

2021

CREATING PURCHASE REQUISITIONS

MANUAL

BUSINESS SOFTWARE HELPDESK

BROWNSVILLE ISD | 1900 PRICE RD BROWNSVILLE TX -78521-

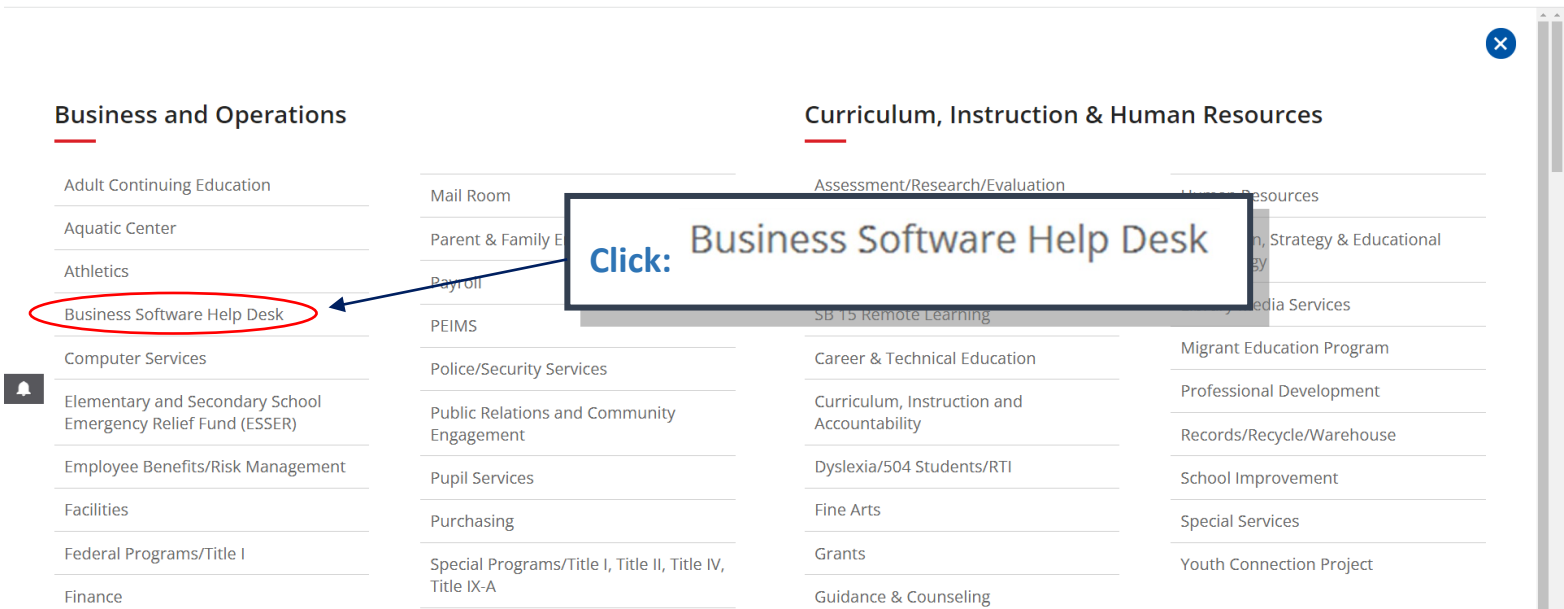
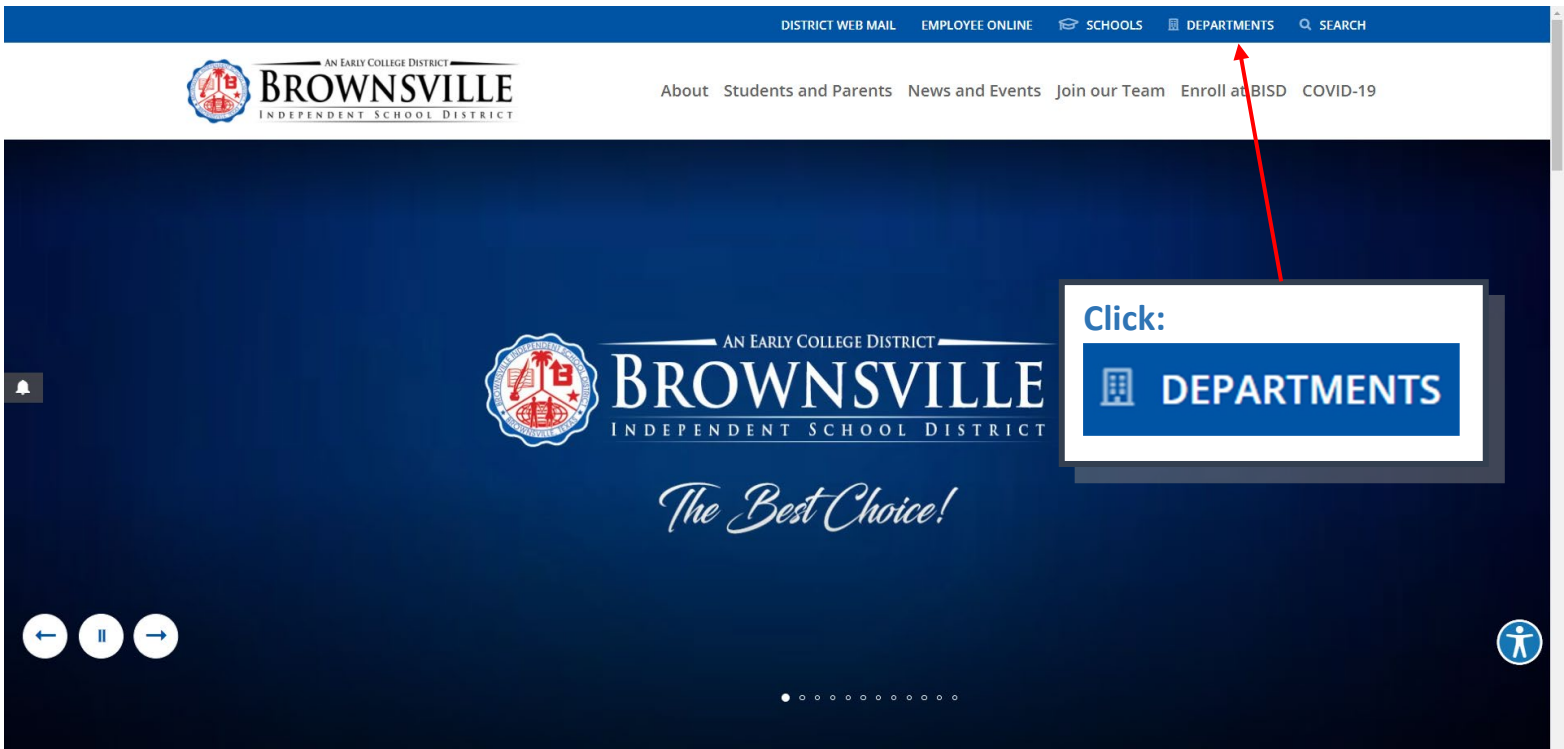


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Step 1: Log in to system.

****Note:** Access the link through the Business Software Help Desk website using the Google Chrome  browser.



You will be redirected to the Business Software Help Desk Website.



