ACCESS POINT REGISTRATION

Users must register with Access Point and QSS before accessing the database to input requisitions. Please note, to go-to Access Point, user must utilize Internet Explorer 5.0 or greater. Should you have any questions, call the Help Desk at 408-453-6666.

To register for Access Point, go to http://accesspoint.sccoe.org and follow the instructions to successfully register on Access Point. See sample #1 below:

QSS REGISTRATION

Before accessing QSS, the user will need to fill out a QSS Security Form and submit the completed and signed form to the Help Desk. Go to the following link to access the QSS Security Form: https://accesspoint.sccoe.org/pdfs/default.asp . See sample #2 below:

SANTA CLARA COUNTY
OFFICE OF EDUCATION

QSS Security Access Request Form

Choose One: *NEW USER:* ______ *APPEND :*______ *REPLACE SECURITY:*______

Using Adobe Acrobat Reader, fill out this form completely and then print it out. Have your manager sign and date the printed form. Fax the signed and completed form to RTC Help Desk at (408) 453-6795. Incomplete, handwritten, or printed entries will not be accepted and will be returned.

Last Name | First | MI | E-Mail Address | Phone # / Ext.

Fax Number | District | District # | Dept. | Position

Mail Code (Dist. 90 Only)____________

QSS Security by Module (Y/N)

General Ledger (JE DC CT): ☐☐☐ Inquiry; ☐☐☐ Data Entry; ☐☐☐ Approval

Budget Transfers: ☐ Inquiry; ☐ Data Entry; ☐ Approval

Budget Development: ☐ Inquiry; ☐ Data Entry; ☐ Approval

Purchasing: ☐ Inquiry; ☐ Data Entry; ☐ Approval; ☐ Hierarchy; ☐ Print PO's; ☐ Remote PO; ☐ Remote Adm; Remote Site # ☐

Accounts Payable: ☐ Inquiry; ☐ Data Entry; ☐ Release for Pay

Accounts Receivable: ☐ Invoice Entry/Print; ☐ Customer Mstr File Maint.; ☐ Other AR Mstr File Maint. (Terms, types, tax juris.); ☐ AR Receipts Entry & Deposits

___AR Invoicing: RV = by Revenue
RS = by Reserve

Stores: ☐ Inquiry; ☐ Data Entry; ☐ Fill Orders; ☐ Master Files

Fixed Asset: ☐ Inquiry; ☐ Data Entry; ☐ Approval

COMPLETE PG 2: ☐ Payroll; ☐ Personnel; ☐ Absence Trkg

COMPLETE PG 3: ☐ DBAS

Comments: ____

Printer IP Addr (Req'd): __________ Updates Vendor File? (Y/N): ____ Maintains Chart of Accts? (Y/N): ____

AUTHORIZED SIGNATURE

Date: | Manager Name (Typed): | Mgr. E-Mail Address (Typed) | Manager Signature

FOR RTC USE ONLY

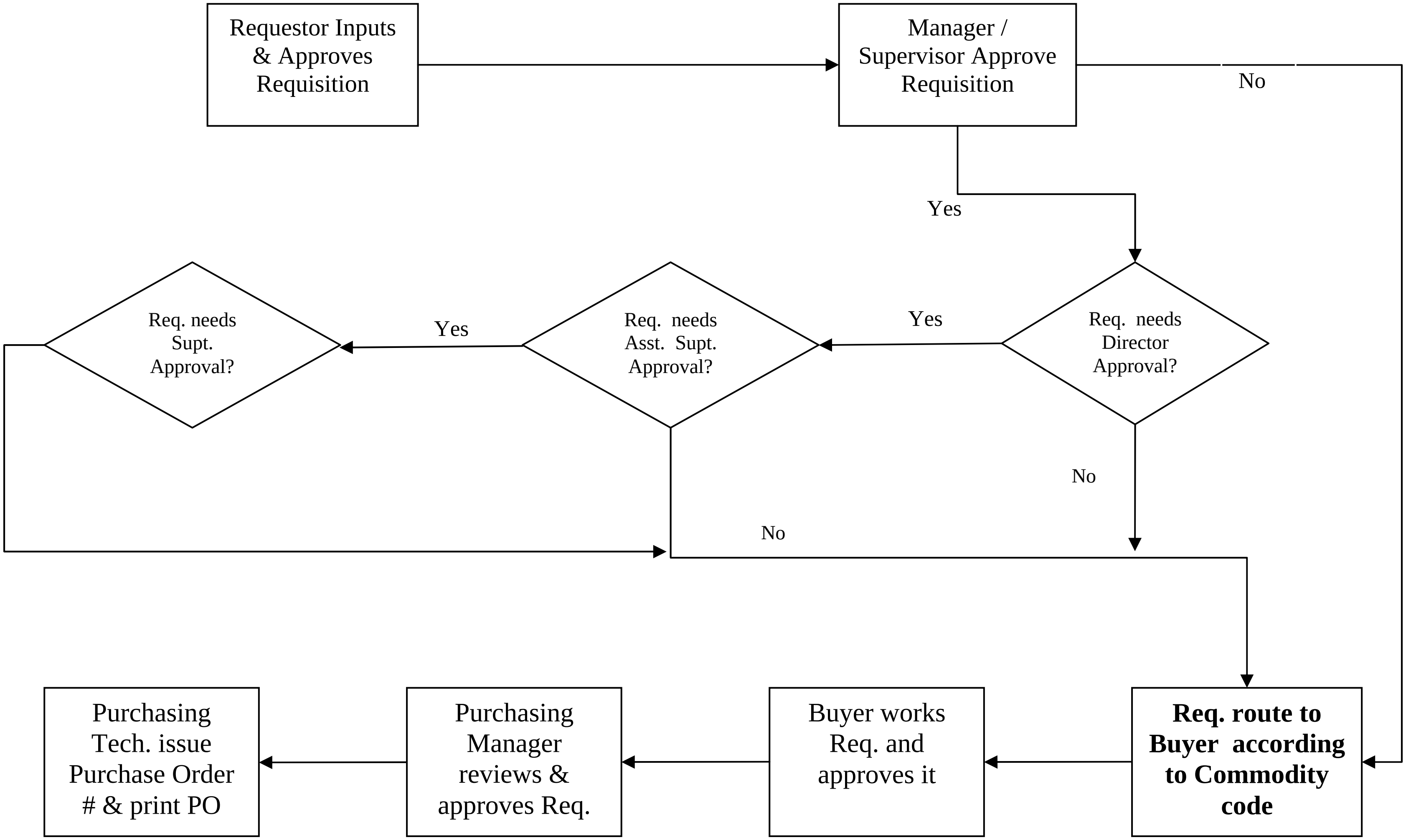
Dist 90 Finance Apprvl:____________ Dist 90 Payroll Apprvl: ____________

Security Request #: ____________ MPE/IX ID: ____________

Main QSS Menu:____________ MPE/IX Password: ____________

RTC Initial/Date:____________ Initial/Date: ____________

PAGE 1: SECURITY FORM (V1.9a, 12/27/02, ks)


Requestor Inputs & Approves Requisition
Manager / Supervisor Approve Requisition
No
Yes
Req. needs Supt. Approval?
Yes
Req. needs Asst. Supt. Approval?
Yes
Req. needs Director Approval?
No
No
Purchasing Tech. issue Purchase Order # & print PO
Purchasing Manager reviews & approves Req.
Buyer works Req. and approves it
Req. route to Buyer according to Commodity code

QSS HIERACHY / ROUTING

Once the user receives his / her login and password from RTC, the user needs to advise Purchasing so that the hierarchy can be build specific to the user's requirement. The following information is needed for the correct hierarchy routing to be build:

1) Complete Name
2) Email address
3) Department Name
4) Supervisor / Manager Name

To get access to the QSS Purchasing menu, user must first log into:

1) Access Point (See Figure #1)
2) Click "Go To QSS" (See Figure #2)
3) To login into to QSS, the "Login ID" can not be more than eight (8) characters long.
4) The user has up to seven (7) digits on your last name and the first letter of the user's first name.
    A. Ie. Last Name: Smith
    B. First Name: John
    C. Login Id: SMITHJ
5) To login, the user should type **HELLO** then your **login id, dot (.)SCCOE**2

