



# eFinancePLUS Requisition Processing

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## Add a New Requisition

1. Go to Main Menu > Purchasing > Entry & Processing > Requisition Processing > Requisitions.
2. Click on  to add a new requisition.
3. Enter General Information as desired for the requisition header.
  - a. The requisition number will be auto-populated using a districtwide numbering system.
  - b. Select your Approval Group from the drop down menu. If the necessary option is not available, contact your treasurer's office to be given access to the necessary approval group.
  - c. The Requested date, which is to be the date the requisition was created, will be auto-populated with the fund accounting profile's transaction date.
  - d. Enter a Required date by which the requested items are needed, or click on  to select a date from the calendar.
  - e. Enter a Vendor Code or click on  to search.
  - f. The Vendor Name and Address will be auto-populated.
  - g. If you plan to add an attachment now, check **Add Attachment?**  to be taken to the attachment page upon saving the requisition. Otherwise, attachments can be added later to the existing requisition if needed.
  - h. Uncheck  **Continuous** if entering only a single requisition or the final requisition. Check the Continuous box if entering multiple requisitions.
    - i. Note: Continuous means after you create the requisition, a new window will automatically open to begin adding a new requisition. If continuous was accidentally left checked, you can click  to cancel out of creating a new requisition.
  - i. If desired, enter a method of Freight, Comments, Buyer (name, title, or department of requester), or Attention (building or department name).
  - j. Select your Ship To Address from the drop down menu. If the necessary option is not available, contact your treasurer's office to be given access to the necessary purchasing default.
  - k. Note: Any field in **red and** designated by an \* is required.
4. After entering all information as required/desired, click  in the action bar near the top left of your screen.
5. Enter Item Detail Information as desired.
  - a. Uncheck  **Continuous** if only adding a single line item or the final line item. Check the Continuous box if adding numerous line items.
    - i. Note: Continuous means after you create the line item, a new window will

automatically open to begin adding a new line item. If continuous was

accidentally left checked, you can click  to cancel out of creating a new line item.

- b. Enter a Description, Quantity, and Unit Price.
  - c. If desired, enter a unit of Measure (i.e. each, gallon, case, etc.).
  - d. Tab through the fields and the Extended Amount, Total Price, etc. will auto-populate.
  - e. You can distribute the cost to accounts by Amount, Percent, or Quantity. Select your desired Distribution Method. Amount is the default.
  - f. Enter a Budget Unit and Account. If unknown click  to search. Wildcards can be used to limit your search results. Add multiple budget units and accounts if needed, indicating the appropriate Quantity, Amount, or Percent for each based on the Distribution Method selected above. The total amount for all distribution lines must equal the Total Price.
  - g. Click on  to add the line item.
  - h. Repeat steps a through g for additional line items as needed.
  - i. If you need to enter Shipping, you must check  **Shipping Charge** to enable the Shipping amount field. This will open the final line item for the requisition. Enter the shipping for the entire order.
6. At any time while entering a requisition, you can click  to save the requisition in progress allowing you to return and complete the requisition at a later date.
- a. To access the requisition later, go to Main Menu > Purchasing > Entry & Processing > Requisition Processing > Requisitions, select Status of In Progress, and click . Highlight the desired requisition and click on .
7. When finished entering items, click on  to save the requisition and submit it for approval.

## Copy a Requisition

1. Go to Main Menu > Purchasing > Entry & Processing > Requisition Processing > Requisitions.
2. Click on  to copy a requisition from the current fiscal year or previous fiscal year.
  - a. After clicking , the message **COPY REQUISITIONS** will display across the top of your screen.
3. Search for the requisition that you would like to copy.
  - a. Enter Search Criteria and click .
4. Highlight the desired requisition.
5. Click on . The information from the original requisition will be copied (with the exception of any attachments) and a new requisition number will be assigned.

6. Make any changes to the requisition header and line items as desired by clicking the appropriate tabs.
  - a. If modifying line items, click on the Line Item tab, then click the icons to go between line items and modify as needed.
  - b. Click or as needed to update the requisition.
7. Click on to save the requisition and submit it for approval.

## Approve Requisitions

1. Go to Main Menu > Purchasing > Entry & Processing > Requisition Processing > Approve/Deny Requisitions.
2. Enter Search Criteria.
  - a. Select Approval Criteria of L-Approved at Lower Level.
  - b. Enter any Additional Criteria as desired or leave additional fields blank to see all awaiting your approval.
3. Click on . A list of all requisitions awaiting your approval will be displayed.
  - a. Alternatively, you may receive an email with requisition details and a link to approve the requisition.
  - b. You can also see requisitions awaiting your approval in the Activities Panel on your Dashboard. To add the Activities Panel, Click on Add Panel from the main page and select Activities from the drop down menu.
4. To review a requisition, double click on any line item to see the details.
  - a. You may need to click on Distributions to see the budget details if multiple budget codes were used.
5. You have the following options: Approve, Deny, Needs Correction. These actions appear in the action bar near the top of your screen:



6. You can select Approve/Deny/Needs Correction on an entire requisition or you can act on each line item individually.
  - a. To act on an entire requisition, highlight the requisition and click on the desired action.
  - b. To act on each line item individually, double click on the requisition to view the requisition detail. Highlight the requisition line items and click on the desired action.
  - c. You can approve some requisitions/lines, deny others, and mark others as needs correction in one batch.
  - d. Note: if denying or marking needs correction, a description/reason will be required. Type a description/reason and click .
7. Click on to submit your actions. The requisition will be marked approved/denied/needs correction accordingly and a report will be generated.