

Requisition Entry *Using Munis*

A How-to Guide

The Requisition Entry program accepts and processes requisitions, which are department purchase requests that precede purchase order issue. With these instructions, the end-user will be able to enter a requisition, add an attachment and review the requisition approvers.

1ST STEP

Open the FWISD homepage > Employees > My FWISD ClassLink Portal or click the Classlink icon on the desktop.



Locate and click on the Munis icon

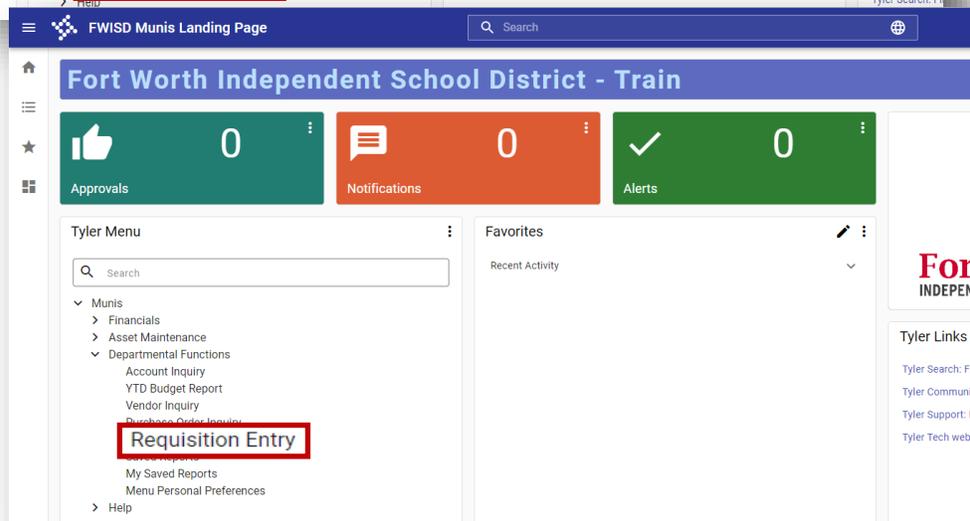
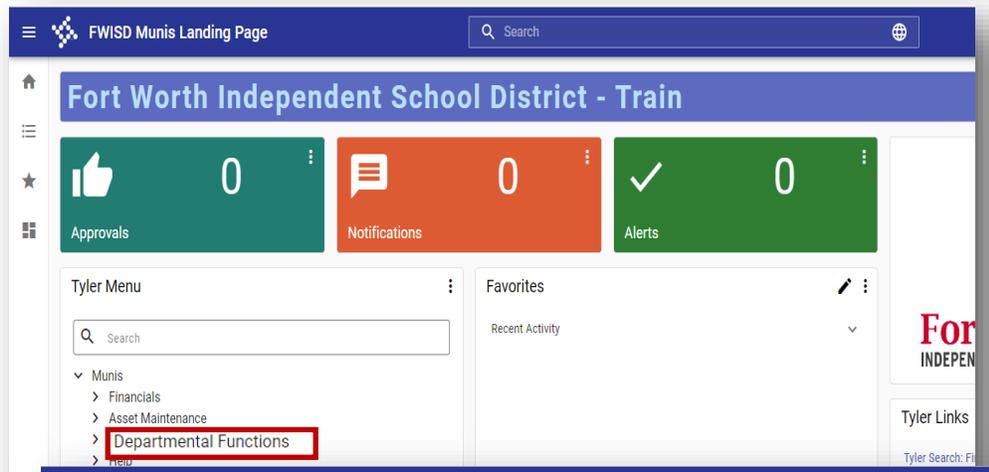


The FWISD Munis Landing Page Opens.

From the Tyler Menu:

Click Departmental Functions

Click Requisition Entry



2ND STEP

The Requisition window opens.

Click Add.

The screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' window. The 'Add' button, represented by a green plus sign, is highlighted with a red box. The window contains various input fields for Main Information, Vendor Information, and Line Items.

3RD STEP

The Location and Fiscal year will automatically populate with the current year.

Press the tab key and the status, requisition number, Entered date and by will automatically populate.

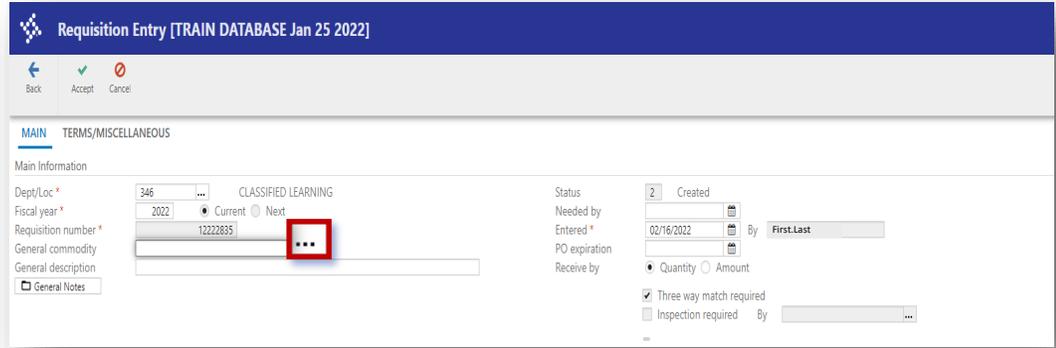
The screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' window with several fields populated. Red arrows point to the following fields: Dept/Loc (346), Fiscal year (2022), Status (2 Created), Requisition number, Entered date (02/16/2022), and Entered by (First.Last).

Remember to press the Tab Button to move from field to field! A few field values are automatically populated depending on info entered in previous fields.

4TH STEP

Press the tab key to reach the General commodity field.

Click on the ellipses  to view a list of the General Commodity codes.



Requisition Entry [TRAIN DATABASE Jan 25 2022]

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 CLASSIFIED LEARNING

Fiscal year * 2022 Current Next

Requisition number * 12222835

General commodity 

General Notes

Status 2 Created

Needed by

Entered * 02/16/2022 By First.Last

PO expiration

Receive by

Quantity Amount

Three way match required

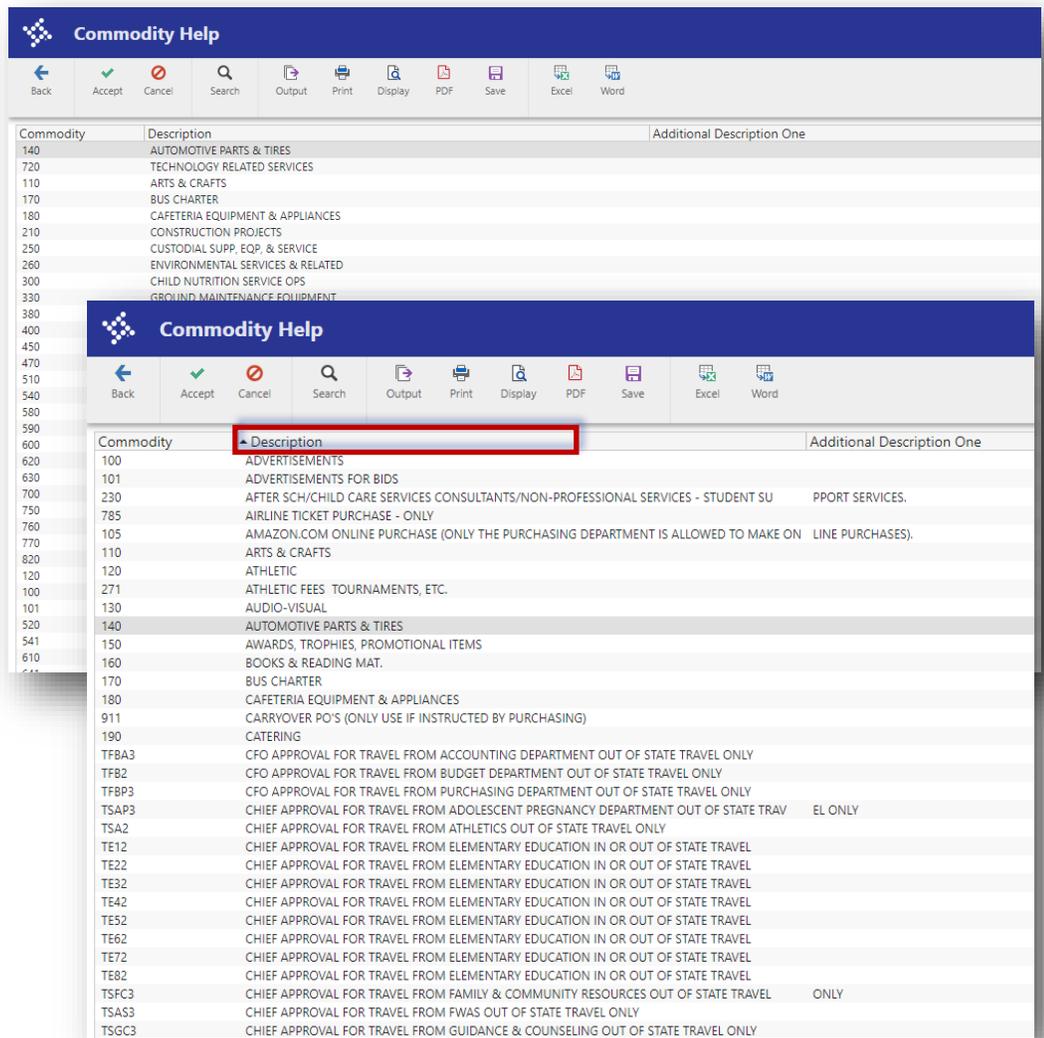
Inspection required By

5TH STEP

The Commodity Help window will open with a list of commodity codes.

