



# BusinessPLUS

(Version 7.9.10)

## Approver Training Guide

06.05.2019



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# Approver - Training Guide

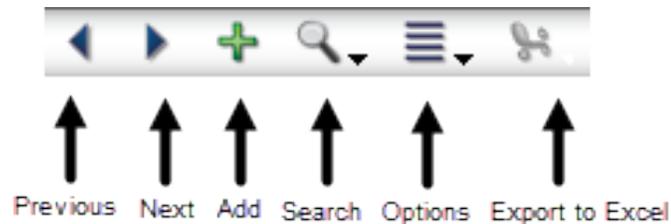
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## Dashboard Navigation

### Navigation Bar Icons



### Keyboard Commands

<b>CTRL + A</b>	Add a record.
<b>CTRL + D</b>	Delete a record.
<b>CTRL + C</b>	Copy a record.
<b>CTRL + V</b>	Paste a record.
<b>CTRL + F</b>	Find/ Search and then Apply Search.
<b>CTRL + G</b>	Toggle to and from the grid view and single record view.
<b>CTRL + L</b>	View the list box attached to a field with an arrow.
<b>CTRL + T</b>	Display the last used auto-generated seed value for a field.
<b>CTRL + N</b>	Move to the next record.
<b>CTRL + P</b>	Move to the previous record.
<b>CTRL + ;</b>	Inserts the current date in a date field.
<b>CTRL + 1, 2, 3, etc.</b>	Move to another tabbed page on a screen. <i>(Example: if there are four tabbed pages, press <b>CTRL +3</b> to move to the third page from the left.)</i>
<b>F1</b>	Display the help file associated with the screen you are viewing.
<b>F5</b>	Refreshes the screen.
<b>ESC</b>	Cancel all changes to the record you are working on (since last "ENTER")
<b>TAB</b>	Move through the fields on a screen.
<b>Shift + TAB</b>	Move backwards through the fields on the screen.

### Selection Criteria

- Recommend using all upper case when entering alphabetic information-some fields are case-sensitive
- Use ':' to specify a range
- Both the '%' and the '\*' can be used as wildcards
- Use '>' for greater than
- Use '<' for less than
- Use '>=' for greater than or equal to
- Use '<=' for less than or equal to
- Use '<>' for not equal to
- Use ',' or '|' to specify an OR condition (A,B would be A or B)
- Use '=xxx,xxx' to select text with commas

## Purchase Order Life Cycle



## Purchase Order Types

There are two types of Purchase Orders that can be created through the POUPPR screen, an itemized standard PO and a Blanket PO.

1. **Standard PO** – An Itemized PO is the standard PO type. It lists an itemized description of goods, price & quantity of each item. These PO's are quantity driven and require receiving as BusinessPlus uses three way matching (PO item, received item and AP invoice item). Invoices do not route for approvals.
2. **Blanket PO** - Blanket PO's are used when the order is *not itemized* and is based on *dollar amounts*. The most common type of Blanket is used to encumber money for services or supplies to be procured from the vendor throughout the school year (e.g. supplies needed by Maintenance Dept.). These PO's are dollar driven and multiple payments can be made throughout the year. Instead of three way matching, invoices for blanket PO's are routed for approval (usually same routing as the initial PO).

### **NOTE:**

**PR Request Date:** Used to determine which budget year to check for available funds.

**PO Print Date:** Will update the encumbrance database by dis-encumbering the pre-encumbrance and creating the encumbrance in the budget year indicated by this date.

## Workflow Approvals

**Definition of Workflow:** An automated approval process that is initiated by the creator and sent through to the appropriate approvers based on Purchase Request criteria and system workflow structure.

There are three methods that may be used to approve or reject a Purchase Request (PR). Approvals may be applied (see below for instructions for each method):

- From an email response
- In BusinessPlus directly from the Purchase Request Entry screen - POUPPR
- In BusinessPlus from the Workflow Task list on the Home page

Regardless of where approvals are being applied, it is always important to closely review what is being purchased, from which vendor, how much is being spent and to which account are the goods being charged.

### 1. Approval from: Email Approvals

Emails will be sent to approvers and they can simply reply with:

To Approve: **Y, YES or OK**

To Reject: **N or NO**

Extra line breaks in this message were removed.

