

OCDE

Business Applications

BusinessPLUS
Purchasing Approvals
for Sites / Departments
(PO115)



May 2017

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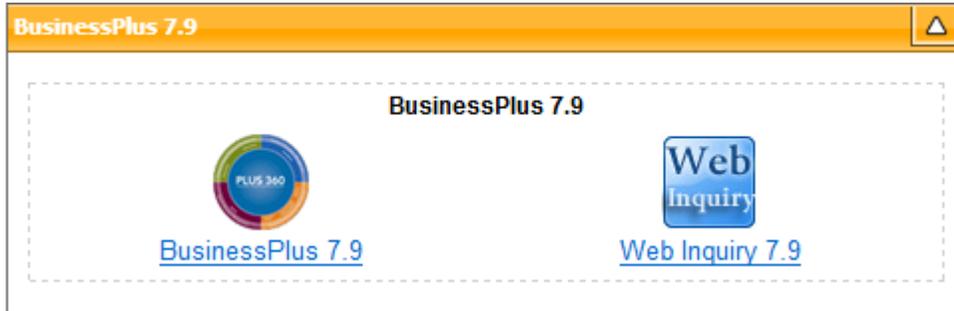
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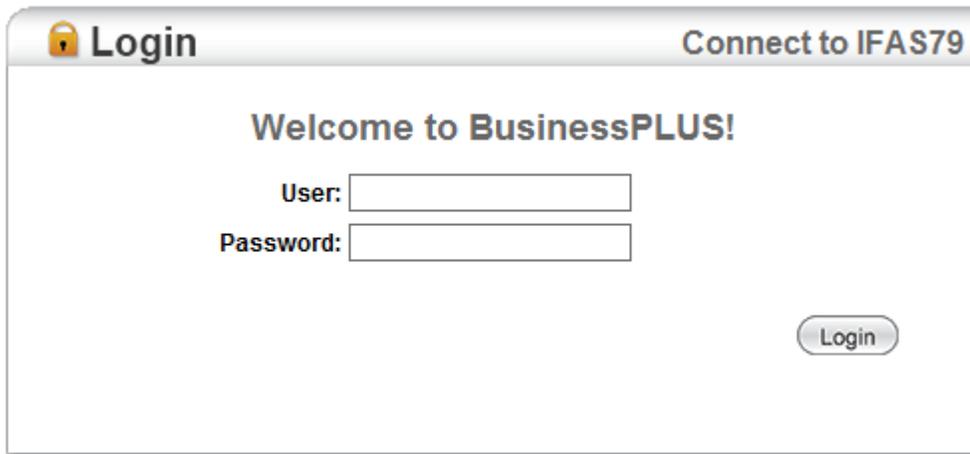
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How to Login/Logoff

Once the user has successfully logged into Stoneware and the Business Applications dashboard is launched click on the BusinessPLUS 7.9 link.

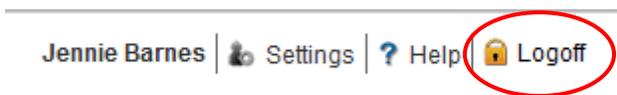


The Login will be automatic since the passwords are stored in the Stoneware “Applications Password” tab.



Logging off of BusinessPLUS

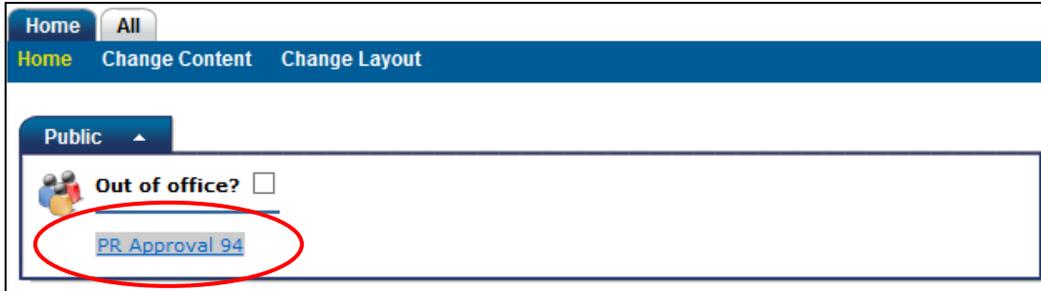
Click on the *Logoff* option.