To make searching easier, left click on Description at the top of the list and the commodities will be in alphabetical order.

Click Accept or double click the commodity to select it.



Commodity Help

Commodity Description Additional Description One

Commodity	Description	Additional Description One
140	AUTOMOTIVE PARTS & TIRES	
720	TECHNOLOGY RELATED SERVICES	
110	ARTS & CRAFTS	
170	BUS CHARTER	
180	CAFETERIA EQUIPMENT & APPLIANCES	
210	CONSTRUCTION PROJECTS	
250	CUSTODIAL SUPP. EQP. & SERVICE	
260	ENVIRONMENTAL SERVICES & RELATED	
300	CHILD NUTRITION SERVICE OPS	
330	GROUND MAINTENANCE EQUIPMENT	
380		
400		
450		
470		
510		
540		
580		
590		
600		
620	ADVERTISEMENTS	
630	ADVERTISEMENTS FOR BIDS	
700	AFTER SCH/CHILD CARE SERVICES CONSULTANTS/NON-PROFESSIONAL SERVICES - STUDENT SU	PPORT SERVICES.
750	AIRLINE TICKET PURCHASE - ONLY	
760	AMAZON.COM ONLINE PURCHASE (ONLY THE PURCHASING DEPARTMENT IS ALLOWED TO MAKE ON	LINE PURCHASES).
770	ARTS & CRAFTS	
820	ATHLETIC	
120	ATHLETIC FEES TOURNAMENTS, ETC.	
100	271	
101	130	AUDIO-VISUAL
520	140	AUTOMOTIVE PARTS & TIRES
541	150	AWARDS, TROPHIES, PROMOTIONAL ITEMS
610	160	BOOKS & READING MAT.
611	170	BUS CHARTER
	180	CAFETERIA EQUIPMENT & APPLIANCES
	911	CARRYOVER PO'S (ONLY USE IF INSTRUCTED BY PURCHASING)
	190	CATERING
	TFBA3	CFO APPROVAL FOR TRAVEL FROM ACCOUNTING DEPARTMENT OUT OF STATE TRAVEL ONLY
	TFB2	CFO APPROVAL FOR TRAVEL FROM BUDGET DEPARTMENT OUT OF STATE TRAVEL ONLY
	TFBP3	CFO APPROVAL FOR TRAVEL FROM PURCHASING DEPARTMENT OUT OF STATE TRAVEL ONLY
	TSAP3	CHIEF APPROVAL FOR TRAVEL FROM ADOLESCENT PREGNANCY DEPARTMENT OUT OF STATE TRAVEL ONLY
	TSA2	CHIEF APPROVAL FOR TRAVEL FROM ATHLETICS OUT OF STATE TRAVEL ONLY
	TE12	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE22	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE32	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE42	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE52	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE62	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE72	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TE82	CHIEF APPROVAL FOR TRAVEL FROM ELEMENTARY EDUCATION IN OR OUT OF STATE TRAVEL
	TSFC3	CHIEF APPROVAL FOR TRAVEL FROM FAMILY & COMMUNITY RESOURCES OUT OF STATE TRAVEL ONLY
	TSAS3	CHIEF APPROVAL FOR TRAVEL FROM FWAS OUT OF STATE TRAVEL ONLY
	TSGC3	CHIEF APPROVAL FOR TRAVEL FROM GUIDANCE & COUNSELING OUT OF STATE TRAVEL ONLY

6TH STEP

Press the tab key and the General description field will populate.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING

Fiscal year * 2022 Current Next

Requisition number * 12222835

General commodity 280 ... FIELD TRIPS

General description FIELD TRIPS

General Notes

Vendor Information

Vendor 0 ... Committed

Name

PO mailing 0 ...

Status 2 Created

Needed by

Entered * 02/16/2022 By First.Last

PO expiration

Receive by Quantity Amount

Three way match required

Inspection required By

Shipping Information

Ship to * 346 ...

FWISD CLASSIFIED LEARNING

3150 MCCART AVE STE 254

FORT WORTH

Email aracely.chavez@fwisd.org

7TH STEP

Click on the General Notes button.

Enter any needed information in the notes in the text box.

General Notes

Back Accept Cancel Print On PO Import

Note

Requisition 2022 12222835

Date/Time 2022-02-16 09:38 Print on PO.

Created By kim.cummings

This is a 5th grade field trip

8TH STEP

Click on "Print on PO"; this will print the note you wrote on your PO.

Click on Accept.

Click on Back to return to the main page.

Note: the General Notes folder on the screen will now be in color.

General Notes

Back Accept Cancel Print On PO Import

Note

Requisition 2022 12222835

Date/Time 2022-02-16 09:38 Print on PO.

Created By kim.cummings

This is a 5th grade field trip

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING

Fiscal year * 2022 Current Next

Requisition number * 12222835

General commodity 280 ... FIELD TRIPS

General description FIELD TRIPS

General Notes

NOTES ON GENERAL NOTES

199 Fund: For general supplies, do not need to enter General Notes for the requisition.

When using *federal funds*, must enter information on how the purchase will support the CIP goals of the district.

Rentals or Food: Name of the event or reason for the rental, the date of the rental and the associated agenda.

District Card: Enter the name/s of the persons who will be picking up the card.

If there are questions about notes, for reqs using federal funds, contact the Grants Dept. For any other req, contact the Purchasing Dept.

9TH STEP

Click on Quantity or Amount.

This option affects the receiving steps.

Quantity is chosen if receiving by line item quantity.

Amount is chosen if the req will be received by a dollar amount.

This option cannot be changed once the end-user clicks the accept button to accept the requisition. If a change needs to be made, it must be done before clicking the accept button.

The screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' interface. In the 'Shipping Information' section, the 'Quantity' radio button is selected and highlighted with a red box. Other visible fields include 'Dept/Loc' (346), 'Fiscal year' (2022), 'Requisition number' (12222835), and 'General description' (FIELD TRIPS).

10TH STEP

Press the tab key to the Vendor Information.

Munis will automatically populate Needed by, Entered, By and PO expiration date.

The screenshot shows the same 'Requisition Entry' interface. The 'Vendor Information' section is highlighted with a red box. The 'Quantity' option is now selected. The 'Status' section shows 'Needed by' (02/16/2022), 'Entered' (06/20/2022), and 'By' (kim.cummings).

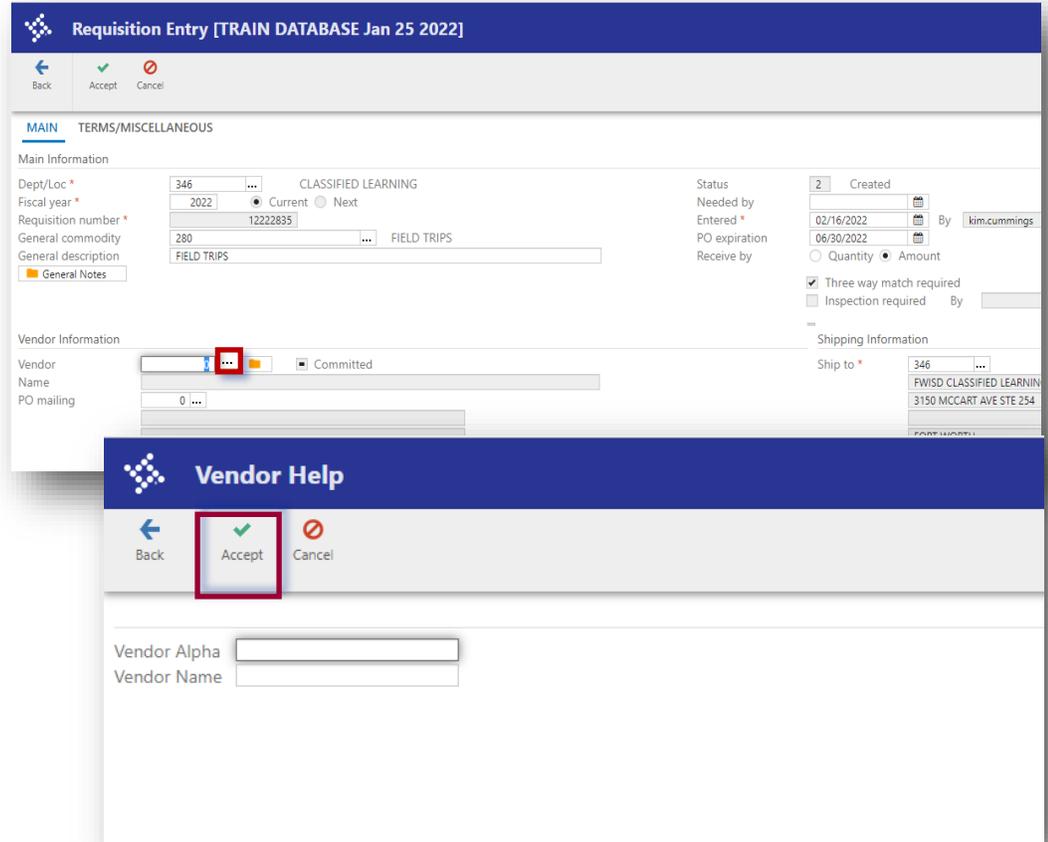
11TH STEP

If you do not already know the vendor number, click on the ellipses. 