In This Section

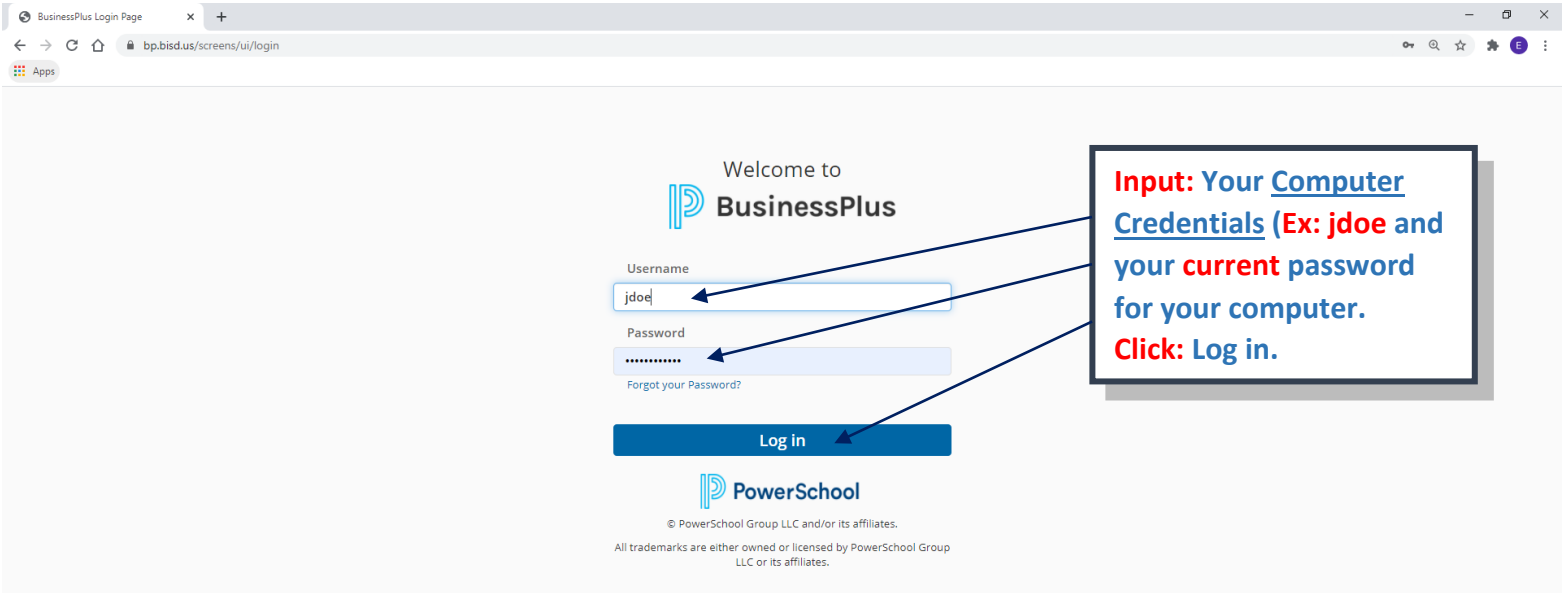
- Home Page
- Documents
- FAQ
- Staff

Business Software Help Desk



The mission of the Business Software Helpdesk is to provide expertise in establishing, maintaining and coordinating the necessary procedures required for the accurate functioning of the District's HR/Payroll/Financial Management Software Applications (BusinessPLUS) on a manner consistent with Board Policy and statutes and standards of regulatory agencies.

[BusinessPLUS Login Page](#)



You are now logged in to the BusinessPLUS Software.

Click: **Menu** for full Menu Tree Options.

Note: Personal Dashboard will display for your favorite shortcuts.

Note: Menu will display. Scroll up/down for a complete menu of options.

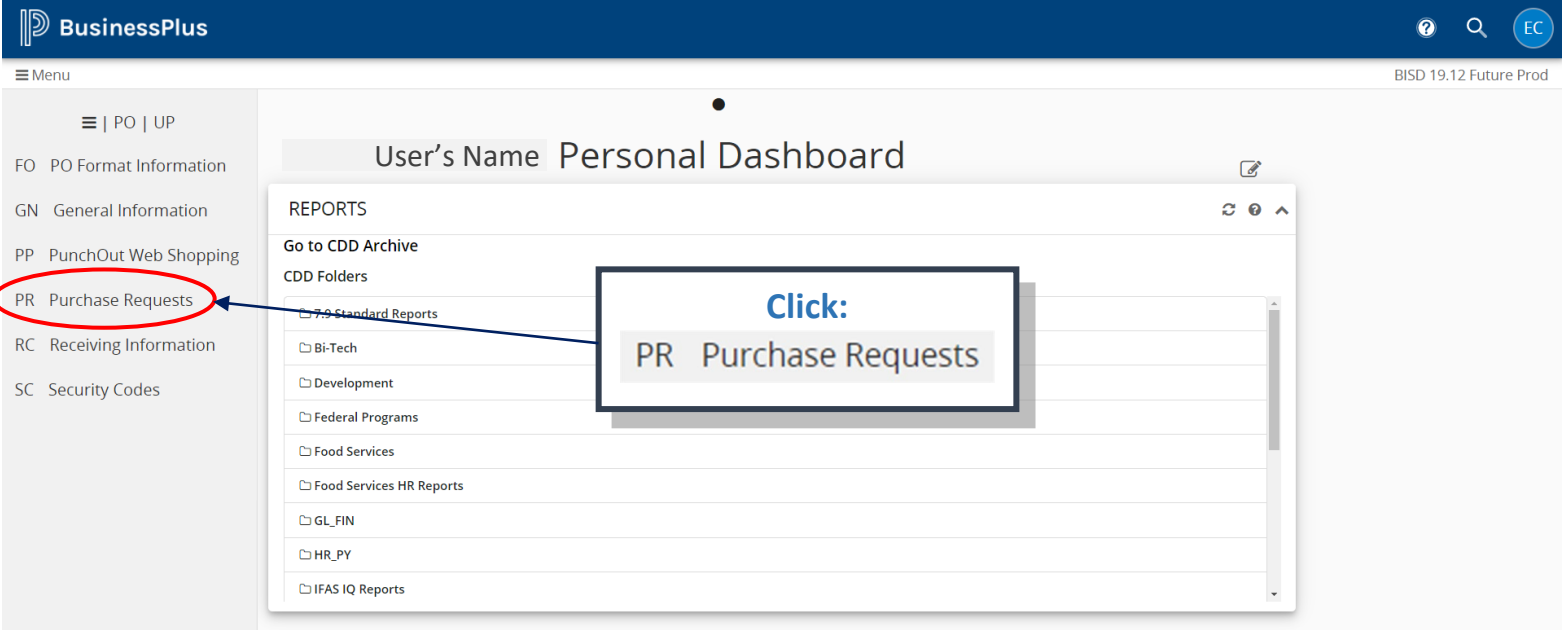
Step 2: Access the Purchase Requisition Screen.

****NOTE:** There are **two** options for accessing the Purchase Requisition Screen.

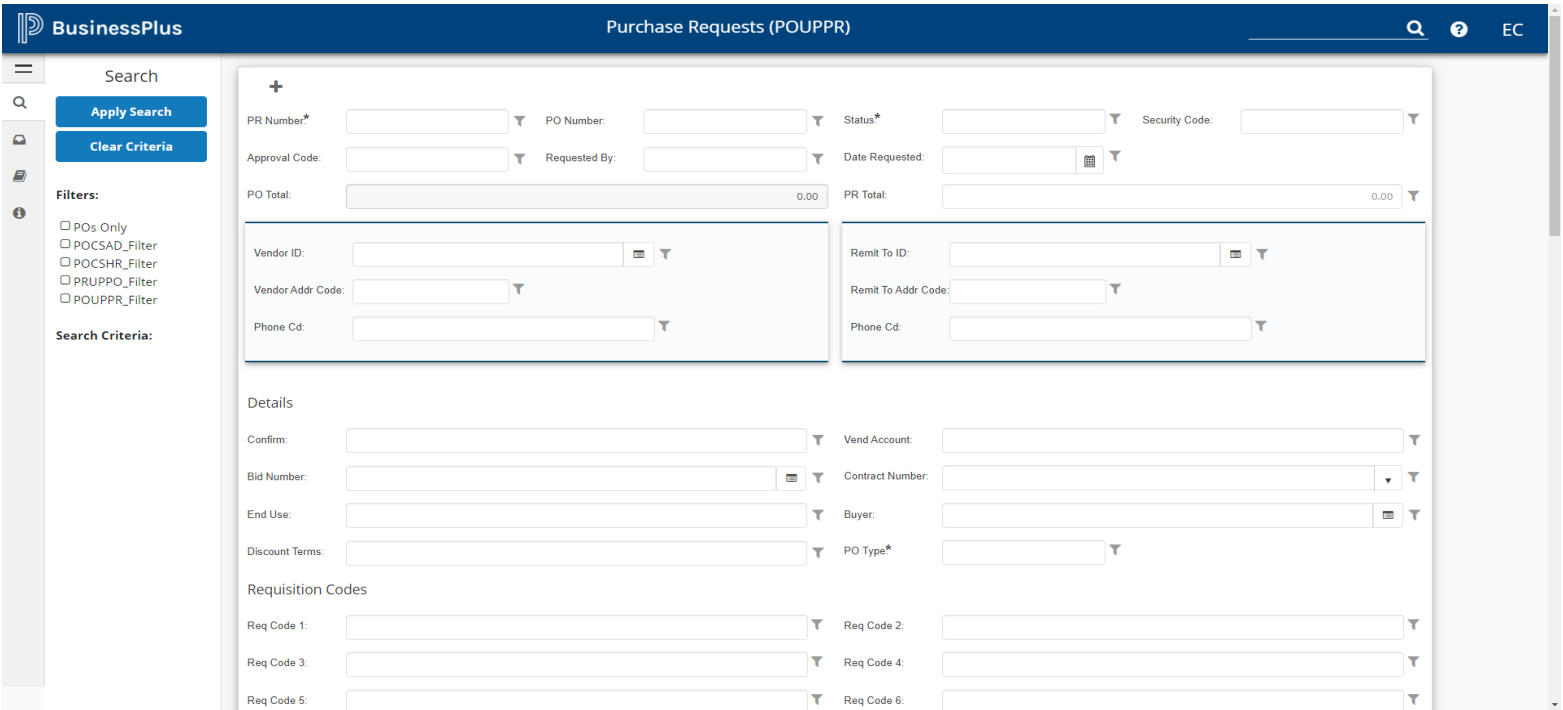
1st Option below.

