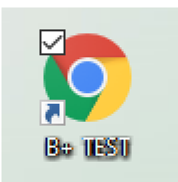
BusinessPLUS Approvals – Purchase Requests

Approving Purchase Requests (PRs) in BusinessPLUS is fast and easy! You just need to log in to BusinessPLUS and in a few steps your purchase is on its way to being a Purchase Order (PO). As you begin this process, please keep in mind:

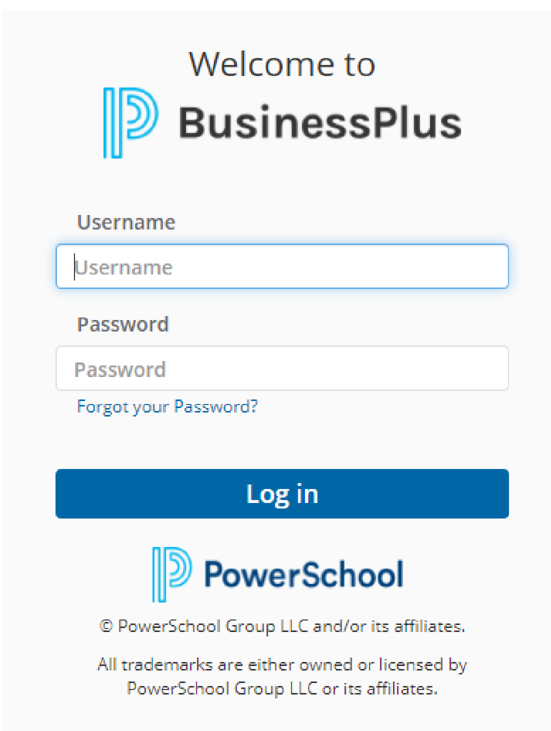
- Your ID in BusinessPLUS is like your signature. Anything done in the system with your ID is your responsibility, so do not share your ID and password with others.
- The information you normally receive from your staff to help you evaluate a purchase can be scanned and attached to a PR. Talk with your finance staff about what information you would like included to help in your review.
- Remember to put your “Out of Office” on when you will be away from the office for an extended period. BusinessPLUS will automatically route Purchase Requests to your assigned backup so the work keeps flowing.

