

Remote Submission (RSA) Approver's Guide

This guide will show you the different functions you can perform under your Approval Role in the RSA system.

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Logging Into RSA

To log-in, go to <https://printshop.roundrockisd.org/>

After logging in, always be sure to select Approvals in the drop down on the top left side of the screen.

The screenshot shows the Round Rock ISD Print Services web application. At the top, there is a navigation bar with the following items: Roles (circled in red), Approval, Proxy, ImpactVDP Designer, Home, My Account, Help, and Logout. Below the navigation bar is the Round Rock ISD Print Services logo. A secondary navigation bar contains: Approvals, Approval Groups, Run Report, Report History, APPROVALS [2], and REJECTIONS [1]. A yellow warning banner states: "Due to COVID-19 concerns, turnaround times and delivery may be delayed." The main heading is "Order Approval" with the instruction: "Select orders for approval and click Approve, or click Details to view, reject or modify the order." Below this is a search form with fields for "Order Search", "Ship Dates from" and "to", "Cost greater than" and "Cost less than", "Rows Per Page" (set to 100), and "Search" and "Clear" buttons. A table lists two orders:

<input type="checkbox"/>	Order ID ▼	Approval group ▼▲	Type ▼▲	Order Placer ▼▲	Ordered ▼▲	Ship Date ▼▲	Hours Since Ordered	Cost ▼▲	Details
<input type="checkbox"/>	548221	Print Shop	Cost	Amy Conlon	08/10/2020	08/17/2020	0	\$26.82	Details
<input type="checkbox"/>	548222	Print Shop	Cost	Amy Conlon	08/10/2020	08/17/2020	0	\$28.31	Details

Below the table, it says "[1-2] of [2]" and there is an "Approve" button. At the bottom of the page, there is a copyright notice: "© 2001-2020 Rochester Software Associates, Inc. All rights reserved."

***If you, as an Approver, are placing an order, it will NOT need to be approved by the alternate approver on your campus, unless you request us to set it up that way. To request this change, please email print_services@roundrockisd.org.

Approvals Tab

The approval role will always open to your current open approvals.

Viewing and Approving Orders

You can check the box beside any orders that are ready to approve, and then check “Approve” below. Or, if all orders are ready, you can check the box in the header, and all order boxes will be checked. (example below)

Due to COVID-19 concerns, turnaround times and delivery may be delayed.

Order Approval

Select orders for approval and click Approve, or click Details to view, reject or modify the order.

Order Search Ship Dates from to Cost greater than Cost less than Rows Per Page 100 Search Clear

<input checked="" type="checkbox"/>	Order ID ▼	Approval group ▼▲	Type ▼▲	Order Placer ▼▲	Ordered ▼▲	Ship Date ▼▲	Hours Since Ordered	Cost ▼▲	Details
<input checked="" type="checkbox"/>	548221	Print Shop	Cost	Amy Conlon	08/10/2020	08/17/2020	0	\$26.82	Details
<input checked="" type="checkbox"/>	548222	Print Shop	Cost	Amy Conlon	08/10/2020	08/17/2020	0	\$28.31	Details

[1-2] of [2]

Approve

If you need to check the details of an order or make modifications, check the “Details” box beside the order. From the details page you can see the general information of what was ordered- the Order Name, Estimate, Customer Name/ Info.

Note: Clicking Modify to adjust order details will also recalculate the order cost based on new pricing or time-based adjustments.

Order name Birthday Participation Approval group Print Shop Order Estimate \$26.82
For Amy Conlon (e138778) Amy_Conlon@roundrockisd.org Work # 512-464-6985

Item 1

125 Birthday Participation Waiver.pdf
2 Pages Unit Price \$0.01
Quantity 1800

Print Options Print B/W, 2-Sided, 20# White Paper (for B/W Printing), Scale Down Only Binding Collation / Uncollated

Preview Document

Click on Unit Price to see a basic explanation of the cost. **Please note that these are estimates- if the order must be updated in production to make it print correctly, the price might change slightly.**

In the below sample you can see that this order of 1800 copies will cost \$26.82.

- Black/White Impressions will be \$17.28 of the order
 - If a teacher submits a color job that is too costly, you can see how much the color affects the order's price here.
- The paper will be \$9.54.

