

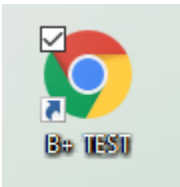
BusinessPLUS Approvals – Purchase Requests

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

A screenshot of the BusinessPLUS login page. At the top, it says 'Welcome to BusinessPlus' with the BusinessPLUS logo. Below that are two input fields: 'Username' and 'Password'. The 'Username' field contains the text 'Username'. Below the 'Password' field is a link that says 'Forgot your Password?'. At the bottom of the form is a blue button labeled 'Log in'. Below the login form is the PowerSchool logo and copyright information: '© PowerSchool Group LLC and/or its affiliates. All trademarks are either owned or licensed by PowerSchool Group LLC or its affiliates.'

Step 2: Go to your Workflow Tasklist

Click on the link for PR Approval

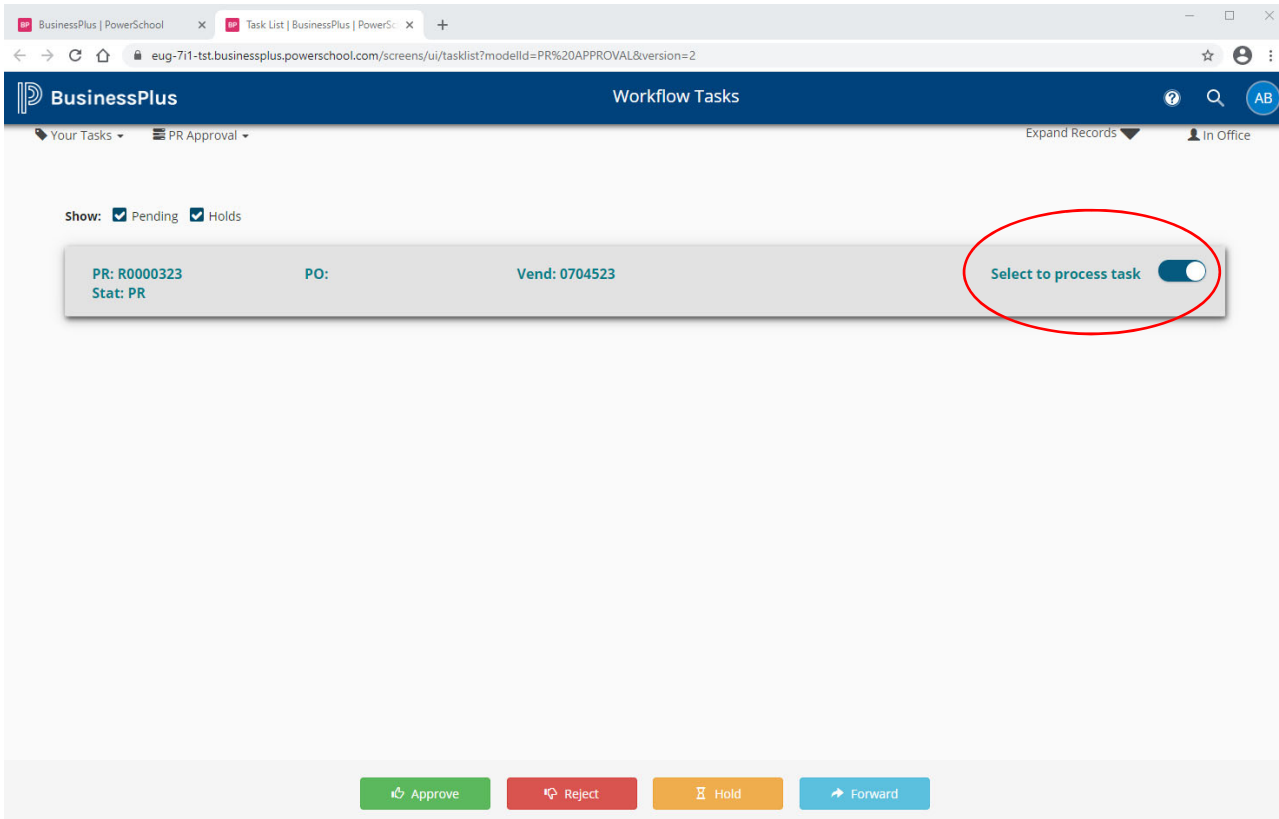
The screenshot shows the BusinessPlus Personal Dashboard for Andrea Belz. The dashboard includes a navigation menu on the left with categories like Accounts Payable, Accounts Receivable, Budget Item Detail, Bank Reconciliation, Did/Quote Management, Contract Management, Encumbrances, Fixed Assets, General Ledger, Grants Management, Human Resources, NUCLEUS, Project Allocation, and Position Budgeting. The main content area displays several widgets: 'Cognos DashBoard', 'Go to Workflow Tasklist PR Approval (1)' (circled in red), and 'Go to Jobs Archive'. The 'Go to Workflow Tasklist PR Approval (1)' widget shows it was refreshed at Thursday, March 11, 2021 4:26:39. The 'Go to Jobs Archive' widget shows a table with columns for Desc, Job #, Status, Start, End, and Type, and indicates 'No items to display'.

