order.
- Warehouse – Leave blank in most cases. If the interface is active, can create a Warehouse stores order.
- Stores Order number – Can either be manually entered or the odometer can be used.
- Vendor/Address number – This is the vendor that will be used to purchase the items on this requisition. You may also select a specific remit address here.
- Date – This field will default to today's date as long as the user is logged into the current fiscal year, otherwise if you are in the previous fiscal year, it will default to the last day of that fiscal year. This field is editable as well.
- PO Type – Typical PO types are Purchase Order, Blanket PO, Confirming Purchase Order, and Service Agreement.

Definition of the fields on the requisition entry form

- Delivery By – This is an optional field that you can type a date in.
- Confirming message – This is a message that can be set to print on the PO after requisition becomes a PO. These messages are created by your system administrator.
- Description – This is a 30 character field.
- Tax % - This will display the default tax %, you can type a different %.
- Ship To address – This field allows you to select the address to ship the items to.
- Submitted by – Optional field to type the name of the submitter of the requisition.
- Terms – Optional 20 character field, used for specifying FOB or discount. With appropriate security, can have default Terms/FOB.
- Commodity – Optional field, can select a commodity code from the list if setup.
- Site – Select a site from the list, usually the site that is ordering the items.
- FOB – Optional field, can type the FOB point, this information will print on the PO.
- Buyer – Depending on security can be optional or mandatory. Can select a buyer code from the drop down list.

Definition of the fields on the requisition entry form

- Program – Optional field, can type a program name associated with the PO.
- Misc. Date – Optional field, can type a date for tracking PO's. This field can be relabeled via user security.
- Misc. – Optional field, this is a 4 character field. This field can be relabeled via user security.
- Routing Group – This field only shows for sites that are using requisition routing. If you only belong to one routing group, only that group will show and you cannot change it. If you belong to two or more routing groups, you can change the group to the one you wish to use. Every user should have a primary group that would be the default group, this is what would automatically be entered when a new requisition is created.
- Room – Optional field, this is a 20 character field.
- Discount % - Version L ONLY - This sets a global discount for the entire requisition, this can be overridden on an individual item as well as in the items form.

Definition of the fields on the requisition entry form

- Shipping % - This is an informational field showing the shipping percentage charged by the vendor from the vendor master file.
- Accounts field – This is where you enter the account code/s that will be used for this requisition. Up to 40 accounts can be added here. You may also enter a pseudo-code if set up correctly (speeds up entry of commonly used accounts). This also allows you to charge a specific percentage to each account. The grid also includes the budget balance for each account.
- Address Tab – Default main address will show up here.
- Additional Tab – Additional addresses show up here.
- Shipping Tab – The Ship To address will show up here.
- Beg Message – Beginning message that will print on the PO form.
- End Message – Ending message that will print on the PO form.

How to add an item to a requisition

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options Help

Save and Return Save Save Draft Close Items Notes Options

Requisition

Requisition: **New*** Purchase Order: Control #: Warehouse: Stores Order:

Vendor/Addr#: 999999 / 00- Date: 06/30/2010

PO Type: PO - PURCHASE ORDER Delivery By: Confirming: 0 - No confirmation message

Description: Tax %: 7.750 % Ship To: 0000 "No Shipping Location" (0000)

Submitted by: Terms: Commodity:

Site: 0000 UNASSIGNED (0000) FOB:

Buyer: Program: Misc Date: Misc:

Routing Group: GroupA Room: Discount: 000 % Shipping %:

Accounts

Add Row Delete Selected Row

Ln	FU RESC Y GOAL FUNC OBJT SCH MNGT BU	Percent	Budget Balance
1	.		.00

Address (00) Additional Shipping Beg Message End Message

Vendor Remit

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 10/29/2013 9:05:37 AM

- You can add an item one of three ways.
 - Click on the Items Icon.
 - Under the Options menu, select Items.
 - Use the keyboard shortcut “F4”.
- Additional Information
 - Required fields on the main requisition form must be entered before it will allow you to go to the Items form.
 - Errors on the main requisition form must be cleared before it will allow you to go to the Items form.

