

# 5.2 eFinance Guide

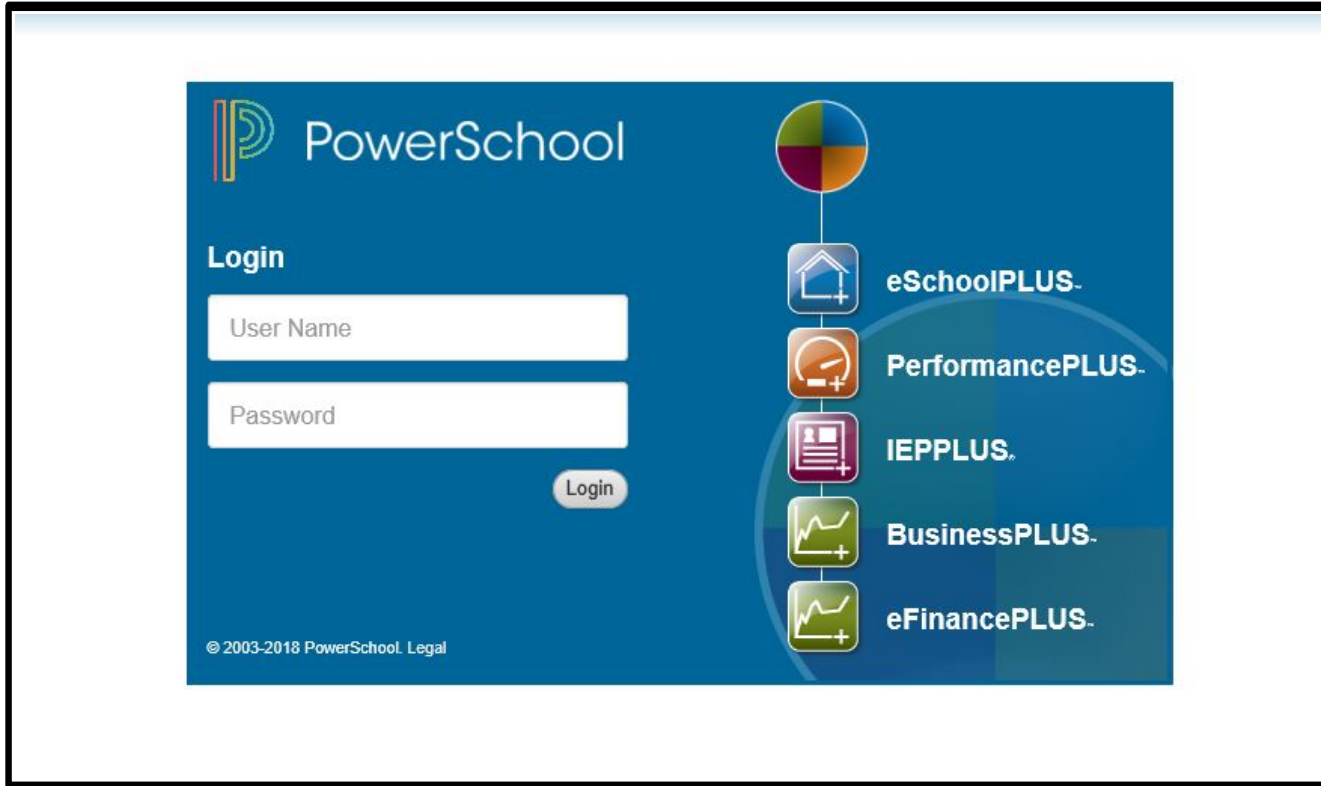
Lansing School District

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1.

Login Screen



# 1. Interface/ Home Screen

1. Access your favorites from any screen.

2. Use Voice – voice your opinion on any changes you think could improve eFinance.

3. Logout

My Home 2 +

**Favorites - Favorites**

- Title
- Balance Sheet
- Batch Budget Transfer
- Batch Journal Entries
- Close Purchase Order
- Expenditure Budgets
- Mass Convert Requisitions to Purchase Orders
- Purchase Order Approval
- Purchase Order Listing
- Requisition Approval
- Requisition Listing
- Revenue Budgets

**Budget**

**Total: \$144,494,241.18**  
**Available: \$132,277,933.57**  
**Fund: All Funds**

Last Updated: 12-31-1969 7:00 pm

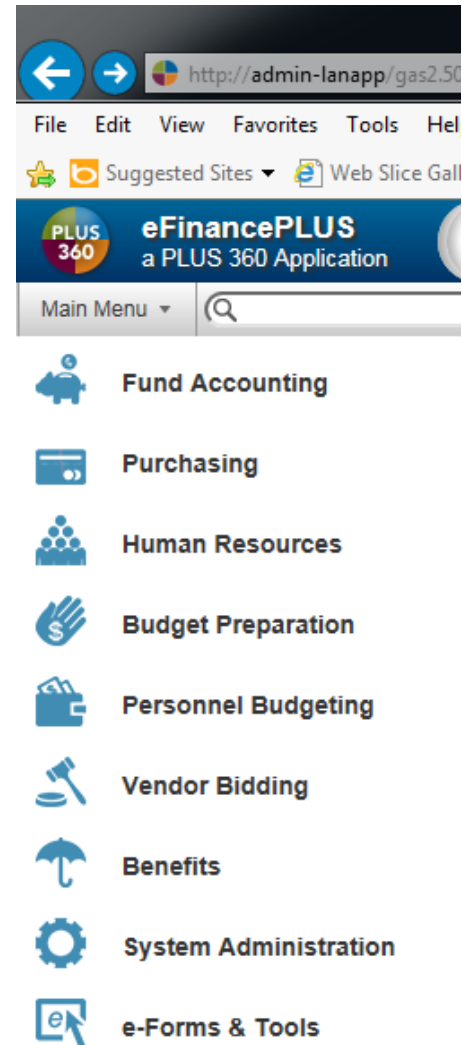
**Documents**

File Name	Created On	Size
<input type="checkbox"/> expstatd_29241.pdf	2018-07-12 09:41	74 KB
<input type="checkbox"/> expautdt_27869.pdf	2018-07-12 09:34	707 KB
<input type="checkbox"/> expstat_22886.pdf	2018-07-12 09:09	22 KB
<input type="checkbox"/> postbudappr_19787.pdf	2018-07-12 08:53	11 KB
<input type="checkbox"/> postbudappr_11816.pdf	2018-07-12 08:12	11 KB
<input type="checkbox"/> masspost_25815.pdf	2018-07-11 17:22	10 KB
<input type="checkbox"/> masspo2_1202.pdf	2018-07-11 17:22	10 KB
<input type="checkbox"/> ExpenditureLedger_31338.xls	2018-07-11 17:09	221 KB
<input type="checkbox"/> postbudappr_29587.pdf	2018-07-11 17:00	11 KB
<input type="checkbox"/> postbudappr_27151.pdf	2018-07-11 16:47	11 KB
<input type="checkbox"/> deldistp3313_10100.xls	2018-07-11 12:33	470 KB

**Purchase Order Aging**

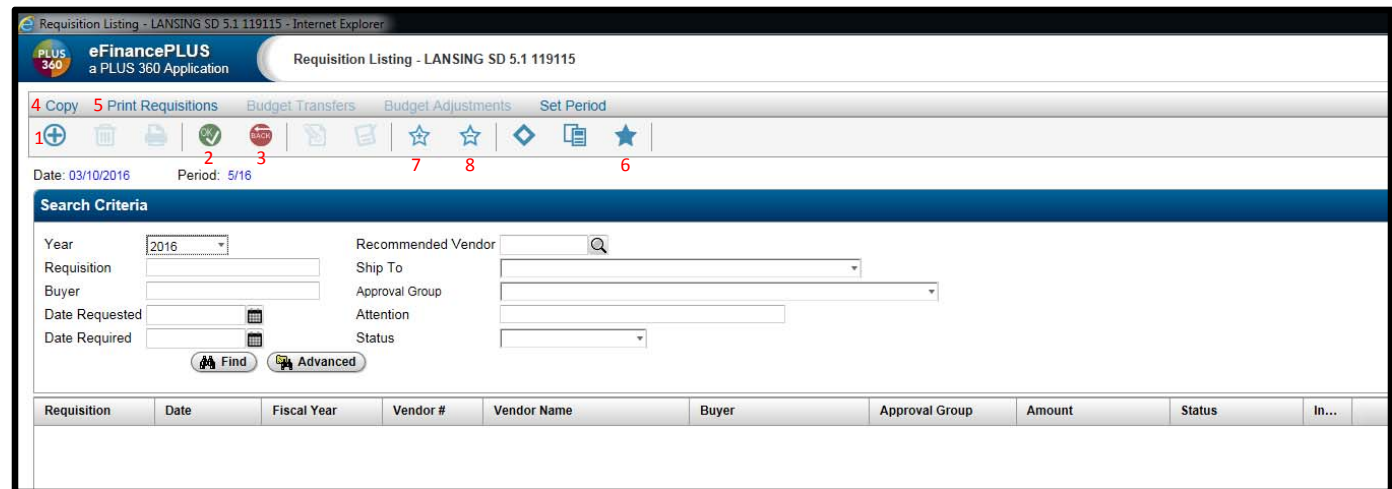
# 1. Main Menu – Closer Look

- The main menu is now organized by alphabetical Order within each major category.
- To the right is a picture with a closer look at the new menu icons and what they mean.



# 1. Requisition Screen

1. New Requisition
2. OK Button
3. Back Button
4. Copy Requisition
5. Print Requisitions
6. Favorites Listing
7. Add Favorite
8. Delete Favorite



# 1. Graphic Changes

## New Requisition

1. OK Button
2. Back Button
3. Save
4. Add Item
5. First Item
6. Previous Item
7. Next Item
8. Last Item
9. Save in Progress

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application New Requisition Information - LANSING SD 5.1 119115

4 Add Item

Date: 03/10/2016 Period: 5/16

Header Line Items

**General Information**

Requisition \* 1602823 Add Attachment?   Continuous

Approval Group \* Freight

Requested 03/10/2016 Comments

Vendor   Buyer

Vendor Address Attention

Ship To \*

# 1. PO Approval Screen

1. Attachments
2. Approve
3. Deny
4. Clear
5. Approve All
6. Deny All
7. Needs Correction
8. Approval Status
9. Description
10. Distributions
11. Vendor Quotes
12. Comments
13. New: Notes

Purchase Order Approval - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

Purchase Order Approval - LANSING SD 5.1 119115

Approve 2 Deny 3 Approve All 5 Deny All 6 Needs Correction 7 Clear 4 Approval Status 8 Description 9 Distributions 10 Vendor Quotes 11 Comments 12

Date: 03/11/2016 Period: 5/16

Encumbrance: 16002129  
Approval Group: 022 BI-LING, NGF - NON GRANT FUNDED  
Ship Code: GSRP - HILL CENTER - GSRP  
Description: CULTURAL BROKER

Vendor: 10777777 VENDOR NOT ON FILE  
Issued: 03/11/2016

Status	Line	Description	Quantity	Unit Price	Item Total	ASN	Account	PROJECT...	Account
Open	1	CPNTRACTED SERVICE	1.00	500.0000	500.00	1133100060220000	31900000		



## 2. Account Structure

- Fund:
  - Examples
    - 11 – General Fund
    - 51 – Food Service Fund
    - 71 – Agency Fund
- Grant:
  - 0000 – Non Grant
  - Anything other than four zeros is a grant
  - Examples
    - 1518 – Magnet
    - 1009 – Title I
- Object Code:
  - Examples
    - 3450 – Software/Licenses
    - 4120 - Equipment Repairs/Maintenance
    - 5110 – Teaching Supplies
    - 5210 – Textbooks
    - 5910 – Office Supplies
    - 5990 – Misc. Supplies
    - 6420 – New Equipment
    - 6460 – Replacement Equipment

ASN						ACCOUNT	
11	125	00	08	120	1518	5990	0000
Fund	Function Code	Descriptive	Building	Department	Grant	Object Code	Activity/Course Code

Go to: [http://www.michigan.gov/documents/appendix\\_33974\\_7.pdf](http://www.michigan.gov/documents/appendix_33974_7.pdf) for a guide on the MDE coding requirements.

