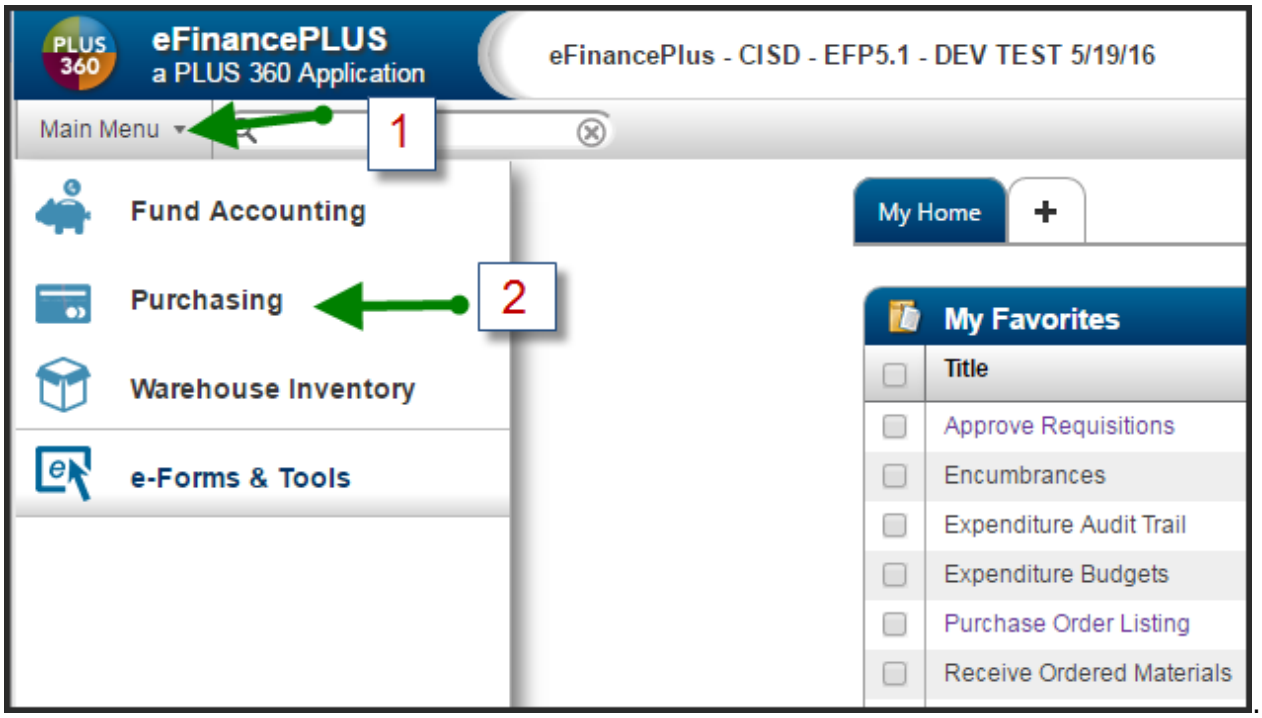
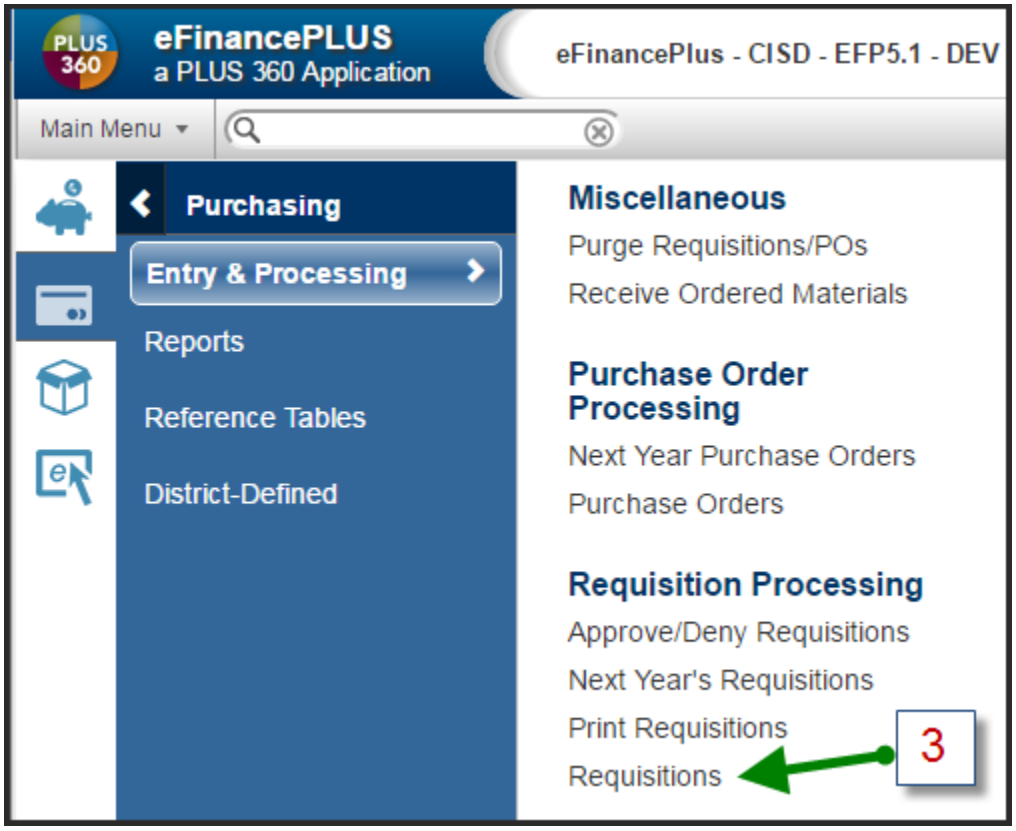
HOW TO ENTER A REQUISITION