Ie: **HELLO SMITHJ.SCCOE2**

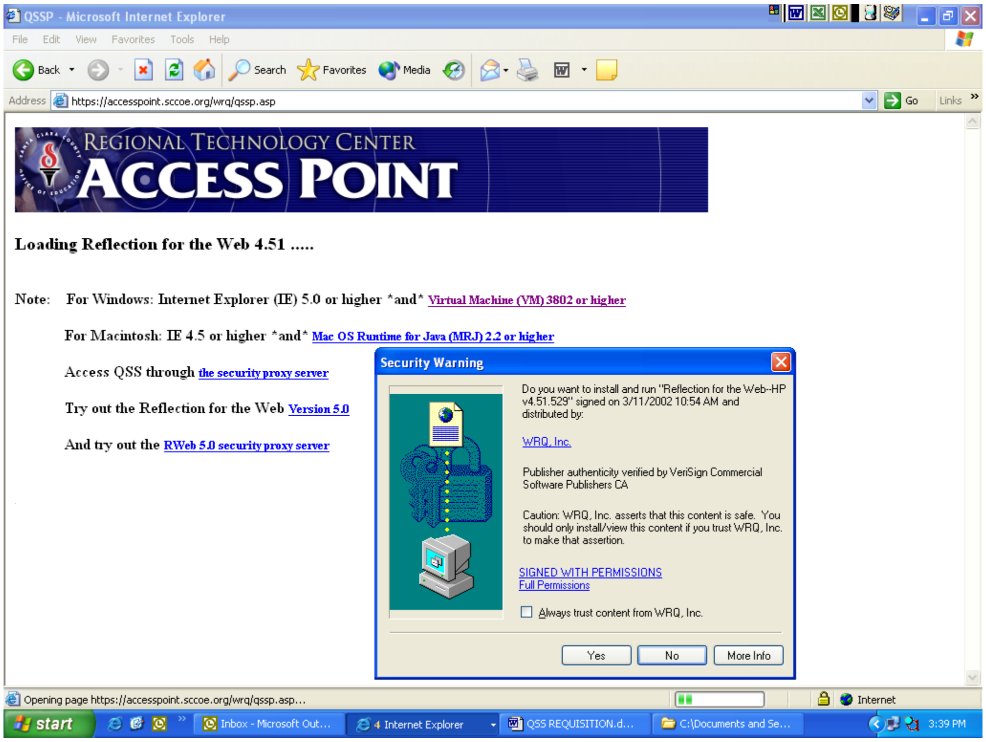
After the login id, QSS should prompt the user for the password (see Figure #3);

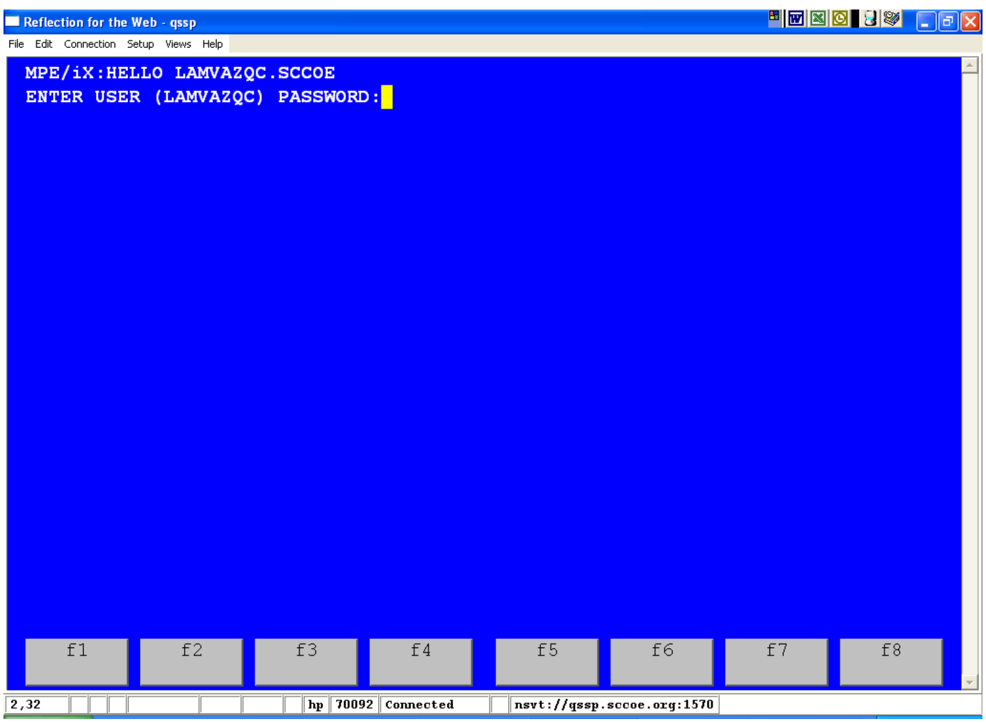
Put in your password and hit <Enter>

Figure #1

Figure #2

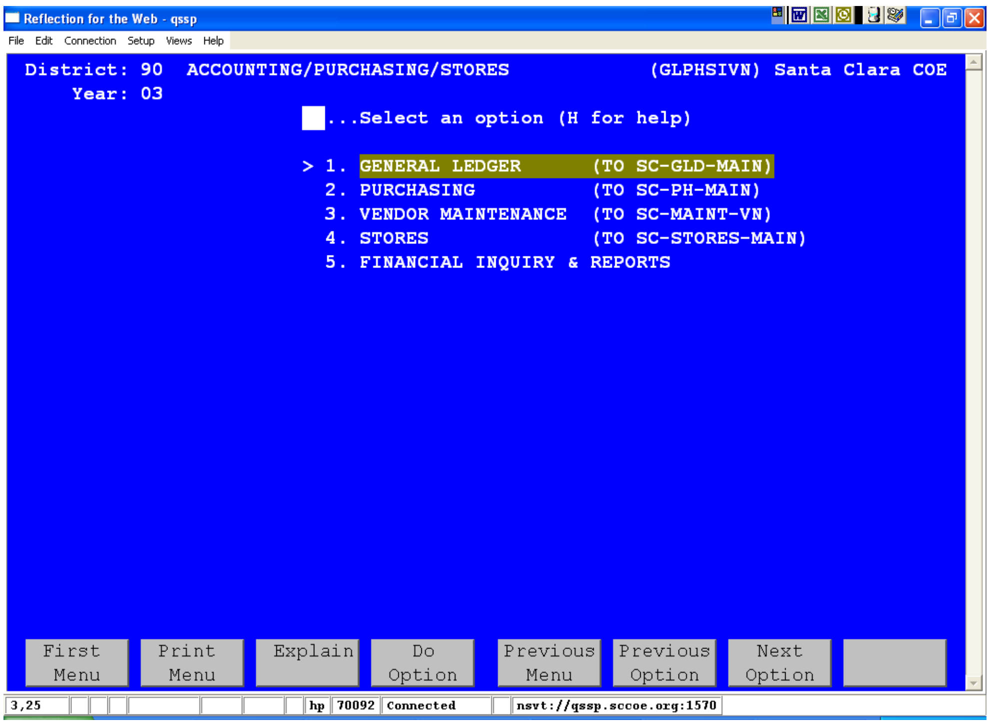
Once this screen come on, click "Yes" for Access Point to install "Reflection"





ACCESS PURCHASING MENU

Once the user logs into QSS, the option menu will appear (not everyone will have the same menu).



From this initial option menu, select the "PURCHASING" option by entering the line number associated with the purchasing module and hit <ENTER> to complete your entry.

1) A second menu will appear (refer to Figure #4).
2) From that menu, select "P.O. REQUISITIONS" then hit <ENTER> to complete your entry.
3) "REQUISITION ENTRY FOR P.O.'s" screen will appear, enter "H" to view the full menu of options (see Figure #5).