### 3. How do I set up my favorites?

- **Login to:**

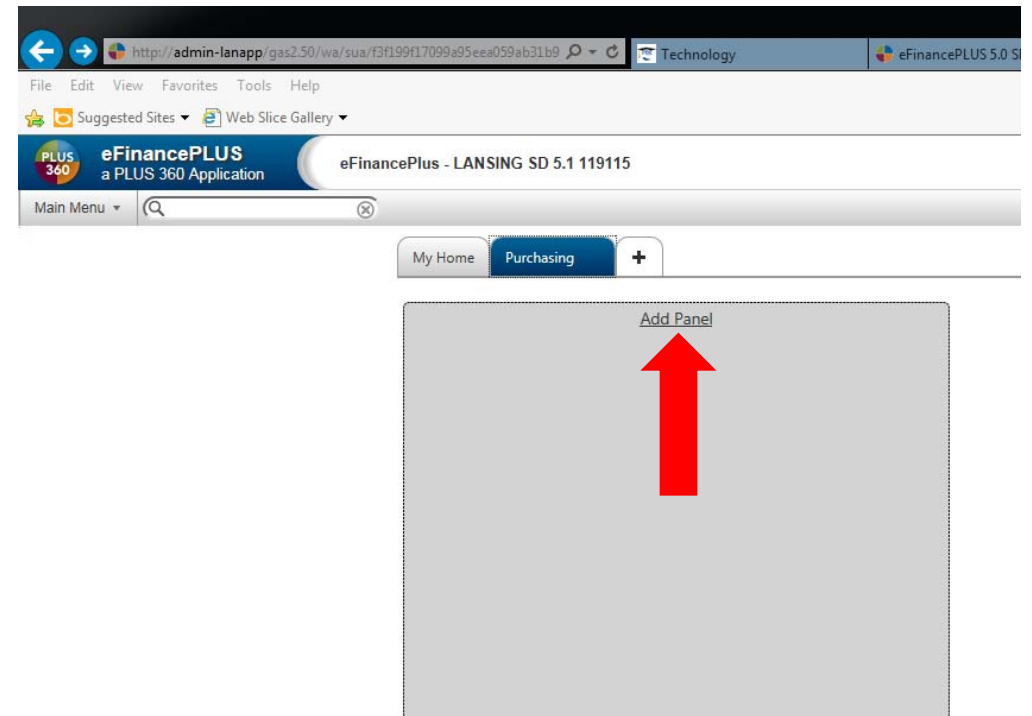
- <https://finapp.lansingschools.net/eFP5.2/eFinancePLUS/SunGard.eFinancePLUS.Web>
- If you are having trouble logging in, please promptly contact the technology department (ext. 2860)



### 3. How do I set up my favorites?

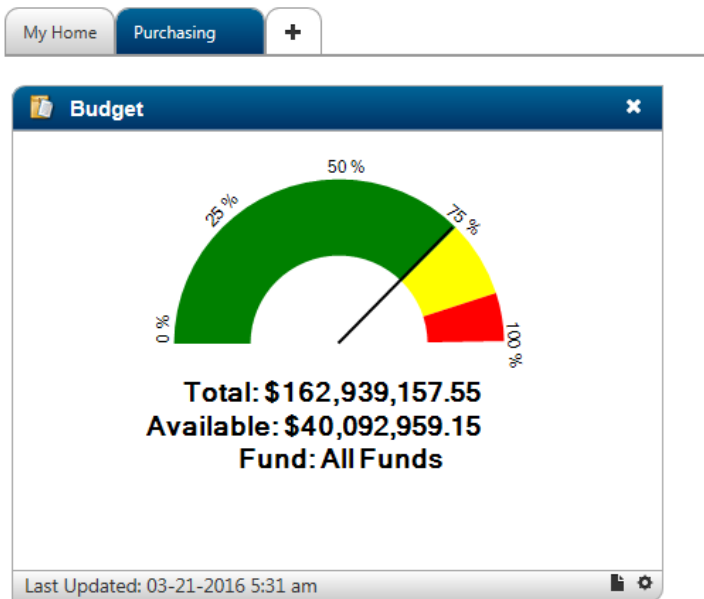
If you have never set up favorites, your screen will be blank.

- Scroll over the screen until you see an “Add Panel” option.
- Click on “Add Panel”



### 3. How do I set up my favorites?

- Use the drop down menu for “Type” and select “KPI Budget vs. Actual” and then click “OK”.
  - This is a very useful panel that can help you to easily print budget reports. See “How do I print a budget report?” for more detail.

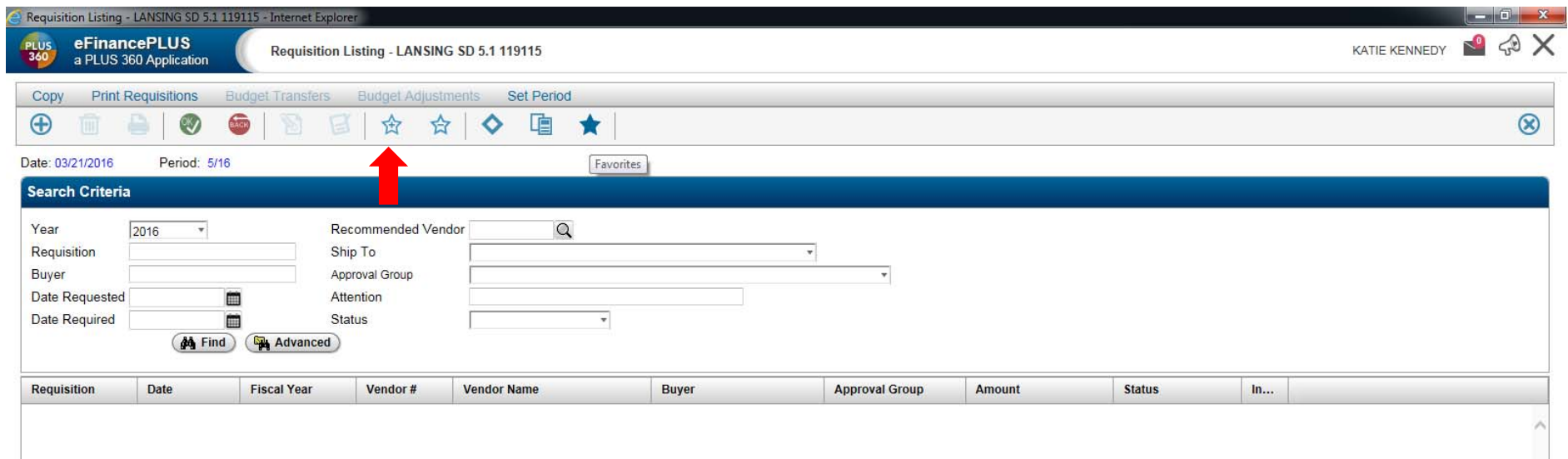


The screenshot shows the eFinancePLUS application interface. The browser address bar displays 'http://admin-lanapp/gas2.50/wa/sua/f3f199f17099a95eea059ab31b9'. The application header includes 'eFinancePLUS a PLUS 360 Application' and 'eFinancePlus - LANSING SD 5.1 119115'. The main navigation bar has 'My Home' and 'Purchasing' tabs. A dialog box titled 'Add Panel' is open, showing the 'Add New Panel' configuration. The 'Type' dropdown menu is set to 'KPI Budget vs Actual', and the 'Width' dropdown menu is set to '1 Panel'. Red arrows point to the 'KPI Budget vs Actual' dropdown and the 'OK' button.

### 3. How do I set up my favorites?

To set up links to other areas of eFinance that you use often, open up the section you would like to add to favorites (such as the requisitions screen).

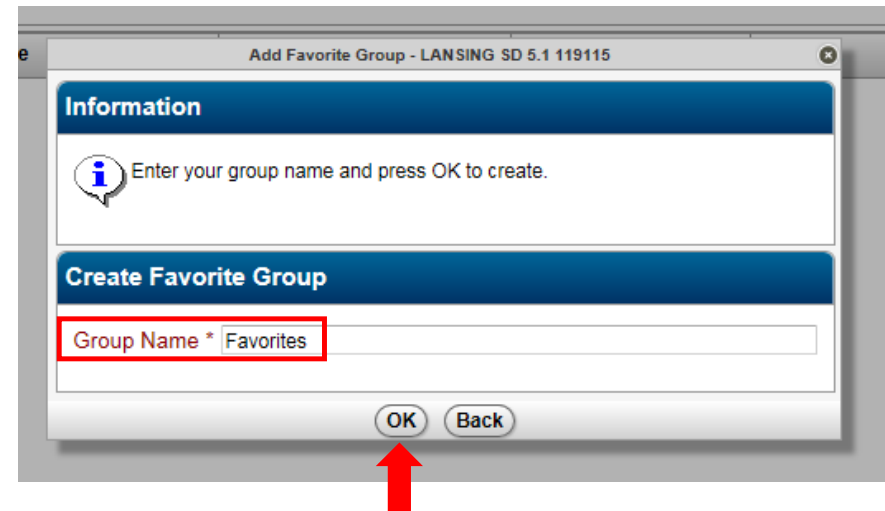
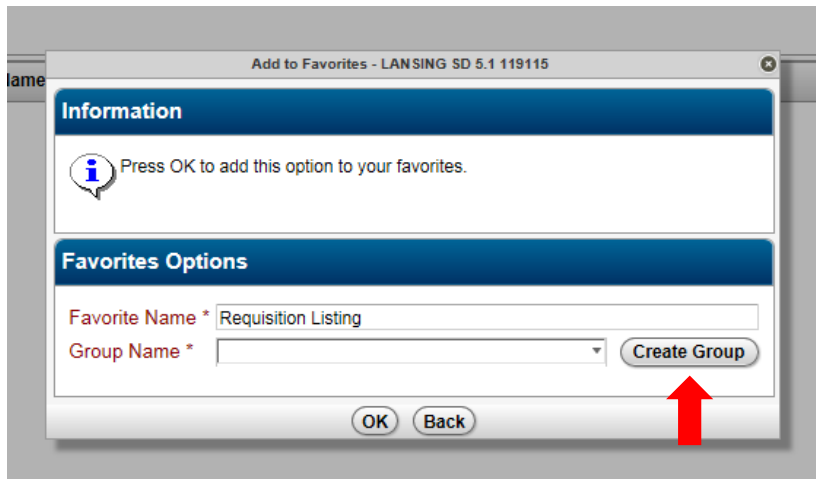
- Click on the star button with a plus to select “Add to Favorites”.



The screenshot shows the eFinancePLUS application interface. At the top, the browser title is "Requisition Listing - LANSING SD 5.1 119115 - Internet Explorer". The application header includes the eFinancePLUS logo and the text "a PLUS 360 Application". The user name "KATIE KENNEDY" is visible in the top right corner. Below the header, there is a navigation bar with buttons for "Copy", "Print Requisitions", "Budget Transfers", "Budget Adjustments", and "Set Period". A toolbar contains various icons, including a star with a plus sign, which is highlighted by a red arrow. Below the toolbar, the "Search Criteria" section is visible, featuring fields for "Year" (set to 2016), "Requisition", "Buyer", "Date Requested", "Date Required", "Recommended Vendor", "Ship To", "Approval Group", "Attention", and "Status". There are "Find" and "Advanced" buttons at the bottom of the search criteria section. Below the search criteria, a table header is visible with columns: "Requisition", "Date", "Fiscal Year", "Vendor #", "Vendor Name", "Buyer", "Approval Group", "Amount", "Status", and "In...".

### 3. How do I set up my favorites?

- Once the Add to Favorites screen pops up, you can leave the “Favorites Name” to the default name already listed.
- Next, use the drop down next to “Group Name” to select the group you wish to add your favorite to.
- If you are new to eFinance, you will need to click “Create Group” to set one up.
- Next, type “Favorites” in the Group Name box to create a new group. Click “OK”.



### 3. How do I set up my favorites?

- You can now use the drop down under “Group Name” to select a group.
- Select the “Favorites” group you just created, and then click “OK”

Add to Favorites - LANSDING SD 5.1 119115

**Information**

*i* Press OK to add this option to your favorites.

**Favorites Options**

Favorite Name \* Requisition Listing

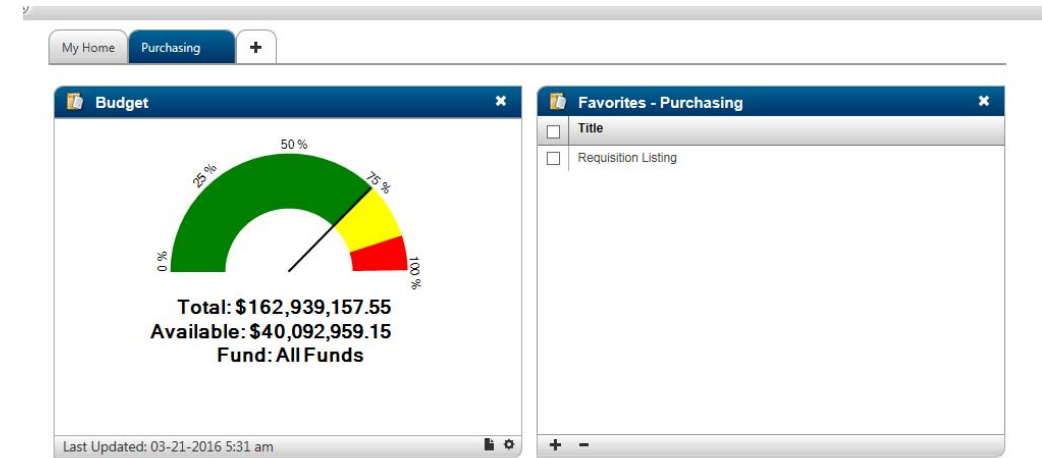
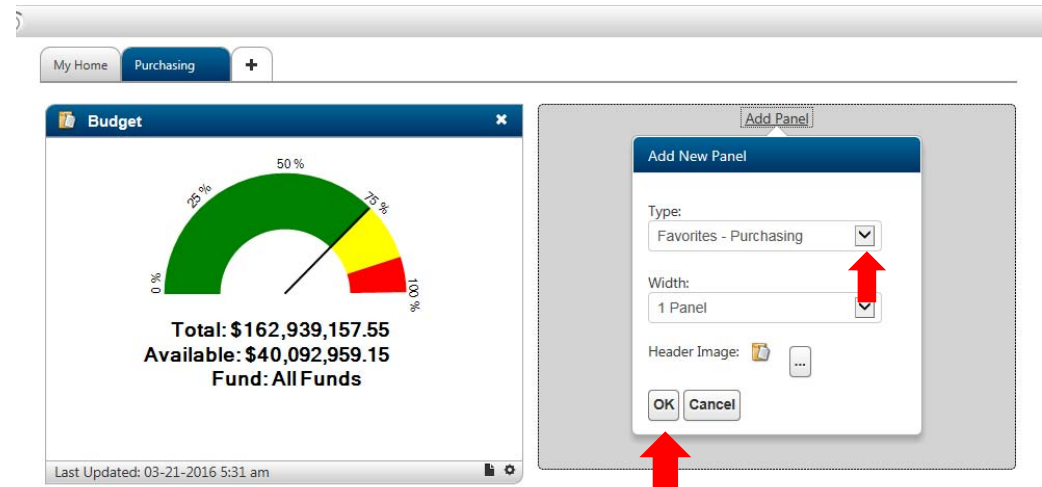
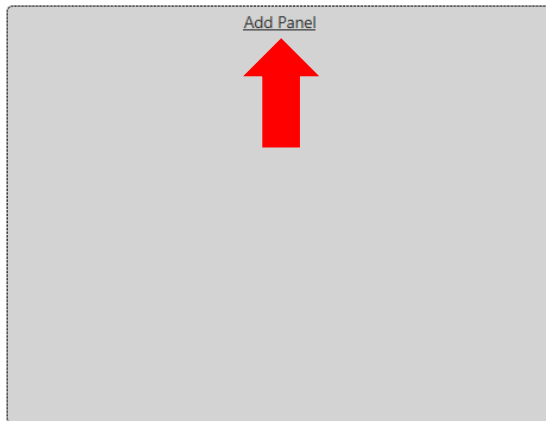
Group Name \* Favorites

