



# BusinessPLUS

(Version 7.9.10)

## Approver Training Guide

06.28.2017

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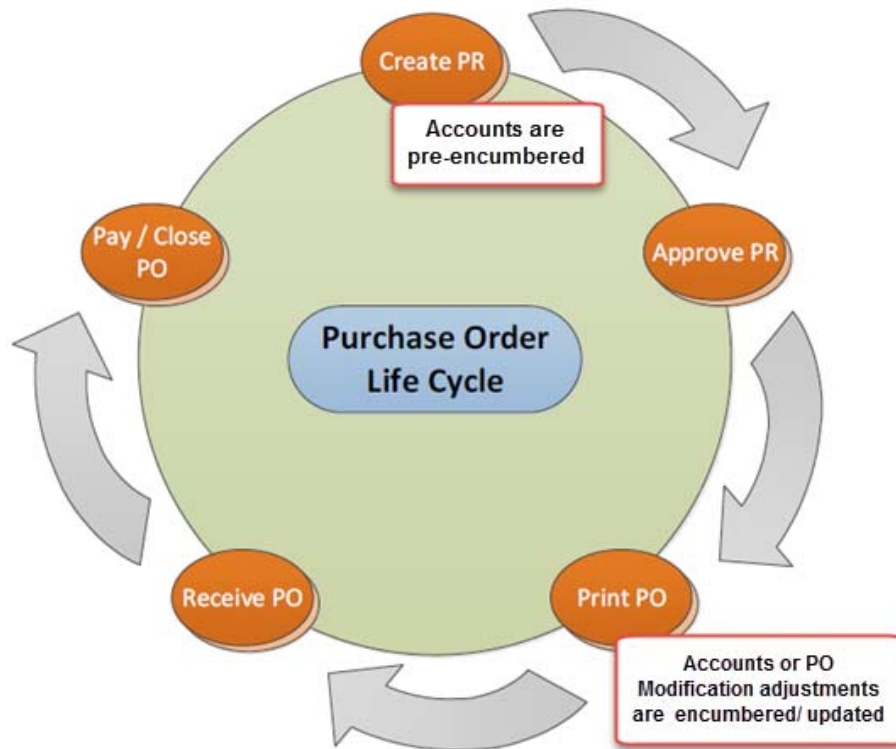
# Approver - Training Guide

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## Table of Contents

Purchase Order Life Cycle.....	2
Purchase Order Types.....	2
Workflow Approvals.....	3
1. Approval from: Email Approvals.....	3
Workflow Approval Options.....	4
2. Approvals from: Enter Purchase Requests – POUPPR screen.....	4
3. Approvals from: Workflow Task list.....	6
Reports.....	8
REPORT: OSGL6004: Budget to Actual by Fund-Responsibility.....	8

## Purchase Order Life Cycle



## Purchase Order Types

There are two types of Purchase Orders that can be created through the POUUPPR 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.
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.

## 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**

**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**

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:

## Workflow Approval Options

When approving Purchase Requests in BusinessPlus, there are three 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 blue arrow will **forward** the Purchase Request to another user for them to approve. Waterford School District does not currently utilize this option.

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

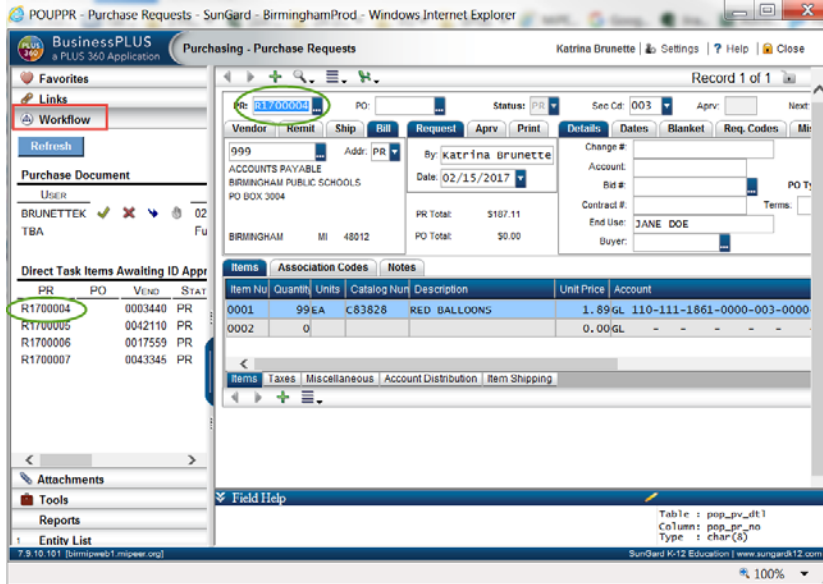
**NOTE:** It is recommended to use the **Comments** box if a PR has been *rejected* to let the Creator know why and to provide further instructions, if any.

