2015

User Guide

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Overview

RAM (Requisition Approval Manager) is a workflow system for approving requisitions. The basis of RAM was originally developed by C-TEC, the vocational school for Licking County in Newark, Ohio. LACA took over development of the program in 2011, renaming it RAM and adding many modifications to allow districts across the state of Ohio to use RAM. The 2015 version of RAM adds some new features as well as correcting bugs within the program.

Requisitions from USAS are loaded into RAM on an hourly basis. A workflow of approvals can then be applied to the requisitions. Once a requisition is approved by the final approver, the accounts payable clerk is notified via email so the requisition can move forward and be converted into a purchase order.

The original requestor is notified via email when a requisition is approved, denied, or commented upon.

No data is sent back to USAS by RAM. The flow of data is one-way only.

This user guide will first cover the **Requisition Approval** portion of RAM, and then will cover the **Document Approval** portion separately.

Ram Website

Information about RAM can be found at https://www.laca.org/ram.aspx

This includes links to login pages for all ITCs and districts using RAM, as well as copies of this document and other RAM related documents.

Roles in RAM

There are multiple user roles within RAM. The main menu items you see in RAM will change, depending upon your role and your level of access. Users can belong to multiple roles at once.

District Administrator

The District Administrator is usually the Treasurer of the district. This person can change configurations for their district in RAM (workflows, employees, auditors, accounts payable clerks). They can also view all requisitions in the system.

Approver

Approvers are anyone defined as an approver in a workflow. Approvers have the ability to view and approve only the requisitions in the workflow(s) they belong to. They cannot see requisitions from other areas that they have no authority to approve.

Submitter

Submitters are anyone who submits requisitions, either through USAS or USASWeb. Submitters can log into RAM and check the status of their own requisitions, but cannot see any others.

Auditor

Auditor is a view-only access that can be given to auditors. Auditors can view all requisitions in the system, and see the full history of who approved a requisition and when.

Accounts Payable Clerk

Accounts Payable Clerks can view all requisitions in the system, including the full history of who approved them. Accounts Payable Clerks are also notified via email whenever requisitions are approved, so they can convert them to purchase orders.

Getting Started

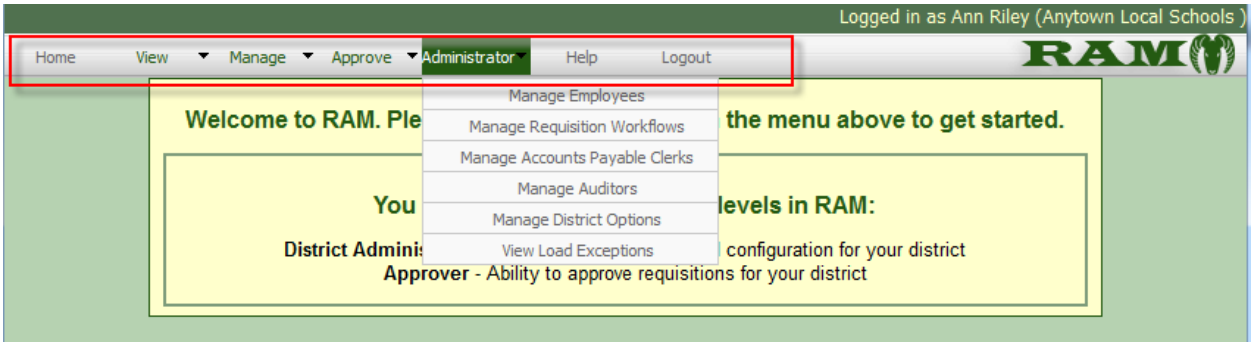
There are a few basic steps that must be completed before you can start using RAM. First, your ITC must set up an export of new requisitions into RAM, and designate an individual from your district to be the RAM administrator (usually the Treasurer and/or Assistant Treasurer).

Once this is complete, the RAM administrator logs in and completes the following tasks:

1. Add employees under **Administrator….Manage Employees**. Add anyone that will either create requisitions, approve requisitions, submit documents, or approve documents.
2. Add workflows under **Administrator…..Manage Requisition Workflows**. This is where you create the individual workflows for each business area of your school district.
3. Add an Accounts Payable Clerk under **Administrator…Manage Accounts Payable Clerks**. This will be the person who receives notice that a requisition has been approved by the final approver, and it is ready to convert into a PO.

Navigating in RAM

The menu bar is always available while you are logged into RAM. Depending on your level of access, you will have different items in this menu bar. Hover over an item with a down arrow to see more choices under that heading. Otherwise, just click the heading to select it.



Section One

Requisition Submitters

This section of the manual covers items that requisition submitters will need to know when using RAM.

Submitters

Entering Requisitions into RAM

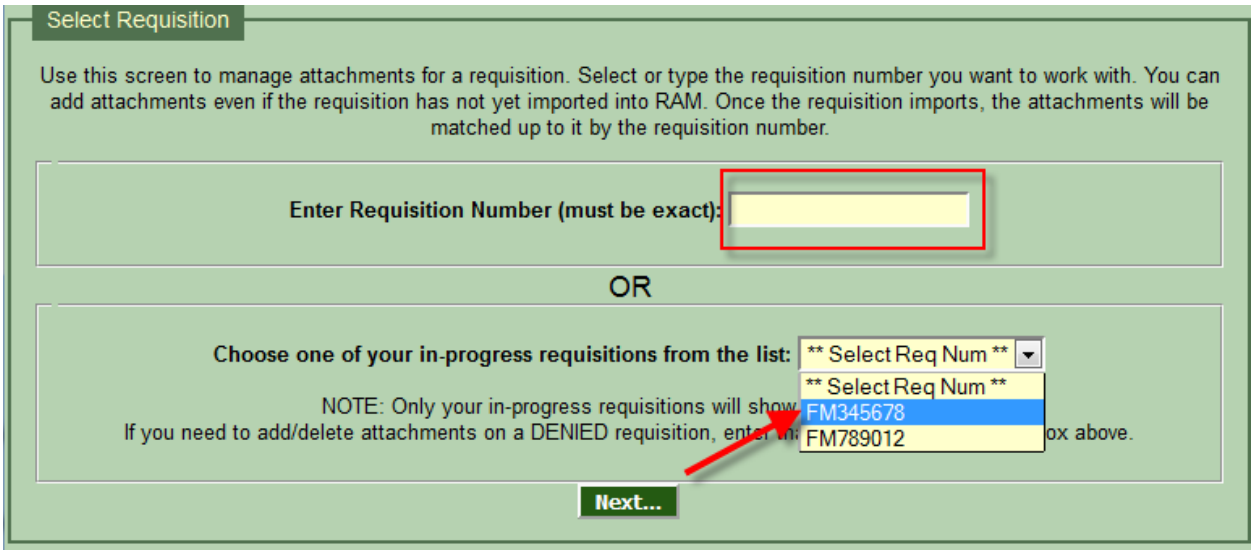
Requisitions are imported into RAM from USAS, not entered into RAM directly. You will continue to enter requisitions through USAS or USASWeb as you have done in the past. Every hour, a job runs at your ITC that exports new requisitions out of USAS and imports them into RAM.

The longest delay between adding a requisition in USAS and seeing it in RAM will be just over an hour. The export jobs usually run on-the-hour every hour, and the import jobs run at 10 past the hour. If a requisition is entered in USAS at 9:10am, it would show up in RAM around 10:10am. If a requisition is entered into USAS at 9:59, it would also show up around 10:10am. If a new requisition is entered in USAS at 10:03am, it would have just missed the 10:00am export, and would export at 11:00am and be loaded into RAM at 11:10am.

Adding Attachments

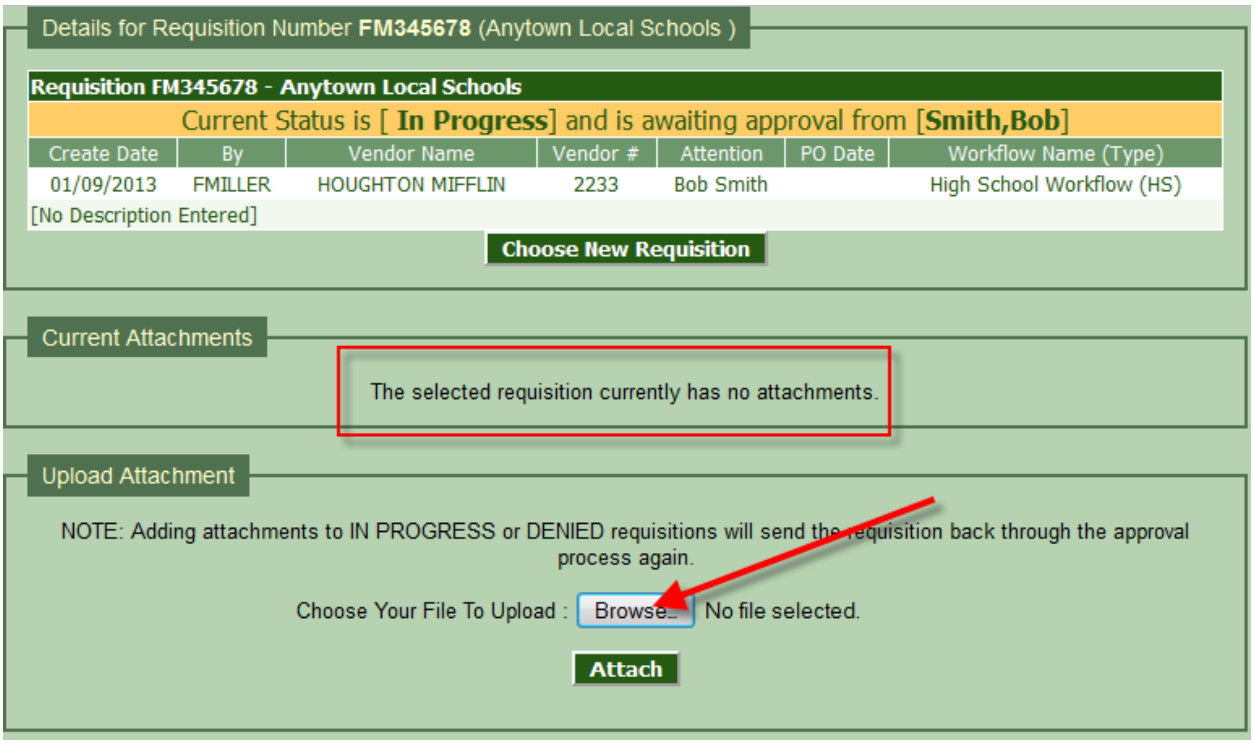
Some requisitions may require additional documentation to go along with them. You can attach any type of document (PDF, Word, Excel) as long as you have it in electronic format. Most copiers will scan-to-email or scan-to-network so you can convert paper documents into PDF format.

To add the attachment, choose **Manage…Requisition Attachments**. Here you have two choices. You can hand-enter the requisition number in the upper box, or select from your In Progress requisitions from the drop-down list. If you want to attach a document to a requisition BEFORE it imports into RAM, you must hand-enter the requisition number. Once the requisition imports to RAM, it will then be paired up with the attachment(s).



After choosing your requisition number, click “Next”.

On the next screen, you will see there are no attachments currently on this requisition. Click the Browse, button, and find and select your document. Click Attach to add the document to this requisition. There is no limit to the number of attachments you can add to a requisition.



You can remove an attachment by clicking the red **X** beside the attachment.

NOTE: Adding or deleting an attachment will cause any IN PROGRESS requisitions to restart the approval process over again.

Attachment Rules

The following rules are enforced by RAM when adding attachments to requisitions:

1. ANYONE can add an attachment to a requisition that does not yet exist in RAM by simply enter the requisition number then adding an attachment. This is done so the person creating the requisition can be pro-active and immediately attach things in RAM, though the export from USAS to RAM has not yet occurred. However, since RAM has no idea yet who actually OWNS that requisition, it allows anyone to attach things at this point.

2. For requisitions that do not yet exist in RAM, for security purposes, NO ONE can delete attachments from that requisition other than the district RAM administrator.

3. No one can view attachments on requisitions that have not yet loaded into RAM. There is no way to determine if the person trying to view the attachment has authority to see it, as we don't yet know who created and owns the requisition.

4. Once the requisition loads into RAM, only the original requestor of the requisition or the district RAM administrator can add or remove attachments.

