caddo
Purchasing Department

Business Plus Workflow Guide

for Administrators

Updated August 2022

Contacts

Procurement Professionals:

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Scott Sullivan	Chief Buyer	603-6477
Shari Foreman	Senior Buyer	603-6482
Marguerite Roberson	Buyer's Assistant (Business Plus Training, Maintenance POs, & New Vendor Set-Up)	603-6978
Shelia Jones	Buyer's Assistant (Textbook Orders, Garage POs, & New Vendor Set-Up)	603-6478
Various Purchasing Staff	Questions regarding PR entry, PO receipting, & disencumbrances/cancellations	603-6481
Cynthia Garlington	Maintenance (Warehouse orders) Located at Warehouse	603-5523
Lisa Paine	Accounting (Account system errors – all accounts)	603-6269
Robert Lewis	Accounts Payable (Invoicing)	603-6280
Tabatah Washington	Finance (General fund/CEEF inquiries)	603-6354
Marchelle Cavanaugh	Finance (General fund/CEEF inquiries)	603-6353
Virgin Rachal	Finance (New user set up)	603-6510
Dolph Dickson	I.T. (Primary contact for Business Plus inquiries, issues, and password reset)	603-6411
Leah Fredrick	I.T. (Secondary contact for Business Plus inquiries, issues, and password reset)	603-6396
Chaunda Wilson	I.T. (Workflow-related issues)	603-6404

If you need assistance with Business Plus, please direct your question to the appropriate person/department above.

*If you a have new secretary/bookkeeper notify Virgin Rachal in Finance to start the set-up process to allow them to enter requisitions. I.T. will notify them by email with a user name and temporary password when set up is complete. At that time the new secretary/bookkeeper will need to notify Marguerite Roberson in Purchasing so training can be scheduled.

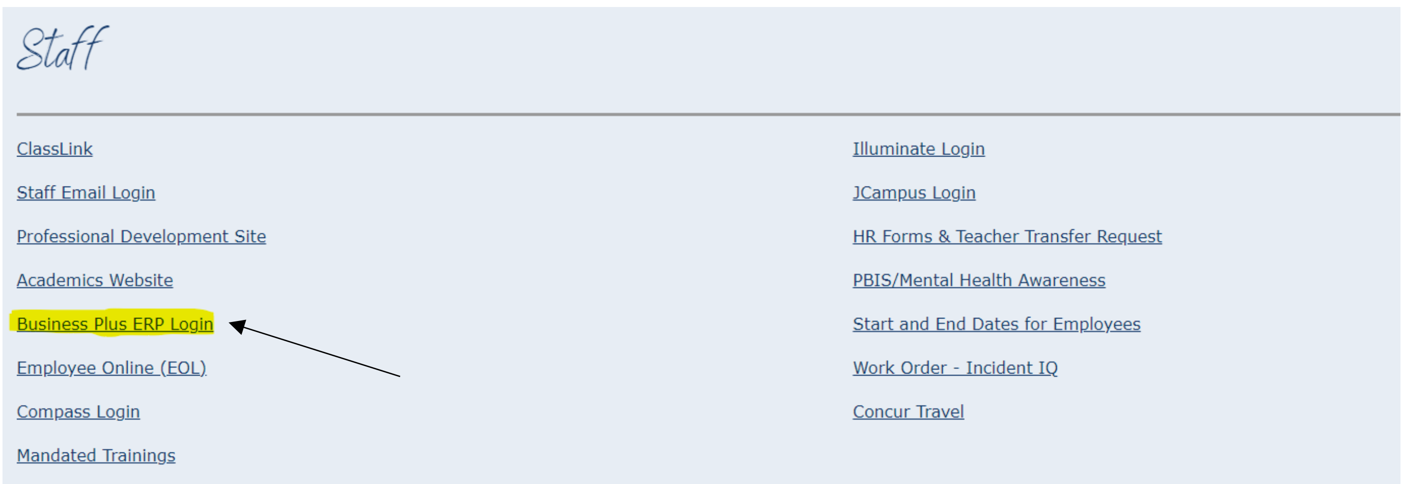
**If you change locations or acquire new accounts contact Virgin Rachal so she can make necessary changes/updates in Business Plus.

Workflow is the electronic process that Caddo uses to route approvals in Business Plus. This is intended as a quick reference guide, documenting the process for Workflow approvals. For further instruction regarding approvals you may contact someone in Purchasing.

