

2021

HOW TO TRIGGER A PURCHASE REQUISITION

MANUAL

BUSINESS SOFTWARE HELPDESK

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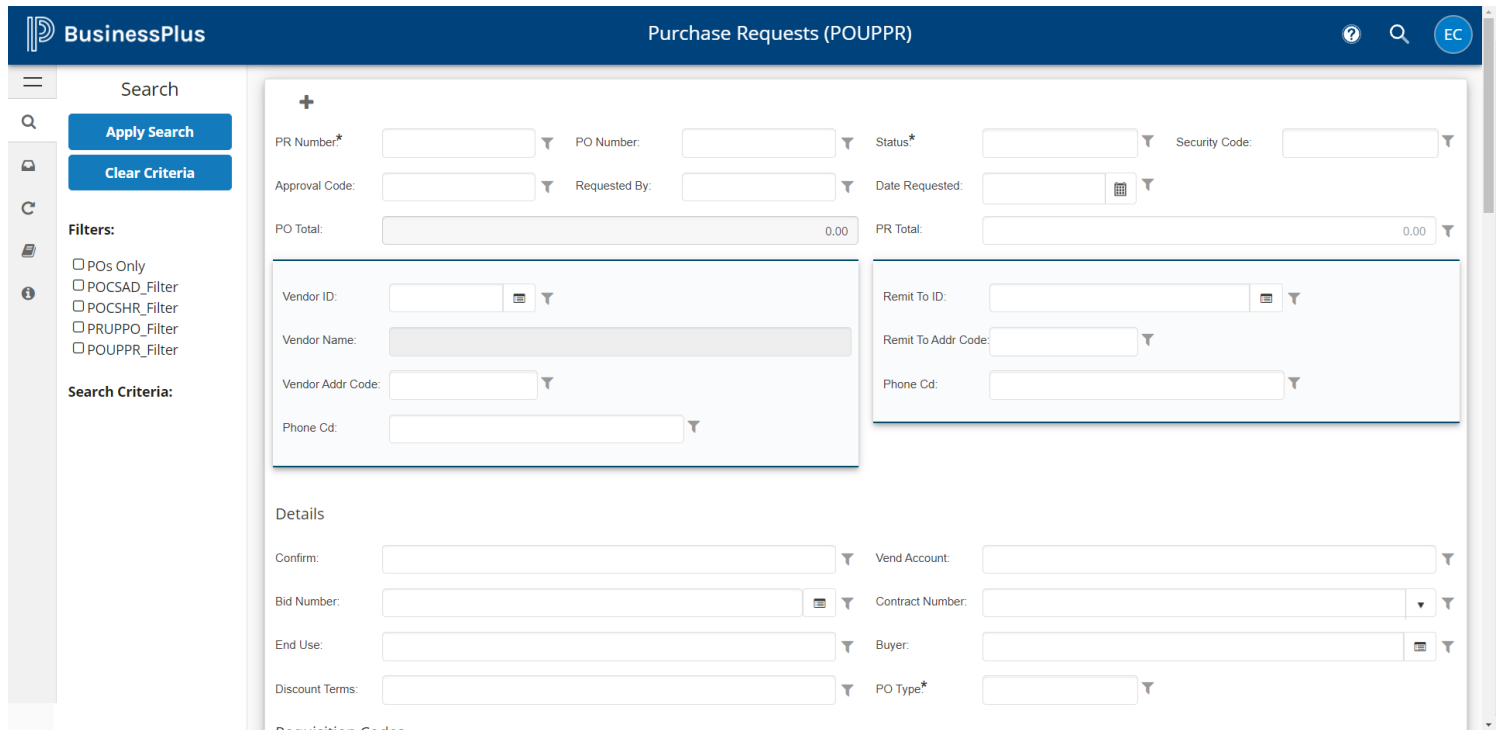
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Step 1: Access Purchase Requisition Screen

***NOTE:** Example provided is using the Secretary Dashboard to access the screen.



Purchase Requests (POUPPR) Screen will populate.



Step 2: Search for Purchase Requisition

BusinessPlus Purchase Requests (POUPPR)

Search

Apply Search

Clear Criteria

Filters:

- POs Only
- POCSAD_Filter
- POCSHR_Filter
- PRUPPO_Filter

PR Number*: PR456143

PO Number: [] Status*: [] Security Code: []

Approval Code: [] Requested By: [] Date Requested: []

PO Total: [] 0.00 PR Total: [] 0.00

Vendor ID: [] Vendor Name: []

Input: Purchase Request #.

