eFinance Plus

<u>How to Input Requisitions</u>

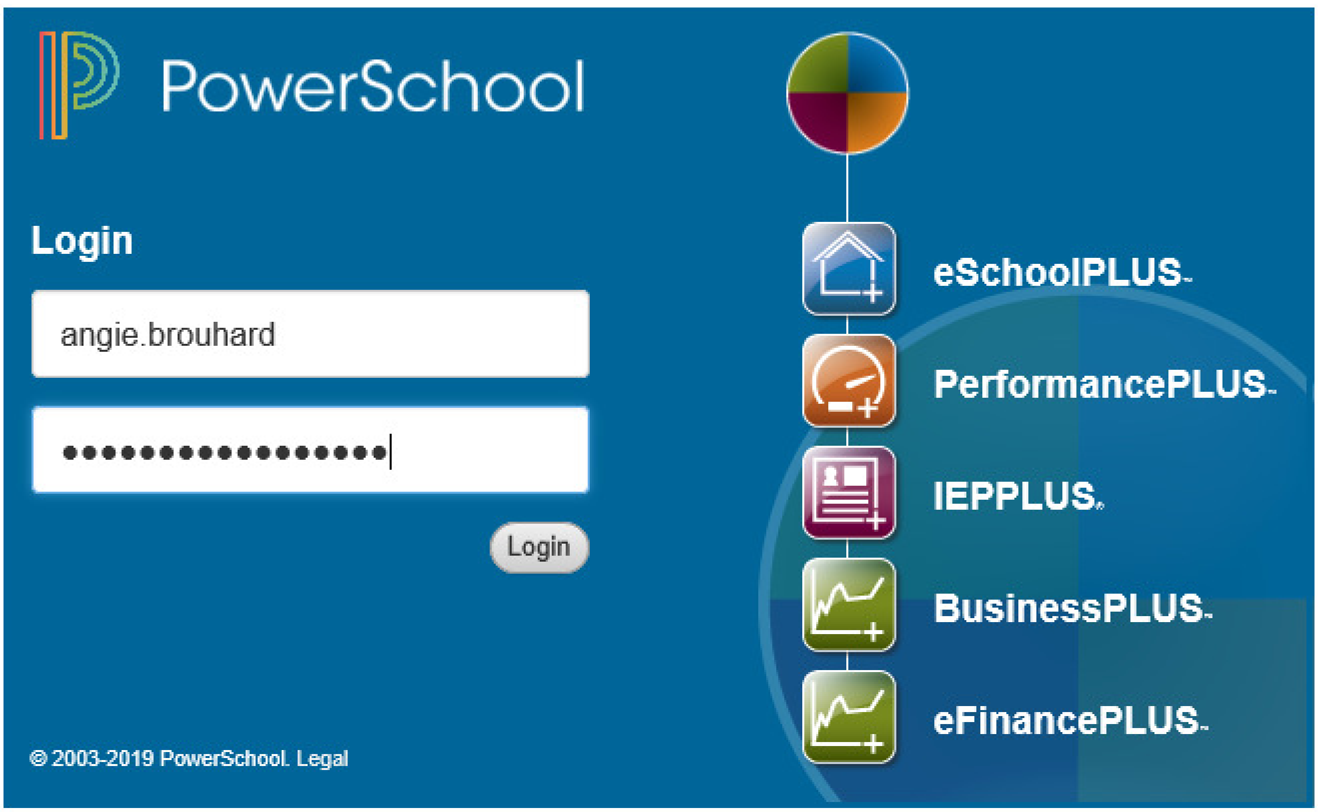
Go to WOCO's website: https://www.woco-k12.org/

- Click on QuickLinks > eFinancePlus

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

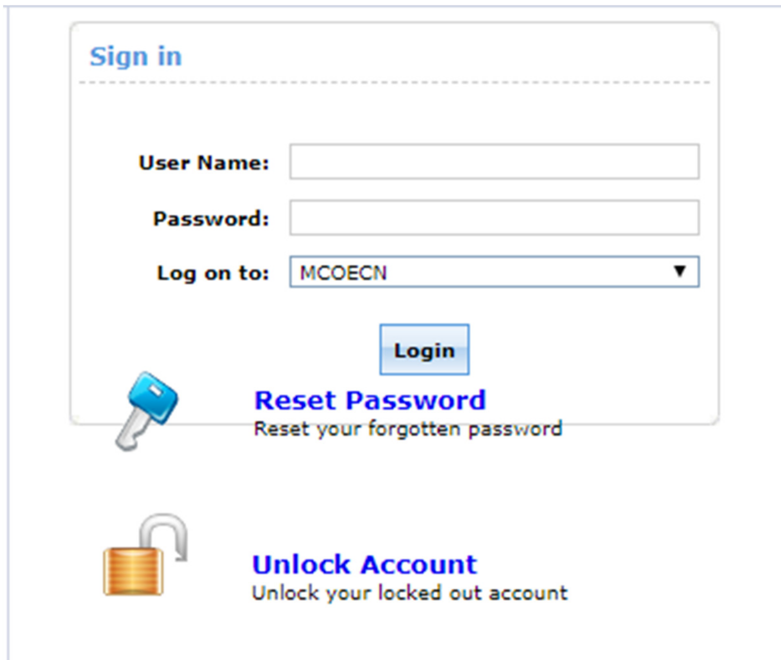
- <u>Username:</u> firstname.lastname
- <u>Password:</u> If you forget your password (see page 2)

