

2020

HOW TO APPROVE PURCHASE REQUISITIONS

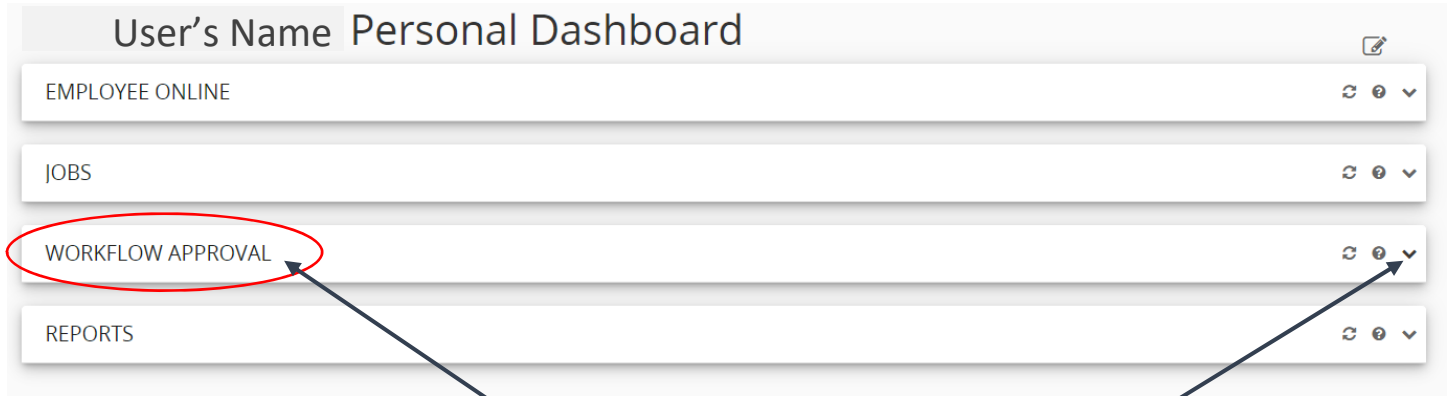
MANUAL


BUSINESS SOFTWARE HELPDESK

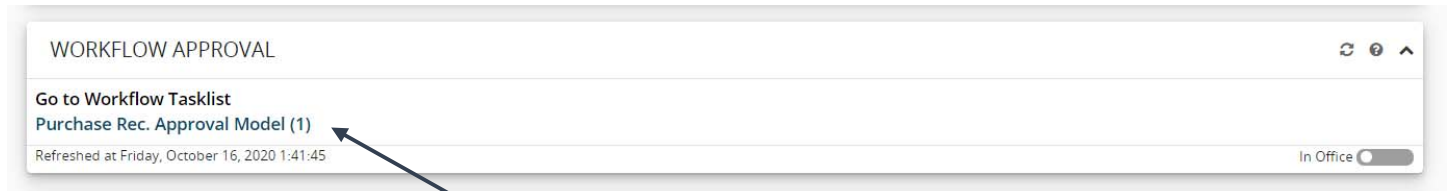
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Step 1: Access Workflow Tasklist



Select:  on the **WORKFLOW APPROVAL** component.



Click: **Purchase Rec. Approval Model (1)**

Workflow Tasks screen will populate.

BusinessPlus Workflow Tasks

Your Tasks ▾ Choose ▾ Expand Records ▾ Select and process all tasks In Office

Click: ▾ drop down.

Your Tasks ▾ Choose ▾ Expand Records ▾ Select and process all tasks In Office

Your Tasks
Group Tasks

Select: Your Tasks

Your Tasks ▾ Choose ▾ Expand Records ▾ Select and process all tasks In Office

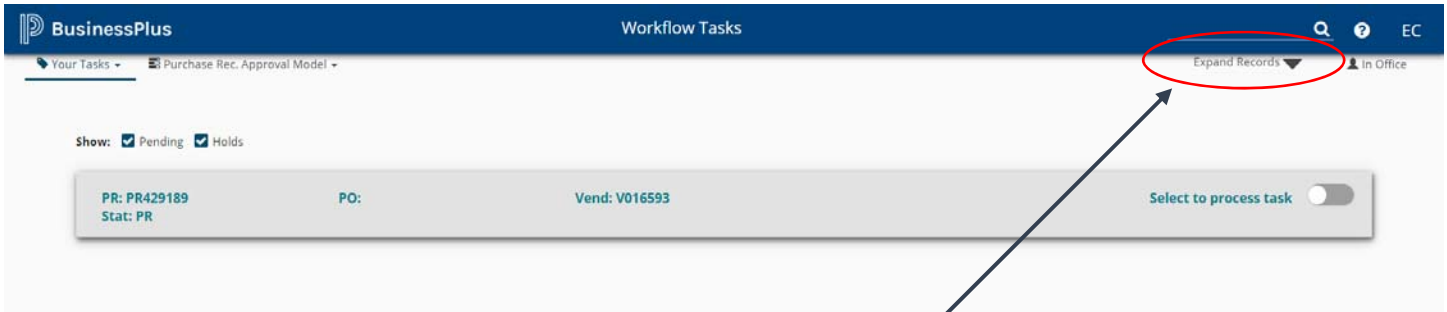
Click: ▾ drop down.