Step 1: Log in to BusinessPLUS

Click on the Chrome browser link

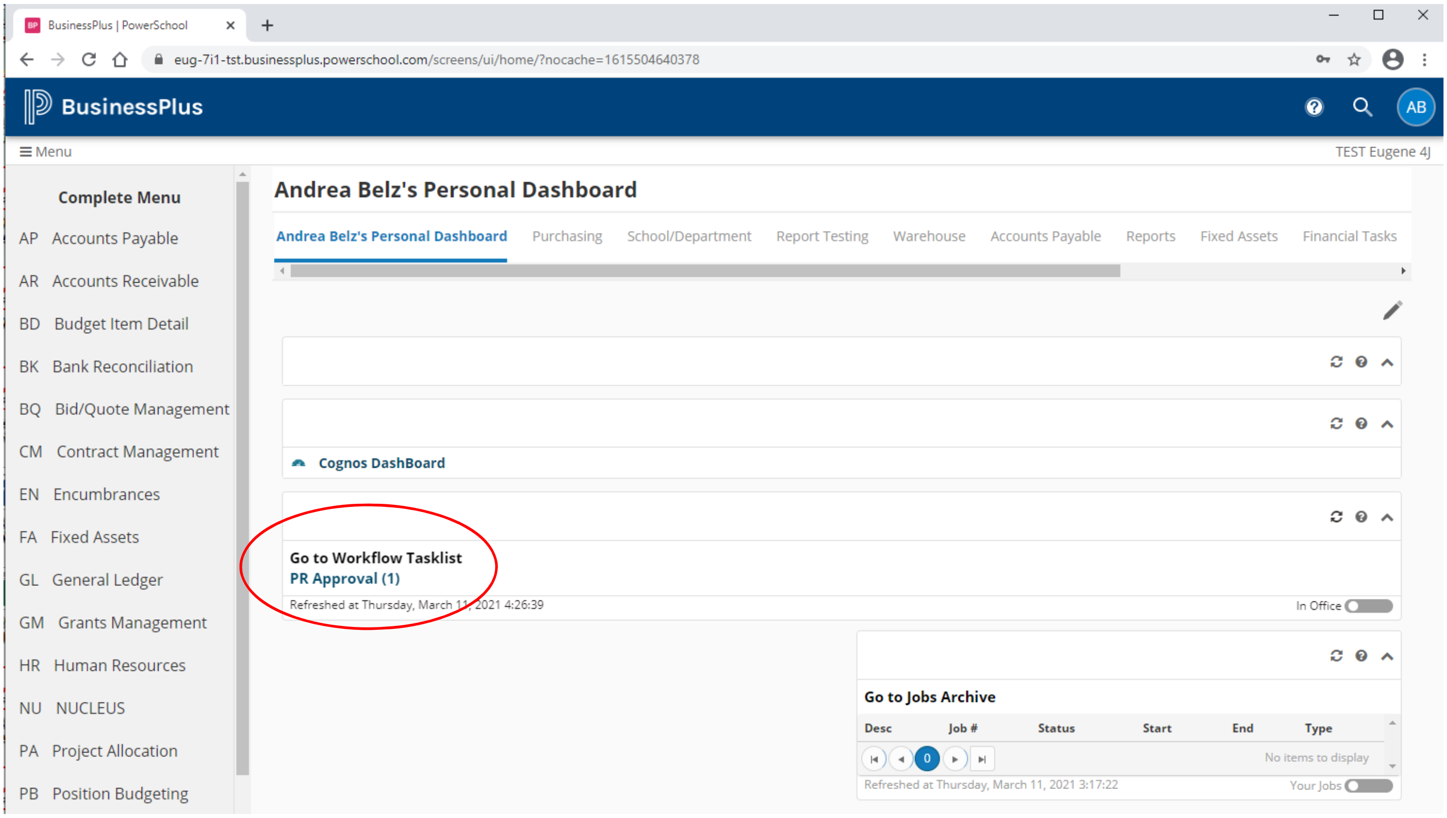


Enter your User name and Password, and then click the “Log in” button

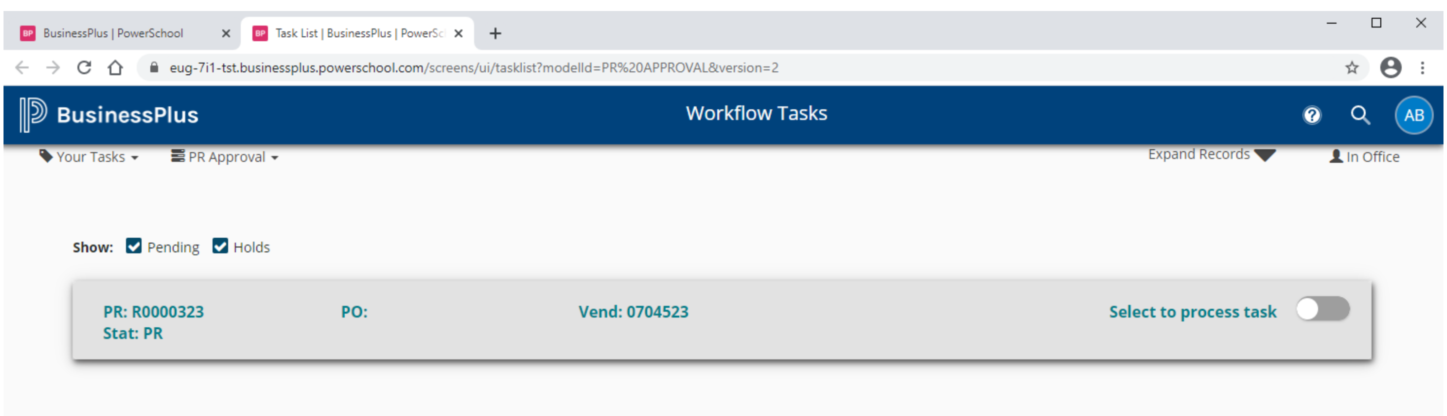


Step 2: Go to your Workflow Tasklist

Click on the link for PR Approval