On the Home screen in eFinancePlus choose Requisitions from your My Favorites Panel or navigate the menu as follows:

1. Hover over ***Main Menu***
2. Click on ***Purchasing***

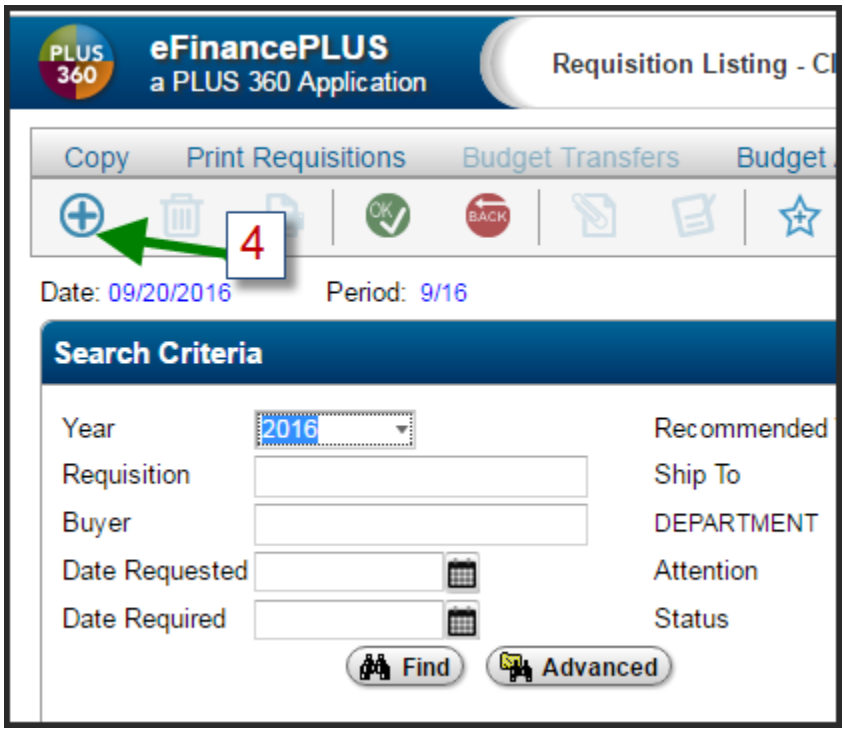


3. Click on ***Requisitions***

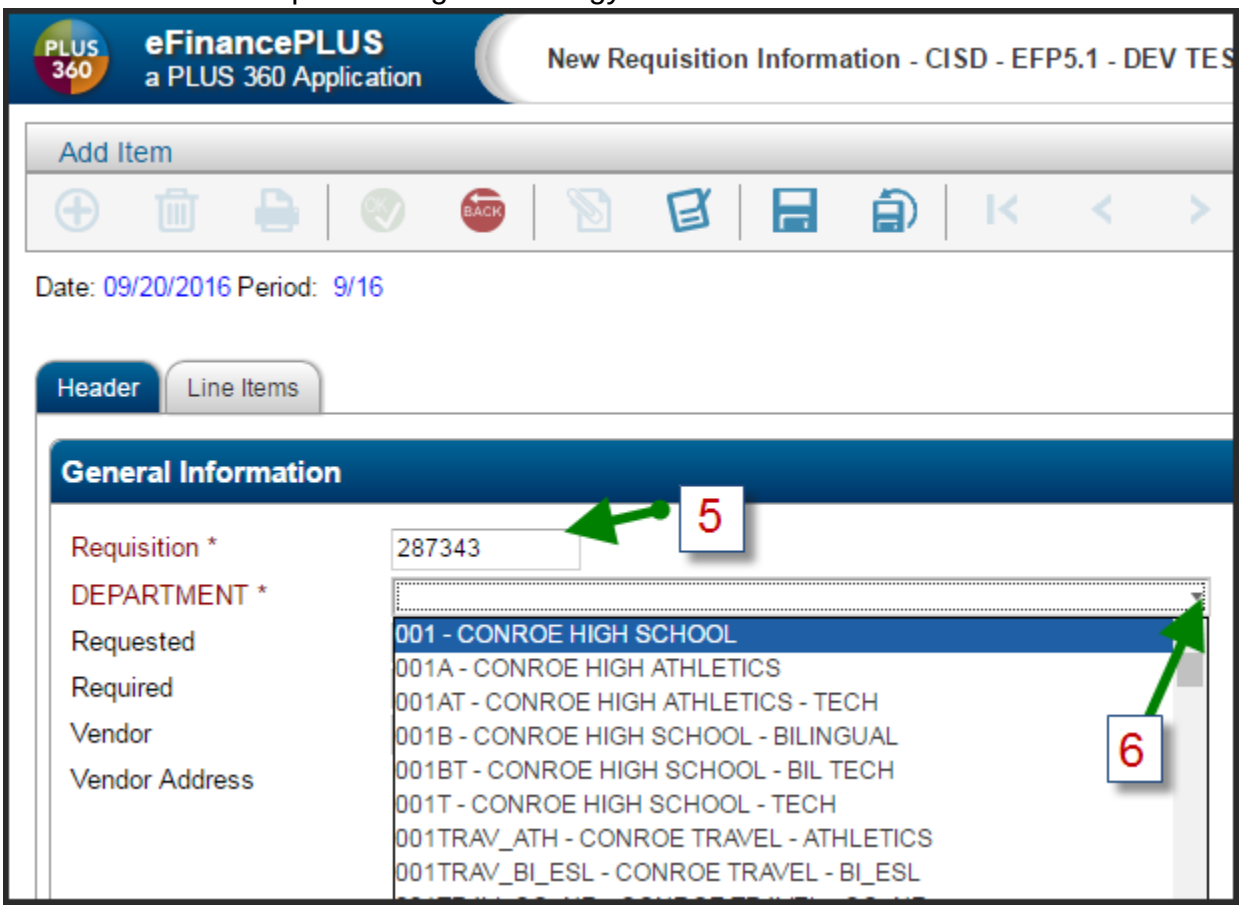


*Once on this screen, click on the icon in top menu to add to favorites.

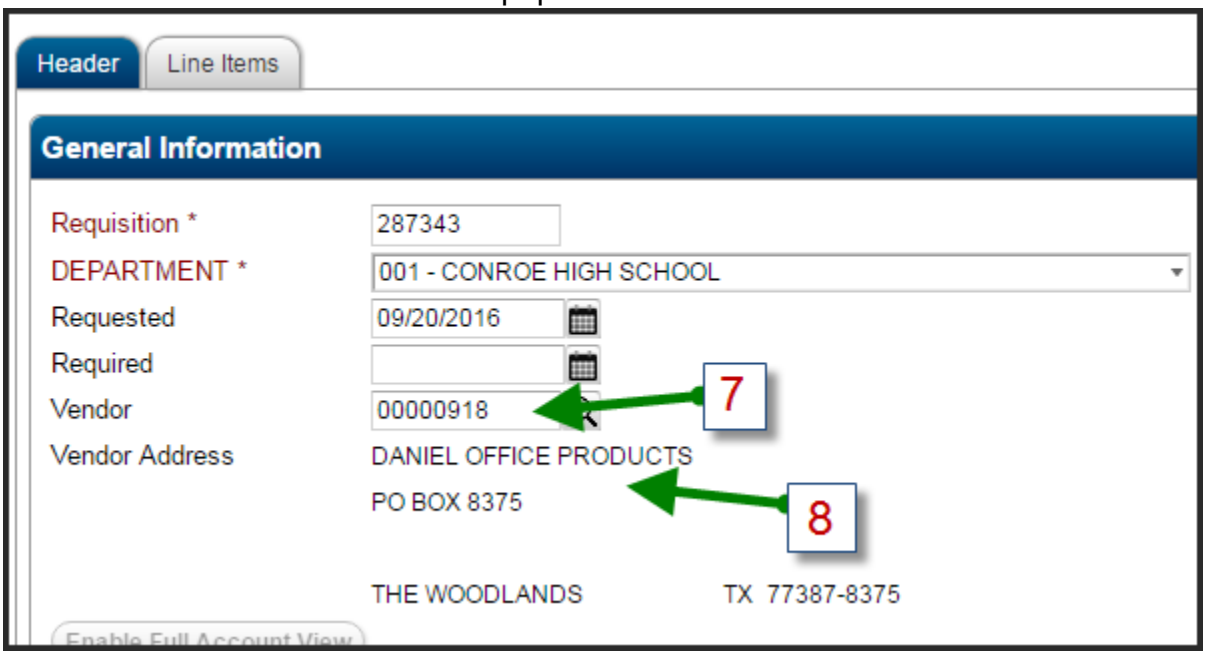