From: Birmingham.Test.Workflow@oakland.k12.mi.us  
To: Brunette, Katrina  
Cc:  
Subject: WORKFLOW/Action BASE PR APRV created by CATCHPOLEJ

To approve this, simply reply and type Y, YES, or OK in the first line.  
To reject this, reply and type N or NO in the first line.  
To add comments, type up to 255 characters on subsequent lines delimited by double square brackets.  
Example: [[this is an official comment to the e-mail response]] All other comments will be ignored.

WORKFLOW MODEL INFORMATION:  
-----  
User=BRUNETTEK  
Model=BASE PR APRV  
Activity=A22  
Key=E22BDF48-A076-4340-8697-2FC7BF995425  
Version=1  
UniqueKey=A631DCA7-F894-4A54-BF45-3497AB6C811D

WORKFLOW INSTANCE INFORMATION:  
-----  
Purchase Request = R1700545 **1**  
Ship To = 150  
End Use =  
PR Total\$ = \$1,890.00 **2**  
Req Codes = -----  
Requested By = Janette Catchpole **3**  
Request Date = 2/8/2017  
Entry Date = 2/8/2017  
PO Type = P  
Vendor = 069450 - SCHOOL SPECIALTY **4**

Item#	Quantity	Price	Tax	Shipping	Item	Total FA
0001	10.000	189.00	.00	.00	1890.00 N	

Account	Key Desc.	Object Desc.	Split Amt/Pct
110-111-0000-0000-120-1200-55910000	KELLER 12	OFFCE SUPPLIES	100%

Description **7**  
-----  
10 SPEED BLUE BIKE

WORKFLOW HISTORY INFORMATION:

**Field Descriptions:**

- 1 Purchase Request Number**
- 2 Order Total**
- 3 Who entered the order**
- 4 Vendor**
- 5 Quantity, Unit Price, Extended Line Total**
- 6 Account number**
- 7 Item Description**

## Workflow Approval Options

When approving Purchase Requests in BusinessPlus, there are four options to select from when reviewing records (purchase requests, etc.) in BusinessPlus:

- ✓ The green check mark will **approve** the Purchase Request
- ✗ The red X will **reject** the Purchase Request
- ⏸ The white hand will place the record on hold indefinitely
- ➡ The blue arrow will **forward** the Purchase Request to another user for them to approve.

**NOTE:** The **blue forward** arrow can be used in two ways:

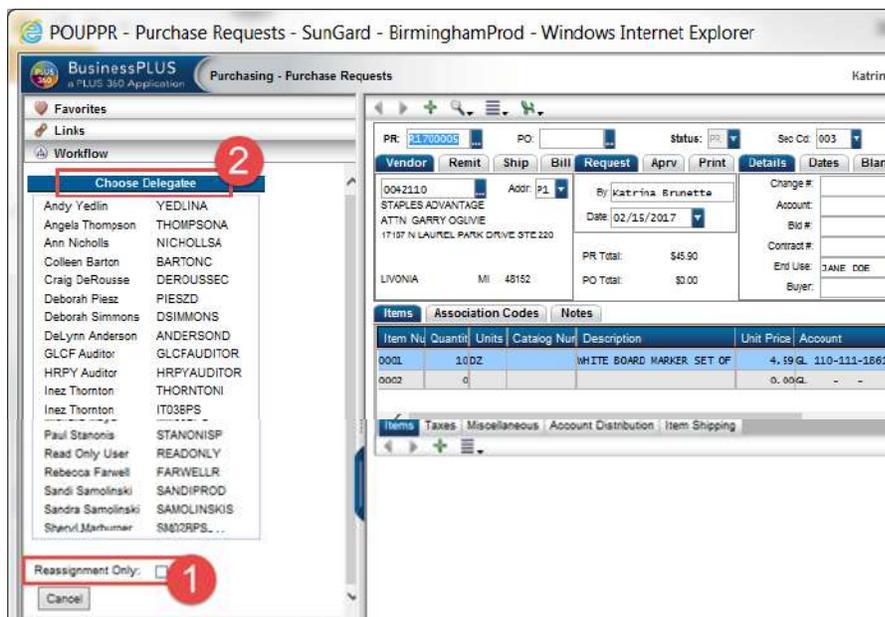
- To REASSIGN (or replace) the approval to another person, or
- To obtain an ADDITIONAL approval; will route back to person that delegated for approval