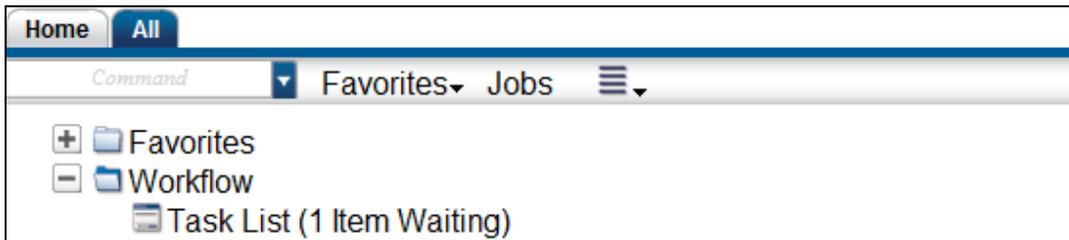
PURCHASING APPROVALS FOR SITES / DEPTS

Navigation

Once signed on, the *Home* page will display a message with a link to outstanding tasks pending approval. Click the link to access the Approval module.



Or, the outstanding tasks may be accessed from the tree on the *All* tab by clicking on **Workflow** and then **Task List**.



Workflow Approval

Site and department administrators with approval capabilities can approve PR's using the links identified above. Once the Workflow option is chosen the following dialogue window will be displayed.

Log Out		Show Group		Set Out Of Office		Help																																																																							
Task List Items Awaiting Processing - ID Assignments																																																																													
Model/Version: PR Approval 94 - 4																																																																													
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PURCHASING APPROVALS FOR SITES / DEPTS

Approve a Completed Purchase Request

After PR's have been reviewed, they can be approved one at a time or all at once as follows:

1. A. To approve a single PR, click the box next to the PR number to be approved
 B. To approve all pending PR's click *All Pending Tasks*
2. Click the green check mark and all PR's selected will be approved

If the PR requires a change or a discrepancy is found, the PR should be rejected and sent back to the originator by clicking the red X.

The screenshot shows a software interface with a top navigation bar (Log Out, Show Group, Set Out Of Office, Help) and a main content area. On the left, a 'Task List Items Awaiting Processing - ID Assignments' section includes a dropdown menu for 'Model/Version: PR Approval 94 - 4'. Below this is a table with columns 'PR', 'PO', 'Vend', and 'Stat'. A row shows '19400184', 'V9402143', and 'PR'. A green checkmark icon is next to the PR number, and a red 'X' icon is next to the PO number. A blue arrow icon is next to the Stat. A red callout '1' points to a checkbox, and a red callout '2' points to the green checkmark icon. A button labeled 'All Pending Tasks' is also visible. On the right, a 'History' table shows user activity with columns 'USER ID', 'WHEN IN', 'NAME', and 'WHEN OUT'. It lists users JXBARN, IGCAVA, and JXBARN with their respective timestamps and actions. Below the history is a 'Summary' section with fields for 'Purchase Request#', 'PR Total\$', 'Requested By', 'Request Date', 'Entry Date', and 'Vendor'. At the bottom, an 'ACCOUNT INFORMATION' table lists item details with columns 'Item#', 'Quantity', 'Price', 'Item Total', 'Lg', 'Key', and 'Object'.

