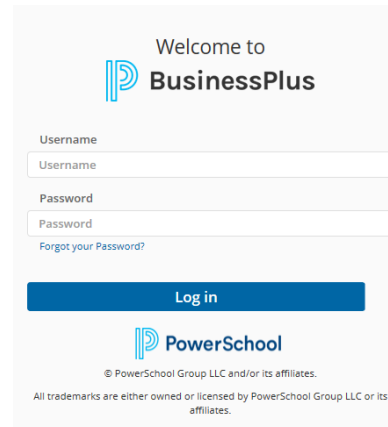




PURCHASE REQUISITION CREATION (POUPPR)

Navigation

Login to access the BusinessPlus Dashboard.



Welcome to
BusinessPlus

Username

Password

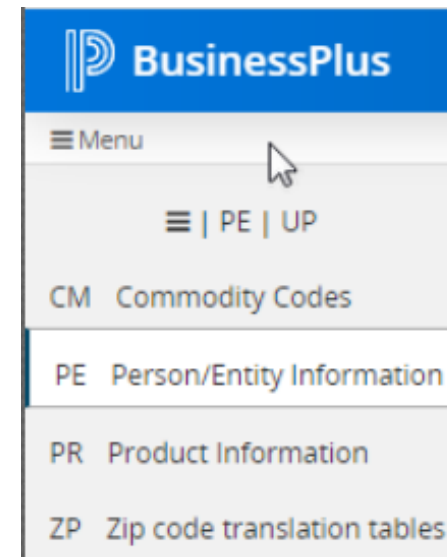
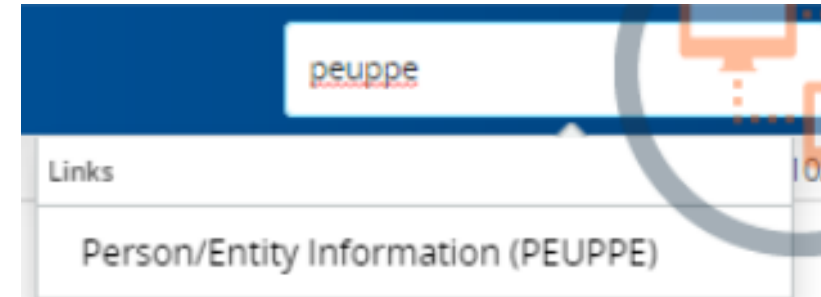
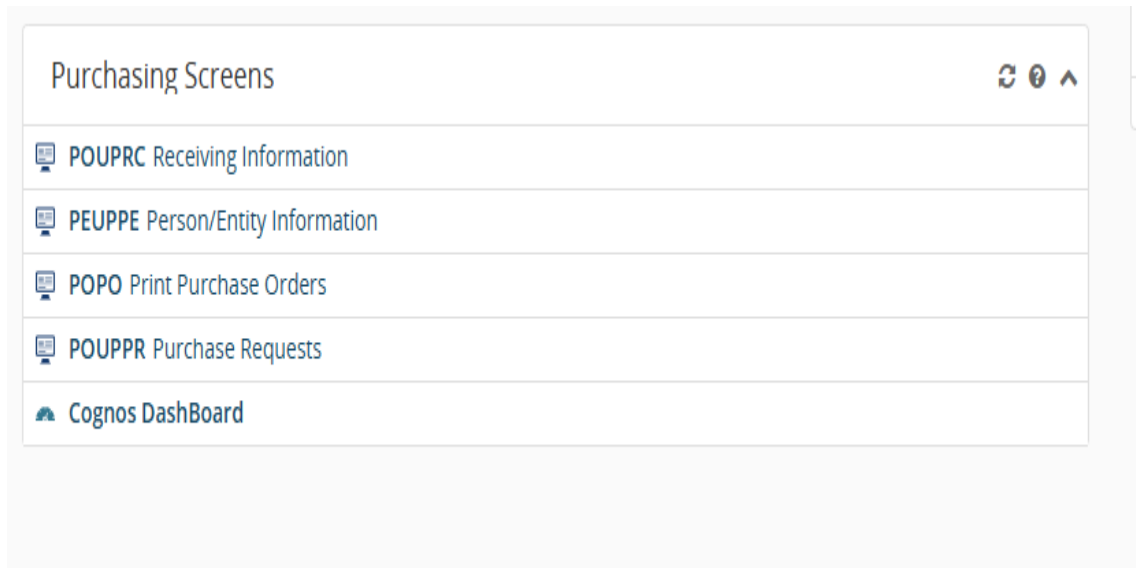
[Forgot your Password?](#)