Log In Screen



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)

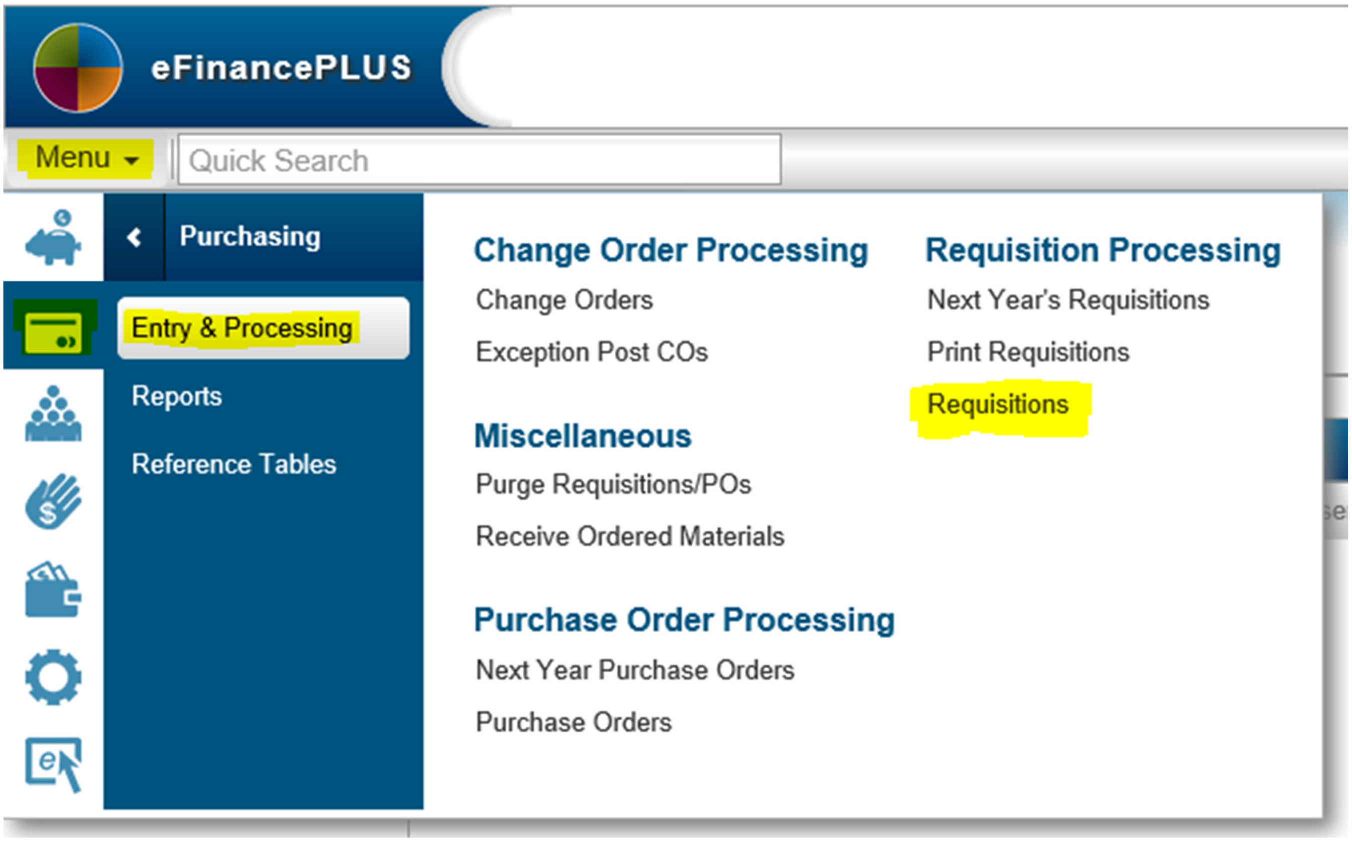


After resetting your password
Go to efp plus website: https://efp.managementcouncil.org/