What fields are on the requisition entry Items form

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options

Save Item Save Item/Main Main/Save Main Add Item Save Item/Add Item Cancel Item AddMode

Subject to tax: 0.00 Rate: 7.750 % Sub Total: 0.00 Total Tax: 0.00 Total: 0.00

Item 1 of 1

Item	Print	Split	Quantity	Unit	Unit Cost	Total Cost	Tax	Stock #	Fixed Asset
1	Yes	Calculate Percentage	.00	EACH	0.0000	0.00	Yes	000000	

Discount Flag: No Discount Discount Percentage: .0000 % Discount Amount: 0.00

Description: # lines remaining:

Accounts

In	FU	RESC	Y	GOAL	FUNC	OBJ	SCH	MNGT	BU	Amount	Percent
1	01	0000	0	11110	1001	4300	110	4106	00	0.00	100.00

Items

Item	Print	Split	Quantity	Unit	Unit Cost	Sub-Total	Estimated Tax	Est. Total w/ Tax	Tax	Stock#

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 11/4/2013 11:50:54 AM

- Subject to Tax
- Rate %
- Sub Total
- Total Tax
- Total
- Item line #
- Print
- Split
- Quantity
- Unit
- Unit Cost
- Total Cost
- Tax

What fields are on the requisition entry Items form

Requisition Entry 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options

Save Item Save Item/Main Main/Save Main Add Item Save Item/Add Item Cancel Item

Subject to tax: 0.00 Rate: 7.750 % Sub Total: 0.00 Total Tax: 0.00 Total: 0.00

Item 1 of 1

Item	Print	Split	Quantity	Unit	Unit Cost	Total Cost	Tax	Stock #	Fixed Asset
1	Yes	Calculate Percentage	.00	EACH	0.0000	0.00	Yes	000000	

Discount Flag: No Discount Discount Percentage: .0000 % Discount Amount: 0.00

Description: # lines remaining:

Accounts

In	FU	RESC	Y	GOAL	FUNC	OBJ	SCH	MINGI	BU	Amount	Percent
▶	01	0000	0	1110	1001	4300	110	4106	00	0.00	100.00

Items

Item	Print	Split	Quantity	Unit	Unit Cost	Sub-Total	Estimated Tax	Est. Total w/ Tax	Tax	Stock#
------	-------	-------	----------	------	-----------	-----------	---------------	-------------------	-----	--------

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 11/4/2013 11:50:54 AM

- Stock #
- Fixed Asset
- Description
- Accounts
- Item Summary

Definition of the fields on the requisition entry Items form

- Subject to Tax – Informational only, total of all line items subject to tax.
- Rate % - Informational only, Tax Rate used for the requisition.
- Sub Total – Informational only, Sub total of all line items before tax.
- Total Tax – Informational only, total tax amount for all line items subject to tax.
- Total – Informational only, total amount for all line items after tax.
- Item line # - The current Item line number you are on.
- Print – You have four options.
 - Yes – Will print line item information and description on the PO form.
 - No – You cannot enter line item information except for a description. The information you enter in the description only shows up online and will not print on the PO form. To avoid a blank line on the printed PO form, use this option as your very last line item.
 - Display only – You cannot enter line item information except for a description. The information you enter in the description will be combined with the previous line item description. This is used to create extended or very large descriptions. Each description allows 60 lines, you may have up to 990 lines of description by using this method to extend the description.
 - Ship/Freight – Use if this item is to record the shipping/handling for the requisition. Use split code as necessary to change shipping/handling to appropriate account(s). Enter shipping/handling amount in unit cost and mark taxable if applicable.

Definition of the fields on the requisition entry Items form

- Split – You have four or more options. CP(calculate percentage is the default).
 - Calculate percentage – The system calculates how much to charge to each account. It multiplies the total for the account line by the percentages for each account on the Requisition Entry form.
 - Special Percentage – Specify the percentage of the line item to charge to each account. Fill in the Item Percent column for each account in the Accounts Grid, the total percentage must be 100%.
 - Special Dollar – Specify the dollar amount to charge to each account. Fill in the Item Amount column for each account in the Accounts Grid, the total amount must be equal to the Total Cost for the item.
 - Account Line xx – This allows you to charge the entire line item to a specified account line.
- Quantity – This is a whole number for how many items to order. In version L, this can be a fractional quantity.
- Unit – This is a unit of issue up to four characters long.
- Unit Cost – This is the cost of each unit. You may go up to four digits to the right of the decimal point for items that have fraction of a cent prices.
- Total Cost – The system calculates the total cost for the line item.
- Tax – Select “Yes” for an item subject to tax or “No” for a non-taxable item.
- Stock # - Leave blank, or type a stock number from the Stores system.