Log in

PowerSchool

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Screens can be accessed by the Dashboard Links, entering the menu mask in the Search field or using the Complete Menu on the Dashboard.



Screens open in **Search** mode

BusinessPlus

Person/Entity Information (PEUPPE)

?

Search

Apply Search

Clear Criteria

Filters:

No Default Filters

Search Criteria:

+

PE ID*

Security Cd

Expire Date

Status

Name*

First Name

SSN

Select 1

Middle Name

Affiliation

Select 2

Last Name

Salute Cd

Suffix

Nickname

Created

Web URL

Addresses

Phones

Emails

Vendor

Customer

Price Calcs

Relations

Associations

Text

Address Type*

Status

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Zip

City

St/Prov

Country Code

Contact ID

Attention

PR Creation – POUPPR

The screen will open in Search Mode. Click the Add icon to go into Add mode the screen. Note that the screen says Add in upper right corner. **Required fields have a red asterisk * on the top portion of the form.**

Click the **plus** sign to change to Add mode for data entry.

Purchase Requests (POUPPR)

+

PR Number*

PO Number

Status*

Security Code*

Approval Code

Requested By

Date Requested

PO Total

0.00

PR Total

0.00

Vendor ID*

Vendor Name

Vendor Addr Code

Phone Cd

Remit To ID

Remit To Addr Code

Phone Cd

Details

Confirm

Vend Account

Bid Number

Contract Number

End Use

Buyer

Discount Terms

PO Type*

Requisition Codes

Header Information

PR Number – The system will assign the next available number. Click on the **lightning bolt** to view a listing of available seeds. Select the appropriate seed and note the number assigned for future reference.

PR Number*

Approval Code

PR.SEED

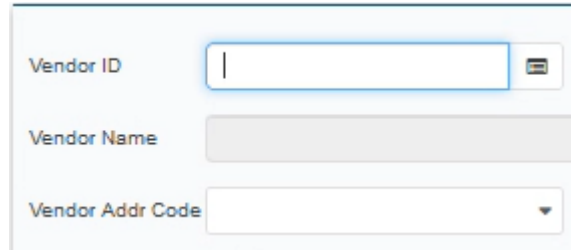
Security Code/Department ID

Enter School/Dept you are creating request for

Security Code*

Code	Description
Not Selected	
101	Adams Elementary School
102	Audubon Elementary School
104	Bristol Elementary School
105	Buena Vista Elementary School
106	Carver Elementary School

Vendor ID: –To access the lookup **feature**, click



A screenshot of a web form for vendor lookup. The form is light blue and contains three input fields. The first field is labeled 'Vendor ID' and has a blue border; it contains a single vertical line cursor. To its right is a small button with a magnifying glass icon. The second field is labeled 'Vendor Name' and is a wide, light gray rectangular box. The third field is labeled 'Vendor Addr Code' and is a white rectangular box with a small downward arrow on its right side.

The search can be initiated by PE ID, Name or Security Code. There is a dropdown list of operators to select by on the lookup button. If your vendor is not set up, you can choose vendor number V0000001.