Modify Order for Approval

Item	Category	Option	Quantity	Unit Price	Option Total	Item Total
125 Birthday Participation Waiver.pdf Print: Original Pages: 2, B/W, 2-Sided, 60# Bright Blue Paper, Scale Down Only Binding: Collation / Uncollated Quantity: 1800 \$0.01 each	Printer : Plex	B/W : 2-Sided	3600 impr.	\$0.004800	\$17.28	
	Paperstock	20# White Paper (for B/W Printing)	setup	\$0.000000		
			1800 sheets	\$0.005300	\$9.54	\$26.82

[Close](#)

[Print Options](#) Binding Collation / Uncollated

When you scroll to the bottom of this page, you will see a few options:

Order Approval / Rejection

Approval or Rejection Comment [Save Comment Only](#)

Rejection Reason Approve To ****Production**** [Approve](#)

APPROVAL HISTORY					
Approval group	User ID	Date	Action	Reason	Comment
Print Shop	e138302	08/10/2020 3:02 PM	Comment		Waivers approved by NK

[Return](#) [Modify](#)

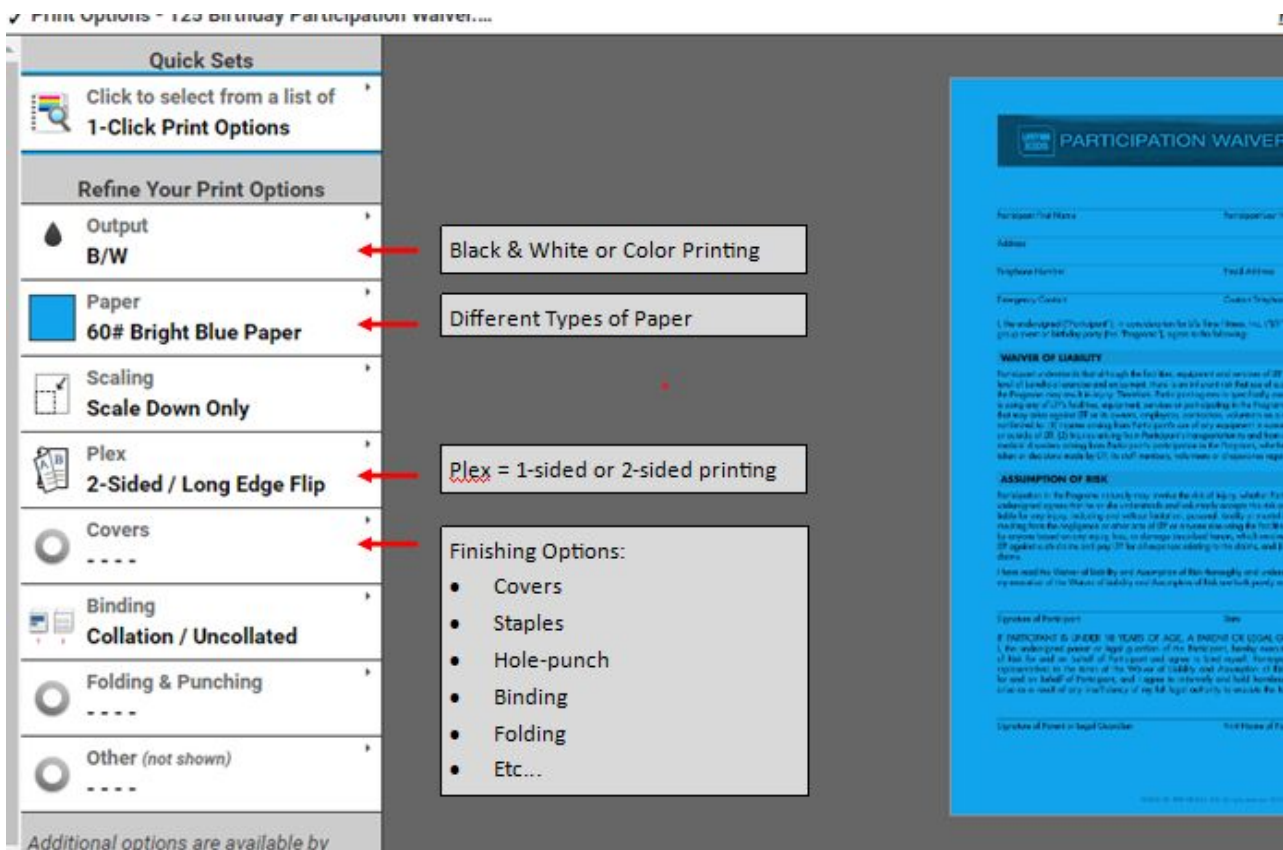
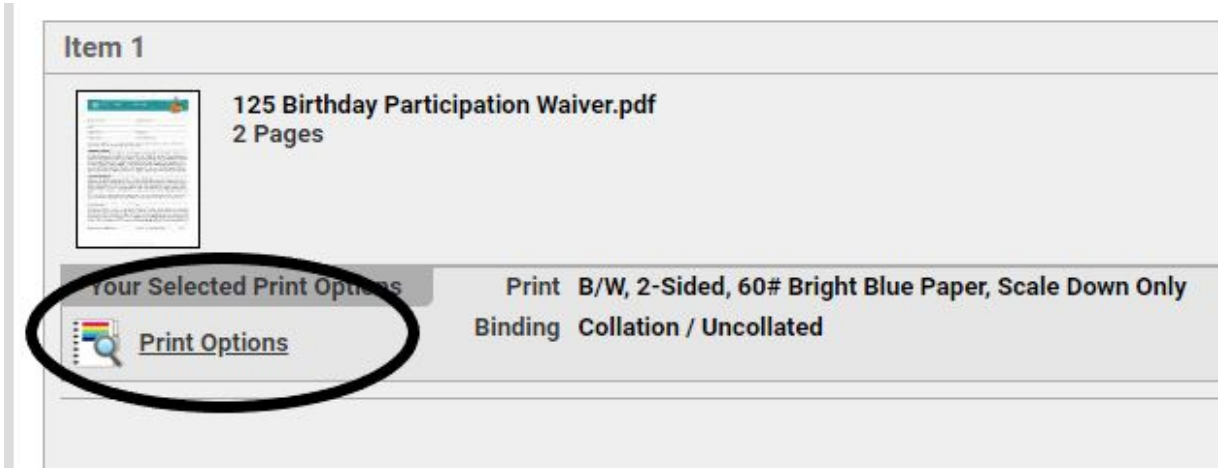
You can add a Comment - in the above example I added "Waivers approved by NK". This will show on the order as it moves through the system, and will show on approval reports you can run (noted below). From here you can either click Reject or Approve to do either to the order.