Definition of the fields on the requisition entry Items form

- Fixed Asset – Select “Yes” to flag this item as a fixed asset, otherwise leave blank or “No” if the line item is not used to associate the item with a fixed asset on file in the Fixed Assets system.
- Description – Each line item can have up to 60 lines of description up to 36 characters long. The maximum number of lines for a requisition is 990. The first item on a requisition must have at least one line of description.
- Accounts – The Accounts grid displays the accounts for the requisition, as defined on the Requisition Entry form. The Amount is the total charged to each account for the entire requisition. The totals will only update after the item has been saved.
- Item Summary – The Items grid displays the cost of each line item. It is updated each time you save a line item.

How to save and create the requisition

The screenshot displays the 'Requisition Entry' window for '40 - QSS DEMONSTRATION DISTRICT'. The interface includes a menu bar with 'File' and 'Options', and a toolbar with icons for 'Save Item', 'Save Item/Main', 'Save Item/Main/Save', 'Main', 'Add Item', 'Save Item/Add Item', and 'Cancel Item'. The main area shows item details for 'Item 2 of 2' with a quantity of .00 and a unit cost of 0.0000. Below this is a table for 'Accounts' and a table for 'Items'.

Ln	FU	RESC	Y	GOAL	FINC	OBJT	SCH	MNGT	BSU	Amount	Percent
1	01	0000	0	0000	0000	8011	890	5510	000	253.21	100.00

Item	Print	Split	Quantity	Unit	Unit Cost	Sub-Total	Estimated Tax	Est. Total w/ Tax	Tax	Stock#	FA	DF
1	Y	CP	5.00	EACH	47.0000	235.00	18.21	253.21	Y	000000		N

- Once you have entered an item, you have three ways to save the item.
 - The Save Item icon.
 - Under the Options menu, select Save Item.
 - Use the keyboard shortcut “F9”.
- You can enter additional items one of three ways.
 - The Add Item icon.
 - Under the options menu, Add Item.
 - Use the keyboard shortcut “F8”.
- You may also use the Save Item/Add Item feature. This has three ways as well.
 - The Save Item/Add Item icon
 - Under the Options menu, Save Item/Add Item.
 - Use the keyboard shortcut “Shift F8”.

How to save and create the requisition

The screenshot shows the 'Requisition Entry' window for '40 - QSS DEMONSTRATION DISTRICT'. The interface includes a menu bar with options like 'File', 'Options', 'Save Item', and 'Add Item'. Below the menu, summary fields show 'Subject to tax: 235.00', 'Rate: 7.750 %', 'Sub Total: 235.00', 'Total Tax: 18.21', and 'Total: 253.21'. The main area displays 'Item 2 of 2' with fields for 'Quantity' (.00), 'Unit' (EACH), 'Unit Cost' (0.0000), 'Total Cost' (0.00), and 'Tax' (Yes). A 'Description' field is empty, with a note '59 lines remaining'. Below this are 'Accounts' and 'Items' tables.

Ln	FU	RESC	Y	GOAL	FINC	OBJT	SCH	MMGT	BSU	Amount	Percent
1	01	0000	0	0000	0000	8011	890	5510	000	253.21	100.00

Item	Print	Split	Quantity	Unit	Unit Cost	Sub-Total	Estimated Tax	Est. Total w/ Tax	Tax	Stock#	FA	DF
1	Y	CP	5.00	EACH	47.0000	235.00	18.21	253.21	Y	000000		N

Profile: 13305 GUIPURCH: YYYY13305 YYY Yr: 2010 Dist: 40 Site: 0 GS: W 11/6/2013 10:16:33 AM

- When you are done adding items you have two options.
 - Save Item/Main, this will save the item you are on and take you back to the main requisition entry screen.
 - Save Item/Main/Save, this will save the item you are on and save the entire requisition giving you a requisition number.
- You have three ways to toggle back to the main requisition entry form.
 - The Main icon.
 - Under the File menu, select Main.
 - Use the keyboard shortcut “F12”.