- **Click "OK" on the first page**

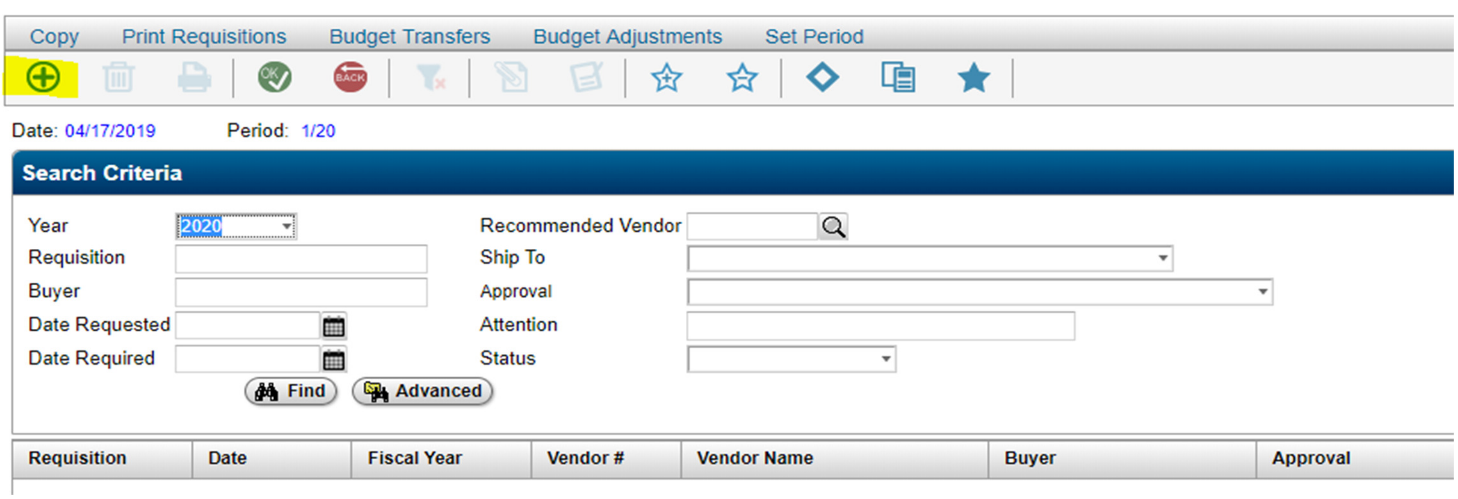
Requisitions

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**



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

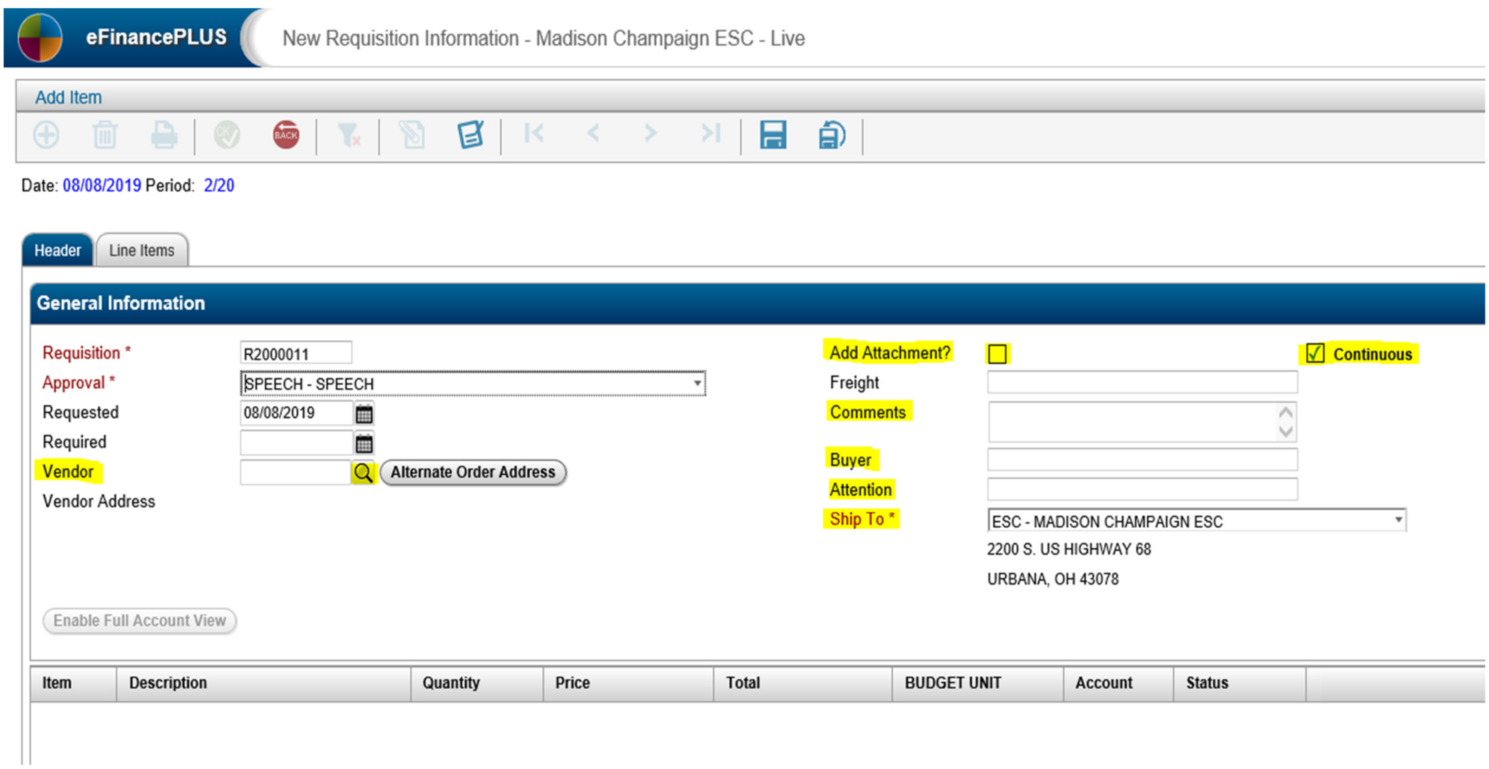
Add Attachment: Click the Add Attachment if you want to attach a document such as an order form or contract