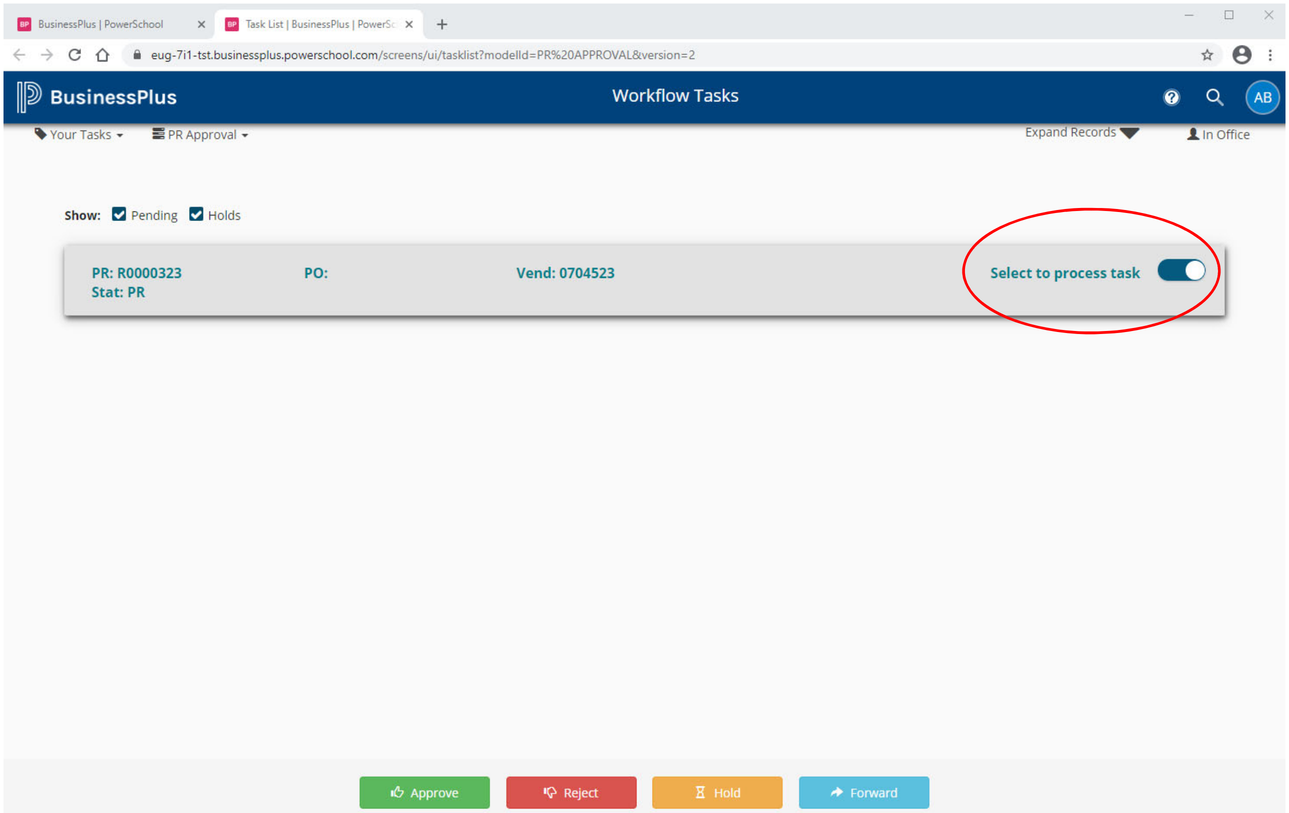


A new tab will open for Workflow Tasks

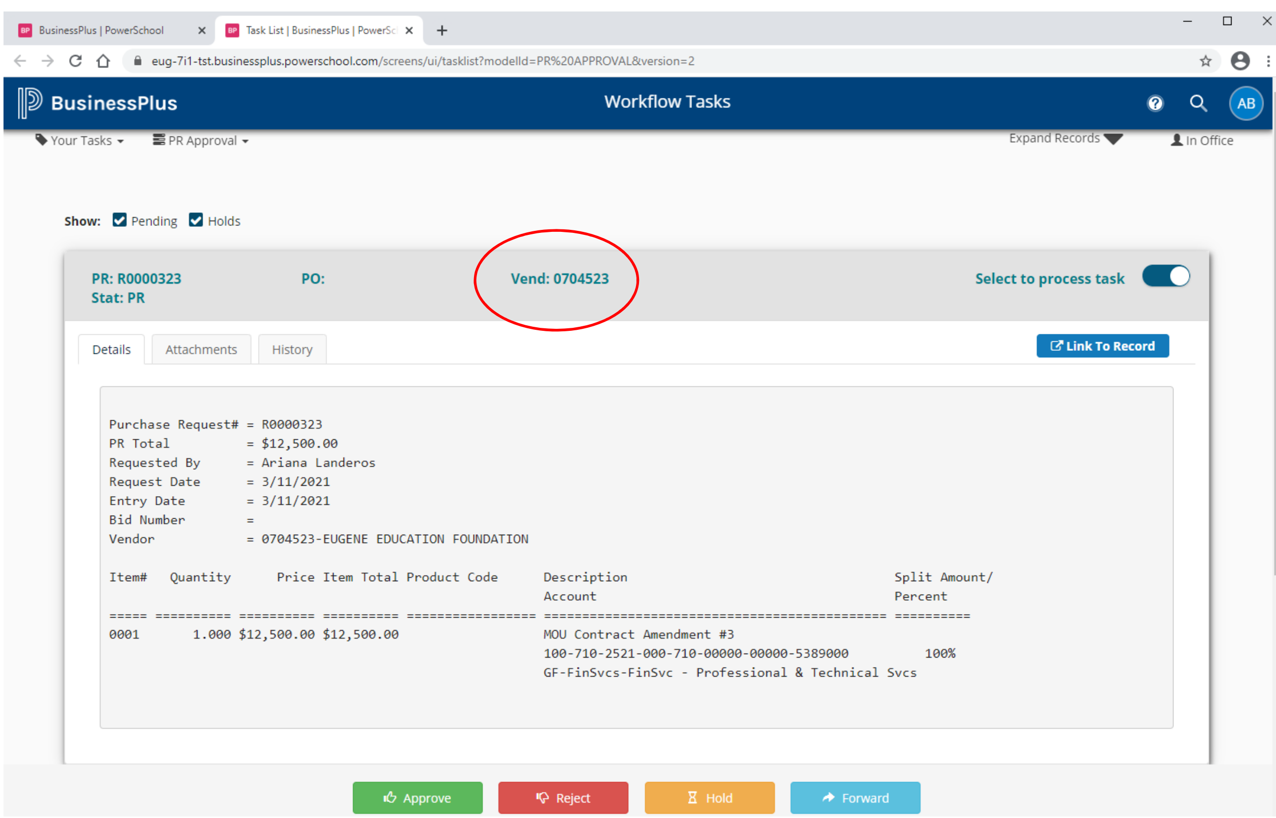


Step 3: Review the Purchase Request (PR)

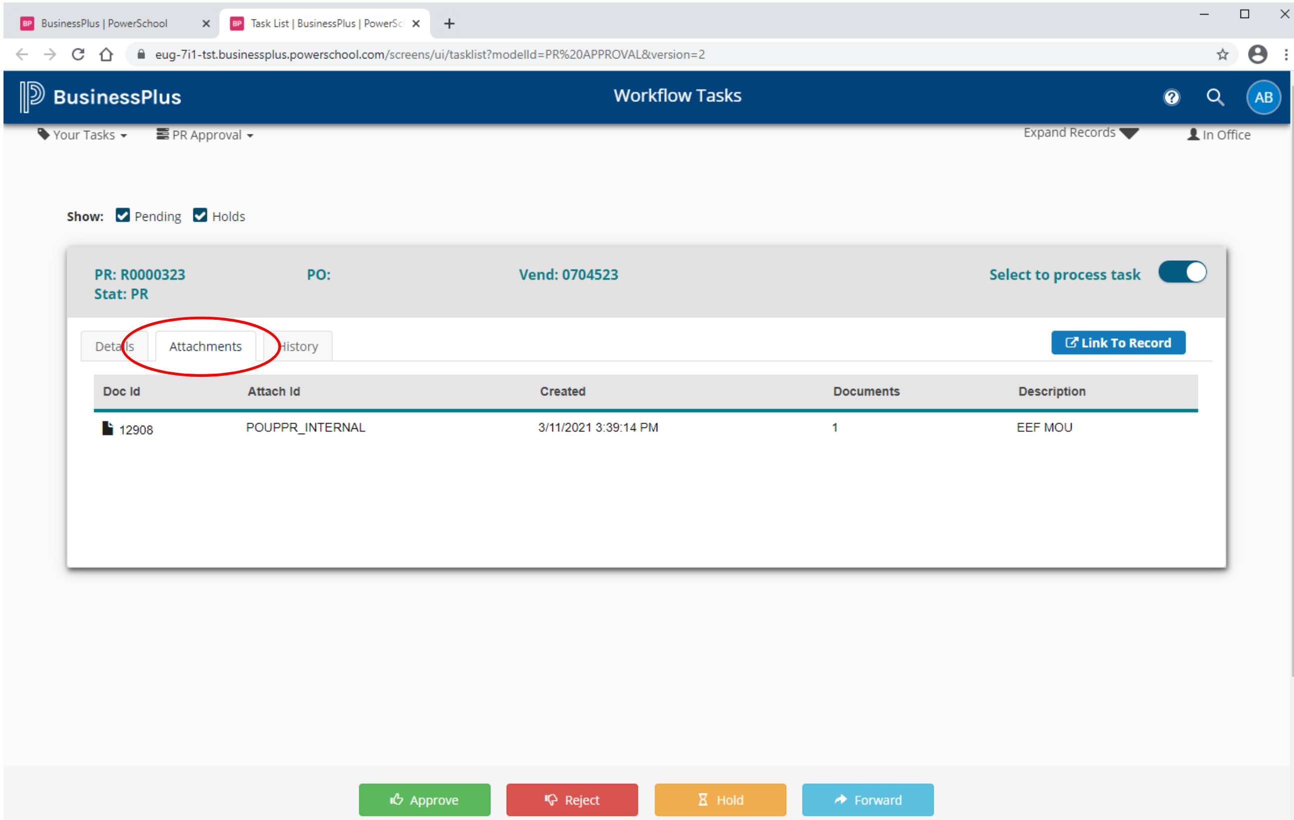
Slide the “Select to process task” button to the right. This will bring up the action buttons at the bottom of the screen.