5. Adding or removing an attachment from an EXISTING, IN PROGRESS requisition will resubmit the requisition back through the approval process. This is necessary to prevent someone from changing the attached information AFTER it has already been approved by someone on the workflow. Each person in the workflow gets a chance to re-review the attachment(s) if it (they) should change.

6. NO ONE can add or remove an attachment from a requisition that has been APPROVED by the final approver. The attachments become a historical record at that point and cannot be altered.

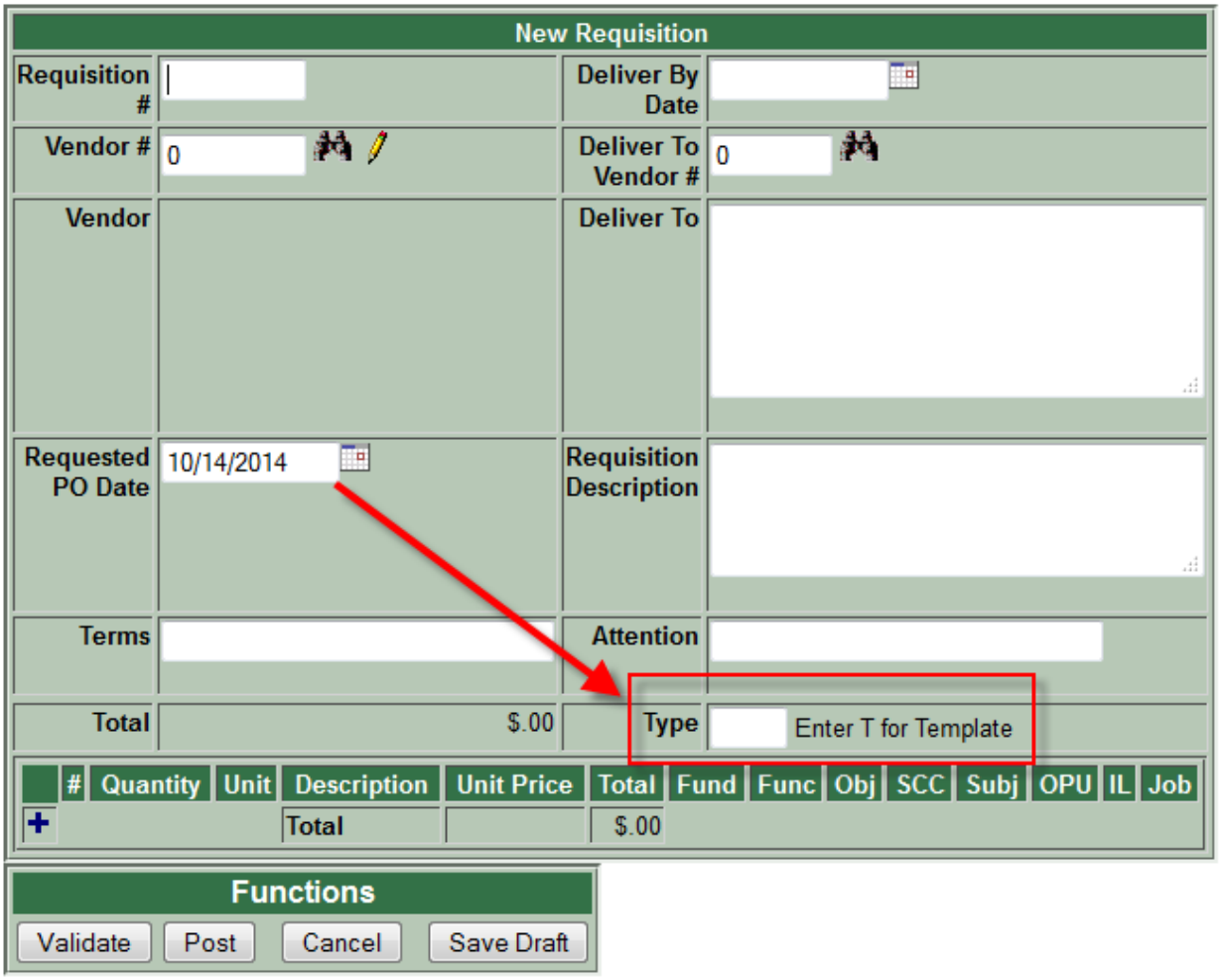
Directing Requisitions to Certain Workflows

When you enter a requisition in USAS, you can direct it to a workflow by one of two ways:

1. By Username
2. By Type Code

Your district administrator may assign people as Members of a workflow. Any requisitions entered by that person will automatically go to the workflow they are a member of. **NOTE: An employee can only be a member of ONE workflow at a time.**

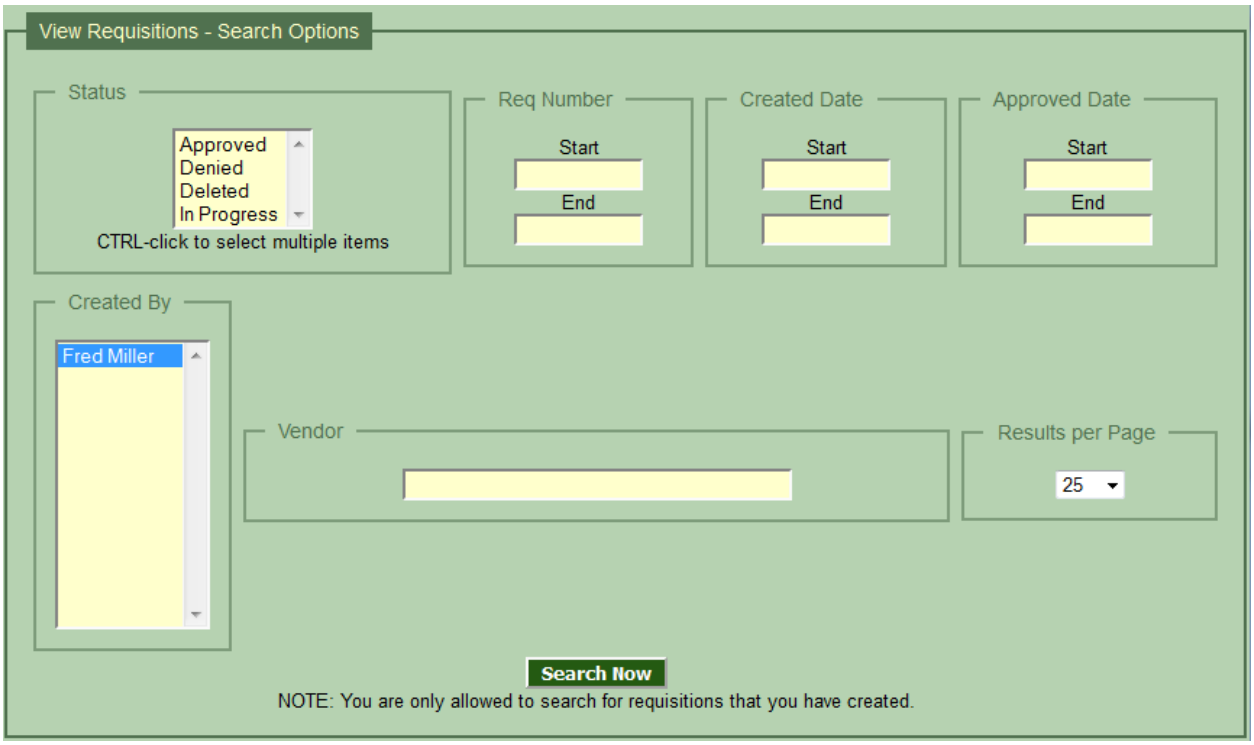
If you need to send a requisition to a different workflow than the one you are a member of, you must assign that requisition a "TYPE" on the USAS or USASWeb ***new requisition*** screen.



The type codes scheme is determined by each district, so the codes used can be different from one district to the next. Therefore you will not find codes listed in this document. Please ask your treasurer's office for the ***Type*** codes in use by your district.

Viewing Requisitions

Go to **View..Requisitions** to search for requisitions and see their status in RAM. Fill in the search criteria and click **Search Now.**



Status Choose one or more items from the status block to view only requisitions that have that status. For example, choosing "In Progress" and clicking Search Now will show you all active requisitions awaiting approval for your district.

Req Number Search for specific from/to requisition numbers

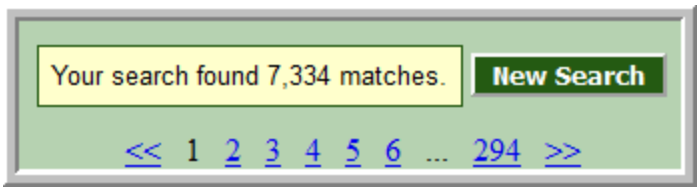
Created Date Enter either a start date, end date, or both when the requisition was created.

Approved Date Enter either a start date, end date, or both when the requisition was approve. This only applies to APPROVED requisitions.

Created By **Submitters of requisitions can only search for their OWN requisitions.**

Vendor Enter all or part of a vendor name to find requisitions for that vendor. You do not need to enter any wildcard characters. Entering ***get*** would find both "Target" and "Gettysburg", for example.

Results per page Choose how many search results you want returned on a single page.



If your search finds a large number of requisitions, you can use the page navigation buttons at the top of the screen to move between pages (the size of a page will depend on what you selected under **Results Per Page** when doing the search).

<<	Takes you to page one of the search
>>	Takes you to the very last page of the search
Page Number	Clicking a number takes you directly to that page. The last page number to the right is the total number of pages that were returned.

Email Notifications

When a requisition you enter in RAM is approved by the FINAL approver, you will get an email letting you know. You will NOT get emails when other approvers in the workflow approve it, only when the FINAL approver approves the requisition. You will be emailed immediately if someone DENIES your requisition or if someone adds comments.

Section Two

Requisition Approvers

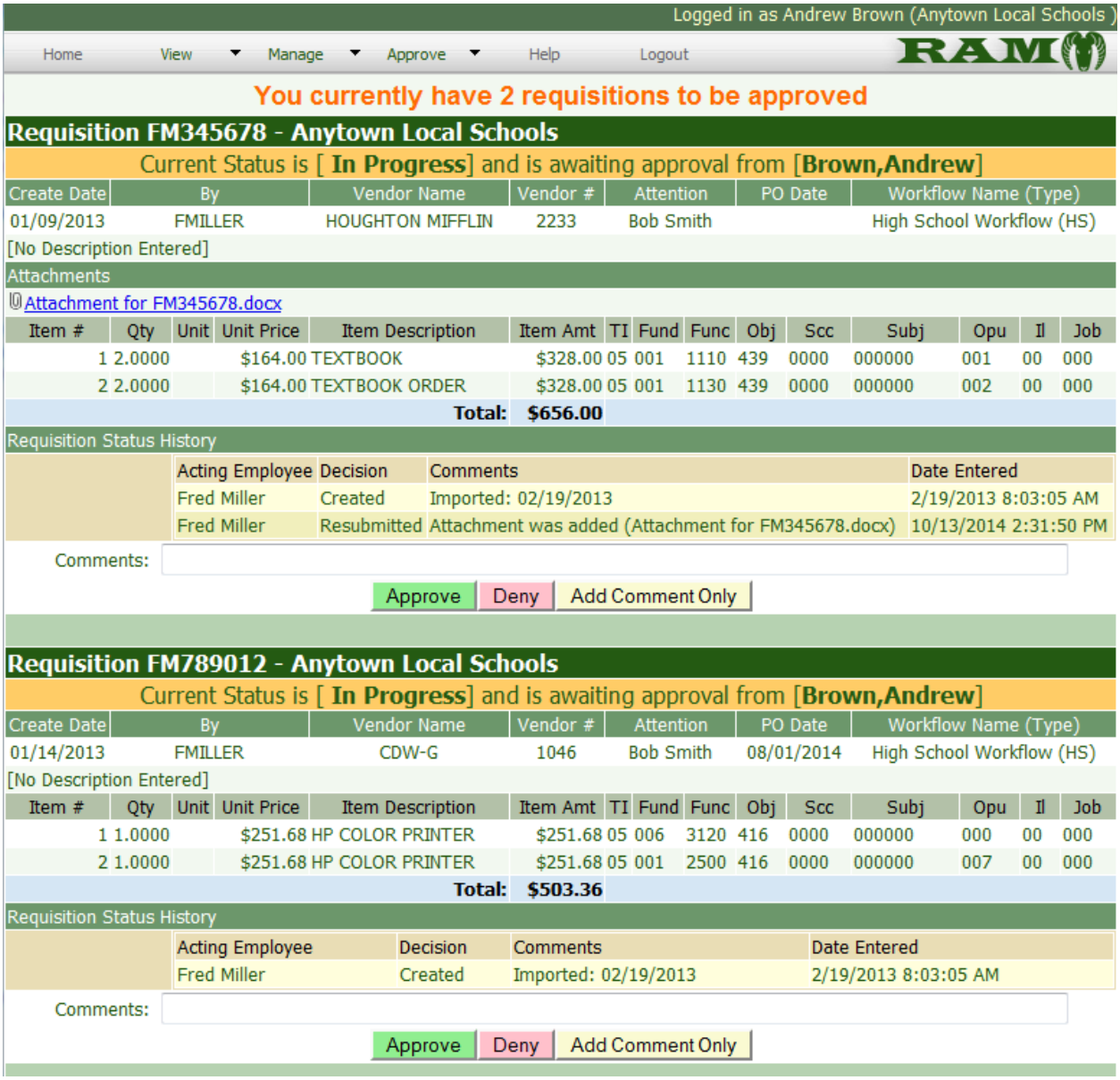
This section of the manual covers items that requisition Approvers will need to know when using RAM.