Your Tasks ▾ Choose ▾ Expand Records ▾ Select and process all tasks In Office

Model	ID
Purchase Rec. Approval Model	PR_APRV

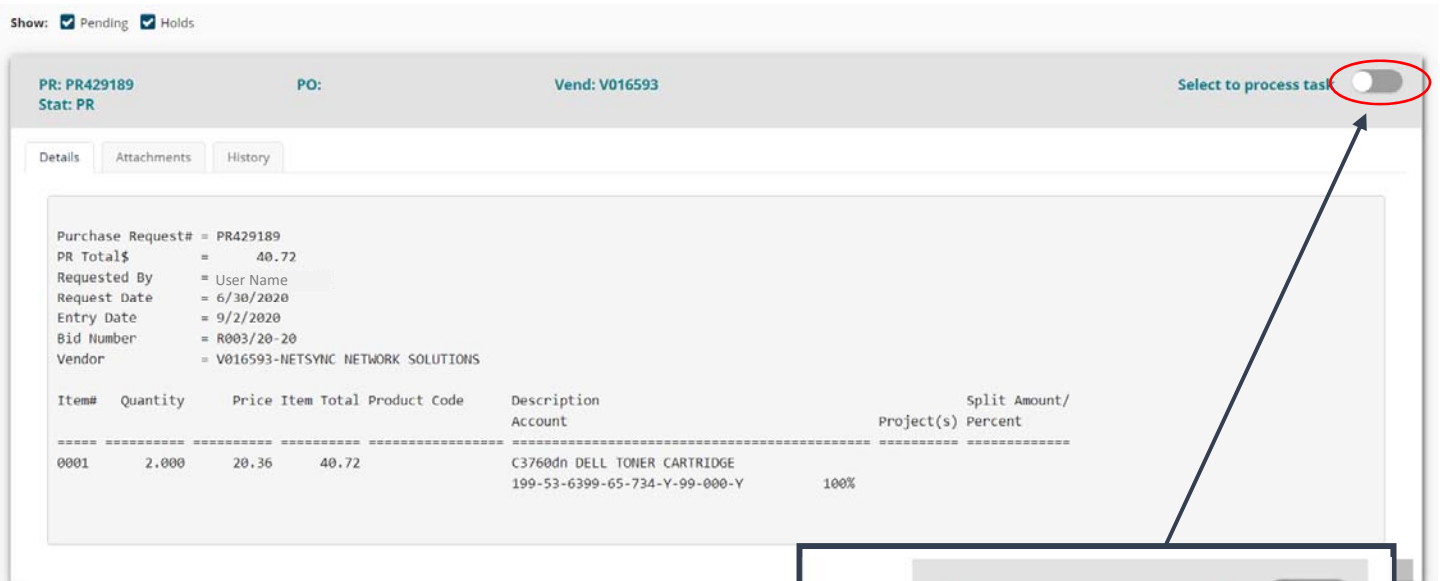
Select: Purchase Rec. Approval Model

A list of pending PRs will populate.



For PR details Click:
Expand Records ▼

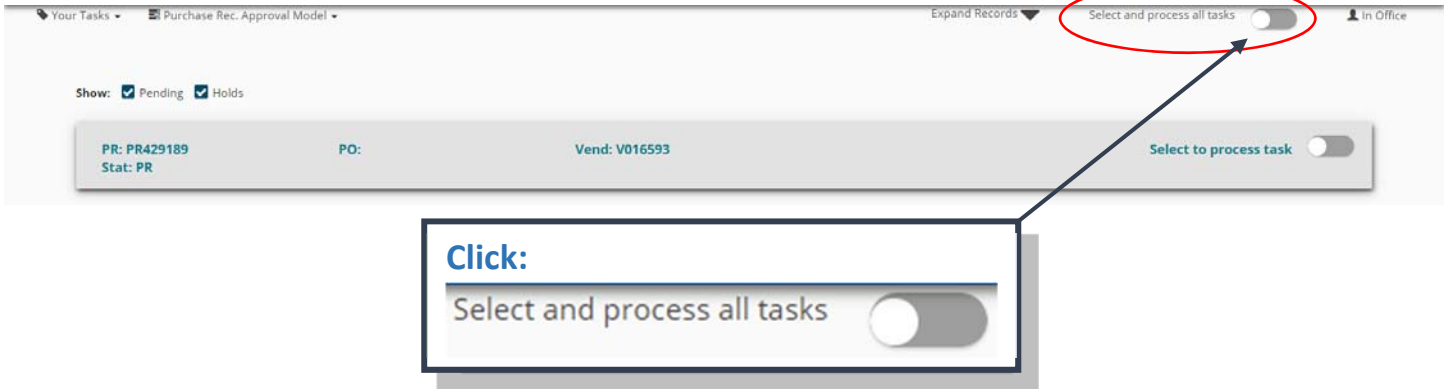
PR details are displayed.