### To REASSIGN the PR to another approver:

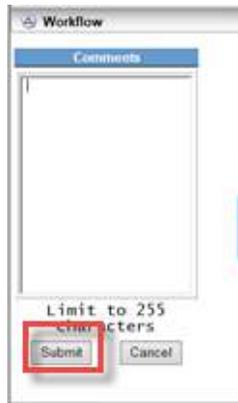
1. Click the **Reassignment Only Box** (see #1 in screen shot below)
2. Select the **Delegatee** (#2 in screen shot below)
3. Enter any **Comments** for the approver (in the Text Box)

### To obtain an ADDITIONAL approval:

1. Select the approver from the **Delegatee** list (#2 in screen shot below)
2. Enter any **Comments** for the approver (in the Text Box)



**After selecting one of these options it is necessary to click the Submit button.** There is a text box available to include any comments.



**NOTE:** It is recommended to use the **Comments** box if a PR has been *rejected* to let the Creator know why and to provide further instructions, if any.

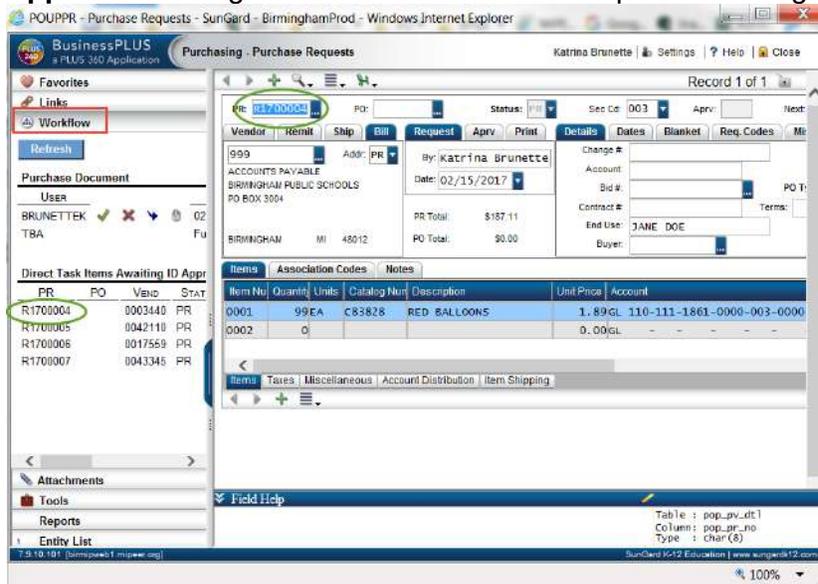
## 2. Approvals from: Enter Purchase Requests – POUPPR screen

Approve by accessing **POUPPR** from the link on the Schools/Departments tab.



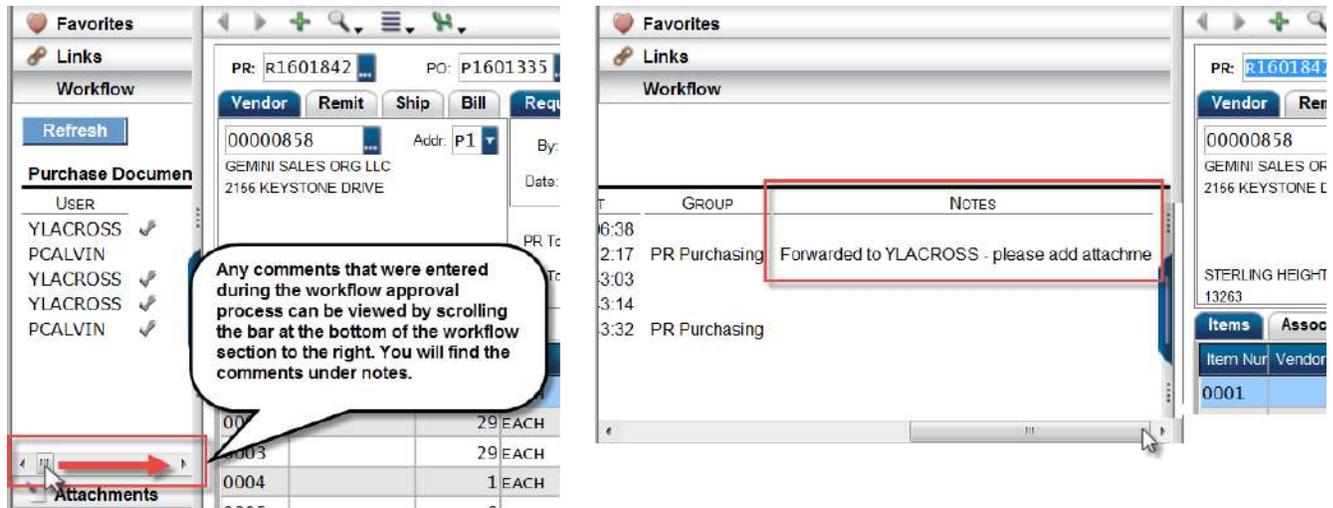
Click on **Workflow** located on the side options menu.