How to save and create the requisition

The screenshot shows the 'Requisition Entry' window for '40 - QSS DEMONSTRATION DISTRICT'. The interface includes a menu bar (File, Options, Help) and a toolbar with icons for Save and Return, Save, Save Draft, Close, Items, and Notes. The main form is divided into several sections:

- Requisition:** Includes fields for Requisition (New*), Purchase Order, Control #, Warehouse, and Stores Order.
- Vendor/Addr#:** 999999 / 00-
- Date:** 06/30/2010
- PO Type:** PO - PURCHASE ORDER
- Delivery By:** [Empty]
- Confirming:** 0 - No confirmation message
- Description:** [Empty]
- Tax %:** 7.750 %
- Ship To:** 0000
- Commodity:** [Empty]
- Submitted by:** [Empty]
- Terms:** [Empty]
- FOB:** [Empty]
- Site:** 0000 UNASSIGNED (0000)
- Buyer:** [Empty]
- Program:** [Empty]
- Misc Date:** [Empty]
- Misc:** [Empty]
- Routing Group:** GroupA
- Room:** [Empty]
- Discount:** .000 %
- Shipping %:** [Empty]

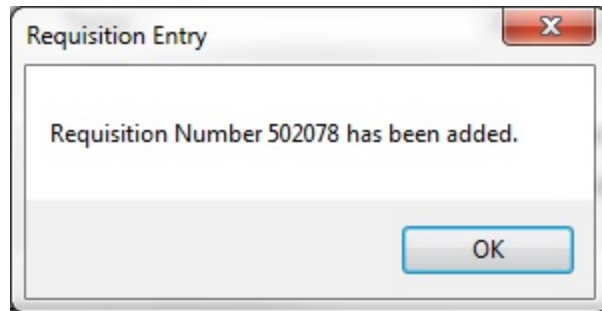
Accounts: A table with columns 'Ln', 'FU RESC Y GOAL FUNC OBJT SCH MNGT BU', 'Percent', and 'Budget Balance'. It contains one row with a blue selection bar and a value of '.00' in the Budget Balance column.

Address (00): Includes tabs for Additional, Shipping, Beg Message, and End Message. Below are two large yellow rectangular boxes labeled 'Vendor' and 'Remit'.

Footer: Profile: 13305 GUIPURCH: YYYY13305 YYY | Yr: 2010 Dist: 40 Site: 0 GS: W | 10/29/2013 9:05:37 AM

- After you have completed adding items you can either save the entire requisition from the item screen or if you return back to the Main requisition entry form you have three ways to save/create the requisition.
 - The Save icon.
 - Under the options menu, select Save.
 - Use the keyboard shortcut “F9”.

How to save and create the requisition

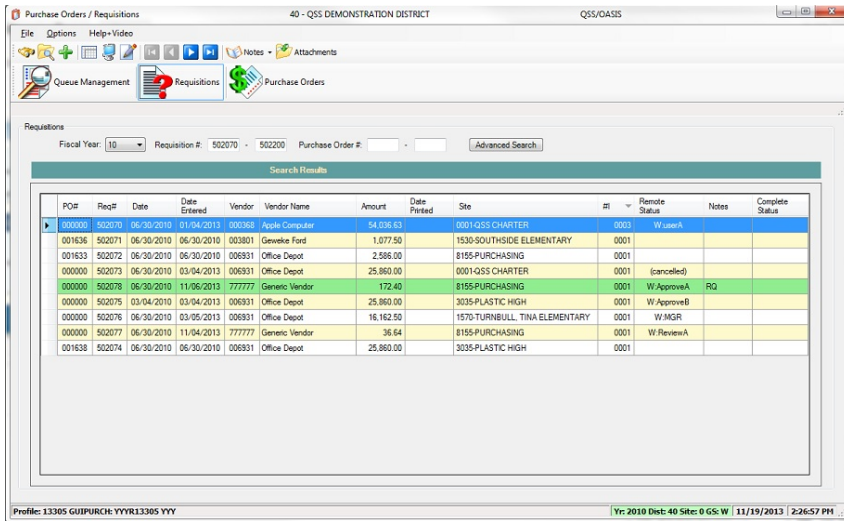


- After clicking Save, you should receive a dialog box with the requisition number.

