BusinessPLUS 23.5 Finance Division Training

ST. LOUIS PUBLIC SCHOOLS

FINANCE DIVISION **5/12/23** **FY23 – FY24 School Year**

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ACCOUNT STRUCTURE

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POWERSCHOOL-BUSINESSPLUS

PowerSchool – BusinessPlus will replace SAP as the District's financial accounting system. The financial accounting system will allow real-time, accurate, and superior data access, streamline the District's accounting processes and easily manage fiscal information, monitor workflows and general ledgers, and more. The new system will provide the district an intuitive and easy way of managing daily fiscal operations so that concentration can go back into making informed decisions.

Business PLUS account Structure:

	FUND	FUNCTION	OBJECT	LOCATION	PROJECT	FY
GOB	110	1151	641101	1800	500200	00
GRANT	150	1251	641101	1800	451001	19

FUND CODES

The ***Fund*** is a 3 digit number that accounts for all transactions related to the operations of the District's activities.

$$\underbrace{110}_{\textbf{FUND}} – 1151 – 641101 – 1860 – 000000 - 00$$

FUNCTION CODES

The ***Function*** is a 4 digit number that describes the action, purpose or program for which activities are being performed. In the below example function ***1151*** represents ***High School*** program.

$$110 - \underbrace{1151}_{\textbf{FUNCTION}} - 641101 - 1860 - 000000 \text{ - } 00$$

- **BusinessPlus Function Codes:** The DESE function codes have not changed, however they are now visible in the account structure.

OBJECT CODES

The ***Object*** is a 6 digit number, formerly referred to as the G/L or commitment item, describes the type of expenditure.

$$110 - 1151 - \underbrace{641101}_{\textbf{OBJECT}} - 1860 - 000000 \text{ - } 00$$

LOCATION CODES

The ***Location*** is a 4 digit number describes the DESE assigned location code for school or building.

$$110 - 1151 - 641101 - \underbrace{1860}_{\textbf{LOCATION}} - 000000 \text{ - } 00$$

- **BusinessPlus Location Codes:** In most instances, the new location code is the old cost center 3 digit code with the addition of a zero e.g. location 186 is now 1860. There are a few locations that have changed completely (see crosswalk page 10).

PROJECT CODES

The ***Project*** is a 6 digit number that will replace the current SAP grant and internal order numbers.

$$110 - 1151 - 641101 - 1860 - \underbrace{000000}_{\textbf{PROJECT}} \text{ - } 00$$

FISCAL YEAR

The ***Fiscal Year*** is a 2 digit number that represents the fiscal year in which the budget is available. SLPS fiscal year is July 1 thru June 30.

$$110 – 1151 – 641101 – 1860 – 000000\ \underbrace{-\ 00}_{\textbf{FISCAL YEAR}}$$

General Operating Budgets (GOB) Accounts – The fiscal year will always appear as “00”

Grant Budgets – All grants should have a two digit number to represent the fiscal year in which the grant falls

ACCOUNT CROSSWALKS

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FUND CROSSWALK

The ***Fund*** is a 3 digit number that accounts for all transactions related to the operations of the District's activities.

GOB Funds	Grant Funds
110- General Funds	**140**- School Lunchroom
210- Teachers Funds	**150**- State and Federal
410- Capital Outlay	**160**- Fund Balance
	240- Teacher Lunchroom
	250- State and Federal Special Revenue
Other Funds	**260**- Grant Special Revenue
310- Debt Service	**440**- Capital School Lunchroom
923- Bond Fund	**450**- Capital
	460- Capital Fund Balance

OBJECT CROSSWALK

The ***Object*** is a 6 digit number, (formerly G/L or commitment item) describes the type of expenditure. For a complete list please visit the BusinessPLUS training and reference documents https://www.slps.org/Page/23540

The following table crosswalks the exceptions to this rule.

Former Commitment Name	New Object	New Object Name
General Supplies	641101	General Supplies

Former Location Name	New Object	New Object Name
Supplies-Technology < $1,000	641201	Computers, laptops and iPads < $1,000
Natural Gas Service	648201	Natural Gas Service
Electric Service	648101	Electric Service
Trip Allowance	634903	Trip Allowance
Field Trip Admission	639103	Field Trip Admission
Postage	636102	Postage
Gas And Oil	648601	Gas And Oil
Furn. Under $1,000	641109	Furn. Under $1,000
Software-Microcomputer	641202	Software-Microcomputer
Software-Mainframe	641202	Software-Mainframe
Computer Supplies	641202	Computer Supplies
Instructional Supplies	641108	Instructional Supplies
Operational Supplies	641103	Operational Supplies

LOCATION CROSSWALK

The ***Location***: 4 digit number describes the DESE assigned location code for school or building.

BusinessPlus Location Codes: In most instances, the new location code is the old cost center 3 digit code with the addition of a zero e.g. location ***186*** is now ***1860***. However, there are a few instances where the location code is completely different (see below)

Current Location Name	BusinessPLUS Location
Carnahan HS	1500
Clyde Miller Career Academy HS	1100
Gateway STEM HS	1220
McKinley CJA HS	1570
Nottingham CAJT HS	1222
Griscom Alternative HS	1015
Yeatman MS	2080

Complete list of location codes:

BusinessPLUS LOCATION CODES	LOCATION NAMES
0230	Adult Ed Apprentices
0260	Adult Basic Ed Coordinator
0280	Oak Hill Service Center
0360	Nottingham Com Ed Center
0420	Walbridge Com Ed Center
0450	Yeatman Com Ed Center
0490	Vashon Com Ed Center
1220	Gateway Inst of Technology
1222	Nottingham @ CAJT HS
1100	Clyde C. Miller Career Academy HS
1250	Beaumont High School
1510	Collegiate School of Medicine
1560	Metro Academic Classic HS
1570	McKinley Classical Leader
1680	Roosevelt High School
1730	Soldan Int'l Studies HS
1800	Sumner High School
1830	Vashon High School
1860	Central VPA High School

1500	Carnahan School of the Future
2770	Substitute Undistributed
2790	Surplus Undistributed
3050	Busch MS of Character
3070	Carr Lane VPA Middle
1570	McKinley CJA HS
3230	Gateway Middle School
3250	Academy Envt'l Sci/Math @ L'Overture
3260	Long Middle School
3390	Compton Drew ILC Middle School
2080	Yeatman-Liddell Preparatory Middle School
4000	Adams Elementary School
4060	Ashland Elementary School
4180	Bryan Hill Elementary School
4200	Buder Elementary School
4250	Ames VPA Elementary School
4400	Bertha Gilkey Pamoja @ Cole Elementary School
4420	Columbia Elementary School
4470	Dewey Int'l Study Elementary School
4660	Froebel Elementary School
4730	Gateway Elementary School
4780	Hamilton Elementary School
4880	Henry Elementary School
4890	Hickey Elementary School
4900	Herzog Elementary School
4920	Hodgen Elementary School
4960	Humboldt Academy of Higher Learning
4970	Nahed Chapman New Americans Academy
4990	Carver Elementary School
5020	Jefferson Elementary School
5030	Betty Wheeler CJA Elementary School
5060	Laclede Elementary School
5100	Lexington Elementary School
5180	Lyon Academy @ Blow
5240	Mallinckrodt ABI Elementary School
5260	Mann Elementary School
5340	Mason Elementary School
5500	Meramec Elementary School
5520	Gateway Michael Ortho Handicap

5560	Monroe Elementary School
5590	Mullanphy ILC Elementary School
5600	Oak Hill Elementary School
5610	Earl Nance Sr Elementary School
5620	Peabody Elementary School
5780	Shaw VPA Elementary School
5800	Shenandoah Elementary School
5860	Sigel Elementary School
5930	Stix Early Childhood
5960	Walbridge Elementary School
5970	Woerner Elementary School
6010	Washington Montessori
6030	Wilkinson ECC II
6120	Woodward Elementary School
1015	Griscom Alter School - Goodwill
6790	The Innovation Concept Alternative
6920	NCNAA @ Roosevelt
6980	Fresh Start
6990	SLPS Therapeutic School
8000	Board of Education
8020	Chief Academic
8030	Deputy Superintendent of Operations
8040	Chief of Staff
8100	Superintendent of Schools
8110	Deputy Superintendent
8120	Public Info & Communication Outreach
8140	State & Federal Program
8160	Education Officer - High
8190	Innovative Studies
8220	Alternative Ed/Student Co
8250	Leadership
8260	Vocational/Tech Education
8270	Community Education
8280	Special Education
8290	Special Services
8310	Deputy Office - Student
8330	Athletics Coordinator
8350	Career Education
8380	Bilingual / ESL Program

8390	School Partnership Program
8400	Early Childhood Education
8430	Accountability Office
8460	Parent Infant Interaction
8470	Teaching / Learning Support
8490	Recruitment/Counseling Ce
8510	Springboard to Learning
8800	Student Support Services
9050	Building Commissioner
9060	Food & Nutrition Services
9140	Student Records
9150	Materials Management
9180	Transportation Supervisor
9700	Treasurer
9720	Grants Management
9730	Development Officer
9740	Financial Management Office
9760	Budget, Planning, Development
9770	Fiscal Control Office
9780	Chief Financial Office
9790	Payroll Department
9810	Technology Services - MIS
9840	Research, Evaluation, Ass
9900	Human Resources
9910	St. Louis Plan

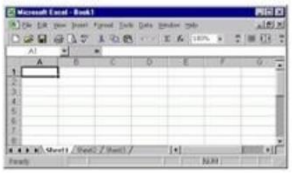
PROJECT CROSSWALK

The Project is a 6 digit number that have replaced grant and internal order numbers. Below are a few examples of project codes, to get a complete list please visit the BusinessPLUS training and reference documents https://www.slps.org/Page/23540.

Project Code	Project Code Names
451001	Title I-Schlwide
451003	Title I-EC
451005	Title I-PrntlInv
451010	Sch Imprvmt(SIG)
459001	21st Cent (CL)
500160	New Curriculum
500470	Love of Learning
500200	Attndnce Incntve

EXTRA SERVICE PROCESS & PAY AGREEMENT

Extra service will continue to be processed in the **“Old” SAP system** until the completion of the payroll implementation.

	• Once the extra service activity is identified by your location, funding must be appropriated. • An extra service spreadsheet must be completed prior to the extra service activity. • Forward your complete spreadsheet and extra service agreements to Budget Office (via budgetteam@slps.org) or Grants Management Office (email to individual analyst) for processing. • This is the same process you have followed prior to the implementation of Business Plus and will continue to follow.
	• Budget or Grants Management staff will review and approve the extra service request. • Once approved, you will receive notification that the spreadsheet is loaded. • After notification of upload and the employee has completed the extra service, time must be reported to payroll on an electronic timesheet.
	• The Extra Service Time Sheet is located on the SLPS website under the payroll tab. • This is the only timesheet that payroll will accept. • The Extra Service Timesheet will need to be submitted to payroll in order for the employee to receive payment. • Once complete, forward the electronic timesheet to payroll@slps.org. • The keying of extra service in SAP will no longer be entered at your location.
	All Schools or Central Office locations must submit the Extra Service Timesheets to payroll@slps.org no later than the end of business on Friday for the week that the service was completed.

GENERAL BUSINESSPLUS NAVIGATION

HOW TO LOG INTO BUSINESSPLUS

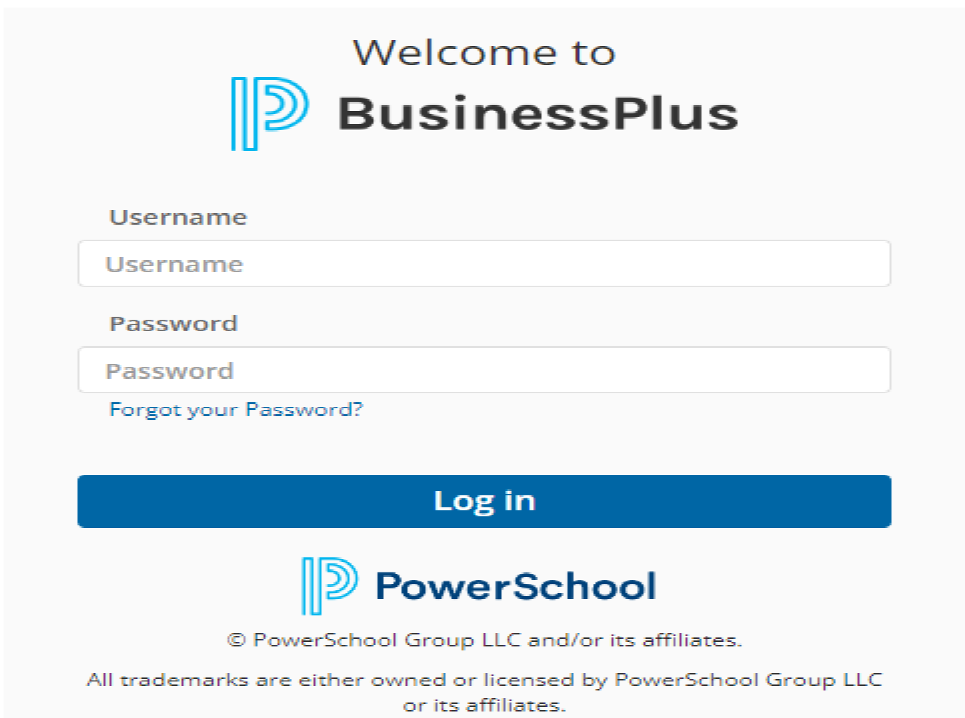
1. Login into BusinessPLUS by accessing either

   internet browser, then enter the following address:

   Please note: BusinessPlus can be accessed in any browser.

   [BusinessPlus | PowerSchool (slps.org)]

2. On the **Login Screen**, Enter your User Name in the **User Field**; Enter your Password in the **Password Field**; Click on the **Log-in button**



BUSINESSPLUS NAVIGATION BAR

Navigation Bar

	Selecting the PowerSchool BusinessPlus logo opens the BusinessPlus dashboard page.
	Selecting the Help icon opens page-related information in a new browser window.
	Click the magnifying glass icon to access the search field. Users can search by BusinessPlus mask. As information is entered, suggested results are displayed below the search field. To open a mask, the user can select a suggested mask or hit Enter in the search field.
UN	Contains the initials of the user currently signed in. Clicking the icon displays: • NU User name and ID • Change Password — Redirects to Change Password page where the user can create a new password. The new password cannot be the same password used within the last 30 days. • Sign Out
Menu	Click the menu icon to display the BusinessPlus menu. Presented menu options are based on user security permissions.

Page Menu Options

Symbol	Name	Description
	Expand / Minimize	Expand or minimize the page menu.
	Search	Enable Search mode. Entered selection criteria appear under "Search Criteria," listing the page or tab name. Click the X to remove.
	Advanced Search	Save entered selection criteria. Must be in Search mode to display this option.
	Records	Display selected record(s) in Grid or Single Record view.
	Field Help	Display field-related database information in lower right corner of the page. **Custom Field Help** can be managed by selecting the pencil icon on the field help window.
	About	Displays release, user, server, connection and Web browser information.

	Threaded Notes	Displays saved threaded notes. Selecting a saved note or the "Add New Thread" button opens the Update Generic Text (SYUTTXUP) page, filtered based on the screen the user came from, to manage threaded notes. User must have required security to view all information.
	Screen Links	Displays links to related screens, if available. A total of 12 shortcuts and screens links can be displayed at a time in the side panel. Allows your district to define Customized Shortcut Links on user screens and populate selection criteria from the current record.
	Attachments	Displays Documents Online attachments, if any. Valid user permissions and at least one attachment definition need to be in place for this functionality to work. If more than one attach definition exists for a given page, select the correct attach destination from the drop-down before attaching the file. To attach a file, select "Add New Attachment." Use the search field to search for a specific attachment (type).
	Reload Record	Reloads the current record.
	Revert Changes	Reverts all changes since the record was last saved. If no changes were made, the option is grayed out.
	Save Changes	Save changes. If no changes were made, the option is grayed out.
	Export to Excel	Opens the Export to Excel window from which users can select what data to export to Excel.
	Tools	Screen-specific tools appear in **bold.** Standard screen tools: **Ledger Settings** — Change ledger preferences. GL Ledger reads from GLUPGN. **User Settings** – The Workflow Approval panel can remain open as users navigate between pending records within a page when this is enabled. This is disabled by default. **View Last Changes** — Displays most recent set of changes. **Data Dictionary** — Formerly called "Consolidated Field Help." Displays database information for all page fields. Option to export data to .csv file.
	Layout Management	Enables users to select or create district page layouts for the selected screen. Up to 5 district-defined layouts are available, per screen. **Start Designer -** Places screen in layout update mode and allows user to remove and re-order fields. **Undo Layout -** Reverts layout changes to stock layout. **Remove Default Layout** - Resets default layout to the stock layout. **Manage Layouts** - Select, create, edit, or delete district layouts. Options are restricted by user association.
	Reports	Allows your district to define CDD reports on user screens and populate selection criteria from the current record.

