

eFinance Plus

How to Input Requisitions

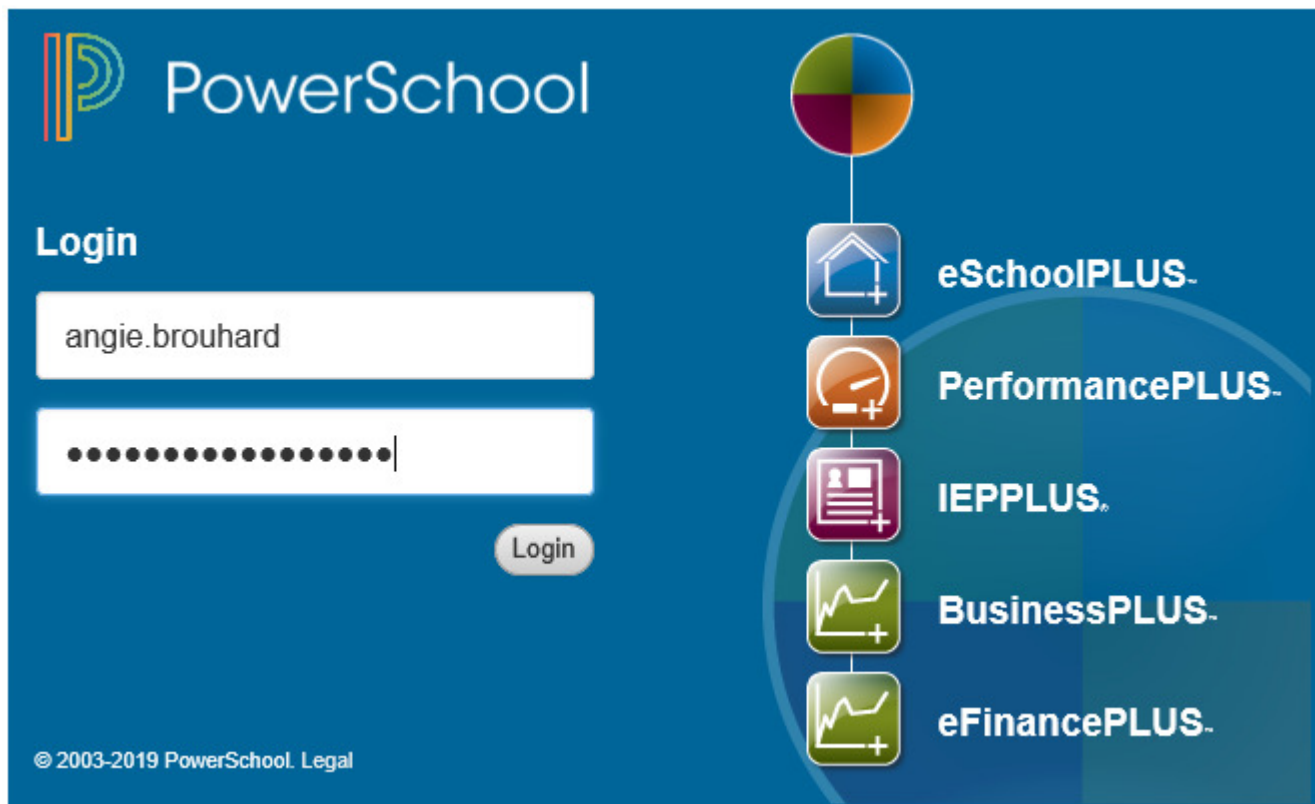
Go to WOCO's website: <https://www.woco-k12.org/>

- Click on QuickLinks > eFinancePlus

Log In - (first time users go to page 2)

- Username: firstname.lastname
- Password: If you forget your password (see page 2)