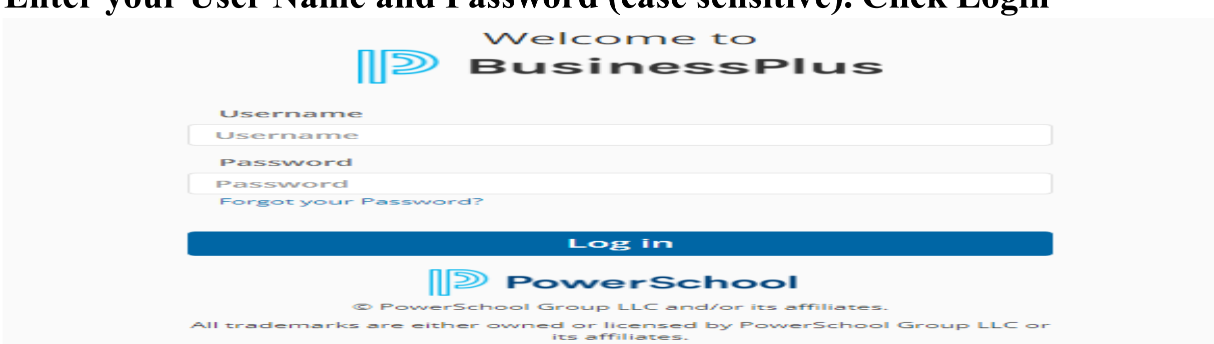
Log in to Business Plus

From your web browser go to the CPSB Website: Scroll down the homepage to locate the staff tab then click "Staff"

Click on "Business Plus ERP Login"

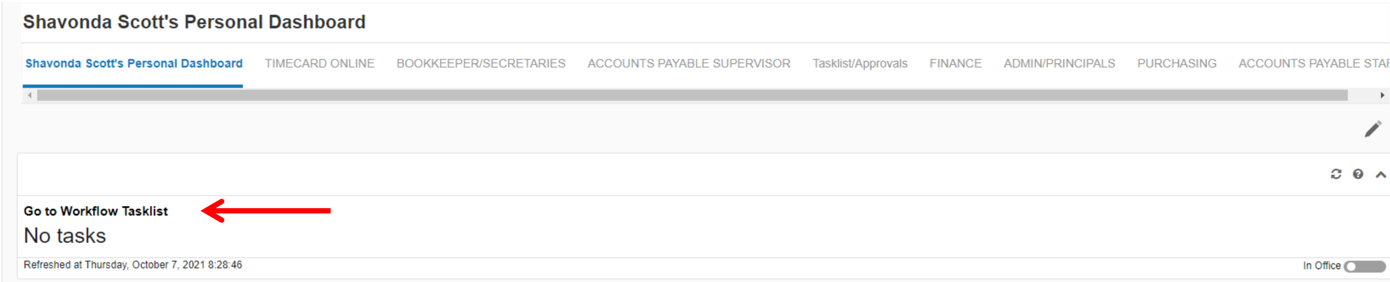


When the Welcome to BusinessPlus Powerschool screen appears: Enter your User Name and Password (case sensitive). Click Login



You may save this page to your Bookmarks so you can access Business Plus without having to go through the CPSB website.

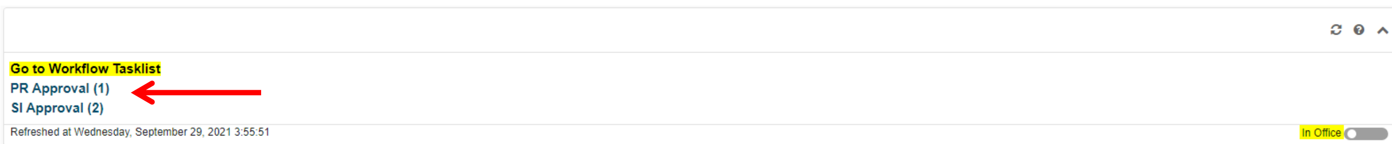
User Dashboards should appear after login along with the "Workflow Tasklist"



There are no PRs pending approval if "No Tasks" is displayed in the Workflow Tasklist box. "PR Approval" or "SI Approval" will be displayed if there are pending approvals.

APPROVALS

In the Workflow Tasklist box you will see PR Approval or SI Approval followed by a number in parenthesis. The number in parenthesis denotes the number of pending approvals for each category. Click on the "PR Approval or SI Approval" title to review, approve, or reject requisitions pending in your Workflow.



