



Login URL

Training Link: <https://stlouisparktrain.efp.sourcewelltech.org/finance>

Live Link: <https://stlouispark.efp.sourcewelltech.org/finance>

Single Sign On (SSO) – Once you click the link, it will prompt you to select your district email address and automatically log you in.

New Chart of Account Structure

FUND	ORG	PRG	CRS	FIN	OBJ	
XX	XXX	XXX	XXX	XXX	XXX	
FUND	ORG	PRG	FIN	CRS		NEW "OBJECT"
XX	XXX	XXX	XXX	XXX		XXX

Examples:

Budget Code	Budget Code Title	Account	Account Code Title
01101203000000	AQUILA ELEMENTARY	430	INSTRUCTIONAL SUPPLIES
02005770701000	FOOD SERVICE LUNCH	490	FOOD
04500505321000	COMMUNITY ED GENERAL	401	GENERAL SUPPLIES

Creating a Requisition

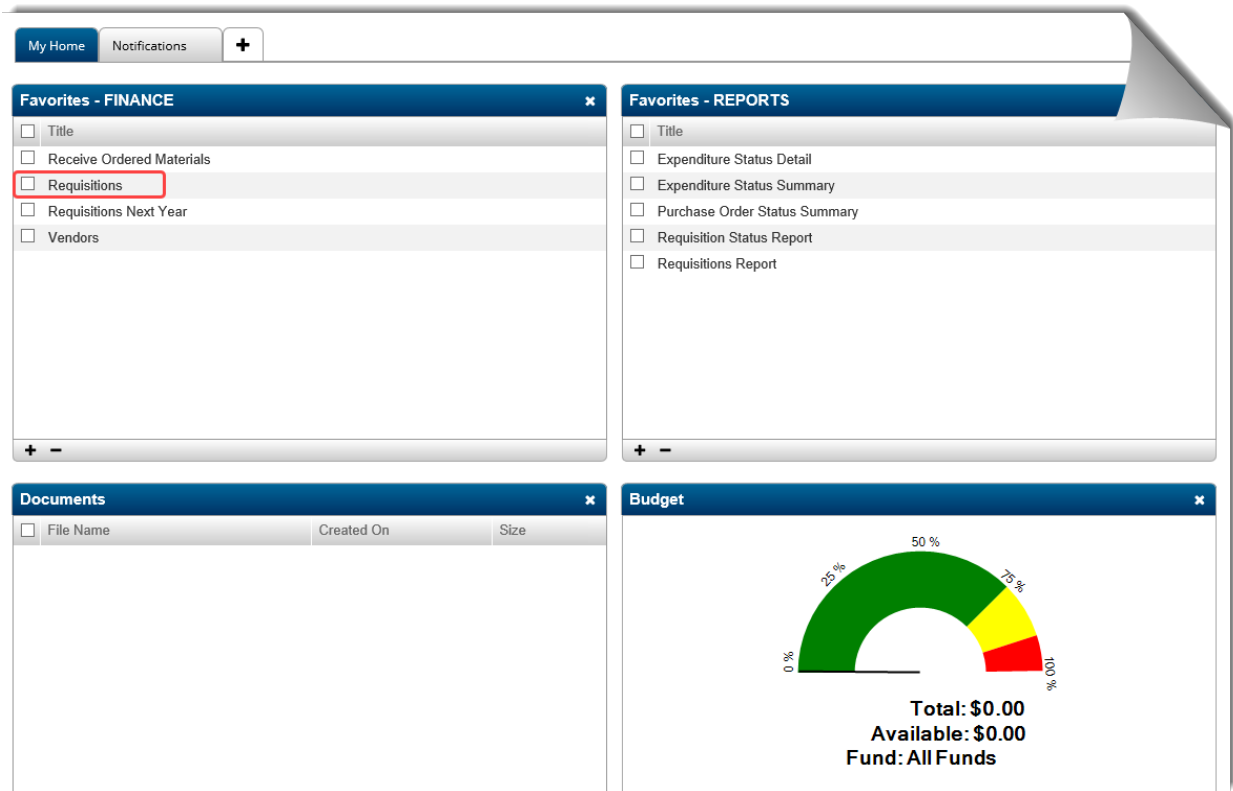
A requisition is comprised of two sections, header and line item(s). Each section contains several fields. Some are required (field name in red), while others are not.

The system functions effectively when tabbing from field to field when in data entry mode.

