

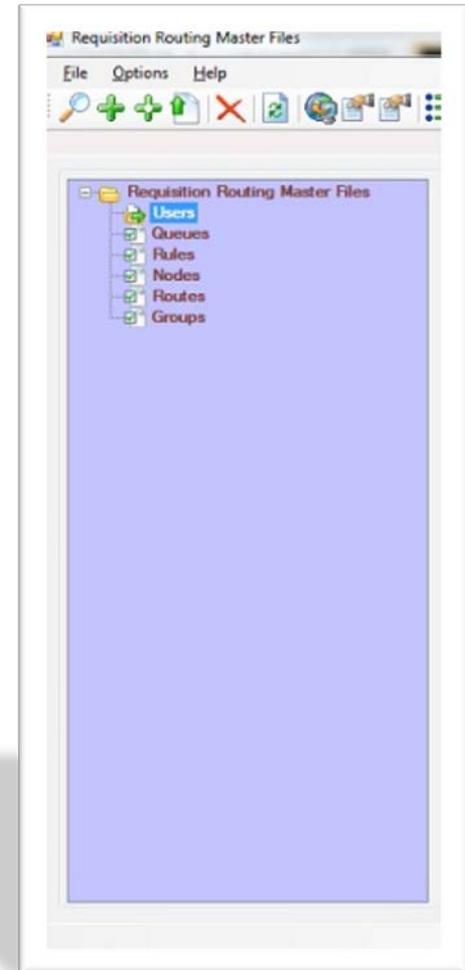
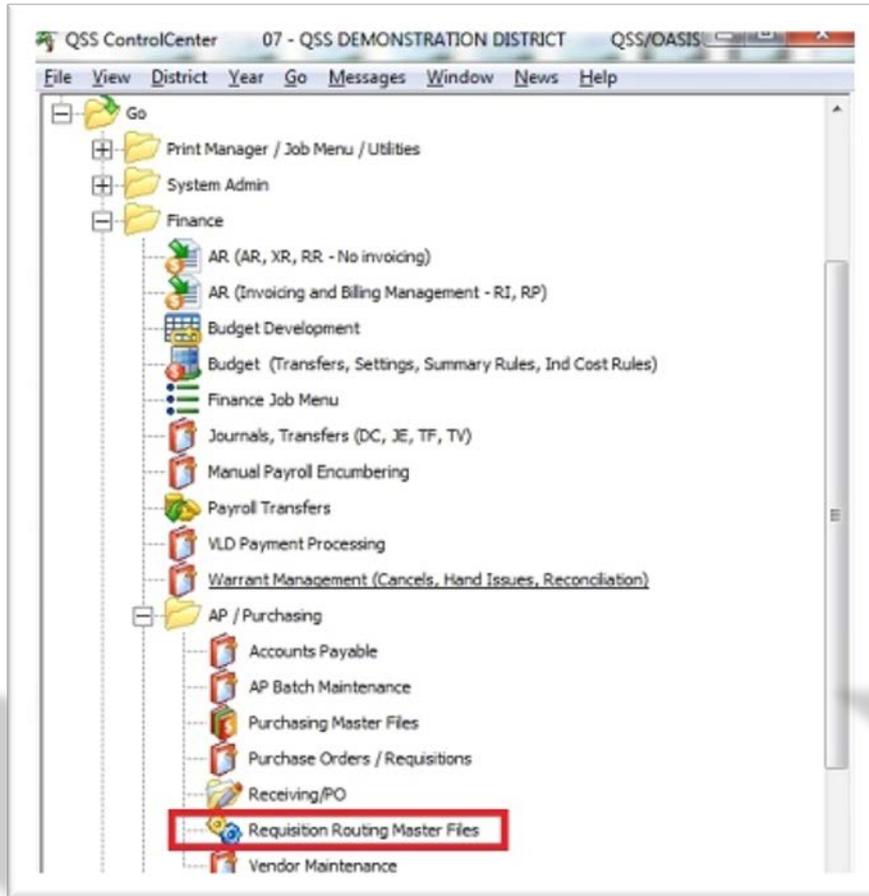
Requisition Routing