Click: Apply Search

Purchase Request will populate.

BusinessPlus Purchase Requests (POUPPR)

Approvals

Purchase Doc... []

- Accepted BI734ECC Group: [] On: 10/15/21 16:20:38
- Not Accepted BI734WRI** Group: WF Dept 734 On: 10/15/21 16:22:05 Note: Need to attach quote please.

PR Number*: PR456143 PO Number: [] Status*: PR Security Code: 734

Approval Code: [] PO Total: [] 51.10

Vendor ID: V000712 Vendor Name: OFFICE DEPOT

Vendor Addr Code: P1 6225 WEST BY NORTHWEST BLVD. HOUSTON, TX 77040-4940

Phone Cd: OF 8002825585

Remit To Addr Code: P1 6225 WEST BY NORTHWEST BLVD. HOUSTON, TX 77040-4940

Phone Cd: OF 8002825585

Details

Confirm: [] Vend Account: TEST

Bid Number: TEST Contract Number: TEST

End Use: [] Buyer: []

Discount Terms: [] PO Type*: P

Requisition Codes

Req Code 1: [] Req Code 2: []

Note: Purchase Requisition has been rejected; needs to be triggered for correction and re-submitted through workflow.

Step 3: Input "*" – Confirm Field

The screenshot shows the 'Purchase Requests (POUPPR)' form in BusinessPlus. On the left, an 'Approvals' panel lists two items: 'BI734ECC' (Accepted) and 'BI734WRI' (Not Accepted). The main form has a 'Details' section with a 'Confirm' field containing an asterisk (*). A red circle highlights this field, and a blue callout box with an arrow points to it. The callout box contains the text: 'Input: An Asterisk * in the Confirm Field.' and 'Hit: Enter Key.' Below the callout, a smaller version of the 'Confirm' field is shown with an asterisk inside.

This screenshot shows the same 'Purchase Requests (POUPPR)' form after the asterisk has been entered. A green message box with a checkmark and the text 'Record(s) Accepted' is displayed at the top right. A blue callout box with an arrow points to this message box, containing the text: 'Message box will populate.' The 'Confirm' field now contains the asterisk (*). The 'Approvals' panel on the left remains the same.

Approvals


Purchase Doc... ▾

- ✓ **Accepted**
BI734ECC
Group: WF Dept 734
On: 10/15/21 16:20:38
Note: TEST
- ✗ **Not Accepted**
BI734WRI
Group: WF Dept 734
On: 10/15/21 16:22:05
Note: Need to attach quote please.

Vendor Addr Code: P1
6225 WEST BY NORTHWEST BLVD.
HOUSTON, TX 77040-4940

Phone Cd: OF 8002825585

Details

Confirm: *  **Click: to reload record.**

Bid Number: R

End Use:

Discount Terms:


Requisition Codes

Req Code 1: ▾
Req Code 3: ▾
Req Code 5: ▾
Req Code 7: ▾

BusinessPlus

Approvals

Purchase Doc... ▾

- ✓ **Accepted**
BI734ECC
Group: WF Dept 734
On: 10/15/21 16:20:38
Note: TEST
- ✗ **Not Accepted**
BI734WRI
Group: WF Dept 734
On: 10/15/21 16:22:05
Note: Need to attach quote please.
-  **Pending**
BI734ECC
Group: WF Dept 734
Since: 10/18/21 08:56:50
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

PR Number* PR456143

Approval Code: **Notice: Workflow has restarted.**

PO Total:

Vendor ID: V000712

Vendor Name: OFFICE DE

Vendor Addr Code: P1
6225 WEST BY NORTHWEST BLVD.
HOUSTON, TX 77040-4940

Phone Cd: OF 8002825585

Details

Confirm: *

Step 4: Re-Approve Purchase Requisition

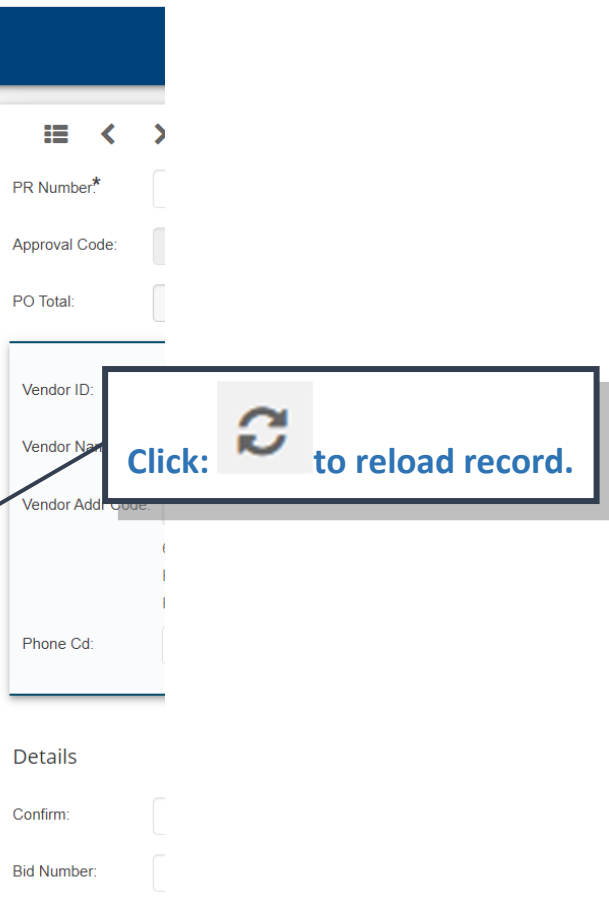
