



Warehouse Requisition Using A How-to Guide

The Warehouse Requisition creates pick tickets to order supplies from the district Warehouse. With these instructions, the end-user will be able to enter a warehouse requisition and review the approvers. Warehouse requisitions do not create purchase orders and do not require receiving.

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

FWISD Munis Land	ing Page		Q Search			()
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Warehouse Requisition Guide

2ND STEP

The Requisition window opens.

Click Add.



3RD **STEP**

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

Press the tab key and stop at the General commodity field.

The status, requisition number, Entered date and by will automatically populate.

ý Requisition Entry [TRAIN DATABASE Jan 25 2022] ÷ 0 . Back Accept Cancel MAIN TERMS/MISCELLANEOUS Main Information Dept/Loc * 346 Status 2 Created Current Nex Fiscal year * 2022 Needed by Requisition number * Entered * 02/16/2022 🛗 By First.Last General commodity PO expiration Ô General description Receive by Quantity Amount General Notes Three way match required Inspection required By Shipping Information Vendor Information

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.



Press the tab key to reach the General commodity field.

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

Accept O MAIN TERMS/MISCELLANEOUS Main Information Dept/Loc*			
MAIN TERMS/MISCELLANEOUS Main Information Dept/Loc * 346			
Dept/Loc * 346			
Fiscal year * 2022 Requisition number * 122 General commodity General description General Notes	CLASSIFIED LEARNING	Status Needed by Entered * PO expiration Receive by	2 Created 02/f6/2022 By FirstLast Quantity Amount Three way match required

5TH STEP

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

Use the arrow key to scroll to select 670 WAREHOUSE PURCHASE.

Click Accept or double click the commodity to select it.

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720		TELECOM	OGY RELATE MUNICATION	U SERVICES								
750		TEMPORA	RY PERSONI	NEL SERVICE	s							
760		TIME CLO	CKS & SYSTE	MS								
765		TIRES		UDMENT 8								
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781002		POST OFF		SE WITH A/F	PRE-PAY	CARD						
781005		TARGET PI	URCHASE W	ITH A/P PRE-	PAY CARD)						
785		AIRLINE T	ICKET PURCH	HASE - ONLY								
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Verify Quantity is selected in the Receive by section.

This option cannot be changed once the end-user clicks the accept button .

If a change needs to be made, it must be done before clicking accept .

MAIN TERMS/MISCELLANEOUS			
Main Information			
Dep/Loc * 346 sical year * 2022 © Cu Regulation number * 122287 Seneral commodity 670 WAREHOUSE PURCHASI @ General Notes Perdon Information	CLASSIFIED LEARNING rrent Next 8 WAREHOUSE PURCHASE E	Status Needed by Entered * PO expiration Receive by • • Quar Inspe	Created by First Last by First Last mithy Amount evaluated econ required by
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ine Items		-	
Line Commodity Inv item	Inv item loc Inv tran type Description	Vendor	

7TH STEP

Press the tab key to reach the Vendor Information.

When entering a warehouse requisition, the vendor number and information will not be populated.

Main Information Dept/Loc* 346 CLASSIFIED LEARNING Fiscal year* 2022 © Current Next General commodity 280 FIELD TRIPS	Status Needed by	2 Created	
General description FIELD TRIPS General Notes	PO expiration Receive by	02/16/2022 06/30/2022 Quantity • Three way m Inspection re	By kim.cummings Amount atch required equired By
Vendor Information		Shipping Infor	mation
Vendor Committed Name PO mailing		Ship to * Email	346 FWISD CLASSIFIED LEARNING 3150 MCCART AVE STE 254 FORT WORTH aracely.chavez@fwisd.org
Delivery method Print Fax E-Mail E-Procurement lemit 0 C Vendor/Sourcing Notes Vendor Quotes (0)		Reference	

Requisition Entry [TRAIN DATABASE Jan 25 2022]



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.