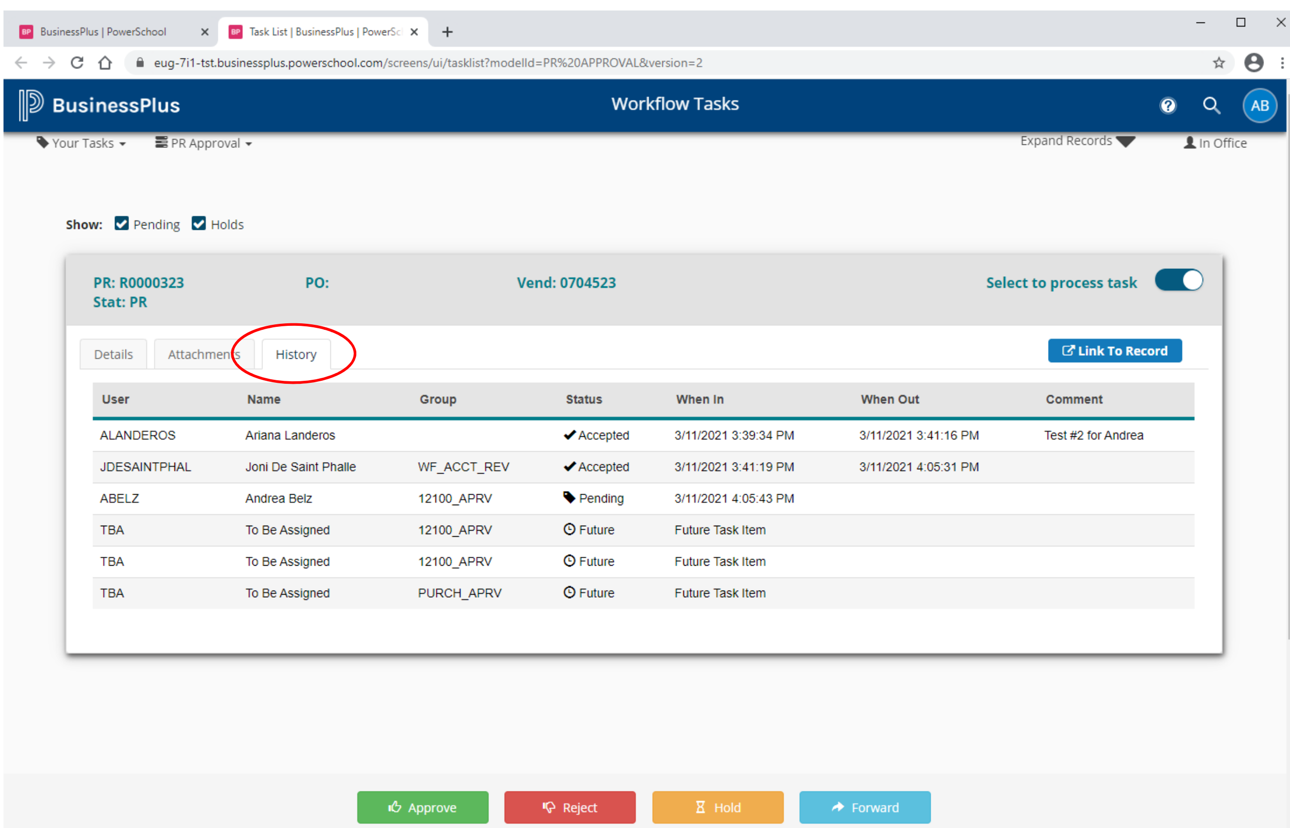
Click the Vend number to open the Purchase Request Approval screen and review the request details.



Click on the “Attachments” tab to view any documents that have been attached to the request. Click the attachment (right under the “Attach Id” column header) to view the document. It will open in a separate tab.