Log In Screen

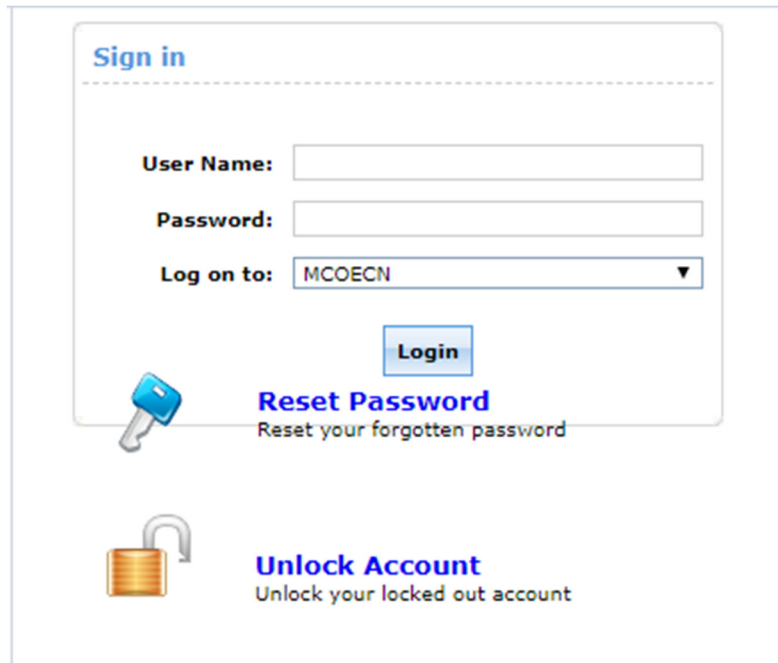


The image shows the PowerSchool login screen. On the left, there is a 'Login' section with a username field containing 'angie.brouhard' and a password field with masked characters. A 'Login' button is below the password field. On the right, there is a vertical menu of application icons: a circular icon at the top, followed by eSchoolPLUS (house icon), PerformancePLUS (gauge icon), IEPPLUS (document icon), BusinessPLUS (line graph icon), and eFinancePLUS (line graph icon). The background is blue with the PowerSchool logo at the top left. At the bottom left, it says '© 2003-2019 PowerSchool. Legal'.

Forget your password?

Go to WOCO's website: <https://www.woco-k12.org/>

- Click on QuickLinks > efp password reset > Reset Password
- The password must be 14 characters (1 is a number, special character, capital letter)



The image shows a web interface for logging in and resetting a password. At the top, it says "Sign in". Below this are three input fields: "User Name:", "Password:", and "Log on to:". The "Log on to:" field has a dropdown menu with "MCOECN" selected. To the right of the "Log on to:" field is a "Login" button. Below the "Login" button is a "Reset Password" link with a key icon and the text "Reset your forgotten password". Below the "Reset Password" link is an "Unlock Account" link with a padlock icon and the text "Unlock your locked out account".