4. Click on the ***Add new*** icon to start a new requisition.



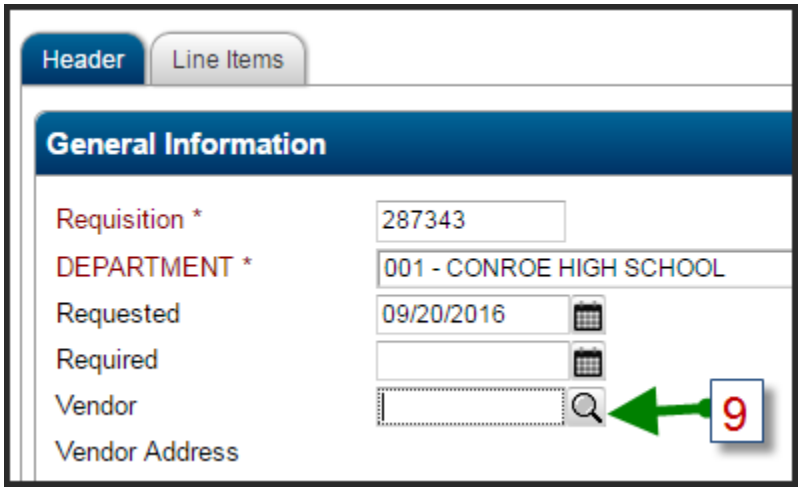
5. The Header screen will appear with a new Requisition number assigned.
6. Click on the drop down menu and choose your School/ Department code. Choose your department code with a B or F at the end (ex. 001B) if you are using Bilingual or Federal Funds. Choose T if purchasing Technology items or TRAV if travel.



