



HARRIS
School Solutions

QSSUG
Purchasing, Stores, Fixed Assets
Committee

*Requisition Routing – Initial Setup
and Security Options
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Requisition Routing Introduction

- A requisition is a document requesting the purchase of goods or services
- This has always been a very paper intensive process, having many bottlenecks in the approval process
- The electronic routing of requisitions cuts down on both the high amounts of paper and many of the approval bottlenecks

Requisition Routing Introduction

- Before your organization moves to electronic requisition routing, we suggest having a few items beforehand:
 - Documentation of your current process
 - Note all the different approval positions and the people that would back them up
 - We recommend starting with a single department as a test of the routing implementation process
 - Start with simple routing plan, then build a more complicated routing structure as you learn more

Requisition Routing Introduction

- User – Enters, reviews, and approves Requisitions
- Group – Collection of users
- Queue – A stopping point for a requisition to be reviewed and approved (“Inbox”)
- Rule – A trigger that causes the requisition to stop at a queue to be reviewed and approved
- Node – The combination of a queue and a rule
- Route – Collection of nodes

Requisition Routing Introduction

A user enters a requisition.

A route is created based on the user who entered the requisition.

The route then evaluates the requisition and creates approval queues based on the rules that are established.

The requisition starts at the first approval queue and waits to be approved, once approved this process is repeated at every approval queue until it makes its way to the final approval queue.

When this last approval is made, the requisition becomes a PO.

User Security for Routing

- Found in the GS57 MTUS Manual on these pages:

- **RQR010MU** (2-318) – Master user that must be in place so you can define master files
- **RQRCTL** (2-310) – Automatic re-routing of requisitions
- **GUIPURCH** (2-286) – Access to tabs on PO/Req window, set up options for each
- **PXENCM** (2-300) – Set-up options for the Requisitions tab
- **PXENCMRU** (2-303) – Autonumbering of requisitions for sites that are phasing in requisition routing
- **PXENCD** (2-298) – Options for Req tab, cancellations, dates for copying Reqs, draft mode, add req w/o acct
- **POXBUYER** (2-318) – Allowing inactive buyers to route purchase orders
- **RQR010** (2-318) – Upshifting code values for master files
- **PXSITE** (2-304) – sites to which remote administrators have access
- **RQRFIX** (2-306) – Enables fix of requisition's route that lost its current Waiting node (version L only)
- **RQRQMG** (2-306) – Options for routing and approving requisitions

RQR010MU

Table 2-258: RQR010MU user security for the RQR module

COL	CONTROLS	DESCRIPTION
01 - 08	First master user	The server user associated with the QCC user who is the master user. Type the server user left justified and leave spaces for a name shorter than 8 characters.
09	Ability to change districts	Y for yes or N for no
10	Leave blank	Space to separate the options
11 - 18	Second master user	A server user up to 8 characters long
19	Ability to change districts	Y for yes or N for no
20	Leave blank	Space to separate the options
21 - 28	Third master user	A server user up to 8 characters long
29	Ability to change districts	Y for yes or N for no
30	Leave blank	Space to separate the options
31 - 38	Fourth master user	A server user up to 8 characters long
39	Ability to change districts	Y for yes or N for no
40	Leave blank	Space to separate the options
41 - 48	Fifth master user	A server user up to 8 characters long
49	Ability to change districts	Y for yes or N for no
50	Leave blank	Space to separate the options
51 - 58	Sixth master user	A server user up to 8 characters long
59	Ability to change districts	Y for yes or N for no
60	Leave blank	Space to separate the options

RQRCTL

Table 2-254: RQRCTL USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01	Rerouting of requisitions	<p>N Turn off automatic rerouting once a requisition has been rerouted (default).</p> <p>Y Force the software to reroute requisitions after they have been rerouted. Use this setting to implement PSFA projects PU-10-10, PU-10-11, and PU-10-12.</p>
02	Disabling email notifications	<p>N Allow email notifications for routing (default).</p> <p>Y Disable email notifications for all routing users.</p>
03	Screening out duplicates	<p>N Disabled (default). Send duplicate messages if the same email address is in a distribution list two or more times.</p> <p>Y Screen out duplicates in a distribution list.</p>
04 - 60	Not used	Leave blank.

