

# Warehouse Requisition *Using Munis*

## 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.

### 1<sup>ST</sup> 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

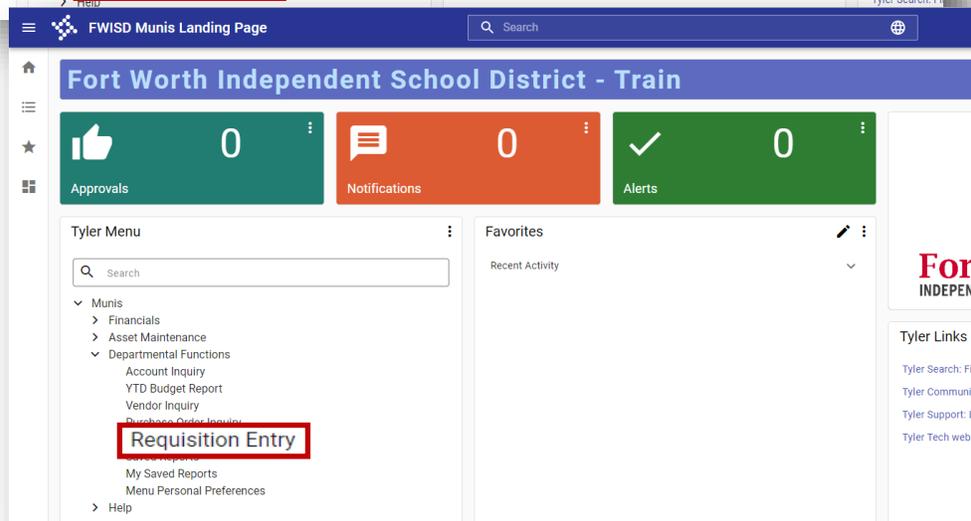
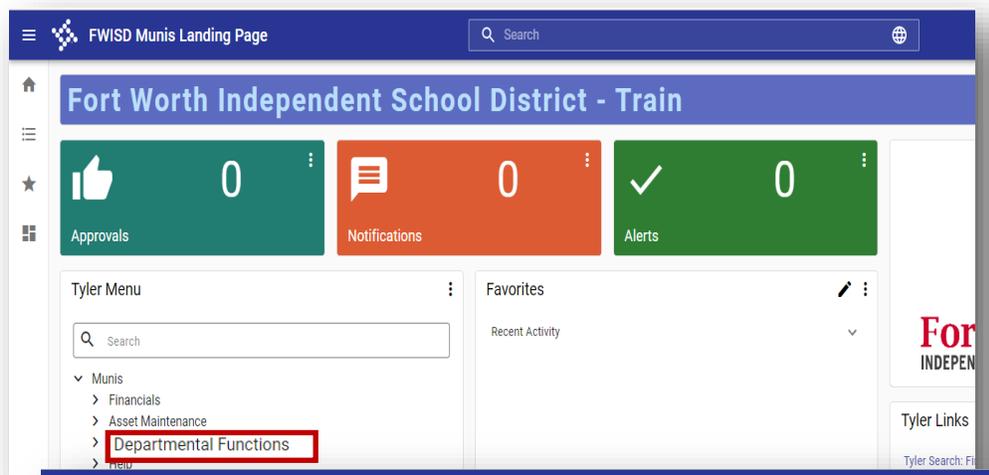


The FWISD Munis Landing Page Opens.

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 in a red box, is located in the top toolbar. The main form area is currently empty, with sections 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 stop at the General commodity field.

