

Data Plus Hospitality Solutions Setting up Staff & Req/PO Approvals

In order to approve a requisition or purchase order in Data Plus, the user must first be set up in the Staff file and have an approval limit set in the Req/PO Approval Limits table.

1. Creating a Staff Record

The first step in creating a staff record is to go into Asset Module Table>Staff (The Asset Module Table can be reached through either Main Menu>File>Maintenance/Lists, or Assets>Purchasing>File Maintenance, or Assets>Inventory>File Maintenance.) When the following screen comes up, click on 'New'

The screenshot shows a software interface for managing staff records. It features a 'FILTER INFORMATION' section with input fields for Staff ID, First Name, Last Name, and Title. To the right of these fields are several buttons: Exit, Filter, Detail, Select, New, and Delete. Below the filter section is a table titled 'Staff Browse' with columns for Staff ID, Name, Title, Buyer?, Disp?, Requis?, and Active?.

Staff ID	Name	Title	Buyer?	Disp?	Requis?	Active?

The following screen will appear.

The screenshot shows the 'Entry Staff' screen. It has a menu bar with 'File', 'Edit', and 'Help'. The main area contains several input fields: Staff ID, Title, First Name, Last Name, Buyer? (no), Dispatcher? (no), Requisitioner? (no), and Active? (yes). Below these is a 'Default Values' section with fields for Bill To Code, Ship To Code, Property ID, Department No, Storeroom, Type (I), Send Email? (no), and Use Outlook? (no). At the bottom, there are fields for Phone, Fax, Building/Office, E-Mail Address, Auth Login, and Auth Password. A status bar at the very bottom shows 'Added: 04/24/07', 'By: cad', 'Changed:', and 'By:'. A prompt 'Enter Staff ID' is visible at the bottom left.

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Fill in the fields as described below:

- Staff ID:** User ID to be used to identify who created Req/PO. The user does not have to have an actual Data Plus user ID. For example: if purchasing clerks all sign in using the same Data Plus user ID, the staff ID will distinguish one from the other.
- Title:** Staff person's title. This is an optional field
- First Name:** The staff person's first name. This field is required
- Last Name:** The staff person's last name. This field is required
- Buyer?:** Is this person considered to be a buyer for products/services?
- Dispatcher?:** Only available in Work Order.
- Requisitioner?:** Is this person allowed to create requisitions?
- Active?:** Is this a current staff member?
- Bill To Code:** This is an optional field. If this user's purchase orders are all billed to the same place, the default can be entered here. This saves time when creating the PO. It can also be overridden when creating PO.
- Ship To Code:** This is an optional field. If this user's purchase orders are all shipped to the same place, the default can be entered here. This saves time when creating the PO. It can also be overridden when creating PO.
- Property ID:** Only available in multi-property databases. If this user only orders for a single property, that property ID may be entered here.
- Department No:** This is an optional field. If this user only orders for one department, that department number may be entered here. It can also be overridden when creating PO.
- Storeroom:** This is an optional field. If this user's orders are all shipped to the same storeroom, the storeroom ID may be entered here. It can also be overridden when creating PO.
- Type:** This will default to I (Inventory Storeroom)
- Send Email?** Will this user be sending emails as notification that there is a PO or Requisition to be approved?

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- Use Outlook?*** Does the system use Microsoft Outlook?
- Phone:*** Staff person's phone number. This is an optional field used as reference only.
- Fax:*** Staff person's fax number. This is an optional field used as reference only.
- Building/Office:*** Physical location of Staff person. This is an optional field used as reference only.
- E-Mail Address:*** Required if Staff person is to be using email for notifications of PO and Requisition approvals.
- Auth Login:*** Only available/necessary if email system being used requires an authentication login.
- Auth Password:*** Only available/necessary if email system being used requires an authentication password.

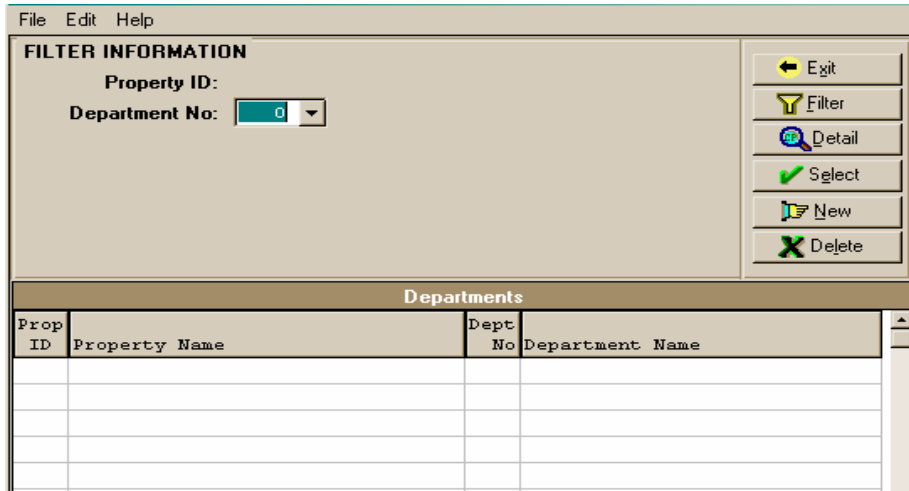
When all fields are filled in, click 'Save,' then 'Exit.'

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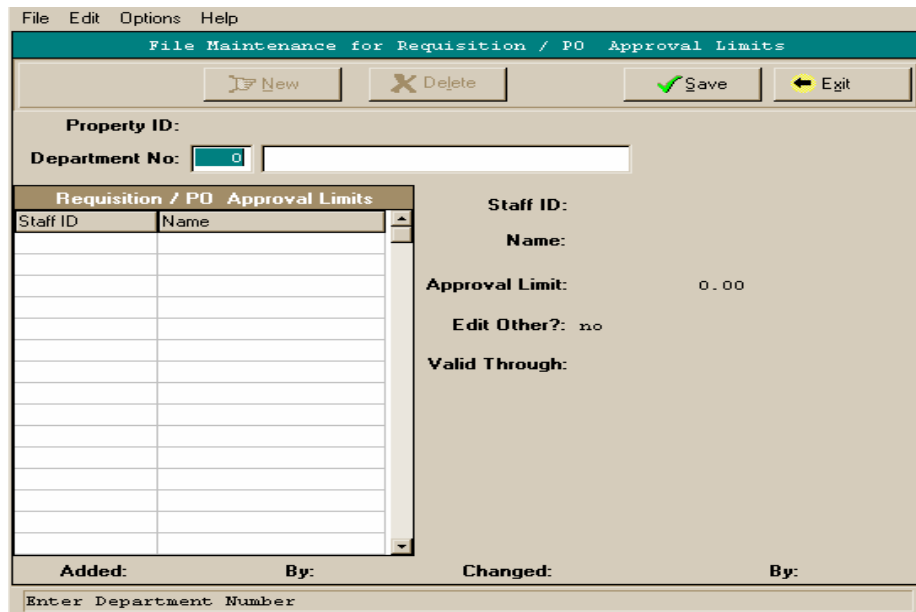
(Note: If Payroll is installed, departments are set up in Payroll. This tech note covers setting up departments in Purchasing, Payroll not installed.)

2. Creating Req/PO Approval Table

To set up a user in the Req/PO Approval Limits table, go to Purchasing > File Maintenance/Lists > Req/PO Approval Limits. Click 'New'



The following screen will appear:



Enter the department number and description. Click 'Save'. The new department is created.

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To create the Req/PO Approval Limit table for this department, click 'New' and fill in the fields as described below:

Staff ID	Name
ehs	ERIK SCHUTTE
jdm	Jocelyn Drum Marks
jed	Jocelyn Drum
leg	Linda Graff
mac	Michelle Cormier
mes	MaryEllen Smart
njm	Nate Monat

Staff ID : Using the drop-down arrow, choose the Staff ID to be added to the Req/PO Approval Limits table. Please note, these are only actual Data Plus user I.D.s, not people created in the Staff file. This is how approvals are controlled.

Name: This will default in from the Staff ID chosen above.

Approval Limit: How high is the limit for this user?

Edit Other?: Is this user allowed to edit other users' Requisitions/P.O.s?

Valid Through: This is an optional field. A date can be entered to stop a user's approval rights.

When all fields are filled, click 'Save.'

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The user will be added to the table as shown below:

To delete a Staff ID, highlight it on the left and press 'Delete'.

If there are any questions, please contact Data Plus Support.