In depth look into the structure of
Requisition Routing

Goals for this Presentation

1. *Recreating manual routing and approval processes in QCC*
2. *Understanding the relationship between the various routing master files*
3. *Understanding the available options when defining routing rules*
4. *Tying it all together and rolling it out in QCC*

Clear understanding of the Master files



User Maintenance

Requisition Routing Master Files - User Maintenance

File Navigation

Save Save and Close Close

jharriso, jharrison - District 40

Users: jharriso - jharrison

User: jharriso Name: jharrison

Notify: E - E-Mail E-Mail Address: jharrison@qss.com

Absent: Absence Notify: Return Date: / /

Routing Enabled: Super User: Queue Legend: Display Change Log:

Change Authority: Delete Authority:

User Can Maintain:

Users: Groups: Queues: Nodes: Rules: Routes:

Group ID	Group Name	Primary Flag	Queue ID	Queue Name	Implied Queue Flag	Change Auth.	Delete Auth.
BUDGET	Budget	<input type="checkbox"/>			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Queue ID	Queue Name	Queue Owner	Notification	Approval	Replace Route	Use	App Maximum

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User Maintenance

- User – Choose a QCC user from the drop down list.
- Notify – Allows you to be notified by email when a requisition appears in your queue.
- Absent – Checking this will mark you as absent. However the most common way a User will set themselves absent is to use the “Set Absence” on the Options Menu of the main PO/Req form.
- Absent Notify – checking this will notify other approvers of your queue that you are absent.
- Routing Enabled – This must be checked for the user to have access to Routing.
- Super User – Can select and display waiting requisitions for any routing Queue. Can Re-Route any requisition regardless of re-routing queue security. Ability to approve a Requisition regardless of Queue/User approval settings. Able to change or delete a Requisition regardless of routing user settings.

User Maintenance

- Queue Legend – This enables the Legend when viewing your Queue.
- Display Change Log – Allows the user to show the change log for a selected requisition on the queue management form or from the requisition view form.
- Change Authority – Enables the ability to change a Requisition that is in your Queue.
- Delete Authority – Enables the ability to delete a Requisition that is in your Queue.
- User Can Maintain – These options allow a user to have access to maintain the Master files.
- Implied Queue Flag – This creates an Originator Queue, allowing a user to review and approve a Requisition they enter before it begins the Route.

Queue Maintenance

Requisition Routing Master Files - Queue Maintenance

File Navigation

Save Save and Close Close

Queues : [Dropdown]

Queue : [Text] Name : [Text] Abbreviation : [Text]

Advisory Queue : Auto Approval :

Default Notify : [Dropdown] Default Approval : [Dropdown]

Time-Out Days [Text] Notify Originator on Time-Out : and/or User : [Dropdown] Buyer Code [Dropdown]

	User ID	User Name	Queue Owner	Notification	Approval	Replace Route	Use	App Maximum
*	[Dropdown]	[Text]	[Dropdown]	[Dropdown]	[Dropdown]	[Dropdown]	[Dropdown]	[Text]

Move Row Up Move Row Down Remove Row

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Queue Maintenance

- Advisory Queue – Checking this limits the options allowed for this queue. You can Inspect, approve, and show the status of a requisition. You can also approve with a note. You can't make changes or delete a requisition.
- Auto Approval – If the owner of this queue has already approved a requisition earlier in the route, then this Queue will automatically be approved and move on to the next Queue.
- Default Notify – This allows you to decide how often you are notified that you have a requisition in your Queue. This can be changed on a per User basis.
- Default Approval – This decides the default for who in this Queue can approve the requisitions. This can be changed on a per User basis.
- Time-Out Days – Number of days a requisition sits in a queue with no action taken before a time-out notification is sent.

Queue Maintenance

- Notify Originator on Time-Out – Notifies the originator when a Time-Out occurs.
- And/or User – Notify an additional user when a Time-Out occurs.
- Buyer Code – When a route is examined, the first Queue that has a default Buyer Code will change whatever is on the requisition to that Default Buyer Code. The subsequent queues in the route after the first default buyer code is found are ignored.
- Use & App Maximum – These work in conjunction with one another. If you set the “Use” flag to “Y” or “A”, than the user can only approve requisitions up to the amount entered in App Maximum. “Y” equals yes use it, “A” equals use it if owner is absent, and “N” equals don’t use.