The screenshot shows the BusinessPlus interface. On the left is a 'Complete Menu' with various options. 'PO Purchasing' is circled in red. On the right is a 'User's Name Personal Dashboard' with a 'REPORTS' section. Under 'Go to CDD Archive', there is a 'CDD Folders' list. A callout box points to 'PO Purchasing' in this list with the text 'Click: PO Purchasing'.

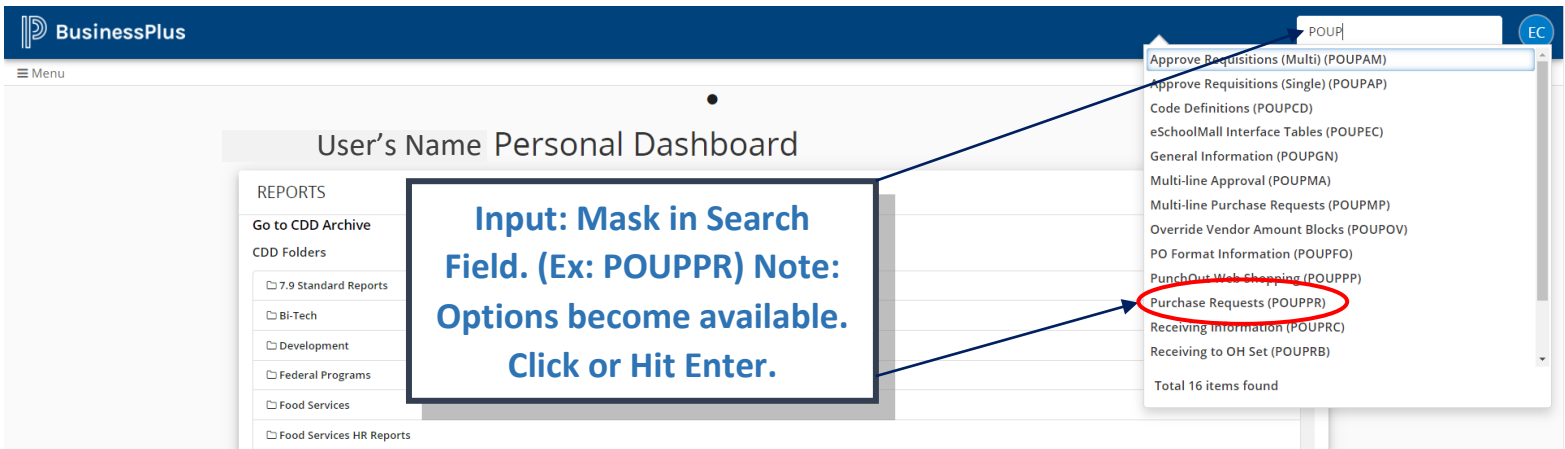
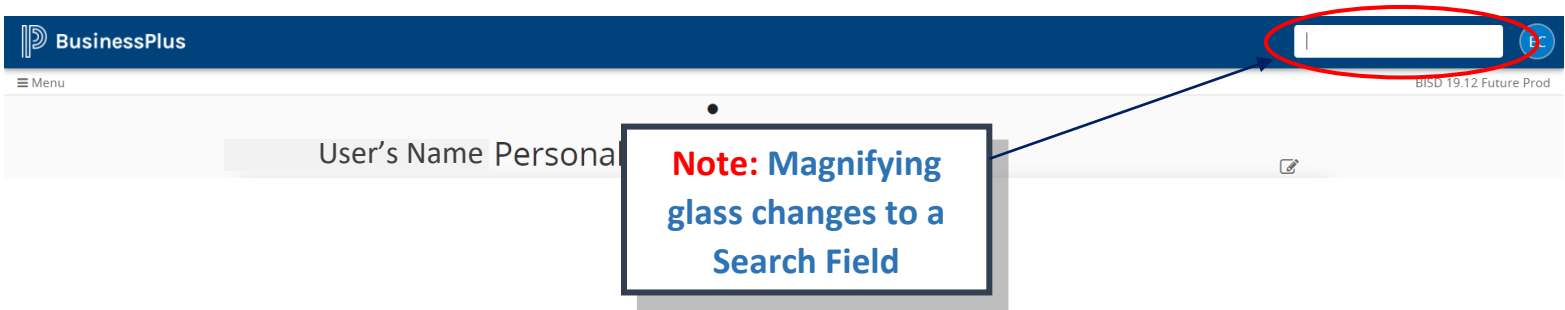
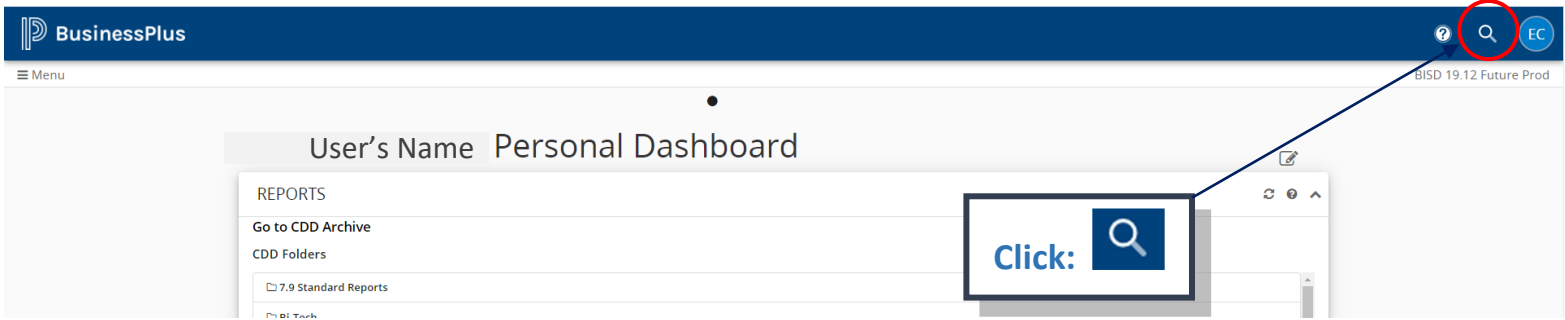
The screenshot shows the BusinessPlus interface. On the left is a 'Menu' with various options. 'UP Update Database' is circled in red. On the right is a 'User's Name Personal Dashboard' with a 'REPORTS' section. Under 'Go to CDD Archive', there is a 'CDD Folders' list. A callout box points to 'UP Update Database' in this list with the text 'Click: UP Update Database'.



Purchase Requests (POUPPR) Screen will populate. (To skip example of Option 2 go to page 7 to proceed.)



2nd Option is as follows.



Purchase Requests (POUPPR) Screen will populate.

Step 3: Add Purchase Requisition.

****You are now ready to create Purchase Requisition follow the next steps.**

Screen will then change to "Add" mode. See next page.

Next: A PR number needs to be created; proceed to the following steps.

BusinessPlus Purchase Requests (POUPPR)

PR Number*: PO Number: Status*: PR Security Code:

Approval Code: Requested By: Requested: 09/29/2020

PO Total: 0.00

Click:

BusinessPlus Purchase Requests (POUPPR)

PR Number*: PR.SEED PO Number: Status*: PR Security Code:

Approval Code: Requested By: Date Requested: 09/28/2020

PO Total: 0.00 PR Total: 0.00

Vendor ID:

Vendor Addr Code:

Phone Cd:

Click: PR# will automatically generate.

Note: A PR number has been generated.

BusinessPlus Purchase Requests (POUPPR)

PR Number*: PR429197 PO Number: Status*: PR Security Code:

Approval Code: Requested By: Date Requested: 09/28/2020

PO Total: 0.00 PR Total: 0.00

Step 4: Input Sec Cd. (Security Code)

NOTE: "Sec Cd" will be the campus/location creating PR.

The screenshot shows the BusinessPlus interface for creating Purchase Requests (POUPPR). The form includes fields for PR Number (PR429197), PO Number, Status (PR), Security Code (734), Approval Code, Requested By, PO Total, Vendor ID, Remit To ID, Vendor Addr Code, and Remit To Addr Code. A callout box with the text "Click: Drop down arrow. Select: Campus/location" points to the Security Code dropdown menu. The dropdown menu is open, showing a search bar with "734" and a table with the following data:

Code	Description
734	Bi-tech Help Desk

Step 5: Input Vendor ID

****You are now ready to enter the Vendor information.**

The screenshot shows the Vendor information section of the BusinessPlus form. It includes fields for Vendor ID, Vendor Addr Code, and Phone Cd. A callout box with the text "Click:" points to a data lookup icon (a small grid icon) located next to the Vendor ID field.

The Data Lookup Screen will populate. See next screen.

Data Lookup

Search ID Source: Person/Entity ▼

PE ID	Name	Security CD	Pedb Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

No items to display

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City

**Type in Vendor Name
in the blank box.**

Example provided is for Sam's Club.

