How to Create a Requisition

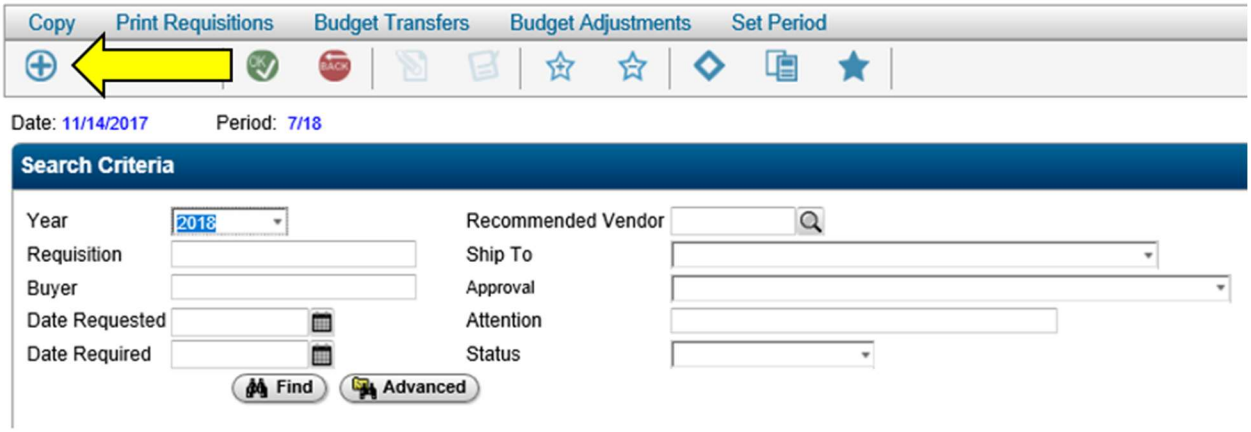
eFinancePLUS does not function well with Chrome, so it may be best practice to use Internet Explorer or Firefox.

Once logged into eFinancePLUS, click on “Main Menu” on the top left to bring a drop down list of options.

From the drop down click “Purchasing”, then “Entry & Processing”, and under “Requisition Processing” choose “Requisitions”.

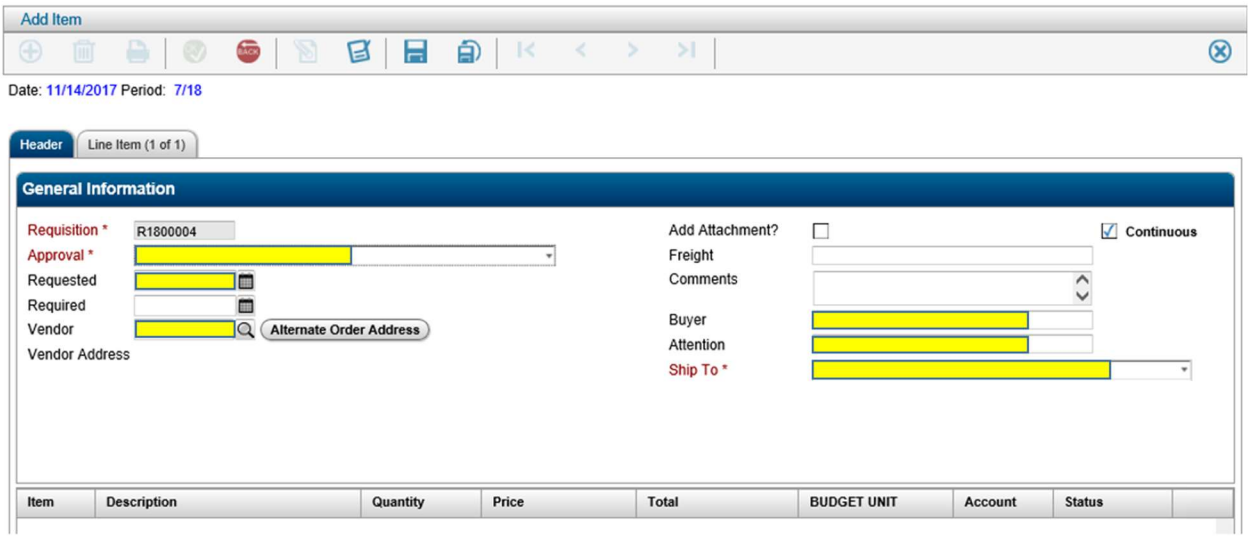
This will then open a new window and allow you to begin adding requisitions.