Approvers

Approving Requisitions

To approve requisitions, go to **Approve…Requisitions** in the menu. You will see a list of all requisitions to be approved, as in the example below.

You will not see a requisition in your list to approve until all other approvers before you in the workflow have approved it.



Logged in as Andrew Brown (Anytown Local Schools)

Home | View | Manage | Approve | Help | Logout

RAM

You currently have 2 requisitions to be approved

Requisition FM345678 - Anytown Local Schools

Current Status is [**In Progress**] and is awaiting approval from [**Brown,Andrew**]

Create Date	By	Vendor Name	Vendor #	Attention	PO Date	Workflow Name (Type)
01/09/2013	FMILLER	HOUGHTON MIFFLIN	2233	Bob Smith		High School Workflow (HS)

[No Description Entered]

Attachments

Attachment for FM345678.docx

Item #	Qty	Unit	Unit Price	Item Description	Item Amt	TI	Fund	Func	Obj	Scc	Subj	Opu	Il	Job
1	2.0000		$164.00	TEXTBOOK	$328.00	05	001	1110	439	0000	000000	001	00	000
2	2.0000		$164.00	TEXTBOOK ORDER	$328.00	05	001	1130	439	0000	000000	002	00	000
				Total:	**$656.00**									

Requisition Status History

Acting Employee	Decision	Comments	Date Entered
Fred Miller	Created	Imported: 02/19/2013	2/19/2013 8:03:05 AM
Fred Miller	Resubmitted	Attachment was added (Attachment for FM345678.docx)	10/13/2014 2:31:50 PM

Comments:

Approve | Deny | Add Comment Only

Requisition FM789012 - Anytown Local Schools

Current Status is [**In Progress**] and is awaiting approval from [**Brown,Andrew**]

Create Date	By	Vendor Name	Vendor #	Attention	PO Date	Workflow Name (Type)
01/14/2013	FMILLER	CDW-G	1046	Bob Smith	08/01/2014	High School Workflow (HS)

[No Description Entered]

Item #	Qty	Unit	Unit Price	Item Description	Item Amt	TI	Fund	Func	Obj	Scc	Subj	Opu	Il	Job
1	1.0000		$251.68	HP COLOR PRINTER	$251.68	05	006	3120	416	0000	000000	000	00	000
2	1.0000		$251.68	HP COLOR PRINTER	$251.68	05	001	2500	416	0000	000000	007	00	000
				Total:	**$503.36**									

Requisition Status History

Acting Employee	Decision	Comments	Date Entered
Fred Miller	Created	Imported: 02/19/2013	2/19/2013 8:03:05 AM

Comments:

Approve | Deny | Add Comment Only

Each requisition will have its own set of Approve, Deny, or Add Comment Only buttons. As you click Approve or Deny on a requisition, the requisition will disappear from your list.

You can add comments when you Approve and Deny, not just when you click Add Comment. Just fill in your comment and click Approve or Deny.

If you wish to ONLY add comments, add the comment in the box, and then click the "Add Comment Only" button immediately to save the comment. The requisition will remain on your screen, because you have only commented on it, but not made a decision to Approve or Deny. The requisition will remain awaiting approval from you until you take one of these two actions (Approve or Deny).

Do not add all of your comments on all of the requisitions at once, and then click an Add Comment Only button. This will only save the comment in the box next to the button you click. All other comments will be lost.

The bottom portion of a requisition shows the status history. This is a record of all events that have happened to this requisition in RAM, from creation to approval.

Requisition Status History

Acting Employee	Decision	Comments	Date Entered
Fred Miller	Created	Imported: 02/19/2013	2/19/2013 8:03:05 AM
Fred Miller	Resubmitted	Attachment was added (Attachment for FM345678.docx)	10/14/2014 12:28:17 PM
Andrew Brown	Approved		10/15/2014 8:28:25 AM
Janet Jones	Approved		10/15/2014 8:28:34 AM

Comments:

Approve | Deny | Add Comment Only

If the person who submits the requisition changes anything on it while it is IN PROGRESS, it will be resubmitted back to the first approver in the list. This is normal. The reason for the resubmit will be shown in the history, as in the above example (resubmitted because an attachment was added).

Alternate Approval Methods

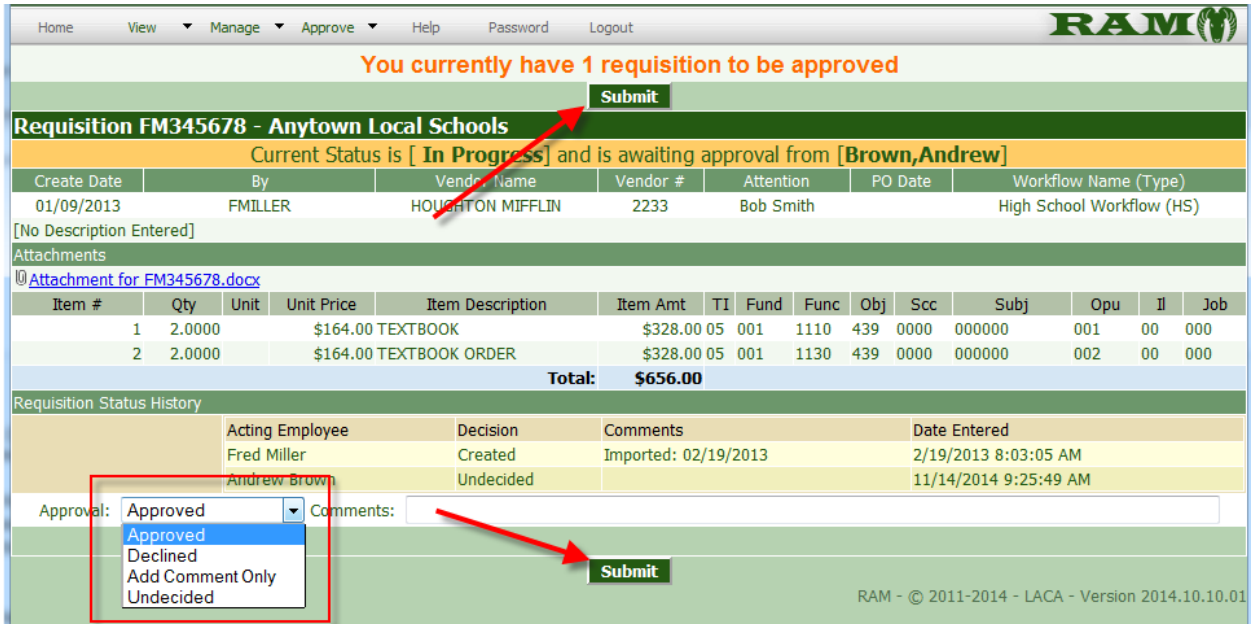
There are three different methods of approving requisitions that can be configured on a district-wide or individual basis.

Method One – Buttons

Each requisition has its own APPROVE, DENY, or ADD COMMENT button. You click on one of these buttons for each requisition. This method allows you to quickly go to the approve screen and approve just one or two individual requisitions, and helps eliminate accidentally approving a requisition you did not mean to approve when they are submitted in bulk. **NOTE: This is the default method used for the 2014 version of RAM, and the method described on the previous pages.**

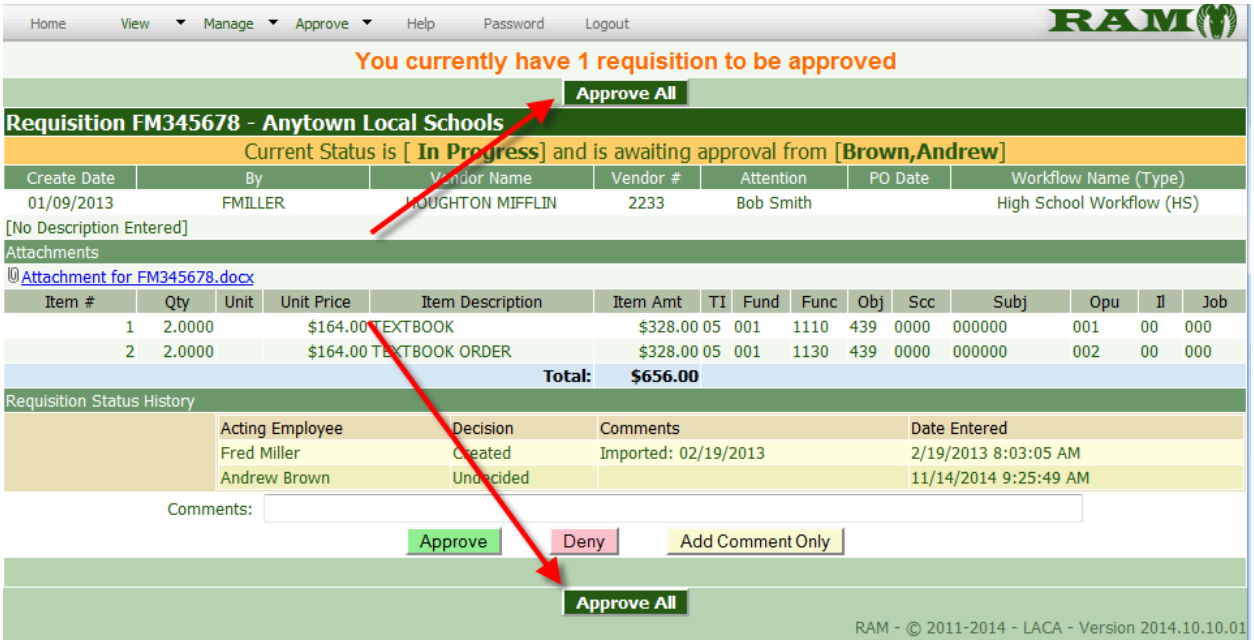
Method Two – Drop Down Menus (Classic style)

This is the same method used in the previous version of RAM, where each requisition had a drop-down menu of four choices. APPROVE, DENY, ADD COMMENT, or UNDECIDED. Each requisition needs to have the drop-down menu set to the correct action, then a final SUBMIT button is pressed to submit all requisitions at once. Note that there are Submit buttons at both the top and bottom of the screen. Pressing either one will perform the same action, so choose whichever of the two buttons is most handy.