A new tab will open for Workflow Tasks

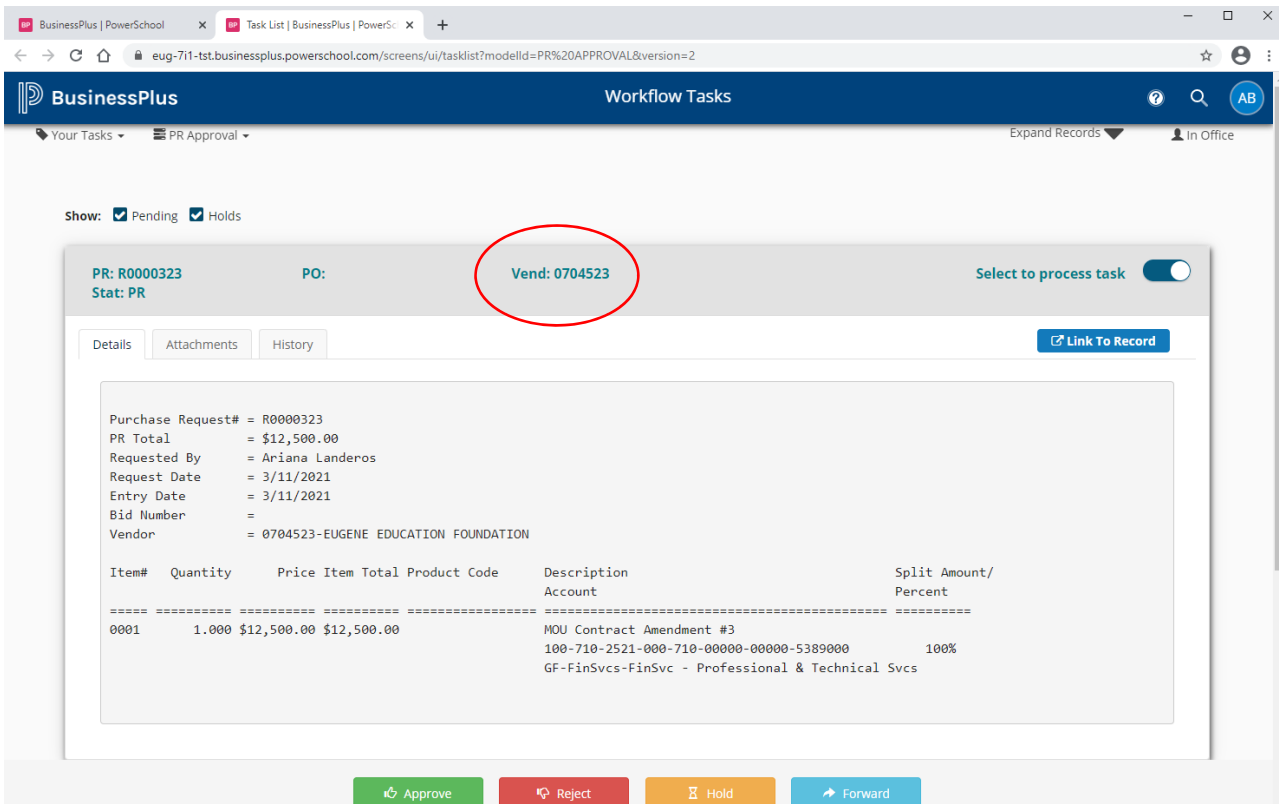
The screenshot shows the BusinessPlus Workflow Tasks page. The page title is 'Workflow Tasks'. The navigation bar includes 'Your Tasks' and 'PR Approval'. The main content area shows a task list with the following details: PR: R0000323, PO:, Vend: 0704523, and a 'Select to process task' toggle. The task is currently in a 'Pending' state.