Queue Maintenance

- Replace Route – This gives you many options to insert a Node before or after the current Node. You can also replace an entire Route if you have the appropriate security.
 - Y = Full access to insert and replace
 - N = No access to insert or replace
 - A = Insert Node after the current Node
 - B = Insert Node before the current Node
 - I = Insert Node before or after the current Node
 - R = Replace entire Route

Rule Maintenance

Requisition Routing Master Files - Rule Maintenance

File Options Navigation

Save Save and Close Close

Rules :

Rule : Name : Abbreviation :

Evaluate as : Multiple Account Option :

	Variable	Operator	Low Value	High Value
*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Move Row Up Move Row Down Remove Row

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Rule Maintenance

- Menu Option Account Mask – This allows you to enter up to 20 Account Mask filters per Rule. These Account Masks Filters are “OR” statements. This means that if any of your Account Mask filters come back as true, then it returns the rule as true. NOTE: The Rule on the first page must evaluate as true in order for the Account Mask Filters to be evaluated.
- Evaluate as – You have four options, all variables are true, all variables are false, at least one variable is true, and at least one variable is false. This ONLY applies to the main form, not the Account Masks.
- Multiple Account Option –
 - Standard behavior evaluates all the accounts on the requisition, but the rules need not be all true on just one account. For example: If your rule has both a Fund and Object requirement, the requisition needs to have the fund true on any account line and the Object come back true on any account line.
 - Match all accounts evaluates all the accounts on the requisition and only returns true if all accounts return true for “all” the rules.
 - Match one or more accounts requires the rules to “all” be true on at least one account line.

Rule Maintenance

- Variable – List of fields available to be evaluated.
- Operator – List of “operators” available.
- Low Value – This is an alpha/numeric field.
- High Value – This is an alpha/numeric field. Note: This field is only used when the operator is a range (IB).

Node Maintenance

Requisition Routing Master Files - Node Maintenance

File Navigation

Save Save and Close Close

Previous Node [F5] Add

Nodes :

Node :

Name :

Abbreviation :

Approval Queue :

Rule :

Default Referral :

Inactive in Route : Ignore when Route is evaluated : Assign PO number :

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Node Maintenance

- Approval Queue – When the Rule associated with this Node evaluates as true, this is the Queue it will stop at.
- Rule – This is the Rule that is evaluated when the Requisition reaches this Node.
- Default Referral – If the user has the appropriate security, this is the default method for how a requisition is treated when the “Refer” option is used. This can be changed on a per Node basis within the Route.
- Inactive in Route – When this is enabled, any requisition that is created will ignore this Node

Node Maintenance

- Ignore when Route is evaluated – When this is enabled, it will evaluate when a requisition is FIRST created, any changes or re-routes that happen after the requisition is created will ignore this Node.
- Assign PO number – If this option is enabled, and the user has the appropriate security, and the requisition is currently on this approval Node a PO number can be assigned using the “Assign PO” menu option. When “Assign PO” is used in this fashion, any subsequent stops in the route will skipped and the Requisition will immediately become a PO.

Route Maintenance

Requisition Routing Master Files - Route Maintenance

File Navigation

Save Save and Close Close

Routes : [Dropdown]

Route : [Text] Name : [Text] Abbreviation : [Text]

ONLY for Group : [Dropdown] [Yellow Highlighted Area]

	Node ID	Node Description	Referred
*	[Dropdown]	[Text]	[Dropdown]

Move Row Up Move Row Down Remove Row

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Route Maintenance

- ONLY for Group – As the name applies is only useable for the specific Group.
- Node ID – You can add as many Nodes as you need. When a Requisition is evaluated it starts from the top and works it's way down, evaluating each Node and creating an approval route.
- Referred – The default is set in the Node, this can be overridden here.
- Global Beginning Route –These can be accessed from the main Req/Routing Form by selecting “Global Routes” under the Options Menu.
- Global Ending Route – These can be accessed from the main Req/Routing Form by selecting “Global Routes” under the Options Menu.