Data Lookup

Search ID Source: All

PE ID	Name	Security CD	Pedb Code
v22			
V2200490	100% Educational Videos		P
V2202422	1st Alert		P
V2205148	1st Enterprise Bank		P
V2209108	1st Touch Electric Inc		P
V2206641	2010 Office Furniture	22	P
V2204882	21st Century Learning	22	P

⏪ ⏴ 1 2 3 4 5 6 7 8 9 10 ... ⏵ ⏩
1 - 10 of 8850 items

Code	Address Line 1	Address Line 2	Address Line 3	Address Line 4	City
AA	PO Box 4440				El D
PA	4921 Robert J Matthews Pkwy	Suite 2			El D

1 - 2 of 2 items

Add
Close
Ok

Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record.

Note that all addresses defined for a vendor will be listed in the lower portion of this screen. The highlighted address is the one that will be brought into the record. Click to highlight the appropriate address.

The vendor information is now populated

Vendor ID	V2200490	
	VIDEOS	
Vendor Name	100% EDUCATIONAL VIDEOS	
Vendor Addr Code	PA	
	4921 Robert J Matthews Pkwy Suite 2 El Dorado Hills, CA 95762	
Phone Cd	FX	8884781426

Enter the Buyer in the “Buyer” Field

Click into the search field

Details

Confirm

Vend Account

Bid Number

Contract Number

End Use

Buyer

Discount Terms

PO Type*

p

Type the word buyer in the Security CD field

Data Lookup

Search ID Source: All

PE ID	Name	Security CD	Pedb Code
		buyer	
B11	Bridges, Shantelle	BUYER	P
B06	Capps, Mark	BUYER	P
B01	Diaz, Anna	BUYER	P

Choose your buyer according to your Procurement Assignment List and click OK. **Do not leave this field blank!** Note-You can also directly type the buyer number into the buyer field. The buyer number is next to the buyer's name on the Procurement Assignment List.

Data Lookup

Search ID Source:

All

PE ID	Name	Security CD	Pedb Code
		buyer	
B11	Bridges, Shantelle	BUYER	P
B06	Capps, Mark	BUYER	P
B01	Diaz, Anna	BUYER	P
B08	Garcia, Rosa	BUYER	P
B03	Johnson, JaNail	BUYER	P
B09	KupFerman, Jocelyn	BUYER	P

PO Type – Choose the purchase order type. P (Standard PO) for an itemized PO. Select B - Blanket for orders based on dollar amounts. ****Note-Use Blanket for any service requests and use Standard PO for purchase order requests that are commodities (supplies, furniture, etc.).***

PO Type*

p

Code	Description
	Not Selected
B	Blanket Order
C	Contract
P	Standard PO
T	Item Contract

Req Code 2

Req Code 4

Req Code 6

Req Code 8

Blanket Amount – (This field is **only** required if the PO Type is a Blanket-See slide 26). Enter the full amount of the Blanket PO.

Blanket Amt

10,000.00

Ship To ID: –Use the lookup feature to select the correct ID or enter the ID if known. ** Note-Enter your school or department even if you are not actually shipping an item (ex: software).*

Data Lookup

Search ID Source: All

PE ID	Name	Security CD	Pedb Code
101			
101	ADAMS ELEMENTARY SCHOOL	LOCATION	P

Ship To ID*

101

ADAMS ELEMENTARY SCHOOL

Ship To Addr Code

PR

2101 MANITOBA DRIVE

COLORADO SPRINGS, CO 80910

Phone Cd

Bill To ID: –Use the lookup feature to select Procurement.

Bill To ID*

Bill To Addr Code

Phone Cd

Type Procurement in the Name search

Choose the top department 660 option

Data Lookup			
			Search ID Source: All
PE ID	Name	Security CD	Pedb Code
	procurement		
660	PROCUREMENT AND CONTRACTING	LOCATION	P
V0000003	PROCUREMENT PLEASE ASSIGN VENDOR	VENDOR	P

The Bill To ID information for Procurement is now populated

Bill To ID*	660
	PROCUREMENT AND CONTRACTING
Bill To Addr Code	PR
	1115 NORTH EL PASO STREET COLORADO SPRINGS, CO 80903
Phone Cd	