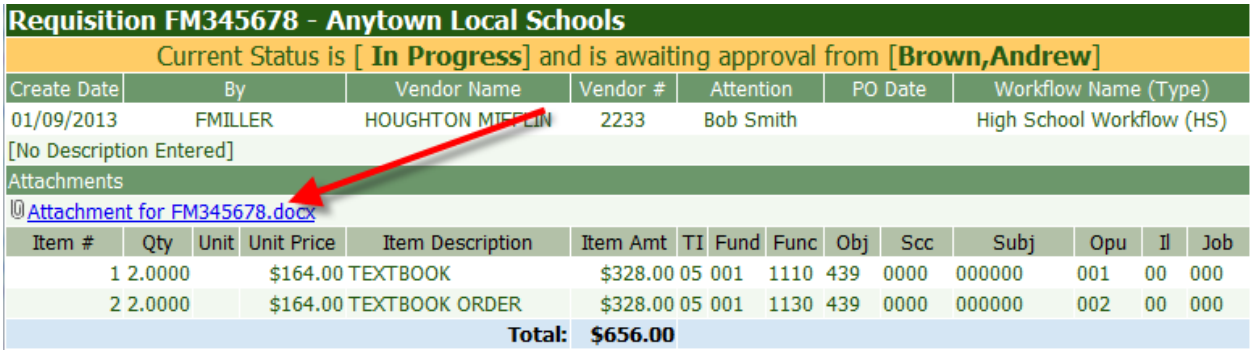
Method Three – Buttons, but with "Approve All" option

Same as Method One, but an ***Approve All*** button is added, allowing Approvers to quickly approve all requisitions at once, if so desired. Note that there are ***Approve All*** buttons at both the top and bottom of the screen. Pressing either one will perform the same action, so choose whichever of the two buttons is most handy.



Viewing Attachments

Some requisitions may have attachments that were added by the person who submitted the requisition. This attachment contains information that could not be entered into the requisition itself. Click the attachment name to view the information in the attachment before approving the requisition.



NOTE: You must have appropriate software loaded on your computer to view the attachment. For example, if the attachment is an Excel spreadsheet, you must have Excel installed to view it.

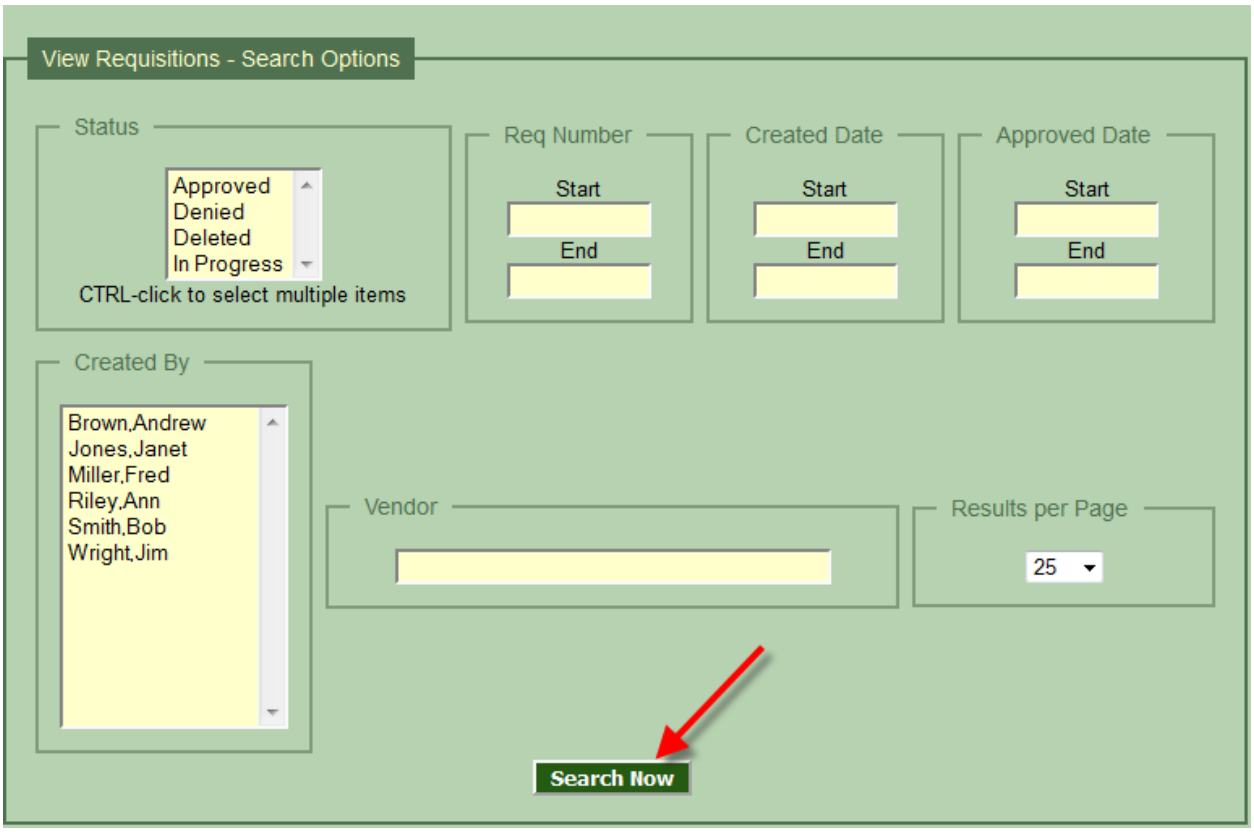
Finished Approving Requisitions

If you finish approving requisitions, or if you have no requisitions to approve, you will see the following message:

Viewing Requisitions

Go to **View..Requisitions** to search for requisitions and see their status in RAM. Fill in the search criteria and click **Search Now.**

Approvers can only search for and view requisitions that belong to workflows the approver is a member of.



Status Choose one or more items from the status block to view only requisitions that have that status. For example, choosing "In Progress" and clicking Search Now will show you all active requisitions awaiting approval for your district.

Req Number Search for specific from/to requisition numbers

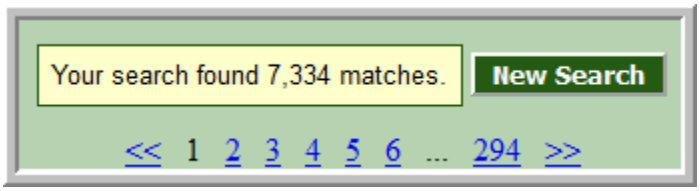
Created Date Enter either a start date, end date, or both when the requisition was created.

Approved Date Enter either a start date, end date, or both when the requisition was approve. This only applies to APPROVED requisitions.

Created By Choose one or more submitters to view requisitions entered by those submitters.

Vendor Enter all or part of a vendor name to find requisitions for that vendor. You do not need to enter any wildcard characters. Entering ***get*** would find both "Target" and "Gettysburg", for example.

Results per page Choose how many search results you want returned on a single page.



If your search finds a large number of requisitions, you can use the page navigation buttons at the top of the screen to move between pages (the size of a page will depend on what you selected under **Results Per Page** when doing the search).

<< Takes you to page one of the search

>> Takes you to the very last page of the search

Page Number Clicking a number takes you directly to that page. The last page number to the right is the total number of pages that were returned.

Section Three

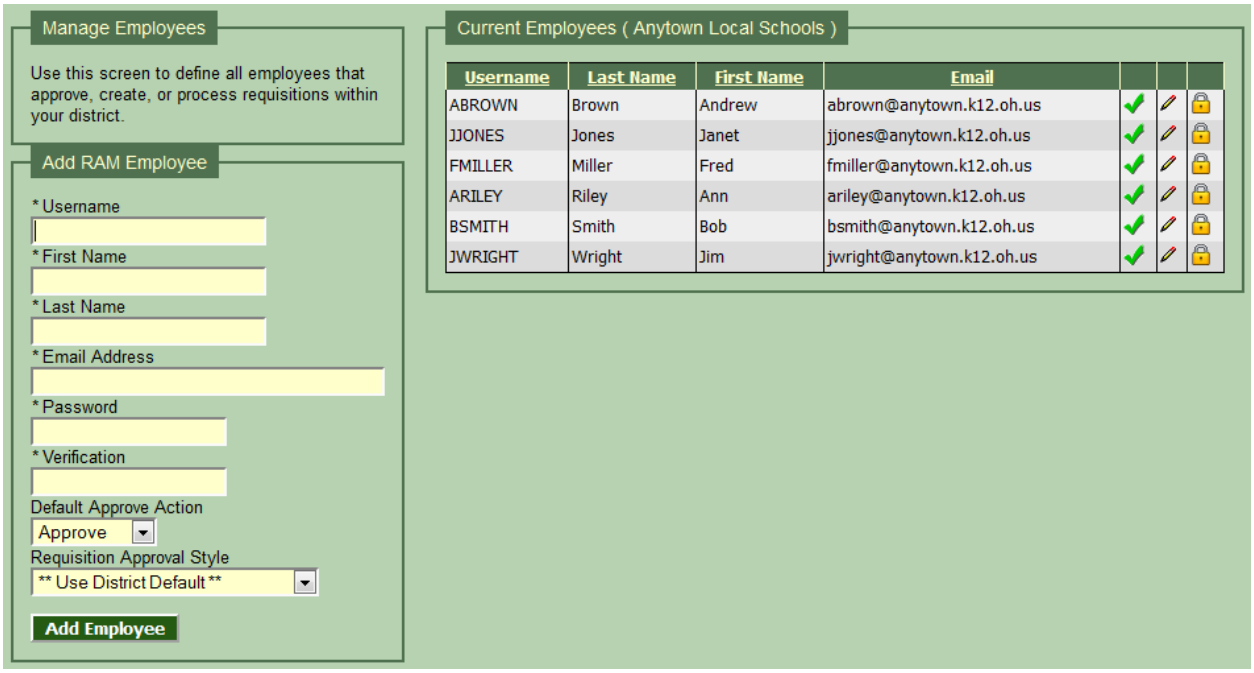
RAM Administrators

This section of the manual covers items that RAM Administrators will need to know when configuring and managing RAM.

RAM District Administrators

Managing Employees

Go to **Administrator….Manage Employees**. The left side of the screen has a form to enter new employees. The list on the right side shows CURRENT employees entered in the system.



Adding an Employee

You must add an employee to RAM before they can submit or approve requisitions. Simply fill out the form, and click Add Employee to add a new employee to RAM. Username must match the employees existing USAS username, if they have one. **NOTE: Approvers may not have a USAS username, but anyone submitting requisitions will need to have a USAS username to use with USAS or USASWeb. You can enter any username you want for Approvers that do not have existing USAS usernames.**

There are also two options you can set on a user-by-user basis.

Default Approve Action

This is only relevant if you use the Classic style of Approval s (drop-down menus rather than individual buttons). Does the user want all dropdowns initially set to “Approve”, and change a few to Undecided to skip them (this is the default), or does the user want all dropdowns initially set to “Undecided” and must change them to Approved on only the requisitions they want to approve? If an approver finds themselves changing a majority of requisitions to “Undecided” each time, and only approving a few, then this option might work for them. This user might actually be better suited to use the “BUTTONS” method of approval instead of the CLASSIC drop-downs.

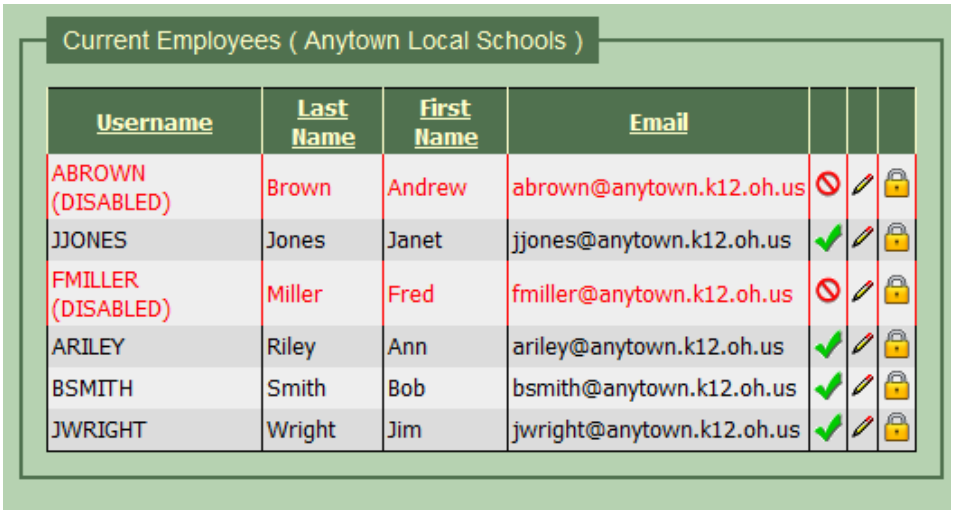
Requisition Approval Style

Choose between **Classic** (the previous RAM Drop-down menu method, with a single Submit button), **Buttons** (the new style where each requisition has its own APPROVE, DENY, and ADD COMMENT button, and **Buttons with Approve All Button** (same as Buttons, but adds an Approve All button for quick approval of every requisition in the list). If you leave it on "** Use District Default **" the user will use whichever style is selected on the "Administrator…District Options" screen.