Data Lookup

PE ID	Name	Security CD	Pedb Code
<input type="text"/>	<input type="text" value="Sam's Club"/>	<input type="text"/>	<input type="text"/>
V008406	SAM TELL & SON INC.		P
V001639	SAM'S CLUB		P
138304	SAMANDI, ROSARIO E		
350568	SAMANIEGO, MICHAEL		
V019417	SAMANIEGO, OMAR		
019313	SAMANO, BEATRICE		P

1 - 26 of 26 items

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City
P1	3570 W. ALTON G...				BROWNSVILLE
P2	1400 E. JACKSON				MCALLEN
P3	621 N. 77 SUNSHI...				HARLINGEN

Buttons: Add, Close, Ok

Notice: it generates a list.
Select: the desired vendor and address below.
Click:

Vendor ID:

SAM'S CLUB

Vendor Addr Code:

3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526

Phone Cd: 9563506917

Remit To ID:

Remit To Addr:

Phone Cd:

Vendor Information is now displayed.

NOTE: For a list of awarded vendors, refer to the Purchasing website or call them directly. **ONLY** awarded vendors may be used.

Step 6: Input Details Information.

**Information required depends on vendor; example used below is for Sam's Club.*

Input Vendor Bid # or Resolution # or Board Approved date. If none; specify type of purchase, such as: TRAVEL, REIMBURSEMENT, MEALS, etc...

Specify whether Fund is FEDERAL, STATE or LOCAL.

Input: Cooperative Contract # (ex: DIR-SDD-1951) found on quote, or BID expiration date. Or if PR is for TRAVEL; input the Travel Id# from WebTravel. If none; input "N/A"

NOTE: All three fields need to be filled in with correct information, to avoid system error and/or PR rejections causing delays.

Ship To and Bill To information defaults automatically.

NOTE: "Ship To" address can ONLY be changed if items are to be shipped directly to the ordering entity. You may check with Purchasing Dpt. to verify.

Step 7: Input requested items.

Items Notes

Item Number: 0001 Vendor Item No: Product Code: Quantity: 0.00

Units: Unit Price: 0.00 Extended Amt: 0.00 Catalog Number:

Item Description

+ Add Account Switch to: Amount Total: 100.00% Remaining: 0.00%

Items Notes

Item Number: 0001 Vendor Item No: Product Code: Quantity: 2.00

Units: EA Unit Price: 8.98 Extended Amt: 17.96 Catalog Number:

Item Description

Click on drop down arrow and Select a type of unit. (ex. "EA")

Input the quantity and the unit price.

Next, Input the item description, provide model/part# if applicable.

***Note:** Do not copy/paste information from vendor websites. Information must be manually entered. See example below.

Item Description

Folgers Dark Roast Coffee.

+ Add Account Switch to: Amount

Total: 100.00% Remaining: 0.00%

You may now proceed to input a valid Account#. Questions regarding acct #'s; contact the Finance/Budget Dpt. @ (956)548-8311.

****NOTE: DO NOT click on** + Add Account
To be used for account splits ONLY!

+ Add Account Switch to: Amount

Total: 100.00% Remaining: 0.00%

Account										Percent	
GL	199	53	6399	00	734	Y	99	000	WORK ORDER	100.00	Delete

Pct Discount: 0.00 Discount: 0.00 Charge Code: Charge Amt: 0.00

Tax Code: Tax Amt: 0.00 Tax Code 2: Tax Amt 2: 0.00

Input: account #
Hit: Enter

BusinessPlus Purchase Requests (POUPPR) EC

Record(s) Accepted

Add

Note: The following message bar will appear.

You may now proceed to enter any additional items.

Items Notes

Item Number: 002 Vendor Item No: Product Code: Quantity: 0.00

Units: Unit Price: 0.00 Extended Amt: 0.00 Catalog Number:

Item Description

Note: Item number will default to next line item. Fill in the required fields as previous item.

+ Add Account Switch to: Amount Total: 100.00% Remaining: 0.00%

Account											Percent	
GL	199	53	6399	00	734	Y	99	000	Y	WORK ORDER	100.00	Delete

Hit **ENTER** key after each additional line item.

Step 8: Input "Notes" to PR.

****Note:** There are two sections that require notes.

1st Notes Section-PR Notes

Currency: Text File:

Items Notes

Item Number: 0001 Vendor Item No: Product Code: Quantity: 2.00

Units: EA Unit Price: 8.98 Extended Amt: 17.96 Catalog Number:

Item Description

Folgers Dark Roast Coffee.

Select "Notes" Tab.

+ Add Account Switch to: Amount Total: 100.00% Remaining: 0.00%

Account											Percent	
GL	199	53	6399	00	734	Y	99	000	Y	WORK ORDER	100.00	Delete

Other Information

Approved By: Date Approved: Printed By: Date Printed:

Encumber PO?: EN Division: Print Format: Category Code:

Currency: Text File:

Items Notes

PR Notes Print Before Print After

The following Tabs are available for any notes/comments required by the Funding Source.

Hit **Enter** to save your entry. If No notes are needed continue to Step 9.

BusinessPlus Purchase Requests (POUPPR)

3760 ROBINDALE RD.
***DELIVERY HRS: 7:30am to 3:30pm ***
BROWNSVILLE, TX 78526
Phone Cd:

1900 E. PRICE RD, RM. 303
BROWNSVILLE, TX 78521
Phone Cd:

Record(s) Accepted

Other Information

Approved By: Date Approved: Printed By: Date Printed:

Encumber PO?: EN Division: Print Format: Category Code:

Currency: Text File:

Items Notes

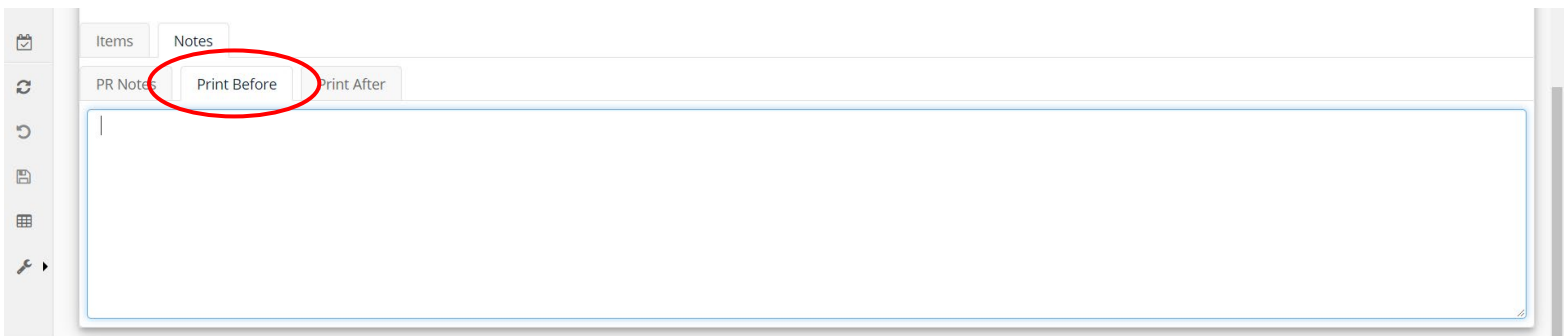
PR Notes Print Before Print After

Test

Note: bar will populate saving your entries.

****Required (PR Notes) Information:**

- 1) If ordering vehicle parts; indicate vehicle #, repair order#, bin # (if an inventory item) and storage location.
- 2) Repairs; indicate location and work order#.
- 3) Contracted services; indicate Board Approval date and contract amount.

2nd Notes Section-Print Before

The screenshot shows a software interface with a sidebar on the left containing various icons. The main area has a tabbed interface with 'Items' and 'Notes' tabs. Under the 'Notes' tab, there are three sub-tabs: 'PR Notes', 'Print Before', and 'Print After'. The 'Print Before' tab is circled in red. Below the tabs is a large, empty text input area.

****NOTE:** All PRs must have the required information listed below. Contact Purchasing for any questions or concerns @ (956)548-8361

****Required (Print Before Notes), if ordering from the following vendors:**

- 1) DIR = Contract# & customer agreement #.
- 2) Dell = Quote# & DIR customer agreement #.
- 3) SHI = DIR contract# & customer agreement #.
- 4) Calence = DIR contract#.
- 5) US Tech = DIR contact# & customer agreement #.
- 6) TCPN = Contract#.
- 7) Buyboard = Contract#.
- 8) Awarded Bids/Proposals/Qualifications = Bid# & item#.

