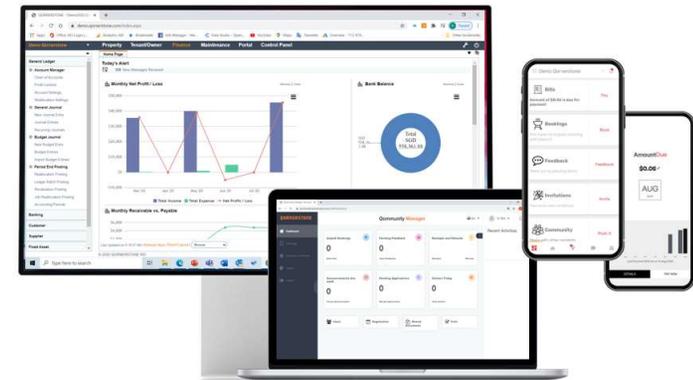




**QORNERSTONE**

Supported by:



Qornerstone Estate Platform

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## **Setting up Work Costing /Purchase Approval**

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Version 1.2



# Agenda

This guide is on Setting of Approval Setup for both Work Costing (WC) and Purchase Order (PO) in Qornerstone Estate's (QE) Maintenance & Finance Module respectively. The Guide will contain

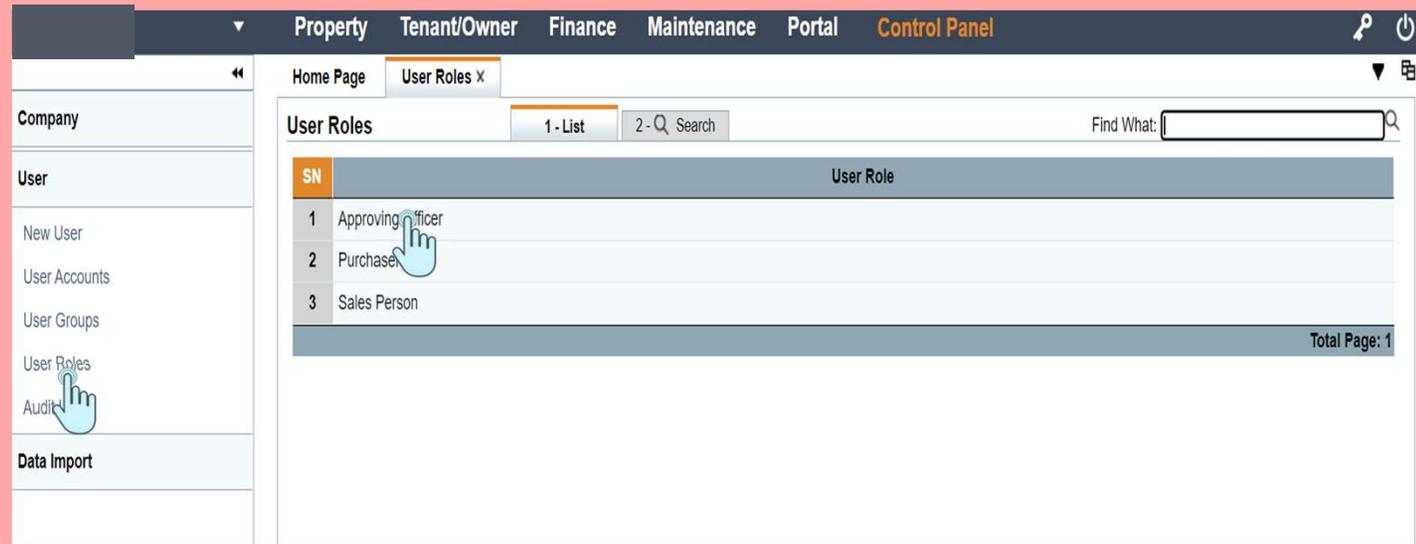
1. Setting up of Approver(s) .
2. Introduction to 2 Approval Setup options for both WC & PC.
3. Configuration of WC Approval without dollar limit .
4. Configuration of PC Approval with dollar limit .