The Vendor Help window opens.

Enter the vendor name in ALL CAPS to search in Vendor Alpha or Vendor Name

Click Accept.

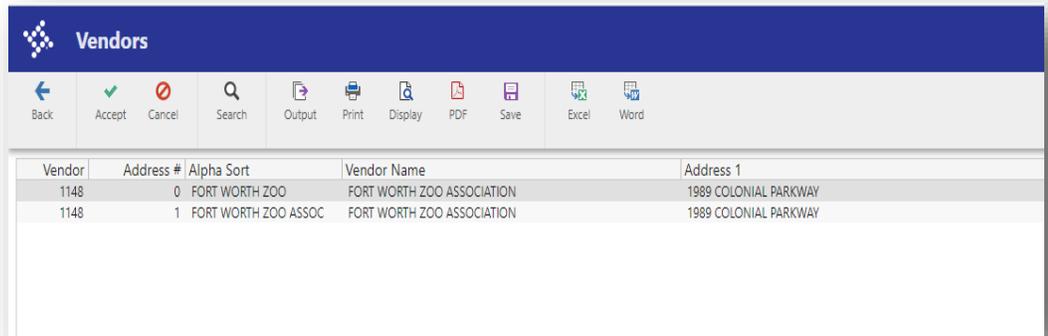


12TH STEP

The Vendors window opens with a list of vendors based on the search criteria entered in Step 11.

Compare the vendor address on the quote to the vendor address displayed. If the address on the quote does not match what is in MUNIS or is not listed, contact Purchasing.

Click Accept or double click the vendor to select it.



13TH STEP

The main requisition screen will display with the Vendor's Name and PO mailing address automatically populated.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING
 Fiscal year * 2022 Current Next
 Requisition number * 12222835
 General commodity 280 ... FIELD TRIPS
 General description FIELD TRIPS
 General Notes

Status
 Needed by
 Entered *
 PO expiration
 Receive by

Vendor Information

Vendor 1148 ... Committed
 Name FORT WORTH ZOO ASSOCIATION
 PO mailing 0 ...
 1989 COLONIAL PARKWAY
 FORT WORTH TX 76110

Delivery method Print Fax E-Mail E-Procurement
 Remit 0 ... FORT WORTH ZOO ASSOCIATION
 Vendor/Sourcing Notes Vendor Quotes (0)

14TH STEP

Press the tab key to reach the Ship to and Email fields.

These fields will automatically populate while completing the form.

The email should match the user entering the requisition. In the Reference field, enter the email address of contact person for the purchase. This provides the warehouse a contact email address if there is a question about the warehouse order.

To update the Ship to location, click in the field and enter the dept /loc number where the order should be delivered.

Note: If the "Ship To" address and/or email needs to be updated, contact the Purchasing Dept.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING
 Fiscal year * 2022 Current Next
 Requisition number * 12222835
 General commodity 280 ... FIELD TRIPS
 General description FIELD TRIPS
 General Notes

Status 2 Created
 Needed by
 Entered * 02/16/2022 By FirstLast
 PO expiration 06/30/2022
 Receive by
 Quantity Amount
 Three way match required
 Inspection required By

Vendor Information

Vendor 1148 ... Committed
 Name FORT WORTH ZOO ASSOCIATION
 PO mailing 0 ...
 1989 COLONIAL PARKWAY
 FORT WORTH TX 76110

Delivery method Print Fax E-Mail E-Procurement
 Remit 1 ... FORT WORTH ZOO ASSOCIATION
 Vendor/Sourcing Notes Vendor Quotes (0)

Shipping Information

Ship to * 346 ...
 FWISD CLASSIFIED LEARNING
 3150 MCCART AVE STE 254
 FORT WORTH TX 76110

Email aracely.chavez@fwisd.org

Reference ENTER REFERENCE EMAIL HERE

15TH STEP

Click Accept.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back **Accept** Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING
 Fiscal year * 2022 Current Next
 Requisition number * 12222835
 General commodity 280 ... FIELD TRIPS
 General description FIELD TRIPS

Status 2 Created
 Needed by
 Entered * 02/16/2022 By First.Last
 PO expiration 06/30/2022
 Receive by
 Quantity Amount
 Three way match required
 Inspection required By ...

Vendor Information

Vendor 1148 ... Committed
 Name FORT WORTH ZOO ASSOCIATION
 PO mailing 0 ...
 1989 COLONIAL PARKWAY
 FORT WORTH TX 76110
 Delivery method Print Fax E-Mail E-Procurement
 Remit 1 ... FORT WORTH ZOO ASSOCIATION

Shipping Information

Ship to * 346 ...
 FWISD CLASSIFIED LEARNING
 3150 MCCART AVE STE 254
 FORT WORTH TX 76110
 Email aracely.chavez@fwisd.org
 Reference REFERENCE EMAIL HERE

16TH STEP

The Line Items window opens.

Click Add

Line Items

Back Search Browse **Add** Edit Delete Copy Mass Allocate Shop Online

Requisition
 Fiscal year Number Line

Detail

Quantity *
 Commodity
 Inventory item
 Location
 Type Pick ticket Purchase
 Description *

Unit price
 UOM *
 Freight
 Discount percent
 Credit
 Line item total
 Amount justification: UNKNOWN

Miscellaneous

Manufacturer
 Manufacturer item no.
 Vendor
 Bid
 Dept/Loc
 Required by

17TH STEP

Enter the Quantity of items.

Press the tab key to the Description field.

Enter the Item Description.

Press the tab key to the Unit price field.

Enter the cost for the item.

Press the tab key to freight field.

Enter shipping/freight charge if included on the quote.

Line Items

Back Accept Cancel

Requisition
Fiscal year: 2022 Number: 12222837 Line: 1

Detail
Quantity: 1.00
Commodity: ...
Inventory item: ...
Location: ...
Type: Pick ticket Purchase
Description: Field Trip to Fort Worth Zoo for 25 students.
Miscellaneous
Manufacturer: ...
Manufacturer item no.: 1148
Vendor: FORT WORTH ZOO ASSOCIATION
PO mailing: 0
Delivery method: Print Fax E-Mail E-Procurement
Remit: FORT WORTH ZOO ASSOCIATION
Bid: 348
Dept/Loc: CLASSIFIED LEARNING
Required by: ...
Requested by: ...
Receipt notification to: ...
Capital asset: N
WO number: 0
WO task: ...
Unit price: 250.00000
UOM: EACH
Freight: .00
Discount percent: .00
Credit: .00
Line item total: 250.00
Amount justification: UNKNOWN

18TH STEP

Press the tab key to Budget line

Manufacturer Item No., Delivery Method and Dept/Loc will populate.

Expense will be set to T and the area to enter the account number will be highlighted in blue.

If the columns at the bottom of the requisition screen do not match the print screen, enter a ticket to Business Systems to have this updated.

Line Items

Back Accept Cancel Search Delete Copy GL Acct Budget

Fiscal year: 2022 Number: 12222837 Line: 1

Detail
Quantity: 1.00
Commodity: ...
Inventory item: ...
Location: ...
Type: Pick ticket Purchase
Description: Field Trip to Fort Worth Zoo for 25 students.
Miscellaneous
Manufacturer: ...
Manufacturer item no.: 1148
Vendor: FORT WORTH ZOO ASSOCIATION
PO mailing: 0
Delivery method: Print Fax E-Mail E-Procurement
Remit: FORT WORTH ZOO ASSOCIATION
Bid: 348
Dept/Loc: CLASSIFIED LEARNING
Required by: ...
Requested by: ...
Receipt notification to: ...
Capital asset: N
WO number: 0
WO task: ...
Unit price: 250.00000
UOM: EACH
Freight: .00
Discount percent: .00
Credit: .00
Line item total: 250.00
Amount justification: UNKNOWN

Seq	T	Account	Description	Amount	GL Bud
01	Expense	-	TRAVEL - STUDENT	250.00	
					.00

19TH STEP

Type in the account number.

Optional:

Creating multiple lines using the same budget.:

Enter the GL account on line 1 of the requisition.

Click Accept.

Click Add to enter Line Item 2.

Once Item information has been entered, tab to the Account field and select "Copy GL" Account icon.

This will copy the GL account from line 1 to line 2.

Click Accept after the account populates.

Splitting the cost of an item over multiple GL accounts?

If multiple GL accounts are used for one line, enter the amount for the first line.

Munis will automatically copy the GL Account. Click on the budget code to type in a new one.