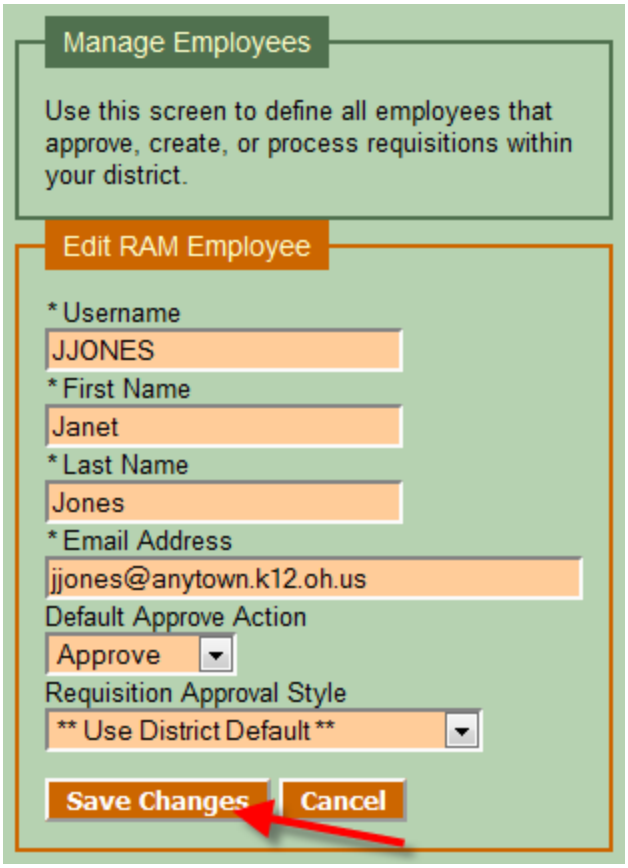
Click the icons beside an employee to perform one of the following actions:

Enable/Disable (employees cannot be deleted, as the information in RAM history uses the information from this table to report that approved/denied/created requisitions). Clicking once will disable an employee, clicking again will enable the employee.

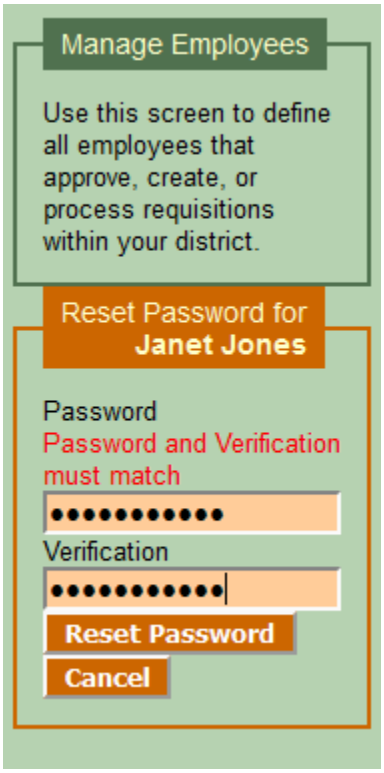
Example: Disabled Employees



Edit employee information. Click the "pencil" icon to edit employee information. You can change their username, name, or email address here. This is necessary if you misspell a name when entering the employee, or if an employee gets married and needs a name change. You can also change options like the Default Approve Action (for the Classic approval method) and which approval style this user will use. Be sure to click **Save Changes** when you are done making your changes.

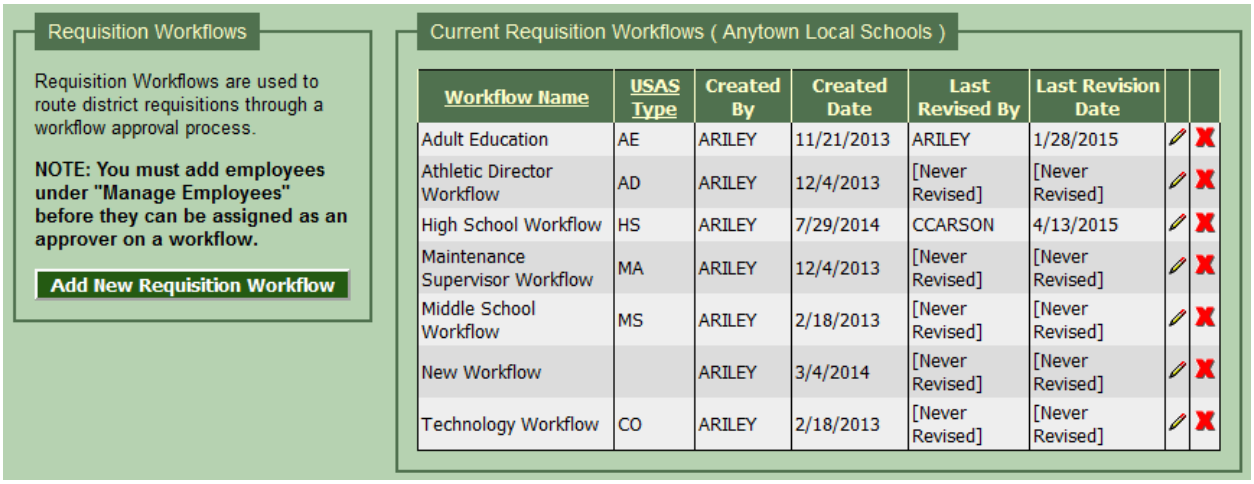


Reset employee's RAM password. Use this icon to reset an employee's password if they forget their RAM password. Type the new password twice then click **Reset Password**.



Managing Requisition Workflows

To add or manage workflows, go to **Administrator…Manage Workflows.** You will see a table of existing workflows. From this screen you can Add, Edit, or Delete a workflow.



Requisition Workflows

Requisition Workflows are used to route district requisitions through a workflow approval process.

NOTE: You must add employees under "Manage Employees" before they can be assigned as an approver on a workflow.

Add New Requisition Workflow

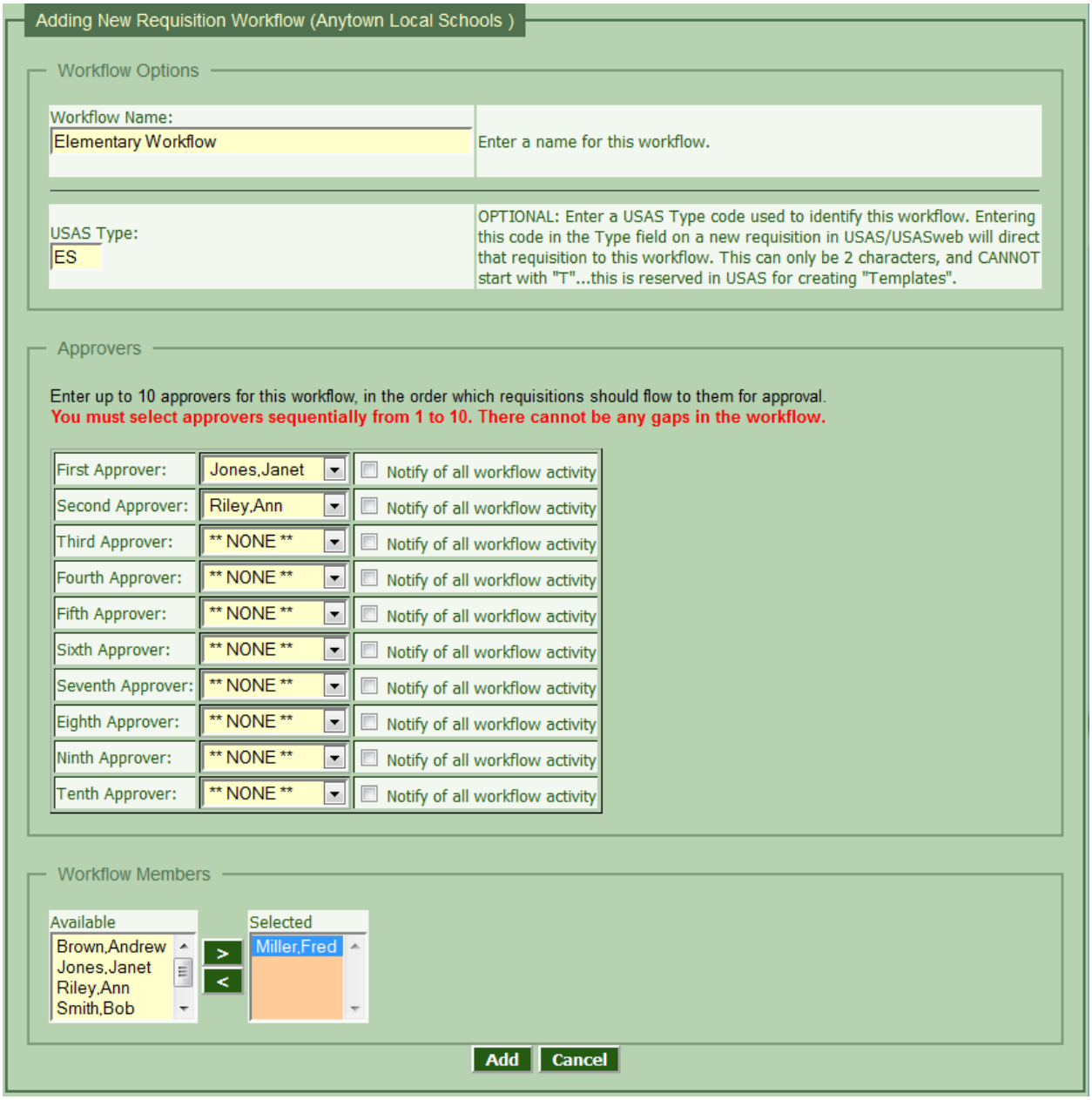
Current Requisition Workflows (Anytown Local Schools)

Workflow Name	USAS Type	Created By	Created Date	Last Revised By	Last Revision Date		
Adult Education	AE	ARILEY	11/21/2013	ARILEY	1/28/2015		
Athletic Director Workflow	AD	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
High School Workflow	HS	ARILEY	7/29/2014	CCARSON	4/13/2015		
Maintenance Supervisor Workflow	MA	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
Middle School Workflow	MS	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		
New Workflow		ARILEY	3/4/2014	[Never Revised]	[Never Revised]		
Technology Workflow	CO	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		

Adding a Workflow

Click the button **Add New Requisition Workflow** to add a workflow. Give it a name. It is recommended that you give each workflow a USAS Type code (two letters or digits). This allows users entering requisitions into USAS to direct it to this workflow simply by coding it with the workflow's USAS Type code.

Choose up to 10 approvers in the list. <u>You CAN enter the same approver multiple times in the workflow if you wish.</u> A treasurer could be first and last in a workflow, looking over all incoming requisitions FIRST for obvious errors before sending it on to the other employees. The treasurer would then see the requisition a 2nd time for the final approval.



USAS Type Codes cannot begin with "T". This is a limit caused by USAS. A type code of "T" creates a "template" requisition in USAS. Therefore, you cannot enter any type code in USAS or USASWeb starting with a "T". Make sure you do not use any USAS Type codes in RAM that start with "T".

Workflow Members should only be used when a majority of the requisitions entered by this user go to this workflow. Users added as members do not need to enter USAS Type codes…their requisitions will be directed to this workflow because they are members of the workflow.

Editing a Workflow

Click the icon to edit a workflow. This will bring up the same screen as Adding a workflow, allowing you to make changes.

Workflow Name	USAS Type	Created By	Created Date	Last Revised By	Last Revision Date		
Adult Education	AE	ARILEY	11/21/2013	ARILEY	1/28/2015		
Athletic Director Workflow	AD	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
High School Workflow	HS	ARILEY	7/29/2014	CCARSON	4/13/2015		
Maintenance Supervisor Workflow	MA	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
Middle School Workflow	MS	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		
New Workflow		ARILEY	3/4/2014	[Never Revised]	[Never Revised]		
Technology Workflow	CO	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		

NOTE: If the workflow you are editing has any IN PROGRESS requisitions, these will show at the top of the Edit screen.