To create a requisition:

- Select **Requisitions** from Home Page or
- Follow menu path: Main Menu > Purchasing > Entry & Processing > Requisition Processing > Requisitions

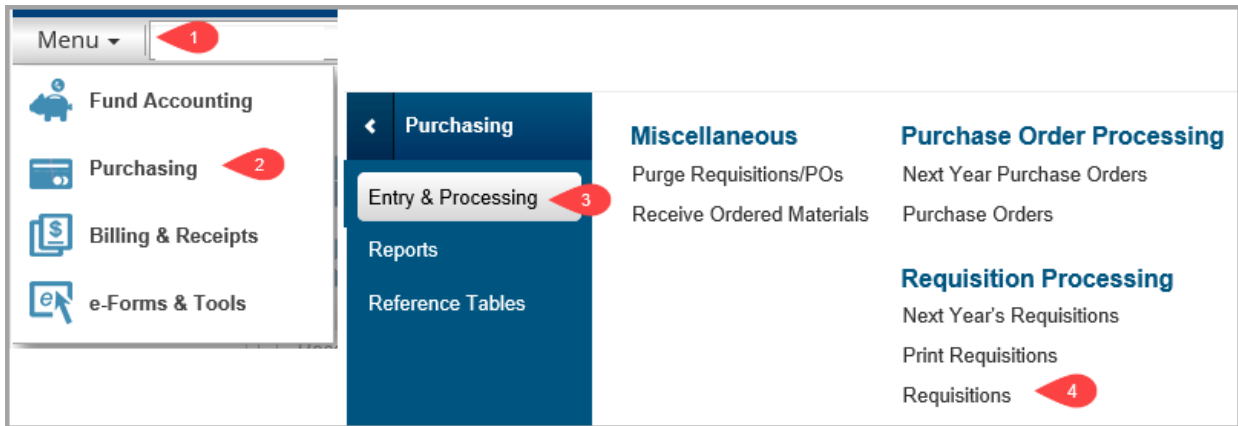
Home Page:



The screenshot displays the Home Page interface with the following components:

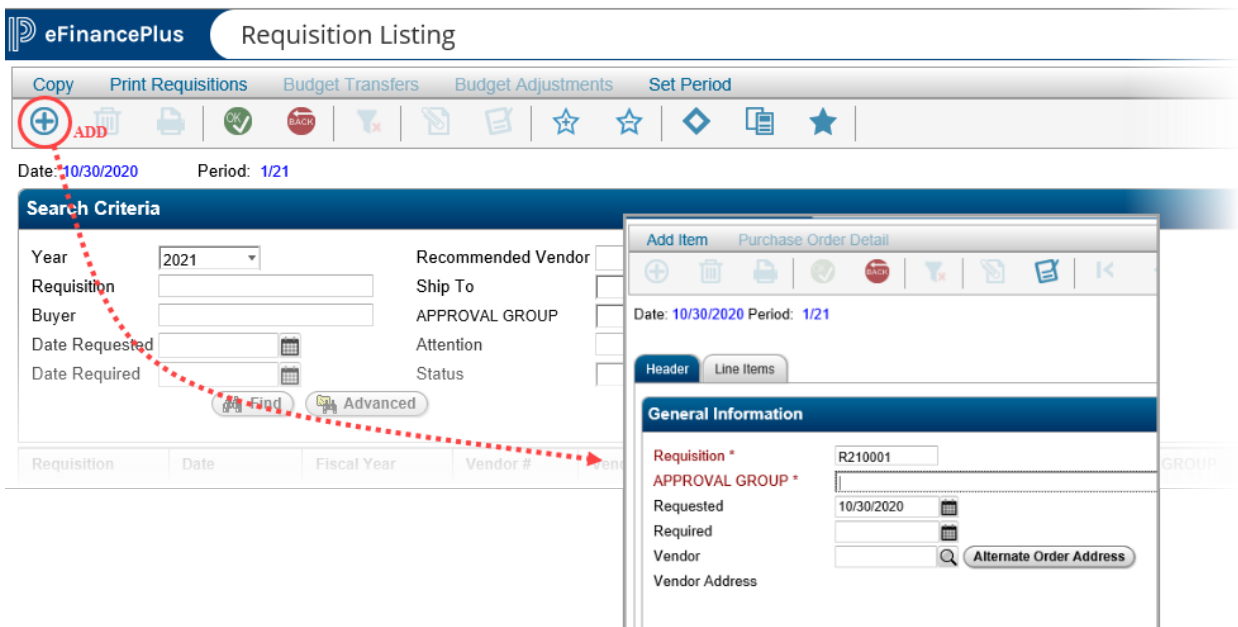
- Top Navigation:** "My Home" button, "Notifications" button, and a "+" icon.
- Favorites - FINANCE:** A list of links with checkboxes:
 - ☐ Title
 - ☐ Receive Ordered Materials
 - ☒ **Requisitions** (highlighted with a red box)
 - ☐ Requisitions Next Year
 - ☐ Vendors
- Favorites - REPORTS:** A list of links with checkboxes:
 - ☐ Title
 - ☐ Expenditure Status Detail
 - ☐ Expenditure Status Summary
 - ☐ Purchase Order Status Summary
 - ☐ Requisition Status Report
 - ☐ Requisitions Report
- Documents:** A table with columns: "File Name", "Created On", and "Size".
- Budget:** A gauge chart showing budget status. The gauge is a semi-circle divided into segments: 0% (green), 25% (green), 50% (green), 75% (yellow), and 100% (red). Below the gauge, the text reads:
 - Total: \$0.00
 - Available: \$0.00
 - Fund: All Funds