A list of Purchase Requests requiring approval will display under the **Direct Task Items Awaiting ID Approval** heading. These are all Purchase Requests awaiting the User's approval.



The Purchase Request(s) can be viewed by double-clicking on the PR number. The system will then display the Purchase Request on the data entry portion of the screen.

Purchase Requests must be reviewed and approved one by one from this screen.



### 3. Approvals from: Workflow Task list

Approvals may also be given through a task list accessed from the Home page of the Dashboard.

To approve Purchase Request's, double-click on the **'PR Approval'** link to access the task list window. A list of pending PR's will display by Entry User ID.



Select the Purchase Request to review by clicking on the PR number on the list. The system will display details about the selected Purchase Request to the right and also show the approval history located on the top right. The user may then approve, reject or forward the Purchase Request by using the check mark, red x or blue arrow on either the left panel at the bottom or above the Request Summary.

The screenshot shows the 'Task List Items Awaiting Processing - ID Assignments' section on the left and a 'Purchase Request' summary on the right. In the task list, the 'All Pending Tasks' checkbox is checked, and a green checkmark icon is visible at the bottom. In the summary, the purchase request ID 'R1500063' is circled in green, and a red box highlights the 'X' icon in the 'History' table.

It is possible to approve multiple Purchase Requests at once (after previously reviewing them) by checking the box **All Pending Tasks** on the list and using the green check mark at the bottom of the list. The Purchase Requests are not approved until the **Submit** button is clicked.

This screenshot shows the 'Task List Items Awaiting Processing - ID Assignments' section with the 'All Pending Tasks' checkbox checked. A red box highlights this checkbox. At the bottom of the list, there is a green checkmark icon and a red box around the 'X' icon.

**NOTE:** Any text entered in the Comments box will be viewable for all PR's selected for approval or rejection.

After the PR's are approved or rejected, a message will indicate the number of PR's that were successfully processed.

The screenshot shows the top navigation bar with a green checkmark and the message 'Successfully Processed 3 Approval Request(s)'. A red box highlights this message. Below it, the task list section is visible.

To return BusinessPLUS, click the **X** to close out the page and you will be returned to the Home dashboard.

This screenshot shows a browser window with the BusinessPLUS interface. A red arrow points to the 'X' icon in the browser's tab bar, which is used to close the page. The interface below shows the success message 'Successfully Processed 3 Approval Request(s)'.

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## Workflow Considerations

### *Rejected PR's*

When a PR is rejected, an email is sent to the creator of the PR. It is necessary for the creator to make the appropriate changes to the PR in the POUPPR screen and re-submit through the workflow process.

## Reports

The Schools/Departments dashboard has a report section that includes frequently run reports.

### REPORT: OSGL6004: Budget to Actual by Fund-Responsibility

This report displays account budget, encumbrances, actual expenses and the balance. Additional details can be accessed by drilling down in the report (look for a drill as the cursor moves across the report).

OSGL6004: Budget to Actual by Fund-Responsibility / Default

Current Date or a Prior Month End Date:  

Ledger Code:

Fund:

Function:

Program:

Grant:

Location:

Responsibility:

Key:

Object:

Budget Control:

Download to Excel?