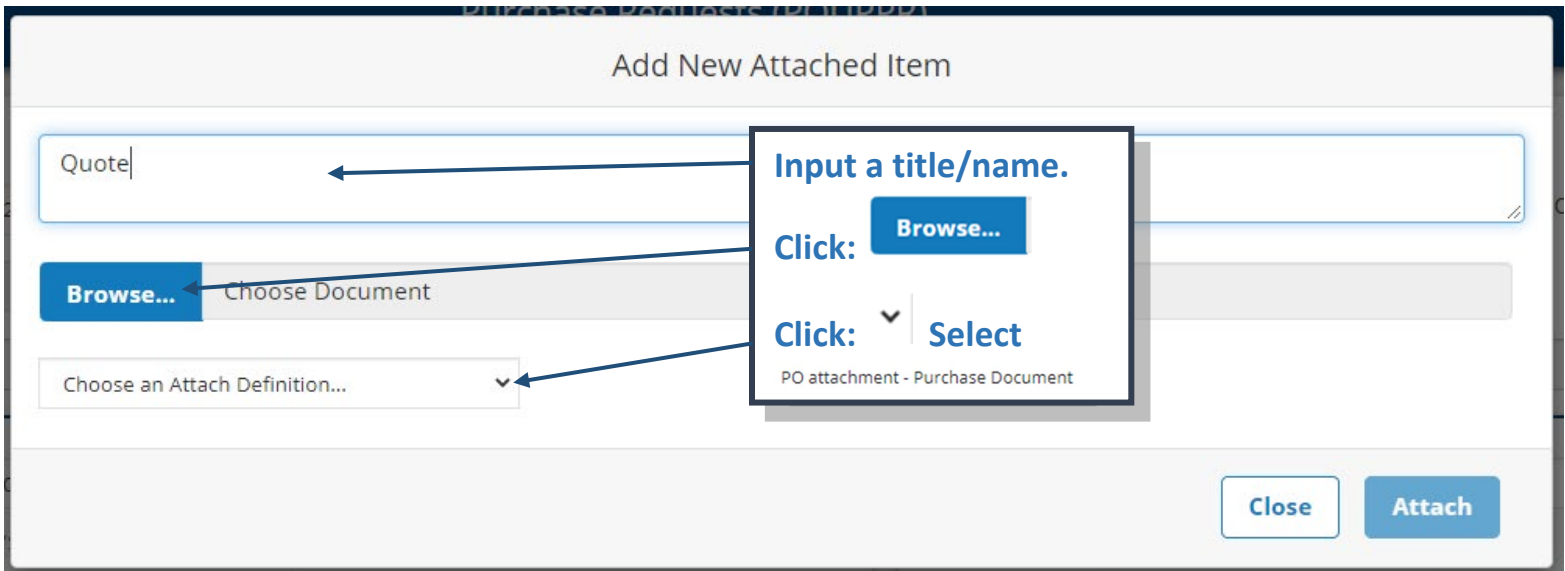
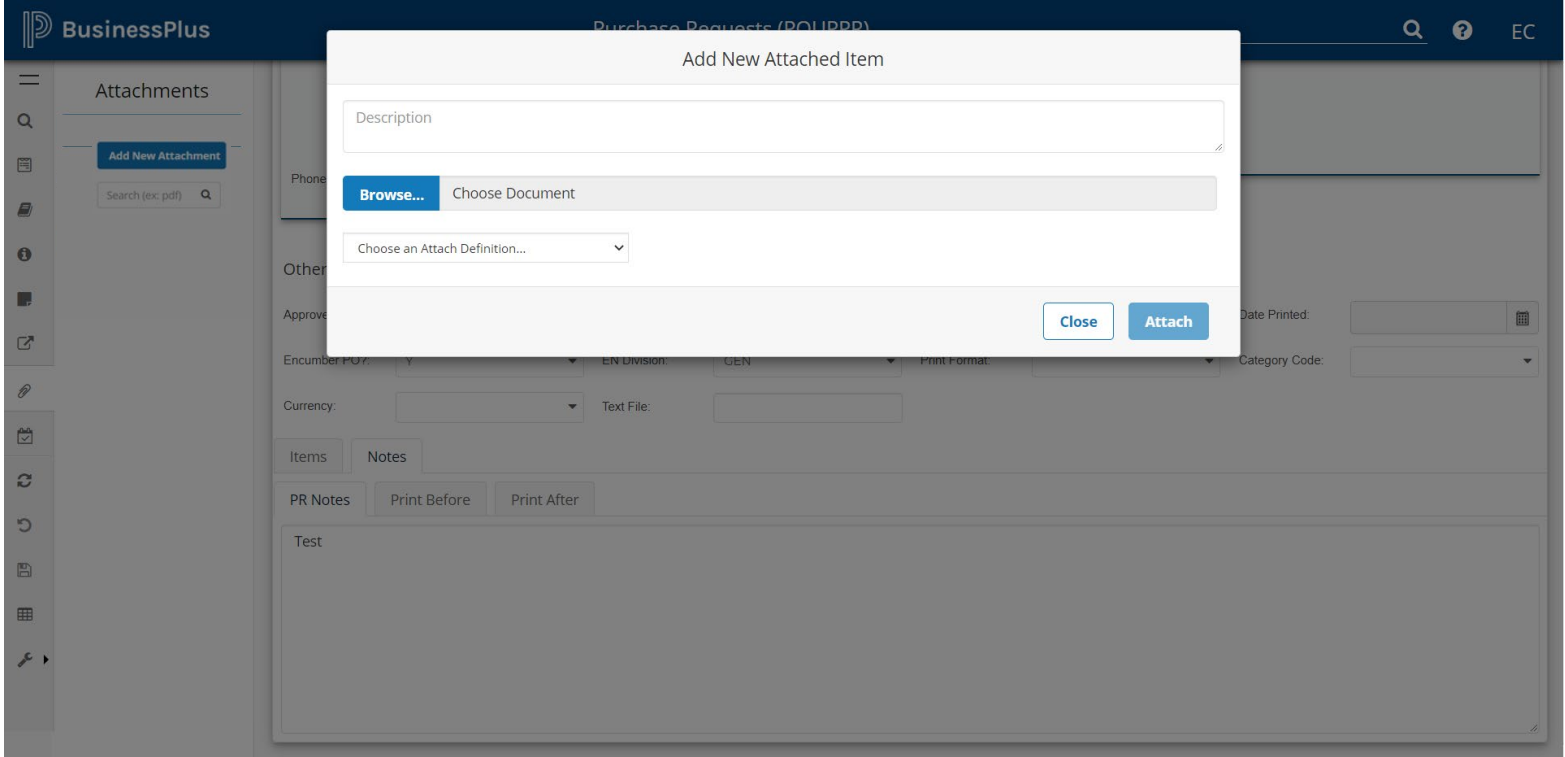
Step 9: Adding Attachments