3. independent zur 3 [
Eack Accept Cancel		
MAIN TERMS/MISCELLANEOUS		
Main Information Dept/Loc * Sical year * 2022 Current Next Requisition number * 12228768 General commodity 670 General description WAREHOUSE PURCHASE General Notes	Status Neede Entere PO ex Receiv	d by Created d * 04/07/202
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Delivery method Print Fax E-Mail E-Procurement Remit 0 0 Vendor Quotes (0)	Email	FORT WORTH TX 76110 aracely.chavez@fwisd.org
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	Vendor/Sourcing Notes	
	🐇 Line Items	
10TH STEP	Image: Constraint of the second se	
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 * Freight Discount percent Credit Line item total
	Description *	Amount justification: UNKNOWN
	Miscellaneous	
	Manufacturer Bid Manufacturer item no. Vendor Required by	



11TH STEP

Enter the Quantity of items.

	Cancel			
equisition				
iscal year 2022	Number 12228767 Line 2			
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ype	Pick ticket Purchase		Credit Line item tota	al 00.
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12TH STEP

Tab to the Inventory Item field.

Click on the ellipses icon ... to view a list of inventory items.

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lequisition iscal year 2022	Number 12228768 Line 1			
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The Inventory Item window opens.

Scroll to item and double click to add to the requisition.

€ Back	Accept	O Cancel	Q Search	Output	Print	Display	PDF	E Save	Excel	Word			
ltem		Des	scription								Status	Image	
70635		PAF	PER, DUPLICAT	OR GREEN 8	1/2" X 11	" (10 RM/C	S)				A		
70640		PAF	PER, DUPLICAT	OR PINK 8 1,	2" X 11"	(10 RM/CS)					А		
70643		PAF	PER, DUPLICAT	'OR 8 1/2" X	I1" WHIT	E (10 RMS/0	CS) 20# BF	RIGHT WHIT	E		A		
70670		PAF	PER, DUPLICAT	'OR 8 1/2" X	14" WHITI	E (10 RM/C	5)				А		
70680		PAF	PER, DUAL PUI	RPOSE 3 HOL	E 8 1/2" X	(11" WHITE	10 RM/C	S			А		
70775		PEN	NCILS, LEAD #	2, W/ERASER	12/BX						A		

14тн **STEP**

The Unit price, Description and Line Item total will populate.

Press the tab key and the radial button for Pick Ticket. Should autofill. If not, click the Pick Ticket radial button.

Pick Ticket has to be selected before saving the line item information.

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escription *	Apper, DUPLICATOR BLUE 8 1/2" X 11" (10 RM/CS)		Amount justification:	UNKNOWN
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omit	0		Notify I	buyer

Warehouse Requisition Guide



Tab 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.

Warehouse Requisition Guide

Back Accept	Cancel Search Delete Copy GL Acct Budget		
equisition			
cal year 2022	Number 12228767 Line 1		
tail			
uantity * mmodity ventory item cation pe	1.00 6700001		Unit price 32.80490 UOM * CS Freight Discount percent
scription *	PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RMS/CS) 20# BRIGHT WHITE AddTDesc/Notes		Amount justification: UNKNOWN
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16тн **STEP**

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

Back Accept	Cancel Search Delete Copy GL Acct Budget			
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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.

Back Accept Ca	Q X C D Jancel Search Delete Copy GL Acct Budget			
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uantity unit of the second sec	1.00 670043		Unit price UOM * Cs Freight Discount percent Credit	32.80490 .00 .00
			Line item total	32.80
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escription * liscellaneous lanufacturer lanufacturer item no. endor o mailing elivery method emit endor item no. 999 box	PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RUS/CS) 20# BRIGHT WHITE AddTDesc/Notes 85100100 Fax Fax F-Andui Print 0 Vendor/Sourcing Notes	Bid Dept/Loc Required by Receipt notific Capital asset WO number WO task	Line item total Amount justification:	3280 UNKNOWN CLASSIFIED LEARNING

Informational:

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

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Review the information and click on Release.

The Status will update from (4) Allocated to

(6) Released.



Note: There is no receipt on warehouse order. Deliveries are signed for and a budget transfer is performed to "pay" for the items.

Contact Tricia Reyna at 815-7501 for questions regarding Warehouse requisitions.