# Workflow 1. Setting Up of Approver(s)

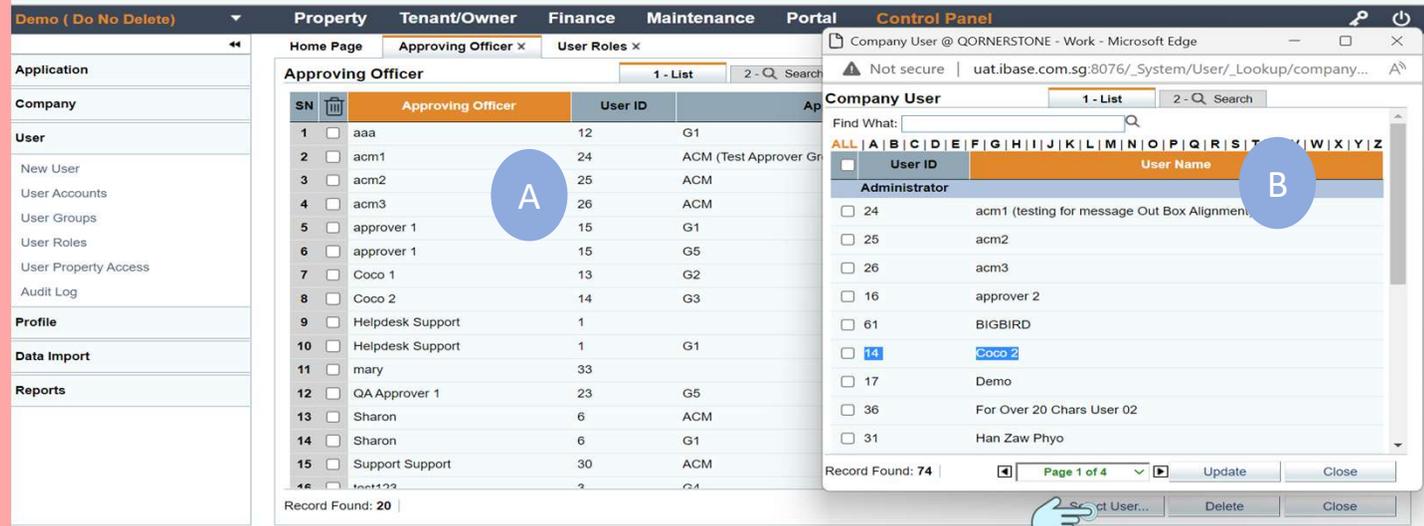
## Go to Control Panel Module -> User -> User Roles

- The User Roles are already configured in QE (QE) as per below

  - Approving Officer
  - Purchaser
  - Sales Person



- Select Approving Officer
- A list of Approving Officer will opened (A)
- To add new approver , click on the bottom right button "Select User"
- A Panel box (B) will show the list of current users set up in QE



# Workflow 1. (Cont'd) Setting Up Approver(s)

## Control Panel -> User -> User Roles

- Select the User either by
  - a) Select by alphabetical order or
  - b) Type the name in "Find What"
- Click on the selected the box will be checked.
- Clicked on the update button to add the user as an Approving Officer.
- A pop up box will appear to inform user that the Approving Officer has been submitted
- The selected user will appear in the List of Approving Officer

The screenshot shows the iBase Control Panel interface. The top navigation bar includes 'Home Page', 'Approving Officer x', and 'User Roles x'. The main content area is divided into two panels: 'Approving Officer' and 'Company User'.

**Approving Officer List:**

SN	Approving Officer	User ID	Group
1	aaa	12	G1
2	acm1	24	ACM (Test Ap
3	acm2	25	ACM
4	acm3	26	ACM
5	approver 1	15	G1
6	approver 1	15	G5
7	Coco 1	13	G2
8	Coco 2	14	G3
9	Helpdesk Support	1	
10	Helpdesk Support	1	G1
11	mary	33	
12	QA Approver 1	23	G5
13	Sharon	6	ACM
14	Sharon	6	G1
15	Support Support	30	ACM
16	test123	2	G1

**Company User List:**

User ID	User Name
61	BIGBIRD

A pop-up message box is displayed in the foreground, stating: "uat.ibase.com.sg:8076 says The following record has been submitted successfully! BIGBIRD :: QORNERSTONE ::". The message box includes an 'OK' button and a large letter 'A' in a blue circle. Below the message box, a progress bar is shown with the text "System is processing your request. Please do not navigate away."

# Workflow 1. (Cont'd) Setting Up Approver(S)

## Creating Same Users for Multiple Approver Roles

- The same Approving Officer can be created multiple times in the list (Refer to the Workflow 1). This is to allow the same Approving Officer to be assigned multiple approver roles as in groups for Finance & Maintenance and/or as an individual approver.
- To create Multiple Group for the Same Approving Officer, just click on the user (without approval group). A pop up box will be opened and user can input the necessary details.
- An example whereby an Approving Officer (shown in B) are set up as in various approver groups. In addition, the Approving Officer is set up as a single approver.
- Default setting "Y" mean that the approving officer user will be selected as the 1<sup>st</sup> approver within an approver group.

The screenshot displays a web application interface for managing 'Approving Officers'. The interface is divided into two main sections: a list view and an edit form.

**Approving Officer List View:**

- Search Criteria: Record contains 'Big'
- Table columns: SN, Approving Officer, User ID, Approver Group, Is Default Approving Officer.
- Table data:

SN	Approving Officer	User ID	Approver Group	Is Default Approving Officer
1	BIGBIRD	61		
2	BIGBIRD	61	Finance (Approving Amt < S\$1000)	Y
3	BIGBIRD	61	Team Manager	

**Approving Officer - Edit Value Form:**

- Approving Officer: BIGBIRD
- User ID: 71
- Approver Group: Finance
- Is Default Approving Officer: Y