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.

The screenshot shows the BusinessPlus Workflow Tasks interface. At the top, there are navigation tabs for 'Details', 'Attachments', and 'History'. The 'Attachments' tab is selected and circled in red. Below the tabs is a table with the following data:

Doc Id	Attach Id	Created	Documents	Description
12908	POUPPR_INTERNAL	3/11/2021 3:39:14 PM	1	EEF MOU

At the bottom of the interface, there are four action buttons: 'Approve' (green), 'Reject' (red), 'Hold' (orange), and 'Forward' (blue).

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

The screenshot shows the BusinessPlus Workflow Tasks interface with the 'History' tab selected and circled in red. Below the tabs is a table with the following data:

User	Name	Group	Status	When In	When Out	Comment
ALANDEROS	Ariana Landeros		Accepted	3/11/2021 3:39:34 PM	3/11/2021 3:41:16 PM	Test #2 for Andrea
JDESAINTPHAL	Joni De Saint Phalle	WF_ACCT_REV	Accepted	3/11/2021 3:41:19 PM	3/11/2021 4:05:31 PM	
ABELZ	Andrea Belz	12100_APRV	Pending	3/11/2021 4:05:43 PM		
TBA	To Be Assigned	12100_APRV	Future	Future Task Item		
TBA	To Be Assigned	12100_APRV	Future	Future Task Item		
TBA	To Be Assigned	PURCH_APRV	Future	Future Task Item		

At the bottom of the interface, there are four action buttons: 'Approve' (green), 'Reject' (red), 'Hold' (orange), and 'Forward' (blue).

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.

The screenshot shows the BusinessPlus Workflow Tasks interface. At the top, there are tabs for 'Your Tasks' and 'PR Approval'. The main content area displays a task list for PR: R0000323, Stat: PR, and Vendor: 0704523. The task list includes columns for User, Name, Group, Status, When In, When Out, and Comment. The 'Approve' button is circled in red.

User	Name	Group	Status	When In	When Out	Comment
ALANDEROS	Ariana Landeros		✓ Accepted	3/11/2021 3:39:34 PM	3/11/2021 3:41:16 PM	Test #2 for Andrea
JDESAINTPHAL	Joni De Saint Phalle	WF_ACCT_REV	✓ Accepted	3/11/2021 3:41:19 PM	3/11/2021 4:05:31 PM	
ABELZ	Andrea Belz	12100_APRV	⌚ Pending	3/11/2021 4:05:43 PM		
TBA	To Be Assigned	12100_APRV	⌚ Future	Future Task Item		
TBA	To Be Assigned	12100_APRV	⌚ Future	Future Task Item		
TBA	To Be Assigned	PURCH_APRV	⌚ Future	Future Task Item		

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.

The screenshot shows the BusinessPlus Workflow Tasks interface with the 'Approve Task (1)' dialog box open. The dialog box has an 'Add Comment' text area and a 'Submit' button circled in red. The background shows the task details for PR: R0000323, Stat: PR, and Vendor: 0704523-EUGENE EDUCATION FOUNDATION.

Purchase Request# = R0000323
PR Total = \$12,500.00
Requested By = Ariana Landeros
Request Date = 3/11/2021
Entry Date = 3/11/2021
Bid Number =
Vendor = 0704523-EUGENE EDUCATION FOUNDATION

Item#	Quantity	Price	Item Total	Product Code	Description Account	Split Amount/Percent
0001	1.000	\$12,500.00	\$12,500.00		MOU Contract Amendment #3 100-710-2521-000-710-00000-00000-5389000 GF-FinSvcs-FinSvc - Professional & Technical Svcs	100%

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

The screenshot shows the BusinessPlus Workflow Tasks interface. At the top, there are navigation tabs for 'Your Tasks' and 'PR Approval'. The main content area displays a task list for PR: R0000323. The task list includes columns for User, Name, Group, Status, When In, When Out, and Comment. The 'Reject' button is circled in red.