Figure #4

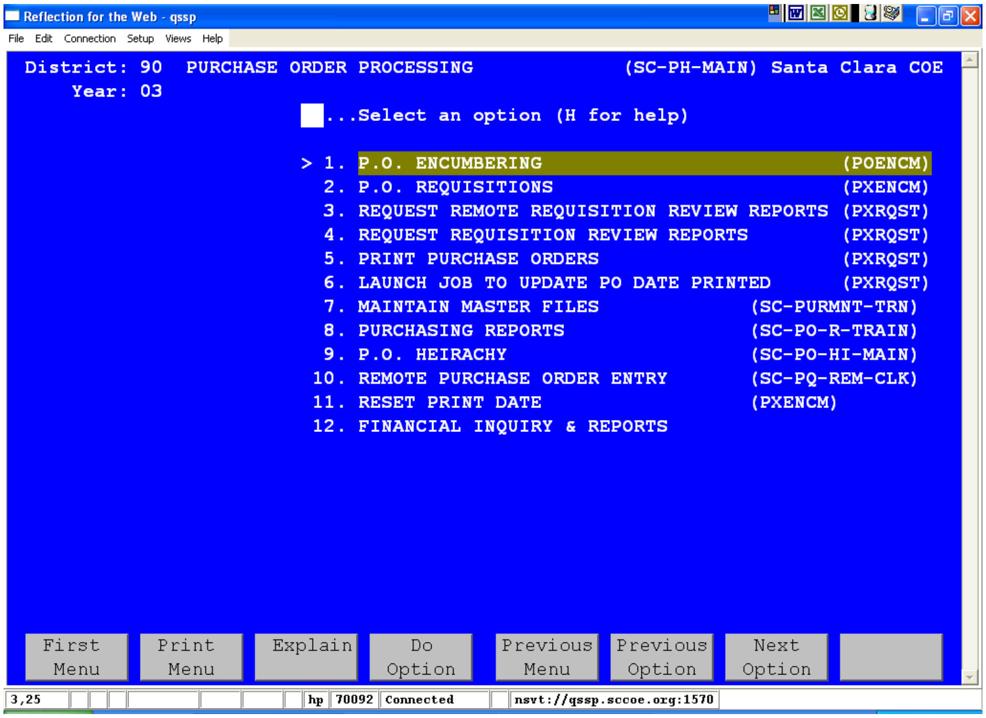
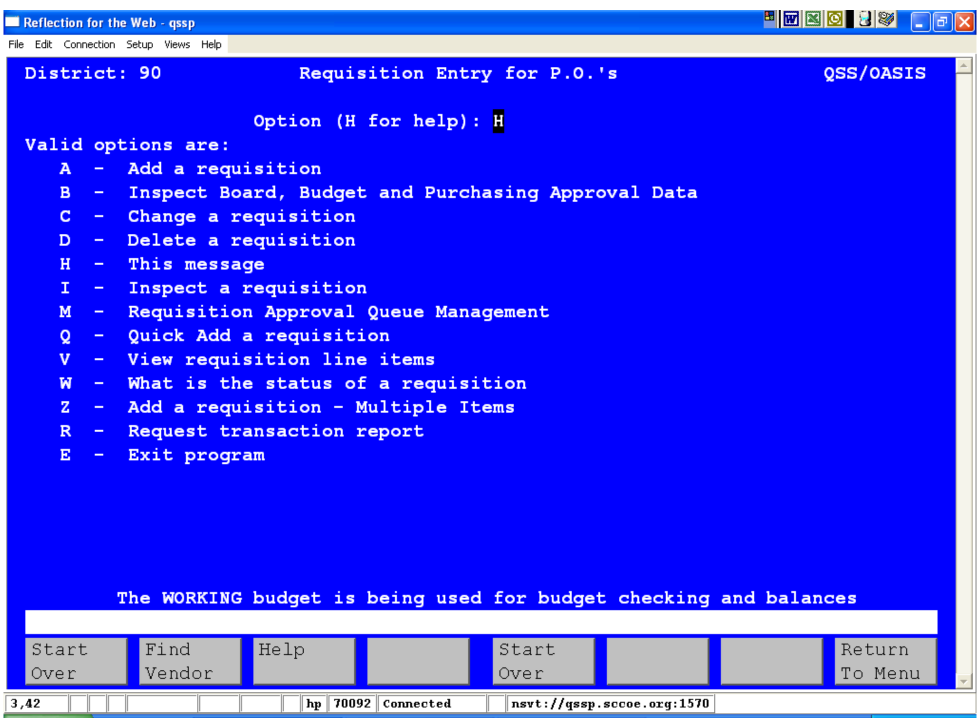


Figure #5

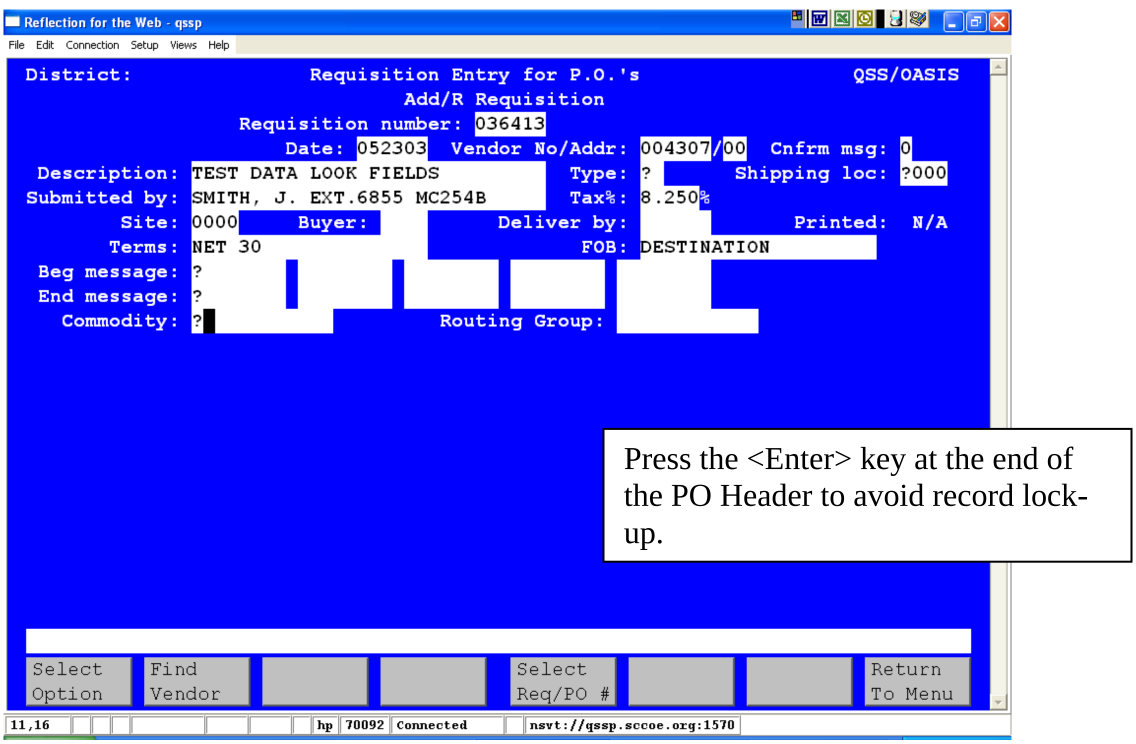


INFORMATION LOOK UP

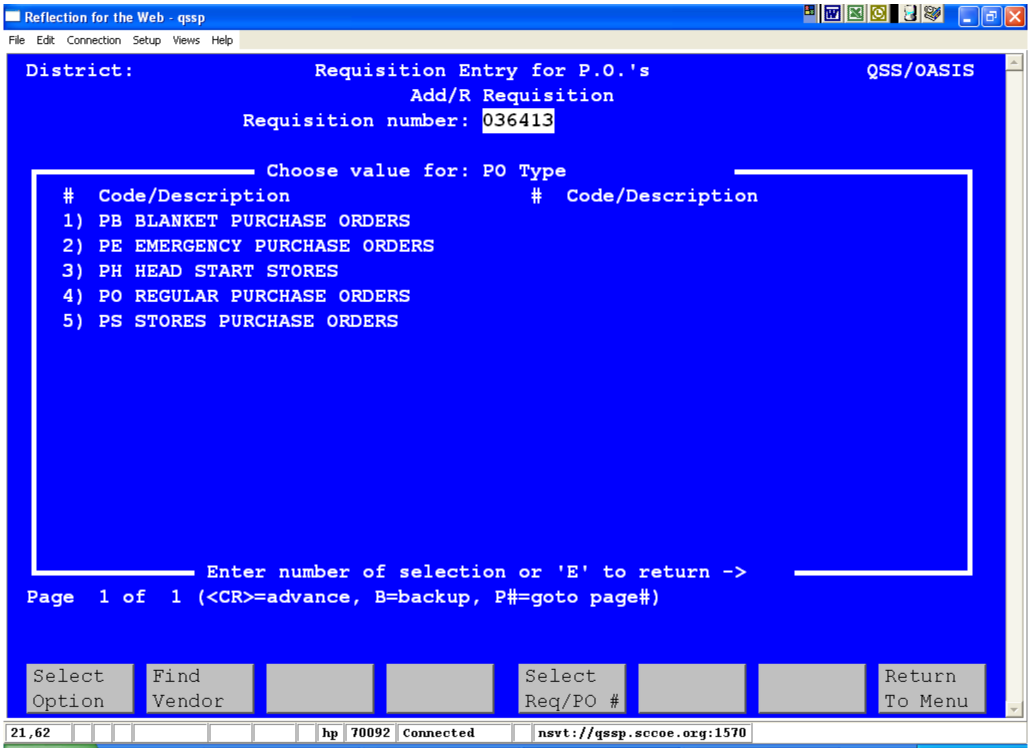
There are certain fields in the Purchase Order Header screen users are able to look up information. To do this:

1) Put a question mark (?) in the field(s) in question
2) Tab to the next required field to complete the entry
3) Press <ENTER> at the end of the header