GUIPURCH

Table 2-226: GUIPURCH USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01	Access to Queue Management tab	<p>N The tab does not display in the <i>Purchase Orders / Requisitions</i> window (default).</p> <p>Y Display the tab if the user is set up for requisition routing. For the tab to display, a user must be set up in the Users master file in the <i>Requisition Routing Master Files</i> window and be set up as a remote user (setting of 5, 6, or 7 for the active user profile in col 09, 20, or 26).</p>
02	Access to Requisitions tab	<p>Y Display the tab (default).</p> <p>N Do not display the tab.</p>
03	Access to Purchase Orders tab	<p>Y Display the tab (default).</p> <p>N Do not display the tab.</p>
04	Active tab when the window opens	<p>R Requisitions (default).</p> <p>P Purchase Orders.</p> <p>Q Queue Management.</p>
<p>Columns 05 - 10 allow you to define user profile 1 for the Requisitions tab. This profile is required. You can also define two optional profiles in columns 15 - 20 and 21 - 26. Users can select these profiles on the Requisitions tab with the Select User Profile command on the Options menu.</p>		
05	Approval options	<p>0 Calculate the approval status of requisitions (default). This option will cause POs that exceed the threshold for board approval to be unapproved. The default threshold is set in PXENCM program option (page 2-308) and overridden in the POXBLIM user security record (page 2-296).</p> <p>1 Approve all requisitions.</p> <p>2 Force the PO approval flag to no. You can use this setting in combination with the POX400 user security to force the approval flag to yes when printing requisitions (page 2-245).</p> <p>Column 05 applies to approvals made on the Requisitions tab of the <i>Purchase Orders / Requisitions</i> window. It does not apply to the approval process on the optional Routing tab.</p>
06	Requisition approval	<p>0 Cannot approve requisitions (default).</p> <p>1 Cannot unapprove a requisition.</p> <p>2 Cannot unapprove a requisition, but can assign a PO number to a remote requisition.</p> <p>3 Can unapprove a requisition and assign a PO number to a remote requisition.</p>
07	Budget and board approval	<p>0 Cannot change budget and board approval flags (default).</p> <p>1 Can change budget approval flags.</p> <p>2 Can change board approval flags.</p> <p>3 Can change both budget and board approval flags.</p>

GUIPURCH - Continued

Table 2-226: GUIPURCH USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
08	Release to purchasing, odometer for PO numbers, and inspect only access	<ol style="list-style-type: none"> 1 Cannot change released to purchasing flag. 2 Can change released to purchasing flag. 3 Inspect only access to requisitions. Do not allow adding requisitions. 4 Clerk user (remote user). 5 Cannot change released to purchasing flag. Disable PO odometer. 6 Can change released to purchasing flag. Disable PO odometer. 7 Disable PO odometer.
09	Remote site approval and site access	<ol style="list-style-type: none"> 0 Disabled (default). 1 Old style remote limited to logon site. PO number is invisible. 2 Old style remote limited to logon site. PO number is visible. 3 Access to any site in district. 4 Access to any site in district. Allow resetting of PO print date. 5 Remote user (clerk). 6 Remote user with ability to sign off and hold remote requisitions (administrator). 7 Remote user who can reset the print date for requisitions. <p>For options 5, 6, and 7 (remote user), two other statements must be true for the Requisitions tab to display. First, col 01 must be Y. Second, the user must be present in the Users master file for Requisition Routing.</p> <p>Options 0 through 2 and 5 through 7 block access to requisitions from sites other than the logon site. When you search on the grid in the <i>Purchase Orders / Requisitions</i> window, requisitions for other sites display in the search results. However, the <i>Requisition Entry</i> dialog box displays the following message when you double-click a requisition from a different site: "You are not authorized to view Requisitions from this site."</p> <p>For sites that are using Requisition Routing, set up a user with a 5 or 6 in column 09 to make the Routing Group box display on the Requisitions tab of the <i>Purchase Orders / Requisitions</i> window. The Routing Group box displays the groups that are set up for each user in the <i>Requisition Routing Master Files</i> window for which routing is enabled in the Users master file.</p>
10	Not used	<p>Leave blank. Reserved for automatic preset assignment in requisitions.</p> <p>Columns 11 and 12 allow you to define options for the Purchase Orders tab.</p>
11	Ability to extend purchase orders	<p>N Disabled (default). Y On the Purchase Orders tab, allow access to the Extend Purchase Order command for adding or changing accounts.</p>