USER ID	WHEN IN	NAME	WHEN OUT
JXBARN	09/24/2014 11:20:36	Jennie Barnes	09/24/2014 11:24:2
IGCAVA	09/26/2014 11:24:28	Imelda G Cavazos	
JXBARN		Future Task Item	To Be Assigned

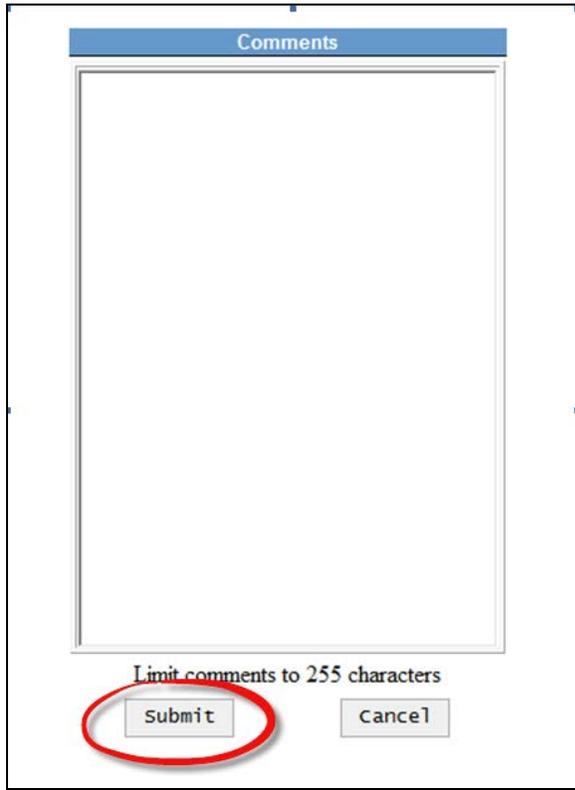
Item#	Quantity	Price	Item Total	Lg	Key	Object
0001	1.000	\$20.00	\$21.60	94	018022	4310

Definitions of the options in the Workflow tab:

- ✓ = Approval/Purchase Request complete
- ✗ = Not approved. The Purchase request will be referred back to creator or previous approver.
- ➡ = Not used by OCDE

PURCHASING APPROVALS FOR SITES / DEPTS

After choosing to approve ✓ or refer the PR back ✗, the approver may provide a comment in the Comments box displayed below. Comments are optional and for internal use only, they will not display on the PR.



The image shows a screenshot of a web application's 'Comments' dialog box. At the top, there is a blue header bar with the word 'Comments' in white. Below the header is a large, empty rectangular text area for entering comments. At the bottom of the dialog, there is a small text label that reads 'Limit comments to 255 characters'. Below this label are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red oval, indicating it is the final step in the process.

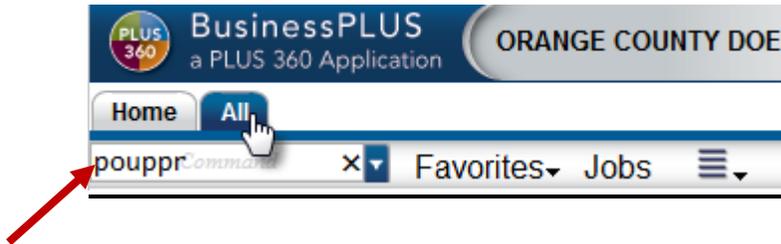
The third and final step to approve or refer the PR back is to click Submit.

PURCHASING APPROVALS FOR SITES / DEPTS

Back up Approval of Purchase Request

When approving PR's as the designated back up, PR's must be accessed from the POUPPR – Purchasing Requests screen.

1. Click on the All tab then type POUPPR to open the Purchase Requests screen.



2. Click on the Workflow link from the sidebar navigation to view items awaiting approval.

The screenshot shows the 'Purchasing - Purchase Requests' screen. The sidebar navigation on the left has a red arrow pointing to the 'Workflow' link. The main content area displays details for a purchase request with PR number J9401281. Below the details is a table of items.

Item Nu	Quantity	Units	Description	Unit Price	PSEUDO ACCOUNT	Extended Amt	Product Code	Brand
0001	1	EA	test	15.0094	011179-4301 ...	16.20		
0002	0			0.0094	-	0.00		

PURCHASING APPROVALS FOR SITES / DEPTS

- Items awaiting direct approval are listed under **Direct Task Items Awaiting ID Approval** (these are the same items visible from the workflow task list previously displayed on this document). Items awaiting an approver for whom you are a back up to are listed under the **Indirect Task Items Awaiting Role Approval**.