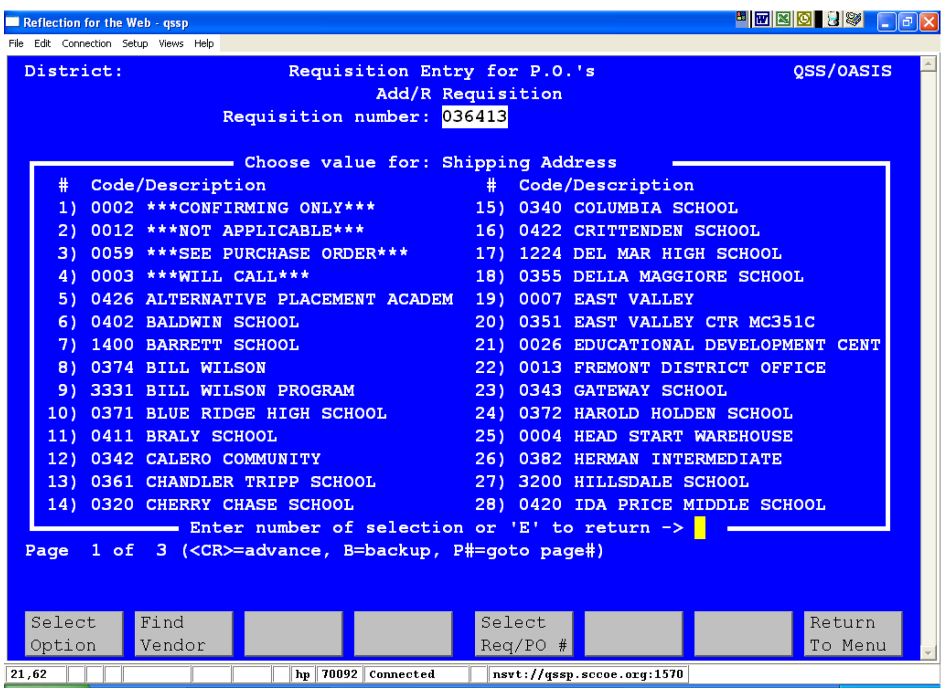
Note: User should not press the <ENTER> until all required information has been input including the question mark (?). If this is done, QSS will lock the record and further data input will not be possible.
See sample below:



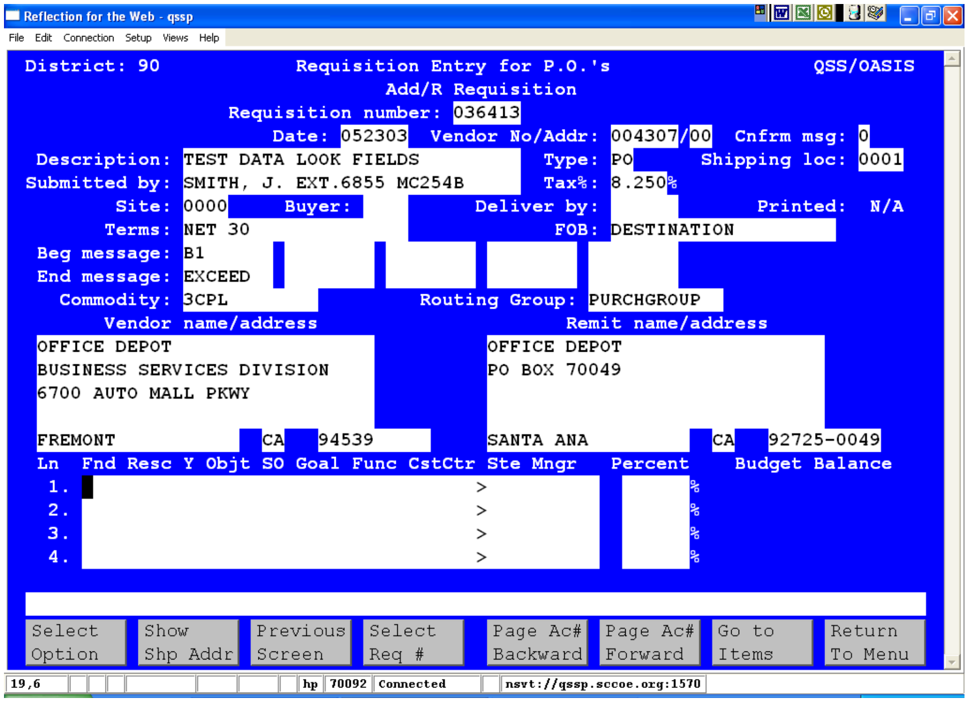
Once the user presses the <ENTER> key, the options available for the field in question will come up. To make your selection, input the respective number located on the left hand side then press the <ENTER> to complete your entry before going on to the next field.



NOTE: Since the PO Type is the first question mark (?) QSS sees, it is the first screen it will come up.



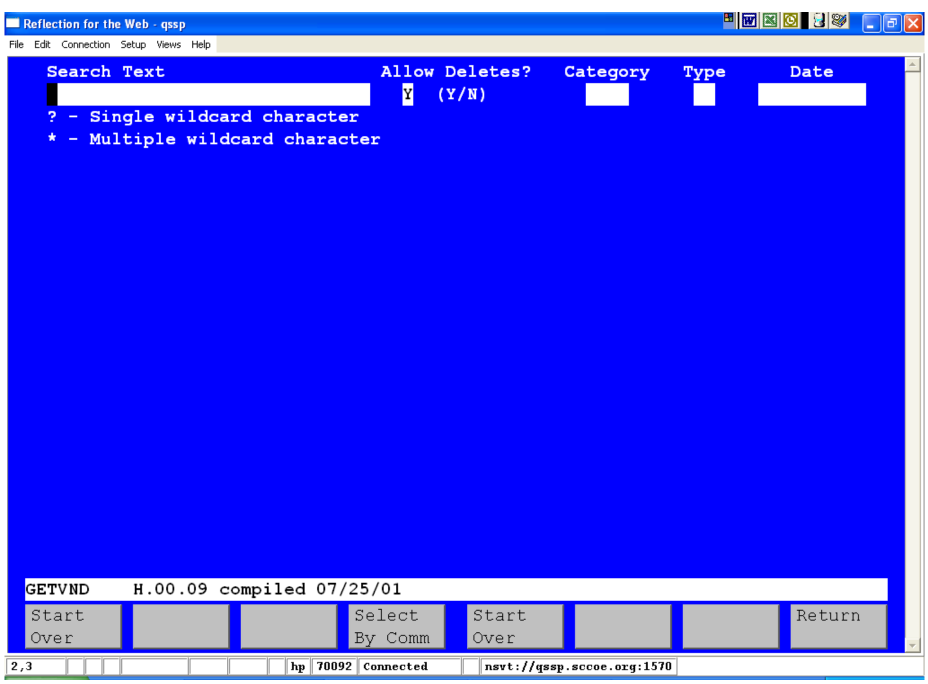
NOTE: Shipping location option. Make your choice by choosing the respective number.



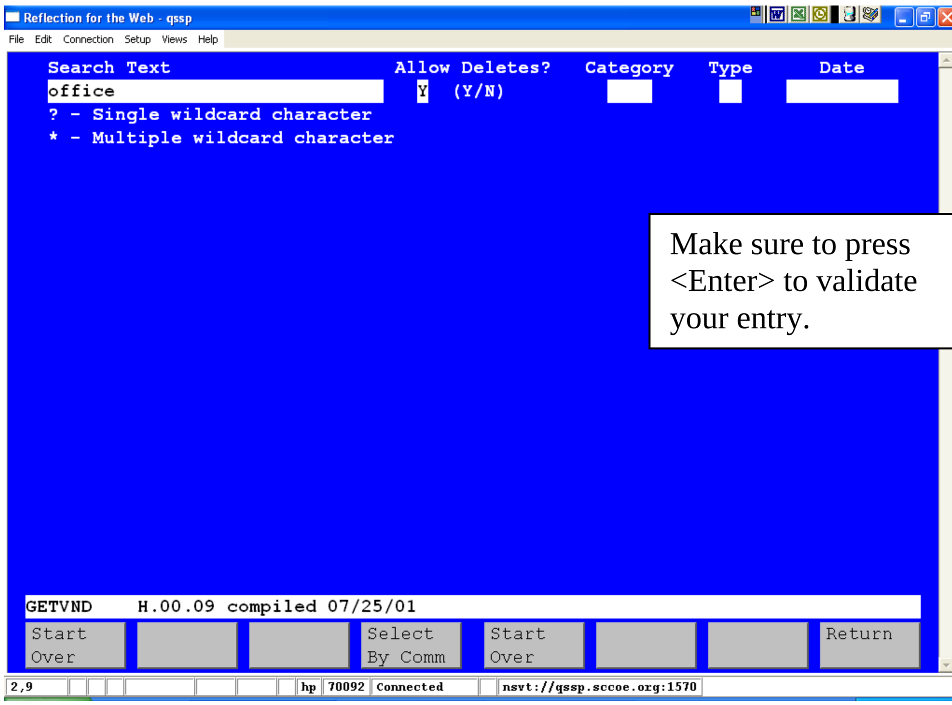
Note: Completed requisition header.