GUIPURCH - Continued

Table 2-226: GUIPURCH USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
12	Ability to change POs	N Disabled (default). Y On the Purchase Orders tab, allow access to the Change Purchase Orders command for changing unpaid POs.
13	Access to Control # box	FOR VERSION L ONLY N Do not allow typing in the Control # box, which is on the top row of the <i>Requisition Entry</i> dialog box (default). O Typing in the Control # box is optional R Require an entry in the Control # box. (If you previously defined a Y in col 13, it has the same effect as R.) This column has no effect for Version H.
14	Inspect-only access	N For the Purchase Orders tab, enable adding POs if allowed by other user or task security (default). Y Enforce inspect-only access regardless of other security.
15	Whether to activate user profile 2	N Do not activate (default). Y Activate the profile. Users can select this profile on the Requisitions tab with the Select User Profile command on the <u>O</u> ptions menu.
16 - 20	Permissions for user profile 2	If you have activated profile 2, define its permissions. • For column 16, see the instructions for column 05. • For column 17, see the instructions for column 06. • For column 18, see the instructions for column 07. • For column 19, see the instructions for column 08. • For column 20, see the instructions for column 09.
21	Whether to activate user profile 3	N Do not activate (default). Y Activate the profile. Users can select this profile on the Requisitions tab with the Select User Profile command on the <u>O</u> ptions menu.
22 - 26	Permissions for user profile 3	If you have activated profile 3, define its permissions. • For column 22, see the instructions for column 05. • For column 23, see the instructions for column 06. • For column 24, see the instructions for column 07. • For column 25, see the instructions for column 08. • For column 26, see the instructions for column 09.
27	Warning before assigning a PO number manually'	N No warning (default). The Approve PO command on the Queue Management assigns PO numbers without any warning. Y Warning. The system issues a warning when you use the Assign PO command. This option was added to discourage accidental assignment of PO numbers before a requisition finishes its approval route.

GUIPURCH - Continued

Table 2-226: GUIPURCH USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
28	Default entry mode for accounts	<p>A Account mode (default). You can type only the digits 0 through 9.</p> <p>P Pseudocode mode. The presets between the account fields do not display. You can type both letters and numbers.</p> <p>You can toggle pseudocode mode on or off by pressing the SLASH key above the numeric keypad.</p>
29	Notepad for requisitions	<p>FOR VERSION H</p> <p>N Disable search for notes attached to requisitions (default).</p> <p>Y Enable search for notes.</p> <p>FOR VERSION L</p> <p>Y Enable the search for notes attached to requisitions (default).</p> <p>N Disable search for notes.</p> <p>For Version H, the enhanced search for notes is disabled by default to speed up the search. You can explicitly enable searching notes.</p> <p>For version L, the default is to enable the enhanced search it goes much faster on Version L.</p>
30	Access to View PDF Files command	<p>FOR VERSION L ONLY</p> <p>0 Do not enable (default).</p> <p>1 PO Forms only.</p> <p>2 Change Order forms only.</p> <p>3 Both PO and Change Order forms.</p>
31	Uniqueness of Control #	<p>U The Control # must be unique (default).</p> <p>A You can enter any value in the Control #.</p>
32 - 60	Not used	Leave blank.

PXENCM

Table 2-242: PXENCM USERSEC parameters for the REQS module

COL	CONTROLS		DESCRIPTION
01	Balance checking for users who are not remote and have access to all sites	blank	Use default setting from Account Structure (GLMT02) tab on the <i>General Ledger Maintenance</i> window. The Online Account Balancing list displays the default for a district and year. For details, see Chapter 3 of the <i>QCC Core Financial Manual</i> .
		H	Hard balance checking (error message).
		S	Soft balance checking (warning message).
		N	No balance checking.
02	Balance checking for users who have access to a limited number of sites	blank	Use default setting from Account Structure (GLMT02) tab on the <i>General Ledger Maintenance</i> window.
		H	Hard balance checking (error message).
		S	Soft balance checking (warning message).
		N	No balance checking.
03	Balance checking for users who are configured as remote (clerk or administrator)	blank	Use default setting from Account Structure (GLMT02) tab on the <i>General Ledger Maintenance</i> window.
		H	Hard balance checking (error message).
		S	Soft balance checking (warning message).
		N	No balance checking.
04 - 07	Preset buyer code		Any value. Used to preset buyer code in ADD mode.