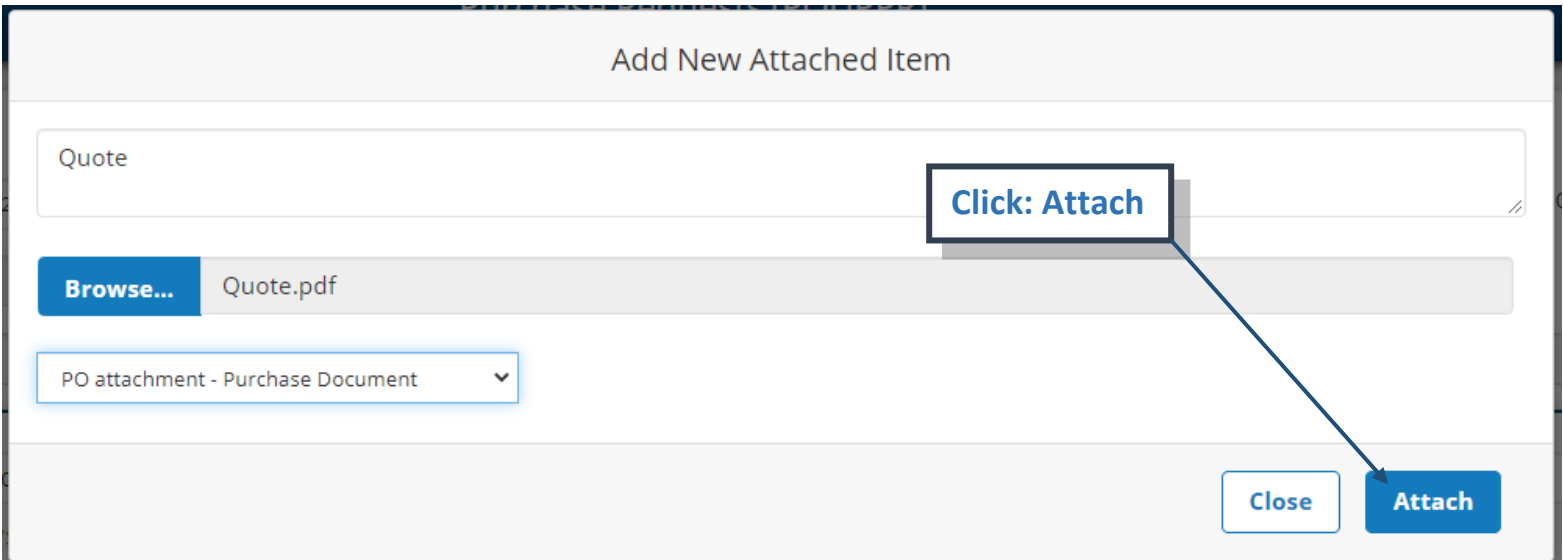
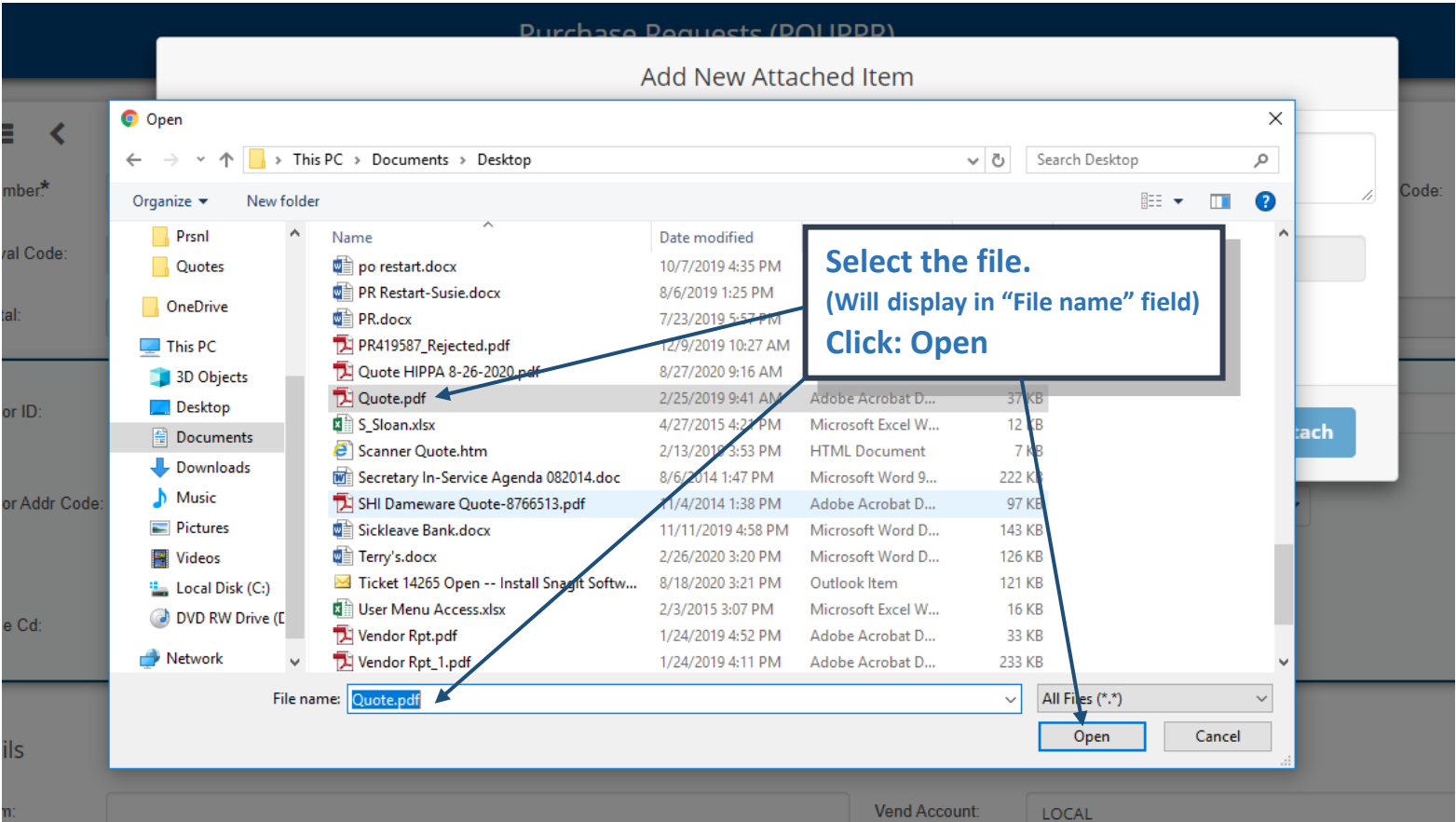
The screenshot shows the BusinessPlus interface for creating a purchase requisition. The top navigation bar includes the BusinessPlus logo, the title "Purchase Requests (POUPPR)", and search, help, and user icons. The main form contains fields for PR Number (PR429197), PO Number, Approval Code, Requested By, PO Total (41.88), Security Code (734), Vendor ID (V001639), Vendor Name (SAM'S CLUB), Vendor Address (3570 W. ALTON GLOOR BLVD., BROWNSVILLE, TX 78526), and Phone Cd (9563506917). A callout box with a paperclip icon and the text "Click: [paperclip icon] for Attachments (ex: vendor quotes)" points to a small paperclip icon in the Vendor ID field. A red circle highlights the paperclip icon in the left-hand navigation menu.

The screenshot shows the "Attachments" section of the BusinessPlus interface. The left sidebar has a "Purchase Doc..." dropdown and a blue "Add New Attachment" button. Below it is a search bar with the text "Search (ex: pdf)". The main form area shows the same purchase requisition details as the previous screenshot. A callout box with the text "Click: [Add New Attachment button]" points to the "Add New Attachment" button in the sidebar.

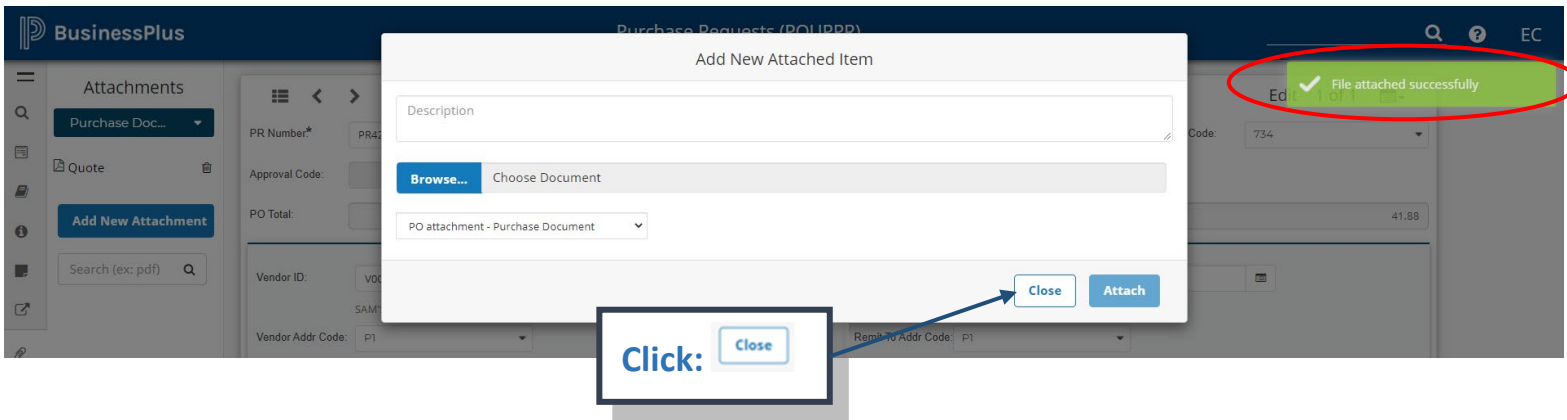
****NOTE:** Document to be attached should be saved in your files prior to attempting to attach.

Attachment Dialogue Box will display.

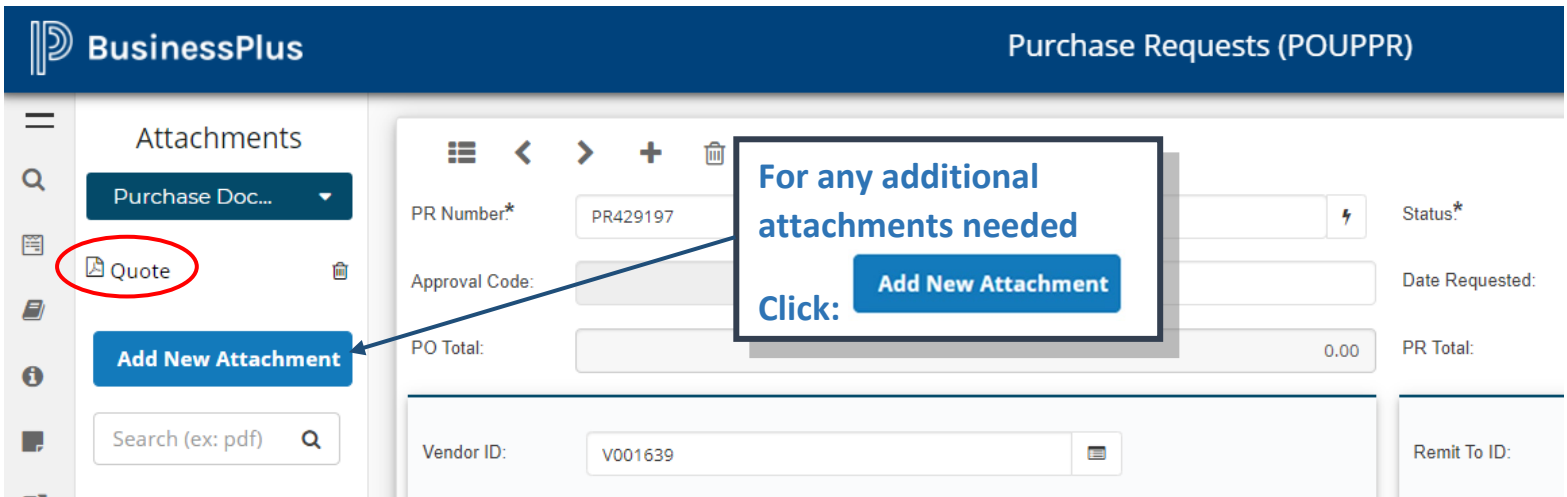




Message bar  will populate.