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

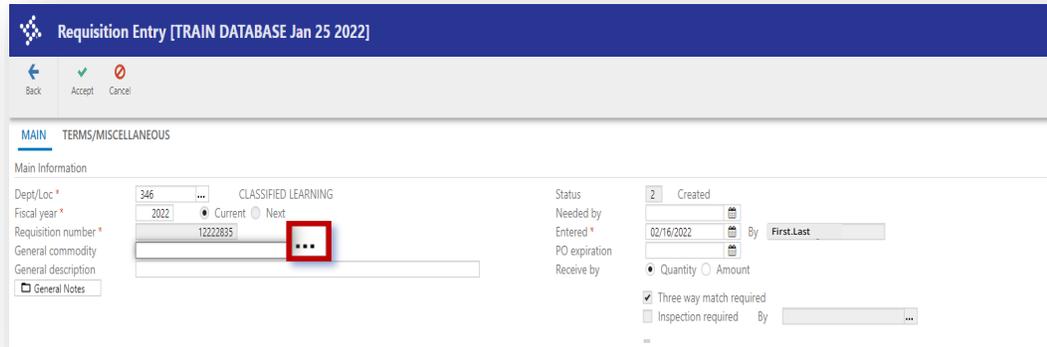
The screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' window with several fields populated. Red arrows point to the following fields: Dept/Loc (346), Fiscal year (2022), Status (2 Created), Entered date (02/16/2022), and By (First.Last). The 'Current' radio button is selected for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

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]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc \* 346 ... CLASSIFIED LEARNING

Fiscal year \* 2022 Current Next

Requisition number \* 1222835 ...

General commodity

General description

General Notes

Status 2 Created

Needed by

Entered \* 02/16/2022 By First.Last

PO expiration

Receive by

Quantity Amount

Three way match required

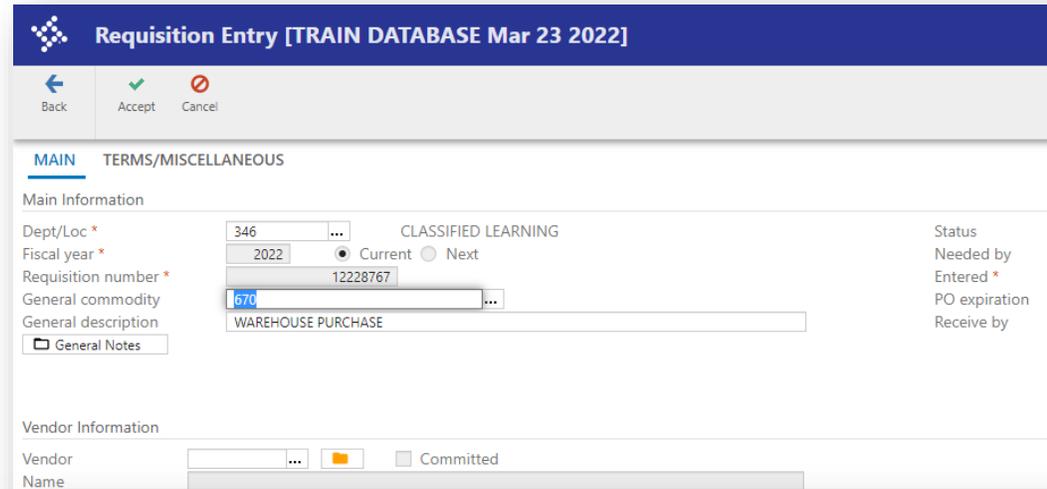
Inspection required By

## 5TH STEP

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

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

Click Accept or double click the commodity to select it.



Requisition Entry [TRAIN DATABASE Mar 23 2022]

Back Accept Cancel

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc \* 346 ... CLASSIFIED LEARNING

Fiscal year \* 2022 Current Next

Requisition number \* 12228767

General commodity 670 ...