Seq	T	Account	Description	Amount	GL Bud
01	Expense	199-11-6412-001-001-11-144-000000-	TRAVEL - STUDENT	200.00	
02	Expense	199-11-6412-001-001-22-221-000000-	TRAVEL - STUDENT	50.00	

20TH STEP

Once all line items have been entered with the appropriate GL account, click Accept and Back

Line Items

Back **Accept** Cancel

Requisition
Fiscal year: 2022 Number: 12222837 Line: 1

Detail
Quantity: 1.00
Commodity: ...
Inventory item: ...
Location: ...
Type: Pick ticket Purchase
Description: Field Trip to Fort Worth Zoo for 25 students.
Miscellaneous
Manufacturer: ...
Manufacturer item no.: ...
Vendor: 1148 FORT WORTH ZOO ASSOCIATION
PO mailing: 0
Delivery method: Print Fax E-Mail E-Procurement
Remit: 1 FORT WORTH ZOO ASSOCIATION
Vendor item no.: 1099 box

Seq	T	Account	Description	Amount	GL Bud
01	Expense	199-11-6412-001-001-11-144-000000-	TRAVEL - STUDENT	250.00	U

Informational:

When All information has been entered and the GL accounts assigned, the the status will now show as (4) Allocated.

Note: All lines must have a GL Account assigned even if the price is \$0.00

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyForms Delivery Definitions Email Schedule Attach Switch Form Line Items Release Activate Mass Allocate Note

MAIN TERMS/MISCELLANEOUS

Main Information
Dept/Loc: 346 CLASSIFIED LEARNING
Fiscal year: 2022 Current Next
Requisition number: 12222837
General commodity: 280 FIELD TRIPS
General description: FIELD TRIPS
Status: 4 Allocated
Entered: 02/16/2022 By: First.Last
PO expiration: 06/30/2022
Quantity: Amount
 Three way match required
 Inspection required By: ...

Vendor Information
Vendor: 1148 FORT WORTH ZOO ASSOCIATION
Name: FORT WORTH ZOO ASSOCIATION
PO mailing: 0
1989 COLONIAL PARKWAY
FORT WORTH TX 76110
Delivery method: Print Fax E-Mail E-Procurement
Remit: 1 FORT WORTH ZOO ASSOCIATION
Vendor/Sourcing Notes: Vendor Quotes (0)

Shipping Information
Ship to: 346
FWISD CLASSIFIED LEARNING
3150 MCCART AVE STE 254
FORT WORTH TX 76110
Email: aracely.chavez@fwisd.org
Reference: REFERENCE EMAIL NAME

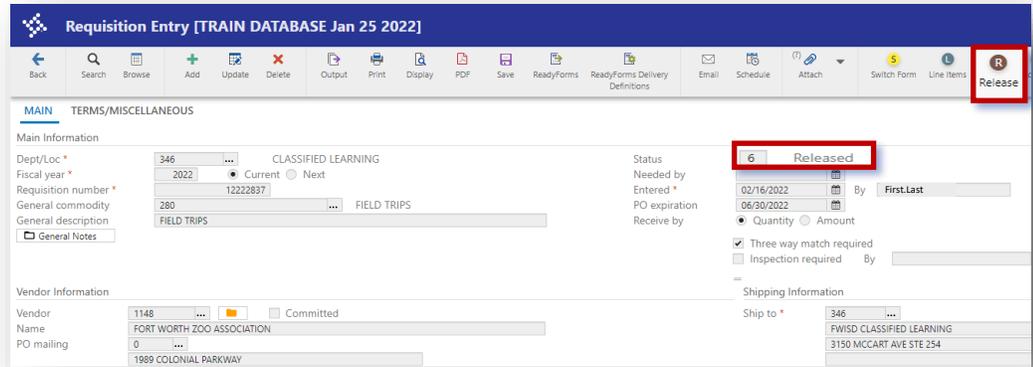
Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor	Qty
1					Field Trip to Fort Worth Zoo for 25 students.	(1148) FORT WORTH ZOO ASSOCIATION	1.00

21ST STEP

Review the information and add attachments before releasing the requisition.

Click on Release

The Status will update from (4) Allocated to (6) Released.

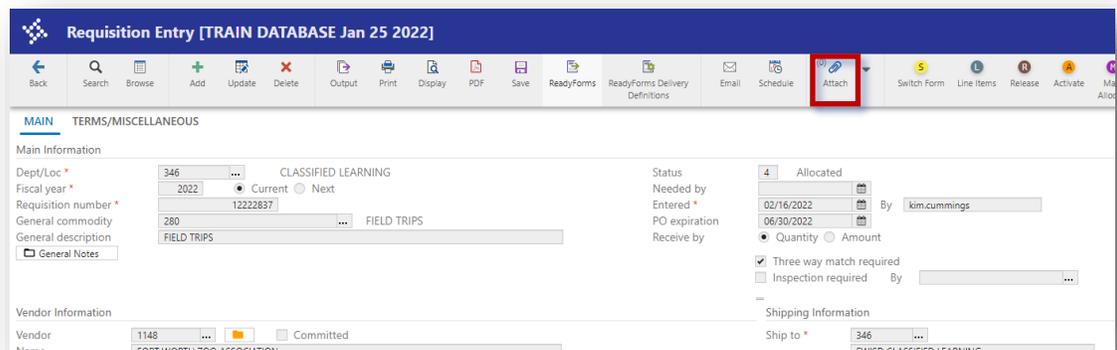


ATTACH DOCUMENTS TO YOUR REQUISITION

1ST STEP

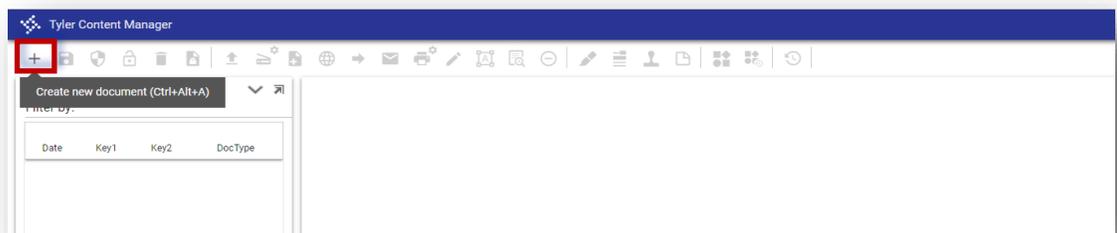
Attachments need to be added to the requisitions. These should be saved before this step.

Add an attachment by clicking on Attach.



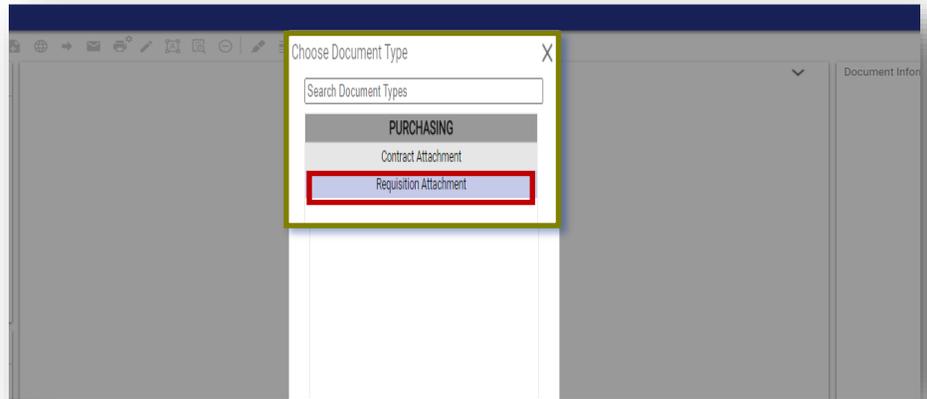
2ND STEP

When the TCM screen opens, click + to attach a new document.



3RD STEP

Click Requisition Attachment



4TH STEP

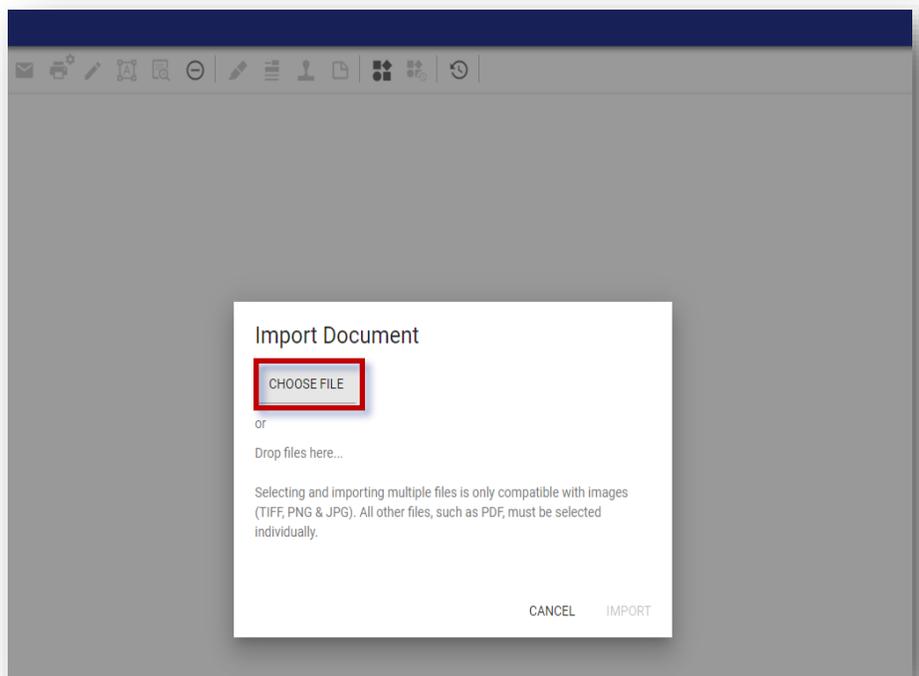
Click on the  arrow to import the attachment.