PXENCM – Continued

Table 2-242: PXENCM USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
08	Maximum confirmation message numbers	0 - 9. These numbers can be used to print confirmation notes on POs in order to prevent duplication of orders. These are optional. If used, they are defined by the system administrator.
09	Preset Approval flag	Y Preset to Y (Yes). N Preset to N (No). Used to preset the approval flag for the 'ADD' options. The corresponding field on the input screen is labeled Release .
10	Force logic to check the setting of approval flag even when menu options indicate otherwise	N or blank No. Y = Yes.
11	Preset Subject to Tax flag	N or blank Preset to N (No). Y Preset to Y (Yes).
12 - 15	Preset Shipping Address	0000-9999. Used to preset the shipping address code when adding a new requisition. The default is '0000'.
16	Allow remote user to enter stock number	Y Remote clerk/administrator can enter stock numbers. N Remote clerk/administrator cannot enter stock numbers.
17	Preset Autonumber PO field on the Assign PO Number to Remote Requisition Screen	Y Preset to Y (Yes). N Preset to N (No).
18	Preset confirmation message code number	Enter the desired preset value of blank or 0 - 9. The number entered here should not be greater than the value entered in position 8. This is the default value that will appear in the Confirm Msg field when adding POs with PXENCM.
19	Allow creation of STORES Orders	Y Yes. N No.
20 - 21	Default warehouse number	blanks or 00-99
22 - 31	Valid warehouses for STORES Orders	blanks any warehouse Up to 5 warehouse numbers (2 digits each), to limit access to only these warehouses.
32	Auto-number PO when creating STORES Order	Y Yes. N No.
33	Auto-number STORES Order	Y Yes. N No.

PXENCM – Continued

Table 2-242: PXENCM USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
34	Use common odometer for POs and STORES Orders	Y Yes. N No. If this is set to 'Y,' the LP odometer must be in place. For instructions, see page 2-368 .
35	Check buyer code against master file	N No (default). In the <i>Requisition Entry</i> dialog box, the Buyer box is a free-form text box. Y Yes. The Buyer box is a drop-down list that displays the contents of the Buyer Codes (BUYR) master file.
36	Check PO type against master file	N No (default). In the <i>Requisition Entry</i> dialog box, the PO Type box is a free-form text box. Y Yes. The PO Type box is a drop-down list that displays the contents of the Purchase Order Types (PO) master file.
37 - 38	Preset PO Type	Blanks or PO Type preset
39	Special character for Message Library processing.	Leave blank for no message library, or enter a special character. The @ or the = sign is suggested. This will be used to import frequently used messages into the line item description field.
40 - 49	Warehouses to disable auto-numbering	blanks none Up to 5 warehouse numbers (2 digits each), to limit access to only these warehouses.
50	Edit site number against the Locations (LOC) master file.	Y Yes. N No. The <i>HR Code Maintenance</i> allows you to maintain the LOC master file.
51	Disable the 'Delete Req/PO' option if PO has been printed	Y Yes. N No.
52	Override automatically set Fixed Assets flag	Y Yes. N No. This is not implemented as of February 2003.
53	Activate Exit Confirmation feature.	Not applicable to QCC. This parameter applies to the F8 key for closing a screen in the traditional software.
54	For the SD (Special Dollar) split code, calculate split amounts using the base amount <i>plus</i> tax.	Y Yes. Calculate splits with tax included. This changes the way the SD split code normally works. N No. Calculate the normal way. Do not include tax unless specified by user.

PXENCM – Continued and PXENCMRU

Table 2-242: PXENCM USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
55	Commodity code required	N No. Y Yes.
56 - 59	Default unit of issue	Leave blank for none (default). To specify a default, type a unit up to 4 characters long.
60	Shipping item required	N Not required (default). Y A requisition must have at least one shipping item and an amount of one cent or more.

Table 2-243: PXENCMRU parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01 - 02	Odometer to use	Type a 2-character code for the odometer to use for auto-numbering requisitions. Define this odometer, as described in "Odometers for Autonumbering Transactions" on page 2-368 .
03 - 60	Not used	Leave blank

PXENCD

Table 2-241: PXENCD USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01	Remote site override	<p>N On the Requisitions tab, honor the restrictions on sites that users can access in the PXSITE user security on page 2-304 (default).</p> <p>Y Allow access to any site, even if PXSITE is defined.</p>
02	Changing and deleting remote requisitions	<p>N Do not allow changing or deleting a requisition that has been assigned a PO number (default).</p> <p>Y Allow changing and deleting a requisition after it has been assigned a PO number.</p> <p>Column 02 applies only to users that are set up as remote users (options 5, 6, or 7 in column 09 of GUIPURCH on page 2-287). The system ignores this flag for those who are not remote users.</p>
03	Cancel is delete flag	<p>N Allow deleting an unpaid line item on requisitions (default).</p> <p>Y Do not delete a requisition, but cancel it. When you select the option to delete a requisition, the system redirects to the cancellation option. You cannot cancel a requisition once a PO number is assigned because the cancellation is only for requisitions that haven't been turned into a PO.</p> <p>Customers operating in this mode cancel a requisition or PO with POCO.</p>
04	Date for copying requisitions	<p>N When copying a requisition, the system sets the date added to the date for the source requisition (default).</p> <p>Y For a copied requisition, the date added is the date on which the requisition was copied.</p>