Click: Select to process task

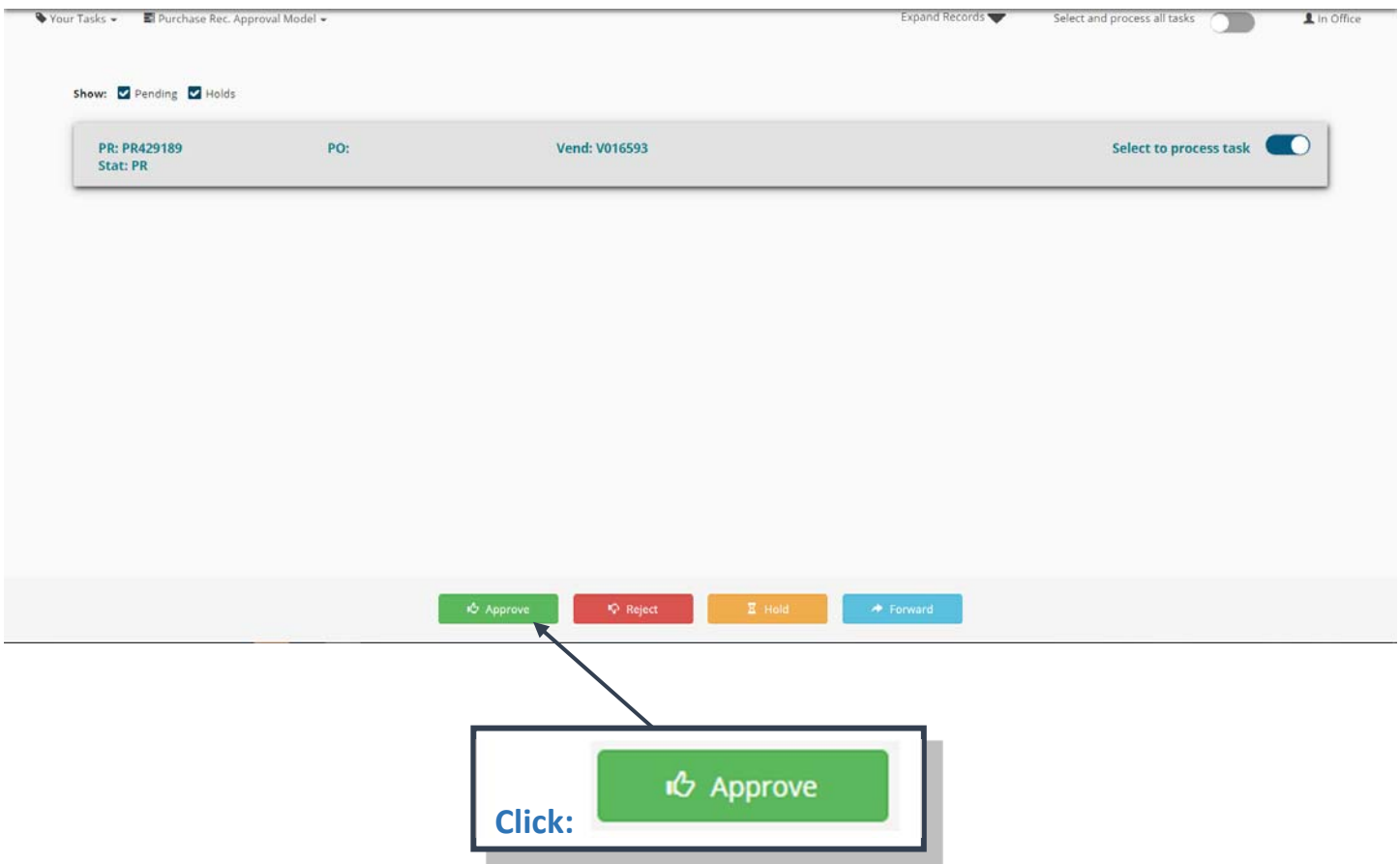
to approve the PR.

Note: *If approving multiple PRs at once; follow the next step, if not, skip to Step 2.*



Step 2: Approve Purchase Requisition

Note: Example of Collapsed View.