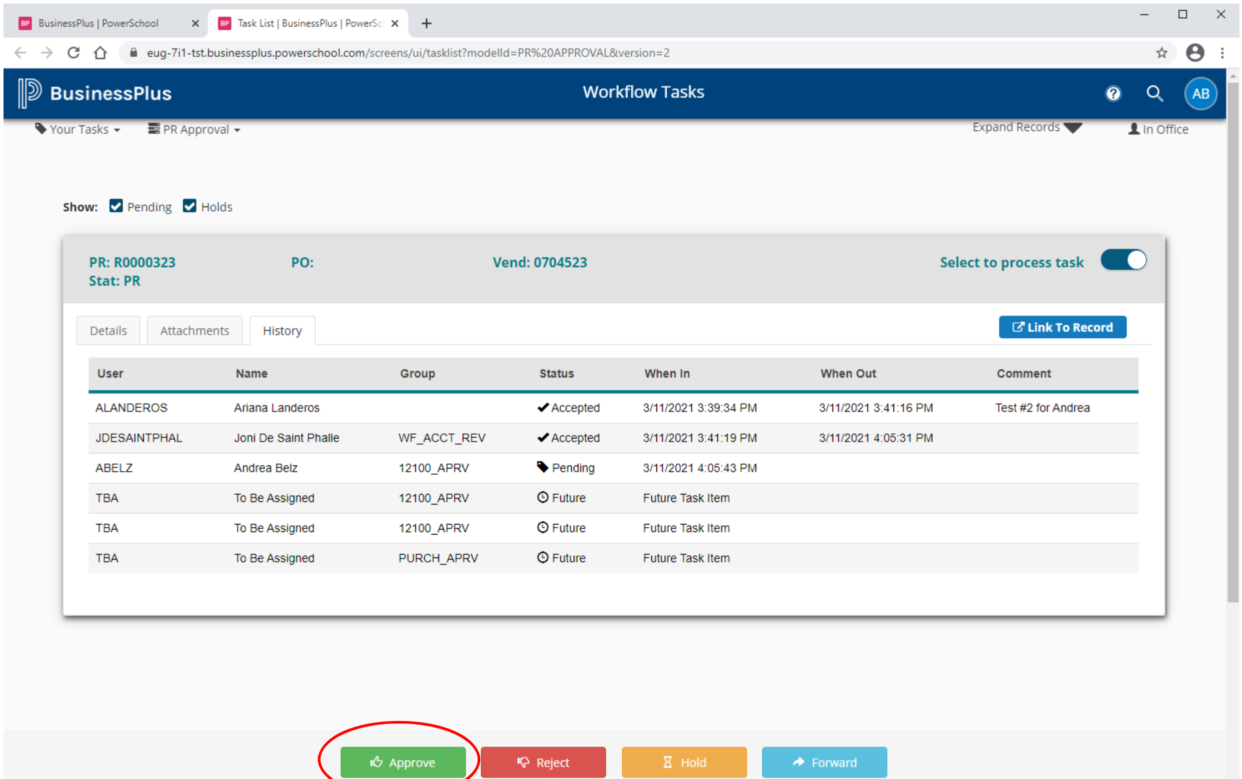


Click on the “History” tab to view prior reviews and approvals.

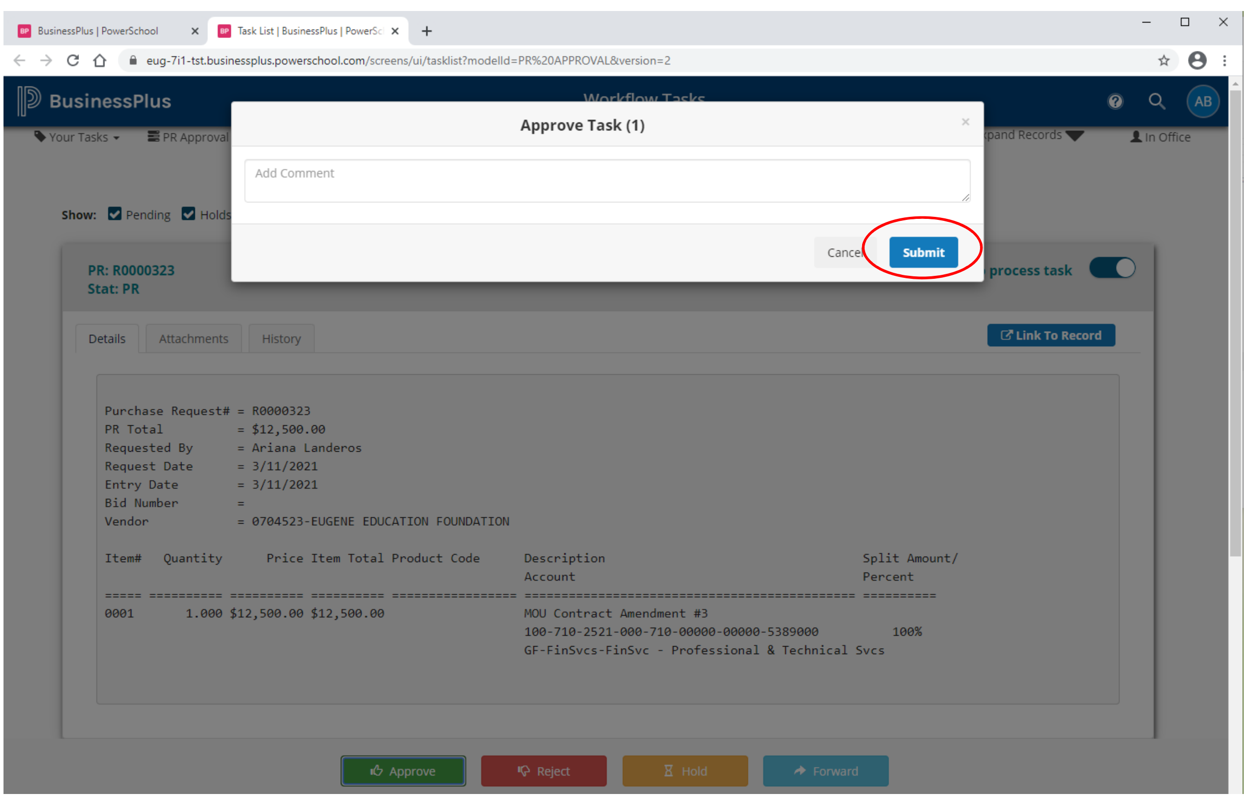


Step 4: Approve or Reject the Purchase Request (PR)