PXENCD – Continued

Table 2-241: PXENCD USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
05 - 06	Default split for line items	<p>CPCalculate Percentage. The system calculates the dollar amount to charge each account based on the Percent in the Accounts list.</p> <p>SPSpecial Percentage. In the Accounts area, type the Item Percent for each account, then the system computes the dollar amount.</p> <p>SDSpecial Dollar. in the Accounts Area, type the Item Amount to charge to each account.</p> <p>XXAccount Line XX. Replace the XX with an account number, such as 03 for account number 3.</p>
07	No preload of site	<p>N Preload (default).When adding a requisition, pre-load the Site with the logon site.</p> <p>Y No preload. When adding a requisition, blank out the Site box. You must select a site for each requisition before adding. This option was added to decrease data entry errors for clerks who enter requisitions for many sites.</p>
08	Override autonumbering of POs for remote users	<p>N Do not allow override (default).</p> <p>Y Allow overrides.</p> <p>An Override check box that allows manual assignment of a PO number displays if the following is true for profile 1.</p> <ul style="list-style-type: none"> ◆ The user is adding a requisition. ◆ The user is NOT a remote entry user. GUIPURCH Byte 9 of is NOT 5, 6, or 7. ◆ The odometer for PO numbers is set up. Byte 8 of is NOT 5, 6, or 7. <p>This user security also works when you select profile 2 or 3 in bytes 15 or 21 of GUIPURCH. For profile 2, the applicable bytes in GUIPURCH are 19 and 20. For profile 3, they are 25 and 26.</p>
09	Preloading of Ship To box	<p>N No preload (default). Select shipping location 0000.</p> <p>Y Preload with the site for the user's logon site.</p>
10	Adding a requisition without accounts	<p>N Disabled (default).</p> <p>Y Enabled.</p>
11	Disabling of [Save Draft] button	<p>N Enabled for adding or changing requisitions (default).</p> <p>Y Disabled.</p>
12	Default for Tax list for line items	<p>N When the Print flag for a line item is Ship/Freight, the default for he Tax list is No.</p> <p>Y The default for the Tax list is Yes.</p>
13 - 18	Preset vendor number for remote requisitions	<p>blank Keep 999999 as the preset default.</p> <p>000000 No default. Do not pre-fill with 000000.</p> <p>xxxxxx Type any other number to specify a default vendor number to use. Type all 6 digits, such as 004103 for vendor 4103.</p>

PXENCD – Continued

Table 2-241: PXENCD USERSEC parameters for the REQS module - continued

COL	CONTROLS	DESCRIPTION
19	Linkage to Stores System	N Disabled (default). Y Allow linkage to Stores System for the QCC version of Purchasing.
20	Preset for buyer code when copying a requisition	N Not preset the buyer code (default). Y Use the buyer code in col 04-07 as the preset buyer code for the copied requisition.
21	Blocking the ability to add requisitions	N Not blocked (default). Adding is allowed. Y Prevent adding requisitions. This option blocks the ability to add requisitions for remote users who are not part of a routing group and to disable copying. For example, this option blocks an approver who can change and approve requisitions from also copying (adding from) them.
22 - 60	Not used	Leave blank

POXBUYER and RQR010

Table 2-256: POXBUYER user security for the RQR module

COL	CONTROLS	DESCRIPTION
01	Checking of inactive flag for buyers	0 The system does not check whether a buyer is active. PO Routing allows you to use inactive buyers (default). 1 Do not allow using inactive buyer codes for routing POs.
02 - 60	Not used	Leave blank.