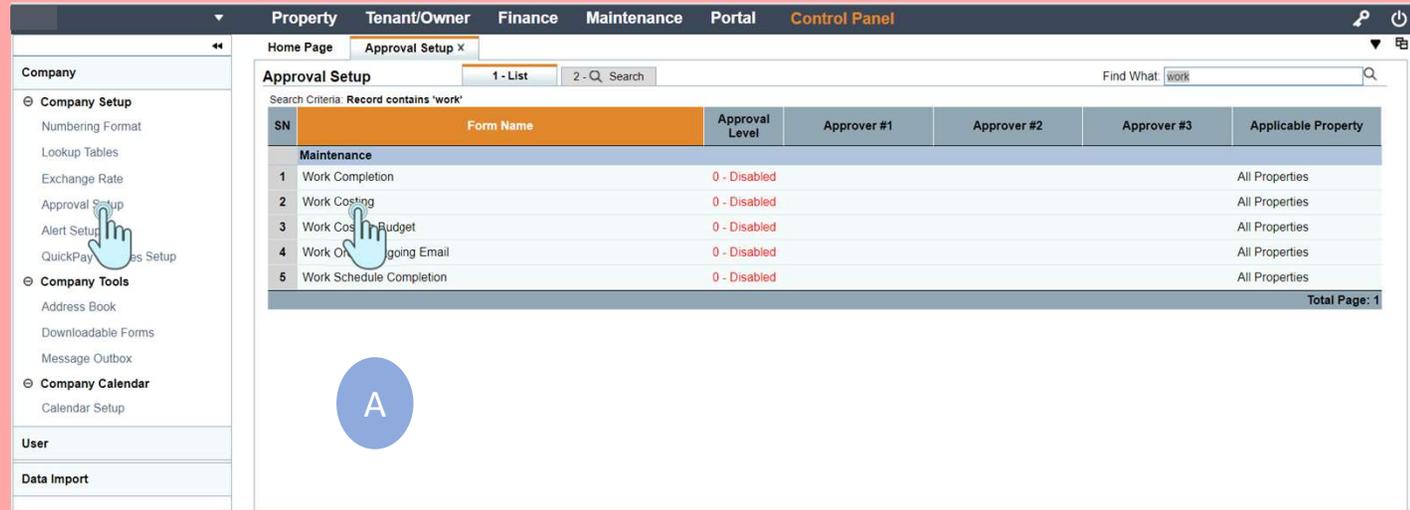
Annotations: A blue circle 'A' is placed over the 'Is Default Approving Officer' field in the edit form. A blue circle 'B' is placed over the first row of the list view.

# Workflow 2. Approval Setup

There are 2 options to set up a WC and PC approval setup.

## 1) Approval without Dollar Limit

- Go to Control Panel -> Company Set-Up -> Approval Set-up. (A)
- Search For WC and select. This apply to PO by searching for Finance Purchase Order

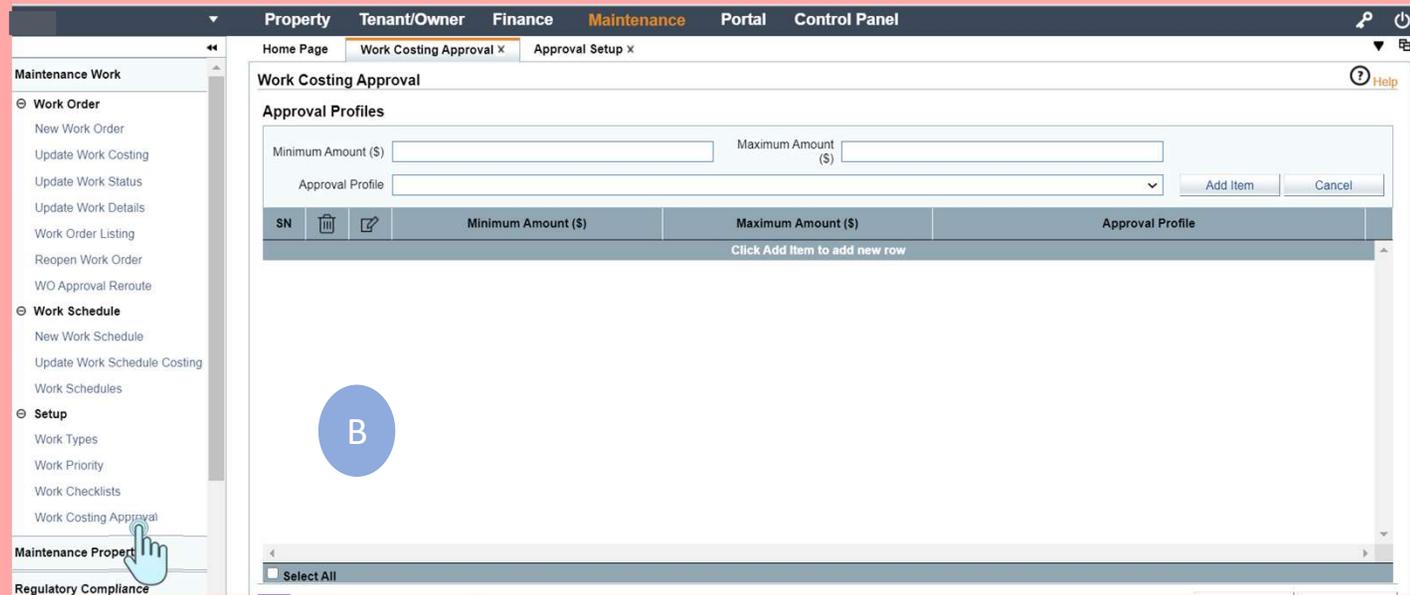


## 2) Approval with Dollar Limit

- Go to Maintenance Module -> Maintenance Work -> Setup -> WC Approval (B)
- Go to Finance -> Supplier -> Setup -> Purchasing Approval and select