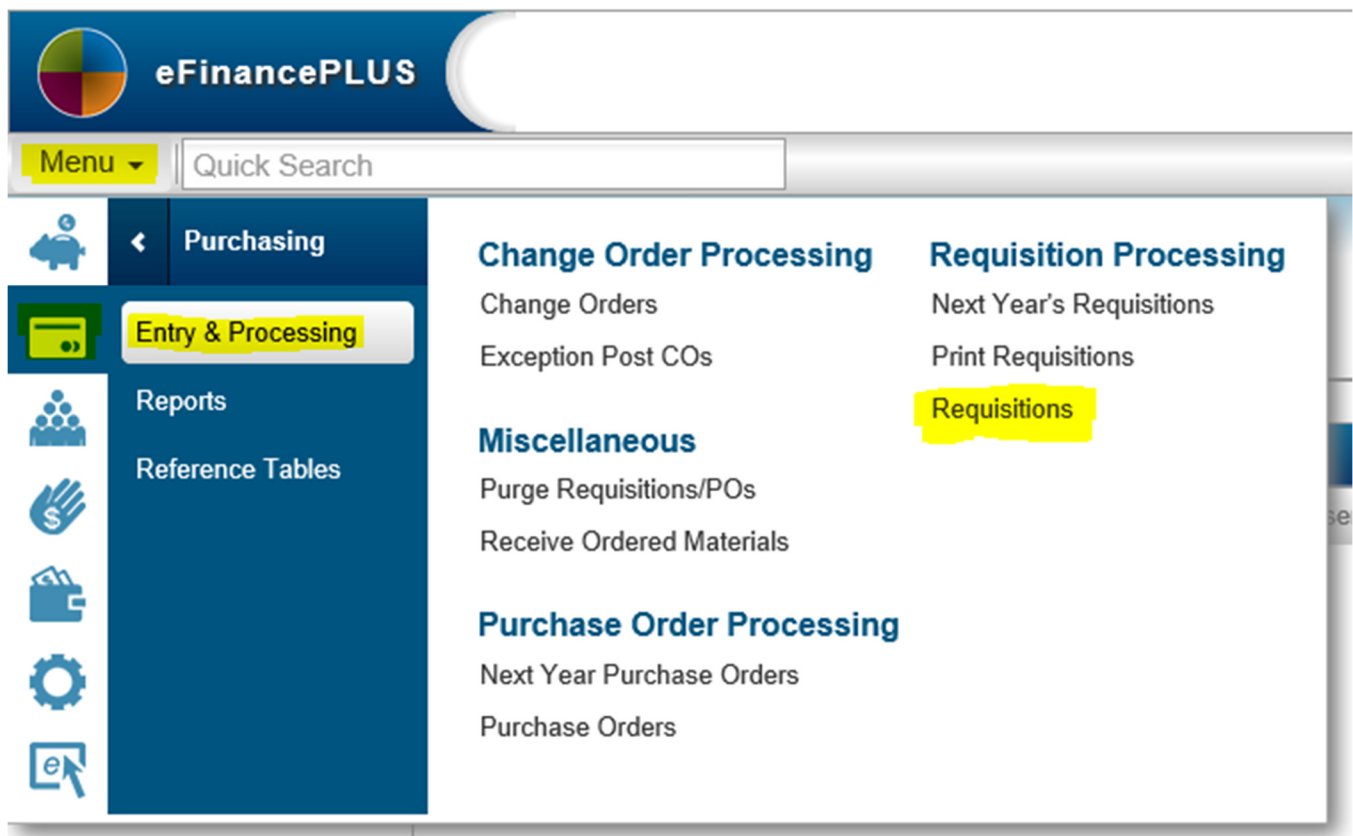
After resetting your password

Go to efp plus website: <https://efp.managementcouncil.org/>

- Click "OK" on the first page

Requisitions

Top Left corner > Click on Menu > Purchasing  Icon > Requisitions















New Requisition

Click on the plus sign in the top left corner

When entering information, it is recommended to use the tab key to move from field to field

***Note: The year should be 2020 fiscal year**



Copy Print Requisitions Budget Transfers Budget Adjustments Set Period

Date: 04/17/2019 Period: 1/20

Search Criteria

Year	<input type="text" value="2020"/>	Recommended Vendor	<input type="text"/>
Requisition	<input type="text"/>	Ship To	<input type="text"/>
Buyer	<input type="text"/>	Approval	<input type="text"/>
Date Requested	<input type="text"/>	Attention	<input type="text"/>
Date Required	<input type="text"/>	Status	<input type="text"/>

 Find  Advanced

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	Approval
-------------	------	-------------	----------	-------------	-------	----------

New Requisition - Initial Screen

Check the “Continuous” box if you have more than one requisition to enter **Or** Un-Check if you only have one requisition to enter

- ***All yellow highlighted areas will need to be filled out**

Enter the **Vendor** number. If you do not know the vendor number, use the vendor search “**magnifying glass**”.

- Then proceed to page 6 to look up the vendor

Requisition number is set automatically

Select the Approval from the drop down


Add Attachment: Click the Add Attachment if you want to attach a document such as an order form or contract

Comments: Add a brief description of what you are requesting to purchase

Buyer: Put your name













Attention: Put your name (or the name of the individual you are doing the requisition for)

Ship To: Select the delivery address from the drop down menu to your building

 eFinancePLUS

New Requisition Information - Madison Champaign ESC - Live

Add Item



Date: 08/08/2019 Period: 2/20

HeaderLine Items

General Information

Requisition *R2000011

Add Attachment?☐

☒ Continuous

Approval *SPEECH - SPEECH

Freight

Requested08/08/2019

Comments

Required

Buyer

Vendor

Attention

Vendor Address

Ship To *

Alternate Order Address

ESC - MADISON CHAMPAIGN ESC

2200 S. US HIGHWAY 68

URBANA, OH 43078

Enable Full Account View

Item	Description	Quantity	Price	Total	BUDGET UNIT	Account	Status
------	-------------	----------	-------	-------	-------------	---------	--------