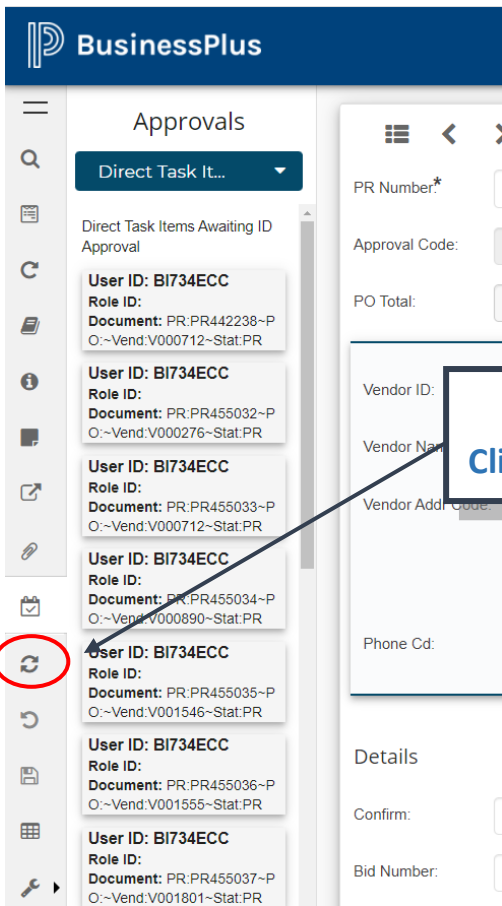
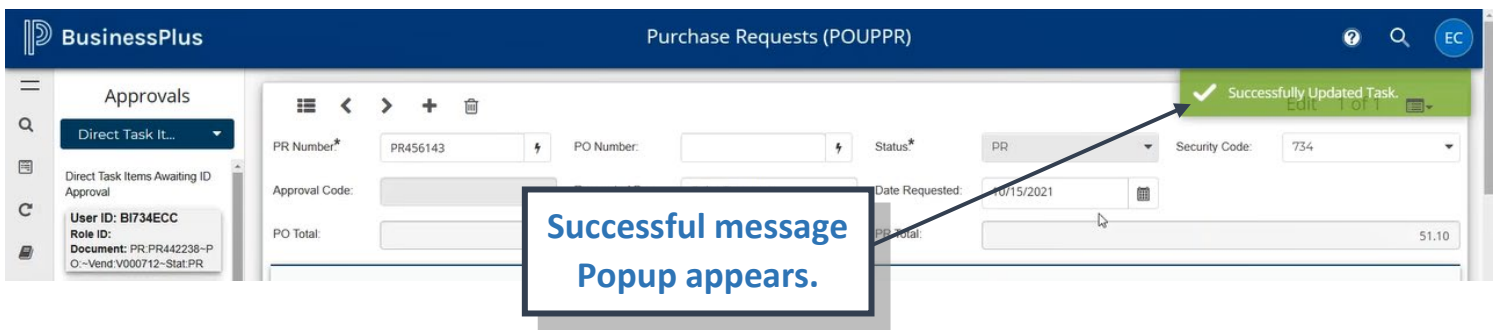
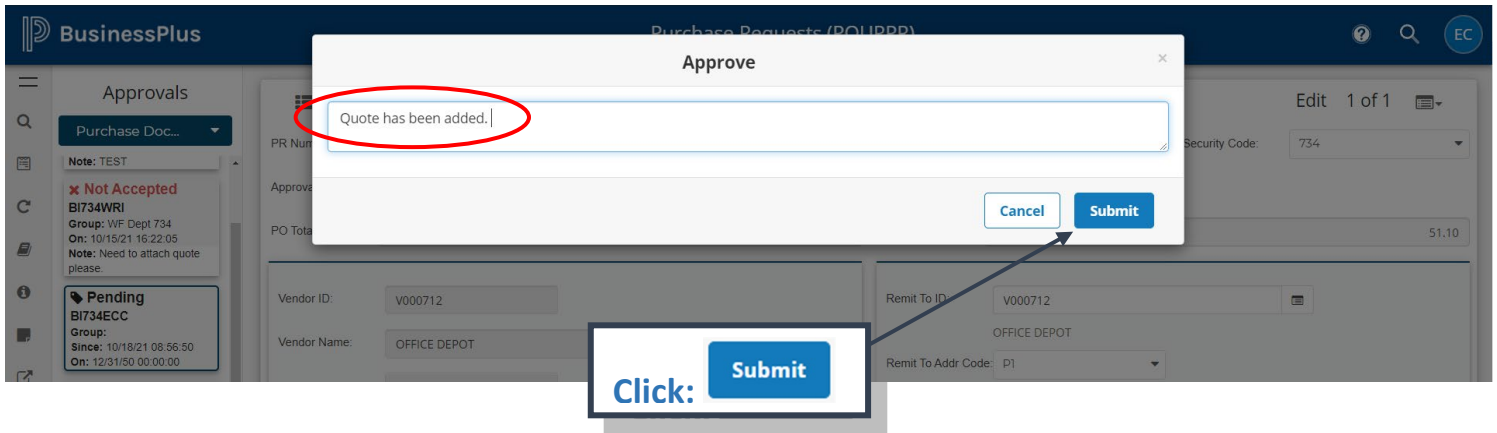
****NOTE: Make sure you have done the necessary corrections before proceeding!****