### Note:

- Option 2 will override option 1 and take precedent if both approval profiles are set up for the same property .
- The same functionality will apply for purchase approval



# Workflow 3. Configuring the WC Approval

## Approval without Dollar Limit

- Go to Control Panel -> Company Set-Up -> Approval Set-up
- Search For WC and Select (**Note this is an existing setup shown**)
- **Below are the main points**
- a) **Set-up Approving Officer** - please refer to Work Flow 1.
- b) **New Approval Setup** - Creating a new WC approval from an existing setup.
- c) **Approval Level** - 1 means 1 Approver Officer or 1 approving group is needed. Max level is 3.
- d) **Applicable Property** - user can chose a single property or all properties for approval setup.
- e) **Approver #1 to #3**- Depending on the Approval Level's setup, user can choose an individual or a group .

The screenshot shows a web application interface for configuring an approval setup. The main form is titled 'Approval Setup' and includes the following fields and options:

- Form Name:** Work Costing
- Approval Level:** 1
- Applicable Property:** All Properties
- Enable Auto-Approval (\*applicable only if Requestor is Approving Officer)
- Allow Duplicate Approving Officers
- Approver #1:** Approving Officer: ACM, Approval is Optional:
- Approver #2:** Approving Officer: ACM, Approval is Optional:
- Approver #3:** Approving Officer: ACM, Approval is Optional:

At the bottom, there is a table titled 'Approval Setup for Work Costing' with the following data:

SN	Applicable Property	Approval Level	Approver #1	Approver #2	Approver #3
1	All Properties	1	ACM	ACM	ACM

Buttons for 'Save', 'Delete', and 'Close' are visible at the bottom right. A footer note indicates the setup was last updated by Support Support on 22 Aug 2022 22:21.

# Workflow 3. (Cont'd) Configuring the WC Approval

## Approval without Dollar Limit

f) **Approval Setup for WC I-** Summary of the existing setup

### Note

- Enable Auto-Approval (\*applicable only if Requestor is Approving Officer) : The requestor must select himself/herself as the approver before select the "submit" button. Refer to A
- Allow Duplicate Approving Officers: The same Approving Officer is set up more than 1 times at each approver level. Refer to A .
- Approval is Optional: Pending enhancement

**Approval Setup**

Setup Approving Officer: New Approval Setup

Form Name: Work Costing

Approval Level: 1

Applicable Property: All Properties

Enable Auto-Approval (\*applicable only if Requestor is Approving Officer)

Allow Duplicate Approving Officers

**Approver #1**

Approving Officer: ACM

Approval is Optional:

**Approver #2**

Approving Officer: ACM

Approval is Optional:

**Approver #3**

Approving Officer: ACM

Approval is Optional:

SN	Applicable Property	Approval Level	Approver #1	Approver #2	Approver #3
1	All Properties	1	ACM	ACM	ACM

Save Delete Close

**Approval Status**

Approval Status	Approving Officer(s)	Requestor	Submitted On	Approved On
Approved	garytest123, garytest123	garytest123	13 Sep 2022 1:53:20 PM	13 Sep 2022 1:53:20 PM

Update Status To

Pending Approval

Requestor: garytest123

Approver #1: garytest123

Approver #2: garytest123

Remarks: ok

Queried

Approved

Rejected

Remarks:

A

# Workflow 4. Configuring the Purchasing Approval

## Approval without Dollar Limit

- Go to Control Panel -> Company Set-Up -> Approval Setup
- Search For Finance PO (PO) (A)
- Click On PO and the screen for setup will shown (B)
- The setup is the same as WC. Please refer to workflow 3

## Note

- The Purchase Approval Sit in the Finance Module
- Screen B is a total new setup as such the New Approval Setup is missing. Once the user has setup PO approval for other MCST , The New Approval Setup will then be visible.