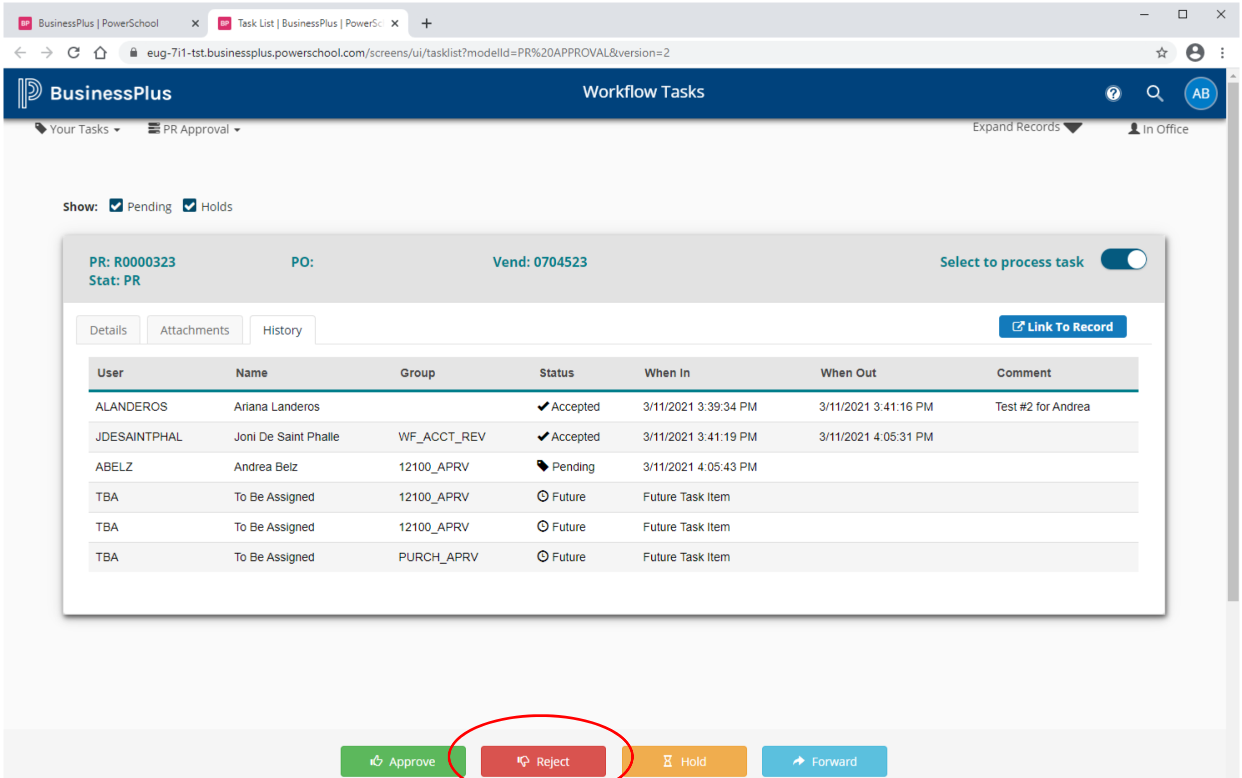
To approve the Purchase Request, click the green “Approve” button at the bottom of the screen.



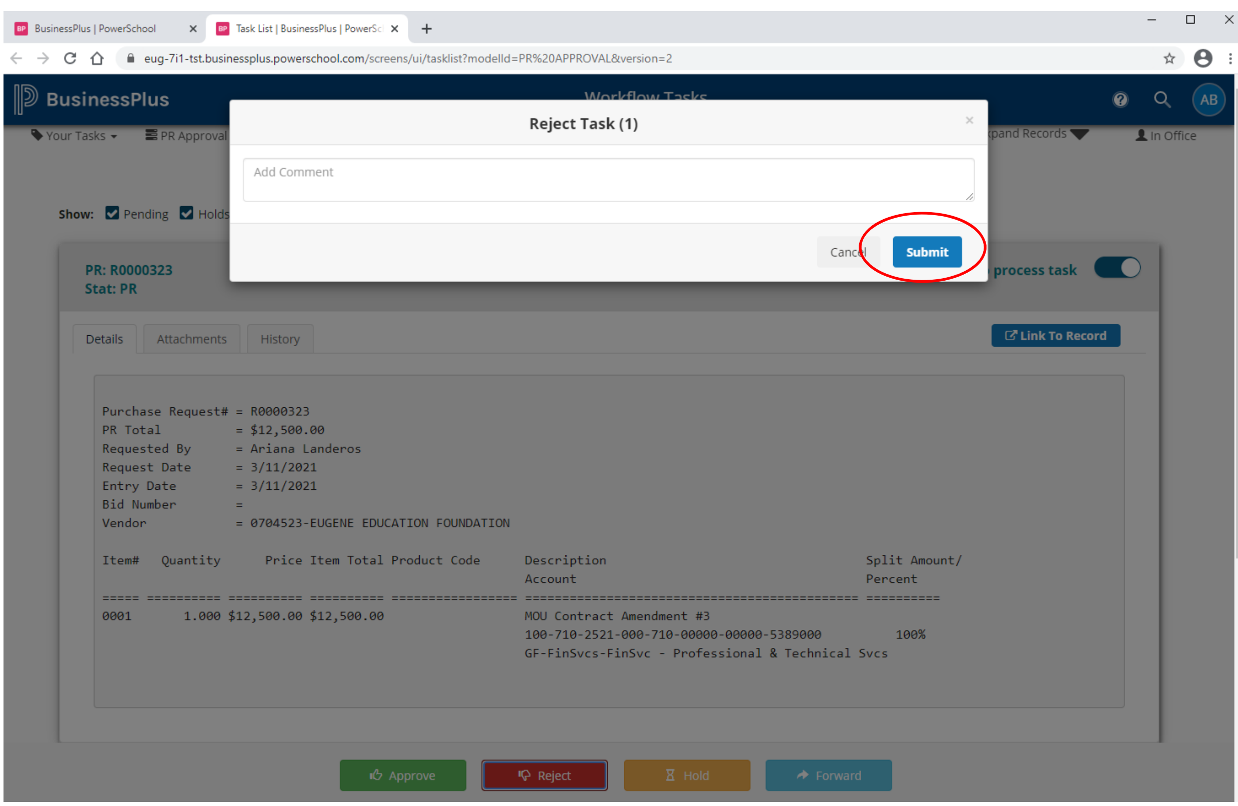
You can add any comments you would like by clicking in the “Add Comment” box. Click the “Submit” button to approve the PR and send it back into the workflow for processing.



To deny the Purchase Request, click the red “Reject” button at the bottom of the screen.