The screenshot shows the BusinessPLUS interface for 'Purchasing - Purchase Requests'. The main window displays details for PR: 9401281. The vendor is V9402143 (OFFICE DEPOT INC.) and the status is CA. The date is 03/28/2016. The PR Total is 16.20 and the PO Total is \$0.00. The items table shows two items: 0001 (1 EA, test, 15.0094) and 0002 (0, -, 0.0094).

PR	PO	VEND	STAT
K9400028	J94C0098	V9402143	PR
K9400055		V9402143	PR

GROUP	PR	PO	VEND	STAT
94_BS_2100	K9400056		V9404466	PR
94_BS_2100	K9400057	K94C0001	V9412066	PR

- Click on the PR to be approved under **Indirect Task Items Awaiting Role Approval** to access, review and approve the purchase requisition. Note that once the PR is selected from the left navigation (as identified above) the PR information will be displayed (as identified below)

The screenshot shows the BusinessPLUS interface for 'Purchasing - Purchase Requests'. The main window displays details for PR: K9400057. The vendor is V9412066 (BOOK LAB) and the status is PR. The date is 05/08/2017. The PR Total is 1610.86 and the PO Total is \$1,610.86. The items table shows two items: 0001 (5 EA, ipads, 299.0094) and 0002 (0, -, 0.0094).

USER	WHEN IN	NAME
TLADKI	05/08/17 09:01:30	Teri L Adkins
CWLOMB	05/08/17 09:02:52	OCDE Chris W Lombardo
TBA	Future Task Item	To Be Assigned
BSI	Future Task Item	To Be Assigned
TBA	Future Task Item	To Be Assigned

PR	PO	VEND	STAT
K9400028	J94C0098	V9402143	PR
K9400055		V9402143	PR

GROUP	PR	PO	VEND	STAT
94_BS_2100	K9400056		V9404466	PR
94_BS_2100	K9400057	K94C0001	V9412066	PR

PURCHASING APPROVALS FOR SITES / DEPTS

- To approve the PR displayed on the right, click the green checkmark. If the PR requires a change or a discrepancy is found, the PR should be rejected and sent back to the originator by clicking the red X.

The screenshot shows the BusinessPLUS interface for 'Purchasing - Purchase Requests'. On the left, there is a 'Purchase Document' table with columns for USER, WHEN IN, and NAME. A yellow hand icon points to a green checkmark in the 'Action' column for user CWLOMB. Below this are tables for 'Direct Task Items Awaiting ID Approval' and 'Indirect Task Items Awaiting Role Approval'. On the right, a detailed view of PR K9400057 is shown, including vendor information (V9412066, BOOK LAB), dates (05/08/2017), and a table of items with columns for Item Nu, Quantity, Units, Description, Unit Price, PSEUDO ACCOUNT, and Extended Amt.

USER	WHEN IN	NAME
TLADKI	05/08/17 09:01:30	Teri L Adkins
CWLOMB	05/08/17 09:02:52	OCDE Chris W Lombardo
TBA	Future Task Item	To Be Assigned
BSI	Future Task Item	To Be Assigned
TBA	Future Task Item	To Be Assigned

PR	PO	VEND	STAT
K9400028	J94C0098	V9402143	PR
K9400055		V9402143	PR

GROUP	PR	PO	VEND	STAT
94_BS_2100	K9400056		V9404466	PR
94_BS_2100	K9400057	K94C0001	V9412066	PR

- Once an action has been taken, a comment may be added and the Submit button must be clicked to complete the approval.

This screenshot shows the 'Comments' section of the BusinessPLUS interface. A text area contains the comment: 'CWLOMB out - approved rush order'. Below the text area, there is a 'Limit to 255 Characters' label and two buttons: 'Submit' and 'Cancel'. A yellow hand icon points to the 'Submit' button. The right side of the interface shows the same PR details as the previous screenshot, including the item table.

PURCHASING APPROVALS FOR SITES / DEPTS

Note the name of the backup approver will be captured and displayed along with any comments and the time stamp of their approval.