1. Click on the PR Approval or SI Approval in the Go to Workflow Tasklist to view pending approvals.
2. Click on the PR number to view summary details, attachments, and history. To view the individual PR, click the Link to Record button.
3. Double check the order to confirm all information is correct by viewing the details or linking to the record.
4. If approving from the workflow task list screen, click on the button beside "select to process task". The approval buttons will appear at the bottom of the screen (see figure 2 below). To approve all items at once, select the "Select and process all tasks" button located at the top of the task list screen.
5. If approving after linking to the record, click on the  icon to view the workflow task list (see figure 3 below).
6. After selecting an approval option, a comment box will appear. You do not have to enter a comment but you must click "Submit" to allow the PR to progress through the Workflow. Comments in this section are visible to workflow approvers only and <u>will not</u> print on the PO.
7. To ensure your order was successfully submitted for approval make sure that you see a green check mark and accepted above your name if viewing the workflow from the POUPPR screen or a status of accepted on the history tab if viewing from the workflow task list screen. If you do not select an option your order will remain in workflow and not be processed.

Figure 1

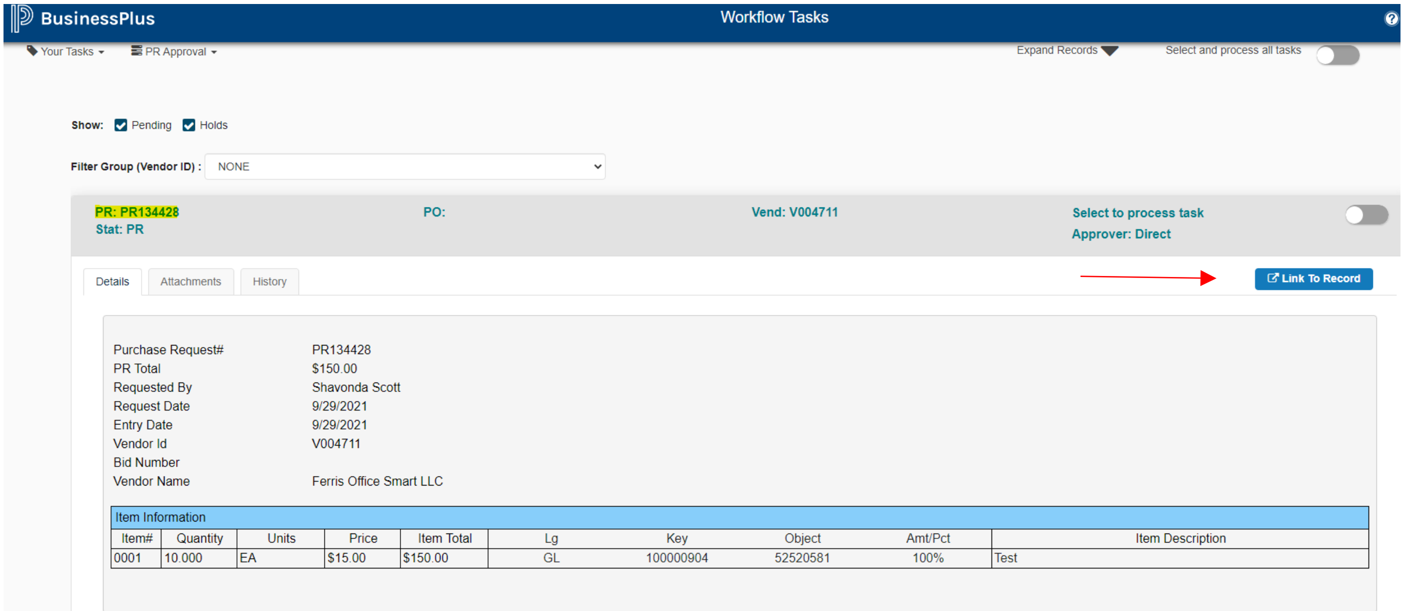


Figure 2

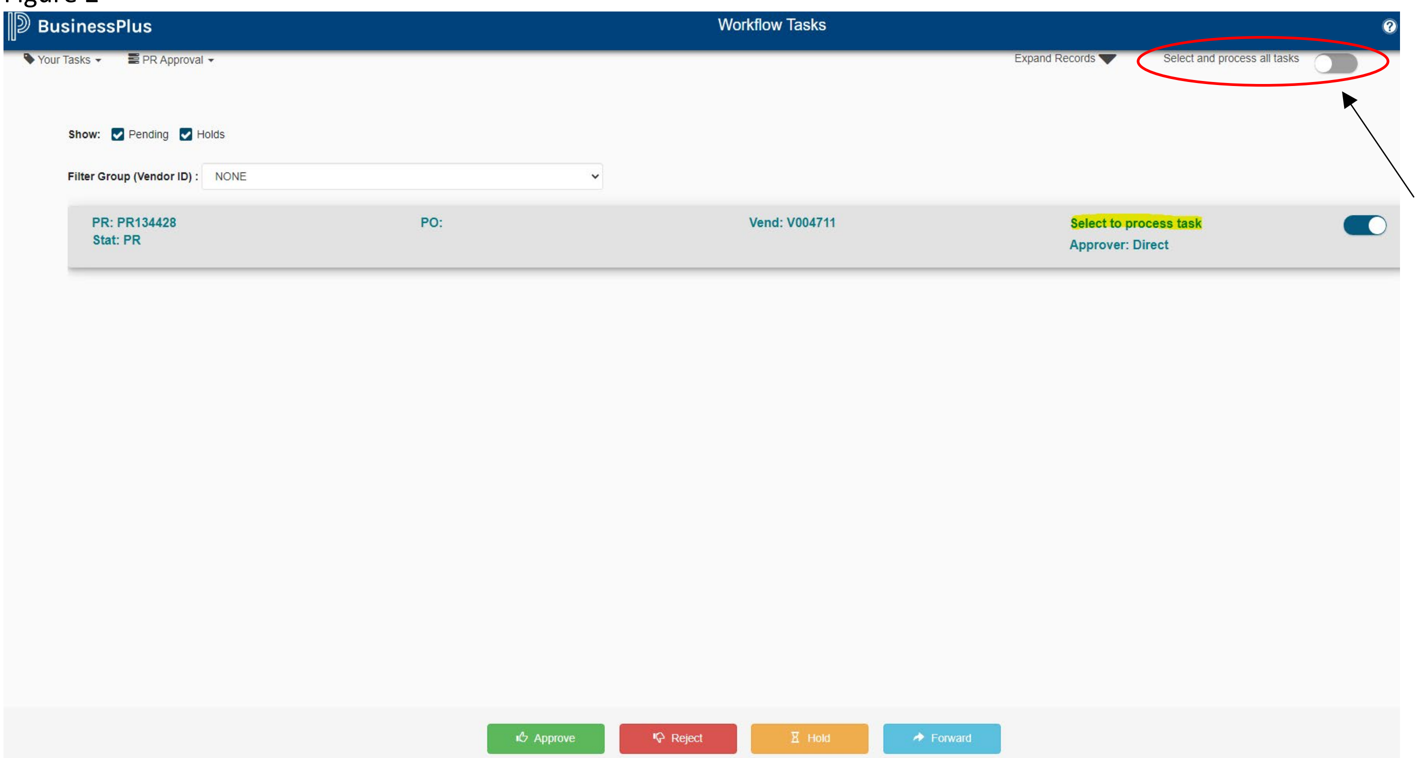
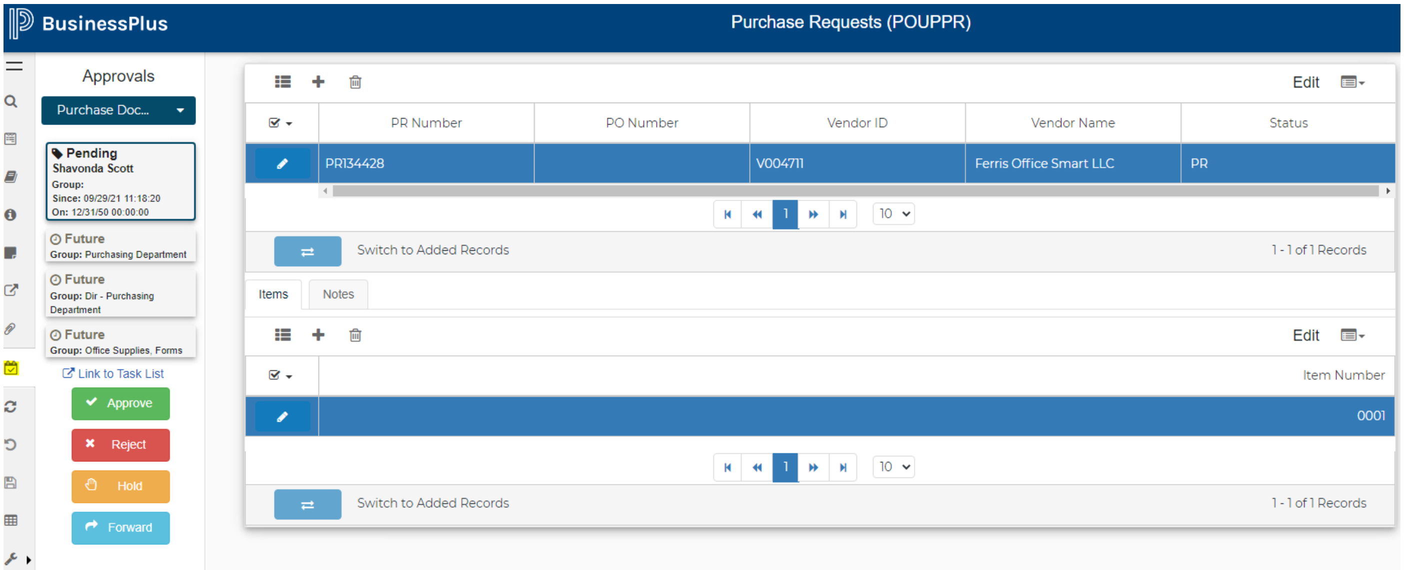
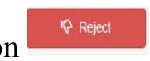