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

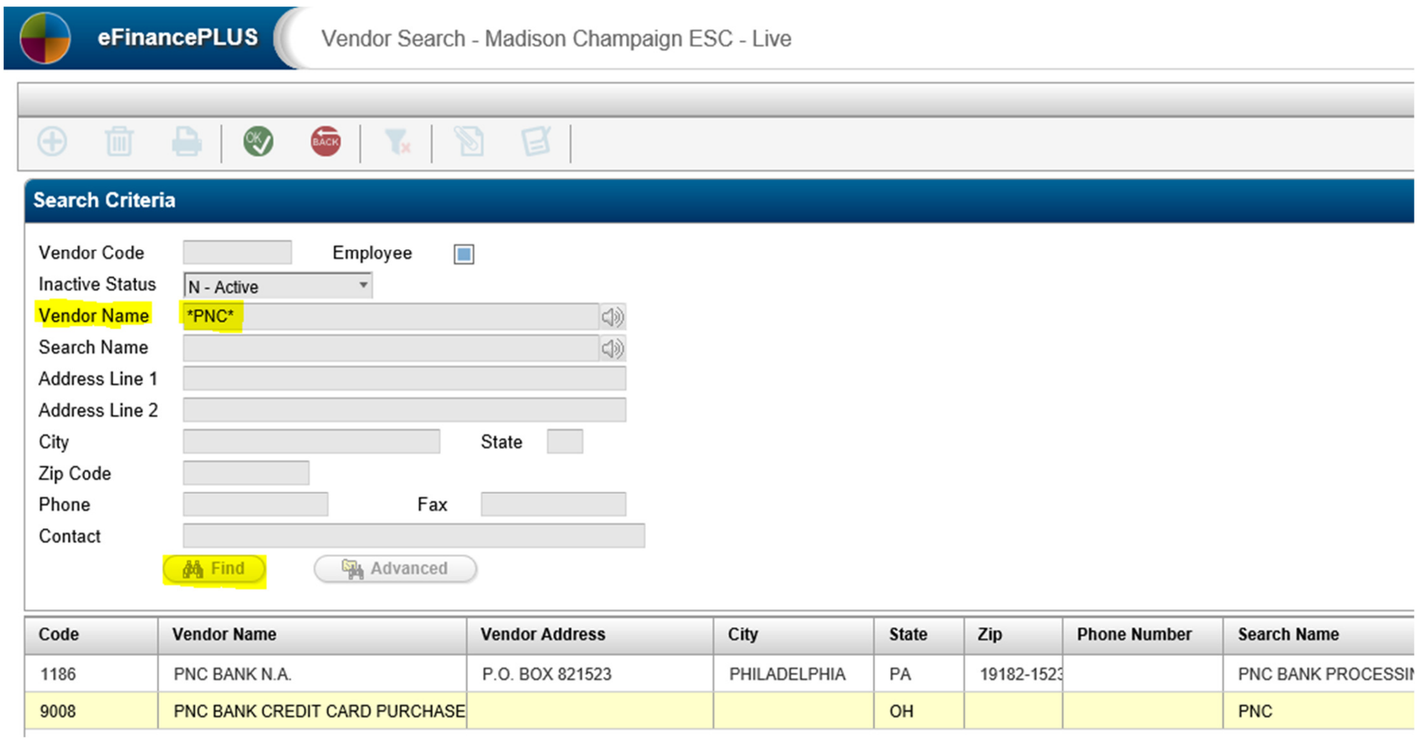


New Requisition - Vendor Search

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

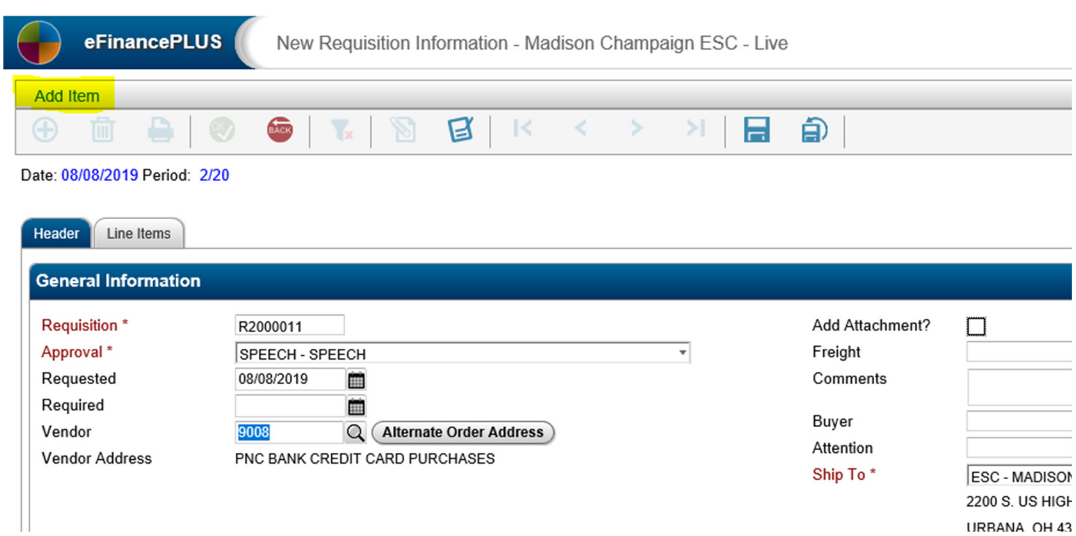
Double click on the correct vendor or click “OK” to select the vendor