BusinessPLUS
a PLUS 360 Application
Purchasing - Purchase Requests
Gary M Stine | Settings | 1

Favorites

Links

Workflow

[Refresh](#)

Purchase Document

USER	WHEN IN	NAME	WHEN OUT	GROUP	NOTES
TLADKI ✓	05/08/17 09:01:30	Teri L Adkins	05/08/17 09:02:48		
GMSTIN ✓	05/08/17 09:02:52	Gary M Stine	05/08/17 11:08:29	94 Bus Svcs Mgr 2100	CWLOMB out - approved rush order
KALANG Pending	05/08/17 11:08:35	Kristin A Lange		OCDE Approvers	
BSI	Future Task Item	To Be Assigned			
TBA	Future Task Item	To Be Assigned		OCDE Approvers	

Direct Task Items Awaiting ID Approval

PR	PO	VEND	STAT
K9400028	J94C0098	V9402143	PR
K9400055		V9402143	PR

Indirect Task Items Awaiting Role Approval

GROUP	PR	PO	VEND	STAT
94_BS_2100	K9400056		V9404466	PR

Attachments

PR: K9400057

Vendor: V9412066
BOOK LAB
PO BOX 230206

NEW YORK NY

Item Nu	Quantity	Unit
0001	5	EA
0002	0	

Items Taxes Miscella

Purchase Order Status Inquiry (PO3001)

PO3001 will display purchasing, receiving, encumbrance, and accounts payable information relating to a selected Purchase Request or Purchase Order.

To access the Purchase Order Status Inquiry PO3001 report, click on PO, IQ and then PO3001 within the IQ menu.

Enter the Purchase Order Number to display all information about a Purchase Order/Purchase Request.

- [-] PO - Purchasing
 - + CS - Client-Specific
 - [-] IQ - Interactive Inquiry
 - [-] PO3001 (PO3001: Purchase Order Status Inquiry)
 - + No Criteria; Select All
 - [-] Selection Prompts
 - ? Enter the Purchase Requisition or Purchase Order Number:
 - ? Vendor ID:
 - ? Vendor Name:

PURCHASING APPROVALS FOR SITES / DEPTS

The following is an example of PO3001

ORANGE COUNTY DOE PURCHASE ORDER STATUS INQUIRY

Report Date: 09/24/2014

MASTER INFORMATION

<u>PR Number</u>	<u>PO Number</u>	<u>Vendor ID</u>	<u>Vendor Name</u>	Fully Paid								
I9400177	I94V0055	V9400371	BEST BUY									
Address: PA 25422 EL PASEO STORE #101 MISSION VIEJO, CA 92691			PO Total Amount: 5,400.00									
Confirm:	Requested by: NADINE REYNOSO	Blanket Number:	Req. Dt: 09/22/2014									
Account: NADINE	Approved by: IGCAVA	Blanket Amount:	Apr Dt: 09/22/2014									
Bid:	Printed by: IGCAVA	Blanket Remaining:	Print Dt: 09/22/2014									
Contract:	PO Type: P		Entry Dt: 09/22/2014									
Ship To: S9400083	EN Flag: Y	Req. Codes										
Bill To: P9400001	Sec Cd: 9499	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> </tr> </table>										
End Use:			Buyer B9400019									

ITEMS

Item	Unit Price	Key	Object	Tax1	Discount	Extended	Catalog	F/A	Print
Qty Ordered	UN			Tax2	Charges	Work Order	Ship To	Whse	Chg
FLAT SCREEN TV FOR CLASSROOM									
0001	\$1,000.00	G016439	4410	\$400.00	\$0.00	\$5,400.00		Y	
	5 EA			\$0.00	\$0.00				
***** FIXED ASSET ***** A FIXED ASSET (EQUIPMENT VALUED AT \$500.00 OR MORE, INCLUDING TAX) HAS BEEN ORDERED ON THIS PURCHASE ORDER AND MUST BE TAGGED WITH A FIXED ASSET IDENTIFICATION NUMBER ASSIGNED BY THE PURCHASING DEPARTMENT WHEN YOUR EQUIPMENT IS RECEIVED. THE PURCHASE DEPARTMENT HAS ATTACHED A FIXED ASSET IDENTIFICATION NUMBER TAG TO THE FIXED ASSET ACQUISITION FORM FOR YOU TO USE. PLEASE FOLLOW THE INSTRUCTIONS STATED ON THE FORM FOR RECEIVING YOUR									
0002	\$0.00	G		\$0.00	\$0.00	\$0.00		N	
				\$0.00	\$0.00				
						\$5,400.00			