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

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

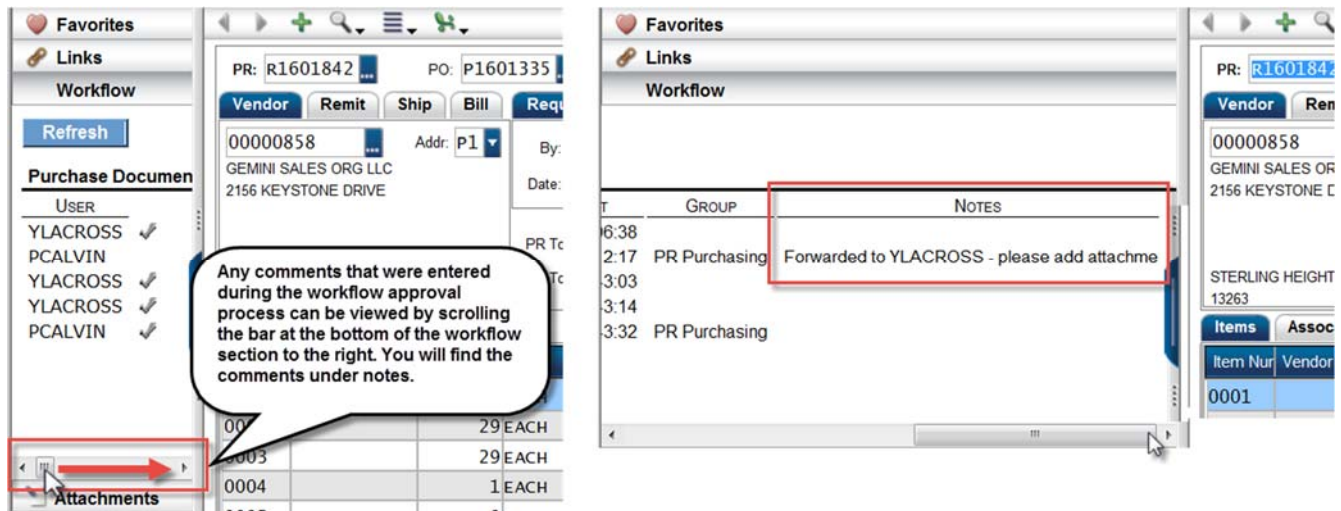
Click on **Workflow** located on the side options menu.

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.

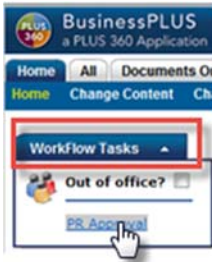
Purchase Requests must be reviewed and approved one by one from this screen.