[Help](#) [Submit](#)

Budget to Actual by Fund-Responsibility								
As of 2/19/2017								
Org Key / Object	Key Description	Object Description	Budget	Encumbrance	Actual	Balance	% of Utilization	
<b>Type: 5 EXPENDITURE</b>								
<b>Fund: 110 GENERAL FUND</b>								
<b>Resp. Code 0200</b>								
110-252-0000-0000-000-0200-55910000	BUSINESS OFF 02	OFFICE SUPPLIES	5,000.00	23.19	245.21	4,731.60	5.36%	
	<b>Resp. Code: 0200</b>	<b>FINANCE DIRECTOR</b>	<b>Total:</b>	<b>5,000.00</b>	<b>23.19</b>	<b>245.21</b>	<b>4,731.60</b>	<b>5.36%</b>
	<b>Fund: 110</b>	<b>GENERAL FUND</b>	<b>Total:</b>	<b>5,000.00</b>	<b>23.19</b>	<b>245.21</b>	<b>4,731.60</b>	<b>5.36%</b>
	<b>Type: 5</b>	<b>EXPENDITURE</b>	<b>Total:</b>	<b>5,000.00</b>	<b>23.19</b>	<b>245.21</b>	<b>4,731.60</b>	<b>5.36%</b>
		<b>Grand Total</b>	<b>-5,000.00</b>		<b>-245.21</b>			

## REPORT: OSPO5010: Open PO by Responsibility Code

This report will show all open purchase orders by Responsibility Code. This report defaults to allow the user to export the data to Excel. If exporting to Excel is not desired, change the Y to N.

Enter a Responsibility Code to run the report on. Click Submit.

### OSPO5010: Open PO by Responsibility Code / Default

as of Date:

Responsibility Code:

Export to Excel?

[Help](#)

[Submit](#)

OSPO5010: Open PO by Responsibility Code - Windows Internet Explorer

OSPO5010: Open PO by Responsibility Code Page 1 of 10 Help Close

Excel Output

To export the data to Excel, click on the yellow paper clip, then click 'Excel'

**Birmingham Public Schools**  
**Open PO by Responsibility Code**  
As of 2/19/2017

Resp.	PO #	Date Entered	Vendor Name	Item#	Account #	Description	Status	Type	PO Amount	Liquidation	Encumbrance
0200	P1600127	07/20/2015	DICLEMENTE SIEGEL ENGINEI	0001	410-456-0003-0000-000-0200-56220000	ENGINEERS FOR 2015 MECHANICAL REPLACES PO#140449	PP	B	\$15,359.25	\$15,352.77	\$6.48
0200	P1600278	09/28/2015	TMP ARCHITECTURE INC	0001	410-456-0003-0000-000-0200-56220000	DISTRICT WIDE FACILITIES STUDY - PHASE I	PP	B	\$9,425.00	\$9,425.00	\$0.00
0200	P1600278	09/28/2015	TMP ARCHITECTURE INC	0002	410-456-0003-0000-000-0200-56220000	DISTRICT WIDE FACILITIES STUDY - PHASE II	PP	B	\$3,875.00	\$3,487.50	\$387.50
0200	P1600392	10/28/2015	MACDONELL ASSOCIATES AR	0001	410-456-0003-0000-160-0200-56220000	ARCHITECTURAL SERVICES FOR DOOR REPLACEMENT PROJECT AT UPTON ELEMENTARY SCHOOL.	PP	B	\$6,949.00	\$6,161.00	\$788.00
0200	P1600394	12/02/2015	DICLEMENTE SIEGEL ENGINEI	0001	410-456-0003-0000-090-0200-56220000	HOUSE LIGHTS AND ELECTRICAL DESIGN FOR ROYAL OAK HIGH SCHOOL AUDITORIUM (PROJECT # 15-0310.00)	PP	B	\$15,300.00	\$15,300.00	\$0.00
0200	P1600394	12/02/2015	DICLEMENTE SIEGEL ENGINEI	0002	410-456-0003-0000-090-0200-56220000	REIMBURSABLE EXPENSES	PP	B	\$500.00	\$192.70	\$307.30
0200	P1600395	12/01/2015	TMP ARCHITECTURE INC	0001	410-456-0003-0000-090-0200-56220000	DESIGN AND CONSTRUCTION DOCUMENTS FOR ROHS	PP	B	\$15,000.00	\$6,439.84	\$8,560.16