Menu Path:



Standard Requisition

Click **Add New** to auto-generate the next available requisition number.





Header

- Requisition: Number auto assigned
- Approval Group: Required – Choose from dropdown
- Requested: Date requisition generated
- Required: If product required by specific date can enter here
- Vendor: Should be entered if known, not required
- Vendor Address: Populates after vendor code entered
- Add Attachment: Check if you would like to add attachment
- Freight: Not Used
- Comments: First 25 characters will appear in description field on PO
- Buyer: Person creating requisition
- Attention: Person receiving product
- Ship To: Required – Choose from dropdown

General Information

Requisition * R230001

APPROVAL GROUP * [dropdown]

Requested 04/22/2022 [calendar icon]

Required [calendar icon]

Vendor [search icon] Alternate Order Address

Vendor Address [dropdown]

Add Attachment? ☐ Continuous ☒

Freight [text box]

Comments [text box]

Buyer [text box]

Attention [text box]

Ship To * [dropdown]

Vendor Address Dropdown:

- AQ-101 - AQUILA OFFICE
- CONSTRUCTION - CONSTRUCTION
- ESMSPI - ESCHOOLMALL PRE-ENCUMBRANCE
- FACILITIES - FACILITIES
- HS ATHLETICS - HS ATHLETICS
- HS-303 - HIGH SCHOOL OFFICE
- MS-302 - MIDDLE SCHOOL OFFICE
- PH-106 - PETER HOBART OFFICE
- PSI-108 - PARK SPANISH OFFICE
- SL-107 - SUSAN LINDGREN OFFICE
- SN - SCHOOL NUTRITION
- SPEED - SPECIAL ED

Ship To Dropdown:

- AQ-101 - AQUILA ELEM
- CCC-301 - CENTRAL COMMUNITY CENTER
- DO - INDEPENDENT SCHOOL DISTRICT #283
- ESMSPI -
- HS-303 - ST LOUIS PARK HIGH SCHOOL
- MS-302 - ST LOUIS PARK MIDDLE SCHOOL
- PH-106 - PETER HOBART ELEM
- PSI-108 - PARK SPANISH IMMERSION
- SL-107 - SUSAN LINDGREN ELEMENTARY

Vendor

- If Known: Enter code and tab to next field
- If Unknown: Select **Looking Glass** to initiate search

- Type a portion of the name, using * where appropriate, click 'OK'. The asterisk is a wild card.
 - Example of search results:
 - *OFFI*- Vendors with OFFI anywhere in the name



- *OFFI - Vendors in which name ends with HEW
- OFFI* - Vendors in which name starts with HEW

eFinancePlus Vendor Search

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
10420	GENERAL OFFICE PRODUCTS CO	4521 HIGHWAY SEVEN	MINNEAPOLIS	MN	55416
12079	RIVERVIEW LAW OFFICE, PLLC	225 NORTH BENTON DRIVE, S	SAUK RAPIDS	MN	56379-0570
4146	INNOVATIVE OFFICE SOLUTIONS	151 E CLIFF ROAD	BURNSVILLE	MN	55337
P1080	OFFICE DEPOT	PO BOX 88040	CHICAGO	IL	60680

- To select vendor to be used
 - Highlight the vendor and click **OK** or
 - Double click on vendor
- If no results, contact business office to request the vendor to be added and provide:
 - Name
 - Address
 - Contact Info
- Business Office will notify you of vendor code



Attachment

If attachment needs to be added, click on **Add Attachment** box. After saving the requisition, the Attachment screen will be displayed.

Once header fields are complete continue tabbing to get to Line Item tab or you may click on the Line Item tab.