Editing Requisition Workflow (Anytown Local Schools)

Current Requisitions in Progress

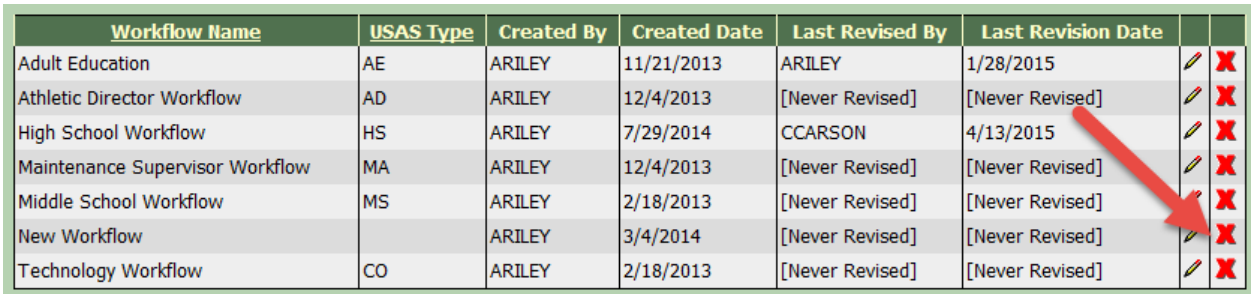
The following requisitions are currently in progress and using this workflow.
As you alter Approvers in the workflow, this table will update to show you the effect your changes will have.

Req Num	Description	Created By	Created Date	Awaiting Approval From
FM345678	[No Description]	FMILLER	2/19/2013	Brown,Andrew
FM789012	[No Description]	FMILLER	2/19/2013	Brown,Andrew

As you change the approvers and click **Update**, the list of In Progress requisitions at the top will change to show the effect your changes will have on the workflow.

Deleting a Workflow

Click the red **X** beside a workflow to delete that workflow, if it is no longer needed.



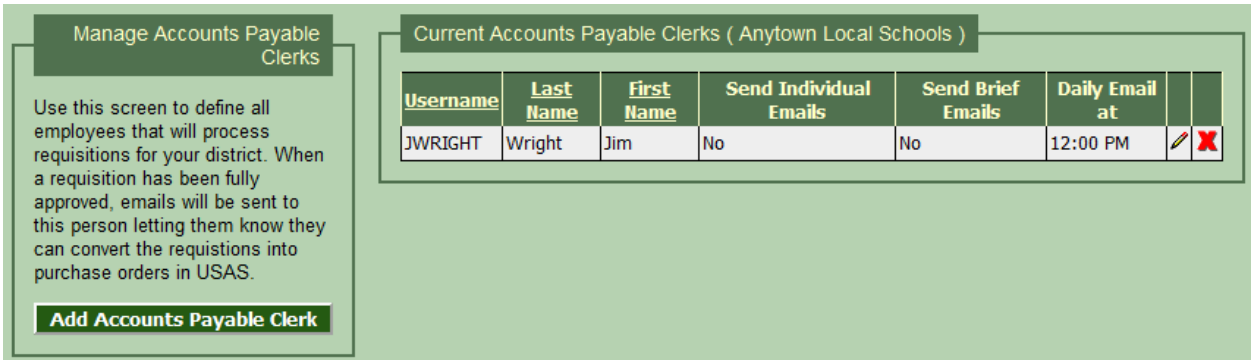
Workflow Name	USAS Type	Created By	Created Date	Last Revised By	Last Revision Date		
Adult Education	AE	ARILEY	11/21/2013	ARILEY	1/28/2015		
Athletic Director Workflow	AD	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
High School Workflow	HS	ARILEY	7/29/2014	CCARSON	4/13/2015		
Maintenance Supervisor Workflow	MA	ARILEY	12/4/2013	[Never Revised]	[Never Revised]		
Middle School Workflow	MS	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		
New Workflow		ARILEY	3/4/2014	[Never Revised]	[Never Revised]		
Technology Workflow	CO	ARILEY	2/18/2013	[Never Revised]	[Never Revised]		

If there are requisitions currently “IN PROGESS” for that workflow, you will not be able to delete it, and will receive a message letting you know how many requisitions are still in progress.

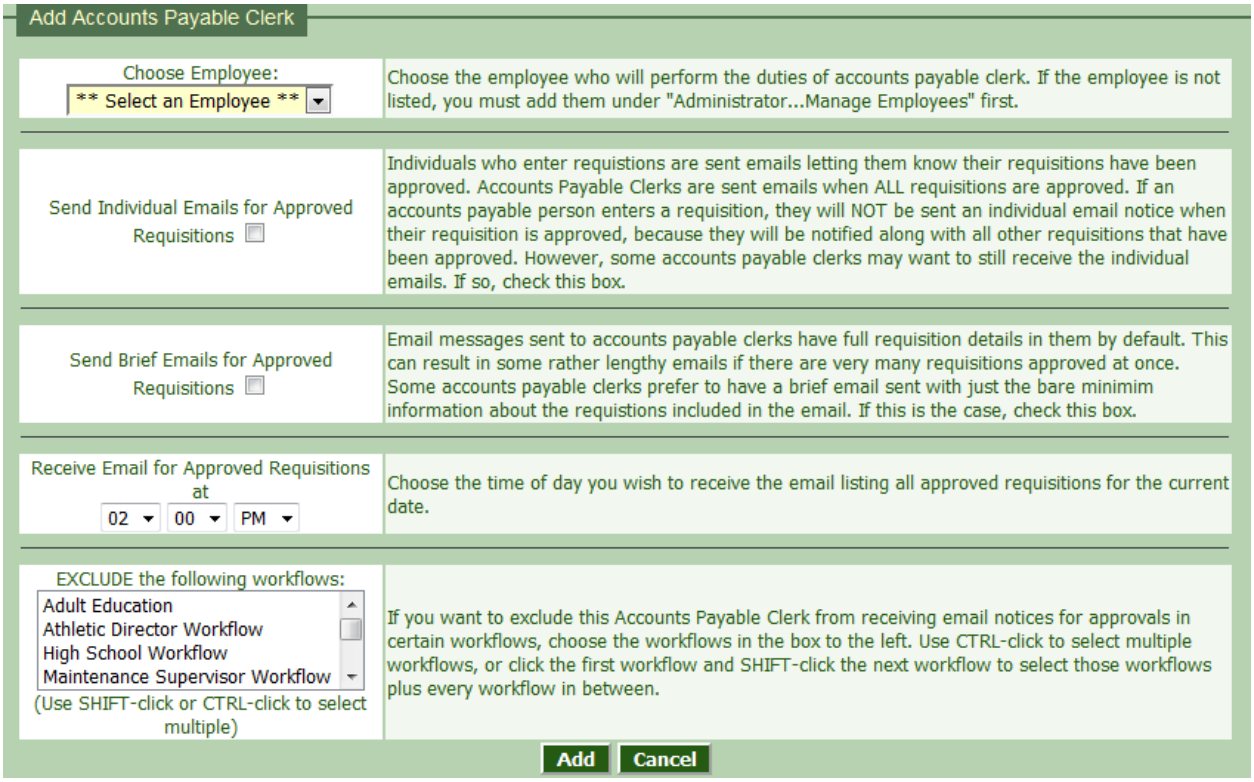
Cannot delete this workflow. It has 2 requisition(s) still IN PROGRESS. Edit this workflow to view the requisitions.

Managing Accounts Payable Clerks

Accounts Payable Clerks will receive emails when the FINAL approver in a workflow approves a requisition. The email will show the requisitions that were approved and ready to be converted into Purchase Orders.



To add a new Accounts Payable Clerk, click the **Add Accounts Payable Clerk** button.



Choose Employee Choose the employee to be assigned as Accounts Payable Clerk.

Send Individual Emails for Approved Requisitions

Select this checkbox if this person wants to receive notices that their requisitions have been approved. For accounts payable clerks, this is redundant, as they will get notices showing the final approval of ALL requisitions.

Send Brief Emails

Brief emails listing the requisitions that were approved leave out the requisition detail (individual line items) in the email, resulting in shorter emails. If the Accounts Payable Clerk prints these emails out, and this information is not necessary to have, it could save on paper and resources by using brief emails.

Receive Email for Approve Requisitions at:

Choose a time of day to send all of the final approvals to the Accounts Payable Clerk. Approval notices are stored up and sent all at once, one time per day. This eliminates multiple emails throughout the day of requisitions to be converted into purchase orders.

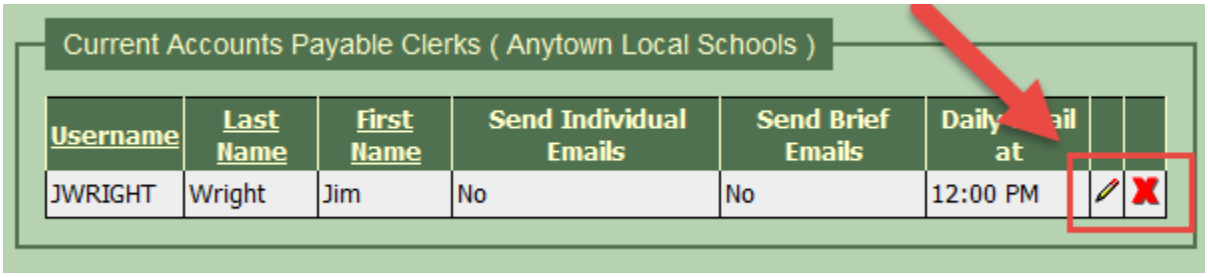
Exclude the Following Workflows

When a requisition is approved by the FINAL approver, an email message is sent to the Accounts Payable Clerks letting them know it is ready to convert to a purchase order. If you want to assign different accounts payable clerks to split the workload, you can exclude accounts payable clerks from certain workflows. When a requisition that has passed through that workflow is approved, an email will NOT be sent to any accounts payable clerks that were excluded.

Editing and Deleting Accounts Payable Clerks

To edit settings for an accounts payable clerk, click the pencil icon.

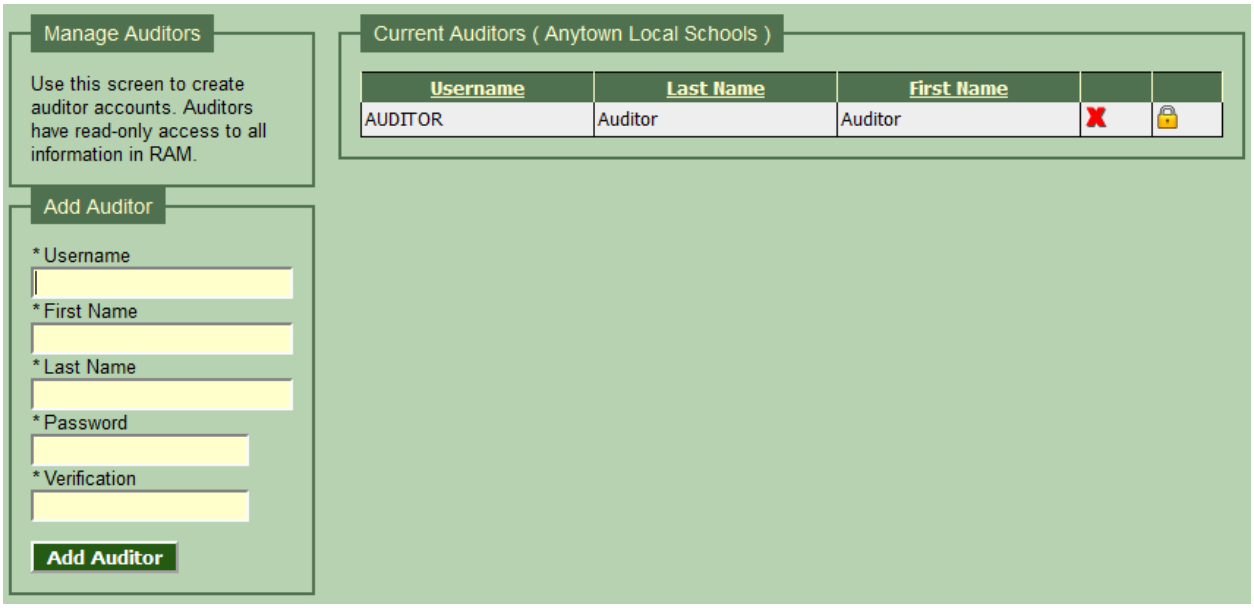
To delete an accounts payable clerk click the red **X**.