New Requisition - Vendor Search

Enter any part of the vendor name in the Vendor Name field, with * before and after the name
Or leave the Vendor Name blank (**Caution: this will show all vendors**) and click the Find Button with the binoculars

Double click on the correct vendor or click "OK" to select the vendor

If you do not see the vendor you need, please send an e-mail with the vendor information to the Treasurer's Office - **need W9 information - could take up to 3 days to process**

eFinancePLUS Vendor Search - Madison Champaign ESC - Live

Search Criteria

Vendor Code Employee ☐

Inactive Status

Vendor Name

Search Name

Address Line 1

Address Line 2

City State

Zip Code

Phone Fax

Contact

Code	Vendor Name	Vendor Address	City	State	Zip	Phone Number	Search Name
1186	PNC BANK N.A.	P.O. BOX 821523	PHILADELPHIA	PA	19182-1523		PNC BANK PROCESSING
9008	PNC BANK CREDIT CARD PURCHASE			OH			PNC

New Requisition - Adding Items

Click "Add Item" to enter items being purchased to the requisition in the top left

eFinancePLUS New Requisition Information - Madison Champaign ESC - Live

Date: 08/08/2019 Period: 2/20

Header Line Items

General Information

Requisition *

Approval *

Requested

Required

Vendor

Vendor Address

Add Attachment? ☐

Freight

Comments

Buyer

Attention

Ship To *
2200 S. US HIGHWAY
MARIETTA OH 43040

New Requisition - Description, Pricing, Continuous

***Note** - When entering information, it is recommended to use the tab key to move from field to field

Description: Enter the description of the item or service to be purchased


Quantity: Number of items being purchase at the Unit Price to be entered

Unit Price: Enter the price per item being purchased

Extended Amount: Automatically calculated

Continuous: Check the continuous box if there are more items to be entered

Distribution Method: If you need to split items between different budget units and accounts - use the drop down for options

 **eFinancePLUS**

New Requisition Information - Madison Champaign ESC - Live















Approval Status

Vendor Quotes

Tax Rate

Add Item

Delete Line Item




Date: 08/08/2019 Period: 2/20


Header

Line Item (1 of 1)

Detail Information



Requisition R2000011 1 ☐ Shipping Charge ☒ Continuous

Commodity 

Stock Number 

Bid Item ☐

Fixed Asset ☐

Description * 

Pricing


Measure

Extended Amount *

0.00

Tax Total *

0.00



Quantity *

0.00

Discount Percent *

0.0000

Total Price *

0.00

Unit Price *


0.0000

Trade/Discount *

0.00

Distribution Method *

A - Amount



Shipping

0.00

New Requisition - Budget Unit

Enter the Budget Unit. If you do not know the Budget Unit, click the magnifying glass to search (see below).

Pricing

Measure		Extended Amount *	1.00	Tax Total *	0.00
Quantity *	1.00	Discount Percent *	0.0000	Total Price *	1.00
Unit Price *	1.0000	Trade/Discount *	0.00	Distribution Method *	A - Amount
		Shipping	0.00		

Enable Full Account View

BUDGET UNIT	Account	Account	Percentage	Amount
			1.00	1.00

New Requisition - Budget Unit Search by One of the Following....

Budget Units are a string of number assigned to each individual or program.

The search will only show the Budget Units that are available to you. You can limit the search by entering known number with an *

If you do not know any of the numbers, leave the Key Organization blank > Click "Find". Highlight the account and click "OK"

OR

You can Search by **Title** by entering the known word with * before and after the known word > Click "Find". Highlight the account and click "OK"

OR

Leave Everything Blank and Click "Find"

eFinancePLUS

Organization Search - Madison Champaign ESC - Live

+

✖

📄

OK

BACK

🔍

📄

📄

Search

Year	2020
Key Organization	
Level	
Title	*SPEECH*
Default Project	

Find

Advanced

Year	Key Organization	Level	Title	Default Project
20	0010002150160000	7	SPEECH	
20	0010002150160007	7	SPEECH - WHIP	

New Requisition - Account

Enter the Account. If you do not know the Account, click the magnifying glass to search (see below).