File has been uploaded/attached. Click on file name to open document.



****NOTE:** Verify all information; once complete, you may proceed to approving the PR.

Step 10: Approving PR

Attachments

Purchase Doc...
Quote
Add New Attachment
Search (ex: pdf)

PR Number*: PR429197 PO Number: Status*: PR Security Code: 734
Approval Code: Requested By: User Name Date Requested: 06/30/2020
PO Total: 0.00 PR Total: 41.88

Vendor ID: V001639
SAM'S CLUB
Vendor Addr Code: P1
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd: OF 9563506917

Remit To ID: V001639
SAM'S CLUB
Remit To Addr Code: P1
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd:

Details

Confirm: Vend Account: LOCAL
Bid Number: 20-002 Contract Number: N/A
End Use: Buyer:
Discount Terms: PO Type*: P

Click: Pending Tasks

Approvals

Direct Task It...
Direct Task Items Awaiting ID Approval
User ID: B1734ECC
Role ID:
Document: PR:PR429189-PO-~
Vend:V016593-Stat:PR

PR Number*: PR429197 PO Number: Status*: PR Security Code: 734
Approval Code: Requested By: User Name Date Requested: 06/30/2020
PO Total: 0.00 PR Total: 41.88

Vendor ID: V001639
SAM'S CLUB
Remit To ID: V001639
SAM'S CLUB

Click: Direct Task It... Drop down

Approvals

Direct Task It...
Direct Task Items Awaiting ID Approval
Purchase Document
Role ID:
Document: PR:PR429189-PO-~
Vend:V016593-Stat:PR

PR Number*: PR429197 PO Number: Status*: PR Security Code: 734
Approval Code: Requested By: User Name Date Requested: 06/30/2020
PO Total: 0.00 PR Total: 41.88

Vendor ID: V001639
SAM'S CLUB
Remit To ID: V001639
SAM'S CLUB

Select: Purchase Document

Approvals field will expand.

PR Number*: PR429197 PO Number: Status*: PR Security Code: 734
Approval Code: Requested By: User Name Date Requested: 06/30/2020
PO Total: 0.00 PR Total: 41.88

Vendor ID: V001639 Vendor Addr Code: P1
SAM'S CLUB
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd:

Remit To ID: V001639 Remit To Addr Code: P1
SAM'S CLUB
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd:

Details
Confirm: Vend Account: LOCAL
Bid Number: 20-002 Contract Number: N/A
End Use: Buyer:
Discount Terms: PO Type*: P

Requisition Codes
Req Code 1: Req Code 2:

Approvals sidebar:
Purchase Doc...
Pending B1734ECC
Group: Since: 09/28/20 09:50:56 On: 12/31/50 00:00:00
Future Group: WF Dept 734
Future Group: WF AS CFO
Future Group: WF Fixed Asset
Future Group: WF Purchasing Verification
Future Group: WF Buyer 02
Future Group: WF Purchasing Agent
Link to Task List
Approve
Reject
Hold
Forward

****Reminder: Make sure Purchase Requisition is correct prior to approving!**

Click Approve to approve and submit to the Workflow.

PR Number*: PR429197 PO Number: Status*: PR Security Code: 734
Approval Code: Requested By: User Name Date Requested: 06/30/2020
PO Total: 0.00 PR Total: 41.88

Vendor ID: V001639 Vendor Addr Code: P1
SAM'S CLUB
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd: OF 9563506917

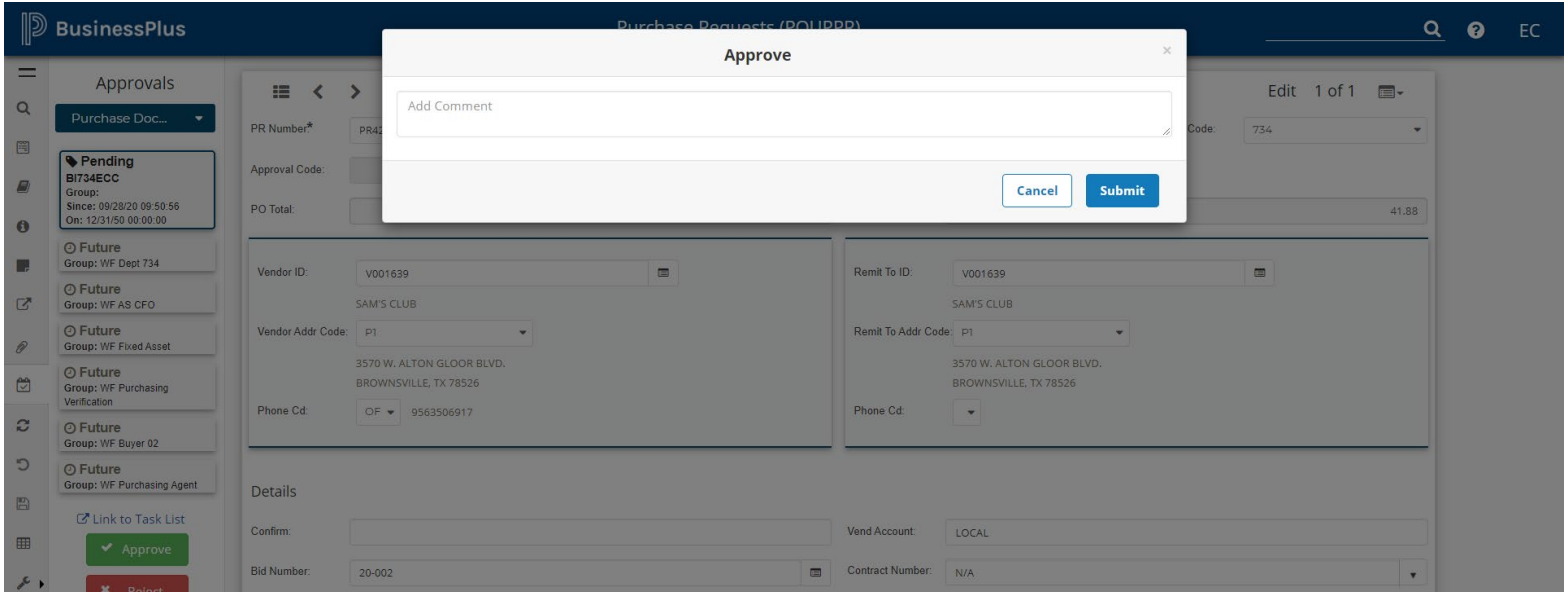
Remit To ID: V001639 Remit To Addr Code: P1
SAM'S CLUB
3570 W. ALTON GLOOR BLVD.
BROWNSVILLE, TX 78526
Phone Cd:

Details
Confirm: Vend Account: LOCAL
Bid Number: 20-002 Contract Number: N/A
End Use: Buyer:
Discount Terms: PO Type*: P