General description WAREHOUSE PURCHASE

General Notes

Status

Needed by

Entered \*

PO expiration

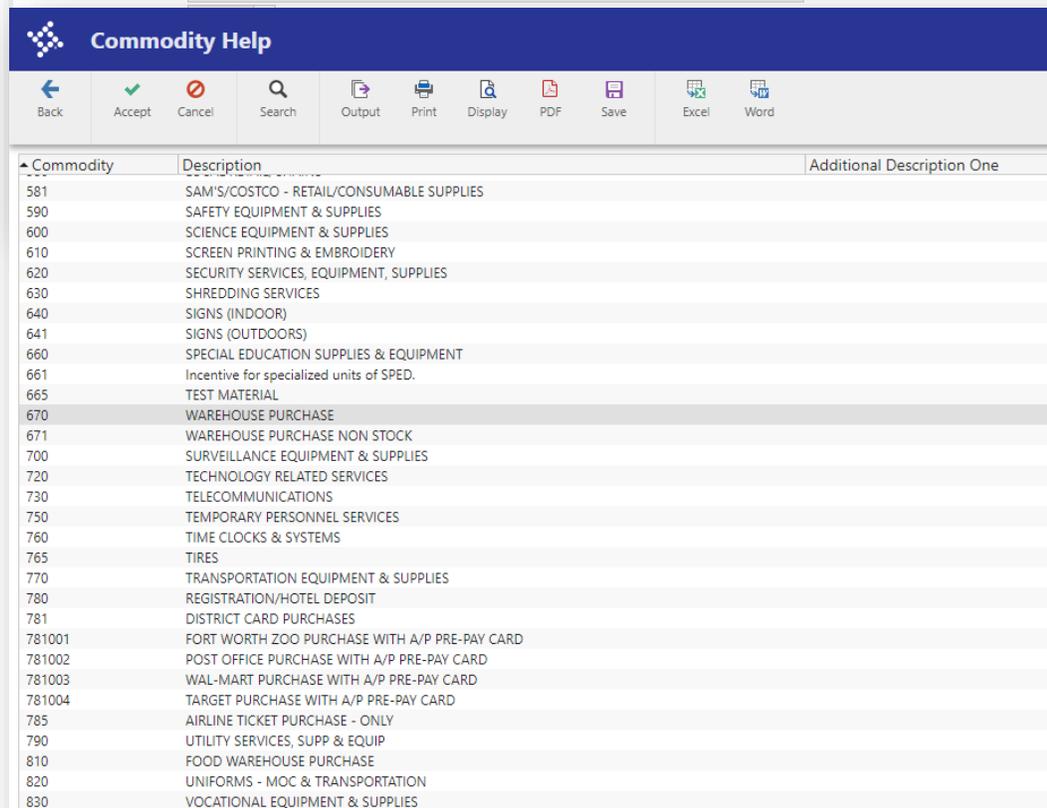
Receive by

Vendor Information

Vendor

Name

Committed



Commodity Help

Back Accept Cancel Search Output Print Display PDF Save Excel Word

Commodity	Description	Additional Description One
581	SAM'S/COSTCO - RETAIL/CONSUMABLE SUPPLIES	
590	SAFETY EQUIPMENT & SUPPLIES	
600	SCIENCE EQUIPMENT & SUPPLIES	
610	SCREEN PRINTING & EMBROIDERY	
620	SECURITY SERVICES, EQUIPMENT, SUPPLIES	
630	SHREDDING SERVICES	
640	SIGNS (INDOOR)	
641	SIGNS (OUTDOORS)	
660	SPECIAL EDUCATION SUPPLIES & EQUIPMENT	
661	Incentive for specialized units of SPED.	
665	TEST MATERIAL	
670	WAREHOUSE PURCHASE	
671	WAREHOUSE PURCHASE NON STOCK	
700	SURVEILLANCE EQUIPMENT & SUPPLIES	
720	TECHNOLOGY RELATED SERVICES	
730	TELECOMMUNICATIONS	
750	TEMPORARY PERSONNEL SERVICES	
760	TIME CLOCKS & SYSTEMS	
765	TIRES	
770	TRANSPORTATION EQUIPMENT & SUPPLIES	
780	REGISTRATION/HOTEL DEPOSIT	
781	DISTRICT CARD PURCHASES	
781001	FORT WORTH ZOO PURCHASE WITH A/P PRE-PAY CARD	
781002	POST OFFICE PURCHASE WITH A/P PRE-PAY CARD	
781003	WAL-MART PURCHASE WITH A/P PRE-PAY CARD	
781004	TARGET PURCHASE WITH A/P PRE-PAY CARD	
785	AIRLINE TICKET PURCHASE - ONLY	
790	UTILITY SERVICES, SUPP & EQUIP	
810	FOOD WAREHOUSE PURCHASE	
820	UNIFORMS - MOC & TRANSPORTATION	
830	VOCATIONAL EQUIPMENT & SUPPLIES	