Page Overview

Pages open in Search mode. The user can return all available records or apply selection criteria to narrow down the search results. From this page, the user has access to the Advanced Search page where they can save selection criteria for reuse.

The search function returns selected records on the Records page in Grid view. If the selected records cannot be displayed on a single page, page controls are added to view additional results pages. In Grid view, the user can edit, add or delete records, select which columns to display for the search results, change the sort order, or switch to Single Record view.

In Single Record view, required fields are marked with a red * (asterisk) and the field labels are bold.

Menu options on the left side of the page are different for Search mode or Record View. See Page Menu Options for detailed information.

Single Record View Controls

Symbol	Description
	Switch to Grid view.
	Go to previous record. If there are no previous records, this button is blocked.
	Go to next record. If there are no additional records, this button is blocked.
	Add a new record.
	Back to grid from Add mode.
	Delete current record.
	Copy current record.
	Paste record.
	Select page sort option. Business rules (NUUPDF) can be applied to screens and sort options. Use the Record Info link to view record data and log history. Use Copy Record to copy the current record.
	Switch to Added Records.

Grid View Controls

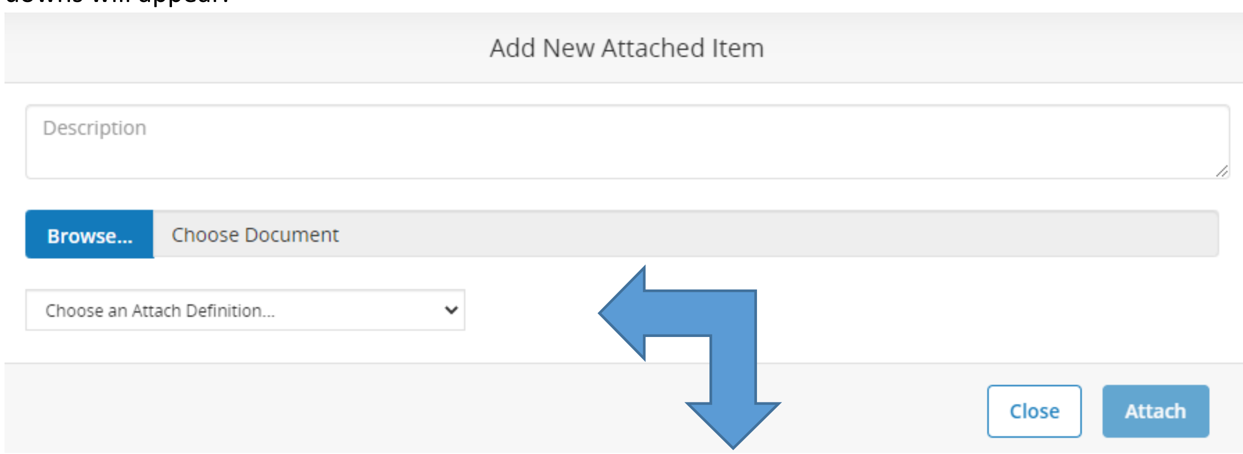
Symbol	Description
	Switch to Single Record view.
	Select which columns to display in search results.
	Place the cursor on the grid column separator to display the column resize icon. Click and hold, then drag horizontally right or left to resize the column width. The system saves the change and applies it when you visit the page. Select Restore to revert to default column width.
	Switch to Added Records.
	Edit the selected record in Edit mode.
1 2 3 4 5	Use the arrows or page numbers to view additional search results.
10 ▾	Select the number of rows to display in the Search results window. Options are 5, 10 and 20.
1 - 10 of 239 Records	Informs the user which subset of records out of the total number of records is currently displayed.

HOW TO ADD AN ATTACHEMENT FEATURE IN BUSINESSPLUS

1. From the "**School/Department**" tab, Click on "**Enter Purchase Requisition – POUPPR**" link, and the Purchasing - Purchase request screen will appear
2. On the left-hand side of the screen under Menu you will see the following:

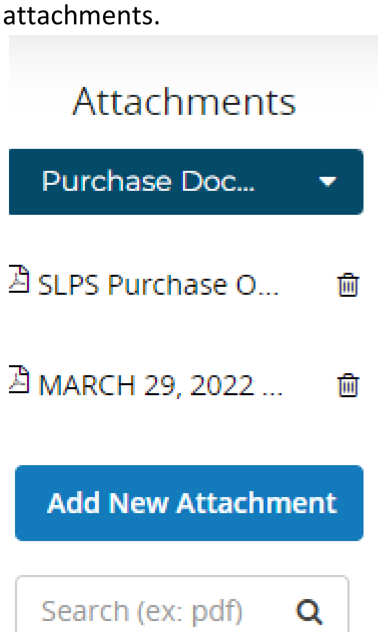
   Attachments

4. Click on "**Attachments**", then click on the Add New Attachment tab and the below drop downs will appear:



Always attach documents internally: Purchase Request Internal - Purchase Document

5. Select "**Attach**" after you have filled in the necessary information to have the ability to see attachments.

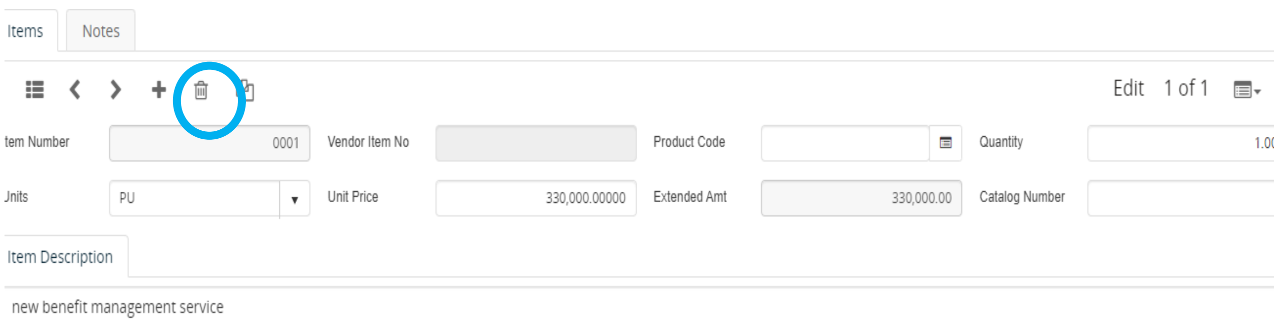


HOW TO DELETE A REQUISITION LINE IN BUSINESSPLUS

There is no maximum number of lines on a requisition:

How to delete a requisition line:

1. Within the Purchasing - Purchase request screen, highlight the line that you would like to delete
2. At the middle of the screen under the “Items” tab , click on the “Trash Can” icon
3. Select Yes/No under “Confirm Delete”, and the record will be deleted



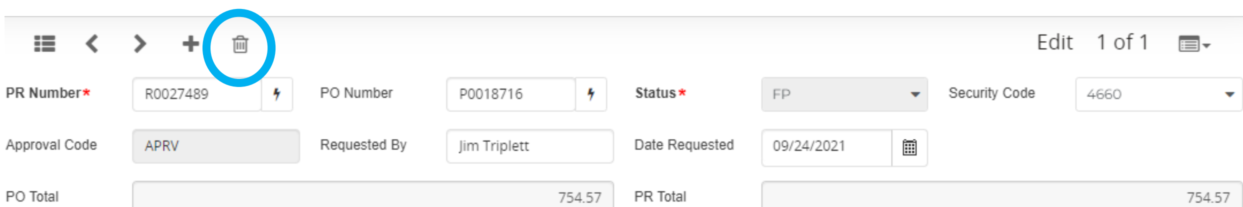
HOW TO DELETE A REQUISITION IN BUSINESSPLUS

There are instances when a purchase requisition can be deleted completely:

- The creator can delete a requisition **<u>prior to approving</u>** (clicking the green approval bar) the requisition, once the creator approves they will not be able to delete the requisition
- If a requisition is declined and sent back to the creator, it can also be deleted

How to delete an entire requisition:

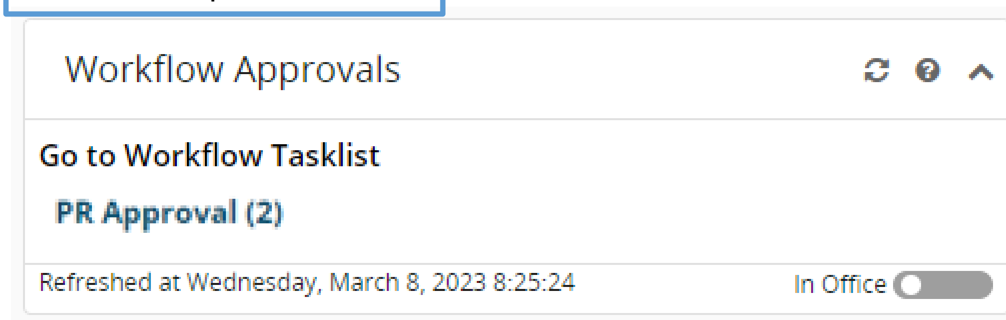
1. Within the Purchasing - Purchase request screen, click on the “options” icon at the top of the screen



2. Select Yes/No under “Confirm Delete”, and the record will be deleted

HOW TO CHECK THE APPROVAL STATUS (APPROVE VS REJECT)

Schools / Departments Tab

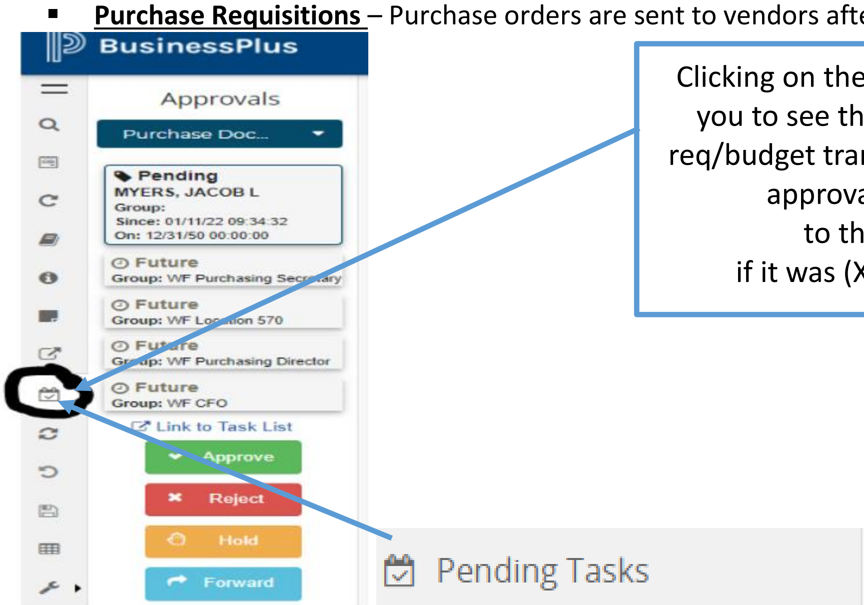


The Workflow Approvals box will display any pending tasks for approval. Click on the link "PR Approval" to display detailed information

EXAMPLE OF A WORKFLOW APPROVAL IN BUSINESSPLUS

A budget transfer or purchase requisition is completely approved once all levels have approved in BusinessPLUS

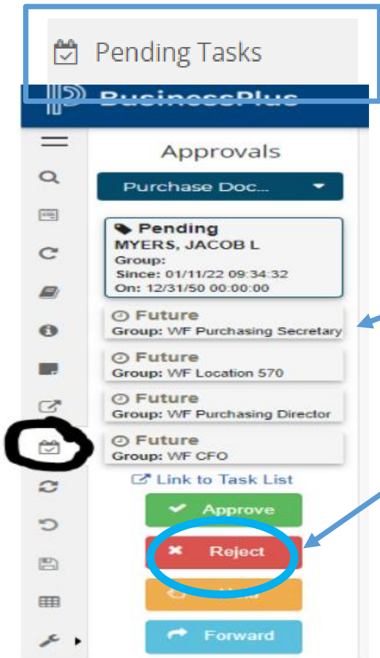
- **Budget Transfers** – Funds are available after the final approval level
- **Purchase Requisitions** – Purchase orders are sent to vendors after the final approval level



Clicking on the "Pending Tasks" tab will allow you to see the status approval level of the req/budget transfer. It will also show you each approval level from the creator to the final approver, and if it was (X) declined by an approver

EXAMPLE OF A WORKFLOW REJECTION IN BUSINESSPLUS

A budget transfer or purchase requisition can be declined for several reasons e.g. wrong funding, wrong object code, unallowable expenses and therefore someone in the approval process declines the request.



Indicates that the transaction has been **declined**, you will be able to see why the approver declined the request and comments

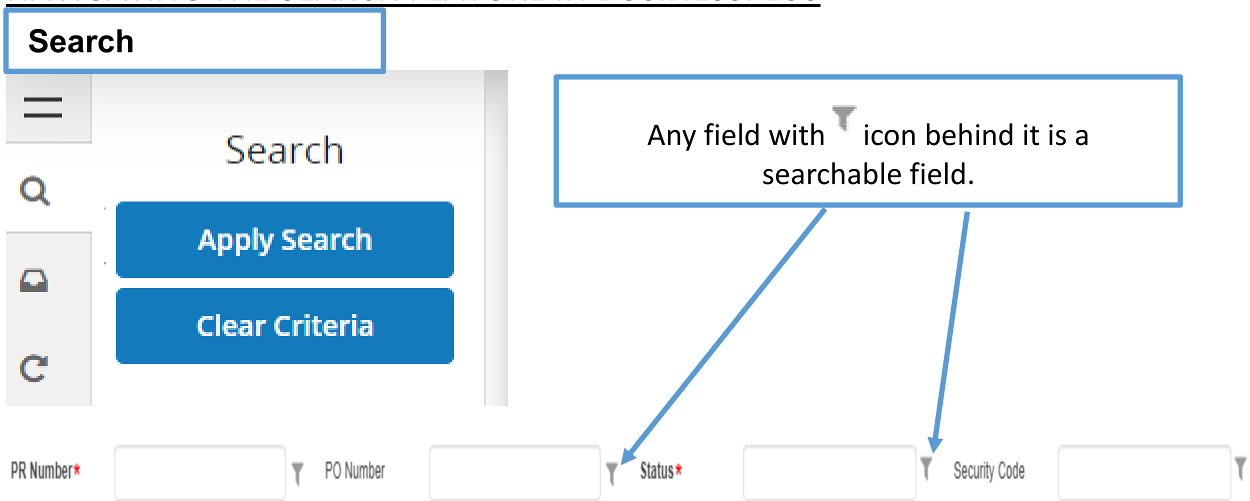
You have to be in a selected module (i.e. **Budget Transfer or Purchase Req**.) to review the rejection comments under "Pending Tasks"

Sample of a declined requisition with Comments

KMCKENZI	✕	07/26/18 11:02:07	Kevin Mckenzie	07/27/18 08:13:19	WF Fiscal

The correct account to charge for this item is now 641202 - Technology Supplies under $1,000. Account 641201 is now used for Computers, Laptops, iPads, and Tablets with a unit cost under $1,000.

NAVIGATING THE SEARCH FEATURE IN BUSINESSPLUS

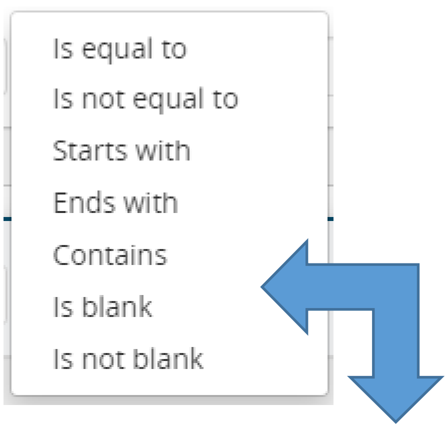


HOW TO USE FIND/SEARCH FEATURE FOR

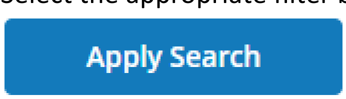
To perform a “find and search”:

1. At the top of the screen, click on the magnifying glass on the **left side of the screen**

2. Click on **<u>any field within any module</u>** with the behind it – this will put you into the “filter” mode:



3. Select the appropriate filter based on the information you entered in the blank field and hit



to return your search results.