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**



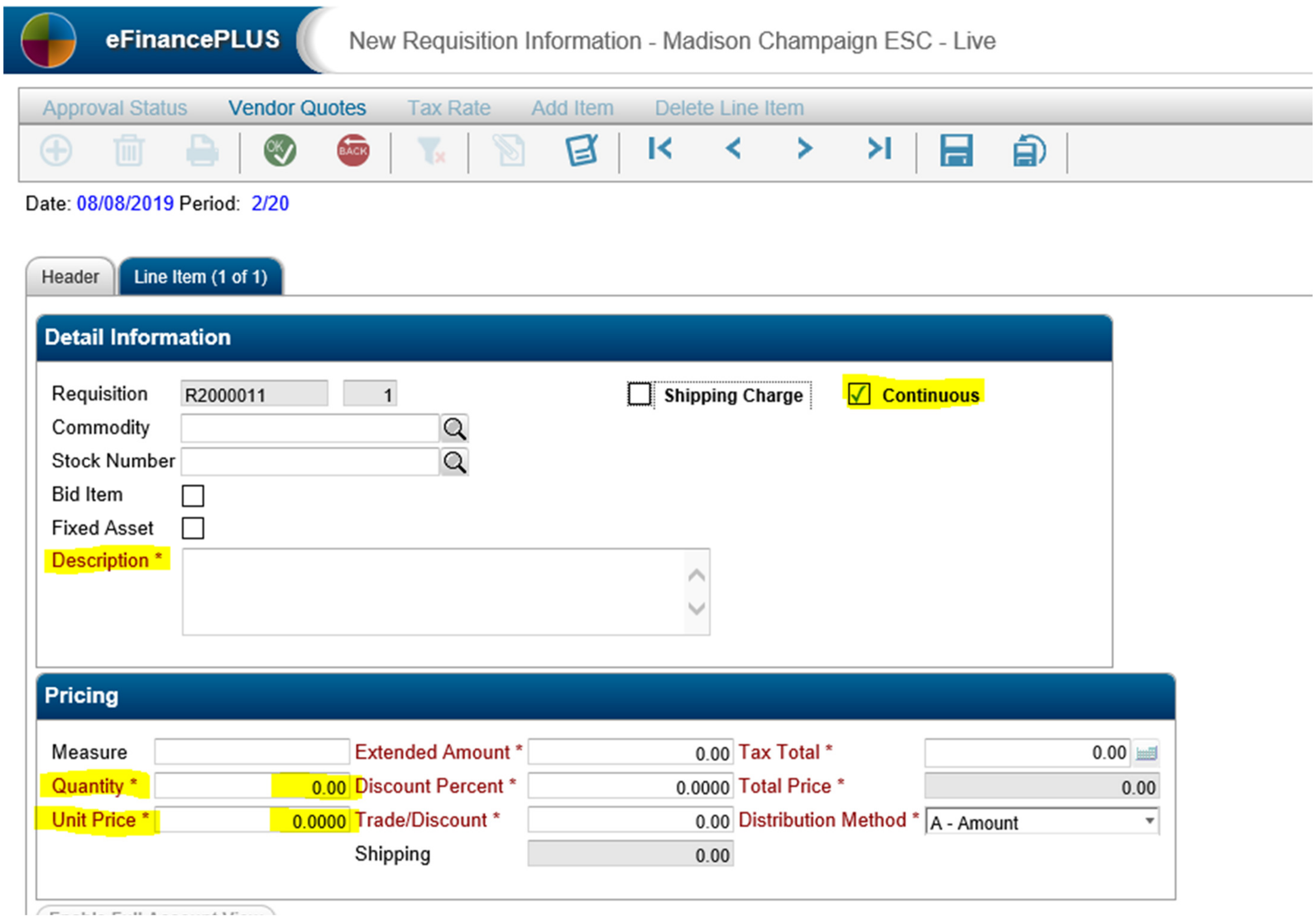
New Requisition - Adding Items

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



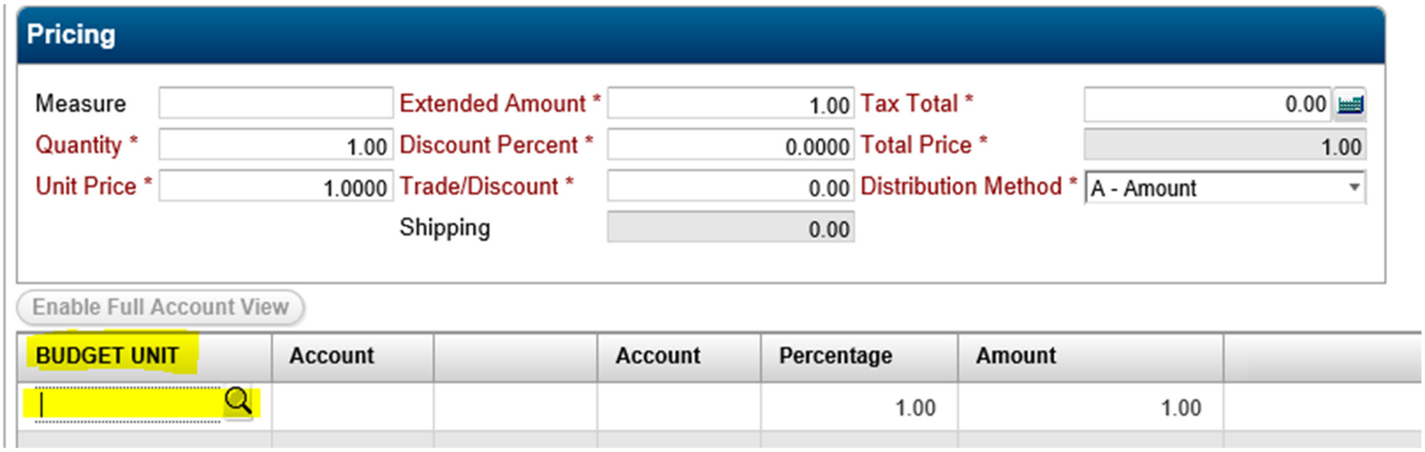
New Requisition - Description, Pricing, Continuous