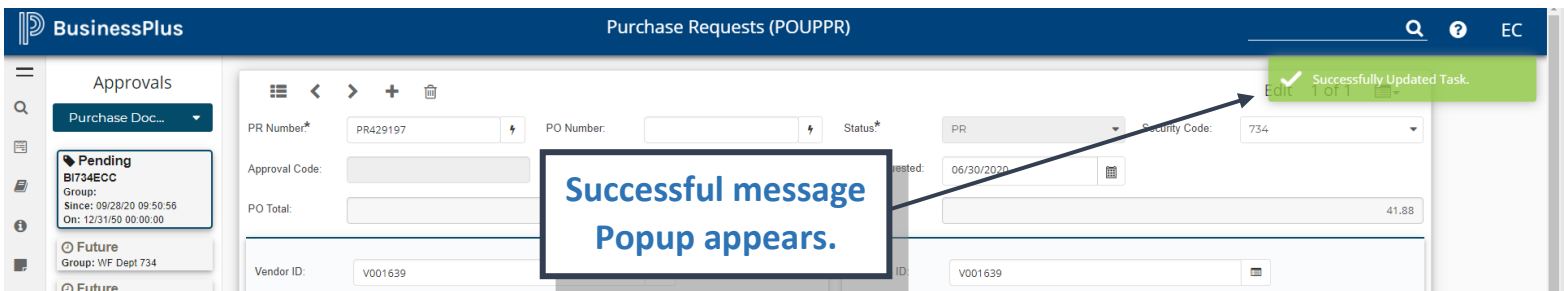
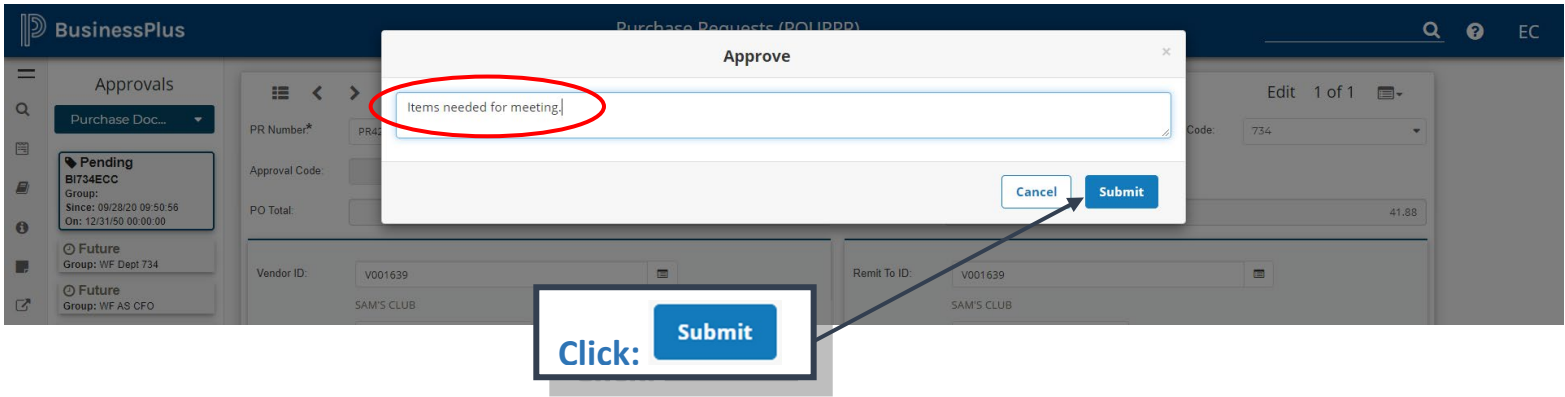
Requisition Codes
Req Code 1: Req Code 2:

Approvals sidebar:
Purchase Doc...
Pending B1734ECC
Group: Since: 09/28/20 09:50:56 On: 12/31/50 00:00:00
Future Group: WF Dept 734
Future Group: WF AS CFO
Future Group: WF Fixed Asset
Future Group: WF Purchasing Verification
Future Group: WF Buyer 02
Future Group: WF Purchasing Agent
Link to Task List
Approve
Reject
Hold
Forward

Comments box will populate. Space is available for any comments for the approvers.



****Note: DO NOT use special characters; such as: #, &, \$, @, *, %, etc... PR will not go thru.**



The screenshot displays the BusinessPlus interface for creating Purchase Requisitions (POUPPR). The top navigation bar includes the BusinessPlus logo, the title 'Purchase Requests (POUPPR)', and search, help, and user icons. On the left, an 'Approvals' sidebar shows a list of items with their status: 'Accepted' (BI734ECC), 'Pending' (BI734WRI), and several 'Future' items. The main area shows details for a requisition with PR Number PR429197, Status PR, and Security Code 734. A callout box with a blue border and red text points to the 'Pending' status in the sidebar, stating: 'Notice: Next approver in line is - Pending...'. The requisition details include Vendor ID, Vendor Name, Date Requested (06/30/2020), PO Total (0.00), and PR Total (41.88). Vendor information for SAMS CLUB is provided, including address and phone number. A 'Details' section at the bottom includes fields for Confirm, Bid Number (20-002), Vend Account (LOCAL), and Contract Number (N/A).

This screenshot shows the same BusinessPlus interface, but the requisition status is now 'Accepted'. The 'Approvals' sidebar shows the 'Accepted' status for BI734ECC, with a red circle highlighting the 'Note: Items needed for meeting.' text. A callout box with a blue border and red text points to this note, stating: 'Note: Approval comments will display in this area under each approver role.' The main requisition details are identical to the previous screenshot, but the Status is now 'PR' and the Approval Code is 'APRV'. The PR Total remains 41.88.

See example of a complete PR below.

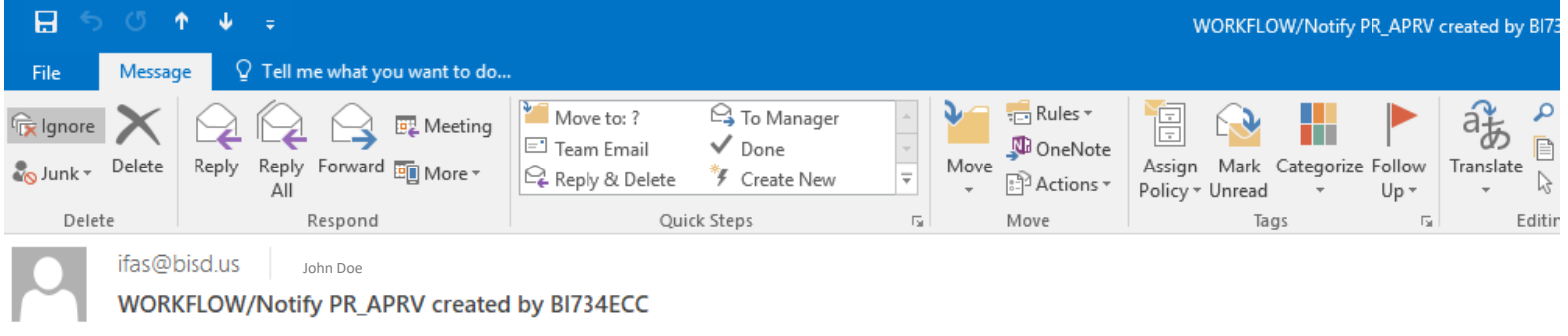
The screenshot displays the BusinessPlus interface for Purchase Requests (POUPPR). On the left, an 'Approvals' sidebar lists several approved requests with green checkmarks and user names like 'Todd A. Nichols' and 'David Robledo'. The main area shows a form for a purchase request with the following details:

- PR Number*: PR422959
- PO Number: P353969 (circled in red)
- Status*: FP
- Security Code: 734
- Approval Code: APRV
- Requested By: User Name
- Date Requested: 01/14/2020
- PO Total: 40.72
- PR Total: 40.72
- Vendor ID: V016593
- Remit To ID: V016593
- Remit To Addr Code: P1
- Vendor Address: NETSYNC NETWORK SOLUTIONS, 2500 WEST LOOP SOUTH STE. 510, HOUSTON, TX 77027
- Contract Number: DIR-TSO-3763
- PO Type*: P

A red box highlights the PO Number field, and a callout box contains the following text:

Note: A "PO#" has been assigned after PR has been approved by all users in accordance to the workflow module.

Once the PR has been fully approved; the PR Originator will receive an e-mail notification. See example e-mail below.



WORKFLOW MODEL INFORMATION:

User=BI734ECC
 Model=PR_APRV
 Activity=A13
 Key=9576D237-7F7A-47D9-A6E5-7346228CA8CA
 Version=11
 UniqueKey=60D87463-6A1C-4FB1-BC66-8986D4EFD47F

WORKFLOW INSTANCE INFORMATION:

Purchase Request# = PR429197
 PR Total\$ = 41.88
 Requested By = User Name
 Request Date = 6/30/2020
 Entry Date = 9/28/2020
 Bid Number = 20-002
 Vendor = V001639-SAM'S CLUB

Item#	Quantity	Price	Item Total	Product Code	Description	Project(s)	Split Amount/ Percent
0001	2.000	8.98	17.96	199-53-6399-00-734-Y-99-000-Y	Folgers Dark Roast Coffee.	100%	
0002	4.000	5.98	23.92	199-53-6399-00-734-Y-99-000-Y	Nestle Coffee Creamer	100%	
0003	2.000	.00	0.00	199-53-6399-00-734-Y-99-000-Y	Disposable plates.	100%	

WORKFLOW HISTORY INFORMATION:

User ID : BI734ECC
 Status : Accepted
 Date/Time : 9/28/2020 9:50:56 AM
 Comments: Items needed for meeting.
 User ID : BI734WRI
 Status : Accepted
 Date/Time : 9/30/2020 1:56:20 PM
 Comments: test
 User ID : BI734ECC
 Status : Accepted
 Date/Time : 9/30/2020 4:14:29 PM
 User ID : BI734ECC
 Status : Accepted
 Date/Time : 10/1/2020 4:27:04 PM
 Comments: Test
 User ID : PU729MRP
 Status : Accepted
 Date/Time : 10/1/2020 4:33:10 PM
 Comments: test 10012020
 User ID : BSI
 Status : Accepted
 Date/Time : 10/1/2020 4:38:14 PM

Email provides details of the Workflow history and a link to the documents that were attached to the PR.

ATTACHED DOCUMENTS:

TYPE/ URL	TABLE	DESCRIPTION	CREATED
POUPPR	Unknown	Quote	9/28/2020 10:11:33 A
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Note: Delivery of items may vary depending when order is actually placed to the Vendor by Purchasing Dpt. For any questions or concerns regarding your order you will need to contact Purchasing Dpt. (956)548-8361.