How to review the status of a requisition

- How to search for a requisition.
- How to bring up the requisition status form.
- What information is in the requisition status form.
- What does this information mean.

How to search for a requisition



The screenshot shows the QSS/OASIS software interface. At the top, there is a menu bar with 'File', 'Options', and 'Help+Video'. Below the menu bar is a toolbar with icons for Queue Management, Requisitions, and Purchase Orders. The main window displays a search results table for requisitions. The table has columns for PO#, Req#, Date, Date Entered, Vendor, Vendor Name, Amount, Date Printed, Site, #, Remote Status, Notes, and Complete Status. The table contains several rows of data, including requisitions for Apple Computer, Geveke Ford, Office Depot, and Generic Vendor.

PO#	Req#	Date	Date Entered	Vendor	Vendor Name	Amount	Date Printed	Site	#	Remote Status	Notes	Complete Status
000000	502070	06/30/2010	01/04/2013	000368	Apple Computer	54,036.63		0001-QSS CHARTER		0003	W.Usenk	
001636	502071	06/30/2010	06/30/2010	003801	Geveke Ford	1,077.50		1530-SOUTHSIDE ELEMENTARY		0001		
001633	502072	06/30/2010	06/30/2010	006931	Office Depot	2,586.00		8155-PURCHASING		0001		
000000	502073	06/30/2010	03/04/2013	006931	Office Depot	25,860.00		0001-QSS CHARTER		0001	(cancelled)	
000000	502078	06/30/2010	11/06/2013	777777	Generic Vendor	172.40		8155-PURCHASING		0001	W.ApproveA RQ	
000000	502075	03/04/2010	03/04/2013	006931	Office Depot	25,860.00		3035-PLASTIC HIGH		0001	W.ApproveB	
000000	502076	06/30/2010	03/05/2013	006931	Office Depot	16,162.50		1570-TURNBULL, TINA ELEMENTARY		0001	W.MGR	
000000	502077	06/30/2010	11/04/2013	777777	Generic Vendor	36.64		8155-PURCHASING		0001	W.ReviewA	
001638	502074	06/30/2010	06/30/2010	006931	Office Depot	25,860.00		3035-PLASTIC HIGH		0001		

- Enter a requisition number in the first field which will search only for that requisition.
- Enter a requisition number in both fields to search and return a range of requisitions.
- After you have entered the requisition number you can search in three ways.
 - Binoculars Icon.
 - Option menu, then click search.
 - Keyboard shortcut “F3”.
- You may also search with the PO number in the same fashion, just use Purchase Order number fields.

How to search for a requisition

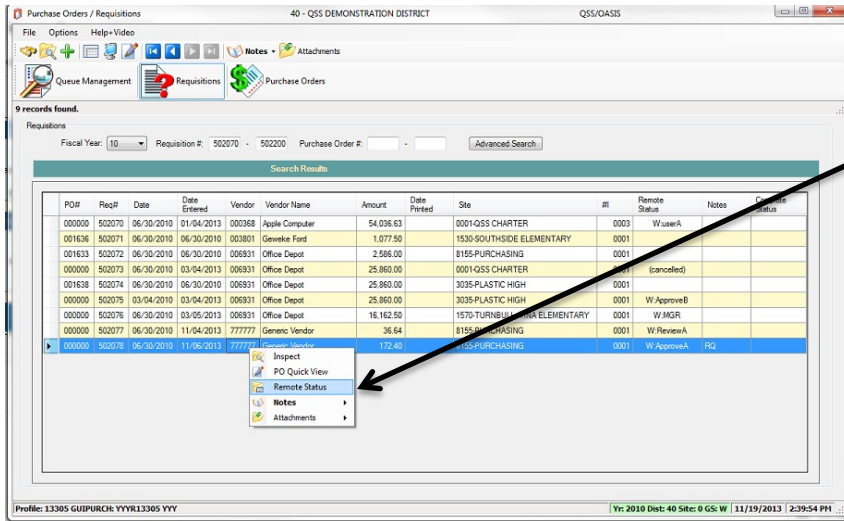
The screenshot shows the 'Requisitions Lookup' application window. The title bar indicates the user is logged in as '01 - Santa Barbara USD' and the application is 'QSS/OASIS'. The window has a menu bar with 'File' and 'Options', and a toolbar with 'Search', 'Clear Fields', and 'Close'. The main area is titled 'General Information' and 'Accounts'. It contains several sections of search filters:

- Ranges:** Purchase Order #, Requisition #, Stores Stock #, Total Amount, Control #, Line Item Amount, Quantity, and Unit Price Amount.
- Dates:** Entered Date, Paid Date, Printed Date, and Fiscal Year (set to 14).
- Flags:** PO Status, PO Type, RelForProc, Include Drafts, Budget, Board, Purchasing, Reqs W/O Accts, Asset, Cancelled, and PDF Files.
- Miscellaneous:** Buyer Codes, Vendor Number, Ordering Sites, Commodity, Description Text, Submitter, Line Item Desc, Unit of Issue, and Unpaid POs.

The status bar at the bottom shows: 'Yr: 2014 Dist: 01 Site: 65 GS: W | 12/3/2013 | 2:08:10 PM'.

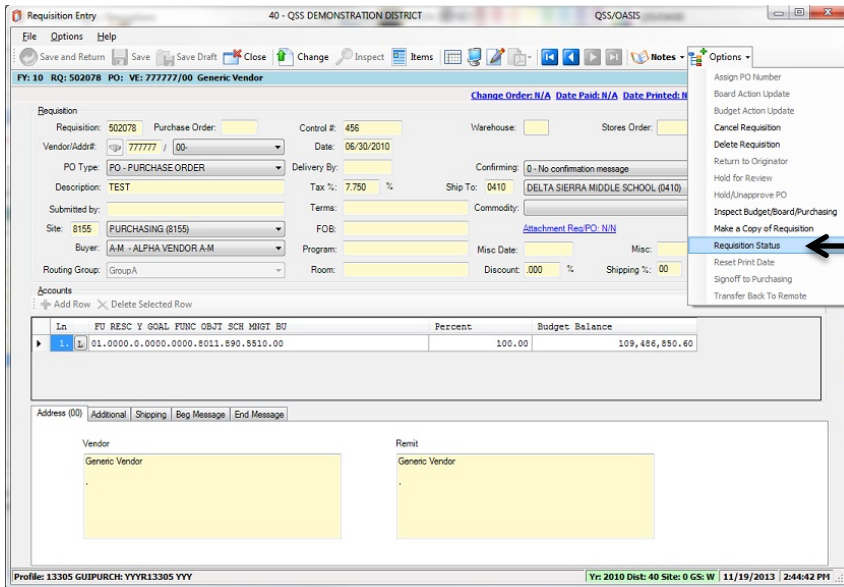
- Advance Search
 - This gives you the ability to use many filters to refine your search.
 - For a full description of all the fields you can search on, take a look at (QCC_Accounts_Payable_Purchasing Manual) starting on page 4-97.

How to bring up the requisition status form



- There are two ways to bring up the requisition status form.
- The first way is from the search grid, simply right click on the requisition line you wish to view. This will bring up a sub-menu, select “Remote Status”.

How to bring up the requisition status form



- The second is to open the actual requisition.
- Here you have two ways to open the requisition status form.
 - Options Icon on the toolbar, select “Requisition Status”.
 - Options menu, select “Requisition Options”, then select “Requisition Status”.

What information is on the requisition status form

Req. Number	Group
502078 TEST	GroupA Group A

Ser	Seq	Suf	Queue	Rule	User	Date	Time	Status
00	01	00	MGR	\$AUTO	MGR	11/19/2013	2:23p	A
00	02	00	ReviewA	\$AUTO	MGR	11/19/2013	2:24p	A
00	03	00	ApproveA	BelowAmt500		11/19/2013	2:24p	W

Show History Show Approvers Show Change Log

Assigned PO#: Printed: Times Printed:

Yr: 2010 Dist: 40 Site: 0 GS: W 11/19/2013 3:55:03 PM

- Series number
- Sequence number
- Suffix number
- Queue ID
- Rule name
- User
- Date field
- Time field
- Status
- Show History(check box)
- Show Approvers(check box)
- Show Change Log(check box)