Create Group

OK Back

### 3. How do I set up my favorites?

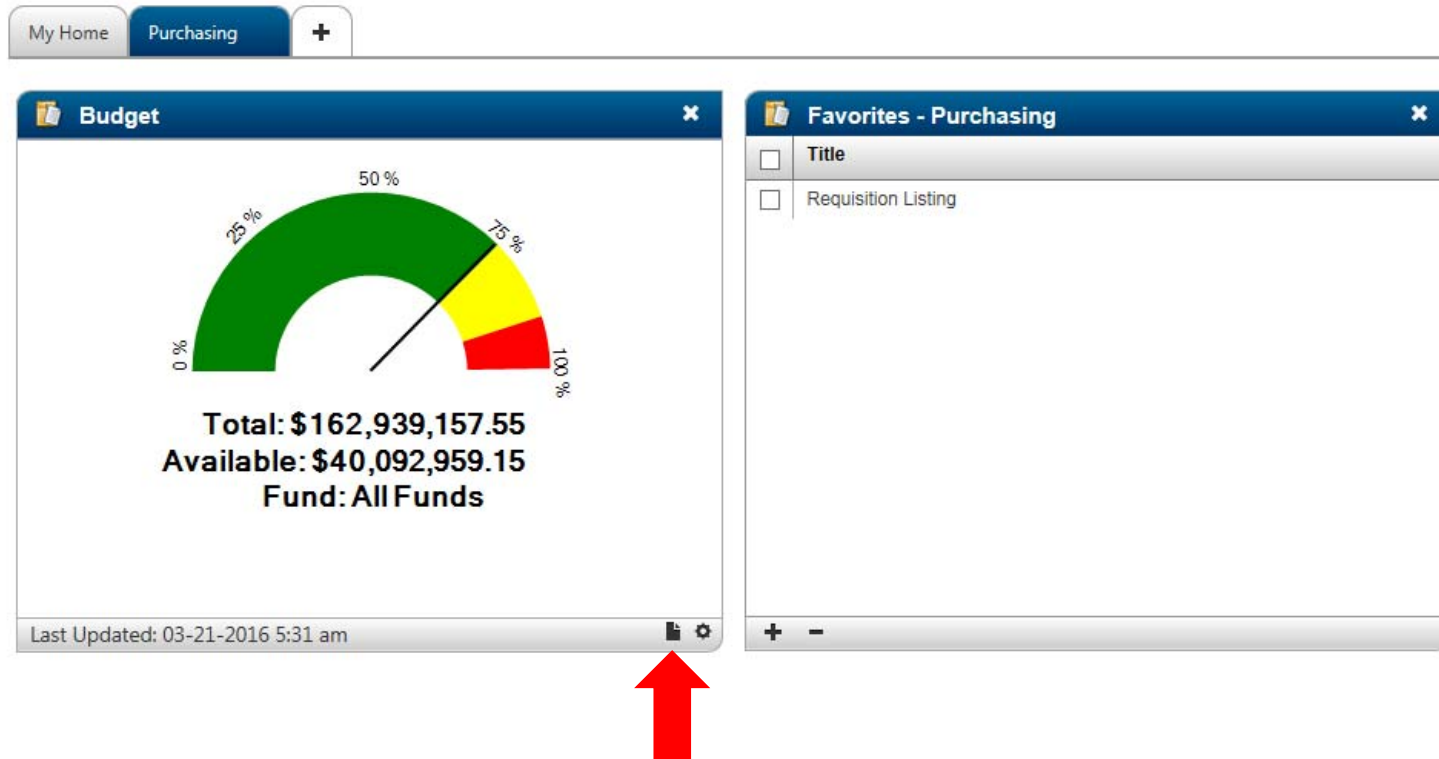
- Back on the home page of eFinance, click “Add Panel” again to add another panel for your favorites.
- In the Type Box, use the drop down to select “Favorites”. Click “OK”.
- Your favorites are now added to your home screen and should look like the picture on the bottom left of this slide.





## 4. How do I print a budget report?

- On the home tab in the budget panel set up in Step 2, click the small page button on the bottom left of the screen.
- When the print screen pops up, click “OK”.



# 4. How do I print a budget report?

- When the report has finished generating, click "Open". Your report will look something like this.

SUNGARD K-12  
 DATE: 03/22/2016  
 TIME: 10:02:33

LANSING SCHOOL DISTRICT  
 DETAIL EXPENDITURE STATUS REPORT

PAGE NUMBER: 1  
 EXPSTALL

SELECTION CRITERIA: fund = '42'  
 ACCOUNTING PERIOD: 5/16

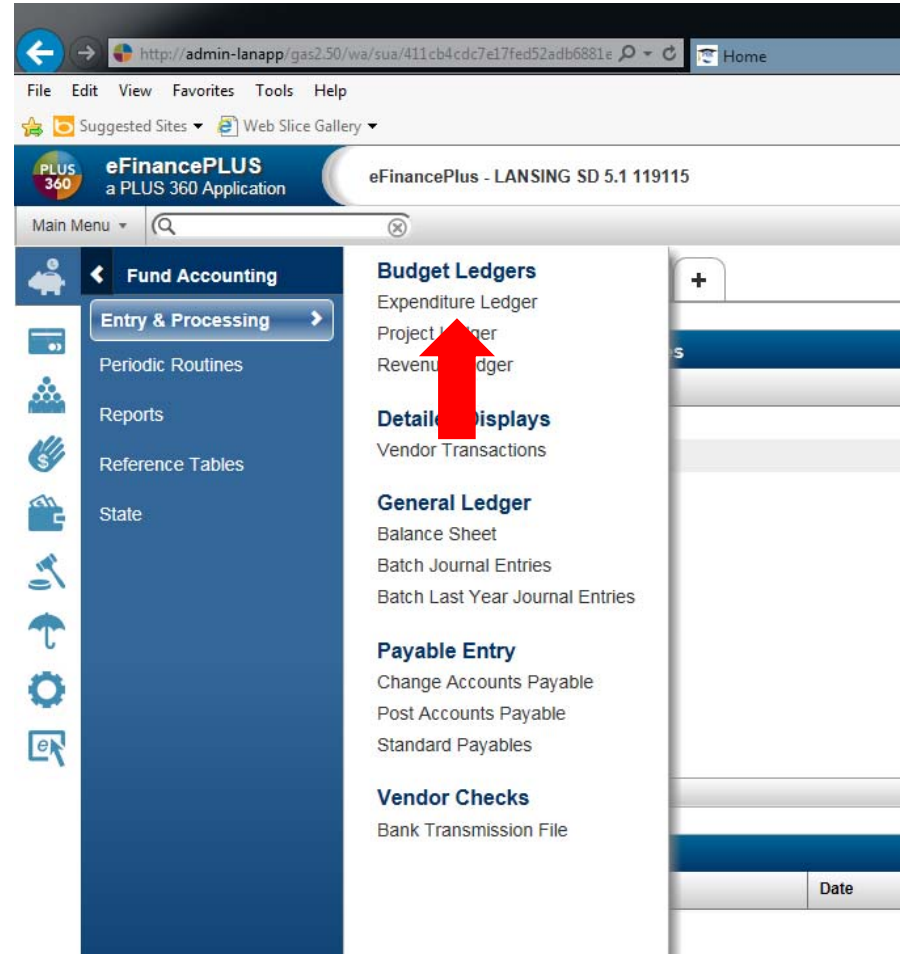
SORTED BY: FUND, GRANT, DEPARTMENT, BUILDING, FUNCTION, 1ST SUBTOTAL, ACCOUNT  
 TOTALED ON: FUND, GRANT, DEPARTMENT, BUILDING, FUNCTION, 1ST SUBTOTAL  
 PAGE BREAKS ON: FUND, GRANT, DEPARTMENT

FUND - 42 - SINKING FUND

ORGANIZATION / ACCOUNT / TITLE	BUDGET	PERIOD EXPENDITURES	ENCUMBRANCES OUTSTANDING	YEAR TO DATE EXP+ENC	AVAILABLE BALANCE
42-453-00-00-000-0000 31900000 SINKING FUND OTHER CO	72,316.00	11,831.00	1,440.00	72,316.00	.00
42-453-01-00-000-0000 31900000 SINKING FUND OTHER CO	.00	.00	.00	.00	.00
42-456-00-00-000-0000 62201699 SINKING FUND BLDG IMP	41,850.00	.00	.00	41,850.00	.00
42-459-00-00-000-0000 31700000 SINKING FUND CONTRACT	.00	.00	.00	.00	.00
42-456-00-06-000-0000 62201700 SINKING FUND BLDG IMP	28,389.24	.00	.00	28,389.24	.00
42-456-00-06-000-0000 62201701 SINKING FUND BLDG IMP	143,713.00	.00	.00	143,713.00	.00
42-456-00-06-000-0000 62201704 SINKING FUND BLDG IMP	125,441.00	.00	48,197.00	125,441.00	.00
42-456-00-06-000-0000 62201706 SINKING FUND BLDG IMP	580,200.00	.00	460,602.60	580,200.00	.00
42-456-00-07-000-0000 64109215 SINKING FUND NEW FURN	199,300.00	.00	66,137.33	199,300.00	.00
42-456-00-08-000-0000 62201697 SINKING FUND BLDG IMP	154,428.11	.00	.00	154,428.11	.00
42-456-00-08-000-0000 62201700 SINKING FUND BLDG IMP	3,225.00	.00	.00	3,225.00	.00
42-456-00-08-000-0000 62201701 SINKING FUND BLDG IMP	30,000.00	.00	.00	30,000.00	.00
42-456-00-08-000-0000 62201703 SINKING FUND BLDG IMP	143,000.00	.00	21,980.48	143,000.00	.00
42-456-00-08-000-0000 62201707 SINKING FUND BLDG IMP	248,700.00	.00	30,990.51	248,700.00	.00
42-456-00-11-000-0000 62201701 SINKING FUND BLDG IMP	23,750.00	.00	.00	23,750.00	.00
42-456-00-12-000-0000 62201697 SINKING FUND BLDG IMP	44,403.19	.00	.00	44,403.19	.00
42-456-00-12-000-0000 62201700 SINKING FUND BLDG IMP	6,410.00	.00	.00	6,410.00	.00
42-456-00-17-000-0000 62201698 SINKING FUND BLDG IMP	9,470.00	.00	.00	9,470.00	.00

## 5. How do I view my expenditure ledger?

- **Go to:**
  - Main Menu – Fund Accounting – Entry & Processing – Budget Ledgers – Expenditure Ledger



The screenshot shows the eFinancePLUS application interface. The browser address bar displays the URL: <http://admin-lanapp/gas2.50/wa/sua/411cb4cdc7e17fed52adb6881e>. The application title is "eFinancePLUS a PLUS 360 Application" and the user is logged in as "eFinancePlus - LANSING SD 5.1 119115".

The main menu is expanded to show the "Fund Accounting" section, which includes the following options:

- Entry & Processing (highlighted)
- Periodic Routines
- Reports
- Reference Tables
- State

The "Budget Ledgers" section is expanded, showing the following options:

- Expenditure Ledger (highlighted with a red arrow)
- Project Ledger
- Revenue Ledger

The "Details & Displays" section includes:

- Vendor Transactions

The "General Ledger" section includes:

- Balance Sheet
- Batch Journal Entries
- Batch Last Year Journal Entries

The "Payable Entry" section includes:

- Change Accounts Payable
- Post Accounts Payable
- Standard Payables

The "Vendor Checks" section includes:

- Bank Transmission File

The interface also shows a search bar and a "Date" field in the bottom right corner.

## 5. How do I view my expenditure ledger?

- When the Expenditure Budgets screen pops up, click “OK”. This will show you all of the accounts you have access to.
- If you would like to narrow your search, type in any known information in the boxes under “Selection Criteria”.