5TH STEP

The Import Document window opens.

Click Choose File.

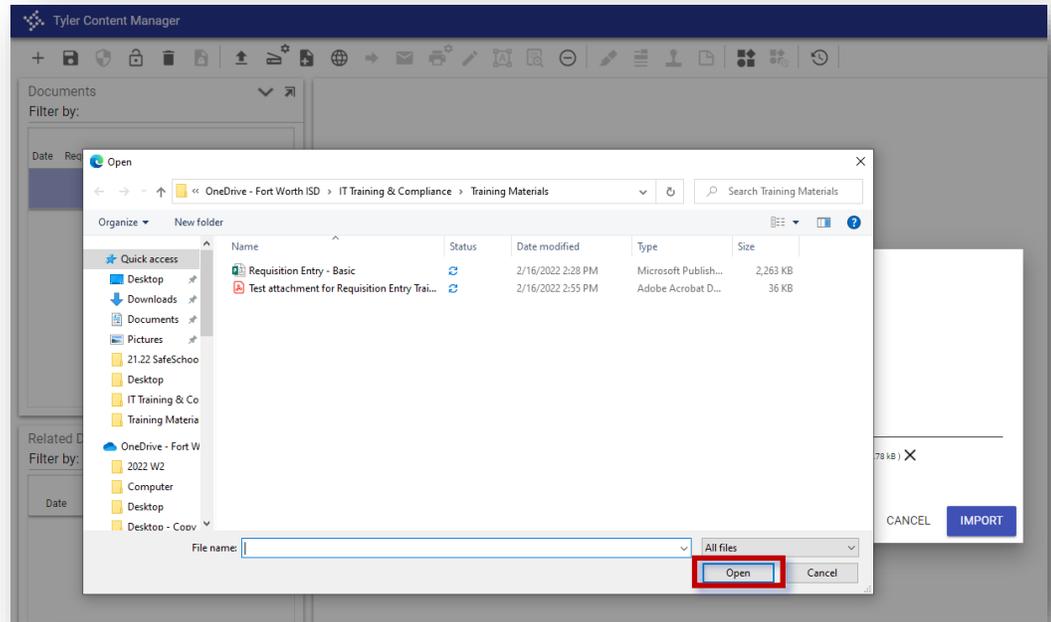


6TH STEP

The File Explorer window opens.

Locate and click on the file.

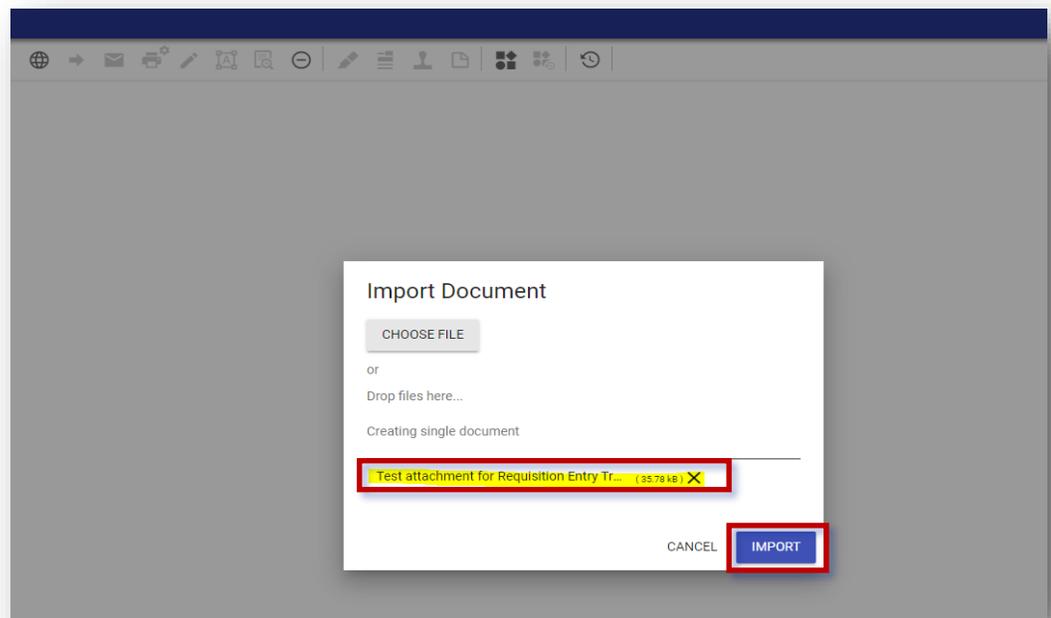
Click Open.



7TH STEP

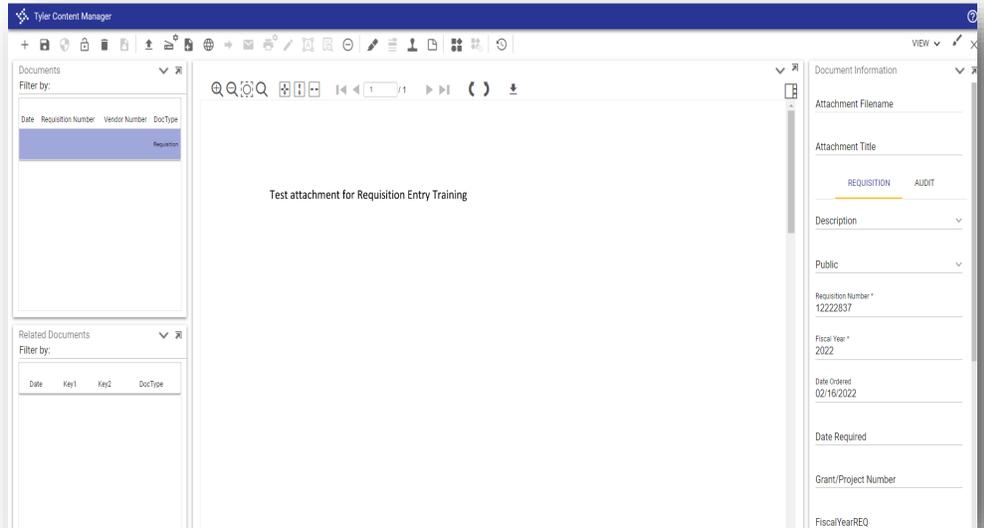
The uploaded filename will display in the Import Document window underneath the line.

Click Import.



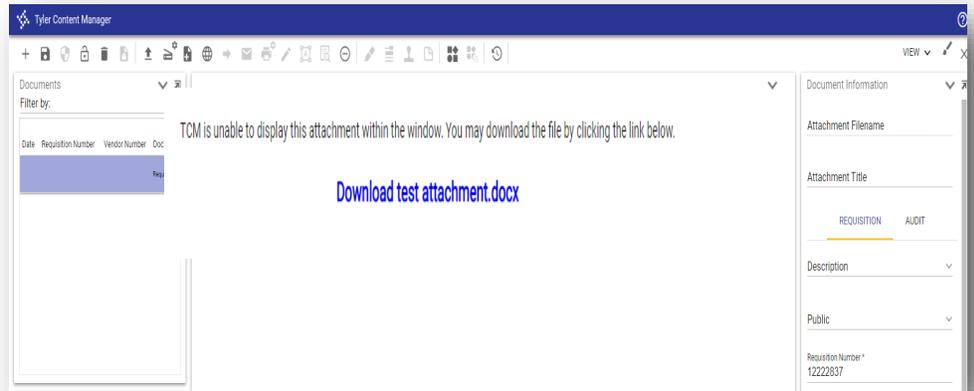
8TH STEP

A PDF file displays with the items or quote information.



A WORD document or EXCEL spreadsheet file name displays in the center of the page.

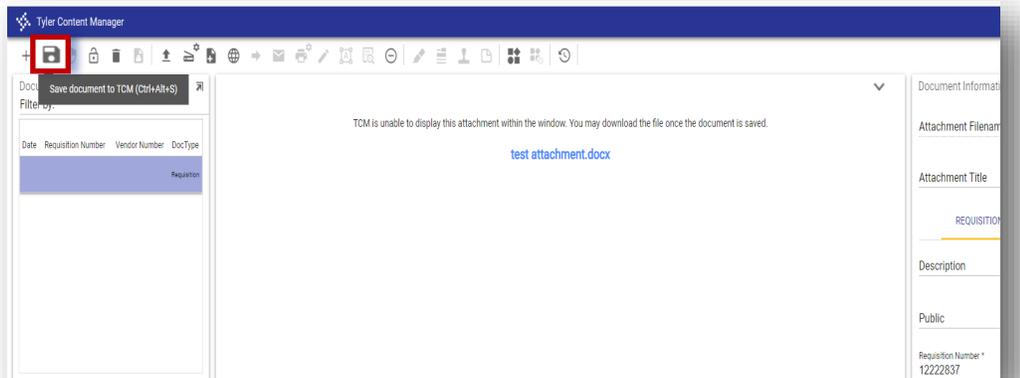
In order to view the file, click the download link in the middle of the window.