***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



New Requisition - Budget Unit

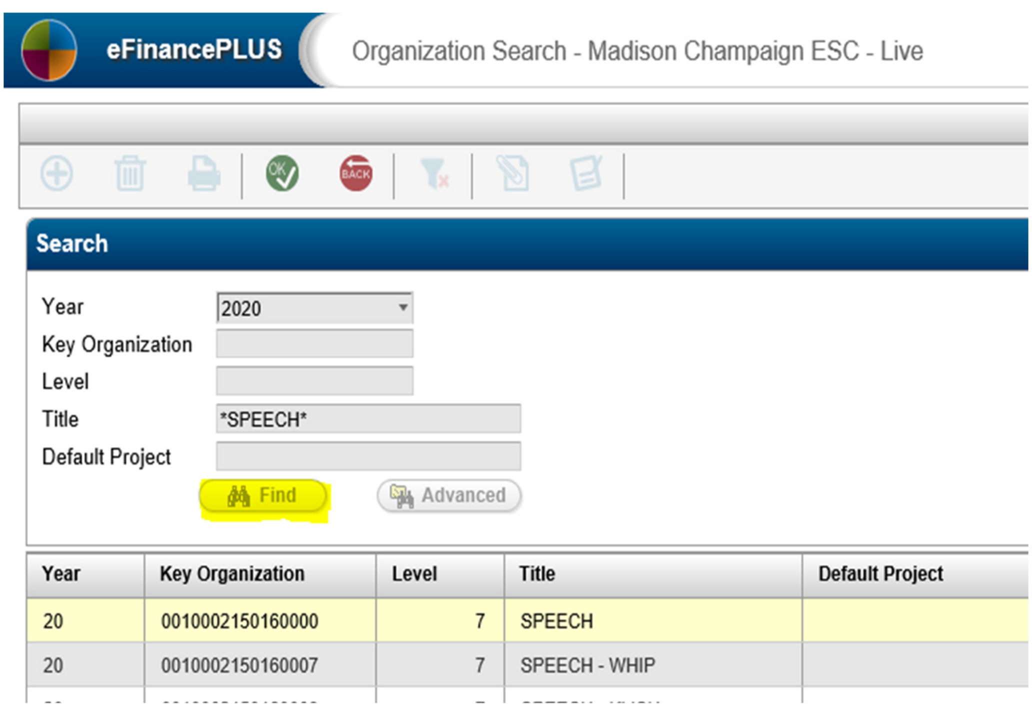
Enter the Budget Unit. If you do not know the Budget Unit, click the magnifying glass to search (see below).



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

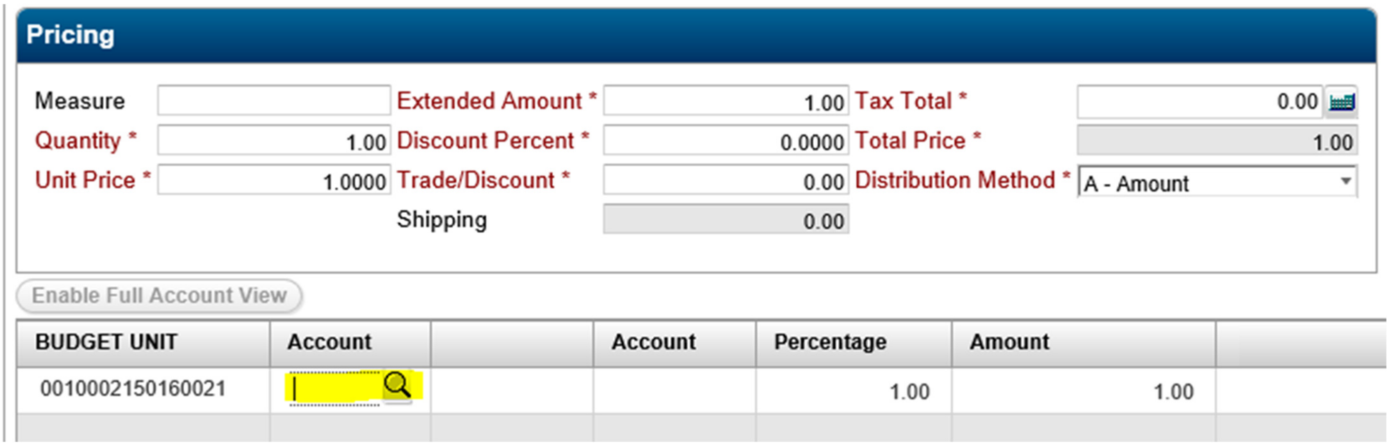
Budget Units are a string of number assigned to each individual or program.