VENDOR LOOKUP:

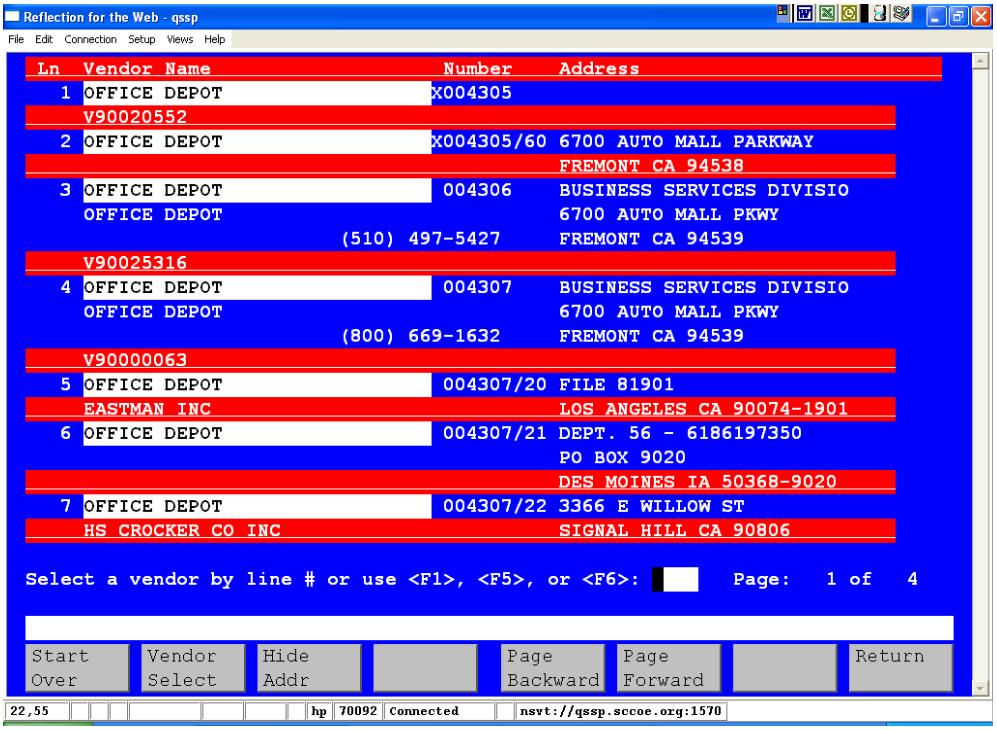
When you press the <F2> function key to access the Vendor Lookup function, the following screen appears



The vendor lookup function allows you to quickly find vendor numbers by vendor name. User can type up to 8 characters of the first part of the name. The program will return a list of vendor names that match your entry or will display the message, “No matching records found” if there are none that match your entry.



Make sure to press <Enter> to validate your entry.



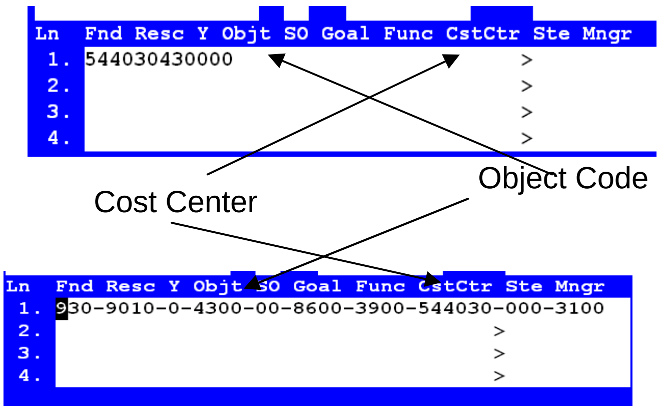
Note: On the right hand side, QSS identify the number of page under the “Office.” To access the next page, press F6.

You can navigate through the list until you find the vendor you need, then select that vendor by line number. If you do not see the vendor you need, you can modify the search to bring up another list of vendor based on the new criteria.

Should you have a new supplier, contact COE Purchasing Services to have it added.

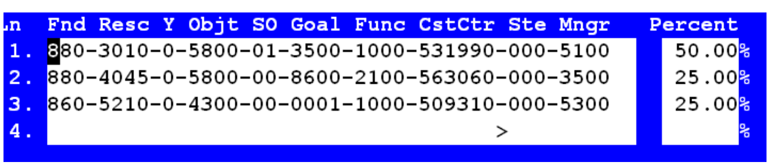
PSUEDO-CODES

A pseudo-code is the 12 digit number the user enters to tell the system what account structure will be used. The first six digits are actually the cost center codes and the second six digits are the object codes.

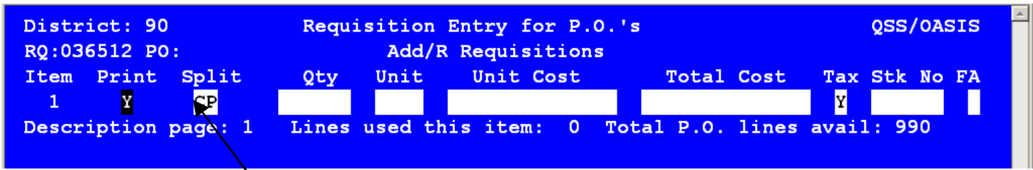


ACCOUNT DISTRIBUTION

If the user would like to use multiple accounts for a purchase order, there are three ways to split up the accounts used. QSS automatically splits the accounts used evenly by percentage, unless the user specifies a percentage to use for each account.

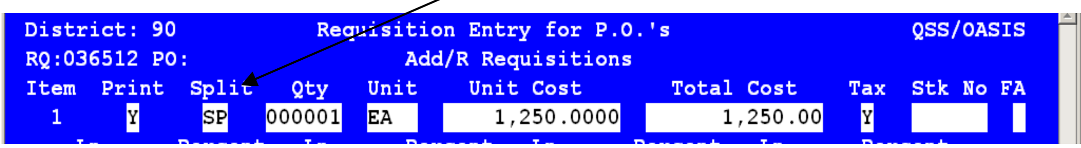


For example, if user is using three accounts, QSS will split them up evenly at 33.3% unless user specifies a different percentage

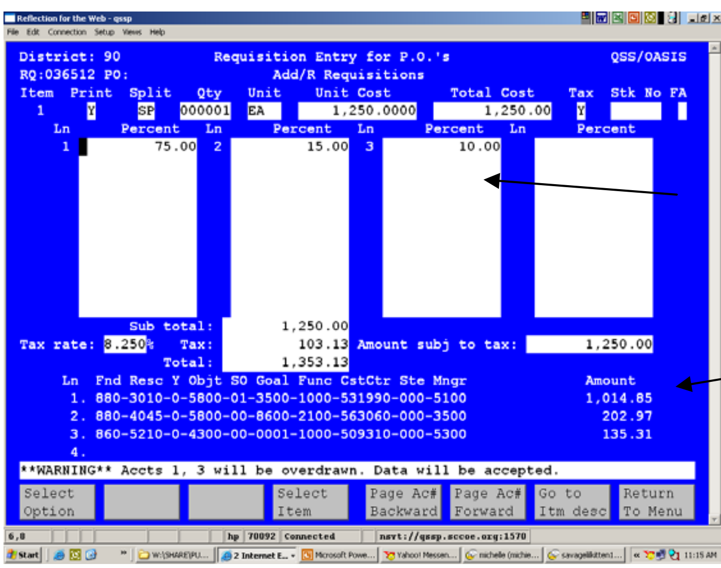


When user moves to the Item entry screen, QSS uses the "Calculated Percentage" (CP) that was used on first requisition entry screen. QSS will default to "CP" split on every item unless user specifies a different split.

The user may split the accounts two different ways. By dollar or by percentage. To split accounts by percentage, user must enter "SP" in the "Split" section of the requisition screen.

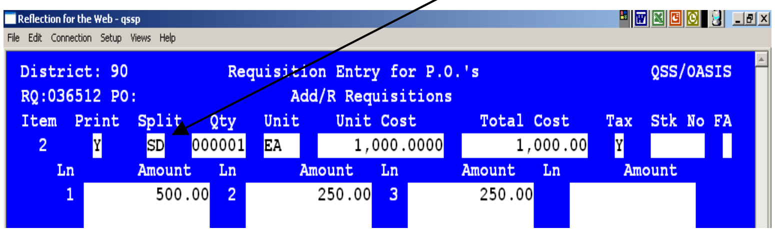


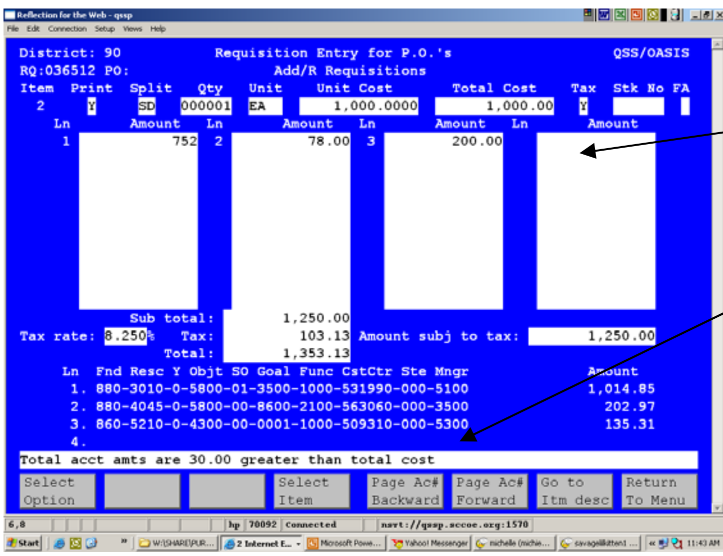
After entering all required information and hitting enter, the account distribution screen will come up.