Figure 3



REJECTIONS

If the order contains errors or the order should be cancelled for any reason, click the reject icon 

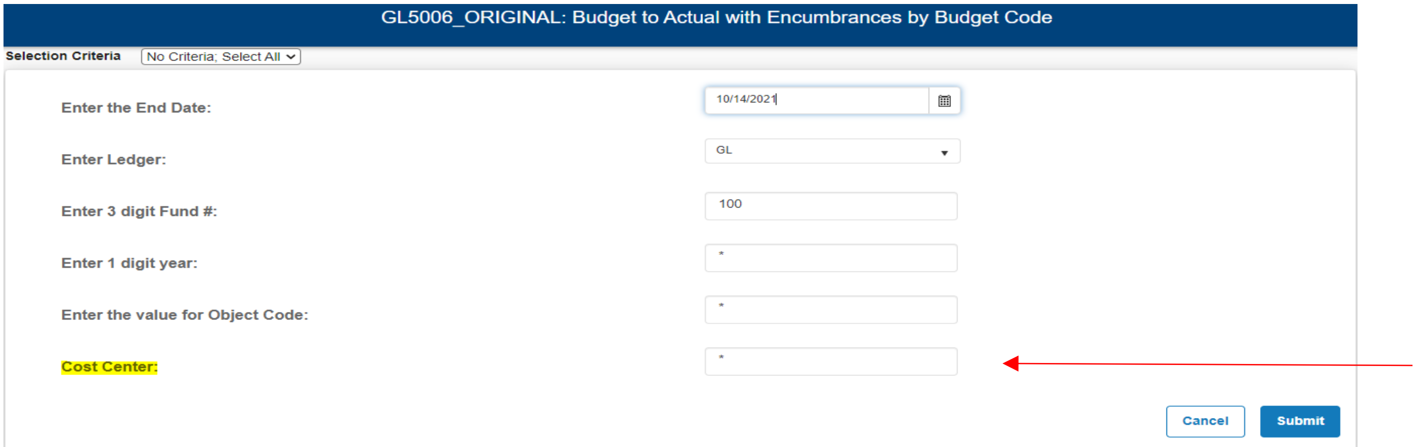
. A comment box will pop up and you will give a brief explanation of why the PR was rejected then click "Submit". The PR will return to the requestor's Workflow for correction or to begin the cancellation process. To cancel a PR, the requestor must reject the PR in Workflow then email Purchasing staff to request cancellation of the PR. Funds will be encumbered until the order is cancelled. Rejecting a PR in Workflow does not cancel the order. It only takes the PR out of the approval process so the secretary/bookkeeper can make the necessary revisions or so you can have it cancelled by Purchasing. Funds remain encumbered until the PR is cancelled by the Purchasing Dept. If a revision was made, the bookkeeper will resubmit that PR in Workflow to continue the approval process. There is no need to create a new PR as doing so would create a duplicate order and charge the account twice. If the requisition does need to be cancelled for any reason, you will still need to reject it and someone will need to email a Purchasing Staff member to cancel it so the funds will be credited back to the appropriate account.