PRINT REQUISITION

Optional

1st STEP

Click on PDF.



2ND STEP

The Options window opens. Choose Req Format Click OK.

AIN TERMS/N	IISCELLANEOUS		
Information			
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Items			
ne Commodity 1	Invitem Invitem Invitem Invitem Invitem Upescription Field Trip to Fort Worth Zoo	Vendor Qpy or 25 students. (1145) FORT WORTH ZOO ASSOCIATION 1.00	Unit price Freight Disc % Credi 250.0000 0.00 0.00 0.0

3RD **STEP**

The Printing Options window opens.

Click Accept

\$	Printing	g Options
← Back	Accept	⊘ Cancel
Print Opti Full GL Org/O Print C Print v Print a Print u	ons - Account N bj GL account o endor SSN/ uthorized b iser-defined	lumber description with each line /FID by signature line I fields



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.

Bill To FWISD ACCOUNTS 100 N. UNIVERS FORT WORTH, TX 76107 Vendor	S PAYABLE	 140-е	Acc	======	Requ	isitio	n 122	28071-00	FY 2022	
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Vendor			Stá	tus: 0	Converte	ed			Page 1	
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LOOK UP THE APPROVERS FOR THE REQUISITION

1ST STEP

Click on Approvers. A new window opens.

€ Back	Q Search	Browse	+ Add	Update	× Delete	Dutput	🖶 Print	Display	DF	F Save	ReadyForms	ReadyForms Delivery Definitions	⊠ Email	Schedule	⁽⁰⁾ Ø Attach	-	S witch Form	Line Items
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Vendor In	formation														a Informati	on		
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My App	rovals	Approve		Reject	F	orward	1	Hold		Арр	rovers							



2ND STEP	\sim	& Work Flo	w Status				
Click Expand All.		ack Search					
A list of approvers will dis- play. There are reqs that will have multiple approval levels as in the example	App Nar ARA	rovers' comments ne ACELY CHAVEZ	Action taken da 11/03/2021	Action ta 09:24	Action Approved	Comment CTE request after bo	ard 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. When the status displays "In Progress", the requisition is in that approver's queue. Click on Back to close out of the Approvers window.	Step Step	 Any approver from 1 ARACELY CHAVE2 Any approver from 1 April Harrison Lizbeth Medina 	Status Complete (Approv this group Group Complete Z Complete In Progress this group Group Current	ed)	Activated 03/11/202 03/11/202 03/11/202	I Date Activated 22 10:55 22 11:03 22 11:03	
	4	Generate Chai	pand All	e All		5	



POP-UP BLOCKED

If the PDF doe 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 **1** to update the settings to allow for pop-ups.

The default setting for popups is set to Continue blocking.

Click the button to Always allow pop-ups and redirects from https:// muniserpapp.fwisd.org

Click Done







NOTIFICATIONS

After a requisition has	🔆 FWISD Munis Landing Page		Q Search	
been through the approval process, a	Fort Worth Independ	dent Schoo	ol District - Prod	
that it has been convert- ed to a Purchase Order.			1 ·	0
This is only a notifica- tion and does not require any action. How- ever, It would be bene- ficial to review the notifi- cations for rejected req- uisitions and dismiss	Tyler Menu Q search Y Munis > Financials > Asset Maintenance Y Departmental Functions	:	Favorites Departmental Functions Account Inquiry Purchase Order Inquiry Requisition Entry Requisition Approvals	^
notifications of reqs that have been pro- cessed.	Account induity Notifications All Process Codes All Dates	¥	RCP: Requisitions converted to purchase orders	C
Close can be selected at the bottom of the screen.	Select All Refresh RCP: Requisitions converted to purchase orders \$1,793.32 - EPROCUREMENT CC FOR OFFICE DEPOT	(0/2) 2/7/2022	Created Mon Feb 7 2022 Reason Not available	
			Requisition Header Fiscal year: 2022	
			Requisition number: 12223819 General description: EPROCUREMENT CC FOR OFFICE DEPOT	
			Contract: Total amount: \$1,793.32	
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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.
- **2** 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.