Expenditure Budgets - LANSING SD 5.1 119115 - Internet Explorer

eFinancePLUS a PLUS 360 Application Expenditure Budgets - LANSING SD 5.1 119115 KATIE KENNEDY

Display Through... Adjust Budget Transfer Inactivate Period Balances Requisitions Budget Control Delete All Selected

Date: 03/22/2016 Through Period: 05

**Selection Criteria**

Year: [Dropdown] FUND: [Dropdown]  
 ASN: [Text Box] FUNCTION: [Dropdown]  
 Account: [Text Box] DISCRETIONARY 1: [Dropdown]  
 Budget Control ASN: [Text Box] BUILDING: [Dropdown]  
 Budget Control Account: [Text Box] DEPARTMENT: [Dropdown]  
 Status: [Dropdown] GRANT: [Dropdown]

[Find] [Advanced]

Year	ASN	Account	Budget	Period Exp	YTD Expense	Encumbrances	Balance	Title	Account Title	Budget Organ	Account	Status
16	111110000008303	59900000	0.00	0.00	0.00	0.00	0.00	8303 111 CENT	NON-TEACH SUPP	111110000008303	59900000	Active
16	1111100110000000	59900000	1,200.00	0.00	274.14	375.86	550.00	111 PATTENGL	NON-TEACH SUPP	1111100110000000	59900000	Active
16	1111100110008003	59900000	0.00	0.00	0.00	0.00	0.00	8003 111 MSU A	NON-TEACH SUPP	1111100110008003	59900000	Active
16	1111100110008004	59900000	225.40	0.00	0.00	181.96	43.44	MSU ALLIANCE	NON-TEACH SUPP	1111100110008004	59900000	Active
16	1111100110008005	59900000	1,085.00	0.00	471.94	57.26	555.80	1415 MSU ALLI	NON-TEACH SUPP	1111100110008005	59900000	Active

## 6. How do I enter a requisition?

- **Go to:**
  - Main Menu – Purchasing – Requisition Processing - Requisitions

The screenshot displays the eFinancePLUS application interface. The browser address bar shows the URL: <http://admin-lanapp/gas2.50/wa/sua/cd3f59e4158550e552f1c5aa23c>. The application title is "eFinancePLUS a PLUS 360 Application" and the user is logged in as "eFinancePlus - LANSING SD 5.1 119115".

The main menu is expanded to show the "Purchasing" section. Under "Purchasing", the "Entry & Processing" sub-menu is selected. The "Entry & Processing" sub-menu is further expanded to show the following options:

- Change Order Processing
  - Approve/Deny Change Orders
  - Change Orders
  - Exception Post COs
- Miscellaneous
  - Purge Requisitions/POs
  - Receive Ordered Materials
- Purchase Order Processing
  - Approve/Deny Purchase Orders
  - Exception Post POs
  - Mass Convert Reqs to POs
  - Next Year Purchase Orders
  - Purchase Orders
- Requisition Processing
  - Approve/Deny Requisitions
  - Next Year's Requisitions
  - Print Requisitions
  - Requisitions**

A red arrow points to the "Requisitions" option in the "Requisition Processing" sub-menu.

## 6. How do I enter a requisition?













- When the requisitions screen pops up, click the plus button in the upper left hand corner to create a new requisition.

Requisition Listing - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application




Requisition Listing - LANSING SD 5.1 119115



Copy Print Requisitions Budget Transfers Budget Adjustments Set Period

Date: 03/10/2016 Period: 5/16

### Search Criteria

Year: 2016  
Requisition:   
Buyer:   
Date Requested:    
Date Required:    
Recommended Vendor:    
Ship To:   
Approval Group:   
Attention:   
Status:

 Find  Advanced

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	Approval Group	Amount	Status	In...
-------------	------	-------------	----------	-------------	-------	----------------	--------	--------	-------

## 6. How do I enter a requisition?

- This is what a new requisition screen looks like.
- You will start by completing the “Header” tab.

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANSING SD 5.1 119115

KATIE

Add Item

Date: 03/10/2016 Period: 5/16

**Header** Line Items

**General Information**

Requisition \* 1602823

Approval Group \* [dropdown]

Requested 03/10/2016 [calendar icon]

Required [calendar icon]

Vendor [search icon] **Alternate Order Address**

Vendor Address

Add Attachment?   Continuous

Freight [text box]

Comments [text box]

Buyer [text box]

Attention [text box]

Ship To \* [dropdown]

Item	Description	Quantity	Price	Total	ASN	Account	Status	
------	-------------	----------	-------	-------	-----	---------	--------	--

## Required items to fill out in the “Header” tab:

1. Approval Group
2. Vendor
3. Buyer
4. Attention
5. Ship To

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANSING SD 5.1 119115

Add Item

Date: 03/10/2016 Period: 5/16

Header Line Items

**General Information**

Requisition *	1602823	Add Attachment?	<input type="checkbox"/>	<input checked="" type="checkbox"/> Continuous
Approval Group *		Freight		
★ Requested	03/10/2016	Comments		
★ Required		★ Buyer		
★ Vendor		★ Attention		
Vendor Address		★ Ship To *		

Alternate Order Address



# 1. Approval Group

- **6 Basic Types:**

- 1. NGF – Non Grant Funded**

- a) Most common
- b) Grant = 0000

- 2. GF – Grant Funded**

- a) Grant is anything but 0000

- 3. NGFE – Non Grant Funded Equipment**

- a) Grant = 0000
- b) AND object code = 6\*\*\* or 3450

- 4. GFE – Grant Funded Equipment**

- a) Grant is anything but 0000
- b) AND object code = 6\*\*\* or 3450

- 5. MGF – Magnet Grant Funded**

- a) Grant = 1518

- 6. MGFE – Magnet Grant Funded Equipment**

- a) Grant = 1518
- b) AND object code = 6\*\*\* or 3450

- **Approval Number:**

- Always equal to Department Code
  - Ex: 270 – HR
- If Department Code is blank (000) then the number defaults to Building Code
  - Ex: 08 - Everett

ASN			ACCOUNT				
11	125	00	08	120	1518	5990	0000
Fund	Function Code	Descriptive	Building	Department	Grant	Object Code	Activity/Course Code

## 2. Vendor

- Search for the vendor you wish to use by clicking on the magnifying glass.

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANS

Add Item


⊕ ☒ 🖨️ ✓ BACK 📄 📁 💾 📄

Date: 03/10/2016 Period: 5/16

Header Line Items

**General Information**

Requisition *	<input type="text" value="1602823"/>
Approval Group *	<input type="text"/>
Requested	<input type="text" value="03/10/2016"/> 📅
Required	<input type="text"/> 📅
Vendor	<input type="text"/> 🔍 <b>Alternate Order Address</b>
Vendor Address	



# Vendor Search

- When searching for vendors, accounts, etc., use an asterisk (\*) as a wild card before and/or after to show all items that may be related to your search.
- Click on the vendor you wish to use and then click the green OK button to have the vendor automatically fill in.

Vendor Information - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application Vendor Information - LANSING SD 5.1 119115

Vendor List

Date: 03/10/2016 Period: 5/16

**Search Criteria**

Vendor Code

Inactive Status

Vendor Name

Search Name

Purchasing City

Purchasing State

Commodity Class

Vendor Code	Vendor Name	Purchasing City	Purchasing State
0 match(es) found.			

Vendor Information - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application Vendor Information - LANSING SD 5.1 119115

Vendor List

Date: 03/10/2016 Period: 5/16

**Search Criteria**

Vendor Code

Inactive Status

Vendor Name

Search Name

Purchasing City

Purchasing State

Commodity Class

Vendor Code	Vendor Name	Purchasing City	Purchasing State	Purchasing Phone	Inactive Status
10036801	DBI BUSINESS INTERIORS	LANSING	MI	517-485-3200	

1 match(es) found.

### 3. Buyer

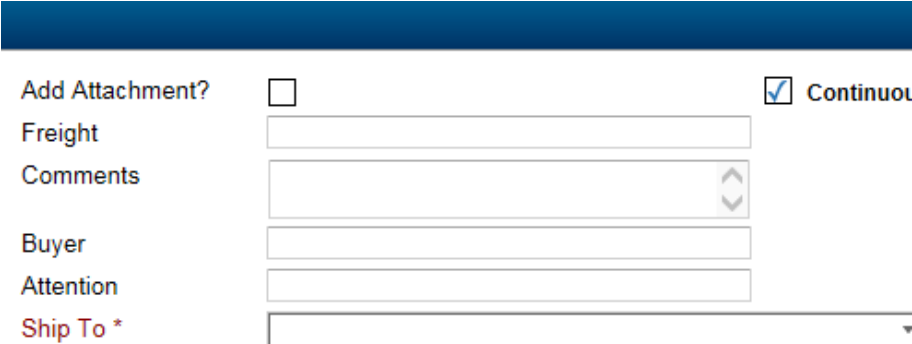
- Press the “tab” button on your keyboard until you reach the “Buyer” box.
- Enter your name

### 4. Attention

- Press the “tab” button one time until you reach the “Attention” box.
- Enter the name of the person buying the items and/or your name.

### 5. Ship To

- Press the “tab” button one time until you reach the “Ship To” box.
- Click the down arrow and select the building you want the items to be delivered to.



A screenshot of a web form with a dark blue header bar. The form contains the following elements:

- Add Attachment?**: A checkbox, currently unchecked.
- Freight**: A text input field.
- Comments**: A text area with a vertical scrollbar and a downward-pointing arrow on the right side.
- Buyer**: A text input field.
- Attention**: A text input field.
- Ship To \***: A dropdown menu with a downward-pointing arrow on the right side.

In the top right corner of the form area, there is a checked checkbox followed by the text "Continuou".

## Required items to fill out in the “Line Items” tab:

1. Description
2. Quantity
3. Unit Price
4. ASN
5. Account
6. Amount

Note: Please leave the following **blank**

- Commodity
- Stock Number
- Bid Item
- Fixed Assets

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANSING SD 5.1 119115

Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item

Date: 03/10/2016 Period: 5/16

Header Line Item (1 of 1)

**Detail Information**

Requisition 1602823 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

ASN	Account	PROJECT	Account	Percentage	Amount
				1.00	0.00

# 1. Description

- This is the most important part of the requisition. The more information, the better!
- Please use the following templates for your requisition description.
- 1 Quote is required for all orders over \$3,000. 3 Quotes are required for all orders over \$10,000
- DO NOT FORGET TO ADD A SHIPPING LINE. You must calculate the shipping or your requisition will be sent back for correction. If shipping is free, write FREE SHIPPING in the comments box.

## Specific Purchase Order (Items not yet ordered or received)

- Item #
- Description of Item
- Quote # - "Please attach to PO when sent to vendor"

## Blanket Purchase Order

- Blanket PO for [description] to be ordered by [name(s)]. Order by 06/01/2019. Do not exceed PO amount.

## Payment for Invoice

- Invoice #
- Description of items/services on invoices

**THIS IS FOR EMERGENCIES ONLY – ORDERS SHOULD NEVER BE PLACED WITHOUT AN APPROVED PO**

# 1. Description

## Conference Registration

- Name of attendee(s), Conference Name, Dates of Conference.
- Please mail check by [Due Date for registration]
- Registered online **OR** Please include registration form with check

## Conference Hotel

- Name of attendee(s), Confirmation number(s), Dates of stay, Conference Name
- Note: Include separate line for proper tax percentage (MI hotels are excluded from 6% sales tax)
- Please include sales tax exempt form with check

## CSA

- CSA for [Name] for [Description] to be paid [frequency, dates, amounts].

## Mileage Reimbursement

- Mileage Reimbursement for [Name] for [Dates traveled].
- Note: Make sure to have the correct mileage rate.

Once you have completed the description, hit the tab button to fill out the rest of the required fields.

2. Quantity
3. Unit Price
4. ASN
5. Account
6. Amount

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANSING SD 5.1 119115

Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item

Date: 03/10/2016 Period: 5/16

Header Line Item (1 of 1)

**Detail Information**

Requisition 1602823 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

ASN	Account	PROJECT	Account	Percentage	Amount
				1.00	0.00



If you do not know the ASN or Account to use, you can click on the magnifying glass to search for an ASN or Account the same way we search for vendors.

ASN	Account	PROJECT	Account	Percentage	Amount	
<input type="text"/>				1.00	0.00	



# SHIPPING

## **ALWAYS REMEMBER TO INCLUDE A SHIPPING LINE ITEM**

Here are some common vendors with predetermined shipping amounts:

Apple – no shipping charge

CDWG– no shipping charge

Netech/Presidio– no shipping charge

Precision Data Productions– no shipping charge

Johnny Macs– no shipping charge

DBI– no shipping charge

Central Michigan Paper – no shipping charge over \$250

School Specialty – no shipping charge over \$29

Amazon Business – no shipping charge over \$49

Lakeshore Learning -15% shipping

Classroom Direct – Free shipping on orders over \$49

HC Berger – 3% shipping for items in the scope of your copier agreement, 5.5% for any other supplies not covered in your agreement.

## Grant Funded Purchases

- When entering a requisition using grant funds, make sure to check the grant narrative/budget to make sure the items you are purchasing are **allowable**.


ASN						ACCOUNT	
Fund	Function Code	Descriptive	Building	Department	Grant	Object Code	Activity/Course Code
11	125	00	08	120	1518	5990	0000



## Split Funded Purchases

- If you want to purchase an item and use multiple accounts, simply put the amount for that particular funding line and hit tab, this will bring you down to line 2 and you will proceed with the same processes of associating ASN & Account numbers and amounts until the line item is fully funded.

Pricing					
Measure	<input type="text"/>	Extended Amount *	<input type="text" value="10.00"/>	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="10.00"/>
Unit Price *	<input type="text" value="10.0000"/>	Trade/Discount *	<input type="text" value="0.00"/>	Distribution Method *	<input type="text" value="A - Amount"/>
		Shipping	<input type="text" value="0.00"/>		

ASN	Account	PROJECT	Account	Percentage	Amount
1125200002640000	59100000			0.50	5.00
1125200002480000	59100000			0.50	5.00

## Split Funded Purchases – Grant & Non Grant

- NEVER comingle grant and non grant accounts on one requisition. Please submit two separate requisitions and include the corresponding requisition number in the description so they can be sent to the vendor together.
  - Example:
    - Req # 1601234 Description: “Corresponds with Requisition 1601235”
    - Req # 1601235 Description: “Corresponds with Requisition 1601234”

ASN						ACCOUNT	
11	125	00	08	120	1518	5990	0000
Fund	Function Code	Descriptive	Building	Department	Grant	Object Code	Activity/Course Code


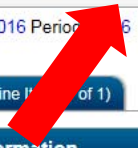


- Once you have finished filling out the line item tab for your first item, click the Green OK Button in the upper Left corner to advance to the next line item.
- If this is your only line item and there are no additional line items, click the save button to submit your requisition for review.