User may split accounts any way they would like, as long as the total percentage equals 100%. If total does not equal 100%, user will not be able to continue. QSS will also show a total by account on bottom of screen.

User may also split accounts by dollar amount. To split accounts by dollar, user must enter “SD” in the “Split” section of the requisition screen.





QSS will automatically split accounts by “CP” split. User may then enter preferred split and hit enter. The total dollar amount must equal total of item, or user will not be able to continue. QSS will inform user of the amount that the split is incorrect by. The new totals by account are for running total of purchase order, not by item. Once user is finished with account distribution screen, user hits enter and then “F7” to continue to item description screen. User then will complete purchase requisition in the usual manner.

ADD A REQUISITION

There are there different methods for entering requisition: options **Q, Z** and **A**. The maximum number of accounts is 40 for all of these options. The maximum number of lines items is 99 for option Q and A, and 95 for option Z.

Option Q: Quick Add

Use this option if you are entering only one account. This is the quickest way to add a requisition. You can enter up to 99 line items as long as they are all charged to the same account.

Option Z: Add Requisitions-Five Line Items per Screen

If you are entering multiple accounts, but will split all line items costs among accounts in the same manner, you can us option Z. This option allows you to enter up to 5 lines items on one screen.

Option A: Add Requisition – One Line Item per Screen

This option allows you to enter only one line item on a screen, but you can split the costs fro each line differently. You can enter up to 99 line items with a total of 990 lines of descriptive text per Requisition. This increased flexibility requires the use of additional screens.

NOTE: We recommend you use option "A" for all requisition entries. Option A is the most flexible option out of the three choices. We will only focus option A, should you have questions on the other two options, please contact Purchasing Services.

ADD A REQUSITION USING OPTION "A"

As previously discussed, option A allows users to enter multiple line items and multiple accounts therefore making the most flexible option. You can enter up to 99 line items and 40 accounts. The line item description can total up to 990 lines for the entire requisition. Because option A is the most flexible of the ADD options, it requires several screens:

Header Screen

This screen records general information about the purchase, such as requisition and PO numbers, order date, vendor, requestor, tax rate, beginning and ending message, and delivery date just to name a few.

Account Screen

This screen displays the vendor name and address, contain the accounts to be charged and the default percentage splits for the line items.

Item Information and Description Screen

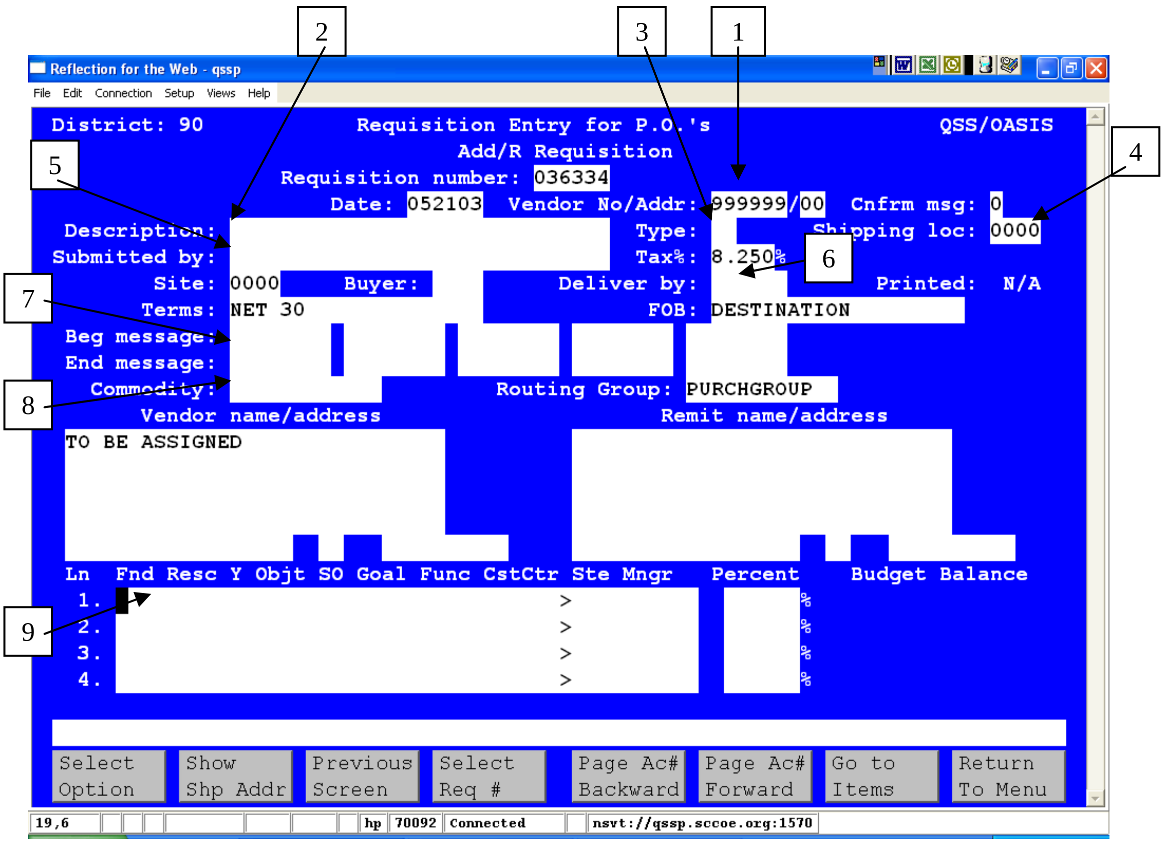
This screen records the line item costs, description, and must be completed for each line item.

Split Screen

This screen is only used if you do not want to use the default percentage splits specified on the Account Screen. It allows you to distribute items costs differently for each line item.

Header & Account Screen

To add a requisition, the user needs to be on the following screen. Review the navigation tips below before attempting to input a requisition.



Default Fields---System generated

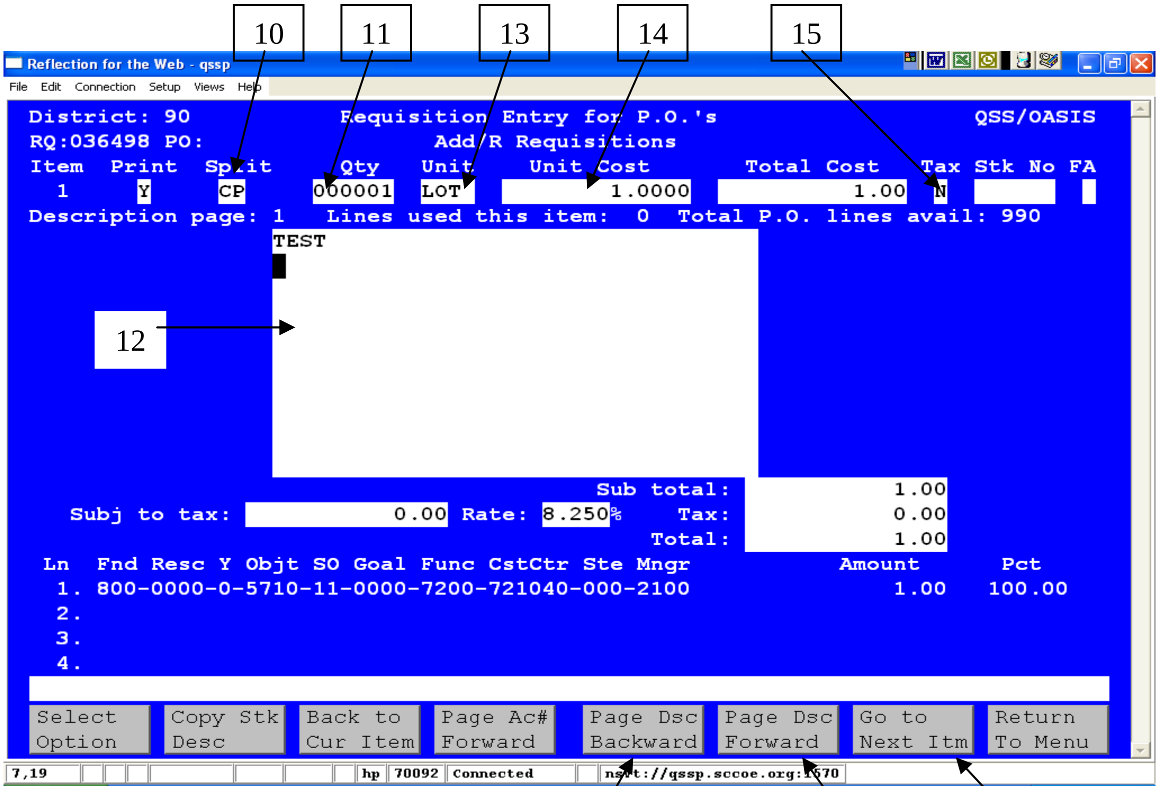
Requisition Number
Date
Tax

Required Fields---user need to provide information

#1 Vendor Number—look under "Vendor Look UP" for detail.
#2 Description of the requested item(s).
#3 Choose among the following options:
PO-Regular purchase Order
BP-Blanket PO
PE-Emergency PO
#4 Identify where item purchase should be delivered.
#5 Include the user last name, initial of first name, phone and mail code.
#6 Specify when product is required at the requestor's location.
#7 All blanket PO should have a beginning and ending message (B1 for beginning and Exceed for ending on all Blanket PO).
#8 Identify what commodity code the product is—it is very important that requisition have commodity code for timely process.
#9 Input the twelve (12) digits pseudo code (refer to Pseudo Code section for detail) from where expense will be withdrawn. Should you have multiple accounts, refer to "Account Distribution" heading for more information.