## 6TH STEP

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 .

**Requisition Entry [TRAIN DATABASE Mar 23 2022]**

Back Accept Cancel

**MAIN TERMS/MISCELLANEOUS**

Main Information

Dept/Loc \* 346 ... CLASSIFIED LEARNING  
 Fiscal year \* 2022 ... Current Next  
 Requisition number \* 12228788  
 General commodity 670 ... WAREHOUSE PURCHASE  
 General description WAREHOUSE PURCHASE  
 General Notes

Status 2 Created  
 Needed by  
 Entered \* 04/07/2022 By First.Last  
 PO expiration  
 Receive by **Quantity** Amount  
 Three way match required  
 Inspection required By

Vendor Information

Vendor 0 ... Committed  
 Name  
 PO mailing 0 ...  
 Delivery method  Print  Fax  E-Mail  E-Procurement  
 Remit 0 ...  
 Vendor/Sourcing Notes  Vendor Quotes (0)

Shipping Information

Ship to \* 346 ...  
 FWISD IT TRAINING & COMPLIANCE  
 100 N. UNIVERSITY DR., STE 224  
 FORT WORTH TX 76107  
 Email aracely.chavez@fwisd.org  
 Reference

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor	Qty
------	-----------	----------	--------------	---------------	-------------	--------	-----

## 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.

**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 kim.cummings  
 PO expiration 06/30/2022  
 Receive by  Quantity  Amount  
 Three way match required  
 Inspection required By

Vendor Information

Vendor  ... Committed  
 Name  
 PO mailing 0 ...  
 Delivery method  Print  Fax  E-Mail  E-Procurement  
 Remit 0 ...  
 Vendor/Sourcing Notes  Vendor Quotes (0)

Shipping Information

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

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor
------	-----------	----------	--------------	---------------	-------------	--------

## 8TH STEP

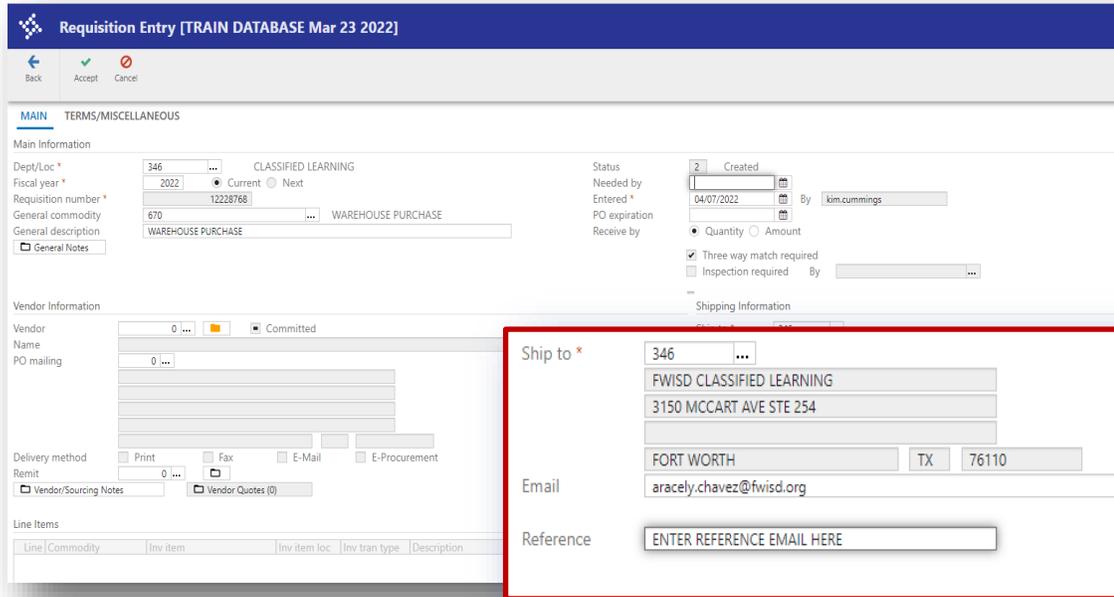
Press the tab key to reach the Ship to and Email fields.