New Requisition Information - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

New Requisition Information - LANSING SD 5.1 119115

Approval Status Vendor Quotes Tax Rate Add Item Delete Line Item








Date: 03/10/2016 Period: 6

Header Line Item (of 1)

**Detail Information**

Requisition: 1602823 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

ASN	Account	PROJECT	Account	Percentage	Amount
				1.00	0.00

## 7. What do I do with purchasing/accounting documents?

\*Purchasing@lansingschools.net

- All requisition and purchase order questions
- Requisition documentation (Quotes)

\*PCards@lansingschools.net

- Purchasing card logs, receipts
- All purchasing card questions

\*Facilities@lansingschools.net

- Questions relating to facilities rentals

\*AP@lansingschools.net

- Packing Slips, Invoices, Statements

\*hrdept@lansingschools.net

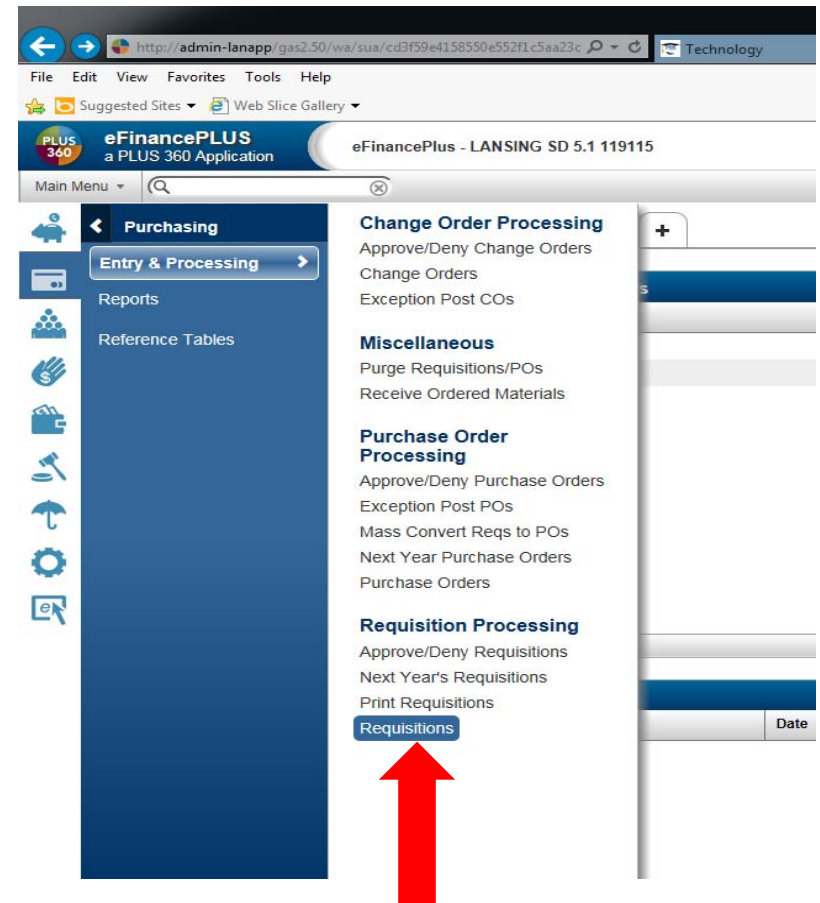
- Requisitions, Additional Hours Forms, Co-Curricular Forms, Overload Forms

\*Accounting@lansingschools.net

- Budget transfers and Expense Transfer forms
- New account requests
- Grant accounting questions

## 8. My requisition was returned, how do I correct it?

- **Go to:**
  - Main Menu – Purchasing – Requisition Processing – Requisitions





## 8. My requisition was returned, how do I correct it?

- When the requisitions screen pops up, enter the requisition number you wish to correct/change and then double click on the requisition to open it.

Requisition Listing - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

Requisition Listing - LANSING SD 5.1 119115

Copy Print Requisitions Budget Transfers Budget Adjustments Set Period

Date: 03/10/2016 Period: 5/16

### Search Criteria

Year	2016	Recommended Vendor	<input type="text"/>
Requisition	<input type="text"/>	Ship To	<input type="text"/>
Buyer	<input type="text"/>	Approval Group	<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 Group	Amount	Status	In...
-------------	------	-------------	----------	-------------	-------	----------------	--------	--------	-------

## 8. My requisition was returned, how do I correct it?

- Once you have the requisition pulled up, click the “Line Items” tab.
- Click “approval status” on the top right corner of the screen.

The screenshot displays the eFinancePLUS application interface. At the top, the browser title is "Requisition Information - 1602823 - LANSING SD 5.1 119115 - Internet Explorer". The application header includes the PLUS 360 logo and the text "eFinancePLUS a PLUS 360 Application". The main navigation bar contains tabs for "Approval Status", "Vendor Quotes", "Tax Rate", "Add Item", and "Delete Line Item". Below the navigation bar, there are several icons, including a red arrow pointing to the "Approval Status" tab. The date is set to "03/11/2016" and the period is "5/16". The "Header" tab is selected, and the "Line Item (1 of 1)" tab is active. The "Detail Information" section shows the following fields:

Requisition	1602823	1	Status	<input type="checkbox"/> Shipping Charge	<input type="checkbox"/> Continuous
Commodity				<input type="checkbox"/> C - Needs Correction	
Stock Number					
Bid Item	<input type="checkbox"/>				
Fixed Asset	<input type="checkbox"/>				

## 8. My requisition was returned, how do I correct it?

- This screen will tell you the why the line item was returned for correction.
- When finished reading the comments, click back and adjust your requisition accordingly. When finished correcting the requisition, click “Save” so the requisition can be routed back for approval.

The screenshot displays the eFinancePLUS application interface. The main window is titled "Requisition Information - 1602823 - LANSING SD 5.1 119115". A modal window titled "Requisition Approval - LANSING SD 5.1 119115" is open, showing a table of approval actions. The first row is highlighted in yellow and has a red border around the "Comments" column, which contains the text "PLEASE USE A 5110 ACCOUNT, NOT 5910".

**Requisition Information**

Date: 03/10/2016 Period: 5/16

Header Line Item (1 of 1)

**Detail Information**

Requisition: 1602823 Line No: 1

Commodity: [Blank]

Stock Number: [Blank]

Bid Item:

Fixed Asset:

Description: TEST PARTIAL SAVE

**Pricing**

Measure: [Blank] Extended Price: [Blank]

Quantity: 1.00 Discount: [Blank]

Unit Price: 1.0000 Trade/Disc: [Blank] Shipping: [Blank]

ASN: 1125200002480000 Account: 59100000 PROJ: [Blank]

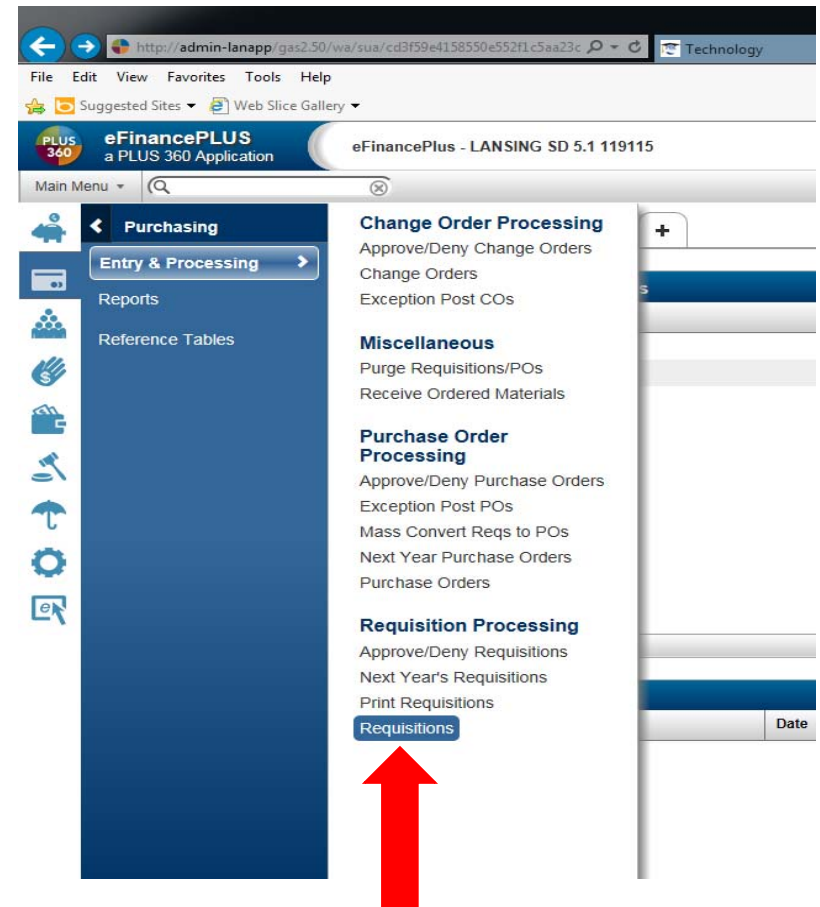
**Approval History**

Date	Time	Level/Code	Approver	Action Date	Action	Required	Comments
03/10/2016	16:41:39	1	kennekat	03/10/2016	C - Needs Co	Y - Yes	PLEASE USE A 5110 ACCOUNT, NOT 5910
03/10/2016	16:40:03	1			O - No Action	Y - Yes	REQUISITION ADDED - ROUTED FOR APPROVAL

Back

## 9. What is the status of my requisition?

- **Go to:**
  - Main Menu – Purchasing – Requisition Processing – Requisitions



The screenshot displays the eFinancePLUS application interface. The browser address bar shows the URL: <http://admin-lanapp/gas2.50/wa/sua/cd3f59e4158550e552f1c5aa23c>. The application title is "eFinancePLUS a PLUS 360 Application" and the user is logged in as "eFinancePlus - LANSING SD 5.1 119115".

The navigation menu is open, showing the following structure:

- Purchasing**
  - Entry & Processing** (highlighted)
  - Reports
  - Reference Tables

The "Entry & Processing" sub-menu is expanded, showing the following options:

- Change Order Processing**
  - Approve/Deny Change Orders
  - Change Orders
  - Exception Post COs
- Miscellaneous**
  - Purge Requisitions/POs
  - Receive Ordered Materials
- Purchase Order Processing**
  - Approve/Deny Purchase Orders
  - Exception Post POs
  - Mass Convert Req to POs
  - Next Year Purchase Orders
  - Purchase Orders
- Requisition Processing**
  - Approve/Deny Requisitions
  - Next Year's Requisitions
  - Print Requisitions
  - Requisitions** (highlighted with a red arrow)

## 9. What is the status of my requisition?

- When the requisitions screen pops up, enter the requisition number you wish to check the status of and click the green “OK” button.
- If you do not know the requisition number, you can use the “Ship To” dropdown and click on your building before hitting “OK”. This will pull up all requisitions that your building has submitted. You can look through the list and double click on the one you wish to check on.

Requisition Listing - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application Requisition Listing - LANSING SD 5.1 119115

Copy Print Requisitions Budget Transfers Budget Adjustments Set Period

Date: 03/10/2016 Period: 5/16

**Search Criteria**

Year: 2016  
Requisition:   
Buyer:   
Date Requested:   
Date Required:   
Recommended Vendor:   
Ship To:   
Approval Group:   
Attention:   
Status:

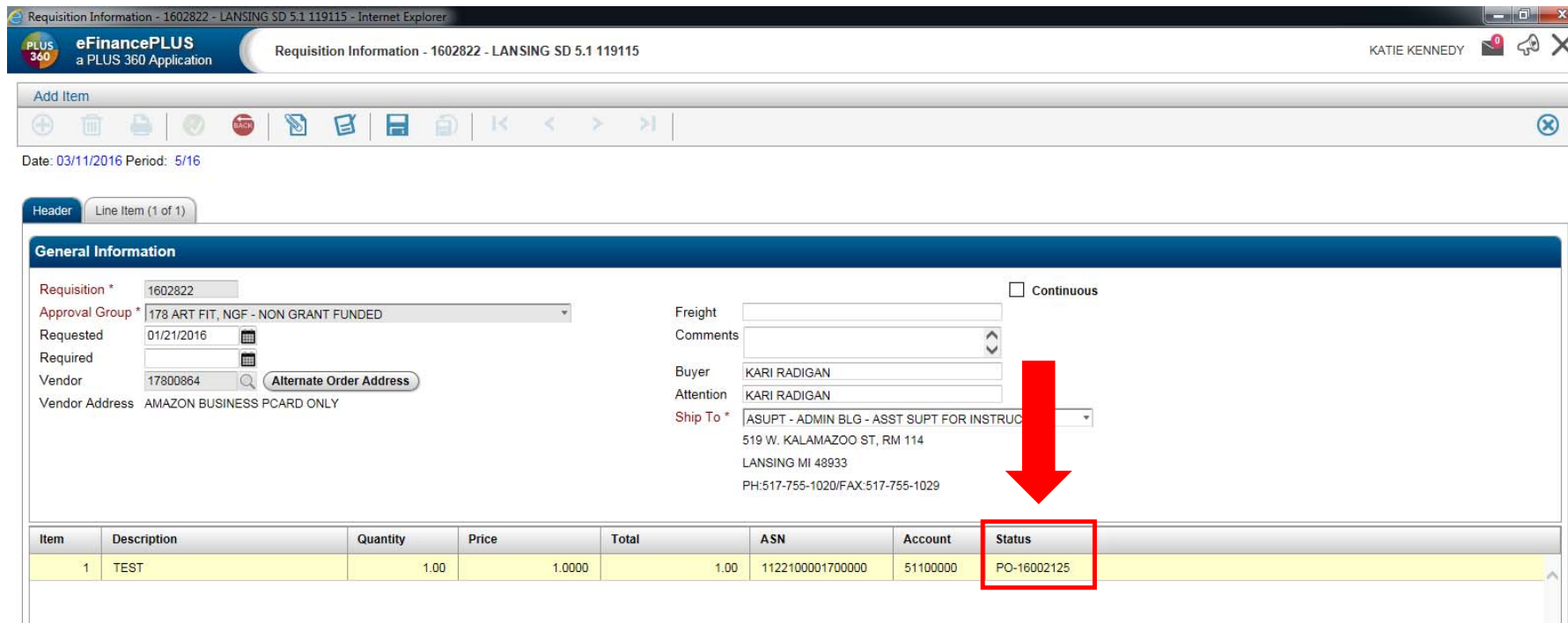
Find Advanced

Requisition	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	Approval Group	Amount	Status	In...
-------------	------	-------------	----------	-------------	-------	----------------	--------	--------	-------

-If the status of the req says “Printed”, the req has been converted to a PO and faxed to the vendor.  
-If the status is blank, you will have to go into the requisition to get more detail.