Note: We have just finished inputting the header screen for the requisition. To proceed, press <ENTER> and F7 (GOTO TO ITEM). This will bring up the Item Information Screen (page 15) where the users provide information such as Quantity, Unit of Measurement, Cost, Tax, and Description of the product being requested.

Note: Item Information Screen



Note: Should the user require more room for description, press **F6**. To go back to previous description screen, press **F5**.

F7

#10 With option **A**, the percentage is merely default splits that can be applied to the line items. However, you can disregard these splits and change them for any line item under option **A Split Screen**.

#11 Enter the quantity of the item.

#12 Enter the description for the product being requested (color, part number, etc.…)

#13 Enter up to four characters to specify the unit of issue for the vendor. For example: each, lot, box, case, etc……

#14 Enter the cost of each unit. Up to four decimal places are provided for fractional cents, if necessary.

#15 Enter Y to have the program calculate tax on the item; enter N to keep the program from calculating tax.

Once the entry is complete, press **Go to Next Item (F7).** At this point the user can add another item or save the requisition.***Write down the number for the requisition for your reference. Press **Update Request (F4)** to save the requisition.

CHANGE A REQUISITION

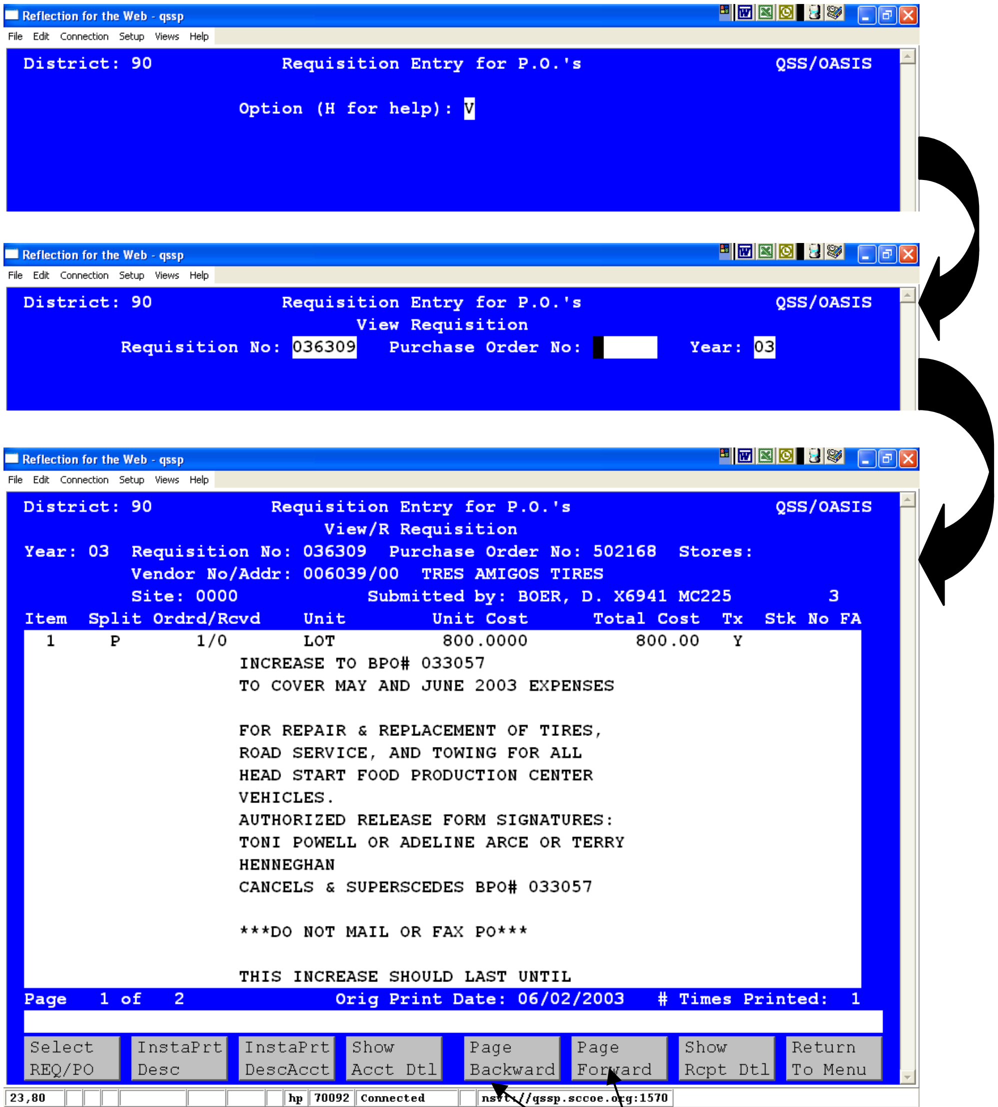
1. Change can only be made by the user when the requisition has not been approved by the user. To make a change:
2. Type **C** in the Option field on the Requisition Entry for P.O. screen and press <Enter>.
3. The **Requisition number** is displayed. Type the number of the requisition the user entered and press <Enter>.
4. Use **Tab** to move the cursor to the where the change needs to be made, make the change(s) and press <Enter>.
5. Once the change(s) have been made, press **Go To Item (F7)** to display the next screen.
6. Press **Update Request (F4)**. The screen prompts: "Really update this requisition?"
7. Type **Y** and press <Enter> to save your changes.

VIEW REQUISITION LINE ITEMS

Use option **V** to quickly view a Purchase Order / Requisition.
Type V in the Option field, on the PO Requisition – Option Screen.

1. Then press <Enter>.
2. The Requisition Entry for P.O screen will come up. Input either the requisition number or the purchase order and press <Enter>.

Note: See example on the next page:



Use F5 & F6 to toggle between multiple pages.

INSPECT A REQUISITION

This option allows you to display both requisition and purchase order. Most fields are the same as the ADD option, except that they are **read-only**. To inspect a requisition or purchase order:

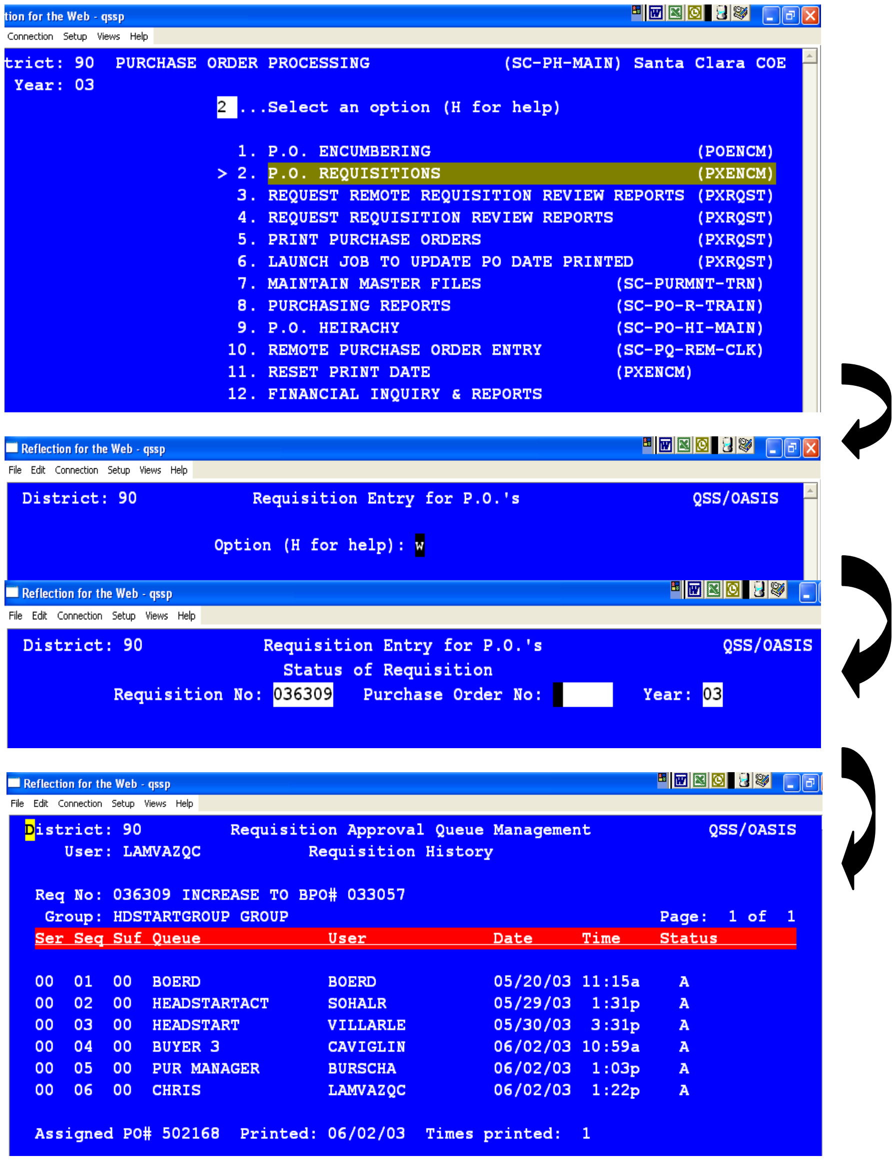
1. Use option **I** to quickly inspect a Purchase Order / Requisition.
2. Type I in the Option field, on the Requisition Entry for P.O. Option Screen.
3. Then press <Enter>.