User	Name	Group	Status	When In	When Out	Comment
ALANDEROS	Ariana Landeros		✓ Accepted	3/11/2021 3:39:34 PM	3/11/2021 3:41:16 PM	Test #2 for Andrea
JDESAINTPHAL	Joni De Saint Phalle	WF_ACCT_REV	✓ Accepted	3/11/2021 3:41:19 PM	3/11/2021 4:05:31 PM	
ABELZ	Andrea Belz	12100_APRV	🕒 Pending	3/11/2021 4:05:43 PM		
TBA	To Be Assigned	12100_APRV	🕒 Future	Future Task Item		
TBA	To Be Assigned	12100_APRV	🕒 Future	Future Task Item		
TBA	To Be Assigned	PURCH_APRV	🕒 Future	Future Task Item		

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.

The screenshot shows the BusinessPlus Workflow Tasks interface with a 'Reject Task (1)' dialog box open. The dialog box has an 'Add Comment' text area and a 'Submit' button circled in red. The background shows the task details for PR: R0000323.

Purchase Request# = R0000323
PR Total = \$12,500.00
Requested By = Ariana Landeros
Request Date = 3/11/2021
Entry Date = 3/11/2021
Bid Number =
Vendor = 0704523-EUGENE EDUCATION FOUNDATION

Item#	Quantity	Price	Item Total	Product Code	Description	Split Amount/Percent
0001	1.000	\$12,500.00	\$12,500.00		MOU Contract Amendment #3 100-710-2521-000-710-00000-00000-5389000 GF-FinSvcs-FinSvc - Professional & Technical Svcs	100%

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.

The screenshot shows the BusinessPlus Personal Dashboard for Andrea Belz. The dashboard includes a navigation menu on the left with categories like Accounts Payable, Accounts Receivable, Budget Item Detail, Bank Reconciliation, Bid/Quote Management, Contract Management, Encumbrances, Fixed Assets, General Ledger, Grants Management, Human Resources, NUCLEUS, Project Allocation, and Position Budgeting. The main content area is titled "Andrea Belz's Personal Dashboard" and contains several sections: "Cognos DashBoard", "Go to Workflow Tasklist PR Approval (1)", and "Go to Jobs Archive". The "Go to Workflow Tasklist" section shows a tasklist with one item, "PR Approval (1)", and a refresh button. The "Out of Office" toggle switch is highlighted with a red circle, indicating it is currently turned on.

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eug-711-tst.businessplus.powerschool.com/screens/ui/home/?nocache=1615504640378

BusinessPlus

Menu TEST Eugene 4J

Andrea Belz's Personal Dashboard

Andrea Belz's Personal Dashboard Purchasing School/Department Report Testing Warehouse Accounts Payable Reports Fixed Assets Financial Tasks

Cognos DashBoard

Go to Workflow Tasklist
PR Approval (1)
Refreshed at Thursday, March 11, 2021 4:26:39