Group Maintenance

Requisition Routing Master Files - Group Maintenance

File Navigation

Save Save and Close Close

Groups :

Group : Name : Abbreviation :

Default Queue : Disable Beginning Global Route Disable Ending Global Route

	User ID	User Name	Primary Flag	Queue ID	Queue Name	Implied Queue Flag	Change Authority	Delete Authority
*	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Route ID	Route Name
*	<input type="text"/>	<input type="text"/>

Move Row Up Move Row Down Remove Row

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Group Maintenance

- Default Queue – If in the Node you select “\$GROUP” as the approval Queue, then it would look at this setting and use that Queue as the approval Queue.
- Disable Beginning /Ending Global Route –This option EXCLUDES the global beginning or global ending routes from the group's route path when a requisition's route is created. If you invoke this option you must then select the Route you want to use in the Bottom of this form.
- Primary Flag – If a user is associated with multiple Groups, this will let you define which group will be the default when a new Requisition is created. You can always change the routing group within the Requisition.

Master File Relationships

- In order for a route to work correctly, the Master files must be set up correctly. Here are a few things to remember.
 - Before you can add a user to the Requisition Master files you must have already created that user's QCC account and given them the proper user security.
 - When first setting up your Requisition and Routing Master files, be sure to have already decided how you are going to organize your Routing Queues, Nodes, Rules, Routes, and Groups. A good rule of thumb might be to write down your processes and create a physical document you can refer back to.
 - This includes a naming convention so that it will be easy to identify the purpose of the Queue, Rule, Node, Route, and Group.
 - Decide not only who the approvers will be but who the back up approvers will be.
 - Figure out what the most common Requisition approval scenario is and build your initial designs around that.
 - In the beginning before you have created many routes it is easy to make changes and/or delete Queues, Rules, Nodes, Routes, and Groups. Be sure you analyze the process before you create too many of these Master files, the farther into the process the harder it is to stop and change it all.

Master File Relationships

- Queues are the places a Requisition stops and waits for approval before moving on. You can have as little as one user associated with a Queue or you can have multiple users able to approve. You can set it up so that there is only one owner of the Queue but many additional approvers if, for example, the owner is marked absent.
- Rules determine what Queue/s a Requisition will go to. You can have as many rules as you like.
- Nodes are what associate a Queue with a Rule. You will need a Node for every Rule you want to use.
- Routes allow you to choose as many Nodes as you want.
- Groups are made up of Routes, which are made up of Nodes, which associates a Queue with a Rule. The User only has the ability to select a group (if more than one is available to the User) when a Requisition is created.

Show Route (Basic)

Requisition Routing Master Files - Show Route

File

Close

Selection

User : MGR Default QSS User Group : GroupA Group A Display

- Route: GLOB-BEG - Global Beginning Route
 - Global Beginning
 - Node: ORIGINATOR - Originator of Requisition
 - Node: Group - Group
 - Route: GLOB-END - Global Ending Route
 - Global Ending
 - Node: DirTech - Director of Technology Node
 - Node: AsstSupES - Asst Supt Educ Svcs Node
 - Node: AsstSupSSS - Asst Supt SSS Node
 - Node: AsstSupSSS2 - Asst Supt SSS #2 Node
 - Node: BelowAmt500 - BelowAmt500 Node
 - Node: AboveAmt500 - AboveAmt500 Node
 - Node: AP-CONTRLR - Approval by Controller
 - Node: AP-CBO - Approval by CBO

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Eval Route (Basic)

Requisition Routing Master Files - Evaluate Route

File

Close

Selection

User : MGR Default QSS User Group : GroupA Group A

Number : 502064 Type : Requisition Year : 10 Display

Number : 502064 Description : Amount : \$10.78

	Series	Sequence	Suffix	Queue	Queue Description	Referral	Status
▶	00	01	00	MGR	**Implied User Queue**		W
	00	02	00	ReviewA	ReviewerA Queue	S	
	00	03	00	ApproveA	ApproverA Queue	S	