4. The Requisition Entry for P.O screen will come up.
5. Input either the requisition number or the purchase order and press <Enter>.

VIEW STATUS OF REQUISITION / PURCHASE ORDER

Users can view the status of their requisition.

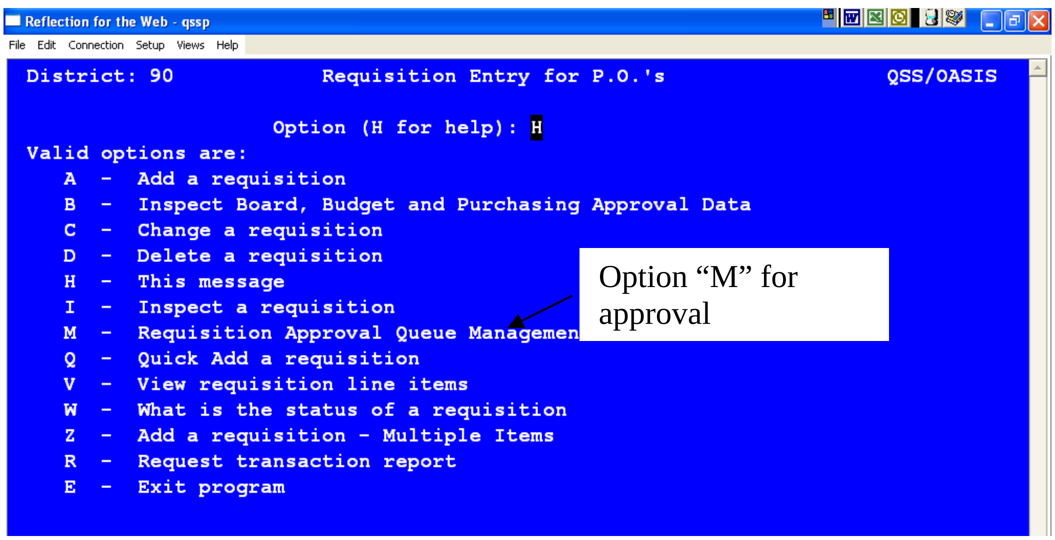
1. Type **W** in the Option field on the Requisition Entry for P.O. screen and press <Enter>.
2. The Requisition number and Purchase Order are displayed. The user only needs to input one of the two fields to access the status. Input either the requisition number or the purchase order number the press <Enter>.
3. The status of the requisition / purchase order will appear. See below for sample:


tion for the Web - qssp
Connection Setup Views Help
trict: 90 PURCHASE ORDER PROCESSING (SC-PH-MAIN) Santa Clara COE
Year: 03
2 ...Select an option (H for help)
1. P.O. ENCUMBERING (POENCM)
> 2. P.O. REQUISITIONS (PXENCM)
3. REQUEST REMOTE REQUISITION REVIEW REPORTS (PXRQST)
4. REQUEST REQUISITION REVIEW REPORTS (PXRQST)
5. PRINT PURCHASE ORDERS (PXRQST)
6. LAUNCH JOB TO UPDATE PO DATE PRINTED (PXRQST)
7. MAINTAIN MASTER FILES (SC-PURMNT-TRN)
8. PURCHASING REPORTS (SC-PO-R-TRAIN)
9. P.O. HEIRACHY (SC-PO-HI-MAIN)
10. REMOTE PURCHASE ORDER ENTRY (SC-PQ-REM-CLK)
11. RESET PRINT DATE (PXENCM)
12. FINANCIAL INQUIRY & REPORTS
Reflection for the Web - qssp
File Edit Connection Setup Views Help
District: 90 Requisition Entry for P.O.'s QSS/OASIS
Option (H for help): w
Reflection for the Web - qssp
File Edit Connection Setup Views Help
District: 90 Requisition Entry for P.O.'s QSS/OASIS
Status of Requisition
Requisition No: 036309 Purchase Order No: Year: 03
Reflection for the Web - qssp
File Edit Connection Setup Views Help
District: 90 Requisition Approval Queue Management QSS/OASIS
User: LAMVAZQC Requisition History
Req No: 036309 INCREASE TO BPO# 033057
Group: HDSTARTGROUP GROUP Page: 1 of 1
Ser Seq Suf Queue User Date Time Status
00 01 00 BOERD BOERD 05/20/03 11:15a A
00 02 00 HEADSTARTACT SOHALR 05/29/03 1:31p A
00 03 00 HEADSTART VILLARLE 05/30/03 3:31p A
00 04 00 BUYER 3 CAVIGLIN 06/02/03 10:59a A
00 05 00 PUR MANAGER BURSCHA 06/02/03 1:03p A
00 06 00 CHRIS LAMVAZQC 06/02/03 1:22p A
Assigned PO# 502168 Printed: 06/02/03 Times printed: 1

REQUISITION APPROVAL

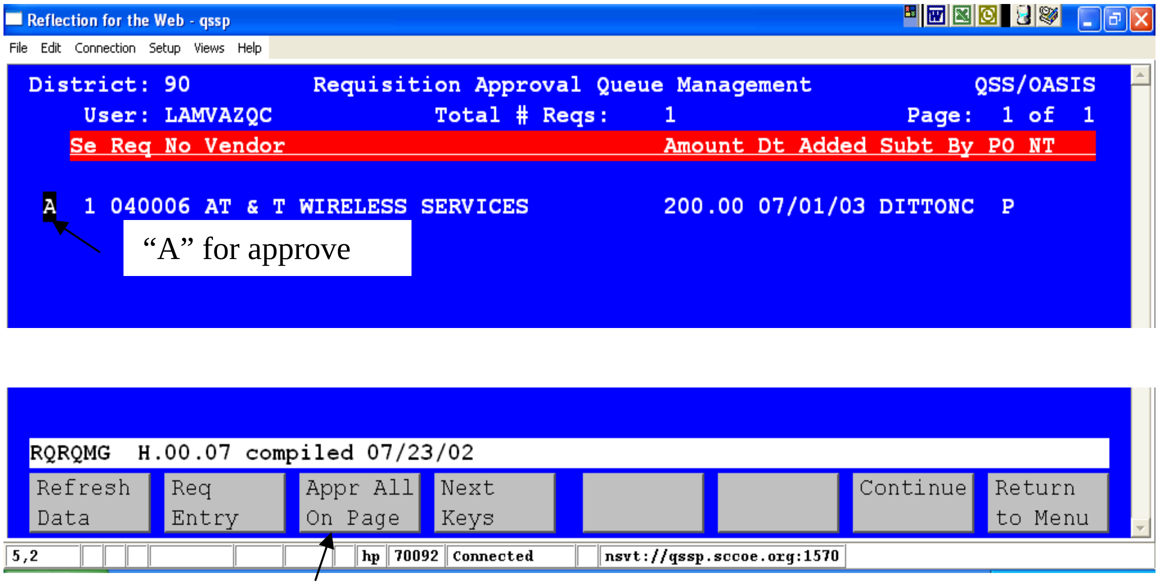
Once a requisition has been entered and saved, the **user will need to approve the requisition from the user's "Requisition Approval Que Management" or the requisition will not proceed to the next stage of the routing process.**

There are several ways to get access to the approval que. One way is by going to: Purchasing-P.O. Requisition-Option "M."



After press option "M" the approval que will appear and all requisition listed in this que will need the user's approval to proceed to the next stage in the hierarchy process. To approval, press the letter "A" on the appropriate cell then press <Enter> then F7 to complete the approval process.

The user can also press F3 to approve all the requisitions in the que. However, we do not recommend this action without first reviewing all requisitions in question.



F3 will approve all requisitions in the que.