Managing Auditors

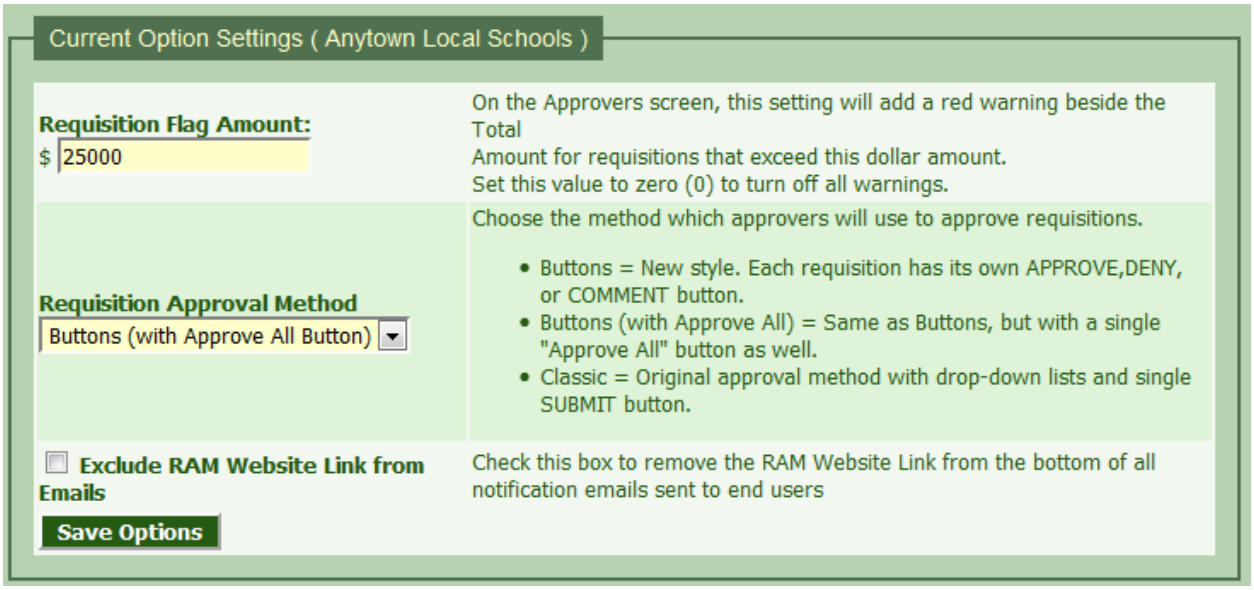
Auditors have read-only access to view ALL requisitions for your district. If you have a state auditor going through you books and you want to grant them temporary access to RAM, enter a username/password for them on this screen within the Add Auditor section, and click Add Auditor. The username must be unique within the RAM system.

When the auditor is done with their work, simply delete the account to remove access by clicking the red **X** by the auditor to be deleted. The lock icon lets you reset the auditor password if they forget it.



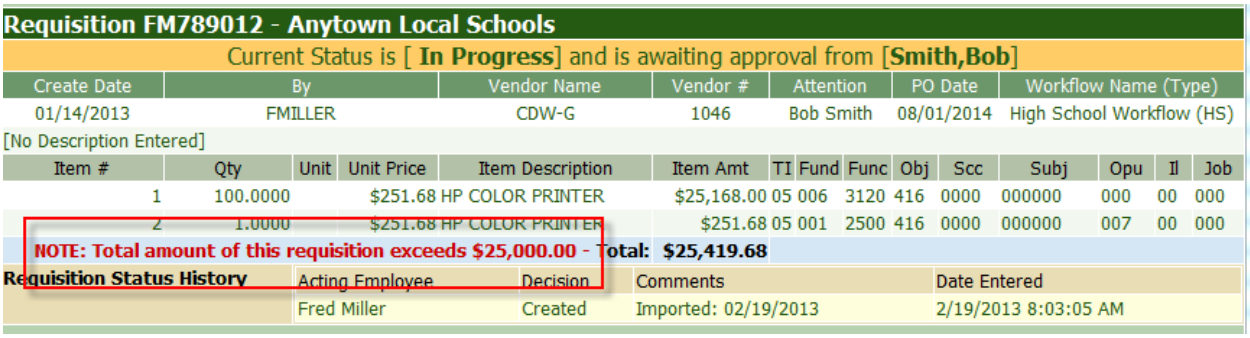
Manage District Options

This screen lets you set a few options for your district.



Requisition Flag Amount

If you want to flag warnings on the View and Approve screens for requisitions over a certain dollar amount (perhaps you have special procedures for purchases above a certain dollar amount) you can add that dollar amount here. A red warning will appear beside the Total amount on View and Approve screens. Set this to Zero (0) to disable all warnings (this is the default).

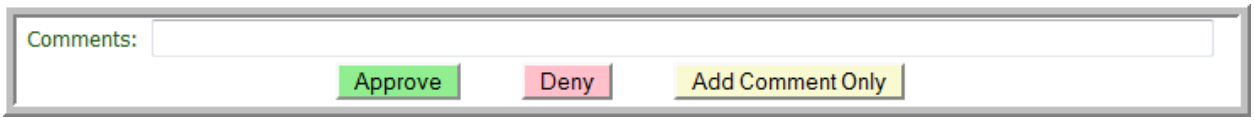


Requisition Approval Method

RAM now allows you to use three different methods to approve requisitions. You can choose whichever style fits your district's needs.

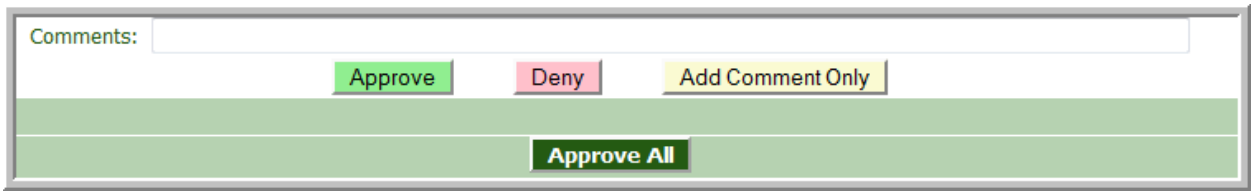
Buttons

This is the new approval method used for Documents and also for Requisitions, by default. There are individual APPROVE, DENY, and ADD COMMENT buttons for each requisition. There is not an UNDECIDED button, as it is not needed. Simply do not click any of the options and that requisition will remain on the screen until the next time you choose to approve requisitions.



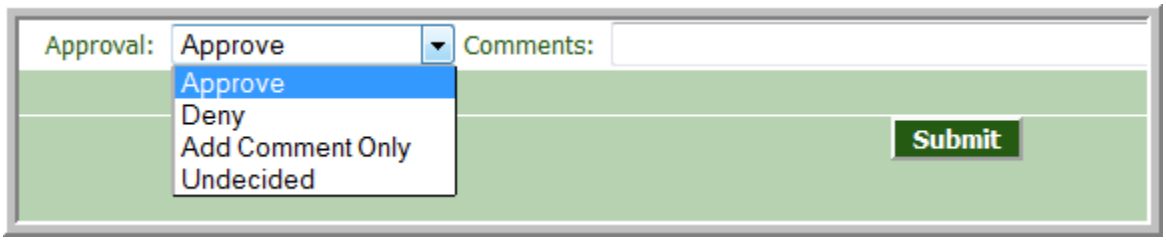
Buttons with Approval All

Same as Buttons, but with the addition of an Approve All button on the screen to allow an approver to quickly approve everything at once.



Classic (Drop-Down Lists)

This is the same style used in previous RAM versions. Each requisition has a drop-down menu set to Approve, than can be changed to Deny, Add Comment, or Undecided. There is one submit button to submit the action for ALL requisitions on the screen.

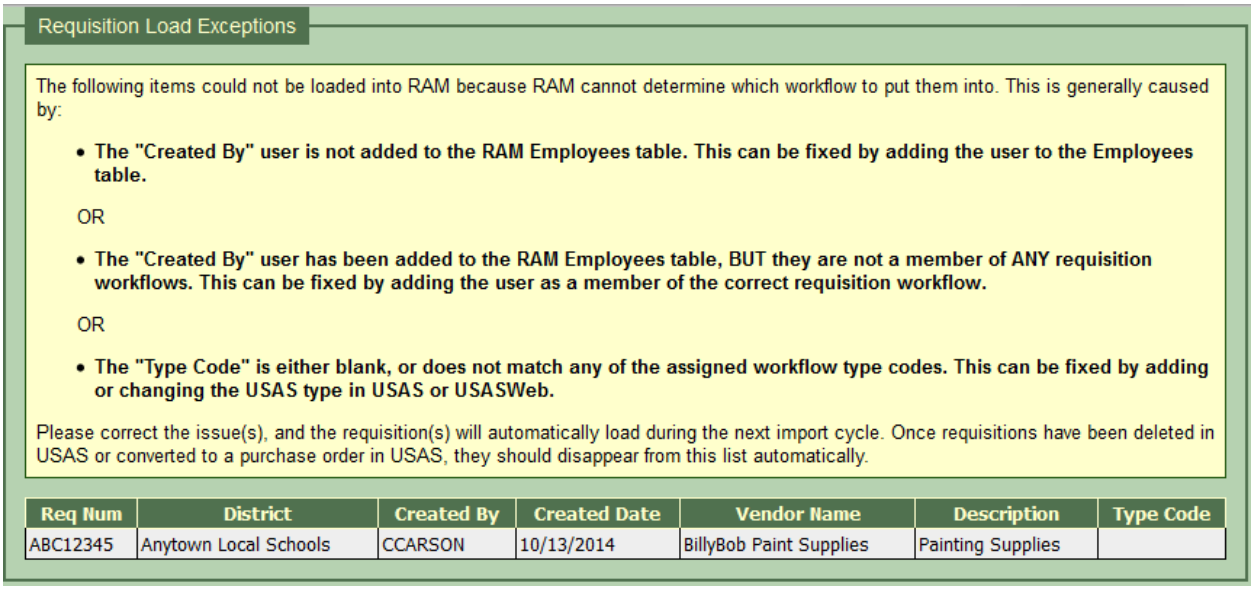


Exclude RAM Website Link from Emails

A link to the RAM website is added to the bottom of all notification emails. If you want to omit that link, click the checkbox next to “Exclude RAM Website Link from Emails”.

Requisition Load Exceptions

Anytime a requisition exports from USAS but CANNOT be assigned to a workflow in RAM, it will be added to the Exceptions screen. These issues can usually be fixed by adding the “Created By” person to the employees table, or by correcting a blank or incorrect USAS Type code on the requisition. Corrections to USAS codes must be made in USAS on the requisition. After the requisition loads into a workflow, it will disappear from the Exceptions screen.



Requisition Load Exceptions

The following items could not be loaded into RAM because RAM cannot determine which workflow to put them into. This is generally caused by:

- **The "Created By" user is not added to the RAM Employees table. This can be fixed by adding the user to the Employees table.**

OR

- **The "Created By" user has been added to the RAM Employees table, BUT they are not a member of ANY requisition workflows. This can be fixed by adding the user as a member of the correct requisition workflow.**

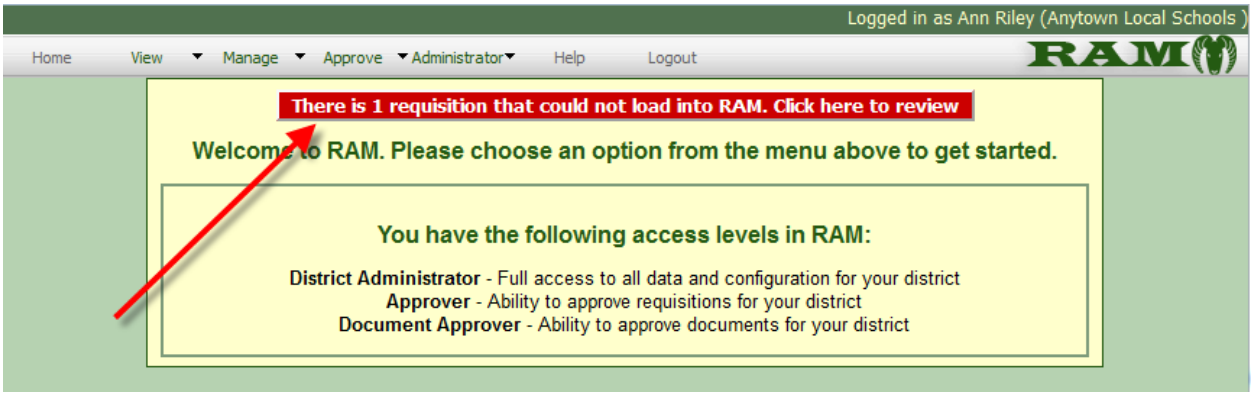
OR

- **The "Type Code" is either blank, or does not match any of the assigned workflow type codes. This can be fixed by adding or changing the USAS type in USAS or USASWeb.**

Please correct the issue(s), and the requisition(s) will automatically load during the next import cycle. Once requisitions have been deleted in USAS or converted to a purchase order in USAS, they should disappear from this list automatically.