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"



New Requisition - Account

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



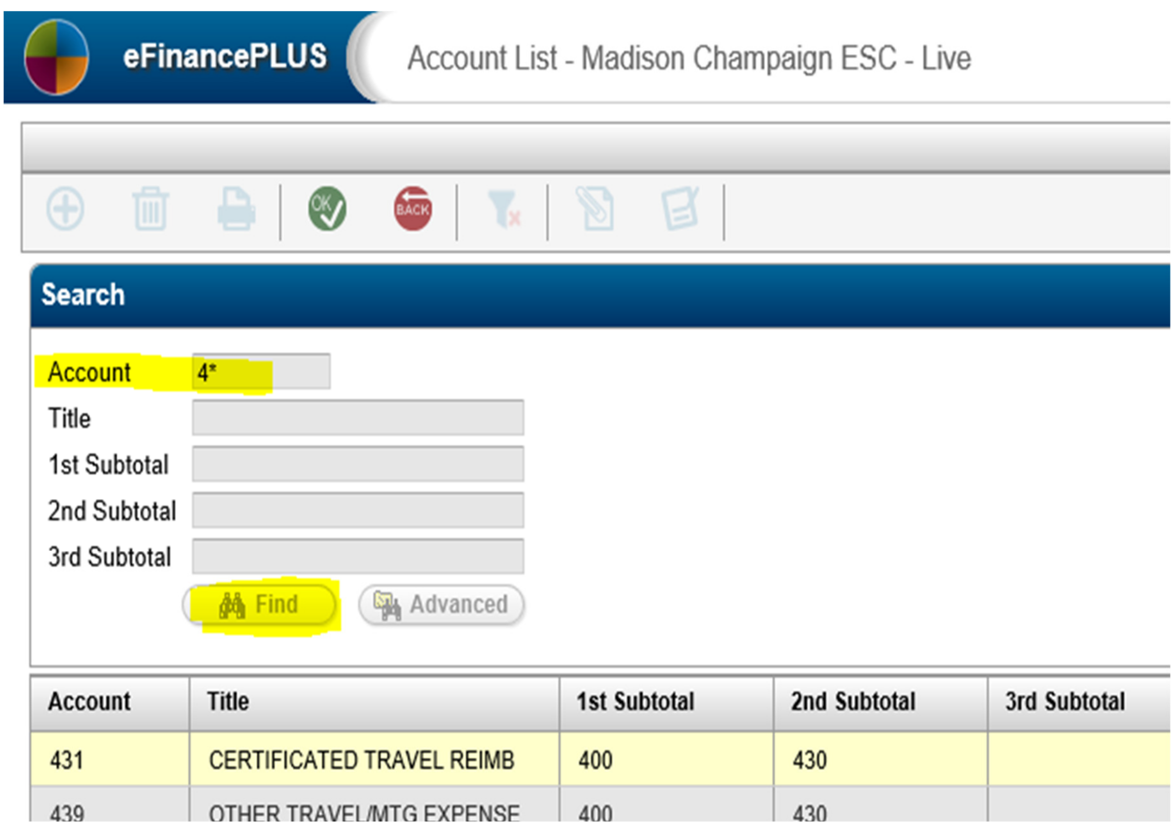
New Requisition - Account Search

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*

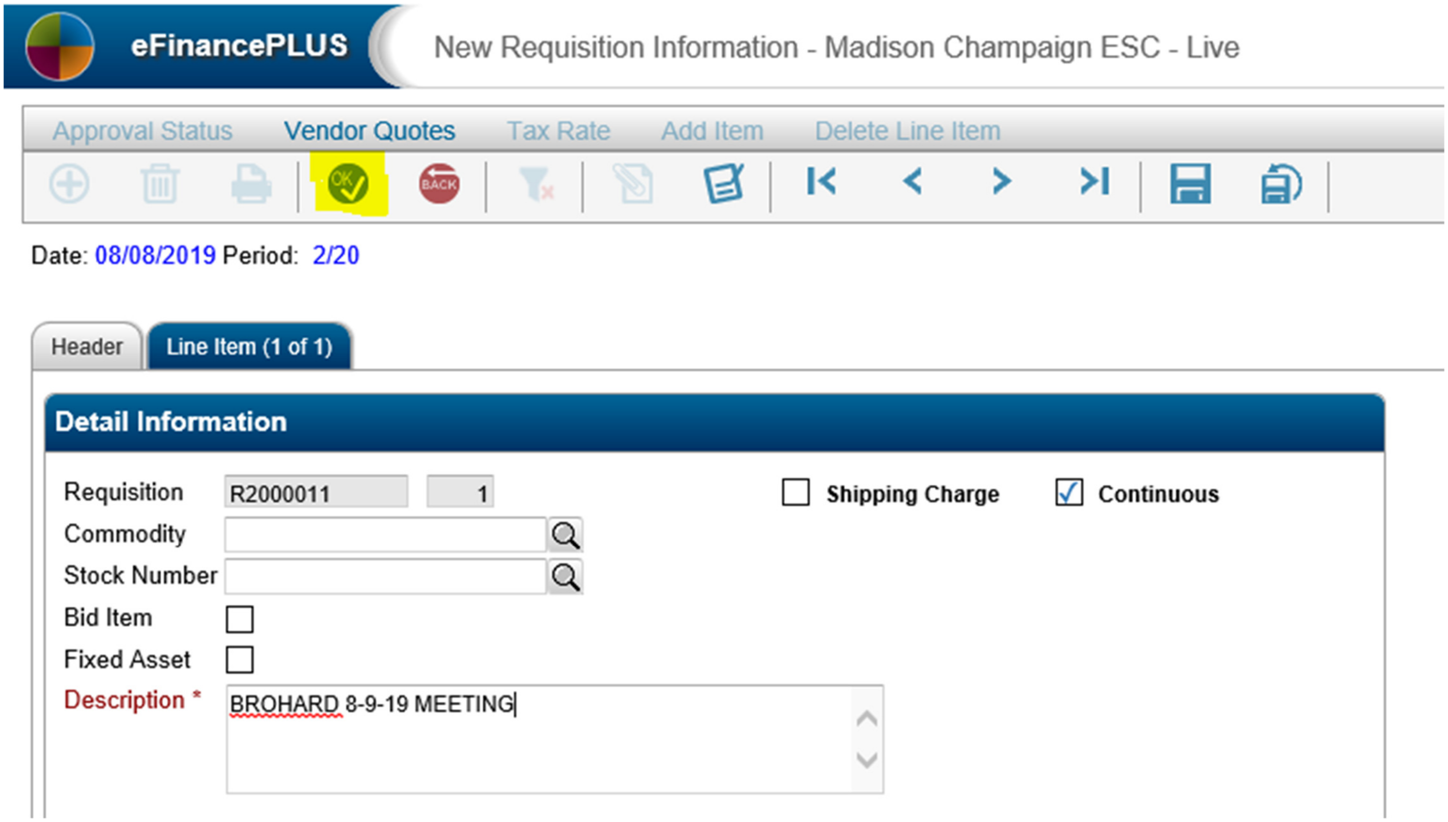
Our most commonly used accounts are: **431** - Travel
439 - Professional Development
510/511/512 - Supplies