SN	Form Name	Approval Level	Approver #1	Approver #2	Approver #3	Applicable Property
<b>Finance</b>						
1	Customer Order	0 - Disabled				All Properties
2	Customer/Supplier	0 - Disabled				All Properties
3	Finance Purchase Order	0 - Disabled				All Properties
4	Finance Purchase Requisition	0 - Disabled				All Properties
5	Payment	0 - Disabled				All Properties
6	Quotation Pricing Adjustment	0 - Disabled				All Properties
7	Supplier Bank Account	0 - Disabled				All Properties
8	Supplier Invoice	0 - Disabled				All Properties
<b>Maintenance</b>						
9	Purchase Requisition	0 - Disabled				All Properties
10	Store Issue	0 - Disabled				All Properties
11	Store Issue Request	0 - Disabled				All Properties
12	Store Receive	0 - Disabled				All Properties
13	Supplier Contract	0 - Disabled				All Properties
14	Work Completion	0 - Disabled				All Properties
15	Work Costing	0 - Disabled				All Properties

Setup Approving Officer

Form Name: Finance Purchase Order

Approval Level: 0 (Approval Disabled)

Applicable Property: All Properties

Enable Auto-Approval (\*applicable only if Requestor is Approving Officer)

Allow Duplicate Approving Officers

**Approver #1**

Approving Officer: [Dropdown]

Approval is Optional:

**Approver #2**

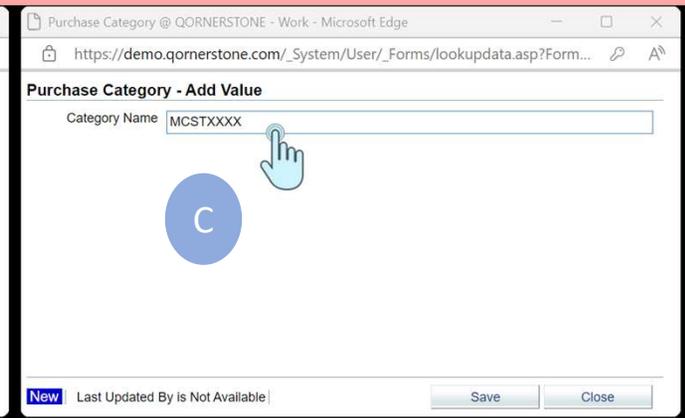
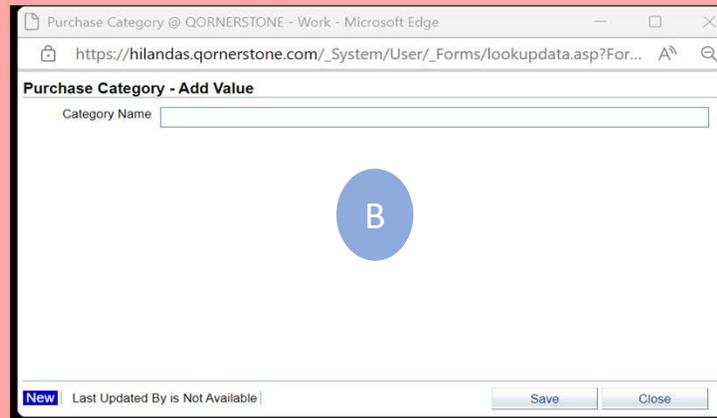
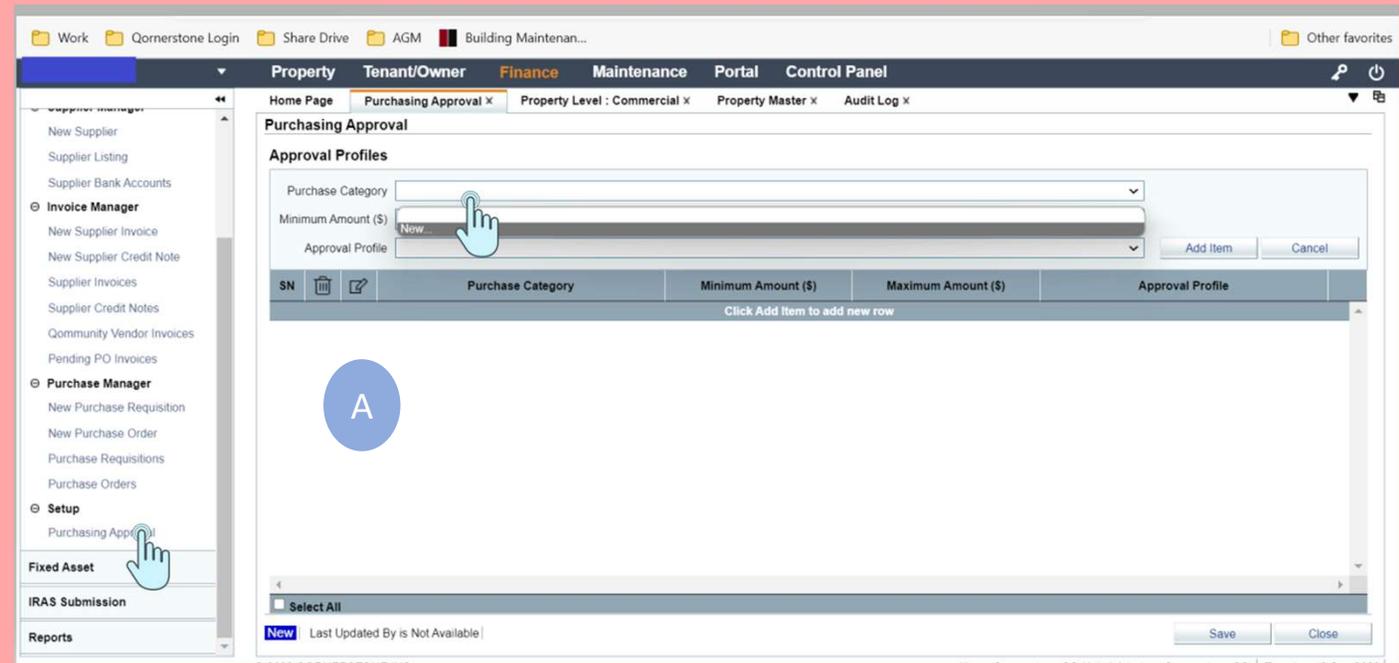
Approving Officer: [Dropdown]