Click the “plus sign” at the top left to add a new requisition.



Enter the information in the “General Information” fields.

The highlighted fields in the example below are required to be filled in.

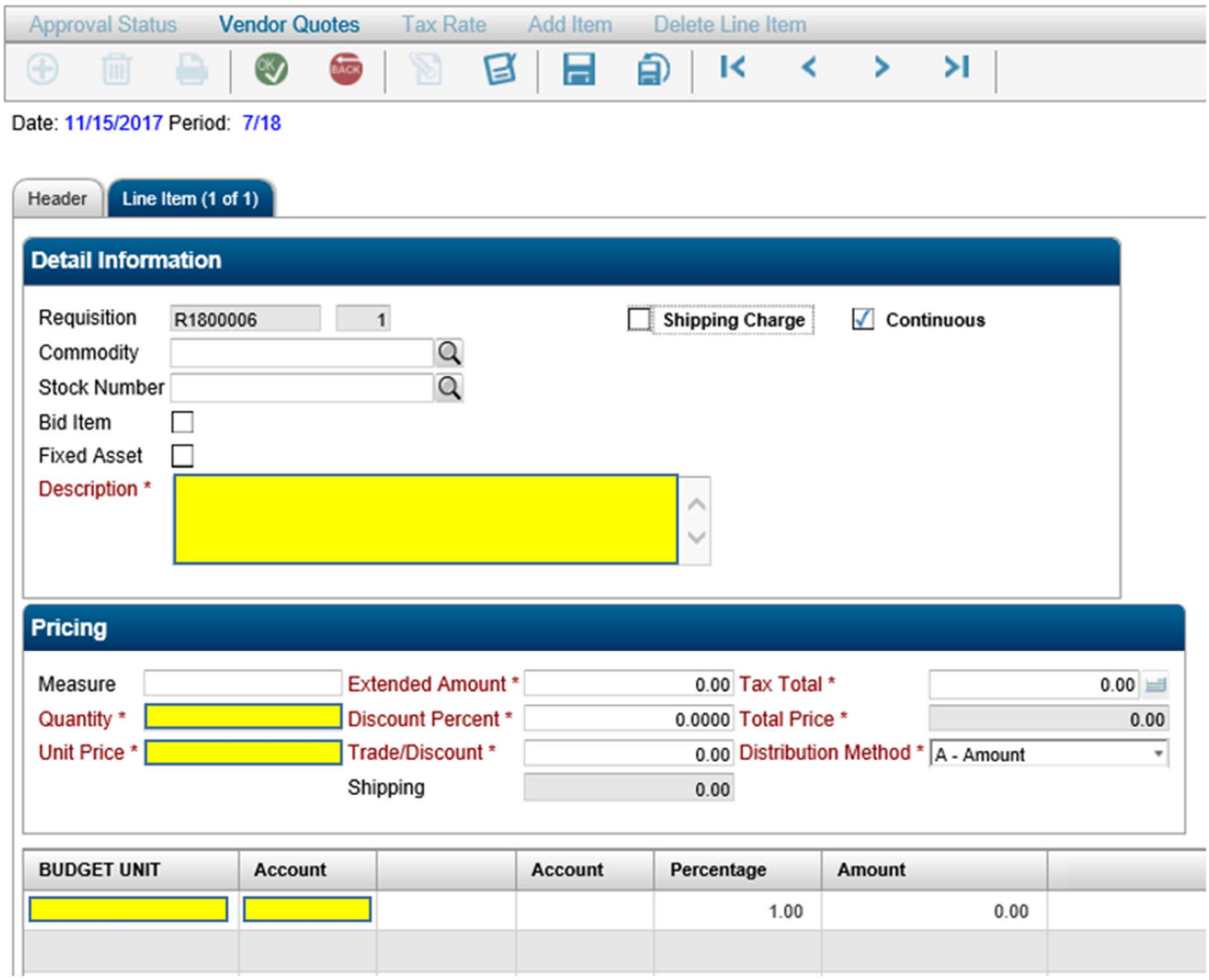


- **Requisition:** Will automatically prefill to the next number
- **Approval:** Choose your correct supervisor for approval
- **Requested:** Will automatically prefill to the current date
- **Required:** Can be left blank
- **Vendor:** If you do not know the vendor number, click the magnify glass to search for the name in the “Vendor Name” field. Always use the asterisk symbol (*) before and after the name of the vendor because the system is very sensitive to how it searches the vendor list. Ex.) *PLAY*. Click Find.
    - Once you have found the correct vendor double click the name or click once to highlight the vendor and select at the top.

- If you cannot find the vendor or need a new one added to the system, contact Mikala Carpenter in the Business Office.

- **Add Attachment?:** Select this box if you need to include supporting documents with the requisition
- **Continuous:** Check this box if you are entering more than one requisition or uncheck this box if you are only entering one requistion. If this box is accidentally left checked, click the red back button to get out of the new requisition screen.
- **Freight:** Leave this field blank
- **Comments:** Include how you want the order to be sent to the vendor (Fax, Email or Mail) or if have you included an attachment.
- **Buyer:** Enter your full first and last name.
- **Attention:** Enter your full first and last name.
- **Ship To:** From the dropdown, select where your items delivered should be delivered.

Once all the required "General Information" fields are filled out, click "Add Item" at the top left or click the "Line Items" tab. The highlighted fields in the example below are required to be filled in.



- Under "Detail Information"
  - Fill in the description box with the information pertaining to the line item. Be as detailed as possible. If the item you are ordering has an item number, be sure to include it. Ex.) Red Ballpoint Pens-#85462
  - If entering multiple line items, be sure the "Continuous" box is checked.
- Under "Pricing"
  - Quantity
  - Unit Price
  - Extended Amount and Total Price will automatically calculate.

    - Distribution Method should be left at “A-Amount”
- Budget Unit
    - Click in the field under “Budget Unit” and click the magnify glass. Then choose “Find” to search for the budget unit. Double click or click once to highlight and choose to select the appropriate budget unit.