Pricing					
Measure	<input type="text"/>	Extended Amount *	<input type="text" value="1.00"/>	Tax Total *	<input type="text" value="0.00"/>
Quantity *	<input type="text" value="1.00"/>	Discount Percent *	<input type="text" value="0.0000"/>	Total Price *	<input type="text" value="1.00"/>
Unit Price *	<input type="text" value="1.0000"/>	Trade/Discount *	<input type="text" value="0.00"/>	Distribution Method *	<input type="text" value="A - Amount"/>
		Shipping	<input type="text" value="0.00"/>		

[Enable Full Account View](#)

BUDGET UNIT	Account	Account	Percentage	Amount
0010002150160021	<input type="text" value="1"/>		1.00	1.00

New Requisition - Account Search

Enter the first digit of the account, if you know it, followed by an *. The first digit for several categories are listed below.

Purchased Service (includes travel) - 4* Supplies - 5* Equipment - 6* Other - 8*

Our most commonly used accounts are: **431** - Travel

439 - Professional Development

510/511/512 - Supplies

If you click Find with the Account Field blank, all available accounts will be listed

Highlight the proper account and click OK or double click on the correct account

Account List - Madison Champaign ESC - Live

Search

Account

Title

1st Subtotal

2nd Subtotal


3rd Subtotal

Find Advanced

Account	Title	1st Subtotal	2nd Subtotal	3rd Subtotal
431	CERTIFICATED TRAVEL REIMB	400	430	
439	OTHER TRAVEL/MTG EXPENSE	400	430	

New Requisition - Finishing the Item

Once all information has been entered, click the OK button to save the item.

 **eFinancePLUS**

New Requisition Information - Madison Champaign ESC - Live


Approval Status


Vendor Quotes


Tax Rate


Add Item


Delete Line Item






































Date: 08/08/2019 Period: 2/20

Header

Line Item (1 of 1)

Detail Information

Requisition


R2000011

1


☐ Shipping Charge

☒ Continuous

Commodity



Stock Number



Bid Item


☐


Fixed Asset

☐

Description *

BROHARD 8-9-19 MEETING





***Note - To add additional items, click Add Item and repeat the step for entering at item. Click "OK" when finished to save.**

- If there are shipping charges involved, click the Shipping Charge box and enter an estimated shipping charge

New Requisition - Posting the Requisition - Save or Save In Process

The floppy disk is “Save” - If the requisition is complete, press this button and it will be routed to your Supervisor.

The floppy disk with the arrow is “Save in Process” - If the requisition is not complete and you want to finish it later, click this button and it will save without being routed to your Supervisor.

eFinancePLUS New Requisition Information - Madison Champaign ESC - Live

Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item

OK BACK Search Save Save in Process Navigation

Date: 08/08/2019 Period: 2/20

Header Line Item (1 of 1)

Detail Information

Requisition: R2000011 1 Shipping Charge: ☐ Continuous: ☒

Commodity: Status: O - Open

Stock Number: Bid Item: ☐

Fixed Asset: ☐

Description *: BROHARD 8-9-19 MEETING

New Requisition - Copy a Previously Entered Requisition

If a requisition is needed for a similar order that was placed previously, you can save time by copying a requisition

Click “Copy” in the upper left corner of the screen

Click “Find” to find the purchase order you want to copy, edit and save

eFinancePLUS Requisition Listing - Madison Champaign ESC - Live

Copy Print Requisitions Budget Transfers Budget Adjustments Set Period

OK BACK Search Save Save in Process Navigation

Date: 08/08/2019 Period: 2/20

Search Criteria

Year: 2020 Recommended Vendor: Ship To: Approval: Attention: Status:

Requisition: Buyer: Date Requested: Date Required:

Find Advanced