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 Mar 23 2022]**

Back Accept Cancel

**MAIN TERMS/MISCELLANEOUS**

Main Information

Dept/Loc \* 346 ... CLASSIFIED LEARNING  
 Fiscal year \* 2022 ... Current Next  
 Requisition number \* 12228768  
 General commodity 670 ... WAREHOUSE PURCHASE  
 General description WAREHOUSE PURCHASE  
 General Notes

Status 2 Created  
 Needed by  
 Entered \* 04/07/2022 By kim.cummings  
 PO expiration  
 Receive by  
 Quantity  Amount  
 Three way match required  
 Inspection required By

Shipping Information

Vendor Information

Vendor 0 ... Committed  
 Name  
 PO mailing 0 ...  
 Delivery method  Print  Fax  E-Mail  E-Procurement  
 Remit 0 ...  
 Vendor/Sourcing Notes  Vendor Quotes (0)

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description

**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

## 9TH 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  
 General Notes

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  
 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 HERE

## 10TH 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 \*  
 Add'l Desc/Notes

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

Miscellaneous

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

## 11TH STEP

Enter the Quantity of items.

The screenshot shows the 'Line Items' form for Requisition Number 12228767, Line 2. The 'Quantity' field is set to 2.00. Other fields include 'Commodity', 'Inventory item', 'Location', 'Type' (Purchase), 'Description', 'Manufacturer', 'Vendor', 'Delivery method', 'Bid', 'Dept/Loc' (346), 'Required by', 'Receipt notification to', 'Capital asset', 'WO number', and 'Notify buyer'.

## 12TH STEP

Tab to the Inventory Item field.

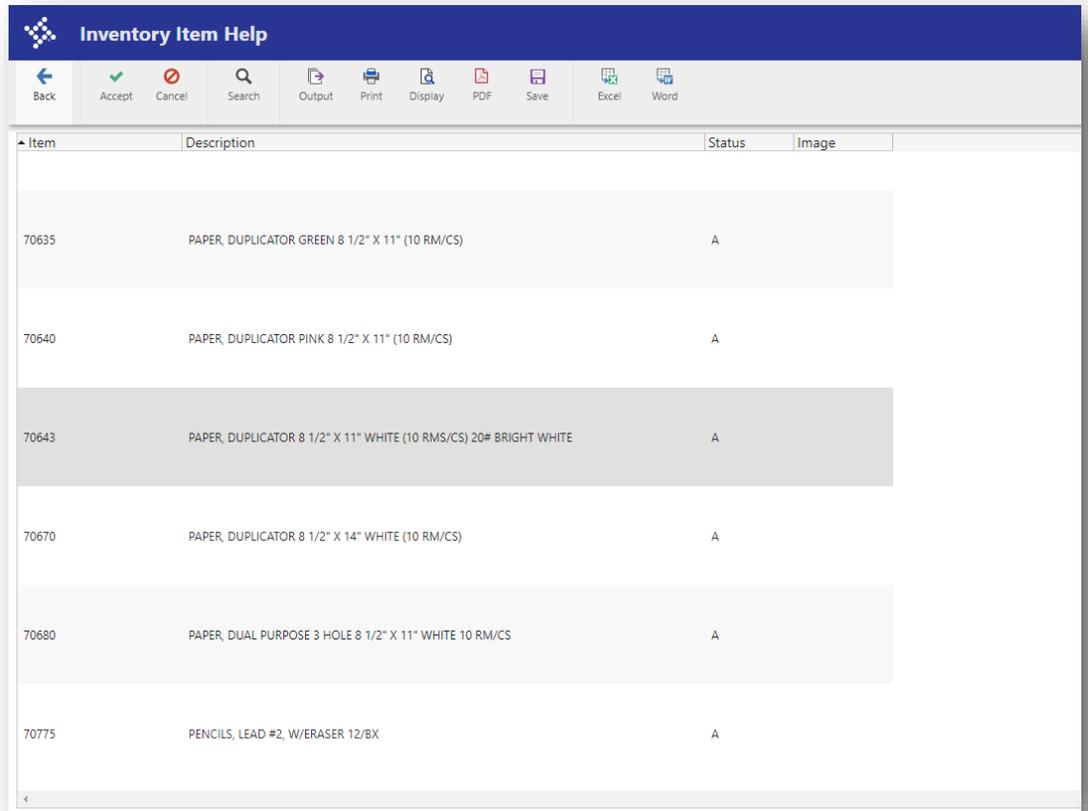
Click on the ellipses icon  to view a list of inventory items.