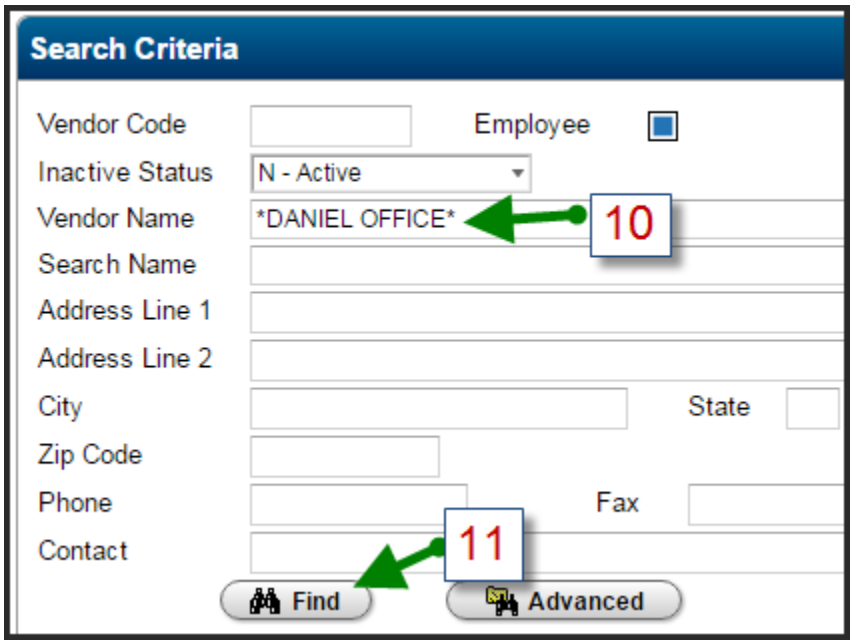
7. Enter the vendor number and tab to next field.
8. The vendor name and address will populate. Confirm that it is the correct vendor.



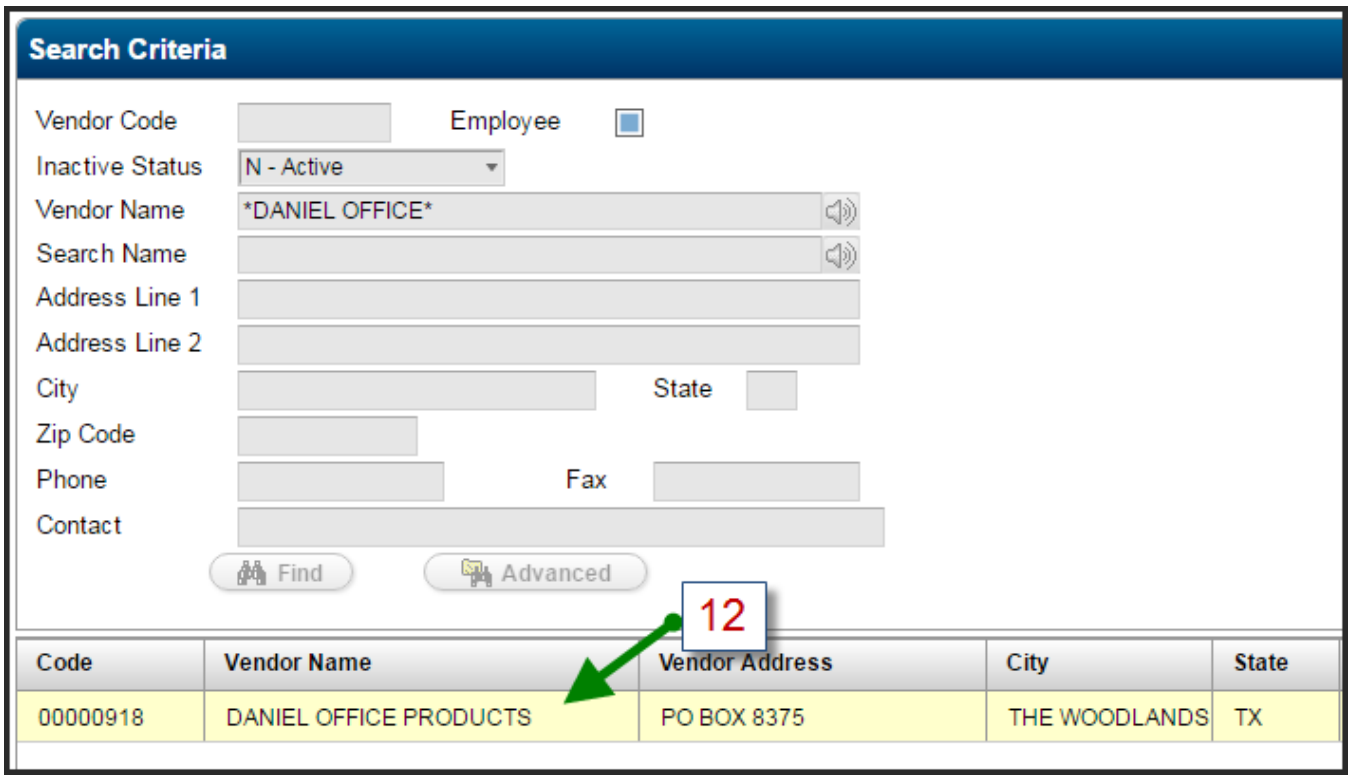
9. If you do not know the vendor number, you can click on the vendor search icon.