## 9. What is the status of my requisition?

- Once inside the requisition, the status will say “Open”, “Needs Correction”, or “PO #xxxxxxx”
- If this requisition is Open or in Needs Correction, purchasing has not yet approved the requisition and may be waiting on the required supporting documentation or for you to update this requisition. Please see the previous section of this guide to find out how to correct a requisition.
- If this requisition has a PO # assigned, it has been approved at the requisition level but still needs to be approved by all necessary signers at the PO level.



Requisition Information - 1602822 - LANSING SD 5.1 119115 - Internet Explorer

eFinancePLUS  
a PLUS 360 Application

Requisition Information - 1602822 - LANSING SD 5.1 119115

KATIE KENNEDY

Add Item

Date: 03/11/2016 Period: 5/16

Header Line Item (1 of 1)

**General Information**

Requisition \* 1602822  Continuous

Approval Group \* 178 ART FIT, NGF - NON GRANT FUNDED

Requested 01/21/2016

Required

Vendor 17800864 [Alternate Order Address](#)

Vendor Address AMAZON BUSINESS PCARD ONLY

Freight

Comments

Buyer KARI RADIGAN

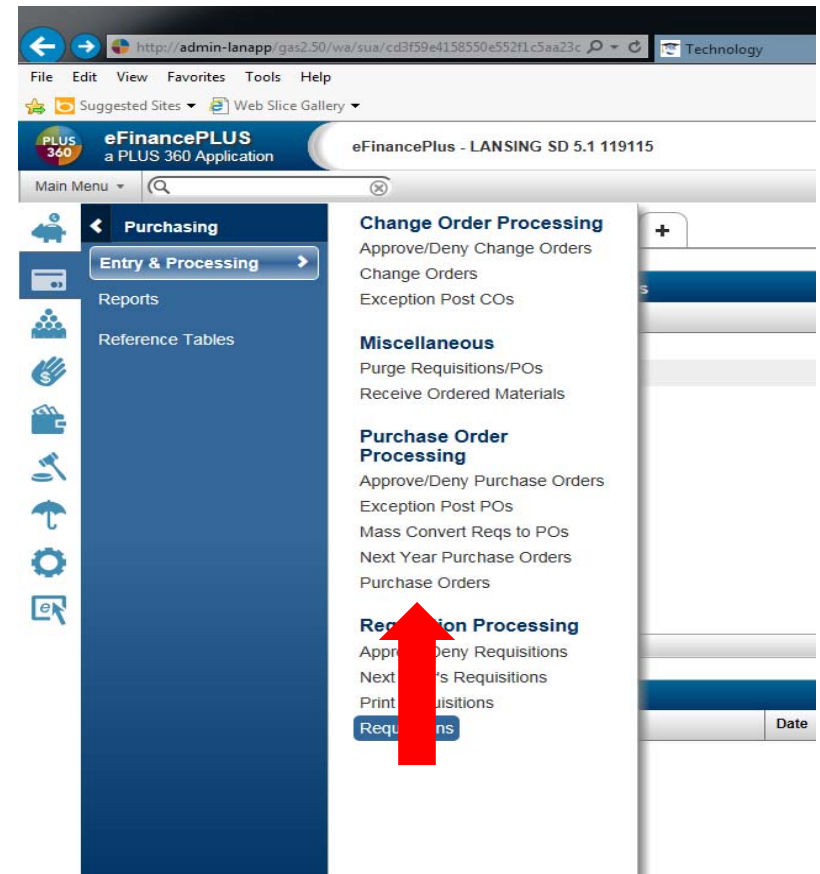
Attention KARI RADIGAN

Ship To \* ASUPT - ADMIN BLG - ASST SUPT FOR INSTRUC  
519 W. KALAMAZOO ST, RM 114  
LANSING MI 48933  
PH:517-755-1020/FAX:517-755-1029

Item	Description	Quantity	Price	Total	ASN	Account	Status
1	TEST	1.00	1.0000	1.00	1122100001700000	51100000	PO-16002125

## 10. What is the status of my PO?

- **Go to:**
  - Main Menu – Purchasing – Purchase Order Processing – Purchase Orders



## 10. What is the status of my PO?

- When the purchase order screen pops up, enter the PO number you wish to check the status of and click the green “OK” button.
- If you do not know the PO number, you can use the “Ship To” dropdown and click on your building before hitting “OK”. This will pull up all PO’s that your building has submitted. You can look through the list and double click on the one you wish to check on.

Purchase Order Listing - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application Purchase Order Listing - LANSING SD 5.1 119115

Copy Budget Transfers Budget Adjustments Set Period

Date: 03/11/2016 Period: 5

**Search Criteria**

Year: 2016  
Purchase Order:   
Requisition:   
Buyer:   
Date Issued:   
Date Required:   
Description:   
Vendor:   
Ship To:   
Approval Group:   
Attention:   
Status:

Find Advanced

Purchase Order	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	Approval Group	Amount	Status	Indicators
----------------	------	-------------	----------	-------------	-------	----------------	--------	--------	------------

-If the status says “Printed”, the PO has been approved and faxed to the vendor.  
-If the status says “Complete”, you will have to go into the PO to get more detail.



## 10. What is the status of my PO?

- Once inside the PO, the status will say “Open”, “Needs Correction”, “Partly Approved”, or “Posted”
- If this requisition is “Open”, “Partly Approved”, or in “Needs Correction”, this has not yet been fully approved and may be waiting for you to update this PO. Please see the previous section of this guide to find out how to correct a requisition. Correcting a PO is very similar to correcting a requisition.
- If this PO says “Posted”, it has just been fully approved and will be printed and faxed to the vendor within one business day.

Purchase Order Information - 16002060 - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

Purchase Order Information - 16002060 - LANSING SD 5.1 119115

Add Item

Date: 03/11/2016 Period: 5/16

Header Line Item (1 of 3)

### Header Information

Purchase Order \* 16002060  Continuous

Requisition 1602734

Approval Group \* 33 FST VIEW, GF - GRANT FUNDED

Status \* C - Complete

Blanket

Contract

Confirming

Vendor \* 10388101

REALLY GOOD STUFF  
PO BOX 386  
CONTRACT: TIPS/TAPS 2062812  
BOTSFORD CT 06404

Issued 11/16/2015

Required

Expires

Terms NET 30 DAYS

Freight

Description

Buyer CYNTHIA WARD

Attention CYNTHIA WARD

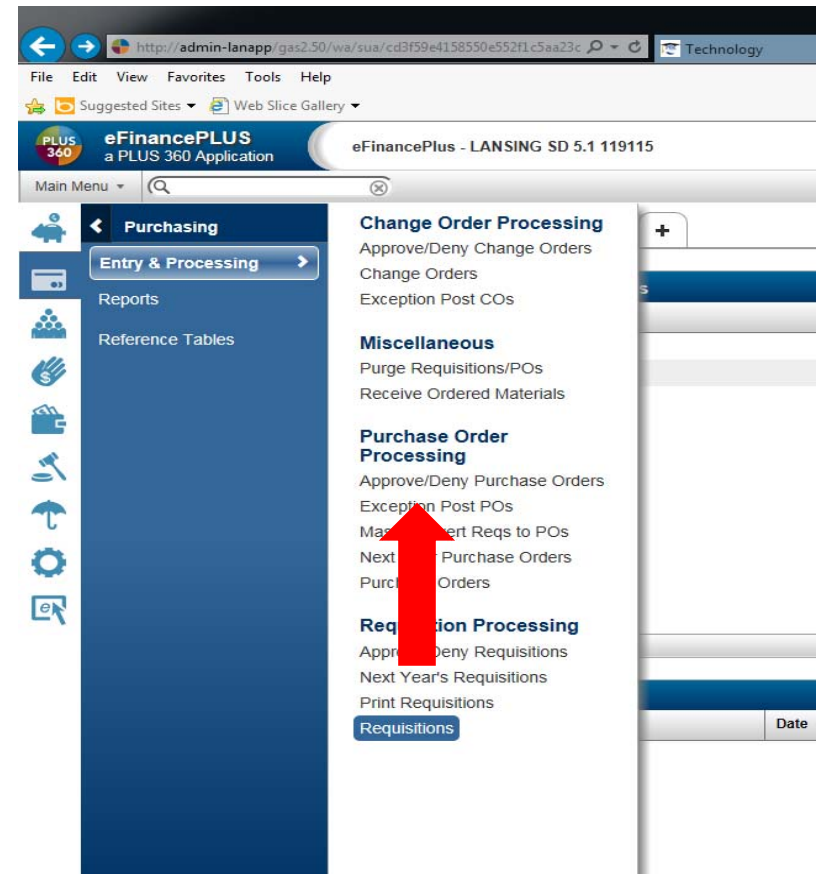
Ship To \* 033 - FOREST VIEW ELEMENTARY  
3119 STONELEIGH DRIVE  
LANSING MI 48910  
PH:517-755-1330/FAX:517-755-1339

Encumber \* Y - Post Encumbrance

Item	Description	Quantity	Price	Total	ASN	Account	Approval Status	Changes
1	TWO SIDED PRIMARY LINE MAGNETIC WRITE	6.00	49.5000	297.00	1111100330008816	59900000	O - Open	No
2	WRITE & WIPE CENTER SIGNS SET OF 5	2.00	24.0000	48.00	1111100330008816	59900000	O - Open	No

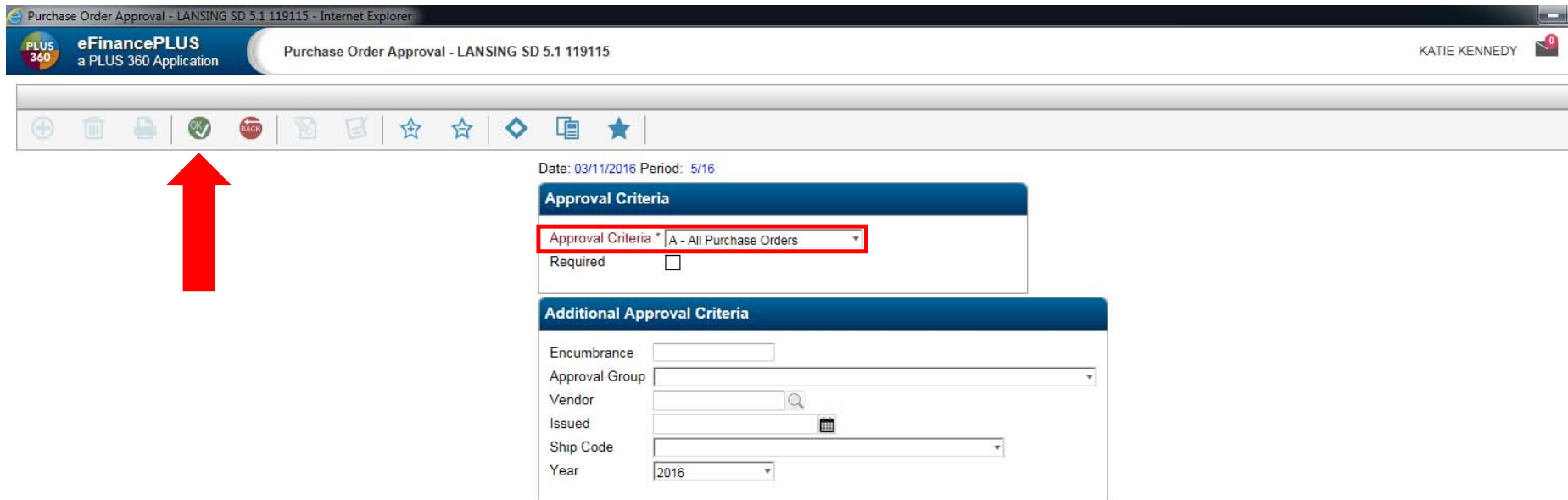
# 11. How do I approve a PO?

- **Go to:**
  - Main Menu – Purchasing – Purchase Order Processing – Approve/Deny Purchase Orders



# 11. How do I approve a PO?

- Once the screen pops up you can choose to look at all PO's needing approval or you can use the drop down to select "Approved at Lower Level". This will show you only the Purchase Orders to approve when it is your turn to approve them. Approving PO's when it is your turn is the recommended option, but you may approve all PO's if necessary.
- Click the green "OK" button to view PO's for approval.