9TH STEP

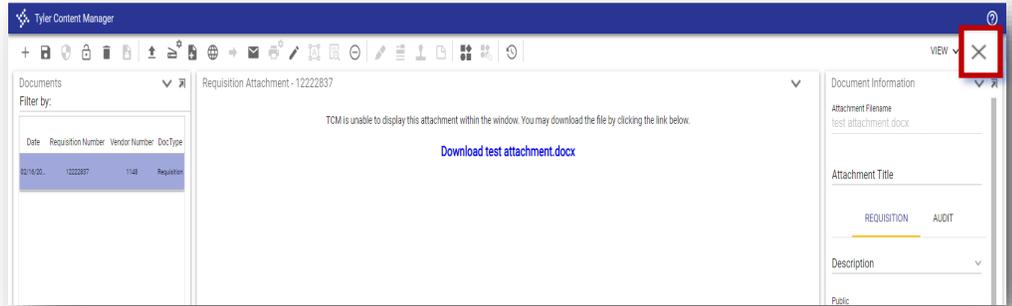
Click on the Save button.

Be sure to click on the Save button or the document will not attach!



10TH STEP

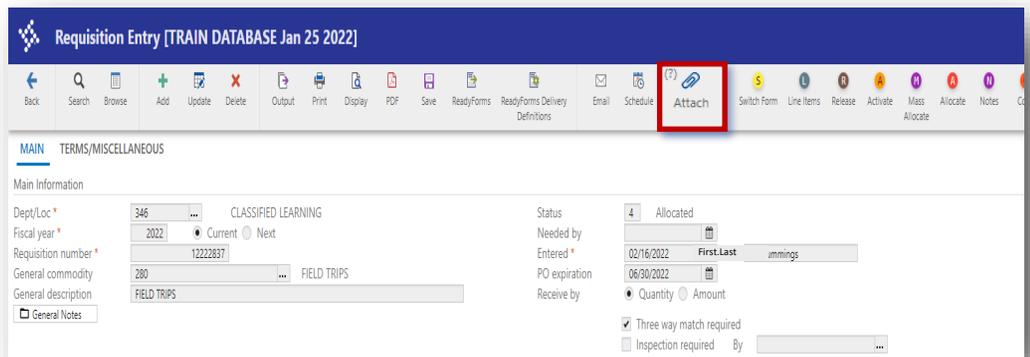
Click the X in the right corner to close the TCM viewer.



Informational:

The number of attachments will display next to the paperclip.

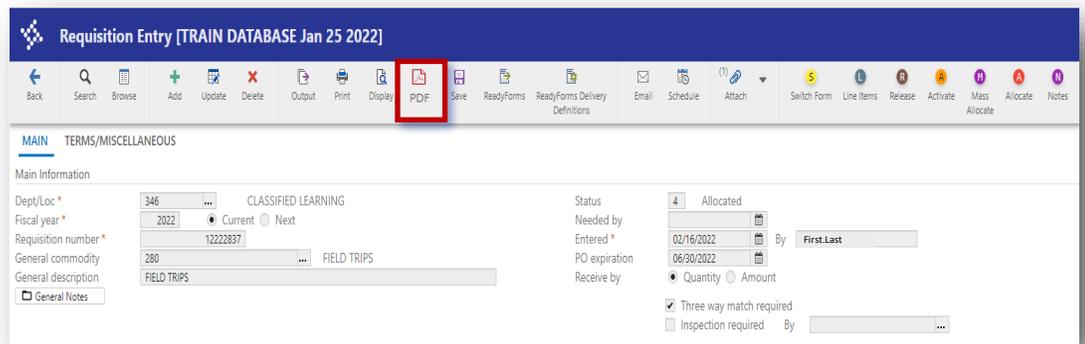
If the number is a question mark, don't worry, it still recognizes that there is an attachment.



PRINT REQUISITION—OPTIONAL

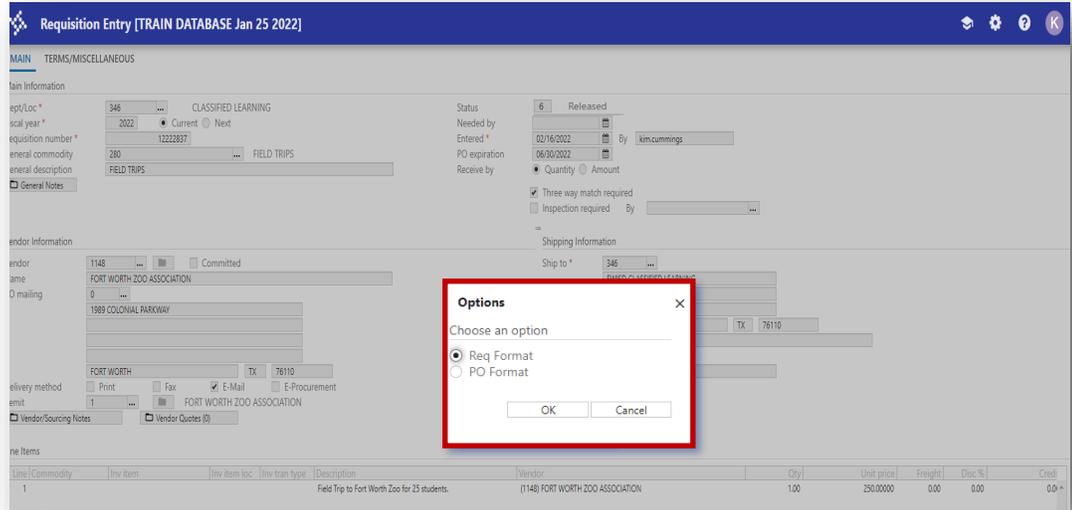
1ST STEP

Click on PDF.



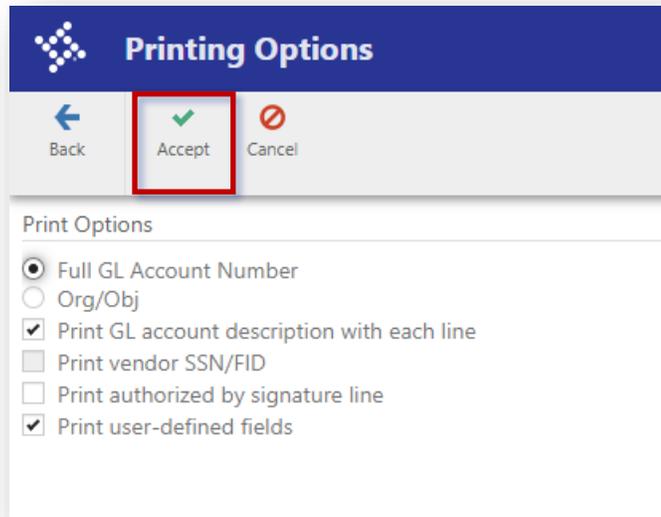
2ND STEP

The Options window opens.
Choose Req Format
Click OK.



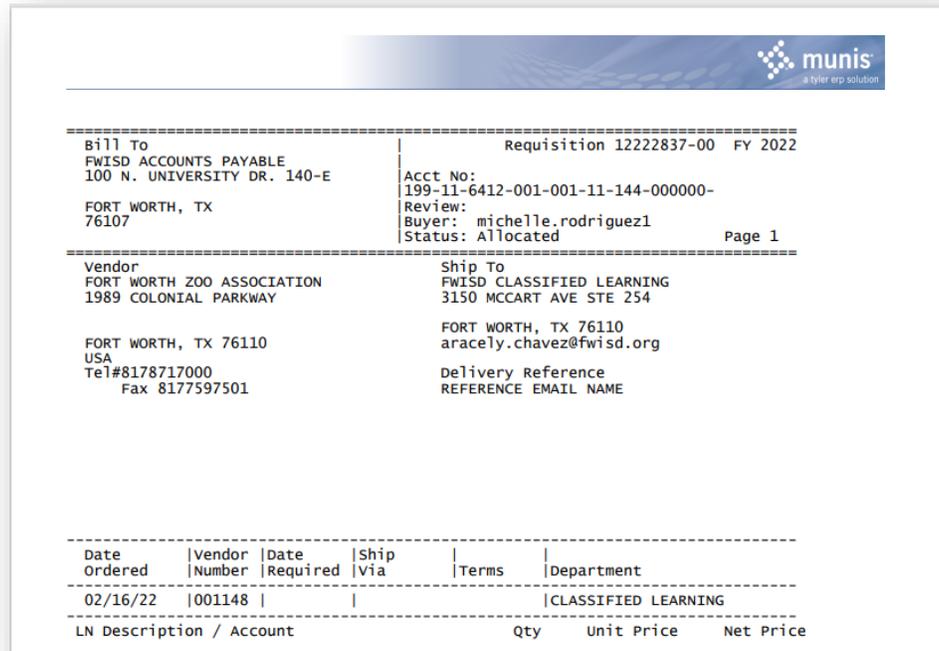
3RD STEP

The Printing Options window opens.
Click Accept



The PDF will open in another tab and can be saved.

DO NOT SEND PDF COPY TO THE VENDOR AS THIS IS NOT A PO.



POP-UP BLOCKED

If the PDF does not open on the screen or it does not show ready to open in the upper right corner, the pdf has been blocked.

This can be seen by the icon at the end of the address bar.