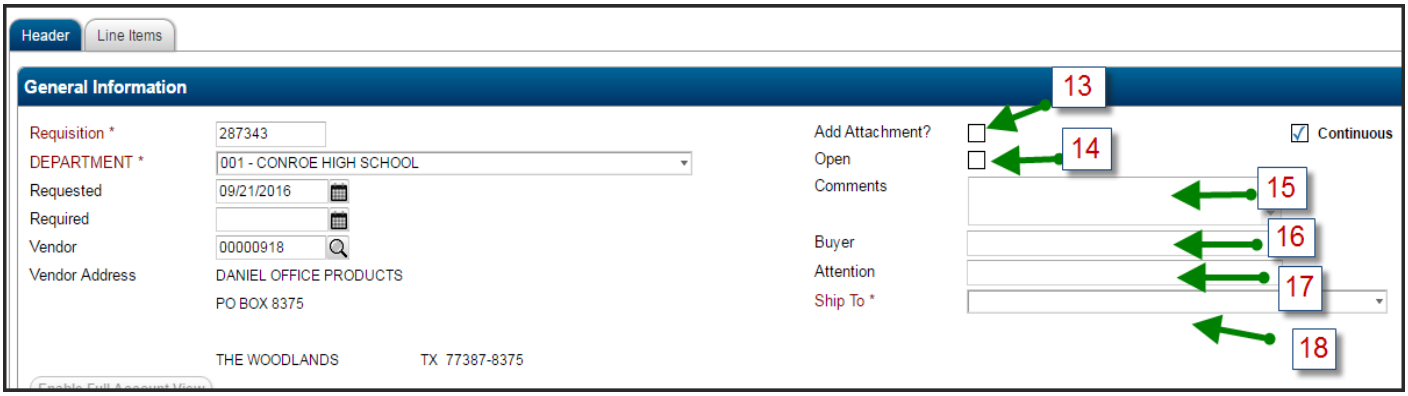
10. This will pull up a new screen. Enter the Vendor Name with an * before and or after the search criteria. The * tells the database to search everything with that criteria.
11. Click Find.



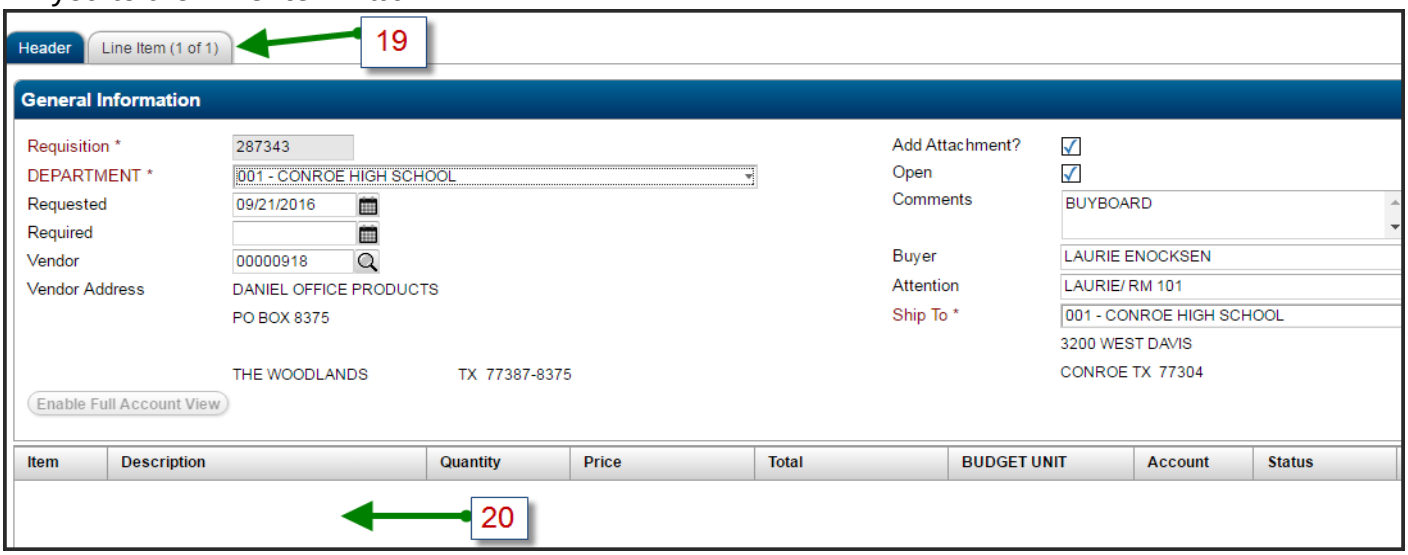
12. The database will show a list of vendors that match the search criteria. Highlight the correct vendor and double click on it. It will populate the Vendor information back in the requisition screen.