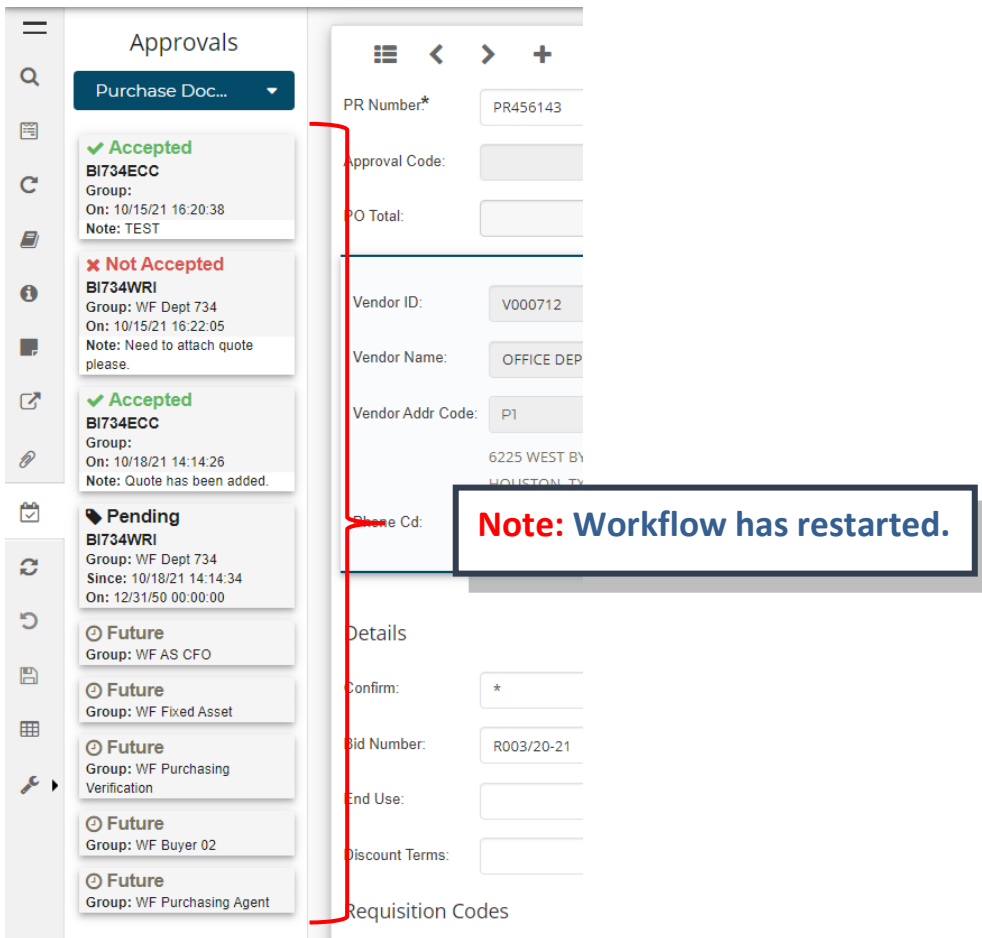
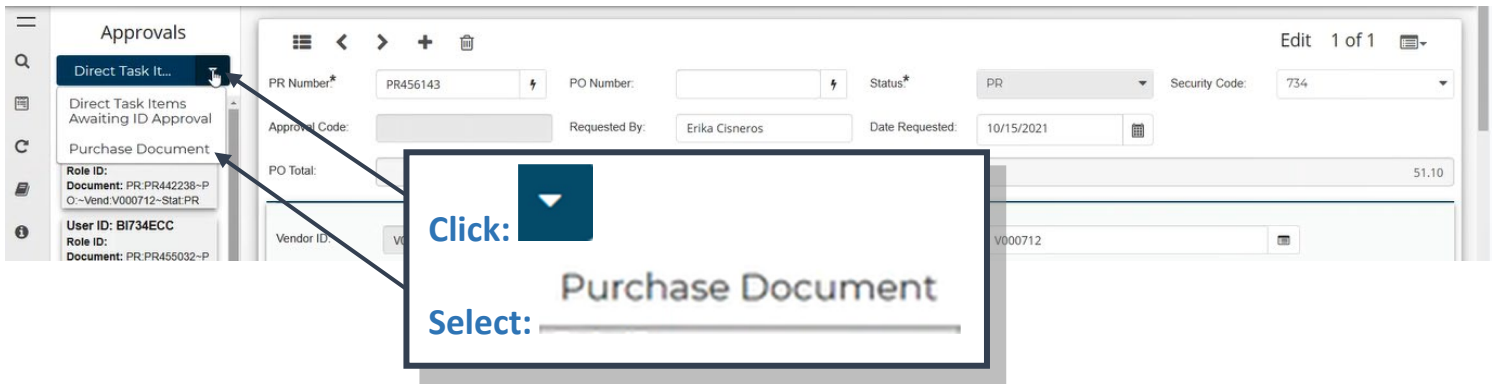
The screenshot shows the BusinessPlus interface for Purchase Requests (POUPPR). On the left, there is a sidebar with a list of approval items. One item is highlighted as 'Pending' with a green checkmark icon. Below the list are buttons for 'Approve', 'Reject', 'Hold', and 'Forward'. A callout box with a green checkmark icon and the text 'Click Approve to approve and submit through the Workflow.' points to the 'Approve' button. The main window displays the details of a purchase request, including PR Number (PR456143), PO Number, Status (PR), Security Code (734), Date Requested (10/15/2021), PO Total (0.00), and PR Total (51.10). Vendor information includes Vendor ID (V000712), Vendor Name (OFFICE DEPOT), and Vendor Address Code (P1). The 'Details' section includes fields for Confirm, Vend Account (TEST), Bid Number (R003/20-21), Contract Number (TEST), End Use, Buyer, Discount Terms, and PO Type (P). Requisition Codes are listed at the bottom.

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

The screenshot shows the 'Approve' dialog box in the BusinessPlus interface. The dialog has a title bar 'Approve' and a close button (X). Inside the dialog, there is a text area labeled 'Add Comment' and two buttons: 'Cancel' and 'Submit'. The background shows the purchase request details for PR Number PR456143 and Vendor ID V001639. The vendor name is SAM'S CLUB, and the address is 3570 W. ALTON GLOOR BLVD., BROWNSVILLE, TX 78526. The 'Details' section includes fields for Confirm, Vend Account (LOCAL), Bid Number (20-002), and Contract Number (N/A).

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





***Note:** It is recommended that you follow up on your PRs after submitting, to ensure that it is moving accordingly.