Yr: 2010 Dist: 40 Site: 0 11:23:37 AM 1/4/2013

Basic Route Example

- UserA enters a Requisition for a box of paper.
 - The system will now Build the approval Route based on the Rules that have been previously created. When a route is built it is given a “Series” number starting with 1. This is how the system knows when a change or re-route has been done . Every time a change or re-route occurs it re-creates the route and adds 1 to the series number. So the first time a change is made, the new series number would be 2, then 3, and so forth.
 - After the Requisition is entered, the system can be set up to either auto approve the Requisition and move on to the next Queue, or can immediately stop and the Originator may have a chance to review and approve the Requisition first.
 - If you want the Originator to always have a chance to review and approve a Requisition then, check the Implied Queue Flag in the User Maintenance Master File.
 - Because the Route has now already been built, you can view what the route is by going to the Requisition using the search feature to inspect the Requisition. Once there you can either use the Menu “Options” or the Tool Bar “Options” and go to Requisition Status. A form will be displayed with all the approval Queues and even show you exactly what Queue the Requisition is currently at.
 - A basic Beginning route would have a new Requisition stop at a reviewers Queue.
 - For example: a Teacher enters a Requisition for a box of pencils. The first stop might be the Principal’s Secretary who reviews all the orders and makes sure it is correct before moving on to the Principal’s approval Queue.

Basic Route Example

- The next stop might be the Administrator of the department or site.
 - Now that the Principal's Secretary has made any necessary changes and approves the Requisitions it moves to the Principal's Queue which he then would decide to approve or not. This would conclude the Beginning route and now move on to the Ending Route.

- A basic Ending route might start with the Budget Department.
 - Now that the order for a box of pencils has been fully approved by the site it moves along the route to the Budget department. They confirm the site has the appropriate funds and is using the correct account code and approves the Requisition.

- Next the Requisition ends up at the Purchasing department.
 - A Purchasing clerk reviews the Requisition and makes sure the vendor information is correct and makes any adjustments to the order and approves the Requisition.

- Finally the Purchasing Director/Admin approves the Requisition and it becomes a PO.

Requisition Status (Basic)

Purchase Orders / Requisitions 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options

Close View Notes

Requisition Number: 502064 Group: GroupA Group A

Ser	Seq	Suf	Queue	Rule	User	Date	Time	Status
00	01	00	MGR	\$AUTO		01/04/2013	9:42a	W
00	02	00	ReviewA	\$AUTO				
00	03	00	ApproveA	BelowAmt500				

Show History Show Approvers Show Change Log

Assigned PO#: Printed: Times Printed:

Yr: 2010 Dist: 40 Site: 0 GS: W 1/4/2013 11:32:44 AM

Intermediate Route Example

- UserB creates a Requisition for 10 new Apple Laptop computers.
 - This is a Title II school and this purchase requires the approval of the Technology Department.
 - The Beginning route for the Intermediate example would be the same as the Basic route example.
 - Because this Requisition has a Title II account code, a Technology item is being purchased, and the Requisition dollar amount is over 5,000.00 there will be three additional approvals required in the Ending route.
 - The first stop on the Ending route for this Requisition would be the Technology approval Queue.
 - The Technology department would review and approve the Requisition.

Intermediate Route Example

- The second stop would be the Director or Program manager for Title II funds.
 - The Director or Program manager would review and approve the Requisition.
- The next few approvals would be the same as the Basic route example.
 - The Budget, Purchasing, and Purchasing Director all review and approve this Requisition. One final approval could be needed because of the dollar amount of the Requisition. In this example we would need an additional approval from an Administrator who has a higher dollar limit than the Purchasing Director to make the final approval. An example of a common hierarchy would be Purchasing Director, Controller, CBO, Assistant Superintendent, and Superintendent. Each could have a predefined approval limit.