13. Click on the ***Add Attachment?*** Box if you will be adding an attachment to the requisition. Once you complete and save the requisition, the add attachment pop-up screen will appear. Instructions for this will be at the end.
14. Click on the ***Open*** box if this is an open PO.
15. The ***Comments*** box is for the Bid reference. The bid reference lists how the vendor is awarded. It is a CISD bid#, cooperative name such as EPIC6, Buyboard, etc. This information can be found on the CISD Awarded Vendor List. If not an awarded item, comments line should read Mileage, Travel Approval, Travel PO#, Specialty item. *Do not enter vendor quote # in this field.
16. ***Buyer*** – enter the full name of the person entering the requisition.
17. ***Attention*** – State who the warehouse will deliver the items to. Ex. Sue Smith/ RM 101.
18. ***Ship To*** – Click on the drop down menu and choose the correct ship to location.

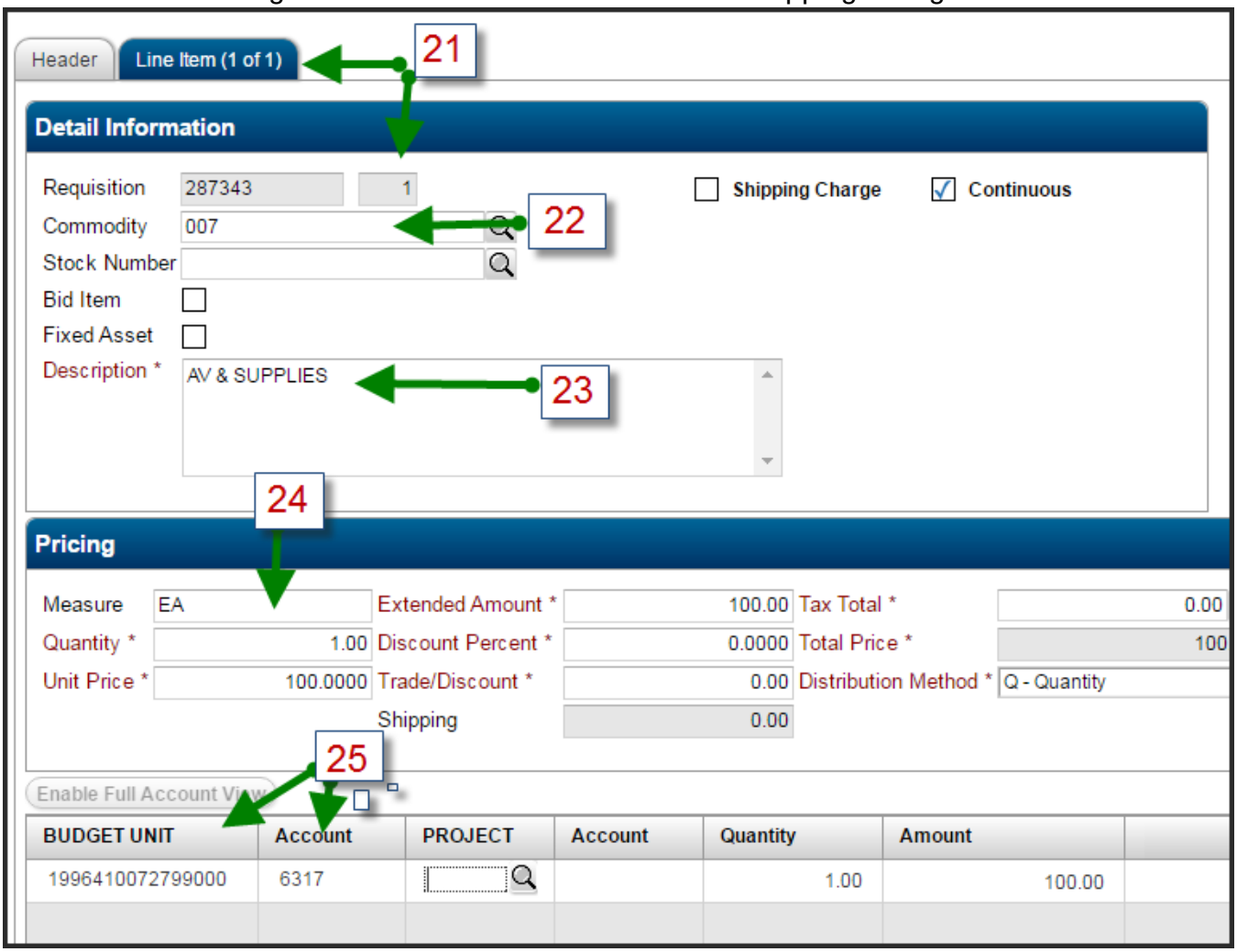


19. Once you have completed all fields in the ***Header Tab***, click on the ***Line Items Tab*** to continue.
20. Another option is to click somewhere down below the Item/ Description menu. It will take you to the ***Line Item Tab***.



21. The ***Line Item Tab*** is where you will enter the ***Detail Information*** and the ***Pricing/ Budget***. The tab tells you how many line items are in the requisition ex. (1 of 1). The line item you are currently on is always listed in the box to the right of the requisition number.
22. ***Commodity*** – enter the 6 digit commodity code with the dash. Ex. 750-001.
23. ***Description*** - When you enter the commodity this field auto-fills with the commodity description. Delete this information and enter the description of the item. When entering a description list the MFG/Model # first, then the description. The description has to tell us "what is it?" The description should match the quote. Ex: HP2069 – microphone cable. *Do not tab down to the next line in the comments field. Type in data field and let the system wrap the text. The main description should show on the 1st 2 lines of the text box.
24. Enter the ***Measure*** (ea., bx, st), the ***Quantity***, and ***Unit Price*** (price for 1). The system will fill in the extended Amount as you tab through these fields.
25. Enter the Budget Unit and Account code.