The screenshot shows the 'Line Items' form for Requisition Number 12228768, Line 1. The 'Quantity' field is set to 1.00. The 'Inventory item' field has an ellipses icon highlighted with a red arrow. The 'Description' field contains 'PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RMS/CS) 25#'. Other fields include 'Commodity', 'Location', 'Type' (Purchase), 'Manufacturer', 'Vendor', 'Delivery method', 'Bid', 'Dept/Loc' (346), 'Required by', 'Receipt notification to', 'Capital asset', 'WO number', and 'Notify buyer'.

## 13TH STEP

The Inventory Item window opens.

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

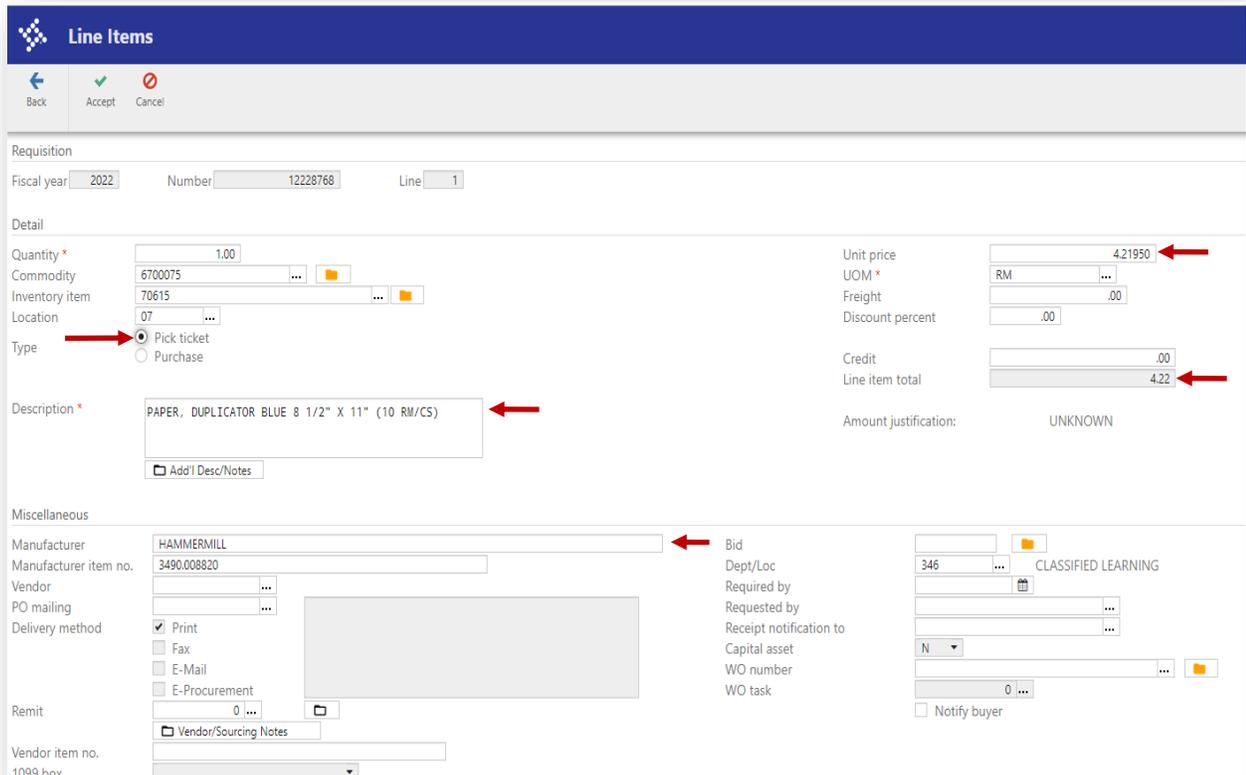


## 14TH STEP

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.



## 15TH STEP

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.

## 16TH STEP

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

## 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.

## Informational:

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

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor	Qty	Unit price	Freight	Disc %