Budget Reports

Check Balances & Transactions

From your dashboard, click on the Administrators/Principals tab and under "Reports" click "GL5006: Budget to Actual with Encumbrances by Budget Code". This is for General Fund and CEEF accounts only. Sandra Moody can give instructions on how to view your Title I Accounts.

When you see the pop-up box, remove the asterisk and type in ONLY your 4-digit school/location code in the location field. Leave other fields as they appear. Click “Submit” to view the budget report.



After you click “Submit” you should see a report similar to the example below:

CADDO Parish Production

Budget to Actual with Encumbrances by Budget Code

From 7/1/2021 To 10/14/2021

EXPENDITURES

ocatior	Object Ke	Budget Cod	Object Key Descriptio	Budget	MTD Actual	YTD Actual	Encumbranc	Balance
FUND: 1000			**GENERAL FUND**					
LOCATION	[redacted]		[redacted]					
	51100600	1100600	BUDOBJ-REG ED M&S/EQUIPMENT	19,096.66	0.00	0.00	0.00	19,096.66
	51100610	1100600	REG INST-M&S	0.00	0.00	0.00	0.00	0.00
	51100642	1100600	REG INST-TEXTBOOKS	0.00	0.00	0.00	0.00	0.00
		TOTAL LOCATIO!	[redacted]	**19,096.66**	**0.00**	**0.00**	**0.00**	**19,096.66**
		SUBTOTAL FOI	1100600	**19,096.66**	**0.00**	**0.00**	**0.00**	**19,096.66**
LOCATION	[redacted]		[redacted]					
	52252600	2252600	BUDOBJ-LIBRARY M&S	1,394.32	0.00	0.00	0.00	1,394.32
	52252610	2252600	I/S-SCH LIB/MEDIA-M&S	0.00	0.00	0.00	0.00	0.00
		TOTAL LOCATIO!	[redacted]	**1,394.32**	**0.00**	**0.00**	**0.00**	**1,394.32**
		SUBTOTAL FOI	2252600	**1,394.32**	**0.00**	**0.00**	**0.00**	**1,394.32**
LOCATION	[redacted]		[redacted]					
	52252641	2252641	I/S-SCH LIB/MEDIA-LIB BOOKS-ST	1,943.69	0.00	0.00	0.00	1,943.69
		TOTAL LOCATIO!	[redacted]	**1,943.69**	**0.00**	**0.00**	**0.00**	**1,943.69**
		SUBTOTAL FOI	2252641	**1,943.69**	**0.00**	**0.00**	**0.00**	**1,943.69**
LOCATION	[redacted]		[redacted]					
	52410600	2410600	BO-SCH ADM OF EXP	557.73	0.00	0.00	0.00	557.73
		TOTAL LOCATIO!	[redacted]	**557.73**	**0.00**	**0.00**	**0.00**	**557.73**
		SUBTOTAL FOI	2410600	**557.73**	**0.00**	**0.00**	**0.00**	**557.73**
		52600100	BUDOBJ-O&M-MAINTENANCE SAL		0.00	0.00	0.00	
		52610111	O&M-SPSVN-OFFCL/ADM/MGR SAL		0.00	9,540.02	0.00	
		52610114	O&M-SPSVN-CLERICAL/SEC		0.00	4,926.37	0.00	
		52620111	O&M-BLDG-OFFCL/ADM/MGR SAL		0.00	5,151.15	0.00	
		52620116	O&M-BLDGS-SVC WRKR SAL		0.00	169,523.37	0.00	
		52620117	O&M-BLDGS-SKLD CFRTMN SAL		0.00	133,619.49	0.00	
		52620124	O&M-BLDGS-SUB EMPL SAL		0.00	14,320.00	0.00	

Expenditure amounts are in blue. A hand icon will appear when you scroll over the expenditure amounts in the Encumbrance column. You may click (drill down) on those expenditures to see a list of purchase orders totaling the dollar amount. To get even more information, you may also drill down on any of the purchase order numbers on the list and get more details such as vendor name, order total, order status (receipt status, payments made, etc.) if needed. The "Encumbrance" column will show you all outstanding purchase orders that have not been paid or have been partially paid. The "YTD" column will show you a list of purchase orders that have been paid in full. **At the end of each fiscal year the bookkeepers/secretaries should always make sure the Encumbrance column shows $0.00 for each account to be certain there are no outstanding orders.**