    - Budget units are 16 digit codes which describe what type of activity the item is for.
    - Most staff will have a few budget units available to select.
    - Do not select budget units with “REV” or “SAL” in the description as these are for requisitions.
- Account
    - Click in the field under “Account” and click the magnify glass. Then choose “Find” to search for the account. Double click or click once to highlight and choose to select the appropriate account.
    - Accounts are three digit numbers beginning with 4, 5, or 6
    - Choices are limited based on the Budget Unit selected.
    - Accounts beginning with 4 are purchased services (presenters, speakers, repairs, service contracts, travel, etc.)
    - Accounts beginning with 5 are supplies (physical items **under** $2,500)
    - Accounts beginning with 6 are equipment (physical items **over** $2,500)

To add a shipping line to your requisition if it is needed, Click to open up another line item and select the “Shipping Charge” box and enter the amount into the shipping field.

- Estimate 15% if shipping is not specified or known.
- **ALL** Amazon orders need to have a shipping line of at least 20% of the requisition total.

Once all the required fields are filled in, hit enter or click ; if you have the “Continuous” box checked this will allow you to enter the next line item. You will do this for as many items you are ordering. If the “Continuous” box is unchecked, it will take you to an overview. If this box is accidentally left checked, click the red back button to get out of entering a new line item.

When on the overview screen, you can include a note for your supervisor if need be. Click on the top tool bar. Click to enter your note. Click again to save the note.

If you need to correct an item or amount, click on the line item to highlight it and click or double click the line item. Then click again to save the changes.

Once the requisition is completed, there are (2) two options to save at the top:

- Allows you to save your requisition and return to finish later.
- Submits the requisition in the approval workflow.

If you had selected the “Add Attachment?” at the beginning, you will be prompted to add the attachment once the requisition is fully submitted. You will leave the “Attachment Group” as Requisition and then upload the attachment and title in in the appropriate fields. Click when ready to submit. You will see “File uploaded successfully” at the bottom of the screen letting you know the file was attached to the requisition. Click the red Back button to exit the requisition. It will route you back to the beginning of the requisition process.