Approval is Optional:

# Workflow 5. Configuring the Purchase Approval

## Setting up the Purchasing Approval with Dollar Limit

- Go to Finance -> Supplier -> Setup -> Purchasing Approval and select
- The Purchasing Approval screen (A) will be opened
- User can choose an existing Purchase Category to edit or Select New . ( Note : The screenshot A is a new setup without any PO approval setup)
- A pop up box will appear (B) to prompt user to add value/name
- User can input the name of MCST or description in the box (C) as Purchase Category and click save.



# Workflow 5 (Cont'd) Configuring the Purchase Approval

## Configuring the approved limits for specific MCST or all properties

- Once the user has saved the Purchase Category, the user can set the Minimum and Maximum Amount in accordance to their requirements. Click on Add Item (after completion) or Update Item (If there is any edit).
- It is recommended to set up to 3 tiers as the Approver has maximum 3 levels.
- For The Approval Profile, use the system select <New> Profile for PO> to generate the approval profile.
- Once done, click on Save

### ^ Note

**If user use the same Approval Profile, the Purchase Category will “co-mingle” with other estates that has the same profile.**

The screenshot shows the 'Purchasing Approval' configuration page in the QORNERSTONE system. The page is titled 'Purchasing Approval x' and is part of the 'Finance' section. The main content area is titled 'Approval Profiles' and contains a table with the following columns: SN, Purchase Category, Minimum Amount (\$), Maximum Amount (\$), and Approval Profile. The table is populated with 12 rows of data. The user is currently editing the row with SN 12, which has a Minimum Amount of 20,001.00 and a Maximum Amount of 50,000.00. The Approval Profile is set to '<New>Finance Purchase Order 14'. The user is also editing the Minimum and Maximum Amount fields. The screen includes a 'Show Menu' button on the left, a 'Save' button at the bottom right, and a 'Close' button at the bottom right. The footer shows '© 2022 QORNERSTONE INC' and 'User: garytest123 (Admin) Demo - garytest Tuesday, 13 Sep 2022'.

SN	Purchase Category	Minimum Amount (\$)	Maximum Amount (\$)	Approval Profile
5	TEST 1	0.00	20,000.00	Finance Purchase Order 7
6	Operations	0.00	25,000.00	Finance Purchase Order 7
7	Test 1	500.01	20,000.00	Finance Purchase Order 7
8	For Purchase Order ( maintenance)	0.01	1,000.00	Finance Purchase Order 8
9	Operations	25,000.01	60,000.00	Finance Purchase Order 8
10	MCSTXXXX	0.01	10,000.00	<New>Finance Purchase Order 15
11	MCSTXXXX	10,001.00	20,000.00	<New>Finance Purchase Order 13
12	MCSTXXXX	20,001.00	50,000.00	<New>Finance Purchase Order 14

# Workflow 5 (Cont'd) Configuring the Purchase Approval

## Setting the approvers and the applicable property

- Once the user has saved the Purchase Category , the user can set/define the level of approvers and the applicable property.
- By Click on it the different tiers, it will redirect user to the Approval Setup (A).

## Note

There are a total of 3 tiers

- 1) \$0.01 to S\$10000, 1 level of Approver
- 2) \$10,001 to \$20,000. 2 level of Approvers
- 3) \$20,001 to \$50,000. 3 level of approvers

The screenshot displays the 'Purchasing Approval' configuration page in the QORNERSTONE system. The main table lists various approval profiles with columns for SN, Purchase Category, Min Amount, Max Amount, Approval Profile, Level, and Approvers. A red box highlights the 'MCSTXXX' entries, which correspond to the 'Approval Setup' form shown in the foreground.

SN	Purchase Category	Min Amount	Max Amount	Approval Profile	Level	Approver #1	Approver #2	Approver #3
1	For Purchase Order ( maint...	1,000.01	5,000.00	Finance Purchase Order 11	2	(DEMO only, d...	Finance	CS
2	For Purchase Order ( maint...	5,000.01	10,000.00	Finance Purchase Order 12	3	(DEMO only, d...	Finance	Work Costing
3	For Purchase Order ( maint...	0.01	1,000.00	Finance Purchase Order 8	1	(DEMO only, d...		CSDemo
4	MCSTXXX	10,001.00	20,000.00	Finance Purchase Order 13	0			<Undefined>
5	MCSTXXX	20,001.00	50,000.00	Finance Purchase Order 14	0			<Undefined>
6	MCSTXXX	0.01	10,000.00	Finance Purchase Order 15	0			<Undefined>