Making Changes to an Order

If you want to make changes to the order, you can click Modify to be taken to a new page where you can make changes to the order. This will take you to a page that looks just like cart ordering.

It is NOT required that you make modifications to orders. If something is put in incorrectly, or outside of your budget allowance, you are free to reject any orders and put it on your teachers to correct their orders. However, if a teacher made an error, you're able to correct it on your end, if you so choose.

To Change Print Options:



You can also change: the Quantity Ordered, the Due Date, and/or the Budget Code.

Shipping Information

I would like my order shipped by: **Monday, August 17, 2020** *Note: Only dates when the Print Shop is open may be selected.*

Amy Conlon
Print Services
Office Specialist
Brushy Creek Complex
Round Rock, Texas
United States
Amy_Conlon@roundrockisd.org

Distribution Delivery System

Delivery Estimate
Monday, August 17, 2020

Ordered Items		Quantity
1	125 Birthday Participation Waiver.pdf	1800

[Enter shipping instructions for this recipient](#)

Billing Information

Amy Conlon
Print Services
Office Specialist
Brushy Creek Complex
Round Rock, Texas
United States
Amy_Conlon@roundrockisd.org

Select Billing Codes for Payment

Budget Code

[Click here to enter CURRENT DCA billing instructions](#)

Bill to Teaching and Learning for current DCAs and DCA answer documents ONLY.

Order Estimate **\$26.82**
Click the price to view the cost details

Order Rejection

Approval group	User ID	Date	Action	Reason	Comment
Print Shop	e138302	08/10/2020 3:02 PM	Comment		Waivers approved by NK

Due Date: This won't allow you to change the date to anything sooner than the system is set to allow. Currently orders are automatically populated for 5 days out.

Quantity: Update quantity if customer ordered too many- in above example, if 180 waivers were needed, you can update the quantity without rejecting the order.

Budget Code: Update budget code if incorrect/ incomplete code was used. If a teacher's code needs to be updated in their account so it populates correctly, please email print_services@roundrockisd.org and we can make this change permanent.

Make sure to save your changes! You will also need to go back and approve the order after modifying it as well.

Rejecting Orders

To reject an order, you will need to click on Details next to the order. At the bottom of this screen, you can add Comments (which we strongly recommend when rejecting an order), and click “Reject.”

Order Approval / Rejection

Approval or Rejection Comment [Save Comment Only](#)

Rejection Reason Approve To ****Production**** [Approve](#)

APPROVAL HISTORY

Approval group	User ID	Date	Action	Reason	Comment
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[Return](#) [Modify](#)

When Orders are approved they will move into our production queue. If orders are rejected, the employee will receive an email indicating that the order has been rejected with any comments provided.

From the employee’s cart page they will see a header that says REJECTIONS. Or, if they review their Orders, the Rejected Order will show there. From here they can click the Modify button to begin the process of reordering.

Orders Manage Files APPROVALS [2] REJECTIONS [1] CART [1]

Rejected Orders

These are orders that were rejected by an approver or the print center.
Modify the order to make adjustments as necessary and then place the order again. [Reports](#)

Order Name	Order # ▲	Created	Sending to	Status	
Sketchbooks	548219	08/10/2020	Natsu Knox	🛒 Rejected	Modify

[1-1] of [1]

Reordering a rejected order will look identical to placing a regular order, but at the bottom of their cart there will be notes about why the order was initially rejected, so they know what they need to change to allow the order to go through the second time. Below my order was rejected because my quantity was too high.