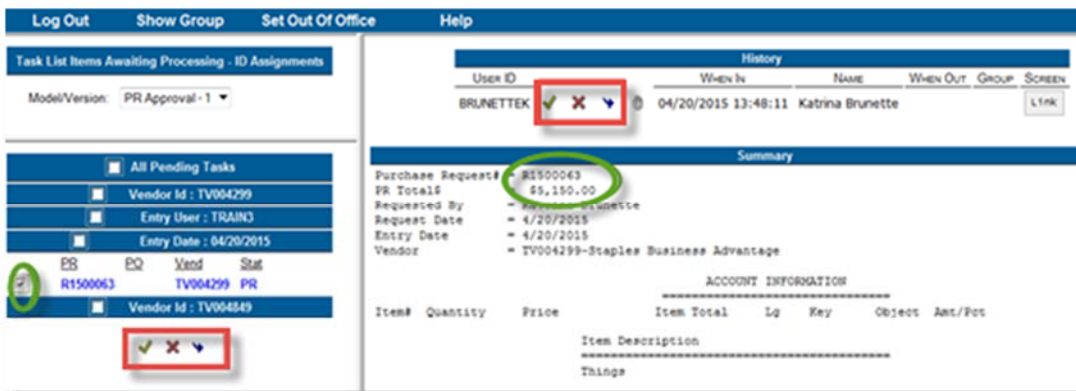
### 3. Approvals from: Workflow Task list

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

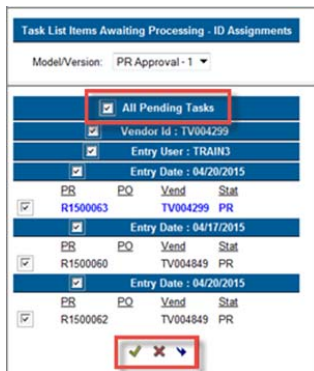
To approve Purchase Request's, double-click on the 'PR Approval' link to access the task list window. A list of pending PR's will display by Entry User ID.



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.



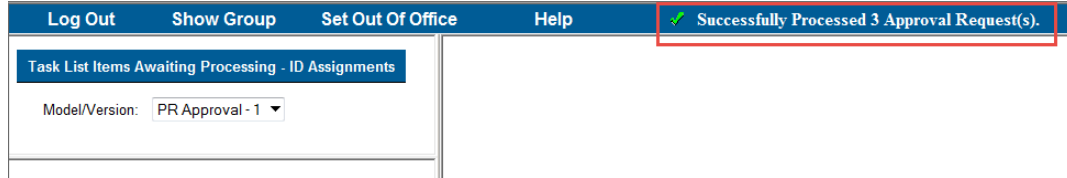
It is possible to approve multiple Purchase Requests at once (after previously reviewing them) by checking the box **All Pending Tasks** on the list and using the green check mark at the bottom of the list. The Purchase Requests are not approved until the **Submit** button is clicked.



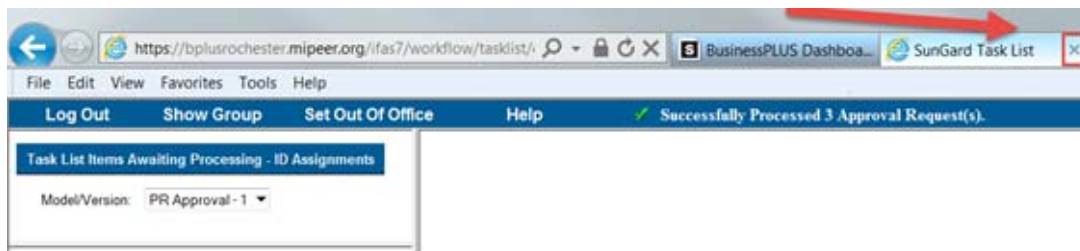
**NOTE:** Any text entered in the Comments box will be viewable for all PR's selected for approval or rejection.



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



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



### *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: OSL6004: 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
Type: 5 EXPENDITURE							
Fund: 110 GENERAL FUND							
Resp. Code 0200							
110-252-0000-0000-000-0200-55910000	BUSINESS OFF 02	OFFICE SUPPLIES	5,000.00	23.19	245.21	4,731.60	5.36%
	Resp. Code: 0200	FINANCE DIRECTOR	Total: 5,000.00	23.19	245.21	4,731.60	5.36%
	Fund: 110	GENERAL FUND	Total: 5,000.00	23.19	245.21	4,731.60	5.36%
	Type: 5	EXPENDITURE	Total: 5,000.00	23.19	245.21	4,731.60	5.36%
Grand Total			-5,000.00		-245.21		