Item Information

***Note-Only enter the items below. DO NOT ENTER ANYTHING FOR PRODUCT CODE ON THIS REQUISITION!**

- **Quantity** – If Purchase Requisition is being itemized, enter the exact quantity for the item being purchased. If the Requisition is a Blanket, then enter a 1 as the quantity.
- **Unit** – Enter or select the appropriate Unit of Measure from the drop-down list. Access the list by clicking on the down arrow.
- **Unit Price** – Enter the dollar amount for the item entered. This is the amount that will be encumbered. If entering a number with no cents, it is not necessary to enter a decimal and zero cents.
- **Description** – Enter description of item being purchased. If creating a blanket, enter general description of items being purchased (for example, Office Supplies). Be as detailed as possible (item number, ISBN, etc.)

****Only the first 30 characters of the description entered will be included in the GLDB.**

Items

Notes

Add

Item Number

0001

Vendor Item No

Product Code

Quantity

0.00

Units

Unit Price

0.00000

Extended Amt

0.00

Catalog Number

Item Description

Notes and Text

PR Notes and Text are entered under the Notes tab on POUPPR. **PR Notes** are internal and do not print. Use this notes tab to communicate internal notes like the vendor contact information.

The screenshot displays a web interface for POUPPR. At the top, there are two tabs: 'Items' and 'Notes'. The 'Items' tab is highlighted with a red rectangular box. Below these tabs, there are three buttons: 'PR Notes', 'Print Before', and 'Print After'. The 'PR Notes' button is highlighted in blue. Below the buttons is a large, empty rectangular text area for entering notes. In the bottom right corner of this text area, there is a small icon consisting of three diagonal lines.

Account – Enter the GL Account Number to be encumbered for the purchase. If the numbers are known, simply type them into the appropriate field.

To see a list of available Accounts, make sure your cursor is in the first blank field, and then click on the ellipses icon to access the Lookup Account.

The screenshot shows a Purchase Request form. At the top, there are buttons for '+ Add Account' and 'Switch to: Amount'. Below this is a table with columns: Account, Percent, and a 'Delete' button. The 'Account' column has a dropdown menu open, showing options: '68', 'SUBF', 'RESR', 'YEAR', 'OBJ', 'GOAL', 'FUNC', 'SITE', 'MISC', and '100'. The 'Percent' column shows '100'. Below the table, there are various fields for discounts, taxes, and other details. A dropdown menu is also visible on the right side of the form, showing options: 'Lookup SUBF', 'Lookup Account', '68 Fully Qualified', '68 Org Key-Object', '68 Quick', 'Show Ledger', 'Show Job Ledger Side', and 'Show Work Order'.

A list will appear of account numbers available based on the user’s security profile. The search can be initiated using the boxes of selection criteria that includes the background parts of the GL Account Number with the standard list of operators. Click below to go to the next page.

The screenshot shows the 'Ledger Lookup' form. It has a table with columns: Account, Long Description, Long Desc, and Year. The 'Account' column has a dropdown menu open, showing options: '68', 'SUBF', 'RESR', 'YEAR', 'OBJ', 'GOAL', 'FUNC', 'SITE', 'MISC', and '100'. The 'Long Description' column has a dropdown menu open, showing options: '68 Fully Qualified', '68 Org Key-Object', '68 Quick', 'Show Ledger', 'Show Job Ledger Side', and 'Show Work Order'. The 'Long Desc' column has a dropdown menu open, showing options: '68 Fully Qualified', '68 Org Key-Object', '68 Quick', 'Show Ledger', 'Show Job Ledger Side', and 'Show Work Order'. The 'Year' column has a dropdown menu open, showing options: '2020', '2021', '2022', '2023', and '2024'.

Double-click on the appropriate code to have the system bring it into the Purchase Request record.