Out of Office

Go to Jobs Archive

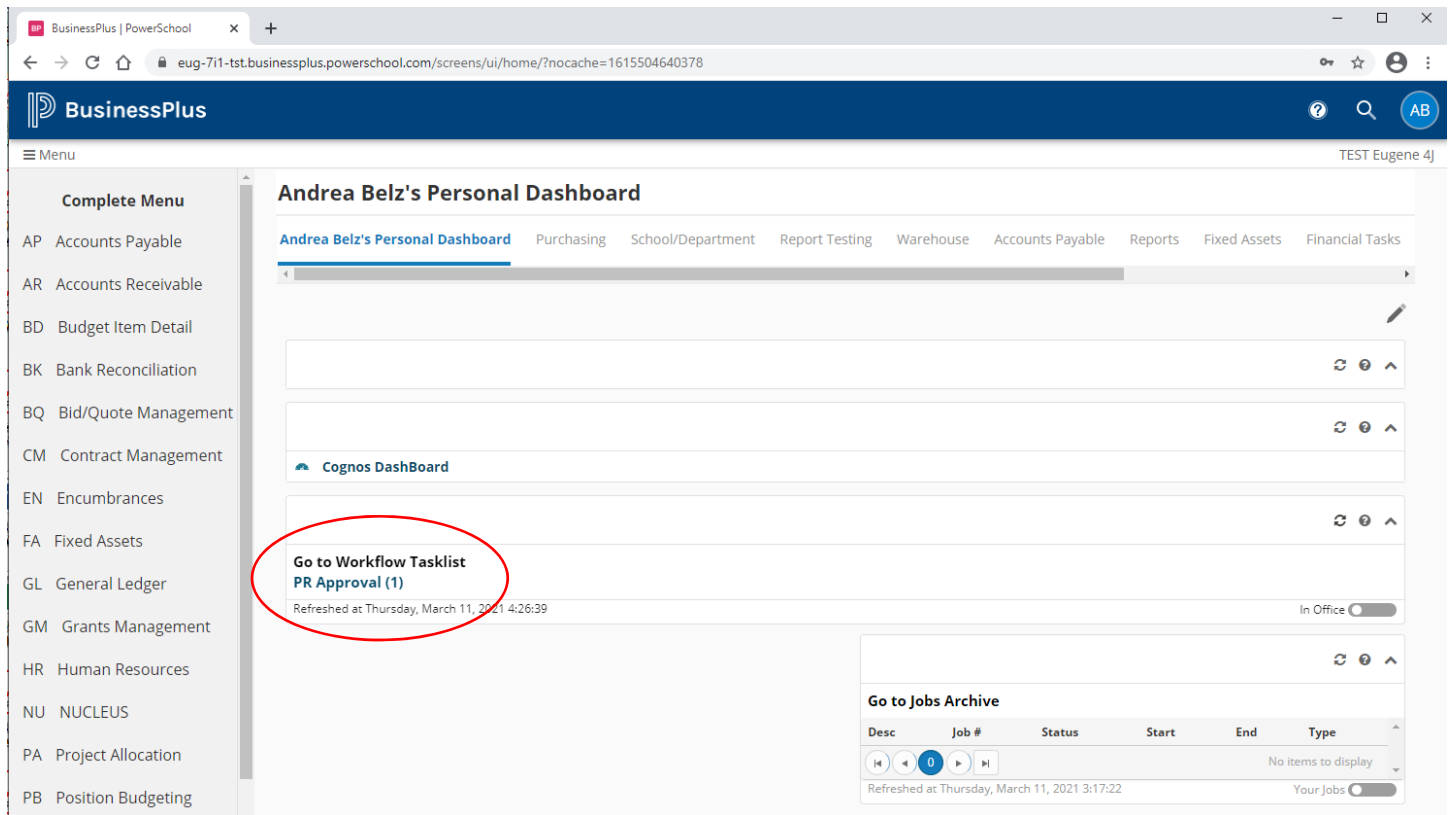
Desc	Job #	Status	Start	End	Type
No items to display					

Refreshed at Thursday, March 11, 2021 3:17:22 Your Jobs

Approving Workgroup PRs

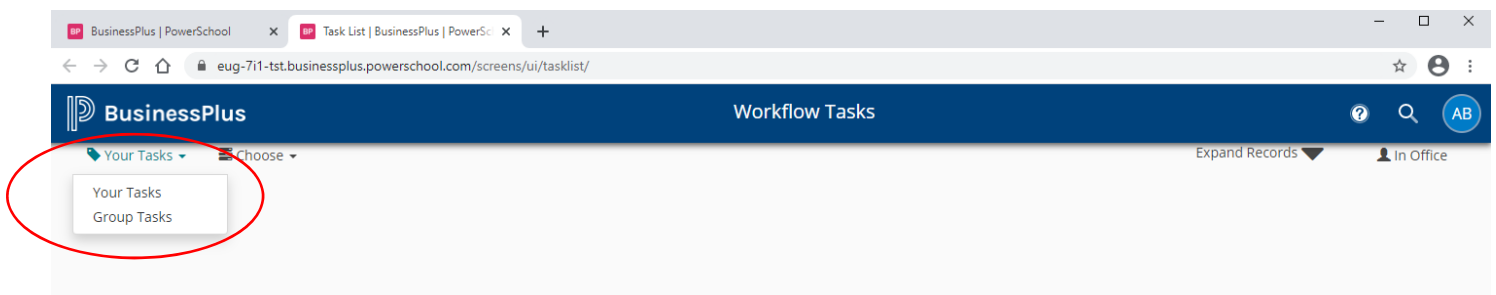
Workgroups in BusinessPLUS allow other authorized staff members to review and approve or deny a PR when the primary reviewer is not available. If the primary reviewer sets their “Out of Office” slider, the PR will automatically route to the next staff member in the workgroup and appear in their Tasklist. 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.