Purchase Order Approval - LANSING SD 5.1 119115 - Internet Explorer

PLUS 360 eFinancePLUS a PLUS 360 Application Purchase Order Approval - LANSING SD 5.1 119115 KATIE KENNEDY

OK

Date: 03/11/2016 Period: 5/16

**Approval Criteria**

Approval Criteria \* A - All Purchase Orders

Required

**Additional Approval Criteria**

Encumbrance

Approval Group

Vendor

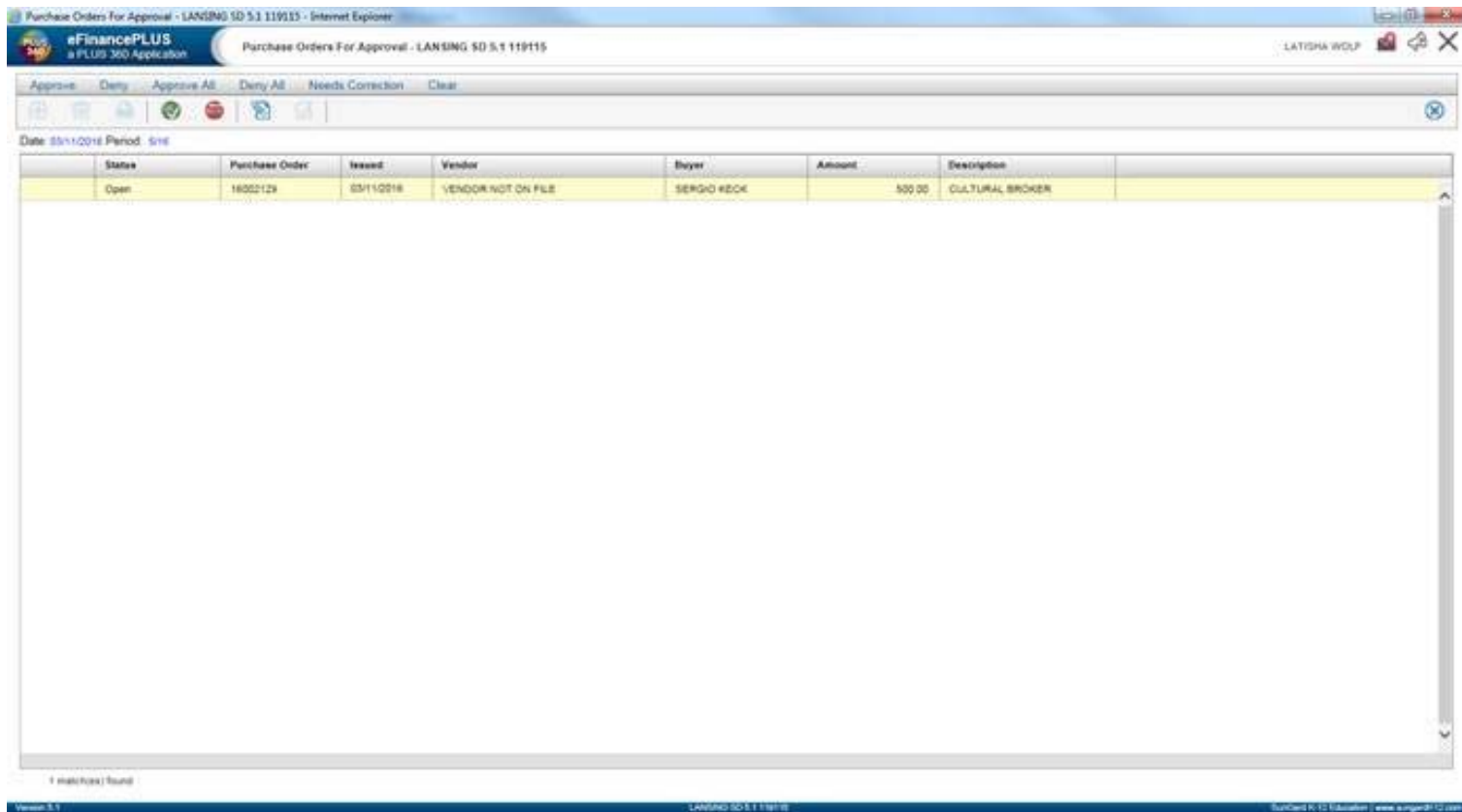
Issued

Ship Code

Year 2016

# 11. How do I approve a PO?

- Next you will see a list of PO's pending your approval. Double click on each one to view the details of the PO.



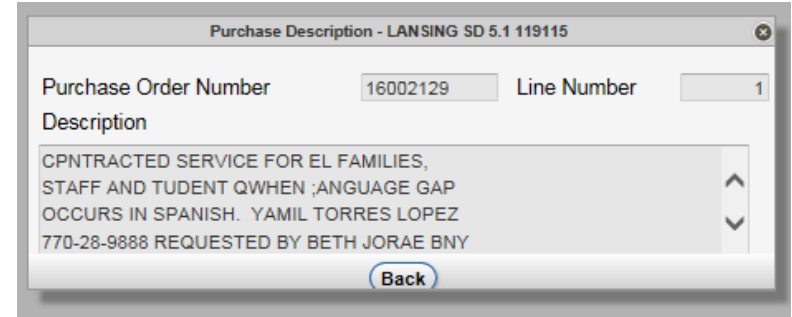
The screenshot displays the eFinancePLUS application interface. At the top, the browser title is "Purchase Orders For Approval - LANSING SD 5.1 119115 - Internet Explorer". The application header includes the "eFinancePLUS" logo and the text "a PLUS 360 Application". Below the header, there is a navigation bar with buttons for "Approve", "Deny", "Approve All", "Deny All", "Needs Correction", and "Clear". A toolbar contains several icons for actions like refresh, search, and print. The main content area shows a table with the following data:

Status	Purchase Order	Issued	Vendor	Buyer	Amount	Description
Open	1602129	03/11/2018	VENDOR NOT ON FILE	SERGIO RECK	500.00	CULTURAL BROKER

At the bottom of the window, there is a status bar with the text "4 match(es) found". The footer of the application contains the version number "Version 5.1", the application name "LANSING SD 5.1 119115", and the contact information "Support R-12 Education | www.singnet12.com".

# 11. How do I approve a PO?

- Once you are in the PO you would like to review, click the description box to carefully read the FULL description of the items being purchased.
- You may also click on the “Attachments” to view any related documents.
- Make sure to review each line of the PO carefully.



Date: 03/11/2016 Period: 5/16

Encumbrance: 16002129  
Approval Group: 022 BI-LING, NGF - NON... T FUNDED  
Ship Code: GSRP - HILL CENTER - G  
Description: CULTURAL BROKER

Vendor: 10777777 VENDOR NOT ON FILE  
Issued: 03/11/2016

Status	Line	Description	Quantity	Unit Price	Item Total	ASN	Account	PROJECT...	Account	Charge Amount	Status	Comment
Open	1	CPNTRACTED SERVICE	1.00	500.0000	500.00	1133100060220000	31900000			500.00	O - Open	

# 11. How do I approve a PO?

- If an item is split funded the account will say “Multiple”. Click on “Distributions” towards the top of the screen to get a breakdown by account.

The screenshot shows the eFinancePLUS interface for Purchase Order Approval. The 'Distributions' tab is highlighted with a red arrow. Below the main interface, a 'Purchase Order Charging' window is shown with a table of account details.

Item	ASN	Account	PROJECT...	Account	Amount	Account Budget	Account Balance
1	1133100060220000	31900000			500.00	10,600.00	4,550.00

# 11. How do I approve a PO?

- If you would like to approve the PO, click the “Approve All” button.
- Otherwise, you can click “Deny All” or “Needs Correction” as you see fit.
- Once finished, click the green “OK” to go back to the list of PO’s for approval.
- Using the “Approve All” and “Deny All” buttons are recommended so you do not forget to approve one of the line items accidentally. If only some of the items are approved the PO can get stuck in the system.

Purchase Order Approval - LANSING SD 5.1 119115 - Internet Explorer

eFinancePLUS  
a PLUS 360 Application

Purchase Order Approval - LANSING SD 5.1 119115

LATISHA WOLF

Approve Deny **Approve All** Deny All Needs Correction Clear Approval Status Description Distributions Vendor Quotes Comments

Date: 03/11/2016 Period: 5/16

Encumbrance: 16002129  
Approval Group: 022 BI-LING, NGF - NON GRANT FUNDED  
Ship Code: GSRP - HILL CENTER - GSRP  
Description: CULTURAL BROKER

Vendor: 10777777 VENDOR NOT ON FILE  
Issued: 03/11/2016

Status	Line	Description	Quantity	Unit Price	Item Total	ASN	Account	PROJECT...	Account	Charge Amount	Status	Comment
✓ Approved	1	CPNTRACTED SERVICE	1.00	500.0000	500.00	1133100060220000	31900000			500.00	P - Partly App	

# 11. How do I approve a PO?

- Once all the purchase orders for review are “Approved”, “Denied”, or sent back for “Needs Correction”, click the green “OK” button to finalize your status assigned to each PO.
- A pop up box will appear, click “OK”, and a report will generate.
- Click “Open” at the bottom of your screen to open the report
- You can print or save this report for your records if you would like, otherwise, you can just close out of the report.

The screenshot shows the eFinancePLUS application interface. At the top, there is a navigation bar with buttons for 'Approve', 'Deny', 'Approve All', 'Deny All', 'Needs Correction', and 'Clear'. Below this is a table of purchase orders. A red arrow points to the green checkmark icon in the 'Status' column of the first row, which is 'Approved'. The table has columns for Status, Purchase Order, Issued, Vendor, Buyer, Amount, and Description. Below the table, a print dialog box is open, titled 'Print - LANSING SD 5.1 119115'. The dialog has two sections: 'Destination' with radio buttons for 'File' and 'Screen' (selected), and 'File Options' with a text field for 'File Name' containing 'H:/rpt/masspo2.rpt'. A red arrow points to the 'OK' button at the bottom of the dialog.

Status	Purchase Order	Issued	Vendor	Buyer	Amount	Description
Approved	16002129	03/11/2016	VENDOR NOT ON FILE	SERGIO KECK	500.00	CULTURAL BROKER

Print - LANSING SD 5.1 119115

masspo2.rpt

Destination:  File  Screen

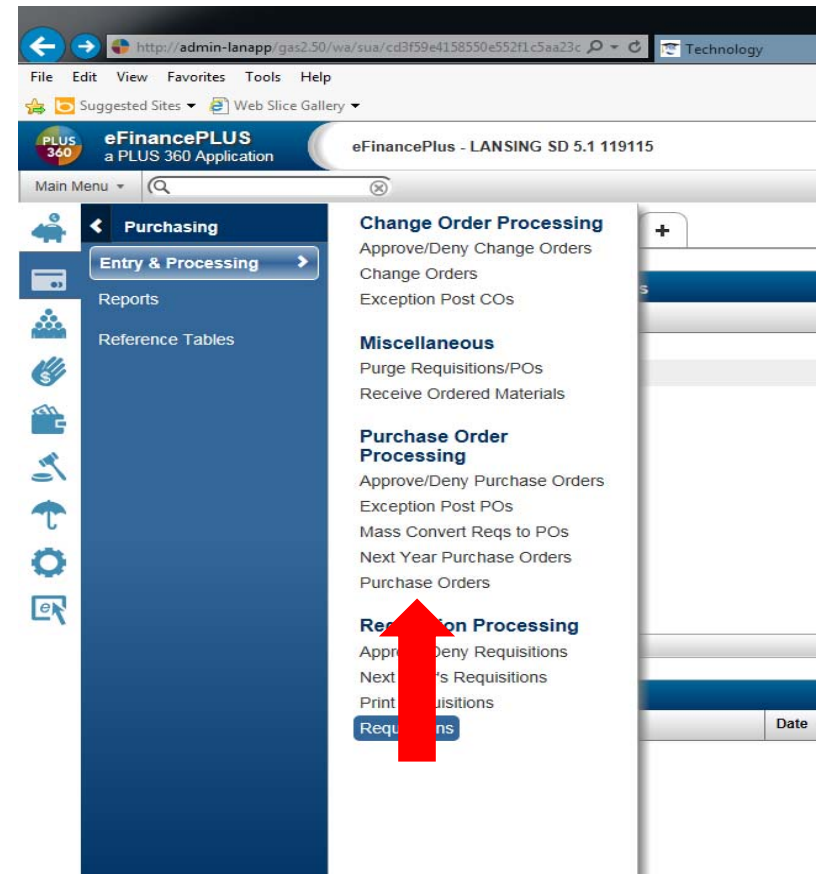
File Options: File Name: H:/rpt/masspo2.rpt

OK Back



## 12. How much is left on my blanket PO?

- **Go to:**
  - Main Menu – Purchasing – Purchase Order Processing – Purchase Orders



## 12. How much is left on my blanket PO?

- When the purchase order screen pops up, enter the PO number you wish to check the balance of and click the green “OK” button.
- If you do not know the PO number, you can use the “Ship To” dropdown and click on your building before hitting “OK”. This will pull up all PO’s that your building has submitted. You can look through the list and double click on the one you wish to check on.