Example of the Ledger Lookup Screen

Ledger Lookup

Account	Long Description	Long Desc	Year	Status
ies		*suppl	2020	
101-0000-0-4300-0000-0000-000000000	General-Undes	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-0000-2100-000-690000000	General-Undes-SupvAdmn	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-0000-3160-000-000000000	General-Undes-PuplTest	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-0000-7300-000-000000000	General-Undes-Bus/Fisc	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-0000-7550-000-000000000	General-Undes-Grph Art	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-1130-1000-050-000000000	General-Undes-Instrctn	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-1130-1000-053-000000000	General-Undes-Instrctn	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-1130-1000-061-000000000	General-Undes-Instrctn	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-1130-1000-064-000000000	General-Undes-Instrctn	MATERIALS & SUPPLIES	2020	A
101-0000-0-4300-1130-1000-067-000000000	General-Undes-Instrctn	MATERIALS & SUPPLIES	2020	A

Close

Ok

Splits - Charging multiple accounts for items

Click the Add Account button to add additional lines if the charge is to be split between accounts.

+ Add Account

Switch to:

Amount

Total: 100% Remaining: 0%

Account										Percent	
08	SUBF	RESR	YEAR	OBJ	GOAL	FUNC	SITE	MISC	...	100	Delete
08	SUBF	RESR	YEAR	OBJ	GOAL	FUNC	SITE	MISC	...	0	Delete

Item expenses can be split to multiple accounts by either dollar amounts or percentages using the *Switch to:* button to toggle between Amount to Percent. Common Code POPR/SPLIT can be configured to change the default from Percent to Amount.

When splitting by percent the total must equal 100%.

+ Add Account

Switch to:

Percent

Total: \$25.00 Remaining: \$25.00

Account										Amount	
08	SUBF	RESR	YEAR	OBJ	GOAL	FUNC	SITE	MISC	...	0.00	Delete
08	SUBF	RESR	YEAR	OBJ	GOAL	FUNC	SITE	MISC	...	0.00	Delete

Splitting accounts by amount

+ Add Account

Switch to:

Percent

Total: \$25.00 Remaining: \$0.00

Account										Amount		
68	▼	0101	0000	0	4300	0000	3120	000	00000000	...	15.00	Delete
68	▼	0101	0000	0	4300	1130	1000	061	00000000	...	10.00	Delete

When splitting an account by amount, the split amount must equal the extended amount that may include tax, shipping and duty charges.

To delete an account from split:
Use the Delete button to remove a line from the split. A pop-up is used to confirm the delete.

Are you sure you want to delete this account?

No

Yes

+ Add Account

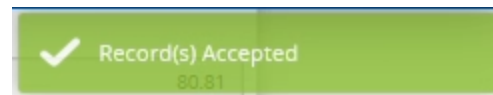
Switch to:

Amount

Total: 100% Remaining: 0%

Account										Percent	
68 ▾	0101	3010	0	4300	1110	1000	073	00000000	...	100	Delete ⬆ ⬇

Press Enter to save the first line item on the Purchase Requisition. A green message stating “Record Accepted” will appear in the upper right portion of the screen if all required fields are complete and there are not any budget warnings or blocks. Until the “Record Accepted” message is received the record is not saved in the database.



The system automatically numbers the next line item in anticipation of additional records. Add an additional line for each purchase type (ex: ordering 3 different books would need 3 item numbers). You will hit enter and get a new confirmation after addition each line.

Items

Notes

☰

Item Number

0002

⚡

If no additional records are to be entered, close the screen by clicking the Close link on the upper right corner of the screen.

There will be times when the “Record Accepted” message is not generated and a budget warning appears instead. These warnings are intended to inform the user that funds are not available and to take the necessary steps to transfer money into the account or choose another account to expense the purchase. Budget warnings can be overridden, and the record saved by simply pressing the Enter key again until the “Record Accepted” message is received. Budget Blocks cannot be overridden.

Blanket Purchase Orders

Blanket Purchase Orders are used when the order is not itemized, (Ex: supplies) and is based on dollar amounts (ALL SERVICE REQUESTS). The PO type must be changed to B. The rest of the requisition process is the same.

Service Purchase Orders will be set up as a Blanket Purchase Order. If you have a service and a commodity, you cannot combine the request. You will need separate requests.