The 'Approval Setup' form for 'Finance Purchase Order 15' is shown below the table. It includes the following fields:

- Form Name: Finance Purchase Order 15
- Approval Level: 1
- Applicable Property: Community Gardens (MCST6789)
- Enable Auto-Approval:
- Allow Duplicate Approving Officers:
- Approver #1: Approving Officer (DEMO only, do not touch)
- Approval is Optional:
- Approver #2: Approving Officer (marked with a blue circle 'A')
- Approval is Optional:
- Approver #3: Approving Officer

# Workflow 5 (Cont'd) Configuring the Purchase Approval

## Enable the Approval Setup

- In the Purchase Approval, user can edit the different limit. it will also redirect user to the Approval Set-up when selected
- To enable the approval limit to be implemented, user can select the approval level as shown in (A) and (B) in accordance to the tiers
- Once done, Click on the save. The approval limit will be activated.

## Note

**The approval setup is the same as Workflow 3 . The main difference is the this approving tier has a dollar value attached to the approvers.**

**Once the setup is done , the purchasing approval will override the approval setup in the control panel.**

The screenshot displays the QORNERSTONE web application interface. The top part shows a table of 'Purchasing Approval' records. A red box highlights rows 4, 5, and 6, which are for 'MCSTXXX' with approval levels 0, 0, and 0 respectively. A hand cursor is pointing at the '<Undefined>' dropdown in the 'Approver #3' column for row 5. Below the table, two 'Approval Setup' configuration screens are shown side-by-side. The left screen is for 'Finance Purchase Order 15' with 'Approval Level' set to 1, and a blue circle labeled 'A' is placed over the 'Approving Officer' field. The right screen is for 'Finance Purchase Order 14' with 'Approval Level' set to 2, and a blue circle labeled 'B' is placed over the 'Approving Officer' field.

SN	Purchase Category	Min Amount	Max Amount	Approval Profile	Level	Approver #1	Approver #2	Approver #3	Ap
For Purchase Order ( maintenance)									
1	For Purchase Order ( maint...	1,000.01	5,000.00	Finance Purchase Order 11	2	(DEMO only, d...	Finance	CS	
2	For Purchase Order ( maint...	5,000.01	10,000.00	Finance Purchase Order 12	3	(DEMO only, d...	Finance	Work Costing	CS
3	For Purchase Order ( maint...	0.01	1,000.00	Finance Purchase Order 8	1	(DEMO only, d...		CSDemo	
MCSTXXX									
4	MCSTXXX	10,001.00	20,000.00	Finance Purchase Order 13	0			<Undefined>	
5	MCSTXXX	20,001.00	50,000.00	Finance Purchase Order 14	0			<Undefined>	
6	MCSTXXX	0.01	10,000.00	Finance Purchase Order 15	0			<Undefined>	
Operations									
7	Operations	0.00	25,000.00	Finance Purchase Order 7	0			All Properties	
8	Operations	25,000.01	60,000.00	Finance Purchase Order 8	1	(DEMO only, d...		CSDemo	

# Workflow 5 (Cont'd) Configuring the Purchase Approval

## Final Purchasing Approval

- The Final Purchase Approval setup will be shown. Once this is enabled, any submission of PO in both Maintenance and Finance will be directed for approval according to the dollar value set.
- Please refer to guide Raising a PO when for submission of approval .

The screenshot displays the 'Purchasing Approval' configuration page in the QORNERSTONE application. The table below shows the current settings for various approval profiles. A red box highlights the 'MCSTXXXX' category, and a hand cursor points to the row with SN 6.

SN	Purchase Category	Min Amount	Max Amount	Approval Profile	Level	Approver #1	Approver #2	Approver #3	Applicable Property
<b>For Purchase Order ( maintenance)</b>									
1	For Purchase Order ( maint...	1,000.01	5,000.00	Finance Purchase Order 11	2	(DEMO only, d...	Finance		CSDEMO
2	For Purchase Order ( maint...	5,000.01	10,000.00	Finance Purchase Order 12	3	(DEMO only, d...	Finance	Work Costing	CSDEMO
3	For Purchase Order ( maint...	0.01	1,000.00	Finance Purchase Order 8	1	(DEMO only, d...			CSDEMO
<b>MCSTXXXX</b>									
4	MCSTXXXX	10,001.00	20,000.00	Finance Purchase Order 13	2	(DEMO only, d...	Finance		MCST6789
5	MCSTXXXX	20,001.00	50,000.00	Finance Purchase Order 14	3	(DEMO only, d...	Finance	COUNCIL ME...	MCST6789
6	MCSTXXXX	0.01	10,000.00	Finance Purchase Order 15	1	(DEMO only, d...			MCST6789
<b>Operations</b>									
7	Operations	0.00	25,000.00	Finance Purchase Order 7	0				All Properties
8	Operations	25,000.01	60,000.00	Finance Purchase Order 8	1	(DEMO only, d...			CSDEMO
<b>POTEST 1</b>									
9	POTEST 1	20,001.00	50,000.00	Finance Purchase Order 2	0	garytest123	Finance		CSDEMO
10	POTEST 1	20,001.00	50,000.00	Finance Purchase Order 2	2	garytest123	Finance		MCST6789
11	POTEST 1	0.00	20,000.00	Finance Purchase Order 6	1	(DEMO only, d...			CSDEMO
12	POTEST 1	0.00	20,000.00	Finance Purchase Order 6	1	garytest123			LEASE1
13	POTEST 1	0.00	20,000.00	Finance Purchase Order 6	1	garytest123			MCST6789