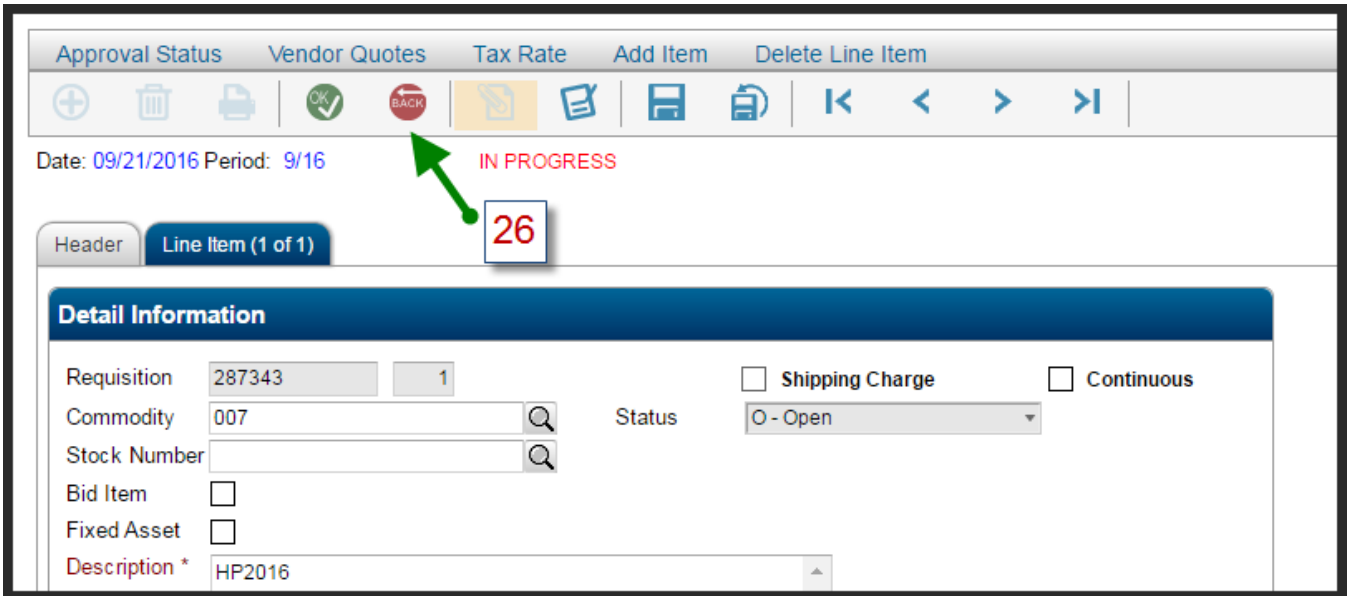
Click on the icon to finish the line and move to the next line. Repeat #22-25 for each additional line. The budget unit and account code will pre-fill with the budget you entered for line 1. You can change it if needed. Enter the last line as Shipping Charges.



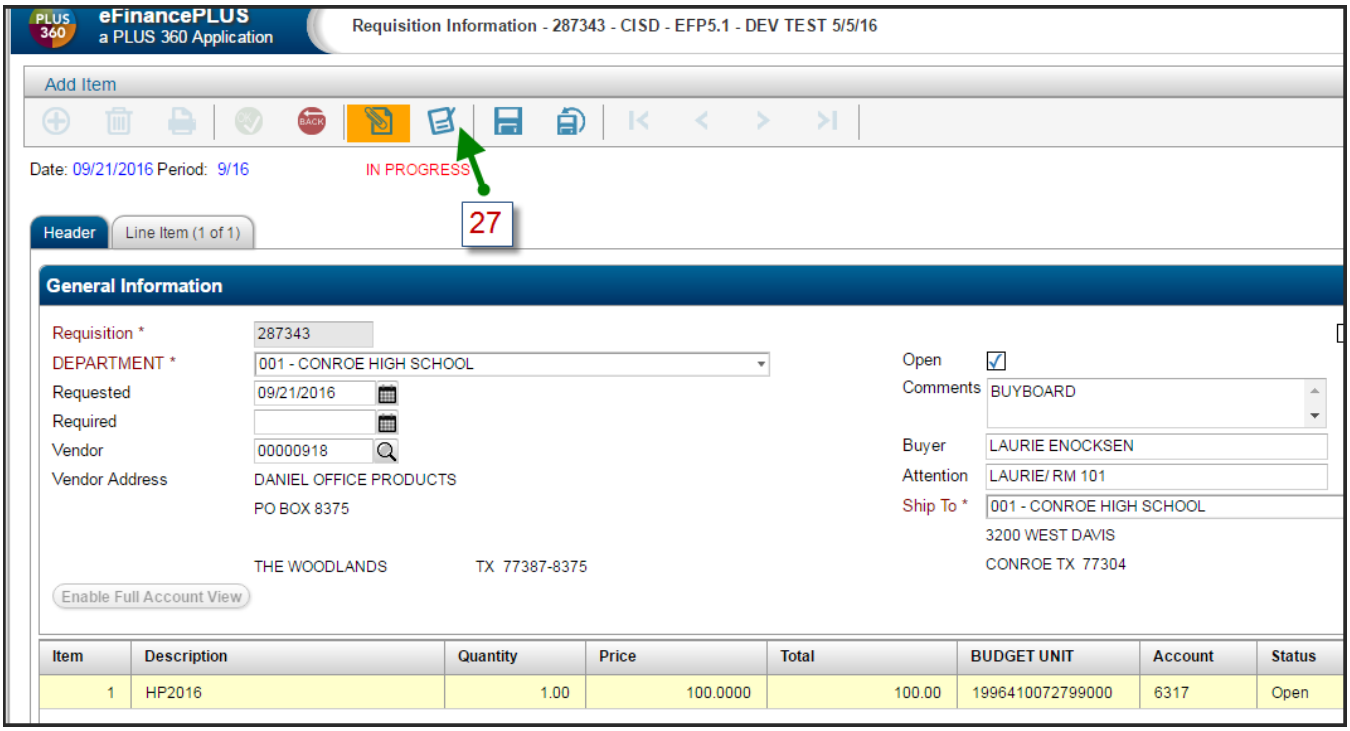
*If you do not click on when you complete the line and instead click the icon, the line will not be saved.