Requisition Status (Intermediate)

Purchase Orders / Requisitions 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options

Close View Notes

Requisition Number: 502068 Group: GroupA Group A

Ser	Seq	Suf	Queue	Rule	User	Date	Time	Status
00	01	00	MGR	\$AUTO		01/04/2013	11:42a	W
00	02	00	ReviewA	\$AUTO				
00	03	00	DirTech	TechVen1				
00	04	00	AsstSupES	AsstSupES				
00	05	00	ApproveB	AboveAmt500				
00	06	00	CONTROLLER	AP-CONTRLR				

Show History Show Approvers Show Change Log

Assigned PO#: Printed: Times Printed:

Yr: 2010 Dist: 40 Site: 0 GS: W 1/4/2013 11:49:55 AM

Advanced Route Example

- UserC creates a Requisition for 17 computers, 17 filing cabinets, 17 projectors.
 - Sometimes the Beginning route needs to be more robust. In this example the Assistant Superintendent of Secondary Education wants to supply a High School with some new equipment.
 - The Originator in this example is the Administrative Assistant for the Assistant Superintendent. She/he enters the Requisition, reviews, and approves it.
 - Normally it would then go the department head for a final approval before starting the Ending route, but in this example the Assistant Superintendent has two Program Coordinators that She/he has given access to review and approve specific Requisitions based on School site.
 - In the Rules Maintenance setup we would have created two additional rules in the Beginning route. One for Sites A-M and another for Sites N-Z.
 - In this example the Site will have fallen into the N-Z category and so that Program Coordinator will be the one to receive this Requisition in her Queue.
 - Now that the Requisition is routed to the appropriate Queue it can be reviewed and approved. Normally this would now be the end of the Beginning route, but because of the dollar amount, the Assistant Superintendent needs to also review and approve it.

Advanced Route Example

- The first stop on the Ending route for this Requisition would be the Technology approval Queue.
 - The Technology department has decided to make a change to the type of computers being ordered to match the Districts current standards and then approves the Requisition.
- The second stop goes to the Budget department.
 - The account code used doesn't have enough funds and so they make a change to the Requisition and approve it.
- The third stop is the Purchasing department.
 - As they were reviewing this requisition they found out that the Filing cabinets are discontinued. The Purchasing department finds another similar model, makes the changes to the Requisition and approves it.
- The fourth stop is the Purchasing Director.
 - The Purchasing Director happens to be absent, the Controller is a back up approver and so this Requisition automatically gives access to the Controller to review and approve.
- The fifth stop would be determined on the total dollar amount of the Requisition.
 - The Requisition ends up being over 50,000.00 and so goes to the CBO to review and approve.

Requisition Status (Advanced)

Purchase Orders / Requisitions 40 - QSS DEMONSTRATION DISTRICT QSS/OASIS

File Options

Close [Navigation Icons] View Notes

Requisition Number: 502070 Group: GroupA GroupA

Ser	Seq	Suf	Queue	Rule	User	Date	Time	Status
00	01	00	userA	\$AUTO	userA	01/04/2013	2:48p	A
Please expedite this order!!								
00	02	00	ReviewA	\$AUTO	reviewA	01/04/2013	2:51p	A
00	03	00	DirTech	TechVen1	approveC	01/04/2013	3:05p	A
00	04	00	AsstSupSSS	AsstSuptSSS	approveB	01/04/2013	3:08p	A
00	05	00	AsstSupSSS	AsstSupSSS2	**AUTO**	01/04/2013	3:08p	A
00	06	00	ApproveB	AboveAmt500	approveB	01/04/2013	3:10p	A
00	07	00	CBO	AP-CBO	approveC	01/04/2013	3:11p	R
I would like to order the Filing cabinets at a later date. Please remove.								
01	01	00	userA	\$AUTO		01/04/2013	3:11p	W
01	02	00	ReviewA	\$AUTO				
01	03	00	DirTech	TechVen1				
01	04	00	AsstSupSSS	AsstSuptSSS				
01	05	00	AsstSupSSS					
01	06	00	ApproveB					
01	07	00	CBO					

Show History Show Approvers Show Change Log

Assigned PO#: Printed: Times Printed:

Yr: 2010 Dist: 40 Site: 0 GS: W 1/4/2013 3:18:47 PM