PROCUREMENT

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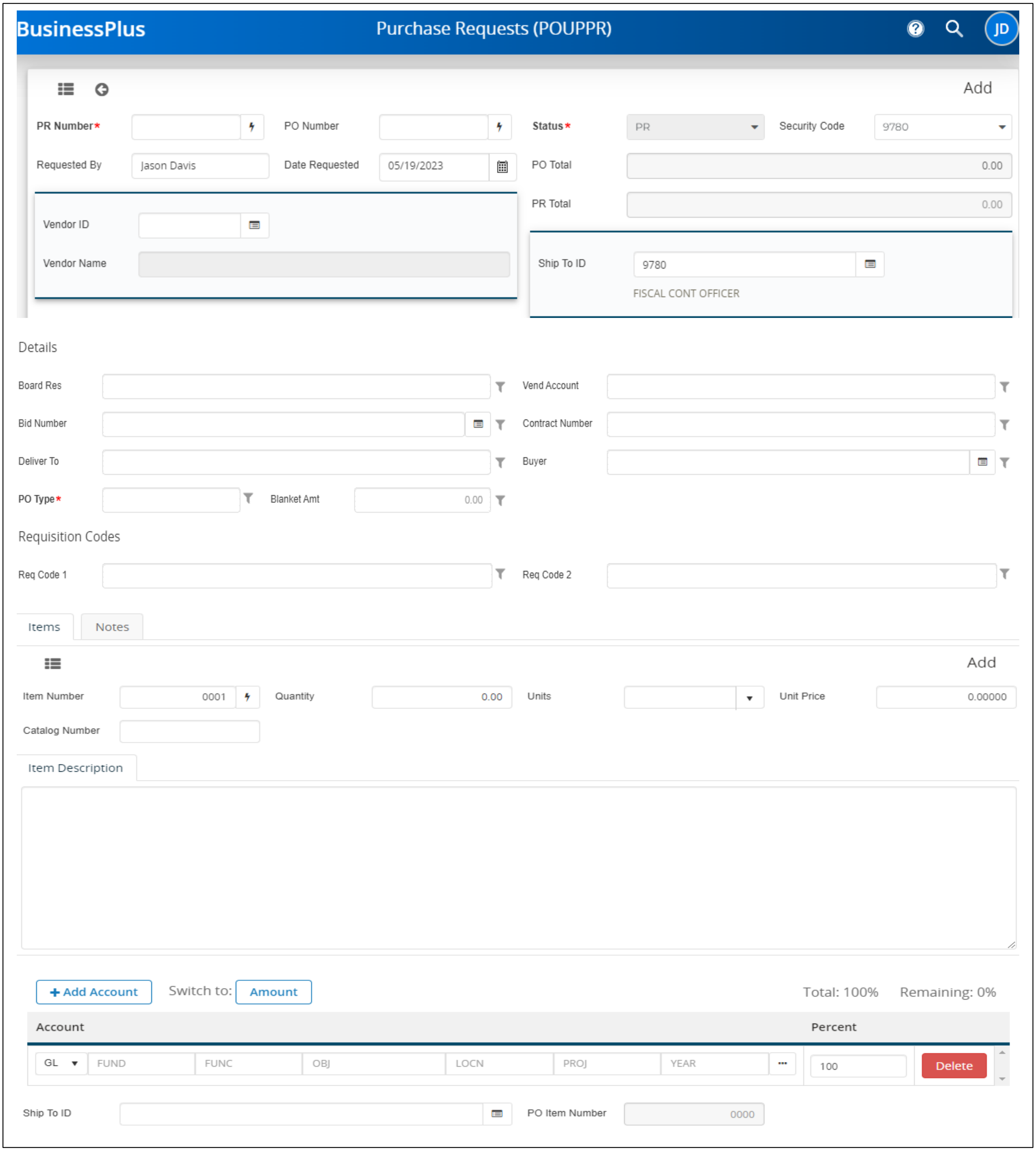
PROCUREMENT TRANSACTIONS TYPES

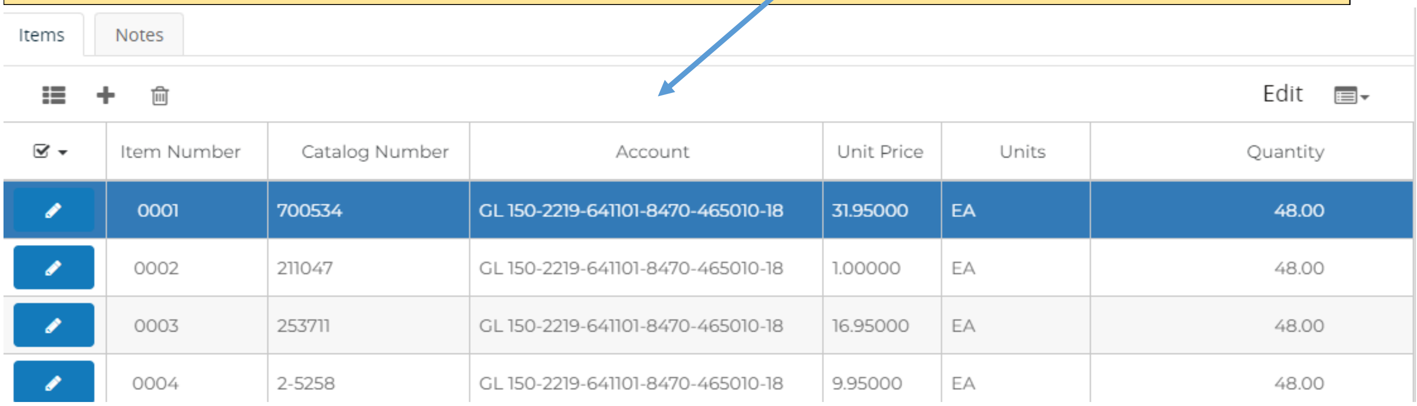
Transaction	Module	Explanation
CMUPCM – Create contracts and Amendments	**Contract Management**	**Used to enter requisitions that have a contract *(physical document that requires signature from 2 or more parties*) associated with the expenditure. E.g.: Professional Development Services, Service Agreements, Maintenance Services, DJ Services, Workshops, etc. *NOTE: REQUIRES A SIGNED INVOICE FOR PAYMENT**
POUPPR – Enter Purchase Requisitions	**Purchase Requisition (General)**	**Used when creating general requisitions for supplies, technology purchases, furniture, computers, etc. *NOTE: REQUIRES GOOD RECEIPT (POUPRC) FOR PAYMENT**
POUPPR – Enter Purchase Requisitions	**Purchase Requisition (Blanket)**	**Used when creating requisitions that require multi- lists such as, library books, maintenance and custodial supplies, textbooks and services that aren't contract related. *NOTE: REQUIRES A SIGNED INVOICE FOR PAYMENT**
POUPRC – Receive on Purchase Order	**Receive on Purchase Order**	**Used when receiving on items ordered through the general requisition process**

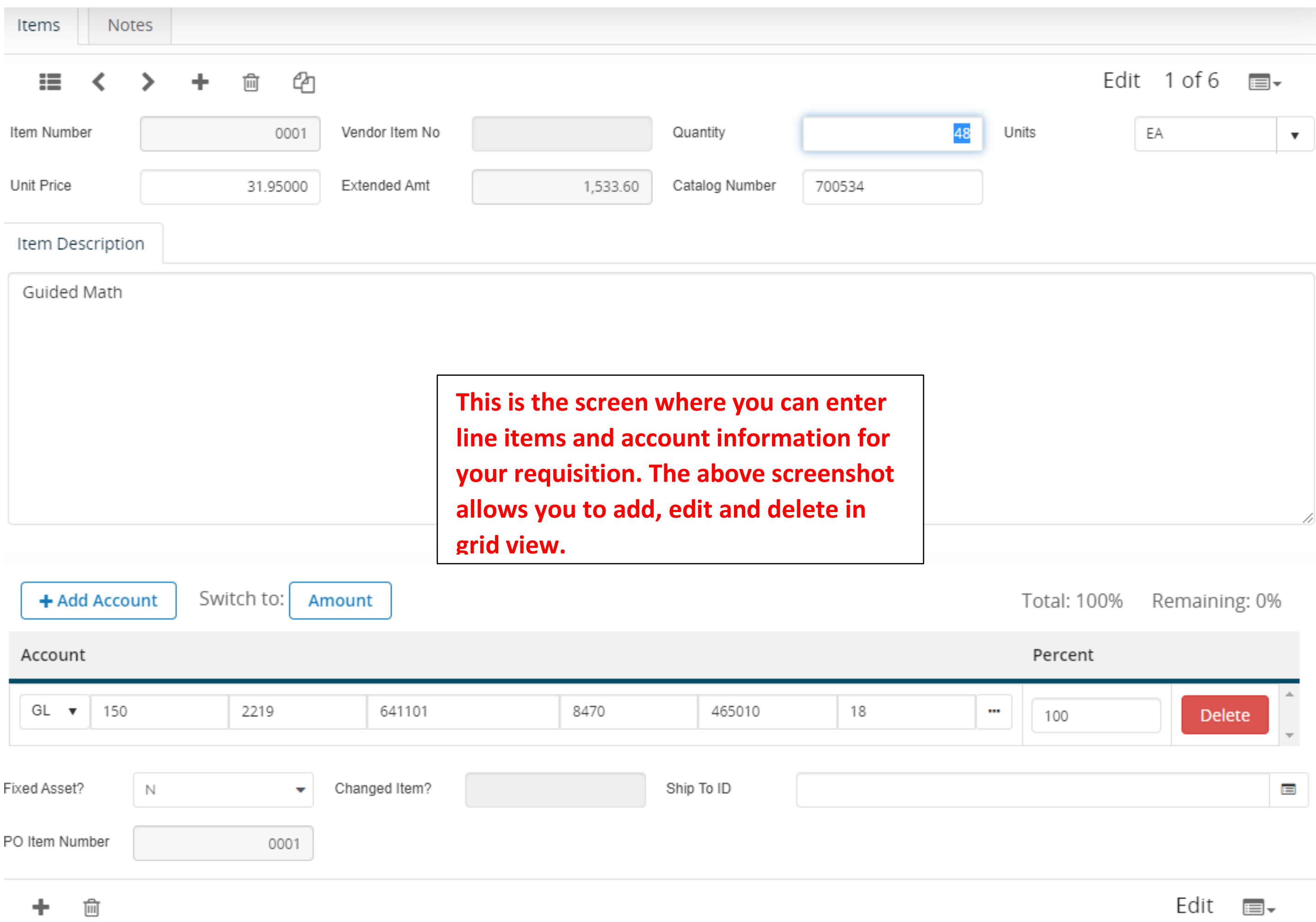
PURCHASE REQUISITION SCREEN REVIEW



PURCHASE REQUISITION SCREEN REVIEW CONT'D

Please note: The order of your categories on the items tab in Grid mode is based on the user's preference and can be changed in any order by left clicking the mouse and dragging the categories to new location



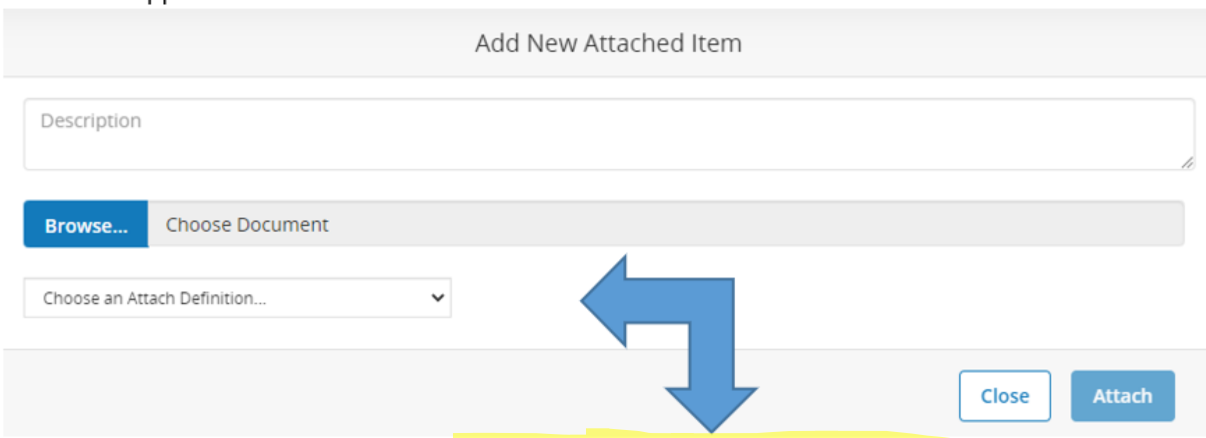


This is the screen where you can enter line items and account information for your requisition. The above screenshot allows you to add, edit and delete in grid view.

REQUISITION ENTRY TIPS

- Multiple GL accounts can be used on a requisition except when using a PunchOut vendor
- External vs. Internal attachments:

Click on "**Attachments**", then click on the **Add New Attachment** tab and the below drop downs will appear:



Always attach documents internally: Purchase Request Internal - Purchase Document

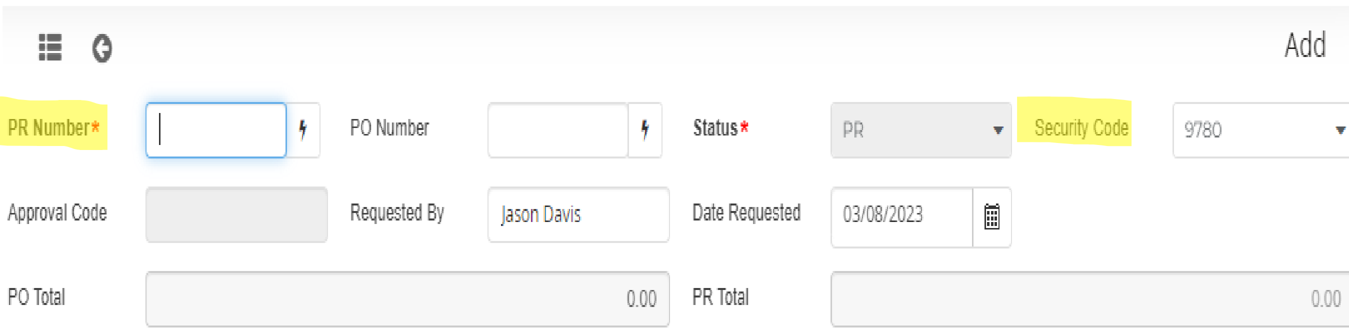
Select "**Attach**" after you have filled in the necessary information to have the ability to see attachments.

- "Receiving on purchase - POUPRC"
    - **General Requisition** – **REQUIRED** to receive on general requisitions in order for the vendor to be paid
    - **Blanket Requisition** – **NOT** necessary to receive on requisitions that were entered as PO Type: B (Blanket)
    - **Contract** - **NOT** necessary to receive on requisitions that were entered as PO Type: C (Contract)
- All requisition(s) **MUST** have a quote attached except when using PunchOut
- Shipping Charges:
    - No shipping charges - Select Req. Code NS – No shipping charges
    - Shipping Charges – must be added on the purchase requisition

HOW TO CREATE A PURCHASE REQUISITION

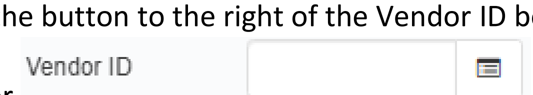
A purchase requisition is used when seeking to purchase general supplies, technology purchases, furniture, etc.

1. Log into BusinessPLUS through **any browser**
2. Under the School/Department tab, click on **"Enter Purchase Requisition – POUPPR"**, and the below screen will appear: If necessary, click on the icon to populate a blank entry screen and this should now display the word **"Add"** in the top right corner

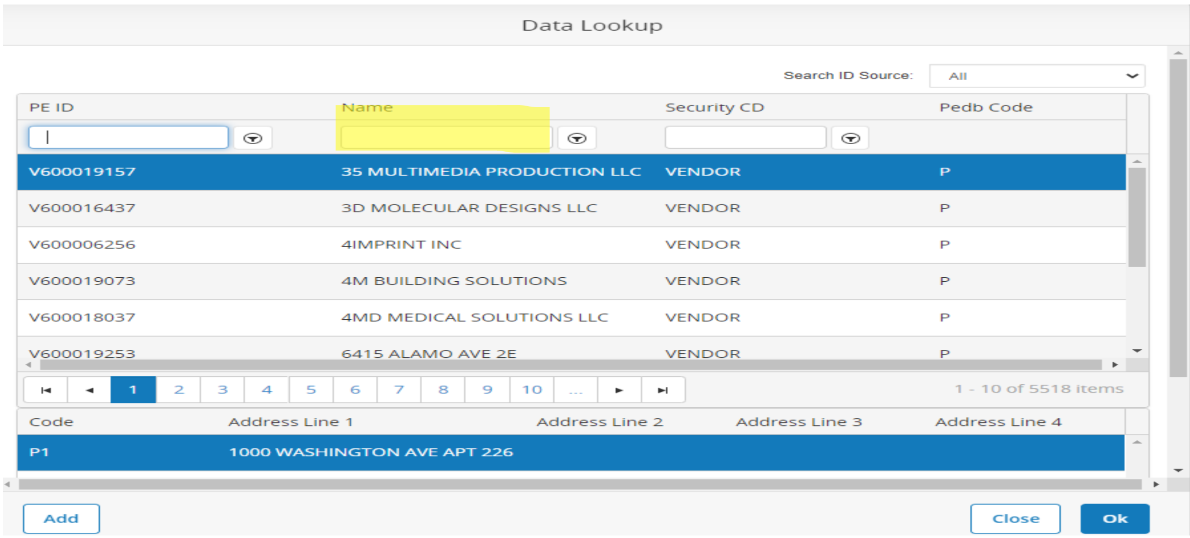


3. To assign a PR: **Requisition number**, click the lightning bolt , and select "**Auto [PR.SEED}**"

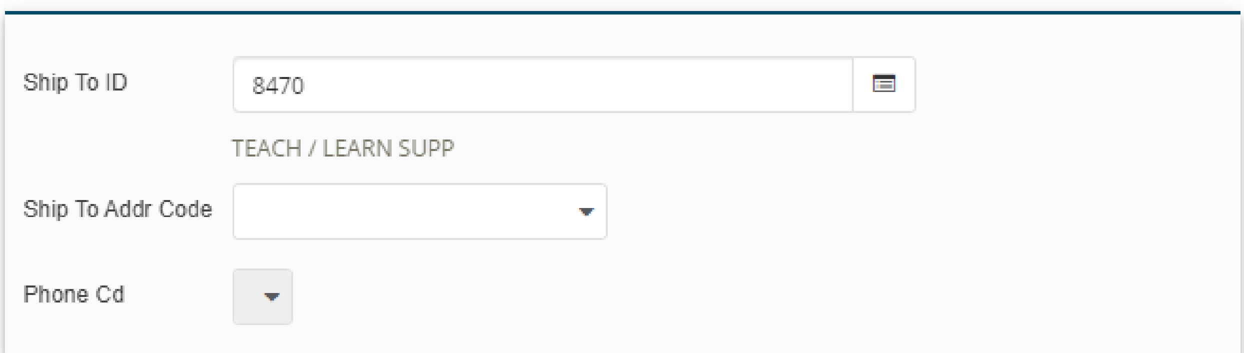
4. Reminder to leave the **PO Number** blank. This will autogenerate upon final workflow approval.
5. On the **Security Code** please verify it matches the assigned location you are completing the requisition if you are assigned to multiple locations.
6. On the **Requested By and Date Requested Field,** this information will auto populate. **DO NOT CHANGE.**
7. To select a vendor: Click on the button to the right of the Vendor ID box on the vendor field and click to find a vendor



a. The below screen will appear, enter a portion of the vendor's name, the system will display names matching the characters entered. Select the appropriate vendor by

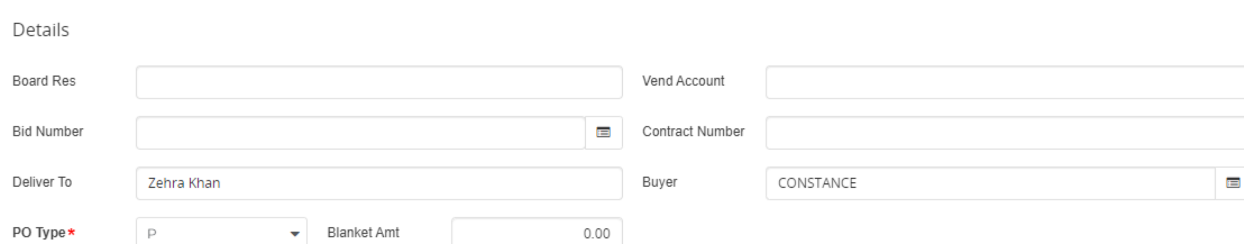


highlighting and clicking "OK" or double click on the vendor name.

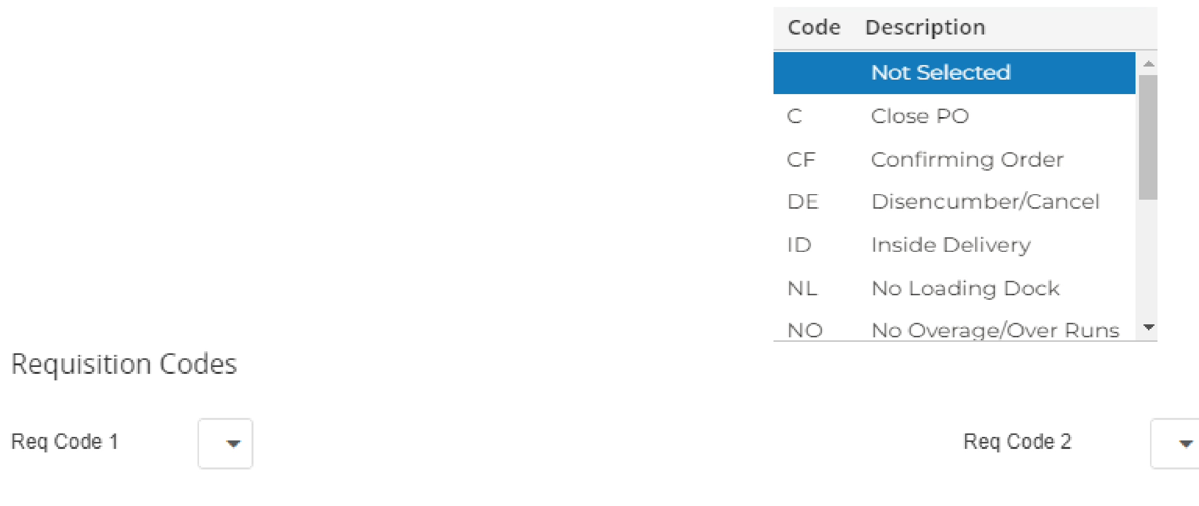


8. In the "**Ship To ID**" section a user can specify the location an order is sent.

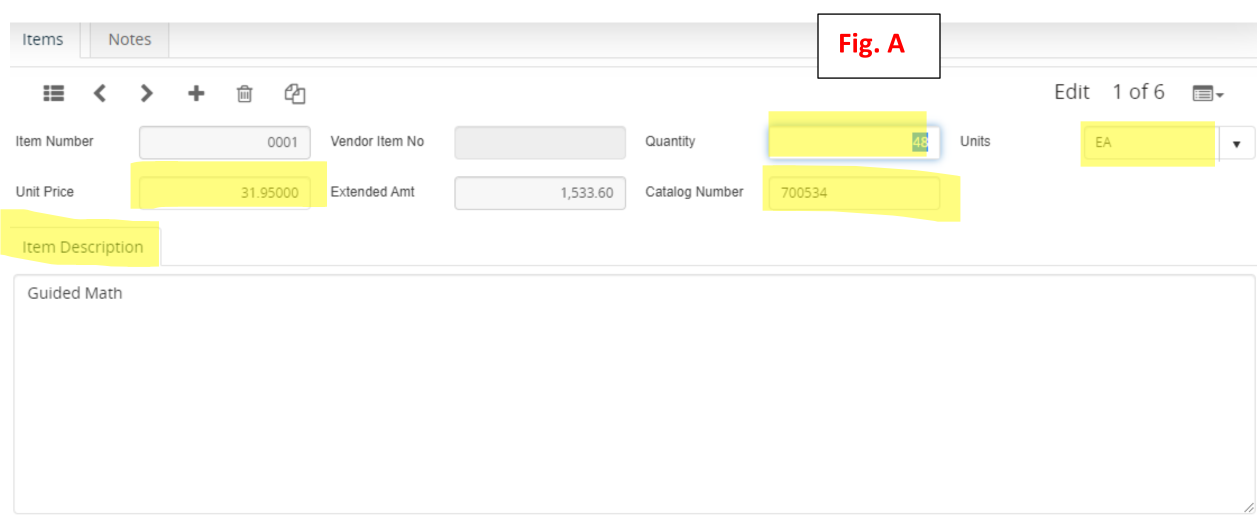
9. On the **Details,** section enter all applicable information:



10. Do not enter anything in the **"Blanket"** amount unless completing a Blanket Requisition see pg. 38 ***How To Create A Blanket Purchase Order (PO)***
11. On the **Req. Codes** section, select appropriate req codes, if none applies then you should leave blank.



12. On the **Items tab**, (Fig. A) populate the below information :
13. Enter **Notes** (Fig. A), if applicable by clicking on the "**NOTES**" tab



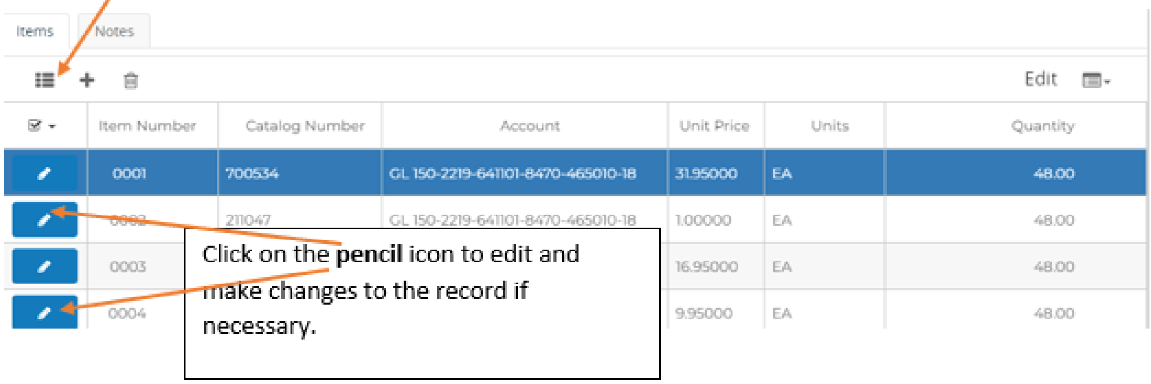
A. The **Item Number** will auto populate -**DO NOT CHANGE**
B. Enter the **Quantity** number, this field is ***required by the purchasing department***
C. Select the **Units** from the drop down option, this field is required by the purchasing department e.g. each, box, pack or power unit

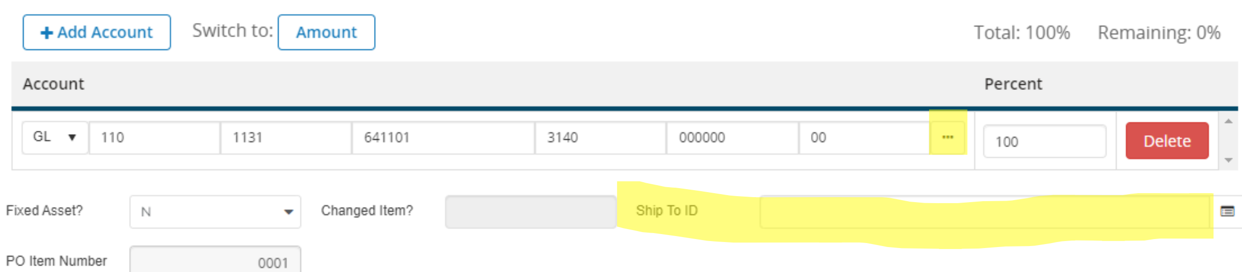
D. Enter the **Catalog Number,** If applicable

E. Enter a brief **Description** of the item you are purchasing**,** this ***field is required by the purchasing department***

F. Enter the **Unit Price of** the item you are purchasing**,** this ***field is required by the purchasing department***

Click the icon to toggle views from grid mode to expand/entry mode(Fig. A) on page 34.





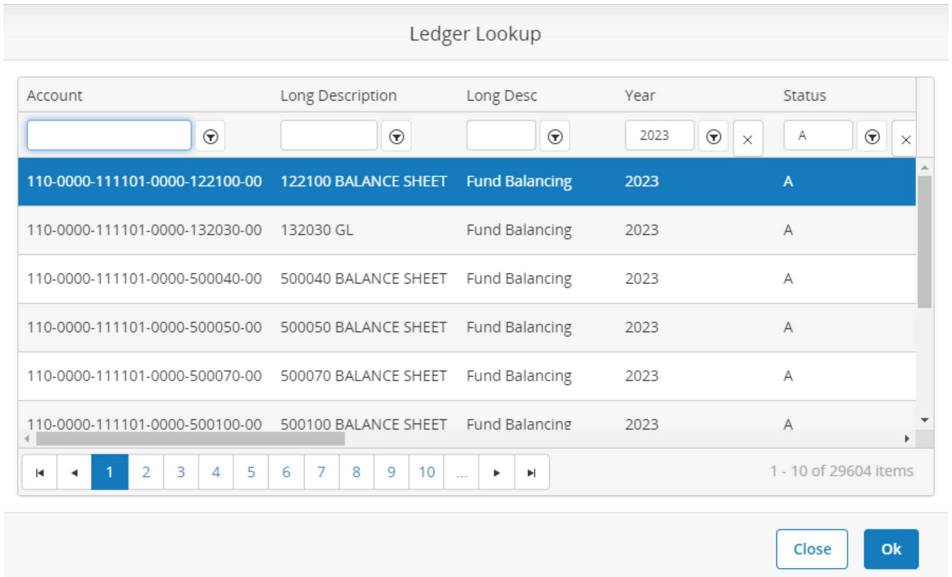
"Ship To ID": You can ship line items to different locations by populating this field.

G. Enter or select the **Account** information for the Lookup account option:

a. Click on the ellipses button ..., and click on "Lookup Account"

b. The below screen will appear:

i. If you enter known selection criteria ***<u>e.g. project code, function, fund, location, object code</u>*** only the account codes for that specific code will appear



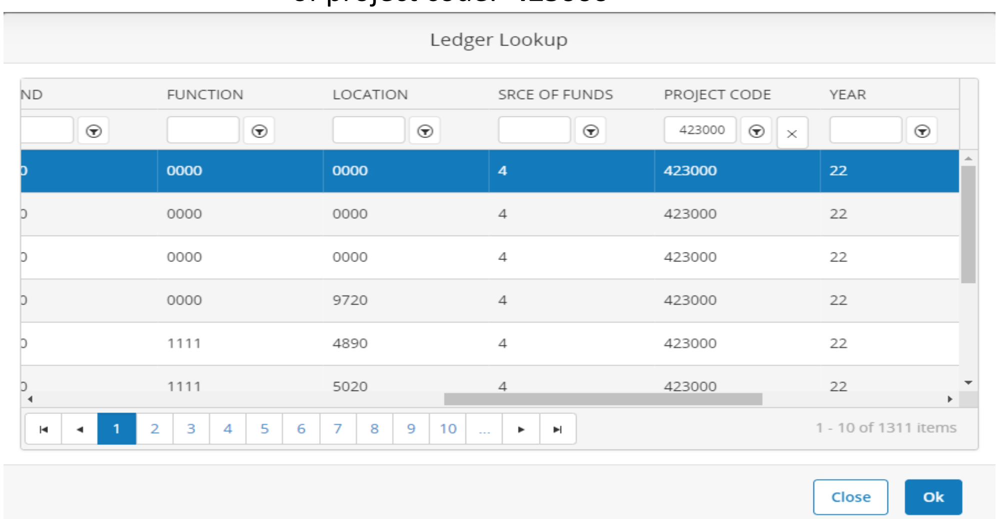
Ledger Lookup

Account	Long Description	Long Desc	Year	Status
			2023	A
110-0000-111101-0000-122100-00	122100 BALANCE SHEET	Fund Balancing	2023	A
110-0000-111101-0000-132030-00	132030 GL	Fund Balancing	2023	A
110-0000-111101-0000-500040-00	500040 BALANCE SHEET	Fund Balancing	2023	A
110-0000-111101-0000-500050-00	500050 BALANCE SHEET	Fund Balancing	2023	A
110-0000-111101-0000-500070-00	500070 BALANCE SHEET	Fund Balancing	2023	A
110-0000-111101-0000-500100-00	500100 BALANCE SHEET	Fund Balancing	2023	A

1 2 3 4 5 6 7 8 9 10 ... 1 - 10 of 29604 items

Close Ok

ii. Accounting information for a location, with the selection criteria of project code: **423000**

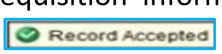


Ledger Lookup

ND	FUNCTION	LOCATION	SRCE OF FUNDS	PROJECT CODE	YEAR
				423000	
	0000	0000	4	423000	22
	0000	0000	4	423000	22
	0000	0000	4	423000	22
	0000	9720	4	423000	22
	1111	4890	4	423000	22
	1111	5020	4	423000	22

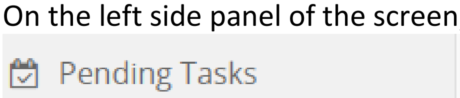
1 2 3 4 5 6 7 8 9 10 ... 1 - 10 of 1311 items

Close Ok

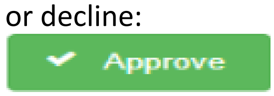
14. Once the requisition information is added, press "enter" from your keyboard, "record accepted"  will appear

HOW TO APPROVE PURCHASE REQUISITION IN BUSINESSPLUS

On the left side panel of the screen, click on the "Pending Task" tab



to approve or decline:

a) To approve the requisition, click the  icon, the requisition will then route to the next line of approval.

b) To decline the requisition, click the 

icon, and the requisition will be rejected.

c) To place the requisition on hold, click the 

icon, and the requisition will be hold. **Finance Department use only.**

d) To delegate or reassign the requisition, click the 

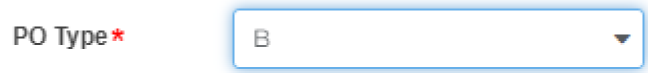
icon, and the requisition will be forwarded to another user. **Finance Department use only.**

HOW TO CREATE A BLANKET PURCHASE ORDER (PO)

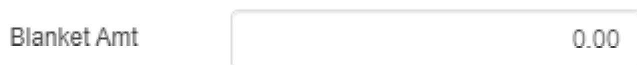
A ***blanket order*** is a ***purchase order*** the requestor makes with its supplier, which may contain multiple delivery dates, scheduled over an agreed period of time, often negotiated to take advantage of predetermined pricing. Blanket purchase order use may be restricted by Department needs. Normally used when there is a recurring need for expendable goods such as library books, custodial maintenance supplies and textbooks.

Follow steps 1 – 14 on "HOW TO CREATE A PURCHASE REQUISITION"

15. On the Details section, change the PO type to "B", which represents Blanket



16. Click on Blanket Amt section, and enter the total dollar amount of the Blanket requisition:



17. Once the changes are made, hit the "enter" key from the keyboard to save the changes, record accepted" Record Accepted will appear.

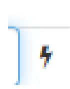
HOW TO CREATE A CONTRACT REQUISITION

A contract requisition is used when seeking professional services, service agreements, maintenance services, professional development workshops, etc. Entering a contract in BusinessPLUS is a **two-step process.** The contract should be first created in the **Contract Management – CMUPCM** screen, and then approved in the "**Enter Purchase Requests– POUPRC**" screen.

STEP 1

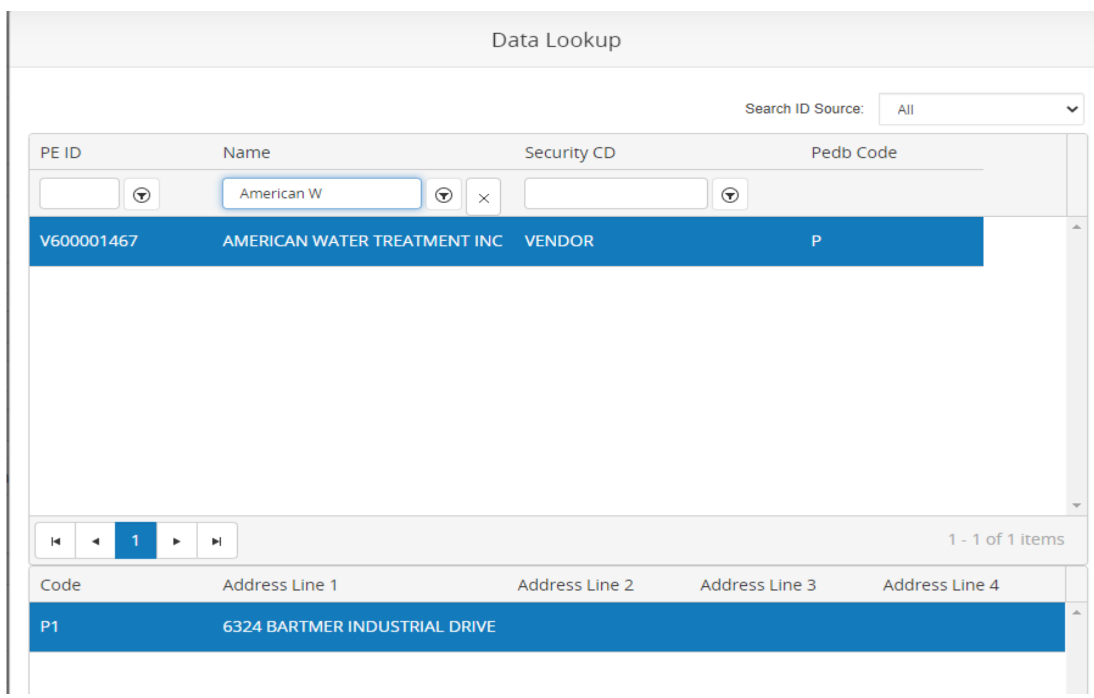
1. To create a Contract Requisition, begin by clicking on **Contracts Management – CMUPCM** on your **Schools / Departments Tab**. Please ensure that your source document provides the Budget Account Number, Vendor Name, Ship to address and any special notes.

2. Click on the **+ Icon** at the top of the screen to bring up a contract management – entry screen 

3. On the "**Contract No:**" field, Click on the  **lighting bolt**, select **CONTNUM** and document your Contract No:

4. In the "**Contractor ID**" field enter the Contractor ID Number or look up the Contractor ID number by clicking on the icon and selecting Lookup Ctrl+L

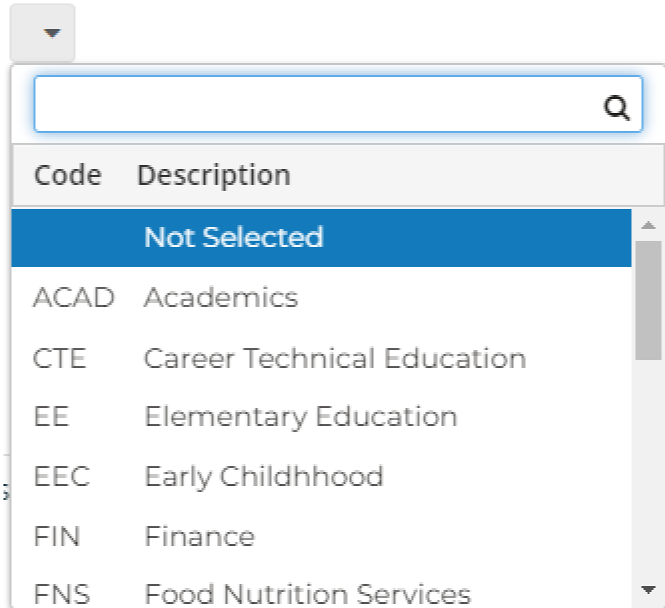
5. Enter a portion of the Contractor's name and press **Enter** (it is not necessary to enter full name). The system will display names matching the characters entered. Select the appropriate ID by highlighting it and clicking OK. Double clicking will also pull the ID back into the record.
6.



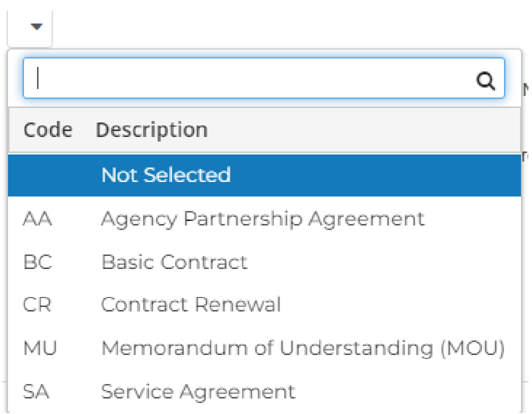
7.

8. In the "**Desc:**" field enter a brief description of the contract.

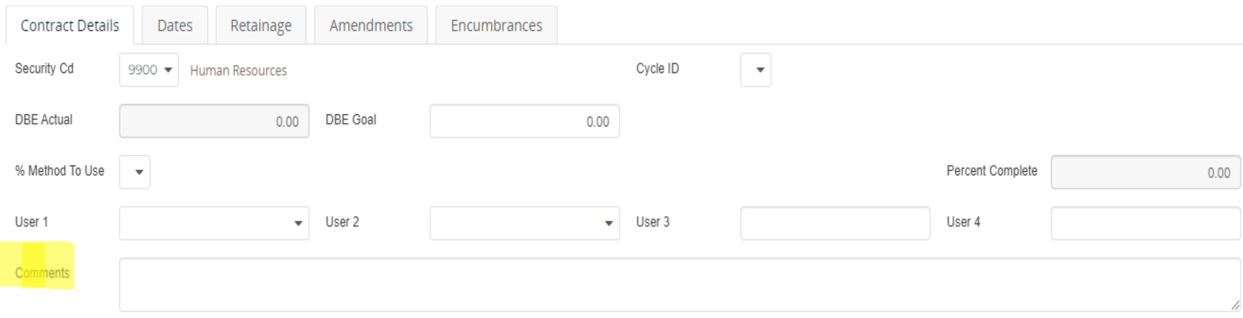
9. In the Manager* field clicking on the Dropdown button and select the Department that is responsible for managing the contract:



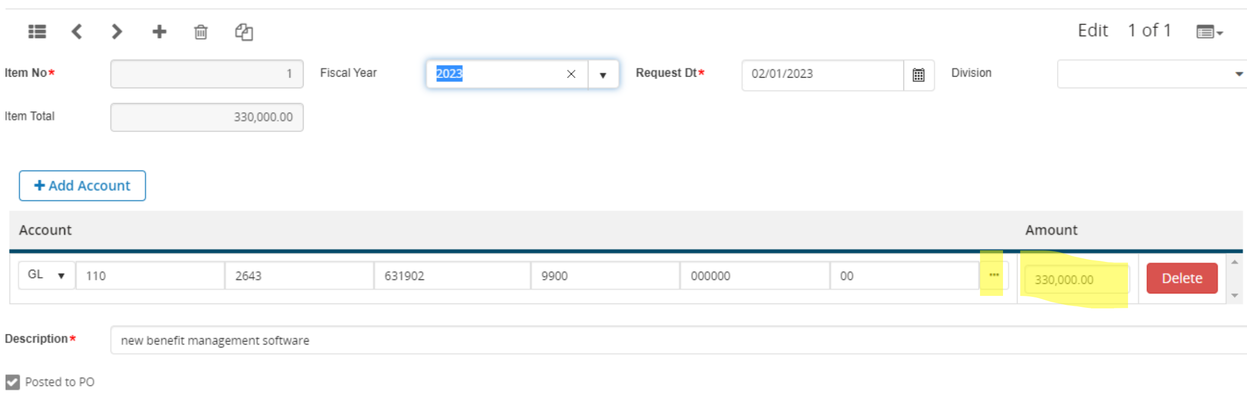
10. In the In the Type* field clicking on the Dropdown button and select the appropriate type of contract:



11. In the “**Original Amt**” enter the total dollar amount of the contract
12. In the “**Begin Dt**” field, enter the beginning date of the contract
13. In the “**Current End Dt**” field, enter the end date of the contract
14. Enter the “**RFP/Bid No:”** field, if applicable
15. On the “**Contract Details”** tab on the “**Comments**” field, enter contract details



16. On the "**Encumbrance**" tab, click on the  ellipsis button and select "Lookup Account" to search for your specific line item account

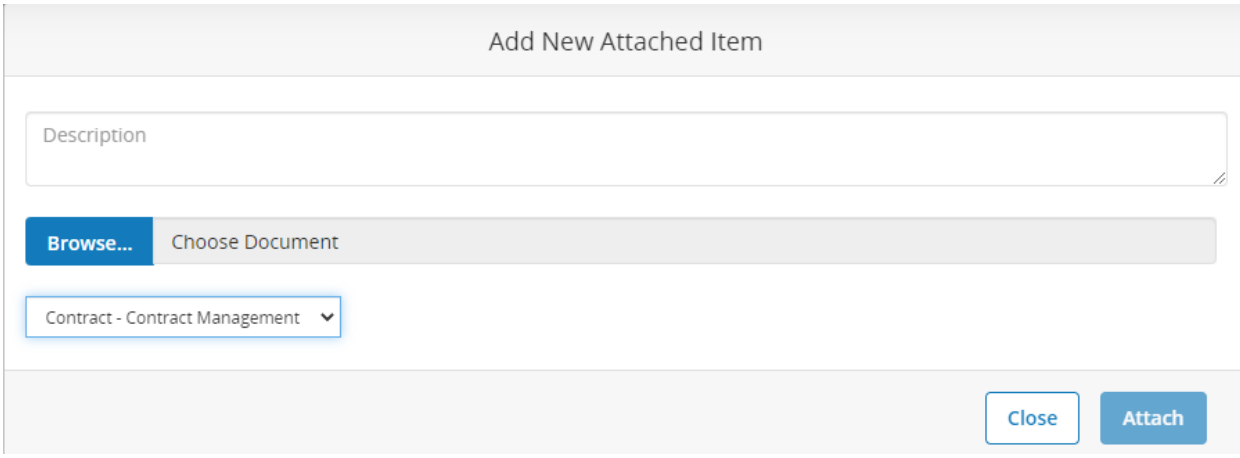


17. Populate the applicable fields for the account you are using, and click **Ok.** A list will appear of account numbers for your department. Double click on the appropriate Account to have the system bring it up onto the Encumbrance tab.

18. In the **Description Field**, enter a Description that identifies the purpose of the Contract. **This Description will populate the Description Field on the Purchase Order**. In the **Amount Field**, enter the amount of the Contract.

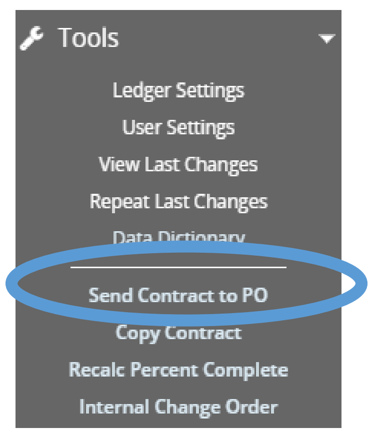
19. To add attachments such as a "Contract" and / or "Letter to Proceed", click on the 

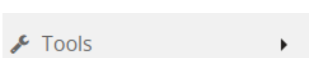
tab, on the left side panel of the screen. Click on "**Add Attachment".** The "**Attachment Dialog"** box will appear, enter a Description in the **Description Field**. Click on **Browse**, Select your Document, Click on **Attach**.



******Press Enter to save Contract to get "Record Accepted" message******

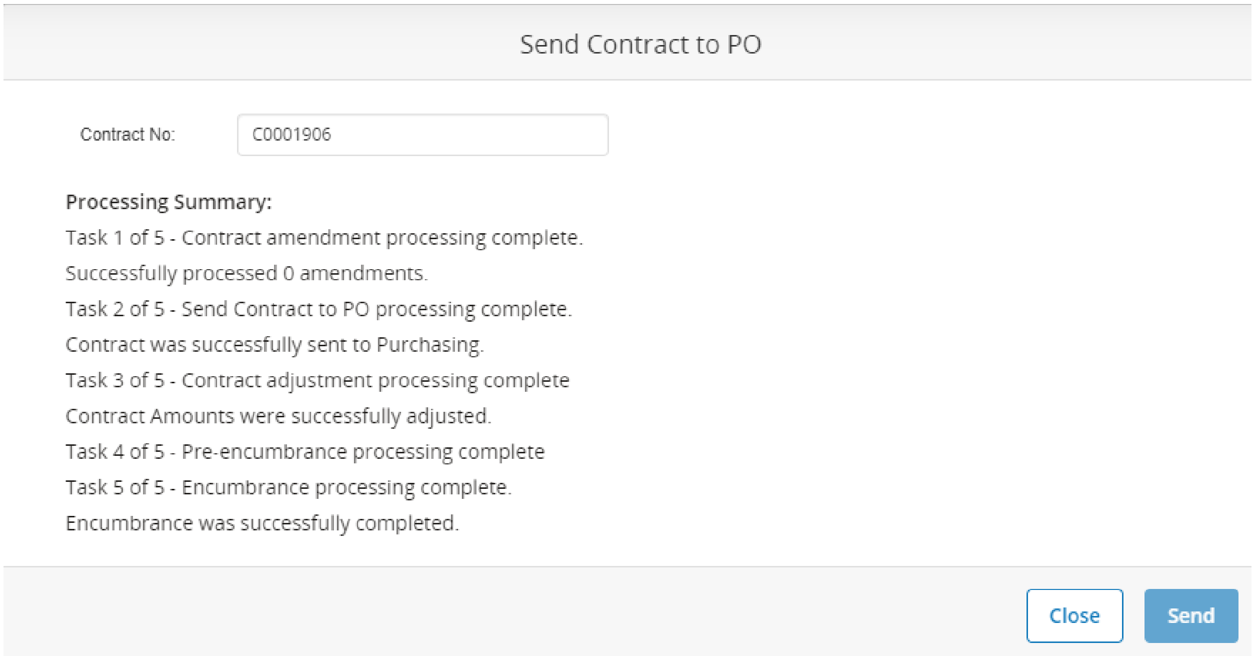
20. Once you have entered all information for the contract press, click on the





tab. Click on "**Send Contract PO"** and click "**Send**"

21. You will see the below message if the job ran successfully:



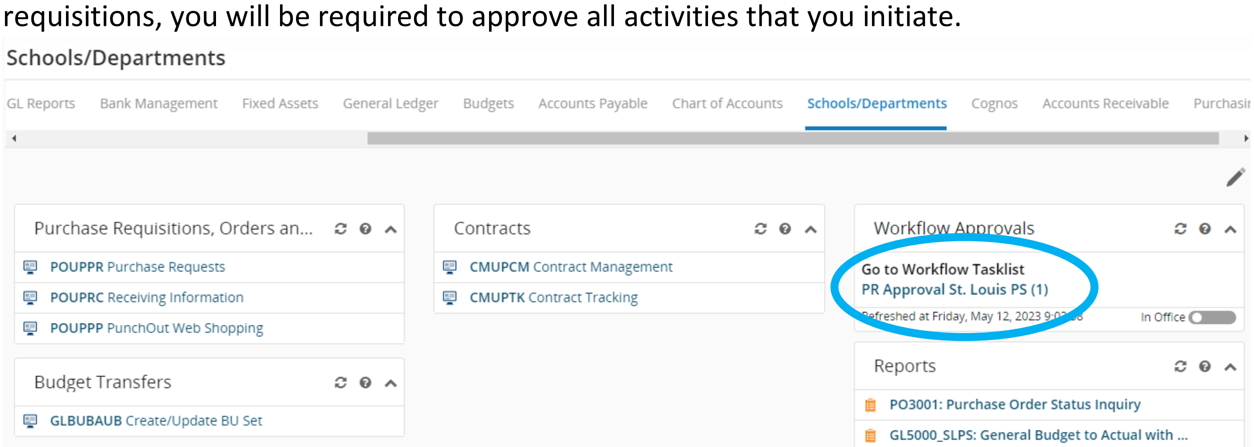
22. Once the contract is successfully sent to a PO, the contract requisition is routed through the Workflow System. You **__must__** log into the "Enter Purchase Requisition – POUPPR" screen to approve the contract from the workflow tab

Please Note: If the contract is not approved in the requisition screen, it is not processed, and a Purchase Order will never be generated!

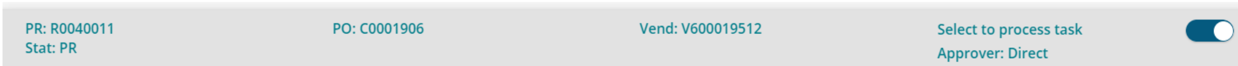
STEP 2

WORKFLOW APPROVALS FOR CONTRACTS THROUGH "POUPPR" SCREEN

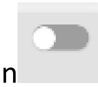
1. Begin by logging into BusinessPlus, click on the ***Schools/Departments*** Tab. Under ***Workflow Approvals***, Select ***PR Approval*** . Please note: if you have the ability to initiate and approve requisitions, you will be required to approve all activities that you initiate.



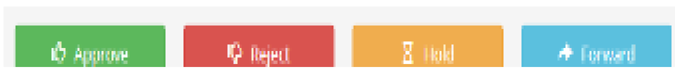
1. The pending requisition will be listed in the workflow click on "***Go to Workflow Tasklist"*** in the Workflow Approvals box as pictured above. To view details of a transaction click anywhere on the gray box(s)



to expand and see the detailed information for that Purchase Requisition.

2. Slide the button  on the right to select the activity for approval.

3. To respond to the pending activity, select either of the following icons and submit:
   a. ***Green bar*** = Approve
   b. ***Red bar*** = Reject

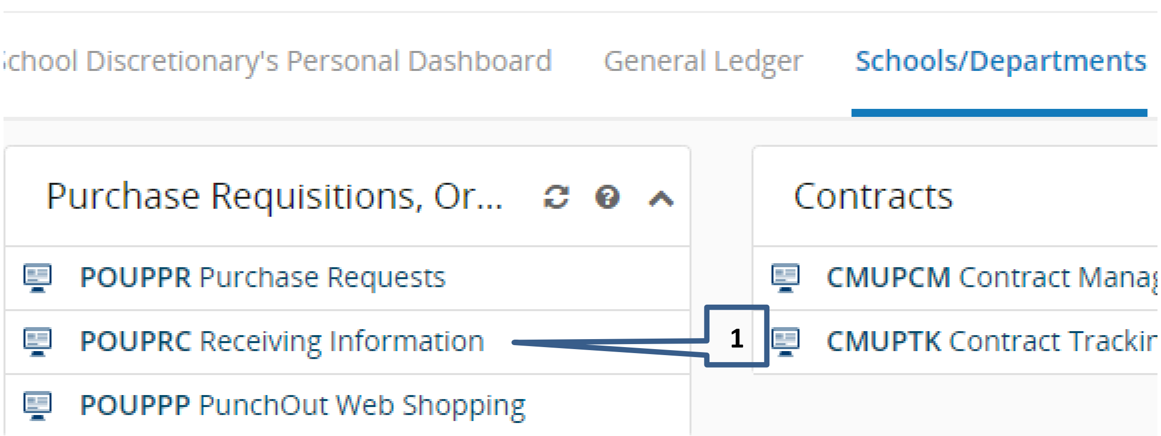


2. Once the requisition is completely approved, a PO will be generated and sent to the vendor. The PO is then attached to the requisition in BusinessPLUS

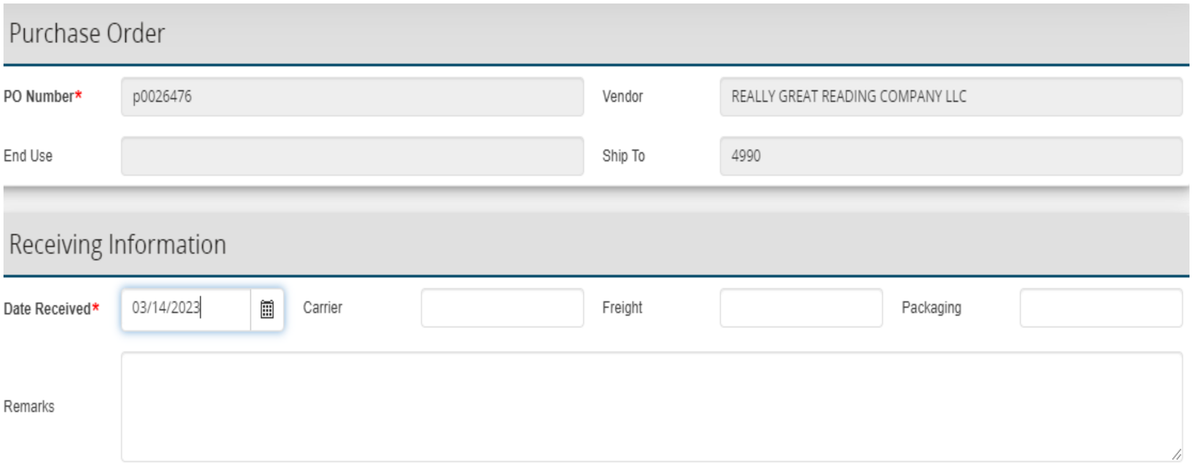
PURCHASE ORDER RECEIVING (GOODS RECEIPT) - POUPRC

PO receiving is used when you received shipment on the items listed on the purchase order

1. Click on **Receiving Information** – POUPRC Link

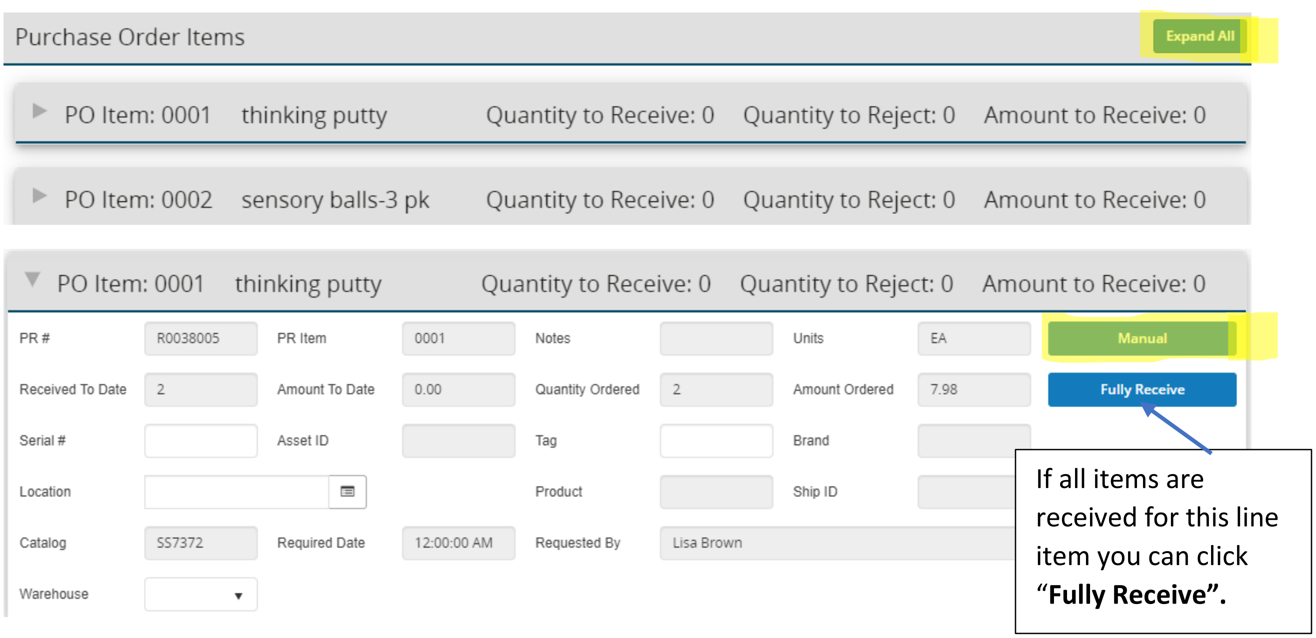


2. Enter the Purchase Order Number in the "**PO Number**" field

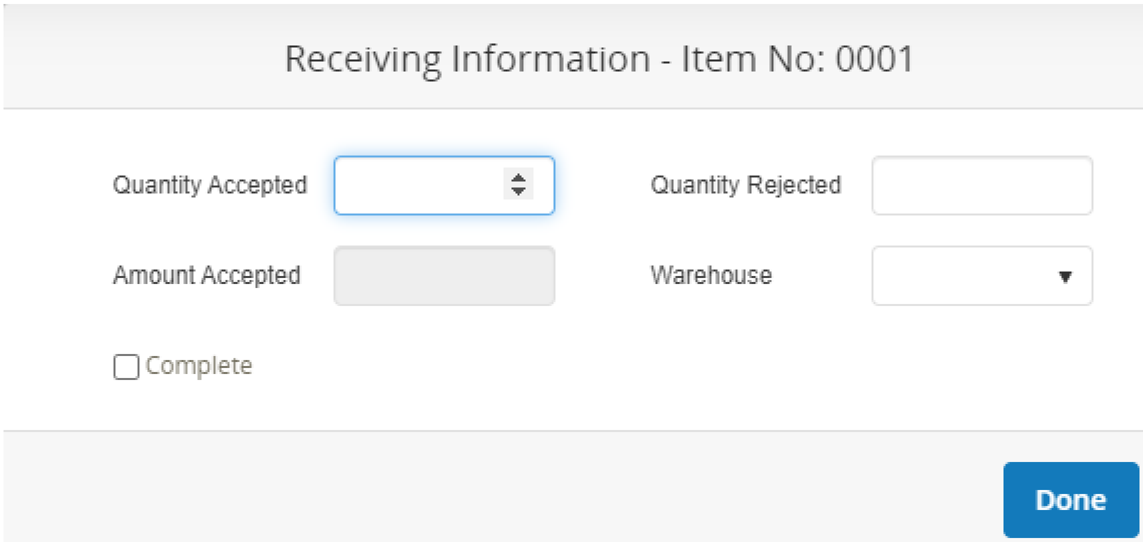


3. If all items have been received on the **left side menu**, click Receive All and then Save Changes

4. If all items **have not** been received, you must Expand All and enter the "Quantity Accepted" for the line items that have been received



5. Click on Manual, and complete "**Quantity Accepted" or "Quantity Rejected" if you are returning items to the vendor.** Click **"Done"**



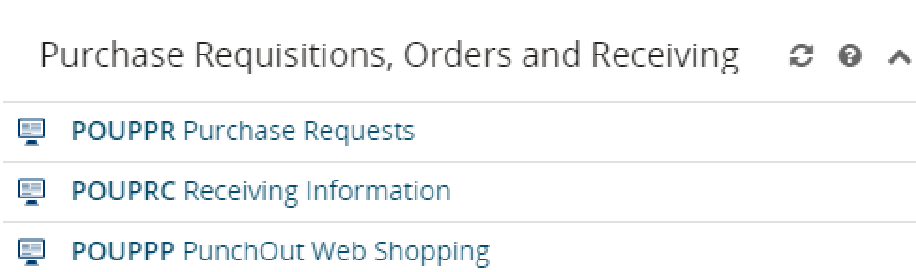
6. Upon completion of the "Manual" receiving information click 

7. If there are additional comments, you can enter the comments within the Remarks section.

PUNCHOUT INSTRUCTIONS: HOW TO ORDER IN PUNCHOUT-POUPPP

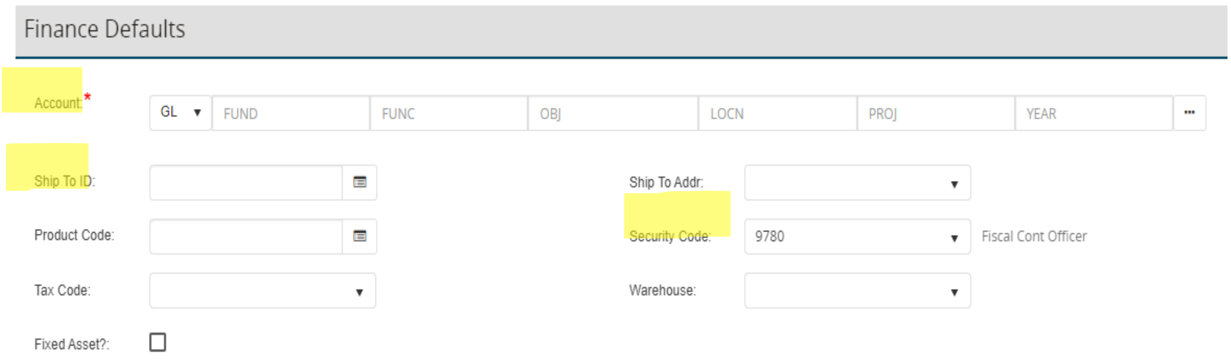
PunchOut is used to create an easy purchasing application for commonly used vendors. The vendors currently on this feature are Office Essentials, School Specialty, Amazon, Lakeshore Learning Materials and Dell. Please follow the instructions below to create a purchase request utilizing punchout.

1. Begin by logging into BusinessPLUS, click on the ***Schools/Departments*** Tab. Once on this tab, select the **Purchase Requisitions, Orders and Receiving Box,**



then click on "**POUPPP-PunchOut Web Shopping.**

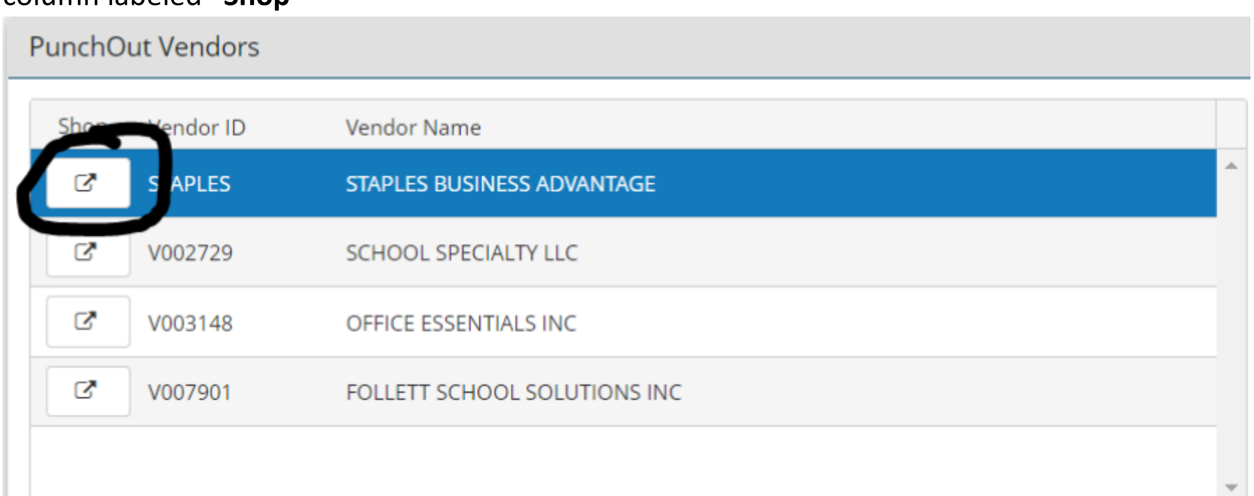
2. Complete the bottom section of the POUPPP screen first.



a. **Account –** This is the account you will be charging the purchase to. You can look up your account code by clicking on the ... at the end of the account line.
b. **Ship to ID –** This should be the location where you want the items shipped.
c. **Security Code –** This should automatically populate, but if it does not you will need to enter the location you are placing the order under.

PunchOut orders can only be ordered by one Object Code i.e. (General Supplies). If you have items that fall under a different object code i.e. (Tech Supplies) then you need to generate a separate PunchOut order. PunchOut orders cannot be changed or edited after you have exited the vendor's site. Finance will reject the Purchase Requisition if you have multiple object code items on a PunchOut order.

3. Select the vendor you wish to purchase from and click the link button in the column labeled **"Shop"**



4. This will open the external vendor's website. You can shop and build your cart. **You can not make any changes or edits to your cart after you have exited the vendor's site.**

5. After you review your cart and submit the order, the system will redirect you back to the Business Plus Purchase Requisition screen with all the purchase request information entered into the requisition. Review and submit for approval. **(Refer to page 38 for Purchase Requisition approval.)**

6. After you complete the purchase requisition and the workflow approval has been completed a purchase order is created and sent electronically to the vendor.

Note: You do not need to attach a quote if you are using PunchOut.

GRANTS/BUDGET

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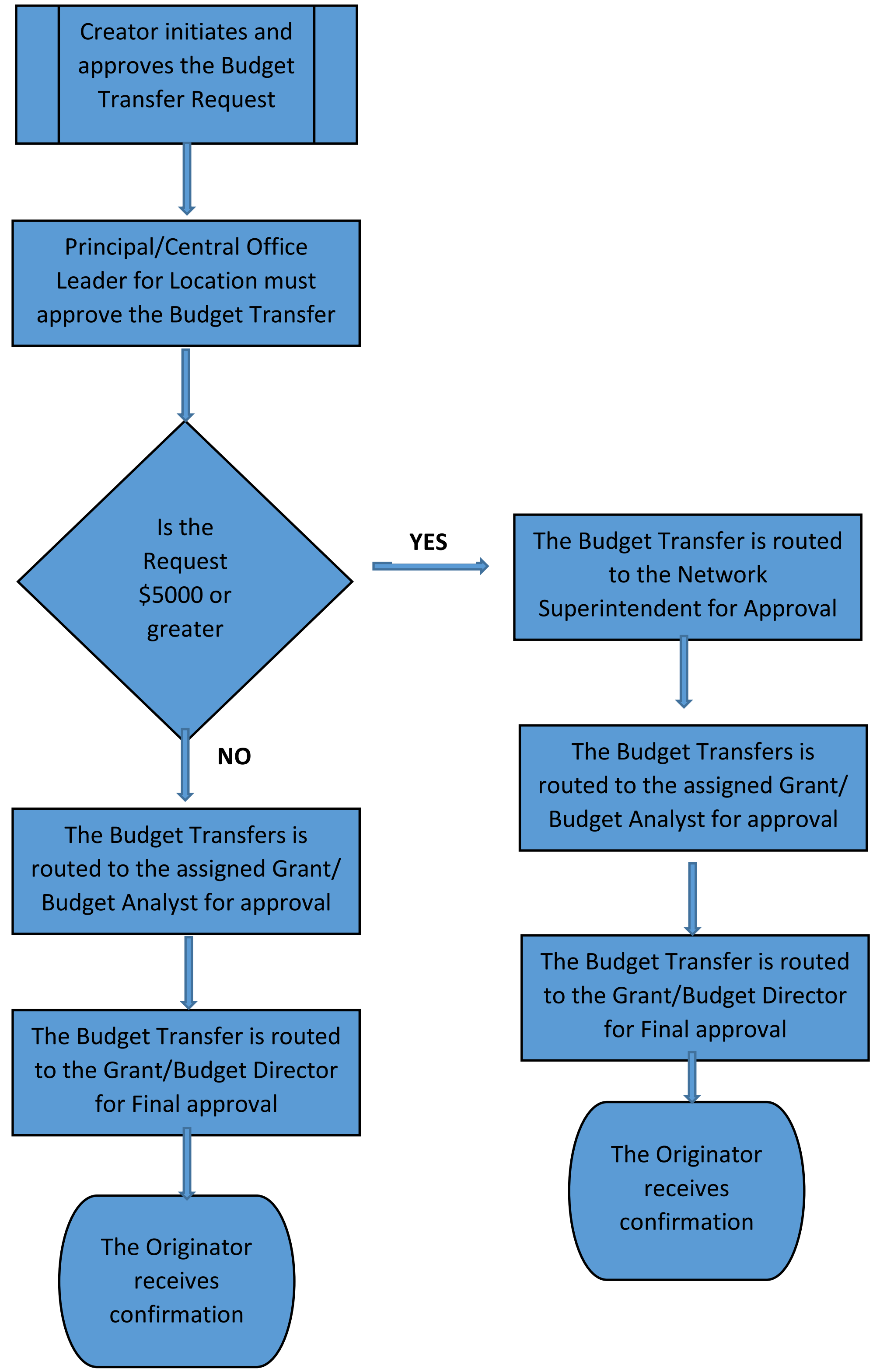
BUDGET TRANSFER WORKFLOW

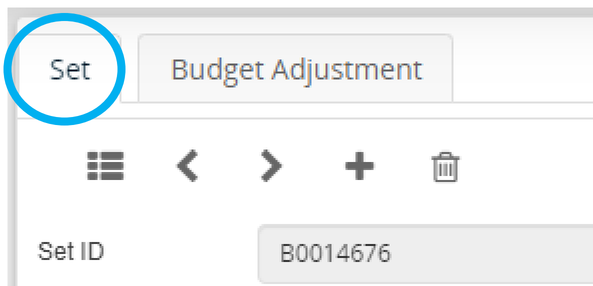


BUDGET TRANSFER PROCESS

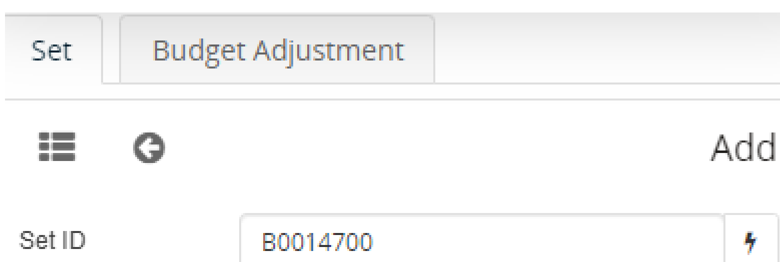
SINGLE TRANSACTION BUDGET TRANSFERS:

1. Log into BusinessPlus, Click on the "***Schools/Department"*** Tab, Click on "***Create/Update Bu Set – GLBBUBAUB"*** under the Budget Transfer category

A dialogue box will appear as shown below. Confirm that the ***Set*** Tab is selected.



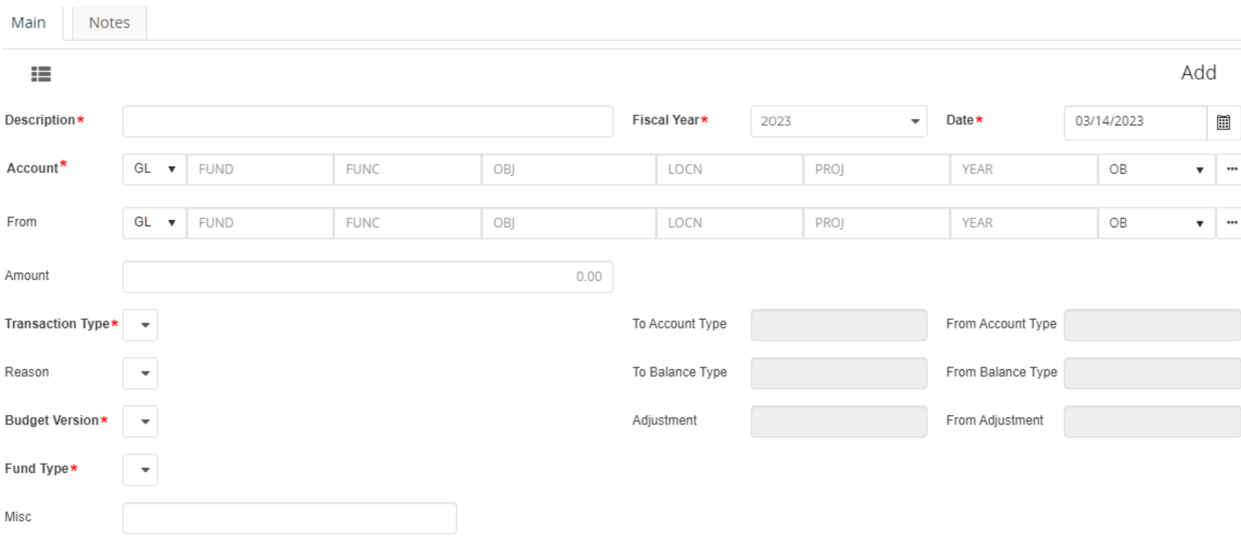
2. Click the + to place you in entry mode, then to create the batch, click the ***lighting bolt*** in the ***Set ID*** field, select BTCHIDBU from the drop-down menu to obtain the next auto-generated Set ID number, and then press ***Enter*** (on your keyboard).



3. You should receive a confirmation stating that the record is accepted.
4. Select the "**Budget Adjustment**" tab to begin the entry of your budget transfer

5. Click the ***lighting bolt*** in the ***Reference*** field, then select BUID from the drop-down menu to obtain the next auto-generated reference number.

Under the ***Main*** Tab:



a. ***Description***: Enter a description that will support the rationale/justification for the budget transfer (30 maximum characters). Please use the ***Notes*** Tab to provide or expound on a rationale/justification.

b. ***To*** and ***From***: Enter or click on the ··· ***ellipsis*** to view the drop-down menu and select ***Lookup Account*** to obtain the fully qualified accounts (FQA) that will be adjusted. Enter specific information to filter and identify desired accounts and select ***Ok*** to complete the ***Account Lookup*** selection.

c. ***Amount***: Enter the amount of the transfer.

d. ***Transaction Type***: Always select ***T Transfer and create new associations as needed*** *from the drop-down menu*.

e. ***Reason***: Select the following from the drop down menu:

   a. ***BAPP – Board Approved***
   b. ***BUD- non-granted funded transfers***
   c. ***GRNT – Grant funded transfers***
   d. ***NONE- Do not select this option***

BAPP – Board Approved transfers:
(1) That exceeds $50,000 per transaction
(2) Between different funds (e.g. 110 and 210)
(3) With object 634301 for out of town travel and conferences.

All budget transfers requesting a transfer to object ***634301 – Out of Town Travel*** should include the following information under the ***NOTES*** tab:

1. Conference Name
2. Conference Attendee(s)
3. Conference location
4. Conference dates

f. ***Budget Version***: Select the following from the drop down menu:

   e. ***BA Adjustments*** - (for non-grant funds)
   f. **GA Adjustments-** (for Grant funds)

g. ***Fund Type:*** Select ***RB Rebudget*** from the drop-down menu.

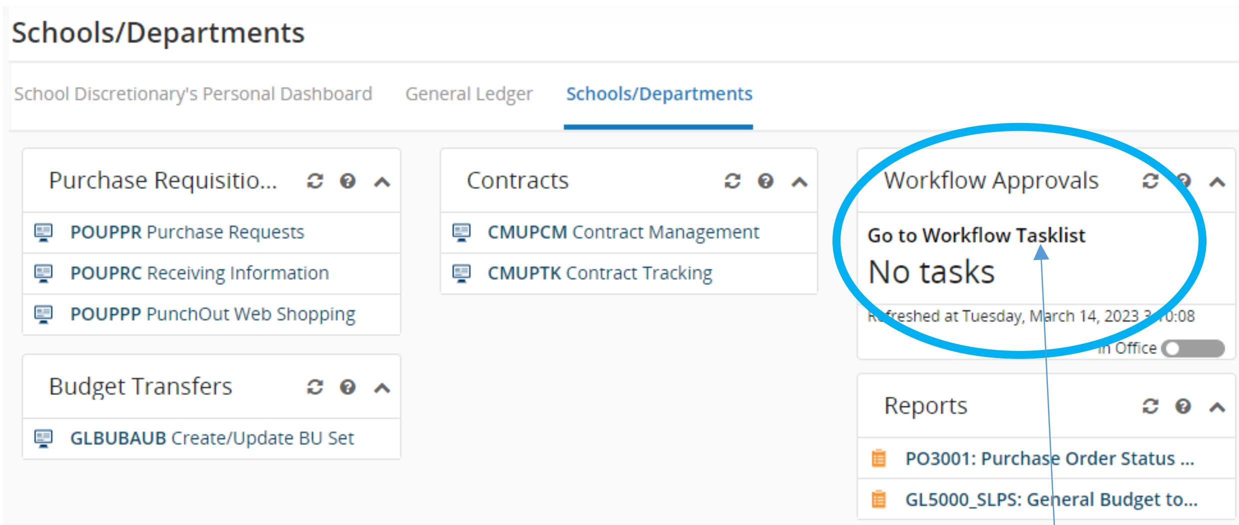
h. Press Enter (on the keyboard) to complete the transaction.

6. To confirm that the transaction is complete, a notification Record Accepted will be displayed.

The Account To line will disappear after the record accepted button is pressed.

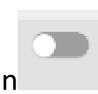
Budget Transfers: How to Approve Budget Transfers

4. Begin by logging into BusinessPlus, click on the ***Schools/Departments*** Tab. Under ***Workflow Approvals***, Select ***Budget Transfer***. Please note: if you have the ability to initiate and approve budget transfers, you will be required to approve all budget transfers that you initiate.

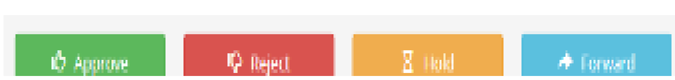


5. The pending budget transfers will be listed in the workflow click on "***Go to Workflow Tasklist"*** in the Workflow Approvals box as pictured above. To view details of a transaction click on the gray box(s)

to expand and see the detailed information for that Budget Transfer.

6. Slide the button  on the right to select the transfer for approval.

7. To respond to the pending budget transfer, select either of the following icons and submit:
   a. ***Green bar*** = Approve
   b. ***Red bar*** = Reject



8. An approver may add comments when responding to budget transfer.

9. After the final approver responds to the budget transfer, an email notification will be generated and sent to the person who initiated the original budget transfer. Below is an example of an email notifications for an approved budget transfer.

```
-----Original Message-----
From: BusinessPLUS
Sent: Wednesday, June 06, 2018 12:27 PM
To: Logan, Ericka R.
Subject: Budget Transfer Distribution Notification

Budget Transfer Set #B0000026 has been approved and distributed.


BUDGET INFORMATION: FQA
============================================
Create Date  = 6/5/2018
Create User  = ELOGAN6386
Set ID       = B0000026

Reference: BU00000026

FY     Vers  Date/        Acct/
Desc         Reason       Desc                          Increase         Decrease
======== ===== ==========    ================================ ================= =================
2018    BA    6/5/2018    To:110-1131-634302-3140-000000-00         $313.50
Perfect attendance incentivesBUD          Fanning MS      Meeting Expenses
                  From:110-1131-641101-3140-000000-00                      $313.50
                    Fanning MS      General Supplies

                                Reference Total: ================= =================
                                                  $313.50         $313.50
```

BUSINESSPLUS REPORTS

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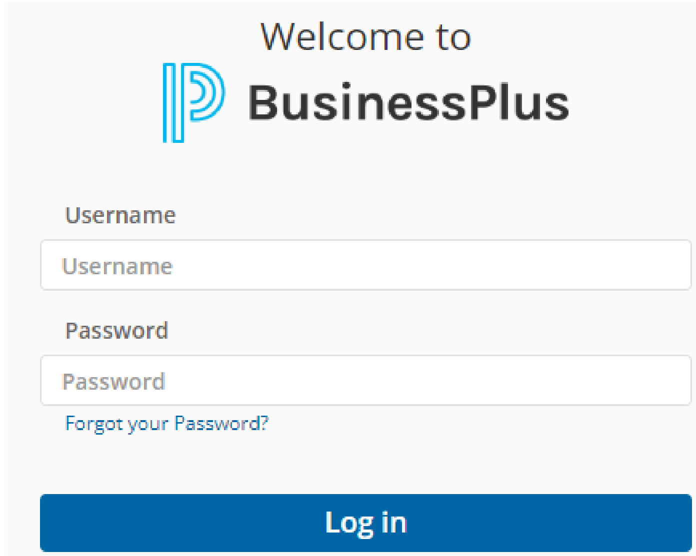
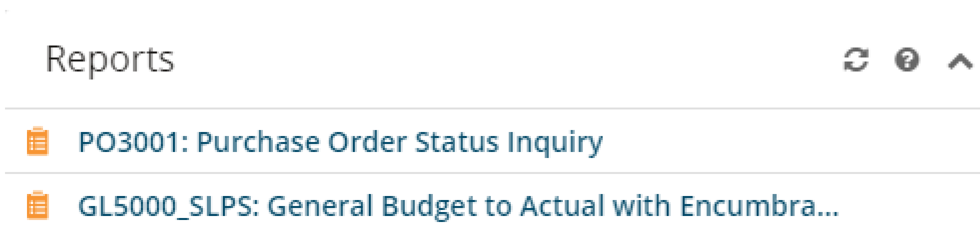
<u>BUDGET REPORT – BUDGET TO ACTUAL</u>

1. From the BusinessPLUS log in screen, please enter your User ID and Password

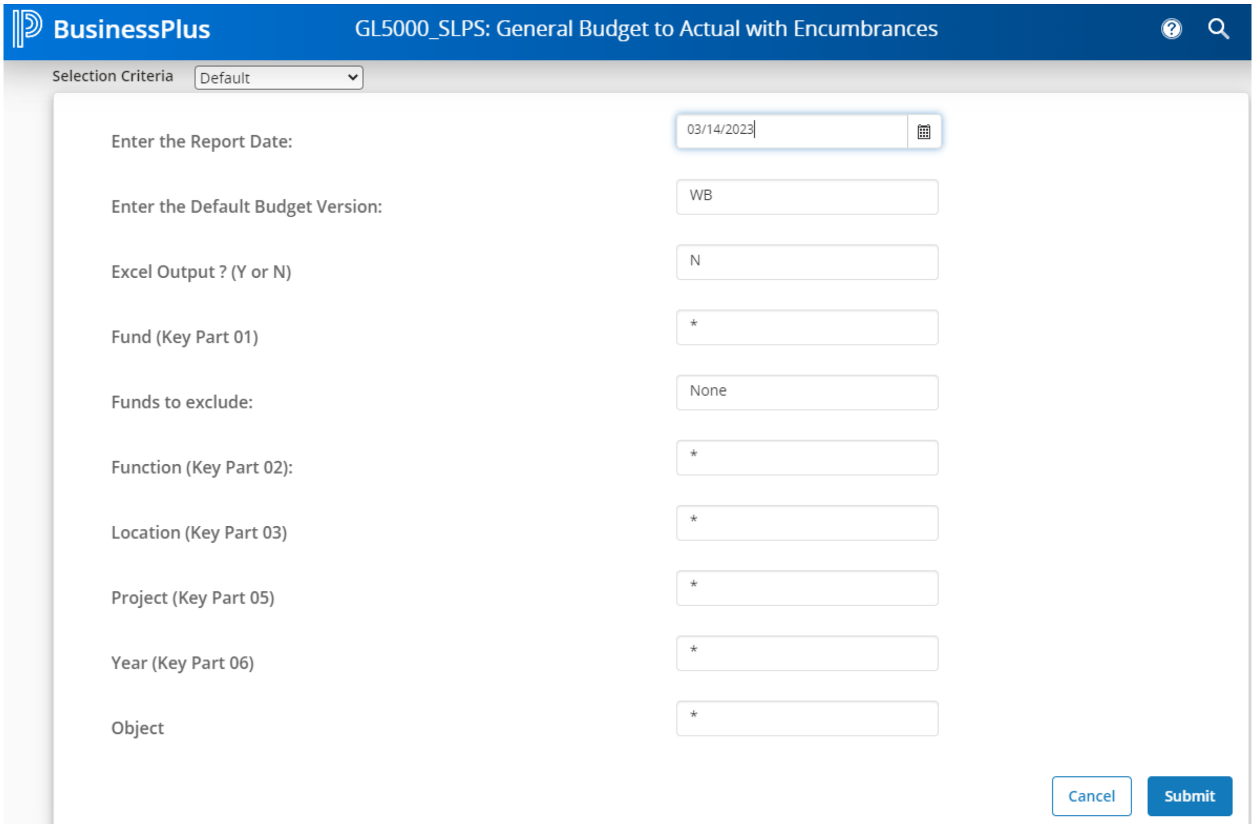
i. 

2. Click on the School/Departments tab 

, the below screen will appear.
3. The School/Department reports will be under the School/Dept Reports box.



4. Click on the "GL5000_SLPS: General Budget to Actual with Encumbrances" report and the below box will appear:



5. If you have multiple locations, enter the location in the location box in order to pull that specific location. If you have one location you can just click Submit to run the report.

ST LOUIS PUBLIC SCHOOLS

Budget to Actuals with Encumbrances

Fiscal Year: 2020 **Report Date: 07/09/2019**

Account	Object Description	Original Budget	Current Budget	Encumb	Actual	Available Balance
Location: [redacted] Elementary						
110-1111-634302[redacted]-000000-00	Meeting Expenses	1,500.00	1,500.00	0.00	0.00	1,500.00
110-1111-636102[redacted]-000000-00	Postage	500.00	500.00	0.00	0.00	500.00
110-1111-641101[redacted]-000000-00	General Supplies	20,082.00	20,082.00	314.95	0.00	19,767.05
110-1111-641104[redacted]-000000-00	Trophies/Awards/Incentives	2,000.00	2,000.00	0.00	0.00	2,000.00
110-1111-641201[redacted]-000000-00	Computers,laptops & iPads<$1K	2,000.00	2,000.00	0.00	0.00	2,000.00
110-1111-641202[redacted]-000000-00	Technology Supplies	1,000.00	1,000.00	0.00	0.00	1,000.00
Project Total: 000000 - General		**27,082.00**	**27,082.00**	**314.95**	**0.00**	**26,767.05**
Fund Total: 110 - General		**27,082.00**	**27,082.00**	**314.95**	**0.00**	**26,767.05**
150-1111-641101-[redacted]451010-19	General Supplies	0.00	0.00	11,946.30	0.00	-11,946.30
150-1111-641104-[redacted]451010-19	Trophies/Awards/Incentives	0.00	0.00	1,263.95	0.00	-1,263.95
150-1111-641201-[redacted]451010-19	Computers,laptops & iPads<$1K	0.00	0.00	16,087.04	0.00	-16,087.04
150-2551-634201-[redacted]451010-19	Cntr Ppl Trnsp-Field Trip	0.00	0.00	5,500.00	0.00	-5,500.00
Project Total: 451010 - Sch Imprvmt(SIG)		**0.00**	**0.00**	**34,797.29**	**0.00**	**-34,797.29**
Fund Total: 150 - Incidental Grants		**0.00**	**0.00**	**34,797.29**	**0.00**	**-34,797.29**
450-1111-654301-[redacted]010-19	Technology Related - Hard >$1K	0.00	0.00	13,745.00	0.00	-13,745.00
Project Total: 451010 - Sch Imprvmt(SIG)		**0.00**	**0.00**	**13,745.00**	**0.00**	**-13,745.00**
Fund Total: 450 - Capital -Grants		**0.00**	**0.00**	**13,745.00**	**0.00**	**-13,745.00**
Location Total: [redacted]Elementary		**27,082.00**	**27,082.00**	**48,857.24**	**0.00**	**-21,775.24**

HOW TO REVIEW THE BUDGET TO ACTUAL REPORT

Account:

FUND	FUNCTION	OBJECT	LOCATION	PROJECT	FISCAL YEAR
110	1111	634302	XXXX	000000	00

Object Description: This object code is a 6 digit number that describes the type of expenditure e.g. 641101- supplies

Original Budget: This represents the adopted original budget that was approved by the board

Current Budget: This represents adjustments to the original budget e.g. budget transfers, etc.

Ecumb (Encumbrances): A dollar amount held (committed) to pay for goods or services.

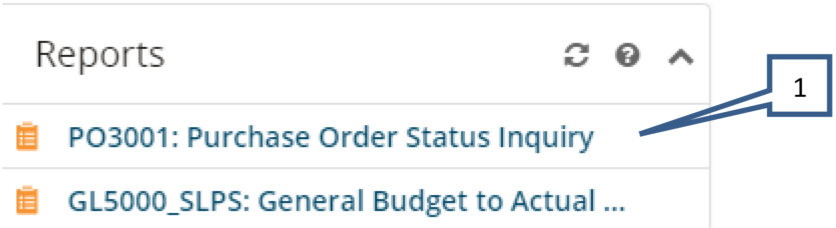
Actual: shows the dollar amount that was actually paid from your budget

Available Balance: indicates the dollar amount available to spend. Current Budget minus Encumbrances/Actuals = Available Balance

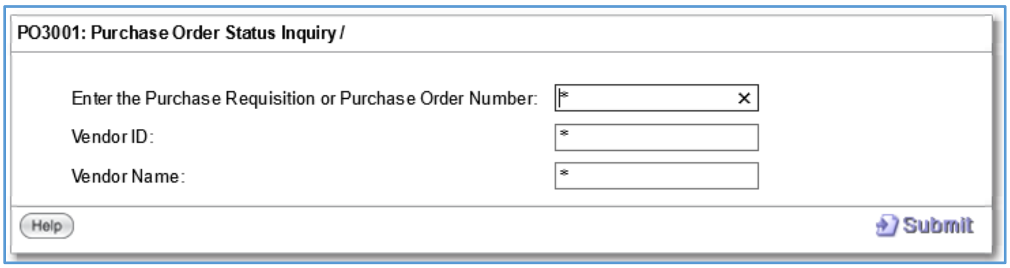
PURCHASING REPORT – PO3001: PURCHASE ORDER STATUS INQUIRY

To check the status of a Purchase Order review the PO3001: Purchase order status inquiry report.

1. From the “School/Department” tab, under the “reports tab, click **PO3001: Purchase Order Status Inquiry**

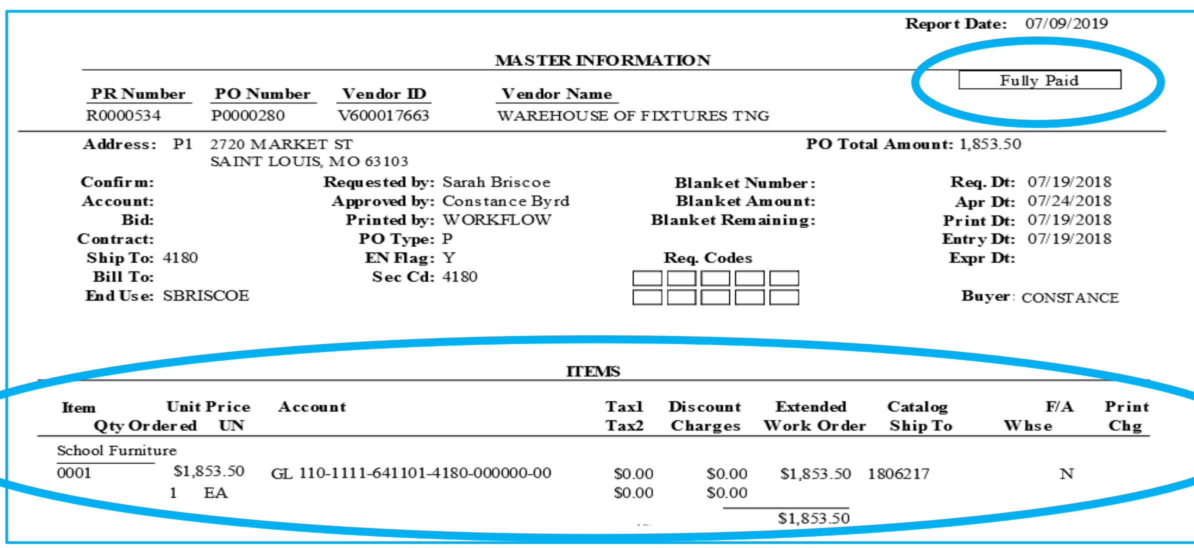


2. Enter the Purchase Requisition or Purchase Order Number or enter the Wildcard ***** into the **Enter Purchase Requisition or Purchase Order Number Field**. Click **Submit**.



The below report will appear

<u>Master Information section</u>: Shows the basic information of the PO that was entered, the status and the items ordered***:***



Report Date: 07/09/2019

MASTER INFORMATION

Fully Paid

PR Number	PO Number	Vendor ID	Vendor Name
R0000534	P0000280	V600017663	WAREHOUSE OF FIXTURES TNG

Address: P1 2720 MARKET ST
SAINT LOUIS, MO 63103

PO Total Amount: 1,853.50

Confirm:
Account:
Bid:
Contract:
Ship To: 4180
Bill To:
End Use: SBRISCOE

Requested by: Sarah Briscoe
Approved by: Constance Byrd
Printed by: WORKFLOW
PO Type: P
EN Flag: Y
Sec Cd: 4180

Blanket Number:
Blanket Amount:
Blanket Remaining:
Req. Codes

Req. Dt: 07/19/2018
Apr Dt: 07/24/2018
Print Dt: 07/19/2018
Entry Dt: 07/19/2018
Expr Dt:
Buyer: CONSTANCE

ITEMS

Item / Qty Ordered	Unit Price / UN	Account	Tax1 / Tax2	Discount / Charges	Extended / Work Order	Catalog / Ship To	F/A / Whse	Print / Chg
School Furniture								
0001	$1,853.50	GL 110-1111-641101-4180-000000-00	$0.00	$0.00	$1,853.50	1806217	N	
1	EA		$0.00	$0.00				
					$1,853.50			

<u>Encumbrances:</u> This sections shows what funds have been encumbered and what has been paid

<u>Receiving detail:</u> This section shows what Qty. items have been received via the "receive on purchase" process. It also shows the Qty. paid that was entered by the AP department

ENCUMBRANCES

Item #	PR Number	Batch ID	Account	Post Date	EN Amount	PD Amount	Balance	Tp
School Furniture								
0001	R0000534	PO	GL 110-1111-641101-4180-000000-00	07/19/18	$1,853.50	$0.00	$1,853.50	EN
0001	R0000534	OH006596	GL 110-1111-641101-4180-000000-00	11/19/18	$0.00	$1,853.50	$0.00	FP
				PO Balance:	$1,853.50	$1,853.50	$0.00	

RECEIVING DETAIL

Item #	Date Received	Quantity Received	Quantity Paid	Quantity Damaged	User	Entry Date	Warehouse	Fixed Asset ID
0001	09/04/2018	1.00	0.00	0.00	LDAVIS0304	09/04/2018		
0001	11/19/2018	0.00	1.00	0.00	SMORRIS78:	11/19/2018		
		1.00	1.00	0.00				

Open Hold Activity: This sections shows what has been paid including the account, check #, check date, invoice and invoice date as well as the amount

OPEN HOLD ACTIVITY

Item #	Sts	Vend.ID	Set ID	Account	Check #	Check Date	Invoice #	Invoice Date	Amount
0001	PD	V6000176(	OH006596	110-1111-641101-4180-000000-00	00452857	11/20/2018	1807152SM	08/30/2018	1,853.50
					TOTAL AMOUNT CHECK AP 00452857:				$1,853.50

GENERAL INFORMATION

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GENERAL INFORMATION AND RESOURCES

Any questions in reference to PowerSchool- BusinessPLUS, please send email to the below email address:

BusinessPlusHelp@slps.org

Additional BusinessPLUS Resources:

https://www.slps.org/Page/23540

- BusinessPLUS Access Request Form
- BusinessPLUS Training Manual
- BusinessPLUS Year End Training
- Navigation Guide
- Account Code Structure
- Fund Quick Reference
- Location Quick Reference
- Object Quick Reference

BUSINESSPLUS FAQ'S

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BUSINESSPLUS FREQUENTLY ASKED QUESTIONS

Question: My Vendor hasn't received payment yet, what should I do?

- Confirm that your purchase requisition has been completely approved in BusinessPLUS
- Verify that your location has "received on purchases" in BusinessPLUS
- Check PO3001 status report to verify if payment was made
- If your location has any invoices, please forward to AccountsPayable@slps.org

Question: My PO has been approved, but I have not received my items, what should I do?

- Please confirm that your location has "received on purchases" in BusinessPLUS
- Contact the vendor to confirm if the PO was received

Question: I submitted a budget transfer, when can I expect it to be approved?

- The turnaround time for budget transfers is approximately 24 – 48 hours

Question: What account information (e.g. fund, function, object or Project code) should use for a purchase?

- The first line of communication in reference to any accounting information should be your assigned budget/grant analyst.

Question: I am locked out of BusinessPLUS, who should I contact?

- The districts help desk at 345-5757

Question: How do I check the status of my Purchase Order?

- Go to "PO3001: Purchase Order Status Inquiry" Report
- Enter the PO number, Vendor ID or Vendor Name

Question: How do I find a previously entered Budget Transfer/Requisition?

- Go to "Entity List" tab, and follow the find/search instructions

Question: How do I look at my Title only or GOB Only budget?

- Go to "GL5000_General Budget to Actual" Report
- GOB only: in the "Fund" field enter funds: 110, 210, 410
- Title Funds: in the "Project" field enter project code: 451001

There are multiple combinations of search options that can be entered to retrieve data