Note: Example of Expanded View.

show: Pending Holds

PR: PR429189 PO: Vend: V016593 Select to process task

Stat: PR

Details Attachments History

Purchase Request# = PR429189
 PR Total\$ = 40.72
 Requested By = Erika Cisneros
 Request Date = 6/30/2020
 Entry Date = 9/2/2020
 Bid Number = R003/20-20
 Vendor = V016593-NETSYNC NETWORK SOLUTIONS

Item#	Quantity	Price	Item Total	Product Code	Description Account	Split Amount/ Project(s) Percent
0001	2.000	20.36	40.72		C3760dn DELL TONER CARTRIDGE 199-53-6399-65-734-Y-99-000-Y	100%

Click:

Comments Screen will open. Field is available for any comments and/or funding source notes or for originator if order is being rejected.

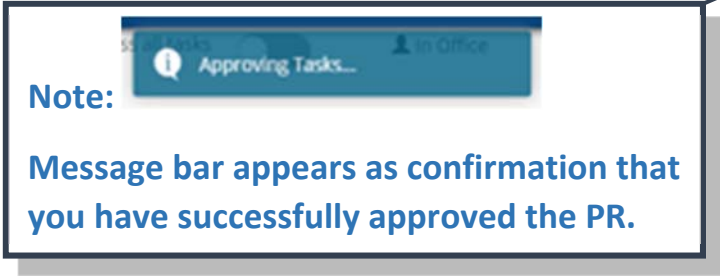
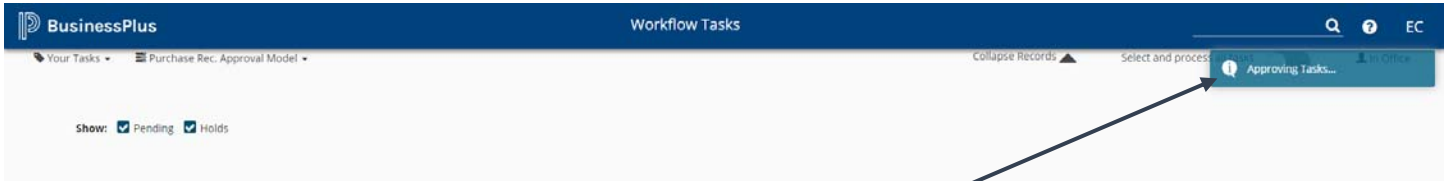
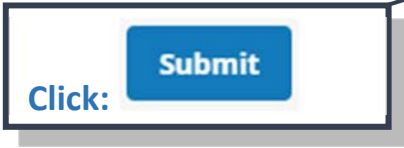
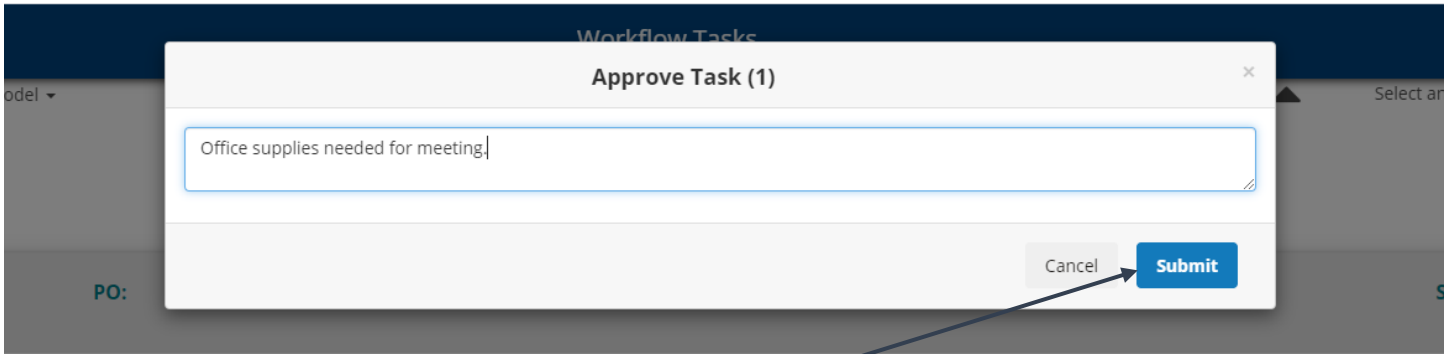
Workflow Tasks

Approve Task (1)

Office supplies needed for meeting

Cancel Submit

NOTE: DO NOT USE SPECIAL CHARACTERS! SUCH AS: #, &, \$, @, *, % etc...PR WILL NOT GO THRU!



The PR will now move through the Workflow to the next approver in accordance to Workflow Module.