Line Item

Detail Information

- Commodity: Not Used
- Stock Number: Not Used
- Bid Item: Not Used
- Fixed Asset: Not Used
- Description: Required, max 250 characters

Pricing Information

- Measure: Note required
- Quantity: Required
- Unit Price: Required
- Extended Price: Auto-populates
- Discount/Percent: .25 = 25%
- Trade/Discount: Must be negative amount
- Shipping: Accessible when Shipping Charge box checked
- Tax Total: Not Used
- Total Price: Auto calcs
- Distribution Method: Used if charging to multiple codes



Header Line Item (1 of 1)

Detail Information

Requisition R210001 1 ☐ Shipping Charge ☒ Continuous
Commodity
Stock Number
Bid Item ☐
Fixed Asset ☐
Description * 123456 - 8 /12 X 11 WHITE COPY PAPER No field for item # - enter as first part description

Pricing

Measure CS Extended Amount * 60.00 Tax Total * 0.00
Quantity * 2.00 Discount Percent * 0.0000 Total Price * 60.00
Unit Price * 30.0000 Trade/Discount * 0.00 Distribution Method * A - Amount
Shipping 0.00

Enable Full Account View

BUDGET CODE	Account	Account	Percentage	Amount
01005110000000	401	Not used	1.00	60.00
			0.00	0.00

Total Charges 60.00
BUSINESS SERVICES GENERAL SUPPLIES Total Requisition 60.00

- Budget Code: Required, use looking glass to initiate search
- Account: Required, use looking glass to initiate search
- <ENTER> to accept entry

Shipping Charge

To add an estimated shipping line to the requisition, check the **Shipping Charge** box. The system assigns this as line number 99. If you are not sure if the vendor will be charging a shipping fee, add a shipping charge line with the amount being \$0.01

- Description auto populates
- Enter a shipping amount
- Make any necessary changed to budget codes

Notes

A Note is additional information you would like to include on the requisition and purchase order. They print before the first detail line on a purchase order.

- Click on **Note**
- Tab to section where you can beging typing
- Click **OK** to save



Add Item

Add a NOTE

Req No R210001 PO No Change No

From the Req No <TAB> to begin typing here.....

To Save

When complete with adding the detail line items for the Requisition, click on the **Save** icon. If you should need to come back to finish, 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

If **Attachment** box was checked, Attachment screen will display. Click on **Browse** to search for the location of the attachment.

eFinancePlus Attachments

Attachment Information

Requisition Number R210010

Add Attachment

Attachment Group * REQUISITION

File Name * Browse... 1

Title * Give the attachment a title 2

Attachment Group	Title
REQUISITION	Quote



Reviewing a Requisition

PURCHASING > ENTRY & PROCESSING > REQUISITION PROCESSING > REQUISITIONS

Requisition Listing

[Print Requisitions](#)
[Set Period](#)
[Budget Transfers](#)
[Budget Adjustments](#)
[Purchase Order Detail](#)

Date: 11/03/2020
Period: 1/21

Search Criteria

Year

Requisition

Buyer

Date Requested

Date Required

Recommended Vendor

Ship To

APPROVAL GROUP

Attention

Status

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	APPROVAL GROUP	Amount	Status	In...
R210060	11/02/2020	2021	20001	HIGHWAY 55 RENTAL		SWT	1.99		
R210061	11/03/2020	2021	20001	HIGHWAY 55 RENTAL	C WEMPLE	SWT	50.00		



Requisition Detail:

eFinancePlus Requisition Information - R210061 CHAR S

Add Item **Purchase Order Detail**

Date: 11/03/2020 Period: 1/21

Header **Line Item (1 of 1)**

General Information

Requisition * R210061 ☐ Continuous
APPROVAL GROUP * SWT - SWT TESTING
Requested 11/03/2020
Required
Vendor 20001
Vendor Address HIGHWAY 55 RENTAL
123 PINE DR
MERRYVILLE MN 55555

Freight
Comments
Buyer C WEMPLE
Attention C WEMPLE
Ship To * DO - DISTRICT OFFICE
2340 Energy Park Drive
St Paul MN 55101

Item	Description	Quantity	Price	Total	BUDGET CODE	Account	Status
1	RENTAL OF EQUIPMENT	2.00	25.0000	50.00	01005010000000	401	Open

- A. Attachment
- B. Note
- C. Budget/Account Code
- D. Status
- Open
 - Approved
 - Partial
 - Needs Correction
 - Denied
 - Purchase Order Number



View Status

- Select requisition line
- Select **Approval Status**

Vendor Quotes **Approval Status** Tax Rate Purchase Order Detail

Date: 11/03/2020 Period: 1/21

Header Line Item (1 of 1)

Req Number Line No

Level/Code	Approver	Action Date	Action	Required	Comments	
1	wemple	11/02/2020	A - Approved	Y - Yes		

Approval History

Date	Time	Level/Code	Approver	Action Date	Action	Required	Comments
11/02/2020	09:58:13	1	wemple	11/02/2020	A - Approved	Y - Yes	
11/02/2020	09:57:29	1			O - No Action	Y - Yes	REQUISITION ADDED - ROUTED FOR APP