Purchase Order Listing - LANSING SD 5.1 119115 - Internet Explorer

**PLUS 360 eFinancePLUS**  
a PLUS 360 Application

Purchase Order Listing - LANSING SD 5.1 119115

Copy Budget Transfers Budget Adjustments Set Period

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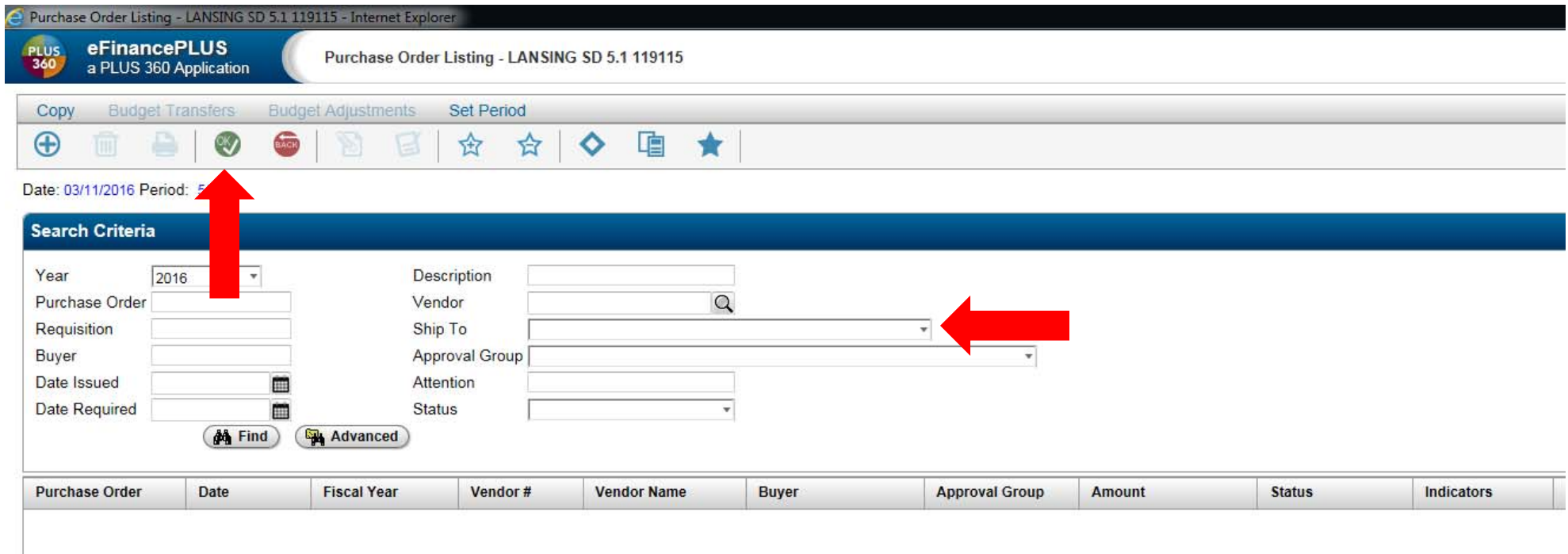
Date: 03/11/2016 Period: 5

### Search Criteria

Year	2016	Description	
Purchase Order		Vendor	
Requisition		Ship To	
Buyer		Approval Group	
Date Issued		Attention	
Date Required		Status	

Find Advanced

Purchase Order	Date	Fiscal Year	Vendor #	Vendor Name	Buyer	Approval Group	Amount	Status	Indicators
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## 12. How much is left on my blanket PO?

- Once inside the PO, scroll to the very bottom of the PO. The balance will be listed.
- NOTE: This is the balance based on all invoices that have been received and paid. If there are any pending orders we have not received invoices for, it is your responsibility to keep track of these orders and deduct them from the balance.
- You can click on the attachments button to see any invoices that have been paid against the PO.

Purchase Order Information - 16000135 - LANSING SD 5.1 119115 - Internet Explorer

**eFinancePLUS**  
a PLUS 360 Application

Purchase Order Information - 16000135 - LANSING SD 5.1 119115

Add Item

Date: 03/11/2016 Period: 5/16

Header Line Item (1 of 1)

**Header Information**

Purchase Order \* 16000135  Continuous  
Requisition 1600189  
Approval Group \* 12 GARDNER, NGF - NON GRANT FUNDED  
Status \* Y - Printed  
Blanket   
Contract   
Confirming   
Vendor \* 10036801   
DBI BUSINESS INTERIORS  
PO BOX 15247  
912 E MICHIGAN AVE  
LANSING MI 48901

Issued 07/09/2015  
Required  
Expires  
Terms NET 30 DAYS  
Freight  
Description  
Buyer CHERYL HICKS  
Attention CONNIE NICKSON  
Ship To \* 012 - GARDNER MIDDLE SCHOOL  
333 DAHLIA  
LANSING MI 48911  
PH:517-755-1120/FAX:517-755-1129  
Encumber \* Y - Post Encumbrance

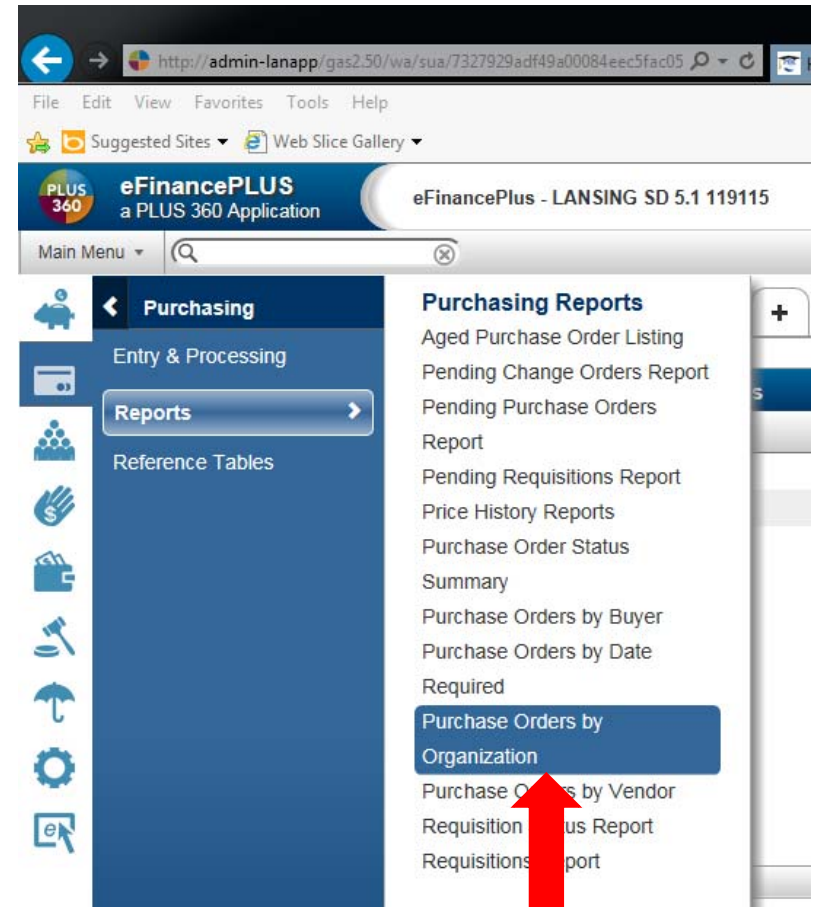
Item	Description	Quantity	Price	Total	ASN	Account	Appr
1	BLANKET PURCHASE ORDER FOR VARIOUS	1.00	2,000.0000	2,000.00	1111200120000000	51100000	X - Pc

1 detail item(s) **Total: 2,000.00 Total Balance: 55.25 Total Payment To Date: 1,944.75**

Version 5.1 LANSING SD 5.1 119115

# 13. How do I run a report to see balances of all PO's?

- **Go to:**
  - Main Menu – Purchasing – Reports – Purchase Orders by Organization



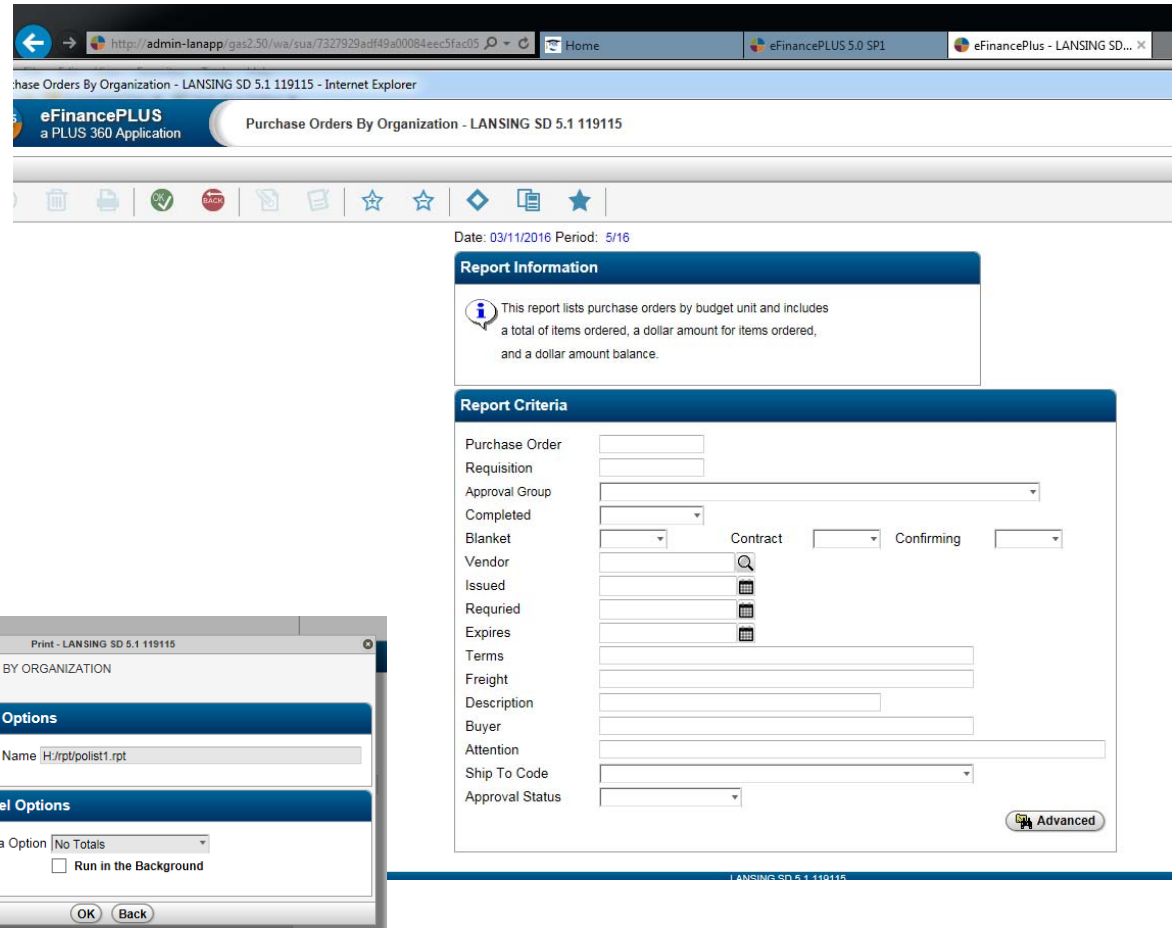
# 13. How do I run a report to see balances of all PO's?

Place all information known (if any), and then click the green "OK" button.

Examples:

- Type "16\*" in the "Purchase Order" box to narrow your search to PO's in this fiscal year.
- Use the magnifying glass to search for a vendor if you only want to see PO's for a specific vendor.

After you click "OK", you can choose to run the report to "Screen" (PDF) or excel. PDF is the recommended version for this report. Click "OK" again to run the report.



# 13. How do I run a report to see balances of all PO's?

This is an example of an open PO with nothing paid against the PO yet. Note the total amount and balance are the same.

SUNGARD K-12  
 DATE: 06/19/2014  
 TIME: 13:33:14

LANSING SCHOOL DISTRICT  
 PURCHASE ORDERS BY ORGANIZATION

PAGE NUMBER: 1  
 PURCHA31  
 ASN TOTALS

SELECTION CRITERIA: ALL

ASN - 1111100110000000 - 111 PATTENGILL

PO NUMBER	# OF CHGS	ASN	VENDOR	ACCOUNT	PROJECT	PO.TYPE	P/A	REQ.REP	DATE	STATUS	CODE	DAYS
14000007	000	1111100110000000	10001001 - EASTERN BOOK CO	51100000		REGULAR	N	1400010	06/19/14	ENTERED		
			BUYER- TERMS- NET 30 DAYS	SHIP CD- PURCH	FREIGHT-					REQUIRE		EXPIRES

ITEM	COMMODITY---	STOCK NUMBER	STATUS	UNIT PRICE	MEASURE	ORDERED	TAX AMOUNT TRADE-IN/DISC	AMOUNT	BALANCE
01			OPEN	24.0000		3.00	.00	72.00	
	BOOKS - FINANCE BOOKS						.00		
02			OPEN	19.0000		3.00	.00	57.00	
	BOOKS - PURCHASING ITEMS						.00		
03			OPEN	20.0000		15.00	.00	300.00	
	BOOKS - LEARN SUNGARD BOO						.00		
						PURCHASE ORDER TOTAL	21.00	429.00	429.00

This is an example of an open PO with partial payments made against the PO. Note the total amount is greater than the balance.

SUNGARD K-12  
 DATE: 06/19/2014  
 TIME: 13:33:14

LANSING SCHOOL DISTRICT  
 PURCHASE ORDERS BY ORGANIZATION

PAGE NUMBER: 4  
 PURCHA31  
 ASN TOTALS

SELECTION CRITERIA: ALL

ASN - 1111100120000000 - 111 GARDNER

PO NUMBER	# OF CHGS	ASN	VENDOR	ACCOUNT	PROJECT	PO.TYPE	P/A	REQ.REP	DATE	STATUS	CODE	DAYS
14000012	000	1111100120000000	10068303 - STAPLES ADVANTA	51100000		REGULAR	N	1400015	06/19/14	ENTERED		
			BUYER- TERMS- NET 30 DAYS	SHIP CD- PURCH	FREIGHT-					REQUIRE		EXPIRES

ITEM	COMMODITY---	STOCK NUMBER	STATUS	UNIT PRICE	MEASURE	ORDERED	TAX AMOUNT TRADE-IN/DISC	AMOUNT	BALANCE
01			OPEN	1.0000		450.00	.00	450.00	
	TEST - BLANKET PO MISC ITEMS, *DISTRIBUTION METHOI: QUANT						.00		
						PURCHASE ORDER TOTAL	450.00	450.00	294.45

If the balance says \$0, the PO has been fully paid and closed.

## 14. Questions?

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