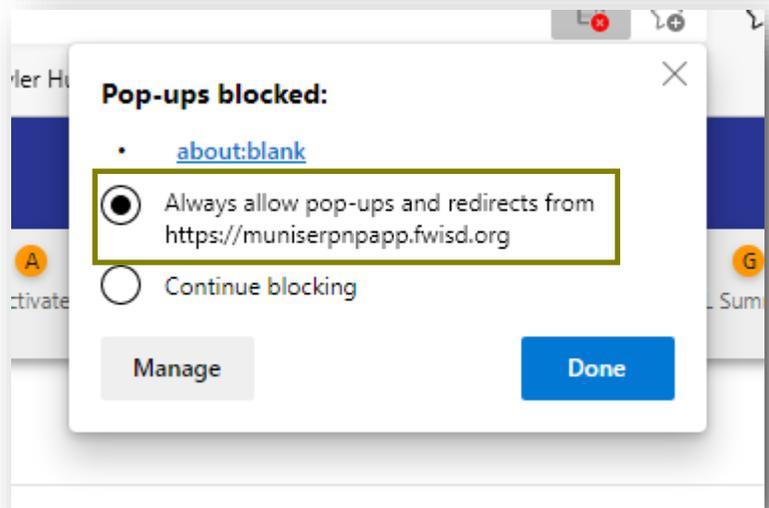
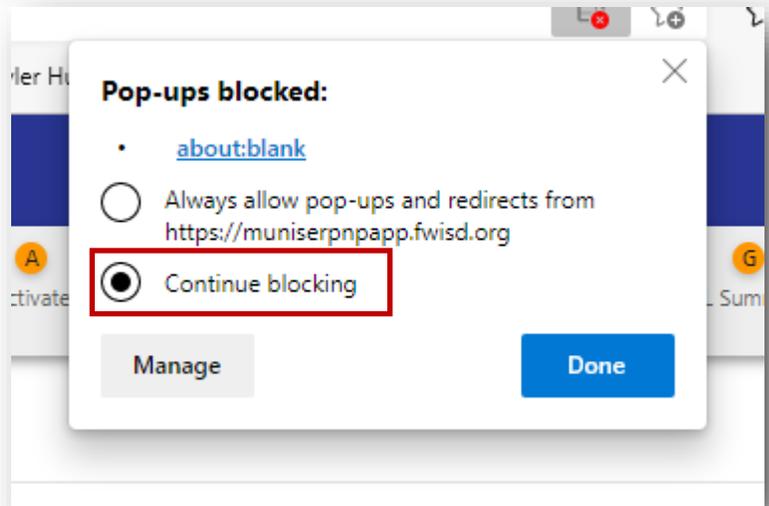
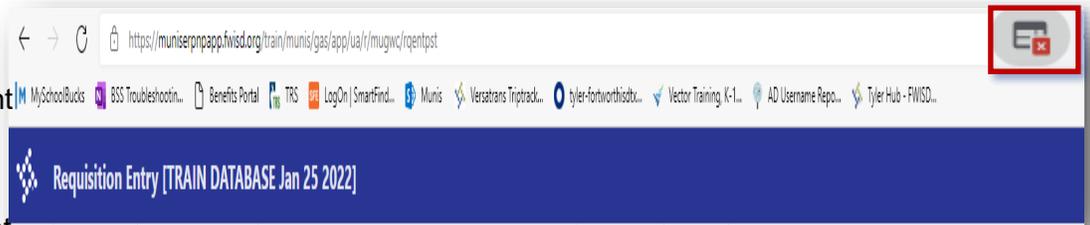
Click on this icon to update the settings to allow for pop-ups.



The default setting for pop-ups is set to Continue blocking.

Click to Always allow pop-ups and redirects from <https://muniserpnapp.fwisd.org>

Click Done



LOOK UP THE APPROVERS FOR THE REQUISITION

1ST STEP

Click on Approvers.

The Work Flow Status window opens.

The screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' window. The interface includes a top navigation bar with icons for Back, Search, Browse, Add, Update, Output, Print, Display, PDF, Save, ReadyForms, ReadyForms Delivery Definitions, Email, and Schedule. The main content area is divided into several sections:

- Main Information:** Includes fields for Dept/Loc (346), Fiscal year (2022), Requisition number (12214456), General commodity (720), and General description (SAFESCHOOLS LICENSE FOR CTE STUDENTS).
- Vendor Information:** Includes Vendor (20252), Name (VECTOR SOLUTIONS), PO mailing (0), and Delivery method (Print).
- Line Items:** A table with columns for Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, and Vendor. One line item is visible with Description 'EMPLOYEE SAFETY AND COMPLIANCE LIBRARY - SST FOR ST'.
- Total amount:** 3010.00
- Workflow:** A row of buttons including My Approvals, Approve, Reject, Forward, Hold, and Approvers. The 'Approvers' button is highlighted with a red rectangular box.

2ND STEP

Click Expand All.

A list of approvers will display.

There are reqs that will have multiple approval levels as in the example.

When the status is Group "Complete" to the right of the approver's name, that is an indication the approver has approved the req.

When the status displays "In Progress", the requisition is in that approver's queue.

Click on Back to close out of the Approvers window.

You are done!

Work Flow Status

Back Search

Approvers' comments

Name	Action taken date	Action taken time	Action	Comment
ARACELY CHAVEZ	11/03/2021	09:24	Approved	CTE request after board approval

Steps

Step	Status	Activated Date	Activated
10	Complete (Approved)		
Any approver from this group	Group Complete		
ARACELY CHAVEZ	Complete	11/03/2021	09:24
20	In Progress		
Any approver from this group	Group Current		
April Harrison		11/03/2021	09:47
Lizbeth Medina		11/03/2021	09:47

Generate Chart Expand All Collapse All Expand In Progress

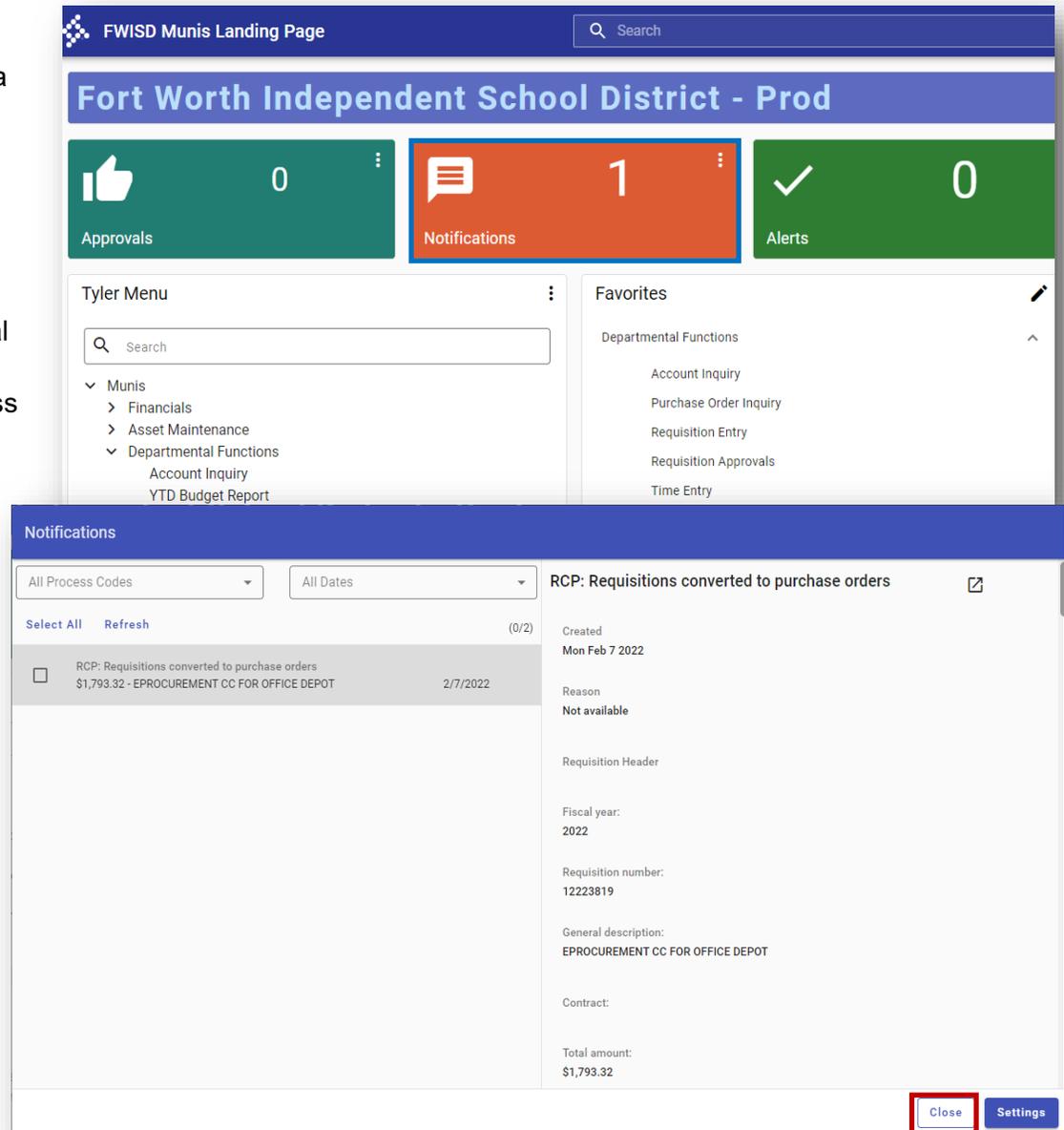
NOTIFICATIONS

After a requisition has been through the approval process, a Notification will be sent that it has been converted to a Purchase Order.