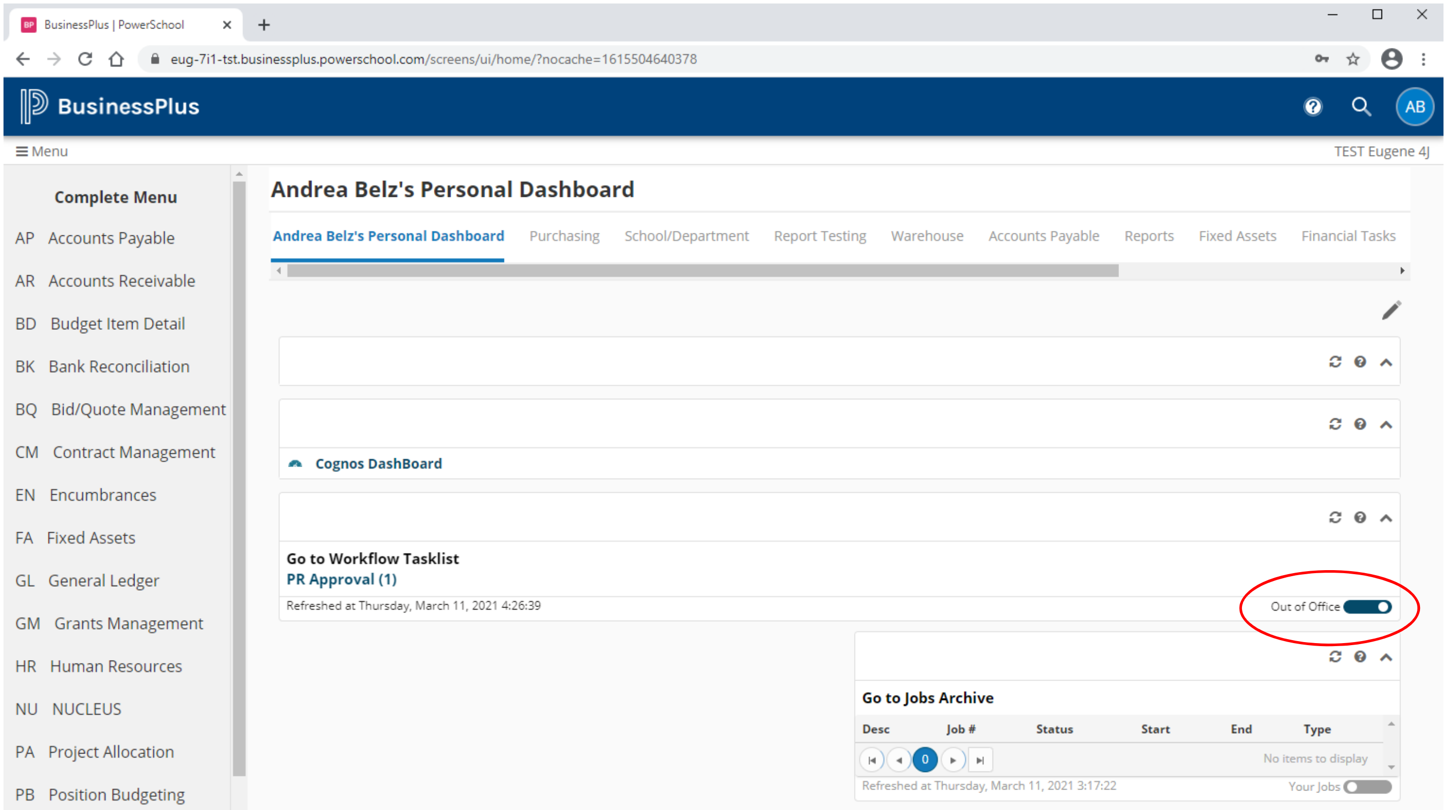


Document your reasoning for denying the PR by clicking in the “Add Comment” box. Click the “Submit” button to reject the PR and send it back to the creator for correction.



Setting Your "Out of Office"

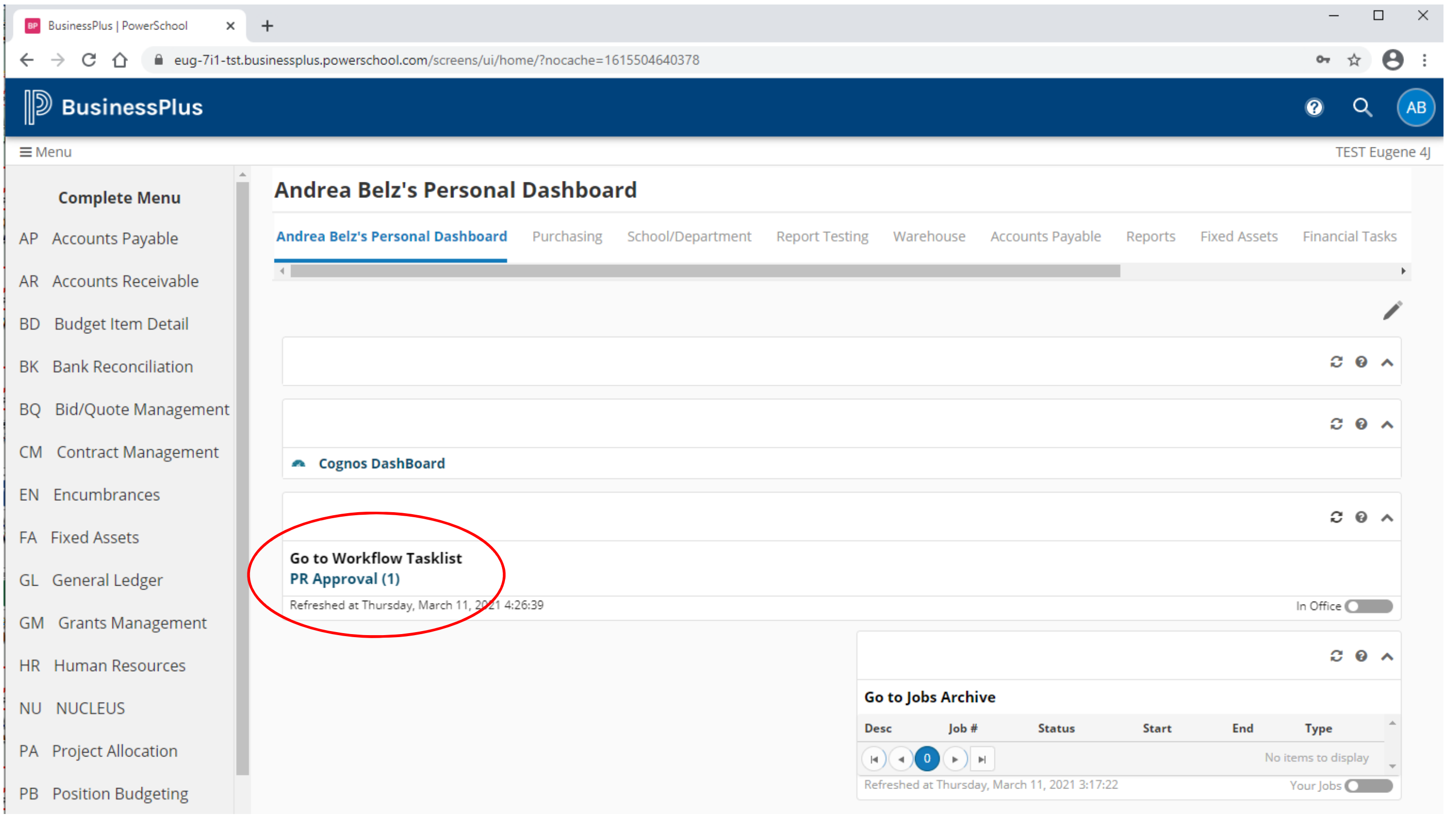
If you are going to be away please set your out of office so approval requests will automatically route to your assigned backup(s). Slide the selector to the right until "Out of Office" appears. When you return, simply slide the selector back to the left to turn off your out of office selection.