Details

Confirm

Vend Account

Bid Number

Contract Number

End Use

Buyer

Discount Terms

PO Type

B

Requisition Codes

Req Code 1

Req Code 2

Req Code 3

Req Code 4

Req Code 5

Req Code 6

Req Code 7

Req Code 8

Req Code 9

Req Code 10

Code

Description

Not Selected

B

Blanket Order

C

Contract

P

Standard PO

T

Item Contract

Dates

Required Dt

Expiration Dt

06/30/2023

Entry Dt

10/05/2022

Expected Dt

Delivery Dt

Blanket

Blanket No

Blanket Amt

5,000.00

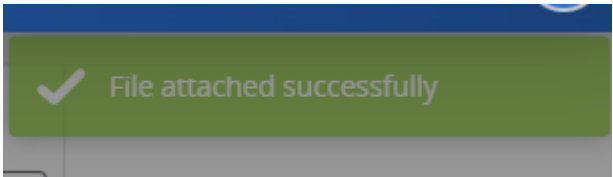
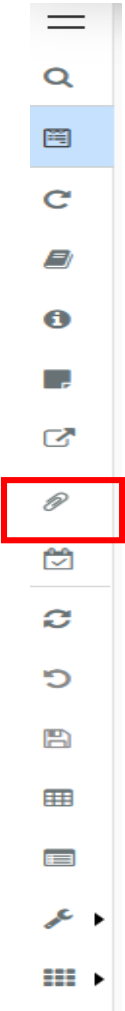
Rm

0.00

The Blanket Amount also needs to be entered.

Adding an attachment

Before you close out of the requisition, click on the paperclip on your left sidebar menu, then add the attachment (Ex: Quote/Proposal). You will get a confirmation that the file was successfully added.

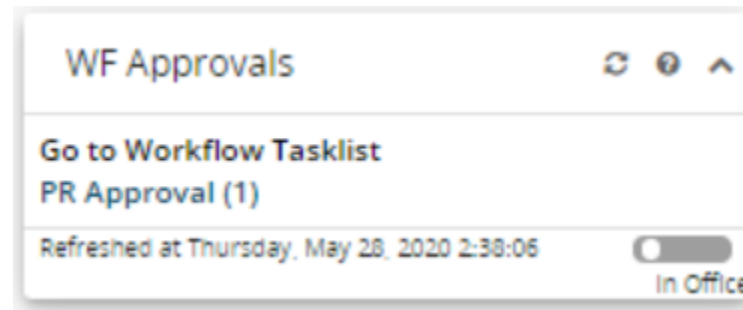


Purchase Requisition Approvals

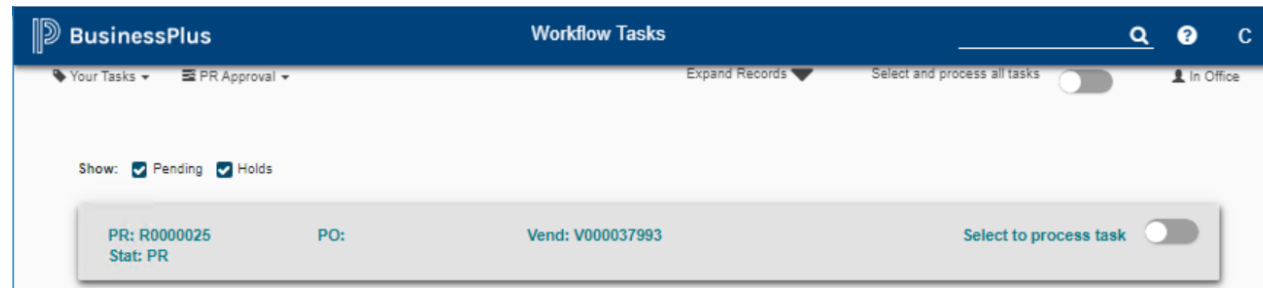
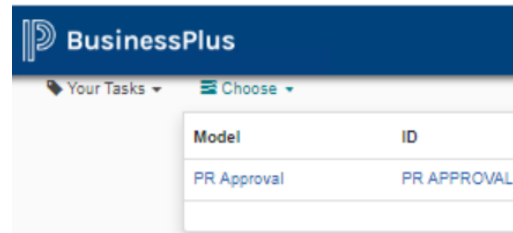
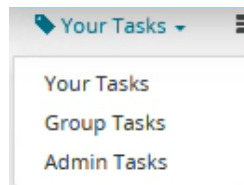
There are two methods that may be used to approve a purchase requisition. The approvals may be given from a task list on the Dashboard, or workflow task list (see below).