Table 2-257: RQR010 user security for the RQR module

COL	CONTROLS	DESCRIPTION
01	Upshifting of code values	N Do not upshift (default). Y Upshift code values.
02 - 60	Not used	Leave blank

PXSITE

Table 2-244: PXSITE USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01 - 04	Remote site #1	<p>Type up to 15 sites to specify the locations to which remote administrators and users have access. Type each site as a 4-digit number, such as 0035 for site 35.</p> <p>This user security applies to the following modules:</p> <ul style="list-style-type: none"> • POXRR series (Remote Requisition Prelist) • POX500 series (Purchase Order Prelist) • POPRT series (Extract/Print/Update Purchase Orders) • Requisitions tab for the <i>Purchase Orders / Requisitions</i> window if you do not override PXSITE with the PXENCD user security on page 2-298.
05 - 08	Remote site #2	
09 - 12	Remote site #3	
13 - 16	Remote site #4	
15 - 20	Remote site #5	
21 - 24	Remote site #6	
25 - 28	Remote site #7	
29 - 32	Remote site #8	
33 - 36	Remote site #9	
37 - 40	Remote site #10	
41 - 44	Remote site #11	
45 - 48	Remote site #12	
49 - 52	Remote site #13	
53 - 56	Remote site #14	
57 - 60	Remote site #15	

RQRFIX and RQRQMG

Table 2-247: RQRFIX USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01	Access to the Repair Lost Routes command	FOR VERSION L ONLY N Disabled (default). Y Allow access to the Repair Lost Routes command from the Options menu and toolbar icon. This command is useful for cases where routes become messed up. It allows you to select the route to repair.
02 - 60	Not used	Leave blank

Table 2-248: RQRQMG USERSEC parameters for the REQS module

COL	CONTROLS	DESCRIPTION
01	Reset Print Date command (P command in traditional software)	A A dialog box for PO comments displays. Comments are optional (default). B A dialog box for PO comments displays. Comments are required. C The dialog box for entering comments does not display.
02	Default choice for <i>Re-route Requisition</i> dialog box (R command in traditional software)	R Select the Routes radio button (default). Q Select the Queues radio button.
03	Forcing approval after referring a requisition (Refer command)	N Do not force approval (default). Y Force one of the following actions after purchasing has used the Refer command and filled in the <i>Refer Requisition</i> dialog box: using the Change (C) command or the Approve with Notation (B) command.
04 - 60	Not used	Leave blank

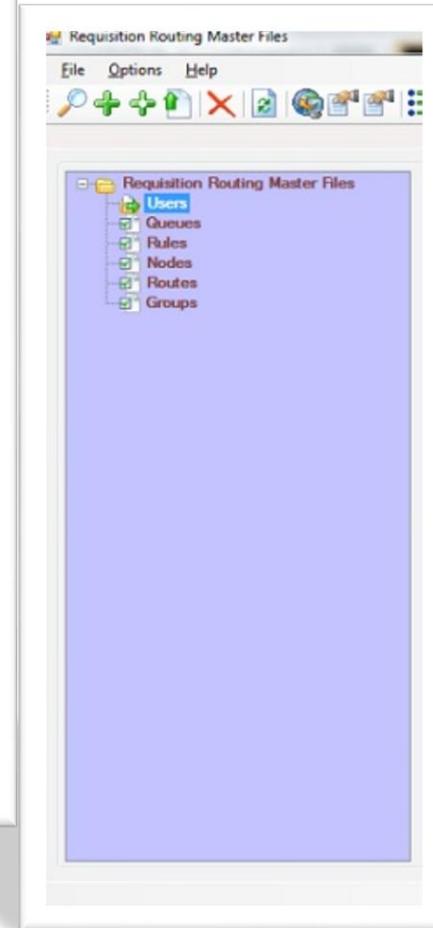
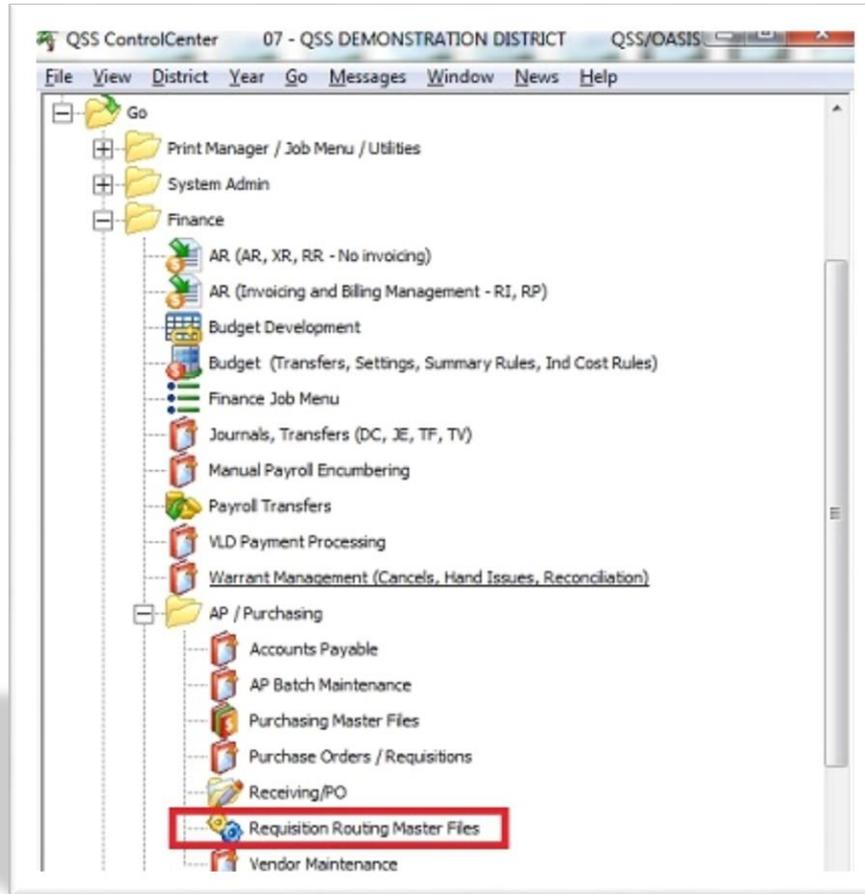
Background Jobs for Requisition Routing