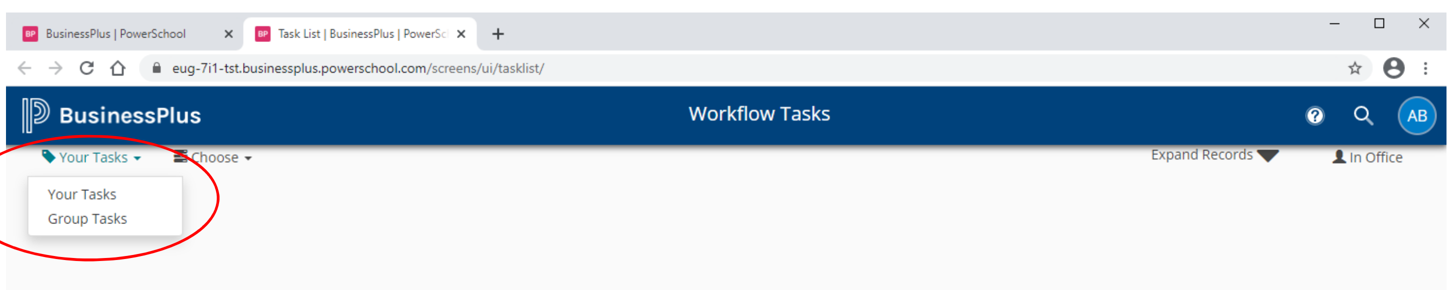
Approving Workgroup PRs

Workgroups in BusinessPLUS allow other authorized staff members to review and approve or deny a PR when the primary reviewer is not available. If the primary reviewer sets their “Out of Office” slider, the PR will automatically route to the next staff member in the workgroup and appear in their Tasklist. If this hasn’t happened, workgroup members can still access waiting PRs using the following steps:

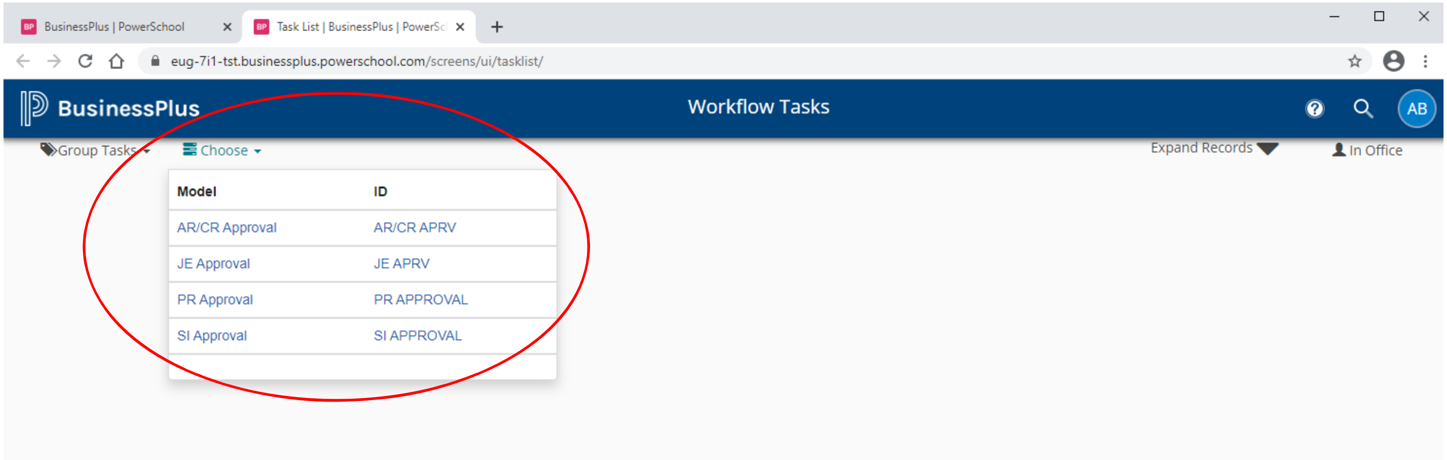
Click the “Go to Workflow Tasklist” title to open your Tasklist.



Click on the Your Tasks drop-down list and select “Group Tasks.”



Click on the Choose drop-down list and select “PR Approval.”



Find the PR you need to review and follow steps 3 and 4 above to process.