What does this information mean

- Series number – This number will always start out at zero and whenever there is a change made to the requisition, it will increase by one.
- Sequence number – This number will increase for every approval stop. If there is a change made to the requisition that causes the Series number to change, then the Sequence number will reset back to one and again increase by one for each approval stop.
- Suffix number – This number will usually be zero, it only changes when a Node or Route has been inserted into a requisition via the re-route option, this lets us know that the route has been modified manually.
- Queue ID – This is the name of the queue for this approval stop.
- Rule name – This is the name of the Rule that was evaluated for this Queue. \$AUTO is a special rule that will ALWAYS be included in the creation of the route.
- User – This is the name of the User who has approved this approval stop.
- Date field – Only set when node is approved, changed, referred, or re-routed.
- Time field – Only set when node is approved, changed, referred, or re-routed.

What does this information mean

- Status – This field tells you what the status is for each approval stop. If the requisition has not yet arrived to an approval stop, it will be blank.
 - A = Approved.
 - C = Change was made.
 - P = PO was assigned.
 - R = Referred back to a previous approval stop.
 - W = Waiting for approval
 - X = A Node will be marked with an X when a Change, Refer, Re-route is performed and the Series changes. All the approval stops after the Change, Refer, Re-route should be marked with an X. X Status will only show up when you have the “Show History” box checked on the requisition status form.
 - XO = A re-route was performed. A Node or Route was inserted before or after the current approval stop. This includes replacing a Node or Route as well.
- Show History – By checking this option, you will see the entire detailed history of the requisitions route. This includes all the approval stops that were marked with an X because of a change made.
- Show Approvers – By checking this option, you will see who can approve each Node in the route.
- Show Change Log – Will show the changes made and give details of who made the change, when it was changed, and what was changed.

How to manage your queue

- What fields are being displayed in the grid.
- Definition of the fields in the grid.
- What options are available when on the queue tab.

Understanding the grid and what information is being displayed.

Purchase Orders / Requisitions 40 - QSS DEMONSTRATION DISTRICT

File Options Help+Video

Queue Management Requisitions Purchase Orders

Queue Management

Requisitions Waiting for Action

Se	Req#	Vendor	Amount	Date Added	Del By	Subt By	Site	Commodity	PO	App Notes	RQ Notes	AT	Q#	Queue Name
01	502075	Office Depot	25,850.00	03/04/2013		MGR	3035		N	No	No	No	3	ApproverB Queue
00	502076	Office Depot	16,162.50	03/05/2013		MGR	1570		N	No	No	No	1	Implied User
00	502077	Generic Vendor	36.64	11/04/2013		MGR	8155		N	No	No	No	10	ReviewerA Queue
00	502078	Generic Vendor	172.40	11/06/2013		MGR	8155		P	No	Yes	No	2	ApproverA Queue

Select All Clear All

- Check box
- Se
- Req number
- Vendor
- Amount
- Date added
- Del By
- Subt By
- Site
- Commodity code
- PO(status)
- App Notes
- RQ Notes
- NT
- Queue number
- Queue name

Definition of the fields in the grid.

- Check box – Checking this will select the requisition for a queue management action.
- Se – The series number of the requisition. The original series number is always 00. A new series begins when a change is made to the requisition.
- Req number – The requisition number.
- Vendor – Name of the vendor.
- Amount – Total dollar amount of the requisition.
- Date added – The computer's date stamp for when the requisition was created.
- Del By – The deliver-by date from the main requisition form.
- Subt By – The server logon ID of the submitter.
- Site – The site for the requisition.
- Commodity code – The commodity type code for the PO.

Definition of the fields in the grid.

- PO(Status) – This lets us know if the approval stop can be turned into a PO.
 - N or Blank – It can't be turned into a PO at this approval stop.
 - P – It can be turned into a PO at this approval stop. P should show up on the last node as well.
- App note – Approval notes, it will say “Yes” or “No”. This field is a link and will take you directly to the approval notes.
- RQ note – Requisition notes, it will say “Yes” or “No”. This field is a link and will take you directly to the requisition notes.
- NT – A “Y” means there is a note for this requisition, otherwise it will be blank.
- Queue number – The queue number for the requisition. Depending on how your organization has set up the Queue tab, you might have a Queue Legend. If you do, this number will correlate with a number in the Queue Legend that will then give you the queue name, owner of the queue, and whether or not the owner is absent. We have recently added the queue name into the grid so that this feature can be turned off to allow for more room in the grid.
- Queue name – Name of the Queue.