- Nightly Update Job (RQR900)
 - Sites that are using Requisition Routing need to set up the RQR0900ST job to run every night. This job runs the following programs:
 - RQR910 clears the flag for requisitions for which the system has already created automatic email notifications
 - RQR920 generates email messages for notification of requests that have timed out for routing users flagged for email notification
 - RQR930 clears the absence flag for approvers who are flagged as absent in the User Maintenance master file for the *Requisition Routing Master Files* window. If you do not stream this job, the absence flag remains until someone clears it
 - RQR900ST for the HP e3000 instructions may be found in MTUS beginning on page 2-312
 - rqr900st for the Linux OS instructions may be found in MTUS beginning on page 2-313

Configuration File for Email Notification (CONFIG)

- The CONFIG file is required to use the QSMD (**QSS** Send Mail Daemon) to send out email notifications for Requisition Routing. Once you set up this file, you can create the email messages as described in “Configuration File for Text of Generated Messages (RQREMAIL)” on page 2-316.
 - The file is located in the following places:
 - For Version H – CONFIG.MAIL.QSSUSER (or a customized user logon account for your site)
 - For Version L - \$QSM_CONFIG_DIR/CONFIG.MAIL
 - Configuration File for Text of Generated Messages (RQREMAIL)
 - The RQREMAIL file allows the setup of messages the Requisition Routing sends based on actions on requisitions
 - \$INQUEUE defines the email message used when requisition arrives in someone’s queue
 - \$TIMEOUT defines the email message used when the system determines that requisitions have not been approved by their deadlines. The RQR920 program creates these notifications
 - \$CANCEL defines the email used when a requisition is cancelled with Year-End Requisition Cancellation (POX086)
 - \$CXLONL defines the email used when a requisition has been cancelled before assignment of a PO number

Clear understanding of the Master Files



User Maintenance

Requisition Routing Master Files - User Maintenance

File Navigation

Save Save and Close Close

DEA11, Don Hemwall - District 39 Change ...

Users : DEA11 - Don Hemwall

User : DEA11 Name : Don Hemwall

Notify : E - E-Mail E-Mail Address : DHemwall@hamscomputer.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 Authority	Delete Authority
▶	PS	PROFESSIONAL SERVICES	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*			<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Move Row Up Move Row Down Remove Row

Yr: 2008 Dist: 39 Site: 0 4:14:16 PM 1/11/2019

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 in Queue Management.
- Absent Notify – checking this will notify other approvers of your queue that you are absent.
- Return Date – If the absence-end-date is less than or equal to the current system date when the RQR930 job is run, it will clear the absent date.
- 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 for which ever ones you check.
- 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

PUR-ADMIN, Purchasing Administrator - District 39 Change

Queues :

Queue : Name : Abbreviation :

Advisory Queue : Auto Approval : Allow Approval Without Budget Info :

Default Notify : Default Approval :