ENCUMBRANCES

Item #	PR Number	Batch ID	Key	Object	Post Date	EN Amount	PD Amount	Balance	TP
FLAT SCREEN TV FOR CLASSROOM									
0001	I9400177	PO	94 016439	4410	09/22/14	\$5,400.00	\$0.00	\$5,400.00	EN
0001	I9400177	A94B922D	94 016439	4410	09/23/14	\$0.00	\$1,080.00	\$4,320.00	FP
0001	I9400177	A94B922D	94 016439	4410	09/23/14	\$0.00	\$1,080.00	\$3,240.00	FP
0001	I9400177	A94B922D	94 016439	4410	09/23/14	\$0.00	\$1,080.00	\$2,160.00	FP
0001	I9400177	A94B922D	94 016439	4410	09/23/14	\$0.00	\$1,080.00	\$1,080.00	FP
0001	I9400177	A94B922D	94 016439	4410	09/23/14	\$0.00	\$1,080.00	\$0.00	FP
PO Balance:						\$5,400.00	\$5,400.00	\$0.00	

RECEIVING DETAIL

Item #	Date Received	Quantity Received	Quantity Paid	Quantity Damaged	User	Entry Date	Warehouse	Fixed Asset ID
0001	09/22/2014	1.00	0.00	0.00	TXCASA	09/22/2014		F941000048
0001	09/22/2014	1.00	0.00	0.00	TXCASA	09/22/2014		F941000049

User: JXBARN - Jennie Barnes

Page

Current Date: 09/24/2014

PURCHASING APPROVALS FOR SITES / DEPTS

ORANGE COUNTY DOE PURCHASE ORDER STATUS INQUIRY

Report Date: 09/24/2014

MASTER INFORMATION

PR Number	PO Number	Vendor ID	Vendor Name	Fully Paid		
I9400177	I94V0055	V9400371	BEST BUY			
0001	09/22/2014	1.00	0.00	0.00 TXCASA	09/22/2014	F941000052
0001	09/22/2014	1.00	0.00	0.00 TXCASA	09/22/2014	F941000053
0001	09/22/2014	1.00	0.00	0.00 TXCASA	09/22/2014	F941000055
		<u>\$5.00</u>	<u>\$0.00</u>	<u>\$0.00</u>		

OPEN HOLD ACTIVITY

Item #	Sts	Vend.ID	Set ID	Kc	Object	Check #	Check Date	Invoice #	Invoice Date	Amount
0001	WP	V940037	A94B922D	016439	4410			2259	09/16/2014	1,080.00
0001	WP	V940037	A94B922D	016439	4410			2259	09/16/2014	1,080.00
0001	WP	V940037	A94B922D	016439	4410			2259	09/16/2014	1,080.00
0001	WP	V940037	A94B922D	016439	4410			2259	09/16/2014	1,080.00
0001	WP	V940037	A94B922D	016439	4410			2259	09/16/2014	1,080.00
TOTAL AMOUNT CHECK 94 :										<u>\$5,400.00</u>
TOTAL PAYMENTS FOR PO I94V0055:										<u>\$5,400.00</u>

WORKFLOW ACTIVITY

WF Role	Approver	Approved?	Assigned	Responded	Delegatee
	IGCAVA	Accepted	2014/09/22	2014/09/22 13:30:48	
9499_OCDE_PUR	IGCAVA	Accepted	2014/09/22	2014/09/22 13:30:53	

Notes: ID IGCAVA already approved transaction in activity A21

PURCHASING APPROVALS FOR SITES / DEPTS

NOTES: