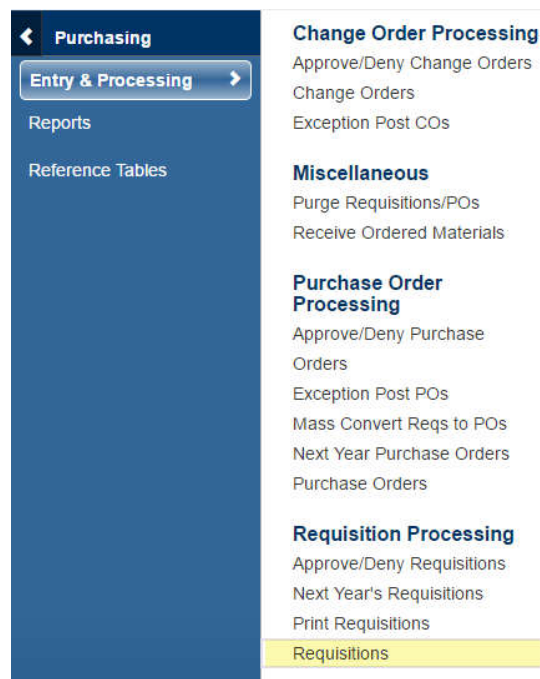
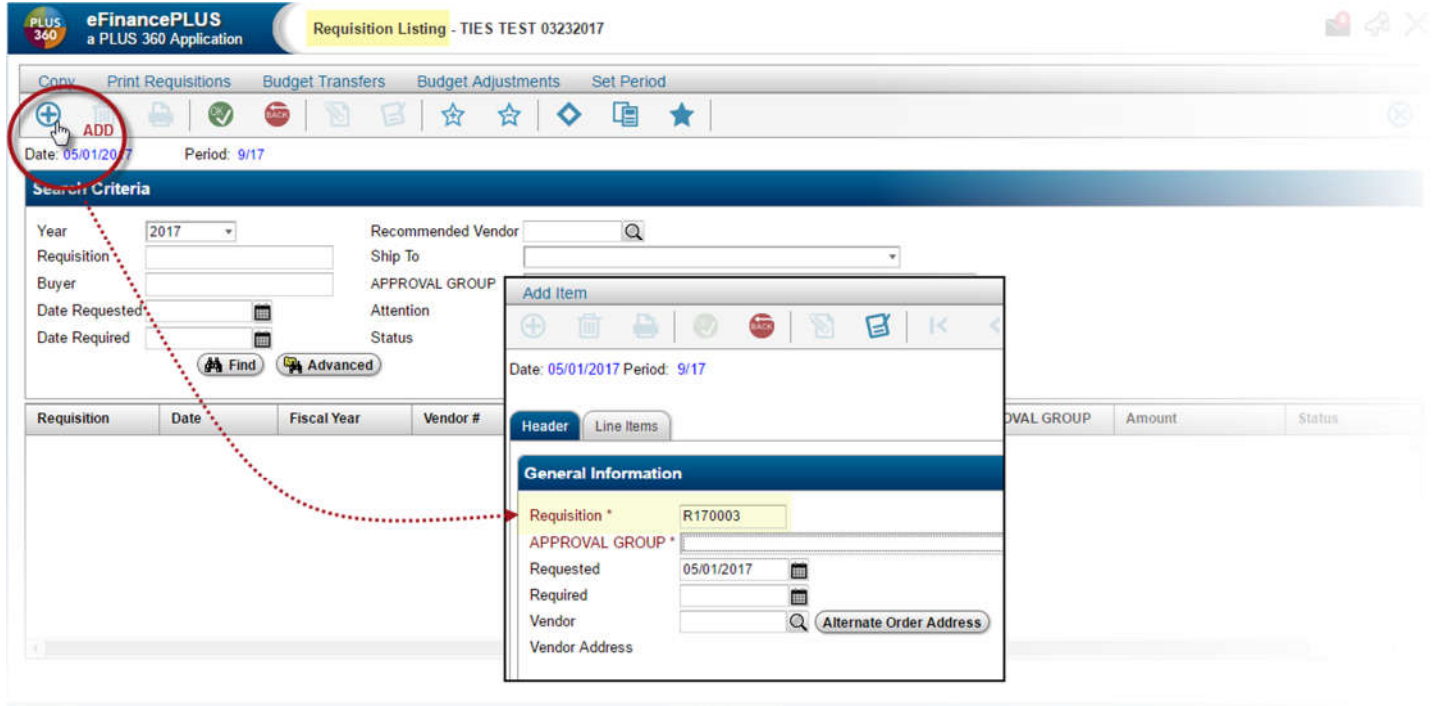


eFinancePLUS - Creating a Requisition

Main Menu > Purchasing > Entry & Processing > Requisition Processing > Requisitions



Click on “ADD” to auto-generate and assign the next available requisition number.



eFinancePLUS
a PLUS 360 Application

Requisition Listing - TIES TEST 03232017

Conv Print Requisitions Budget Transfers Budget Adjustments Set Period

ADD

Date: 05/01/2017 Period: 9/17

Search Criteria

Year: 2017 Recommended Vendor:

Requisition: Ship To:

Buyer: APPROVAL GROUP:

Date Requested: Attention:

Date Required: Status:

Find Advanced

Requisition Date Fiscal Year Vendor #

Add Item

Date: 05/01/2017 Period: 9/17

Header Line Items

General Information

Requisition * R170003

APPROVAL GROUP *

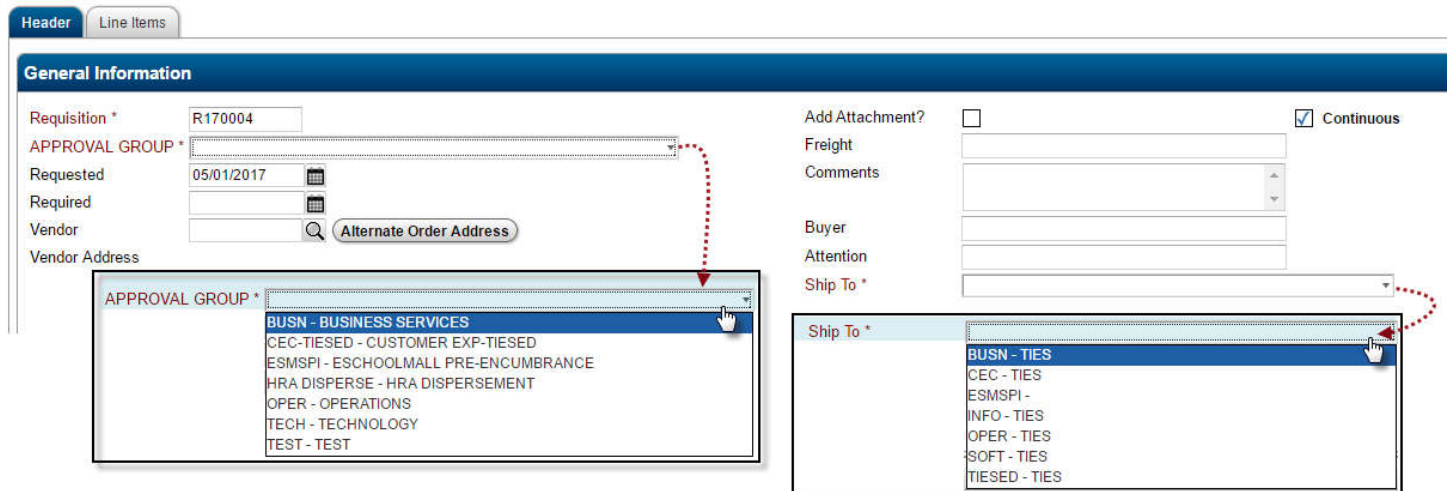
Requested 05/01/2017

Required

Vendor Alternate Order Address

Vendor Address

The Approval Group and Ship To location are required fields. Each user will be set up with the Approval groups and Ship To locations which are relevant to that user.



Header Line Items

General Information

Requisition * R170004

APPROVAL GROUP *

Requested 05/01/2017

Required

Vendor Alternate Order Address

Vendor Address

Add Attachment? ☐ Continuous ☒

Freight

Comments

Buyer:

Attention:

Ship To *

APPROVAL GROUP *

- BUSN - BUSINESS SERVICES
- CEC-TIESED - CUSTOMER EXP-TIESED
- ESMSPI - ESCHOOLMALL PRE-ENCUMBRANCE
- HRA DISPERSE - HRA DISPERSEMENT
- OPER - OPERATIONS
- TECH - TECHNOLOGY
- TEST - TEST

Ship To *

- BUSN - TIES
- CEC - TIES
- ESMSPI -
- INFO - TIES
- OPER - TIES
- SOFT - TIES
- TIESED - TIES

The Vendor is not required for a Requisition, but is typically entered. To enter a vendor, enter the vendor number or select the magnifying glass icon to initiate a search:

Vendor 🔍

PLUS 360 eFinancePLUS
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Vendor Search - TIES TEST 03232017

Search Criteria

Vendor Code

Inactive Status

N - Active

Vendor Name

HEW*

Search Name

Address Line 1

Address Line 2

City

State

Zip Code

Phone

Fax

Contact

Find
Advanced

If the vendor name is known, type the full vendor name or a portion of the name, with an asterisk. The asterisk * is a wild card. In the example above all vendors starting with HEW will display as follows:

Vendor Code	<input type="text"/>	Employee	<input type="checkbox"/>
Inactive Status	N - Active		
Vendor Name	HEW*		
Search Name	<input type="text"/>		
Address Line 1	<input type="text"/>		
Address Line 2	<input type="text"/>		
City	<input type="text"/>	State	<input type="text"/>
Zip Code	<input type="text"/>		
Phone	<input type="text"/>	Fax	<input type="text"/>
Contact	<input type="text"/>		
	Find	Advanced	

Code	Vendor Name	Vendor Address	City	State	Zip	Phone Number	Search Name	Vendor Address2	Last Activity	Inactive Status
04282	HEWLETT-PACKARD CO	13207 COLLECTION CENTER	CHICAGO	IL	60693		HEWLETT-PACKARD CO		01/09/2021	
01833	HEWLETT-PACKARD COMPANY	MS 5578	ROSEVILLE	CA	95747	800-386-1117	HEWLETT-PACKARD COMPAN	8000 FOOTHILLS BLVD	06/24/2020	
05998	HEWLETT PACKARD	PO BOX 277205	GEORGIA	GA	30384	800-888-3224	HEWLETT PACKARD		12/27/2016	
04014	HEWLETT PACKARD COMPANY	PO BOX 281058	ATLANTA	GA	30384-185		HEWLETT PACKARD COMPAN		01/27/2016	
07348	HEWLETT PACKARD ENTERPRISE	33153 COLLECTIONS CENTER	CHICAGO	IL	60695-3115		HEWLETT PACKARD ENTERP		06/21/2016	

Highlight the vendor to be used and click





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If a new vendor must be created, contact the Business Office to request the new vendor be added. Requisition will not be approved and converted to purchase orders until the vendor number is added.

If an attachment exists which needs to be associated with this requisition, click on the Add Attachment checkbox. After saving the requisition, the Attachment screen will be displayed.

Add Item

Date: 09/19/2017 Period: 7/18

Header Line Items

General Information

Requisition *	R180004	Add Attachment?	<input checked="" type="checkbox"/>
APPROVAL GROUP *	OHS - HIGH SCHOOL	Freight	
Requested	09/19/2017	Comments	
Required		Buyer	
Vendor	00001	Attention	
Vendor Address	ACME PRODUCTS (TEST) 123 ELM STREET	Ship To *	

Alternate Order Address

Use the comment field to indicate an "OPEN PO" or a project code . This will display in the "DESC." field of the purchase order.

Add Item

Date: 04/13/2018 Period: 7/18

Header Line Items

General Information

Requisition *	R180004	Add Attachment?	<input checked="" type="checkbox"/>
APPROVAL GROUP *	CLM - CLM	Freight	
Requested	09/19/2017	Comments	OPEN PO
Required		Buyer	
Vendor	1	Attention	
Vendor Address	ACME 1313 MOCKINGBIRD LANE	Ship To *	

Alternate Order Address

Select **LINE ITEMS** to add the detailed items to your requisition. (Field descriptions in **RED** are required fields). There is no item # field, for consistency enter the item # followed by a space-dash-space (123ABC – Textbook).

Tab through the fields to get to the “Pricing” section. Unit of Measure is not required. We highly encourage you to enter something. Below are some standard UoM.

UOM	Description	UOM	Description
BTL	Bottle	EA	Each
BX	Box	IN	Inch
CS	Case	FT	Foot
CTN	Carton	GAL	Gallon
DZ	Dozen	LB	Pounds



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Requisition Information - R170003 - TIES TEST 03232017

Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item

Date: 05/01/2017 Period: 9/17

Header Line Item (1 of 1)

Detail Information

Requisition: R170003 1 Status: ☐ Shipping Charge ☐ Continuous
Commodity: Stock Number:
Bid Item: ☐ Fixed Asset: ☐
Description: ENTER THE DESCRIPTION OF THE REQUESTED ITEM. CAP LOCKS IS NOT REQUIRED. ENTER AS MUCH OF A DESCRIPTION AS NEEDED.

Pricing

Measure: Extended Amount: 16.00 Tax Total: 0.00
Quantity: 1.00 Discount Percent: 0.0000 Total Price: 16.00
Unit Price: 16.0000 Trade/Discount: 0.00 Distribution Method: A - Amount
Shipping: 0.00 Distribution Template: [View Distribution Templates](#)

BUDGET CODE	Account	Account	Percentage	Amount
01005020000000	311		1.00	16.00
BUDGET CODE	Account			
01005020000000	311			

Total Charges: 16.00
Total Requisition: 16.00



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Clicking on “Shipping Charge” will add a line to the requisition with a description of “ESTIMATED SHIPPING/HANDLING”. Enter an amount and tab down to the BUDGET CODE field and enter a code if it did not auto-populate.

Header Line Item (3 of 3)

Detail Information

Requisition R180011 99

Commodity

Stock Number

Bid Item ☐

Fixed Asset ☐

Description * ESTIMATED SHIPPING/HANDLING

☒ Shipping Charge

Click on the tool bar for adding Notes which will be saved as additional information for this requisition. All notes will print in the body of the PO before the first line item.

Add Item Add a NOTE

Icons: Add, Delete, Print, Approve, Cancel, Add Note, Previous, Next, Save, Print



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Notes - ISD 272-TRAINING Mar 27 2018

Req No PO No Change No

This is a note to show how it will appear on the purchase order.
Add a carriage return after last line of type and click on OK.

Typing to this point will print the note within description field of purchase order

Purchase Order

eps_purchasing@edenpr

04/13/18		BUYER:		REQ. NO.: 0	
30 DAYS		F.O.B.:		DESC.:	
ITY	UOM	DESCRIPTION			UNIT PRICE
		This a note to show how it will appear on the purchase order. Add a carriage return after last line of type and click on OK.			

When completed with the detail line items for the Requisition, click on the SAVE icon. If not completed, and additional detail line item are still to be added, click on the SAVE IN PROGRESS icon.

Add Item

Save

Save in Progress



Upon saving, the Requisition will be routed for Approval...

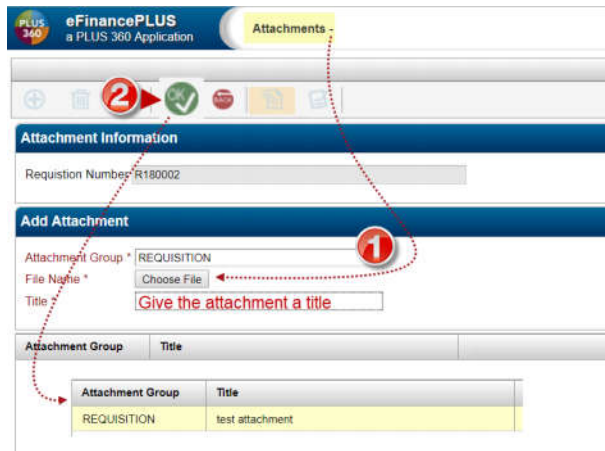


Requisition has been saved and routed for approval

The routing of requisition to purchase order is as follows:

Requisition Created > Budget Manager Approves > Business Office Approves > Converted to Purchase Order > Executive Director Business Services Approves > PO Printed > PO sent to creator of requisition.

If the ATTACHMENT box was checked, the Attachment screen will be displayed. Click on “Choose File” to browse to the location of the attachment for this requisition.



Attachment Group	Title
REQUISITION	test attachment

Standard Titles:

- Quote
- Send with Check*

*Once purchase order is generated, business office will process payment and include documentation with the check.