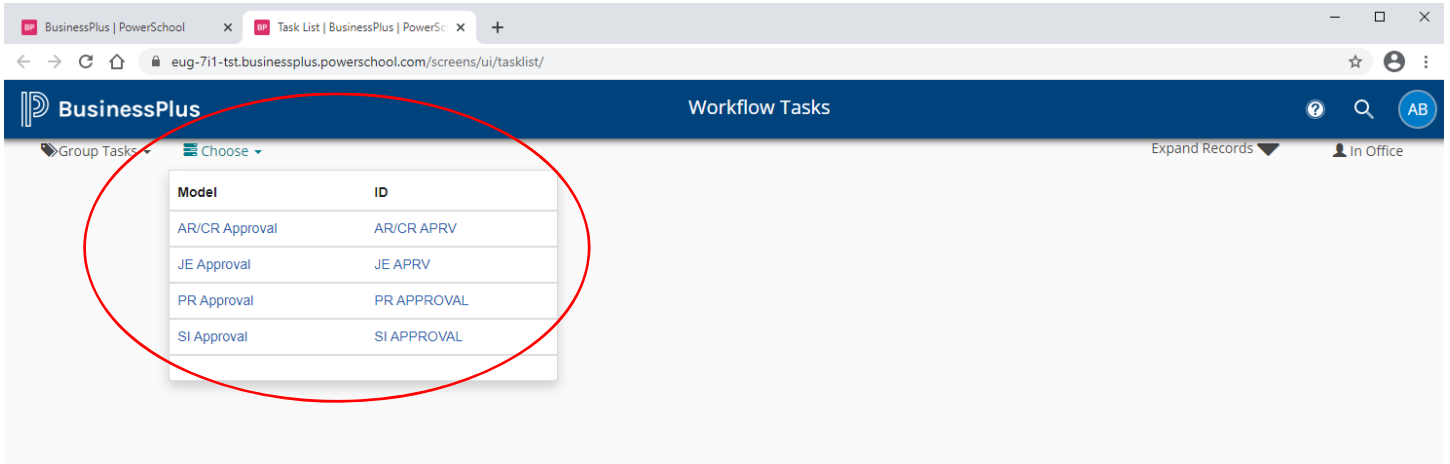
The screenshot shows the BusinessPLUS interface for Andrea Belz's Personal Dashboard. The left sidebar contains a 'Complete Menu' with various accounting and HR options. The main content area displays several task cards. The card titled 'Go to Workflow Tasklist PR Approval (1)' is circled in red. Below it is a 'Cognos DashBoard' card, and further down is a 'Go to Jobs Archive' card which includes a table with columns for Desc, Job #, Status, Start, End, and Type. The 'Go to Jobs Archive' table currently shows 'No items to display'.

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



The screenshot shows the 'Workflow Tasks' page in BusinessPLUS. At the top, there are two browser tabs: 'BusinessPlus | PowerSchool' and 'Task List | BusinessPlus | PowerSc'. The main header area displays 'BusinessPLUS' and 'Workflow Tasks'. Below the header, there is a 'Your Tasks' drop-down menu which is open, showing two options: 'Your Tasks' and 'Group Tasks'. The 'Group Tasks' option is circled in red. To the right of the drop-down menu, there is a 'Choose' button and an 'Expand Records' dropdown menu. The user's name 'In Office' is visible in the top right corner.

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.