[Click here to enter CURRENT DCA billing instructions](#)

Bill to Teaching and Learning for current DCAs and DCA answer documents ONLY.

Order Rejection

Approval group	User ID	Date	Action	Reason	Comment
Print Shop	e138778	08/10/2020 4:02 PM	Rejection		Too many copies

When the employee reorders a previously rejected job, the previous note for rejection will also show up on your approval details screen (example below). From here you can confirm that the customer did correct the issue that caused the order to be rejected in the first place.

Order Approval / Rejection

Approval or Rejection Comment [Save Comment Only](#)

Rejection Reason Approve To ****Production**** [Approve](#)

APPROVAL HISTORY					
Approval group	User ID	Date	Action	Reason	Comment
Print Shop	e138778	08/10/2020 4:02 PM	Rejection		Too many copies

[Return](#)


[Modify](#)

Approval Groups Tab

From here you can see the approval groups that are assigned to you, and make modifications to those groups.

Manage Approval Groups

Modify the minimum order cost requiring approval, and the maximum order cost allowed for submission.
Assign membership to the approval group from the Members page.

						Search	Clear
Group name <input type="text"/>				Rows Per Page <input type="text" value="100"/>			
Group Name	Type	Minimum Requiring Approval	Maximum Order Cost for Submission	Next Approval Group	Position		
Print Shop 	Cost	\$ 10.00	\$ 0.00	**Production**	0	Members	Account Codes

[1-1] of [1]

[Save](#)

The above example shows the Print Shop Approval Group for our Department.

- Type - Every approval group is set to approve jobs based on the order Cost.
- Minimum Requiring Approval - Our is set to \$10.00, but yours may be different based on your campus's request. Any order below this amount will bypass the approval process. You will only see orders above this amount.
- Maximum Order Cost for Submission is \$0 (we currently have not set this amount for any approval groups).
- "Next Approval Group" shows that the orders will go into our Production queue once approved.
- Members - You can click this to review your list.
- Account Codes button is not set up to perform any functions at this time.

Managing Members in your Approval Group

Click the Members Button.

To search your Members List, uncheck Other and click Search.

“Other” will show you every person who is available in our system, and shows a lot of information that could be very confusing.

		<input type="button" value="Search"/>	<input type="button" value="Clear"/>
Name <input type="text"/>	<input checked="" type="checkbox"/> Members	<input checked="" type="checkbox"/> Approvers	
User ID <input type="text"/>	<input type="checkbox"/> Other		

Name	User ID	Current	Approval Group	Member	Approver	Email
Thomas Diaz III	e		Print Shop	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Wes Johannessen	e		Print Shop	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Randy Eakins	e		Print Shop	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Reviewing the list of Members and Approvers will allow you to see who is in your campus’s approval group (Members) and who is authorized to approve orders (Approvers). Email indicates who receives emails for approving orders.

If you need to make changes to your list, please submit your changes on the [RSA Campus Additions/Removals form](#).

Run Report Tab

From here you can run usage reports for everyone in your approval group.

Approval Actions Report

Specify the criteria to build an approval actions report.

Selections / Filters

Approval Dates from 08/01/2020

to 08/10/2020

Include Only my approval actions

All approval actions within my approval groups

Run Report

Select the dates you want to run the report for, and click “All approval actions within my approval groups” then run the report. It will take you to another page where the report will be generated- you can download it from there.

The report will show all orders placed for every member within your group, regardless of whether it needed approval or not.

The report has a lot of information on it, which may or may not be helpful to you, depending on how you process orders.

- Approval Action- This shows whether the job was approved, rejected, or included a comment
- Comment- Any comments added during approval or rejection. **If an order was below the cost approval amount**, there will be a comment that says “Approved by System: The order cost is lower than the minimum cost required for approval.”
- Approved to- ****Production**** if the order was approved, it will always move into production. If this field is blank, the order was rejected.
- Please note, if the cost was changed during production due to updates to the order, the change in cost will not be reflected on the report.
- Order ID/ Order Name- we are now requiring order names for all orders placed.
- Order Status- There are several different options you might see here:
 - Unsubmitted: Order is still waiting for approval
 - Canceled- the Order went through approval but was cancelled on the Print Shop end during production
 - Completed- Order went through production and has been finished
 - Date completed- this is the date that we updated our system to reflect that the order was shipped/ completed.

Report History Tab

From here you can see past reports you've run, and redownload them if needed.