What options are available when on the queue tab

Se	Req#	Vendor	Amount	Date Added	Del By	Subt By	Site	Commodity	PO	App Notes	RQ Notes	AT	Q#	Queue Name
01	502075	Office Depot	25,850.00	03/04/2013		MGR	3035		N	No	No	No	3	ApproverB Queue
00	502076	Office Depot	16,162.50	03/05/2013		MGR	1570		N	No	No	No	1	Implied User
00	502077	Generic Vendor	36.64	11/04/2013		MGR	8155		N	No	No	No	10	ReviewerA Queue
00	502078	Generic Vendor	172.40	11/06/2013		MGR	8155		P	No	Yes	No	2	ApproverA Queue

- Approve
- Approve with a note
- Refer
- Re-route
- Inspect
- View
- Assign PO
- Show
- Cancel
- Set Absence
- Grid output
- Print screen

Definition of the options available when on the queue tab

- Approve – This will approve the requisition/s that you have selected. Once this is done, the requisition will move to the next approval queue.
- Approve with note – Same as approve, except it will open the approval note form for you to add an approval note.
- Refer – If this option is available to you, it will allow you to refer a requisition back to a previous queue.
- Re-route – If this option is available to you, it will allow you to insert or replace a Node and/or entire route. This is a very powerful option that can bypass the normal routing rules. Use this with care.
- Inspect – This will open up the requisition you have selected. If more than one requisition is selected, it will only open the first one.
- View – This opens the PO/REQ quick view form.
- Assign PO – This features bypasses the standard requisition routing rules and allows you to assign a PO immediately. This feature is available only with proper security.

Definition of the options available when on the queue tab

- Show – This opens the requisition status form.
- Cancel – This will cancel the requisition with appropriate security.
- Set Absence – This allows you to mark yourself as absent for a specific date range. If setup properly, this will allow your backup approver to automatically have access to your requisitions to be able to approve.
- Grid output – This will allow you to save everything in the grid to PDF, Word, or Excel.
- Print screen – Standard QSS Print screen function.

Additional Options on the Queue Management tab

Se	Req#	Vendor	Amount	Date Added	Del By	Subt By	Site	Commodity	PO	App Notes	RQ Notes	AT	Q#	Queue Name
01	502075	Office Depot	25,850.00	03/04/2013		MGR	3035		N	No	No	No	3	ApproverB Queue
00	502076	Office Depot	16,162.50	03/05/2013		MGR	1570		N	No	No	No	1	Implied User
00	502077	Generic Vendor	36.64	11/04/2013		MGR	8155		N	No	No	No	10	ReviewerA Queue
00	502078	Generic Vendor	172.40	11/06/2013		MGR	8155		P	No	Yes	No	2	ApproverA Queue

- Settings
- Clear Settings on Exit
- View Attachment
- Show Approved PO's
- Select Processing Queue
- View Users Queue
- Select User Profile

Additional Options on the Queue Management tab

- Settings – You have four options in settings.
 - Account Settings – This allows you to save favorite account code and pseudo codes.
 - Default startup screen – This allows you to choose Queue Management, Requisition, or Purchase Order tab that will be active when you first log on.
 - PO Quick View Settings – This allows you to choose what you want to see when you open a PO Quick View.
 - View Queue Legend – This allows you to turn on or off the Queue Legend.
- Clear Settings on Exit – This will return all your custom settings to the default.
- View Attachments – This will open the attachment form and if the selected requisition has an attachment, you can then view it.
- Show Approved PO's – This will show the most recent approved PO's.
- Select Processing Queue – This option is for Super Users Only. This will allow you to select any other users queue and perform the approval operations.
- View Users Queue – This option is for Super Users Only. This will allow you to select any other users queue and view what is in their queue.
- Select User Profile – This allows a user to have up to three GUIPURCH profiles.