Req Num	District	Created By	Created Date	Vendor Name	Description	Type Code
ABC12345	Anytown Local Schools	CCARSON	10/13/2014	BillyBob Paint Supplies	Painting Supplies	

District administrators will get a notice on the RAM homepage if there are exceptions. Click the red button to review the exceptions.



Section Four

Document Approvals

This section of the manual covers the new Document Approval system in RAM.

Document Approval Overview

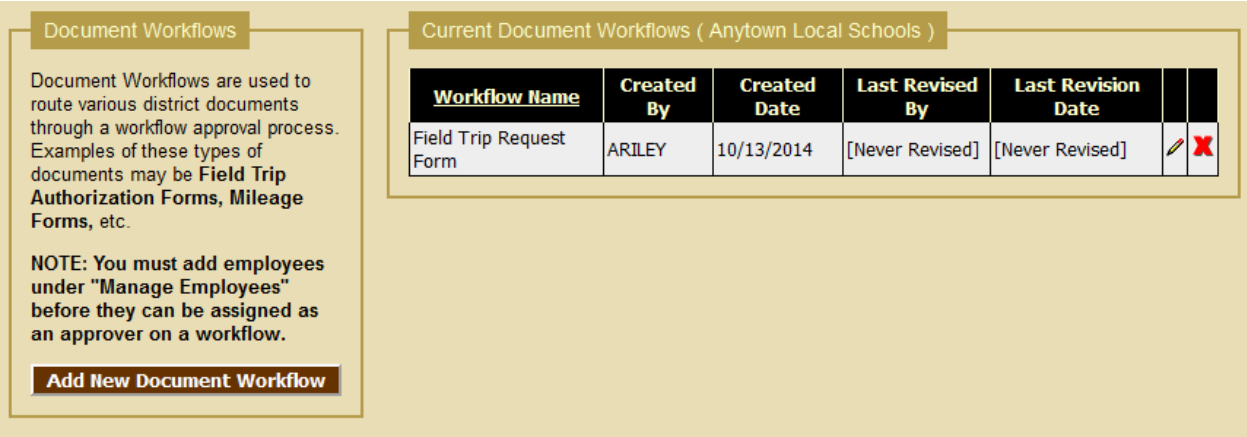
RAM now has the ability to pass ANY document through a workflow process similar to the Requistion workflow. The process is very basic, and it will be up to the creativity of the district personnel to determine ways to use this feature. Some basic ideas could be field trip permission forms or mileage sheets.

NOTE: This feature is new and still open for further development. As you begin to use this feature, if you have ideas for ways it could be changed to make it more useful for your district, please email your suggestions to ram@laca.org for consideration.

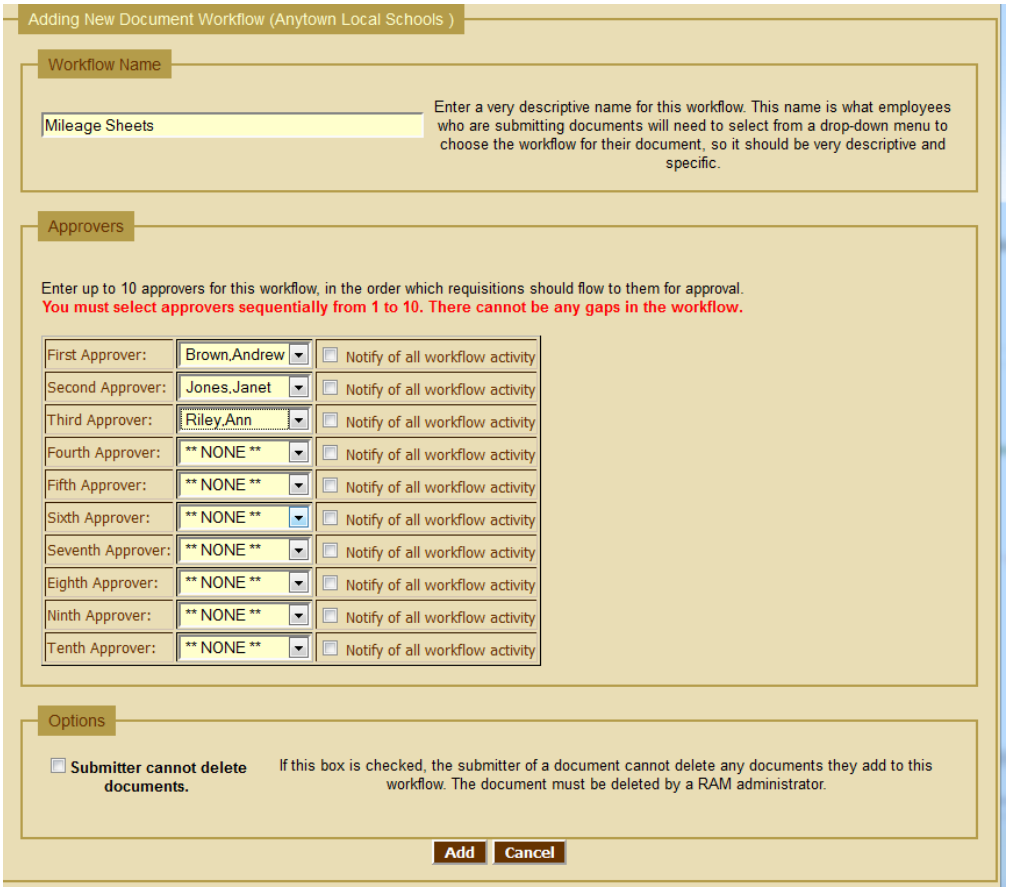
All end-user feedback is carefully reviewed and considered for future enhancements to RAM.

Document Workflow Setup

This process is very similar to the requisition workflow setup. Click **Add New Document Workflow** to add a new workflow.



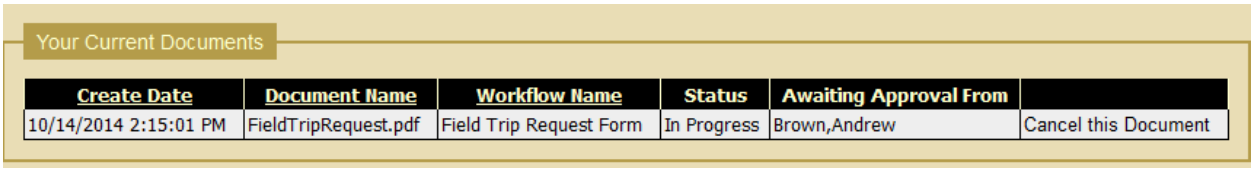
Give the workflow a name, and choose the sequence of approvers for the workflow. You can also choose whether end users can delete the documents they submit to this workflow or not.



Attaching a Document

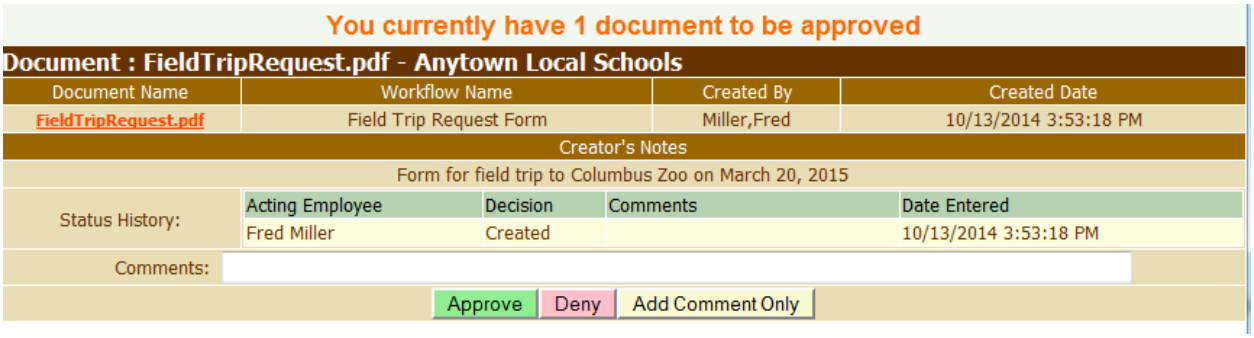
Go to Manage…Documents to submit documents to a workflow. Choose a workflow from the drop-down list. Browse for your file, and attach it. Enter any notes about your request that you want the approvers to see and consider. Then click **Submit For Approval**

After you submit a request, you documents that are IN PROGRESS will be listed on this page at the bottom. Click the "Cancel This Document" text to cancel this request.



Approving a Document

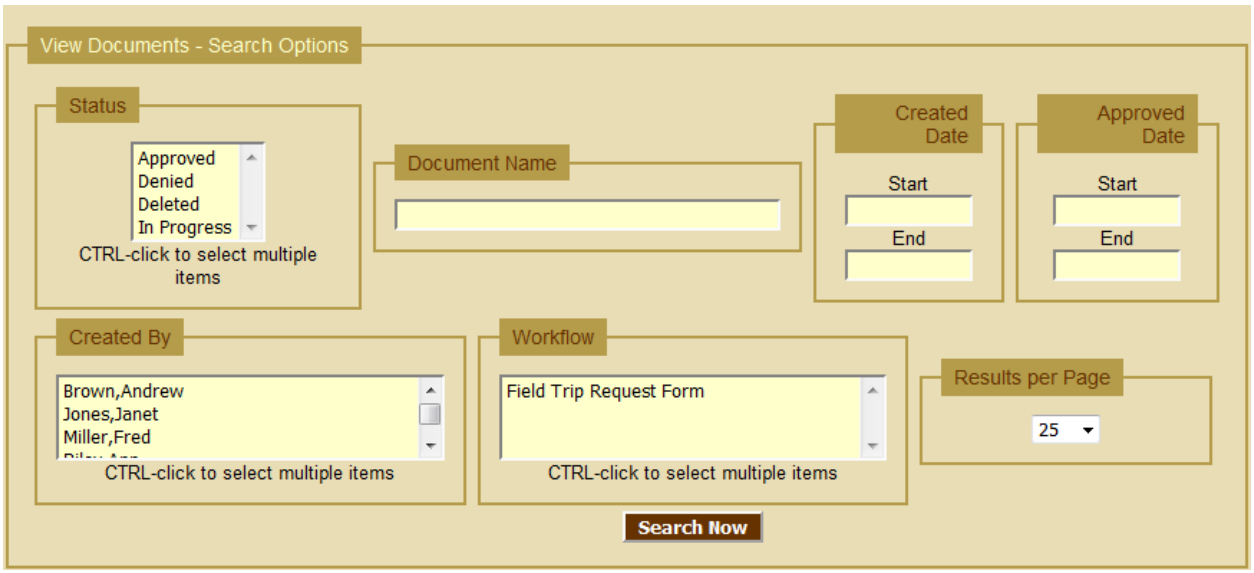
This process is the same as requisition approvals. Approvers have a choice to Approve, Deny, or Add Comment only for each document. Click the document name to open the attached document for review.



You can add comments when you Approve and Deny, not just when you click Add Comment. Just fill in your comment and click Approve or Deny.

Viewing Documents

This screen is very similar to the search screen for requisitions. Enter search criteria to view any submitted documents.



Like requisitions, submitters can only view their OWN documents, while approvers can view any documents that are in workflows they can approve. District Administrators can view all documents for their district.