Workflow Task list

Click the link 'PR Approval' on the WF Approval Component on the Dashboard to access the task-list.



The user can see a list of tasks awaiting their approval by User or Group. The default is by User – Your Tasks. Select the Choose icon to display the dropdown and select PR Approval from the list. If the user is responsible for other types of approvals, they can access those lists from this page



Click on the PR number on the list to view Details about the requisition.

Your TasksPR ApprovalExpand RecordsSelect and process all tasksIn Office

Show: Pending Holds

PR: R0000025
PO:
Vend: V000037993
Stat: PR

Select to process task

DetailsAttachmentsHistory

Purchase Request = R0000025
Ship To = 0051
PR Total\$ = 169.95
Req Codes = -----
Requested By = Consultant
Request Date = 5/28/2020
Entry Date = 5/28/2020
PO Type = P
End Use =
Vendor = V000037993 - MAY OFFICE SUPPLIES

Item#	Quantity	Price	Tax	Shipping	Item Total	FA
0001	5.000	33.99	.00	.00	169.95	N

AccountSplit Amt/Pct

There are also tabs to access Attachments and view approval History.

PR: R0000025
Stat: PR

PO:

Vend: V000037993

Select to process task

DetailsAttachmentsHistory

Doc Id	Attach Id	Created	Documents	Description
12125	POUPPR_EXTERNAL	5/28/2020 2:52:31 PM	1	quote

Details Attachments History						
User	Name	Group	Status	When In	When Out	Comment
BSI	IT STAFF USERID(DO NOT CHANGE)		 Pending	10/5/2022 12:14:40 PM		
TBA	To Be Assigned	99_BUYER	 Future	Future Task Item		
BSI	To Be Assigned		 Future	Future Task Item		

The user may then select the record(s) to approve, reject, hold or forward.

 Approve

 Reject

 Hold

 Forward

Comments may be added when approving or rejecting a requisition.

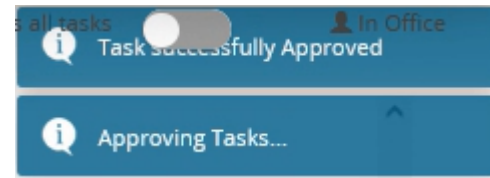
Approve Task (1)

Add Comment

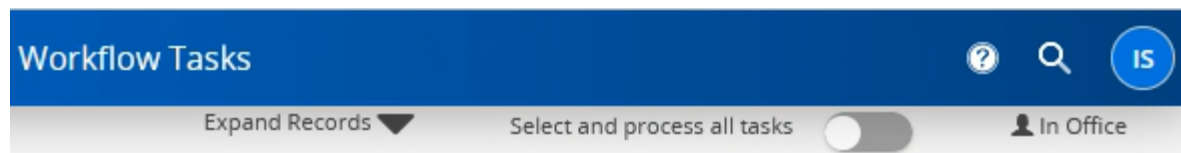
Cancel

Submit

You will receive a confirmation that your task has been successfully approved



There is also a toggle to click when for the user to indicate when they are Out of Office and unable to approve tasks. This directs tasks to the next authorized approver for that activity.



Questions?

- Training materials are located in the Procurement Department page on the D11 website.

<https://www.d11.org/administration/operations/enterprise/procurement-and-contracting>

- Call or email your assigned Procurement Representative. The list is available on the Procurement Department page on the D11 website.

<https://www.d11.org/administration/operations/enterprise/procurement-and-contracting>