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



New Requisition - Finishing the Item

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



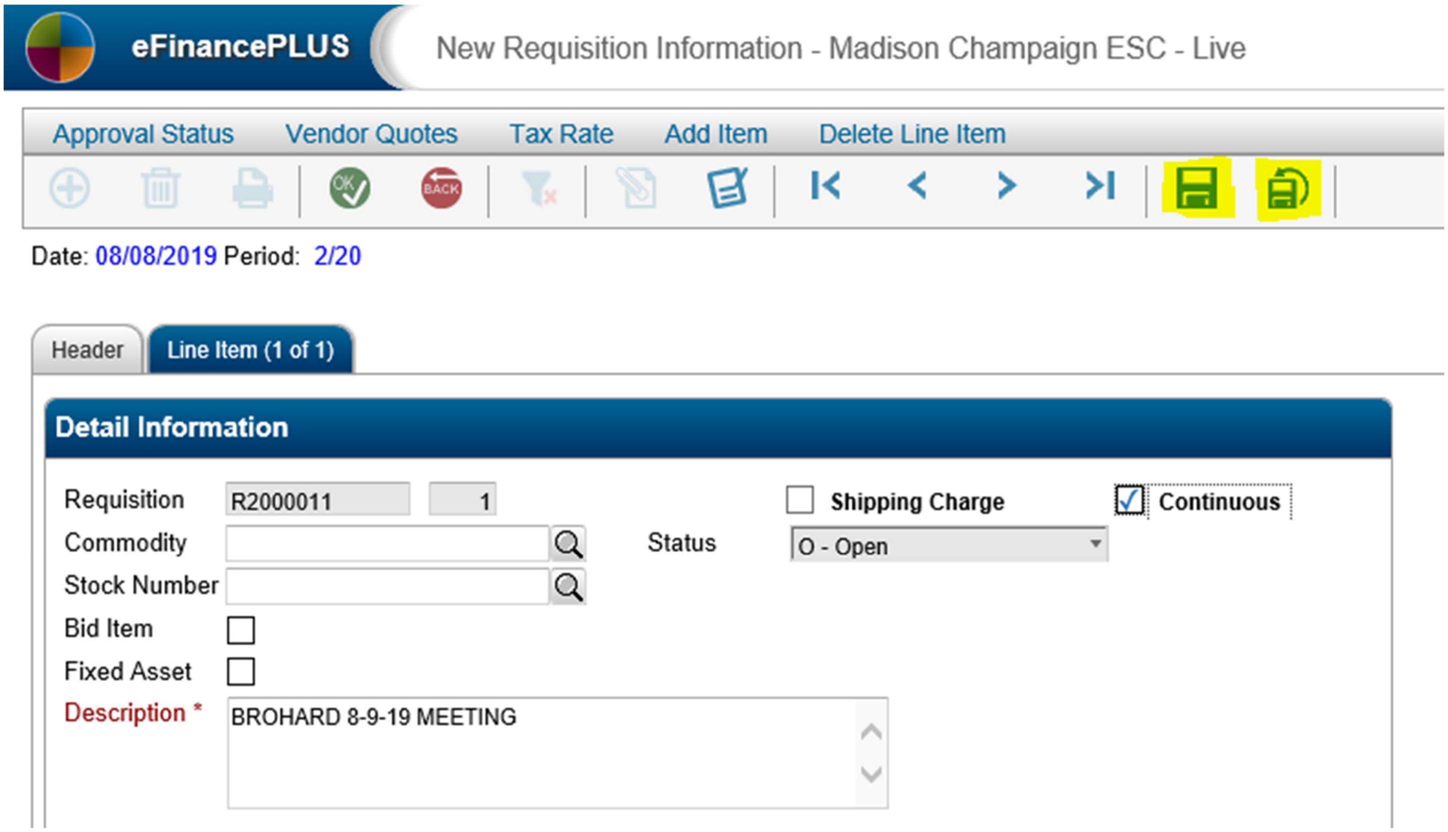
***Note - To add additional items, click Add Item and repeat the step for entering at item. Click "OK" when finished to save.**

- **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.



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