



Requisition Entry Using 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

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2_{ND} STEP

The Requisition window opens.

Click Add.

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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.

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



4тн STEP

Press the tab key to reach the General commodity field.

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

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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.

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6TH STEP

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

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7TH STEP

Click on the General Notes button.

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





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.

9тн 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.

10тн **STEP**

Press the tab key to the Vendor Information.

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

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11тн **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.



12тн **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.

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13TH STEP

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

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.

15 Requisition Entry [TRAIN DATABASE Jan 25 2022]

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Vendor	1148 Committed	
Name	FORT WORTH ZOO ASSOCIATION	
PO mailing	0	
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Delivery method	Print Fax E-Mail E-Procurement	
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	1989 COLONIAL PARKWAY		3150 MCCART AVE STE 254
	FORT WORTH TX 76110		FORT WORTH TX 76110
Delivery method Remit	Print Fax E-Mail E-Procurement	Email	aracely.chavez@fwisd.org
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15TH STEP	Requisition Entry [TRAIN DATABASE Jan 25 2022]	
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	🐇 Line Items	
16TH STEP	Copy Mass Shop Online Add Add	
The Line Items window	Requisition	
opens.	Fiscal year Number Line	
-	Detail	
Click Add	Quantity * Commodity Inventory item Location Type Pick ticket Purchase	Unit price UOM *
	Description *	Line item total Amount justification: UNKNOWN
	Add1 Desc/Notes	
	Miscellaneous	
	Manufacturer Manufacturer item no. Vendor	Bid Dept/Loc Required by



17тн **STEP**

Enter the Quantity of items.

A com

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.

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18тн **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.

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19тн **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.

Line Items Q, ← ~ 0 × G 8 Copy GL Acct Budget Searc Delete Accept Requisit Fiscal year 2022 12222837 Line 1 Number Detail Quantity * 1.00 Unit price ... Commodity UOM * EACH ... Inventory item Freight ... Discount percent Location Pick ticket Type Purchase Credit Line item total Description * Field Trip to Fort Worth Zoo for 25 students Amount justification: Add'l Desc/Notes Miscellaneous Manufacturer Bid Manufacturer item no. Dept/Loc 1148 ... Vendor FORT WORTH ZOO ASSOCIATION Required by PO mailing 0 ... 1989 COLONIAL PARKWAY Requested by Print Delivery method Receipt notification to FORT WORTH Fax TX N -Capital asset 76110 E-Mail WO number E-Procurement WO task FORT WORTH ZOO ASSOCIATIO Remit Notify buyer 1 ... D Vendor/Sourcing Notes Vendor item no. 1099 box Amount GL Bud Seq T Description 01 Expense 199-11-6412-001-001-11-144-000000 TRAVEL - STUDENT 250.00 .00

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.

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20TH STEP

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

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

> Delivery method D Vendor/Sourcing No Line Item

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Inv item loc Inv tran type Description Field Trip to Fort Worth Zoo for 25 students

Vendo

(1148) FORT WORTH ZOO ASSOCIATION



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.

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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.

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2ND STEP

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

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3RD STEP

Click Requisition Attachment



4TH STEP

Click on the \pm 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.

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7TH STEP

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

Click Import.

Import Document
CHOOSE FILE
or
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CANCEL



8TH STEP

A PDF file displays with the items or quote information.

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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 <u>not_attach!</u>

X. Tyler Content Manager		
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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.

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PRINT REQUISITION—OPTIONAL

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1st STEP

Click on PDF.



2ND STEP

The Options window opens. Choose Req Format Click OK.

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3RD **STEP**

The Printing Options window opens.

Click Accept

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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.

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FORT WORTH, TX 76107	Review: Review: Buyer: michelle.rodriguez1 Status: Allocated Page 1
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LOOK UP THE APPROVERS FOR THE REQUISITION

1st STEP

Click on Approvers.

The Work Flow Status window opens.

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2ND STEP	۰	Work Flow Sta	tus				
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A list of approvers will display There are reqs that will have multiple approval levels as in the example.	Approver Name ARACELY	rs' comments CHAVEZ	Action taken da 11/03/2021	a Action tak 09:24	Action Approved	Comm CTE rec	ent juest after board appro
When the status is Group "Complete" to the right of the approver's name, that is an indication the approver has approved the req.	Steps Step 10 An	ay approver from this group ARACELY CHAVEZ	Status Complete (Approv Group Complete Complete	/ed)	Activated	d Date 21	Activated
Vinen the status displays in Progress", the requisition is in that approver's queue. Click on Back to close out of the Approvers window.	▼ An	ny approver from this group April Harrison Lizbeth Medina	Group Current		11/03/20: 11/03/20:	21 21	09:47 09:47
You are done!	۲ Æ Gene	erate Cha] 🖻 Collapse	e All	Expand In Progres	s	
	۲ Gene	erate Cha] 📄 Collapse	e All 🛛 🗄	Expand In Progres	5	



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.

Image: Contract of the second seco	Fort Wort	h Indeper	ndent Sch	ool District - Prod	
Tyler Menu : Search Departmental Functions Account Inquiry Purchase Order Inquiry Requisition Entry Requisition Approvals Account Inquiry Time Entry	Approvals	0	Notifications	1 [:]	0
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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

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GLOSSARY

Main Information Section

- **Dept/Loc** A general grouping category assigned to each employee, it is assigned based on work department/location.
- **Fiscal year*** An organization's financial year. A fiscal year may or may not coincide with the calendar year.
- **8** Requisition Number* A number automatically assigned for the requisition.
- **General commodity** A code that gives a general description; it standardizes information regarding purchased items.
- General description* A short description of the commodity, it will automatically populate based on the general commodity.
- 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.

- 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.
- Entered* The date that the requisition is created.
- **9** By* The user creating the requisition.

Vendor Information Section

- Vendor A person or company with whom business is transacted.
- Name* The vendor's name; will automatically populate when pressing the tab button after entering the vendor number.

Vendor Information Section

- 2 Ship to* The department/location connected to the username entering the requisition.
- Email* The email of the person submitting the requisition.
- Beference The email address of the person who can answer questions regarding the purchase.