View | Last Updated by garytest on 13 Sep 2022 17:25 | Edit | Other Actions... | Close

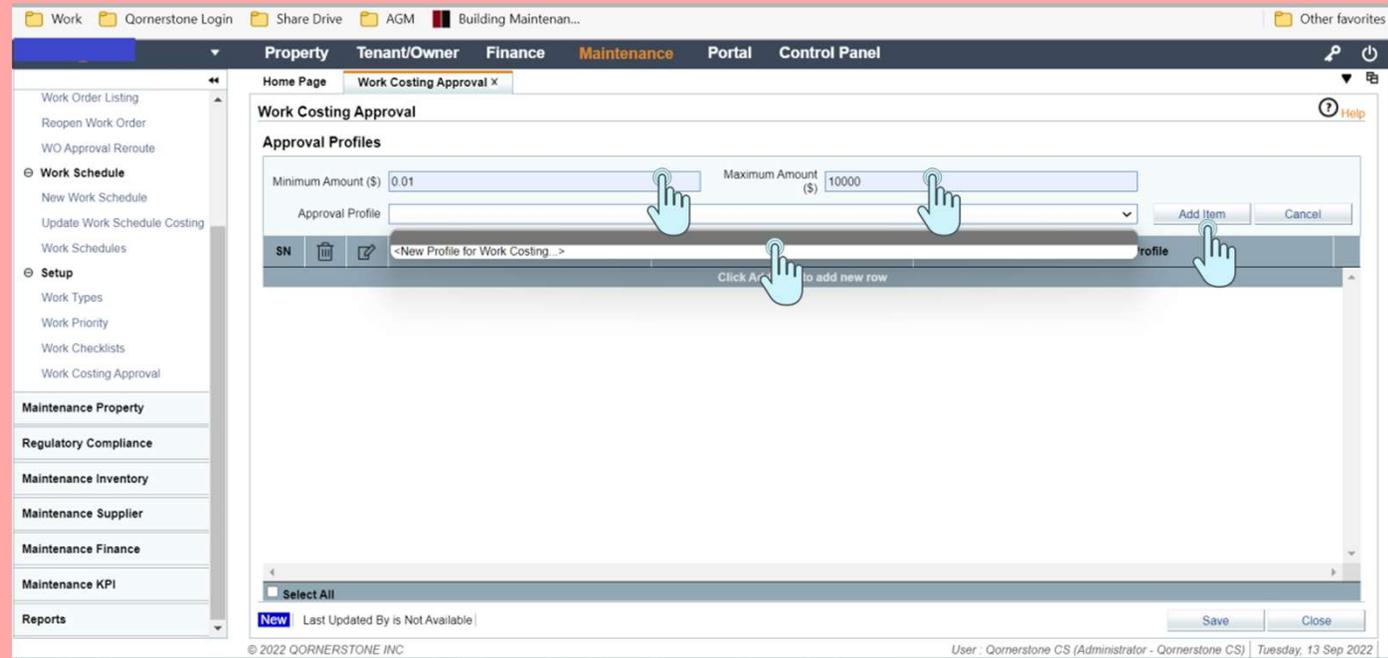
© 2022 QORNERSTONE INC | User: garytest123 (Administrator - Demo - garytest) | Tuesday, 13 Sep 2022

# Workflow 6

## Configuring the WC Approval

### Approval with Dollar Limit

- Go to Maintenance Module -> Maintenance Work -> Setup -> WC Approval
- The Process is similar to the Configuration for PO except that there is no Purchase Category..
- User can set the Minimum amount and Maximum Amount in accordance to their requirements and click on "Add items"



# Workflow 6 (Cont'd)

## Configuring the WC Approval

### Setting up the Approval limits

- Go to Maintenance Module -> Maintenance Work -> Setup -> WC Approval
- The Process is similar to the Configuration for PO except that there is no Purchase Category. The Workflow process is same as Workflow 5.
- User can set the Minimum amount and Maximum Amount in accordance to their requirements and click on "Add items"
- Click on individual tier and configure the Approval Setup.

SN	Min Amount	Max Amount	Approval Profile	Level	Approver #1	Approver #2	Approver #3	Applicable Property
1								
2								
3								
4								
5								
6								
7	501.00	1,000.00	Work Costing7	1	(DEMO only, do no...			CSDEMO
8	1,001.00	2,000.00	Work Costing8	2	(DEMO only, do no...	Finance		CSDEMO
9	2,001.00	5,000.00	Work Costing9	3	(DEMO only, do no...	Finance	COUNCIL MEMBER	CSDEMO

Record Found: 9