26. When you have entered all the lines click the  button to return to the header.

* Only click the back button once or you will back completely out of the requisition and lose your data.



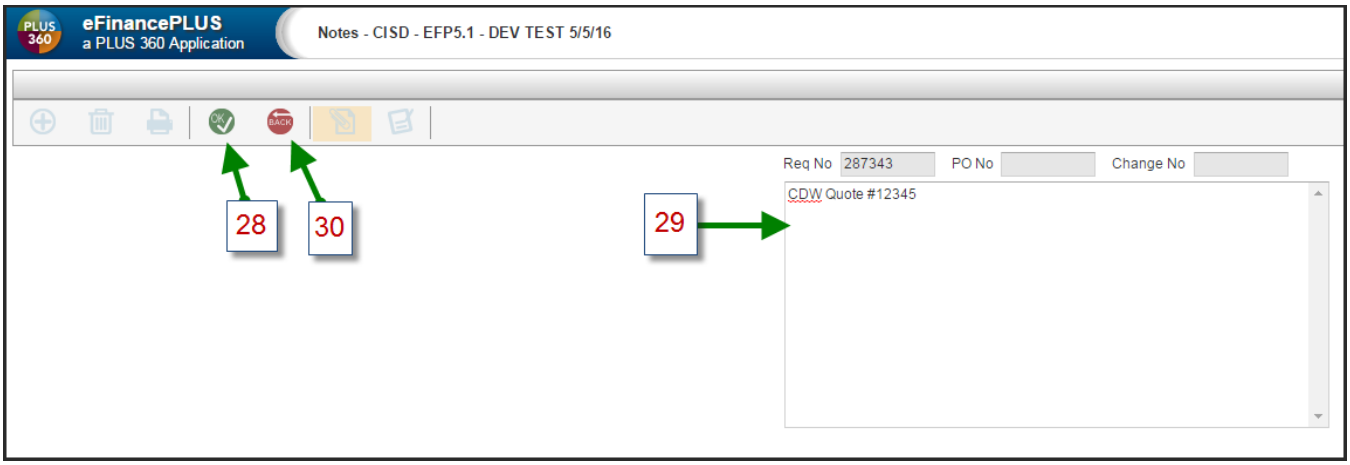
27. You are now back in the ***Header Tab***. Click on the blue  icon to go to the ***Notes*** field.



28. The ***NOTES*** window will appear. Click on the icon to open the text field.

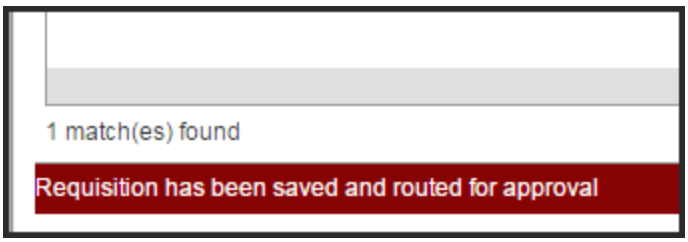
29. Type the required information. This field is for any information the vendor will need. Enter the vendor quote number, vendor delivery information, etc. *The warehouse does not see the Notes. Do not enter warehouse delivery instructions here.

30. Once you have entered all required information click on the icon to "save" the information then click on icon to return to the requisition entry screen.



Once your requisition is complete, click on the icon to ***SAVE*** the requisition.

You will get the following message at the bottom of the requisition screen.



You can also use the ***SAVE IN PROGRESS*** icon to save a requisition that is partially complete so that you can continue your requisition entry at a later time. You will see IN PROGRESS right below the menu. In the requisition listing screen the Status will show ***IN PROGRESS***.

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	DEPARTMENT	Amount	Status
287343	09/21/2016	2016	00000918	DANIEL OFFICE PRODUCTS	LAURIE ENOCKSEN	001	100.00	
287344	09/21/2016	2016				001	71.00	In Progress
287345	09/21/2016	2016	00000918	DANIEL OFFICE PRODUCTS		001	0.00	In Progress

*NOTE: The requisition will not be saved and routed for approval until you SAVE the requisition as shown above.

Don't forget to **ADD YOUR ATTACHMENTS**! Click on .
See How To Add Attachments instructions.
*Save all documents as a pdf before you add as an attachment.

By Laurie Enocksen 9-20-16