Time-Out Days Notify Originator on Time-Out : and/or User : Buyer Code

	User ID	User Name	Queue Owner	Notification	Approval	Replace Route	Use	App Maximum
▶	<input type="text" value="DEABTEC2"/>	BUDGET TECHNICIAN #2	<input type="text" value="N"/>	<input type="text" value="@"/>	<input type="text" value="A"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	\$0.00
	<input type="text" value="DEAPADM"/>	PURCHASING ADMIN	<input type="text" value="Y"/>	<input type="text" value="D"/>	<input type="text" value="Y"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	\$0.00
	<input type="text" value="DEAPBYR1"/>	PURCHASING BUYER #1	<input type="text" value="N"/>	<input type="text" value="A"/>	<input type="text" value="A"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	\$0.00
	<input type="text" value="DEAPBYR2"/>	PURCHASING BUYER #2	<input type="text" value="N"/>	<input type="text" value="A"/>	<input type="text" value="A"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	\$0.00
	<input type="text" value="DEABTEC1"/>	BUDGET TECHNICIAN #1	<input type="text" value="N"/>	<input type="text" value="N"/>	<input type="text" value="Y"/>	<input type="text" value="N"/>	<input type="text" value="N"/>	\$0.00
*	<input type="text"/>		<input type="text"/>					

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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 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.
- Allow Approval Without Budget Info - Checking this allows the queue to be approved without account codes being present on the requisition.
- 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.

Queue Maintenance

- Time-Out Days – Number of days a requisition sits in a queue with no action taken before a time-out notification is sent.
- 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

AP-CBO, Approval by CBO - District 39 Change

Rules : AP-CBO - Approval by CBO

Rule : AP-CBO Name : Approval by CBO Abbreviation : ACBO

Eval as : T - Apply if all variables are True Eval Acct Fields : S - Separate Multiple Acct Option : A - Match all accounts

	Variable	Operator	Low Value	High Value
▶	\$AMT	IB	75000.01	150000.00
	\$BUYER	SE	Z	
*				

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.
- Eval Account Fields - Will optionally take accountclass component variables (such as Fund, Resource, etc) and treat them like individual variables for the rule evaluation rather than the default behavior of using all of the accountclass component variable results as a single “pass or fail”. The default for this field is “C”ombined. The option of “S”eparate should only be used in special circumstances when a rule is designed to test for more than one account component variable.

Rule Maintenance

- 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.
- Variable – List of fields available to be evaluated. To see a list of the variables, go to the Rule Maintenance form, select the ‘Rule Help’ choice from the ‘Options’ menu or alternately press the ‘F1’ key from the Rule Maintenance form.
- 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

APP-CBO, Approval by CBO - District 39 Change

Nodes : APP-CBO - Approval by CBO

Node : APP-CBO

Name : Approval by CBO

Abbreviation : ACBO

Approval Queue : CBO CBO Approval

Rule : AP-CBO Approval by CBO

Default Referral : O - Refer the requisition back to the Originator

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

Yr: 2008 Dist: 39 Site: 0 5:03:24 PM 1/11/2019

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

GLOB-END, Global Ending Route - District 039 Change

Routes : GLOB-END - Global Ending Route

Route : GLOB-END Name: Global Ending Route Abbreviation : GLOB-END

ONLY for Group :

	Node ID	Node Description	Referred
▶	APP-CONTRLR	Approval by Controller	
	APP-CBO	Approval by CBO	
	APP-SUPT	Approval by Superintendent	
	PUR-CLERK-AM	Purchasing Clerk A-M	
	PUR-CLERK-NZ	Purchasing Clerk N-Z	
	PUR-BUYER-NZ	Purchasing Buyer N-Z	
	PUR-BUYER-AM	Purchasing Buyer A-M	S
	PUR-ADMIN	Purchasing Administrator	S
	APP-PDIR	Approval by Purchasing Dir	
*			

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

PS, PROFESSIONAL SERVICES - District 39 Change

Groups : PS - PROFESSIONAL SERVICES

Group : PS Name : PROFESSIONAL SERVICES Abbreviation : PS

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
▶	DEA11	Don Hemwall	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	DEABTEC1	BUDGET TECHNICIAN #1	<input type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*			<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Route ID	Route Name
*		

Move Row Up Move Row Down Remove Row

Yr: 2008 Dist: 39 Site: 0 5:11:49 PM 1/11/2019

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 Users and optional 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.

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-reroute 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 GroupA

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 GroupA

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 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

Repair Lost Route

Allows recovery of requisition that has become “lost” in a route and can’t be accessed for approval in Queue Management Form.

Sets “W”aiting node at last approved node or first node of highest series (software determines action).