This is only a notification and does not require any action.

However, It would be beneficial to review the notifications for rejected requisitions and dismiss notifications of reqs that have been processed.

Close can be selected at the bottom of the screen.



The screenshot shows the FWISD Munis Landing Page. At the top, there is a search bar and the page title "Fort Worth Independent School District - Prod". Below this, there are three main status indicators: Approvals (0), Notifications (1), and Alerts (0). The Notifications indicator is highlighted in red. Below these indicators, there is a "Tyler Menu" with a search bar and a list of menu items: Munis, Financials, Asset Maintenance, Departmental Functions, Account Inquiry, and YTD Budget Report. To the right of the Tyler Menu is a "Favorites" section with a list of departmental functions: Account Inquiry, Purchase Order Inquiry, Requisition Entry, Requisition Approvals, and Time Entry.

The "Notifications" window is open, showing a list of notifications. The notification is titled "RCP: Requisitions converted to purchase orders" and was created on "Mon Feb 7 2022". The reason is "Not available". The notification details include: Requisition Header, Fiscal year: 2022, Requisition number: 12223819, General description: EPROCUREMENT CC FOR OFFICE DEPOT, Contract, and Total amount: \$1,793.32. At the bottom of the notification window, there are "Close" and "Settings" buttons. The "Close" button is highlighted with a red box.

The option to Dismiss the notification is available by clicking on the checkbox to the left of the requisition information.

Click Dismiss at the bottom of the screen.

The Dismiss item comment screen opens. A comment is not required.

Click Submit.

The screen will automatically refresh.

Click Close

Notifications

All Process Codes All Dates

Select All Refresh (1)

<input checked="" type="checkbox"/>	RCP: Requisitions converted to purchase orders \$1,793.32 - EPROCUREMENT CC FOR OFFICE DEPOT	2/7/2022
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Dismiss

Dismiss 1 Item(s)

Comment

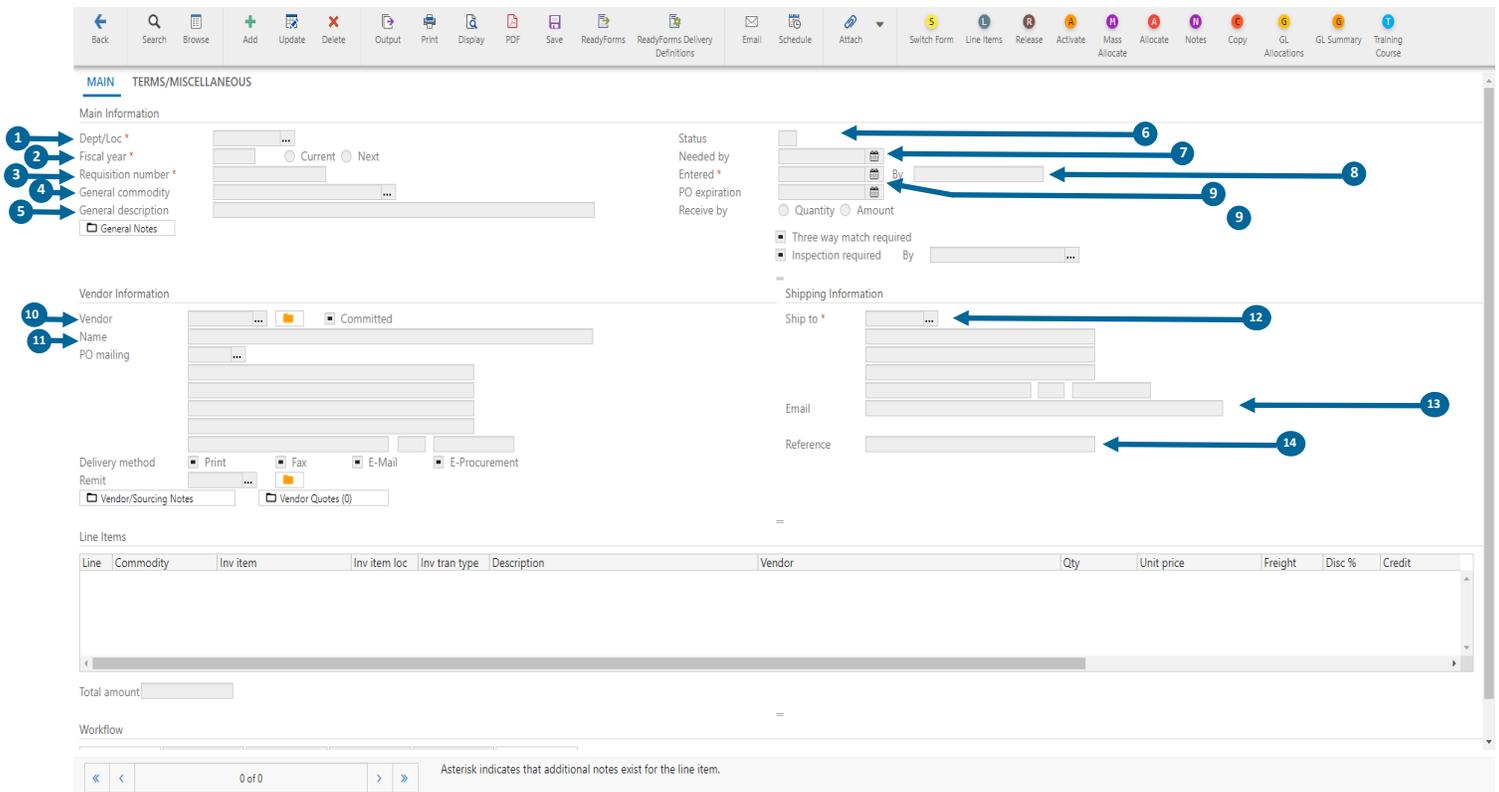
Notifications

All Process Codes All Dates

Select All Refresh (0/0)

No Items to Display

Close



The screenshot shows the 'Requisition Entry' interface. At the top is a navigation bar with icons for Back, Search, Browse, Add, Update, Delete, Output, Print, Display, PDF, Save, ReadyForms, ReadyForms Delivery Definitions, Email, Schedule, Attach, Switch Form, Line Items, Release, Activate, Mass Allocate, Allocate, Notes, Copy, GL Allocations, GL Summary, and Training Course. Below this is the 'MAIN TERMS/MISCELLANEOUS' section. The 'Main Information' section includes fields for Dept/Loc (1), Fiscal year (2), Requisition number (3), General commodity (4), and General description (5). There are also radio buttons for 'Current' and 'Next' fiscal year. The 'Status' section includes 'Status' (6), 'Needed by' (7), 'Entered' (8), and 'By' (9). There are also radio buttons for 'Quantity' and 'Amount', and checkboxes for 'Three way match required' and 'Inspection required'. The 'Vendor Information' section includes 'Vendor' (10), 'Name' (11), and 'PO mailing'. The 'Shipping Information' section includes 'Ship to' (12), 'Email' (13), and 'Reference' (14). Below this is the 'Line Items' section with a table with columns: Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, Vendor, Qty, Unit price, Freight, Disc %, and Credit. At the bottom, there is a 'Workflow' section with a progress bar and a note: 'Asterisk indicates that additional notes exist for the line item.'

GLOSSARY

Main Information Section

- 1 **Dept/Loc** – A general grouping category assigned to each employee, it is assigned based on work department/location.
- 2 **Fiscal year*** – An organization’s financial year. A fiscal year may or may not coincide with the calendar year.
- 3 **Requisition Number*** – A number automatically assigned for the requisition.
- 4 **General commodity** – A code that gives a general description; it standardizes information regarding purchased items.
- 5 **General description*** – A short description of the commodity, it will automatically populate based on the general commodity.
- 6 **Status*** – The value that explains where you are in the requisition process, it ranges from Converted (0) to Approved (8).
 - 2 - Created: Requisition is in the creation process.
 - 4 - Allocated: Budget number has been entered and accepted.
 - 6 - Released: Requisition is released - still in the queue of the budget owner, i.e., principal or director.
 - 8 - Approved: Requisition has been approved by supervisor and pending Purchasing for final approval and PO creation.
 - 0 - Converted: The requisition has been converted into a PO. 1 - Rejected: Requisition has been rejected, check notes for corrections.
- 7 **Needed by** – A date set for when the requisition needs to be completed. This field is not required. It is for rush items, but not necessarily honored, it is a suggested field for the vendor.
- 8 **Entered*** – The date that the requisition is created.
- 9 **By*** – The user creating the requisition.

Vendor Information Section

- 10 **Vendor** – A person or company with whom business is transacted.
- 11 **Name*** – The vendor’s name; will automatically populate when pressing the tab button after entering the vendor number.
- 12 **Ship to*** – The department/location connected to the username entering the requisition.
- 13 **Email*** – The email of the person submitting the requisition.
- 14 **Reference** – The email address of the person who can answer questions regarding the purchase.