1	6700081	70643	07	I	PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RMS/CS) 2		1.00	32.80490	0.00	0.00

## 17<sup>TH</sup> STEP

Review the information and click on Release.

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

The screenshot shows the 'Requisition Entry' interface for 'TRAIN DATABASE Mar 23 2022'. The 'Release' button in the top right toolbar is highlighted with a red box. A red arrow points to the 'Released' status dropdown in the 'Status' section, which is currently set to 'Released'. The main information section shows: Dept/Loc: 346 CLASSIFIED LEARNING; Fiscal year: 2022; Requisition number: 12228768; General commodity: 670 WAREHOUSE PURCHASE; General description: WAREHOUSE PURCHASE. The vendor information section shows: Vendor Name: FWISD IT TRAINING & COMPLIANCE; PO mailing: 100 N. UNIVERSITY DR., STE 224; FORT WORTH, TX 76107; Email: aracely.chavez@fwisd.org.

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

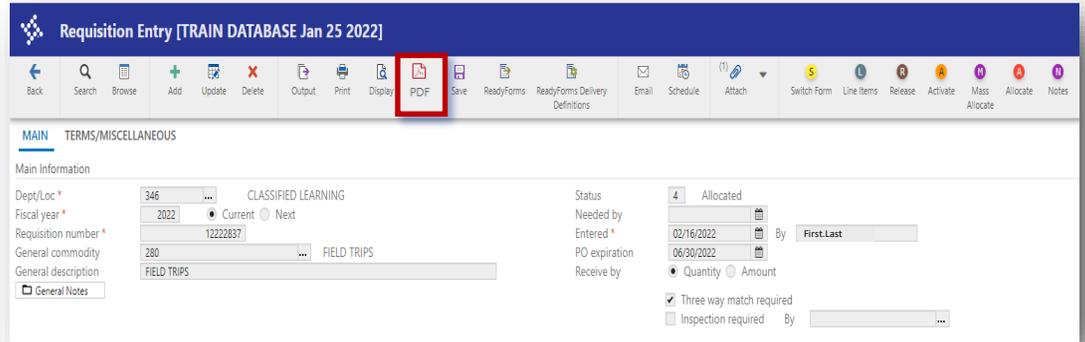
**Contact Tricia Reyna at 815-7501 for questions regarding Warehouse requisitions.**

## PRINT REQUISITION

### Optional

### 1<sup>ST</sup> STEP

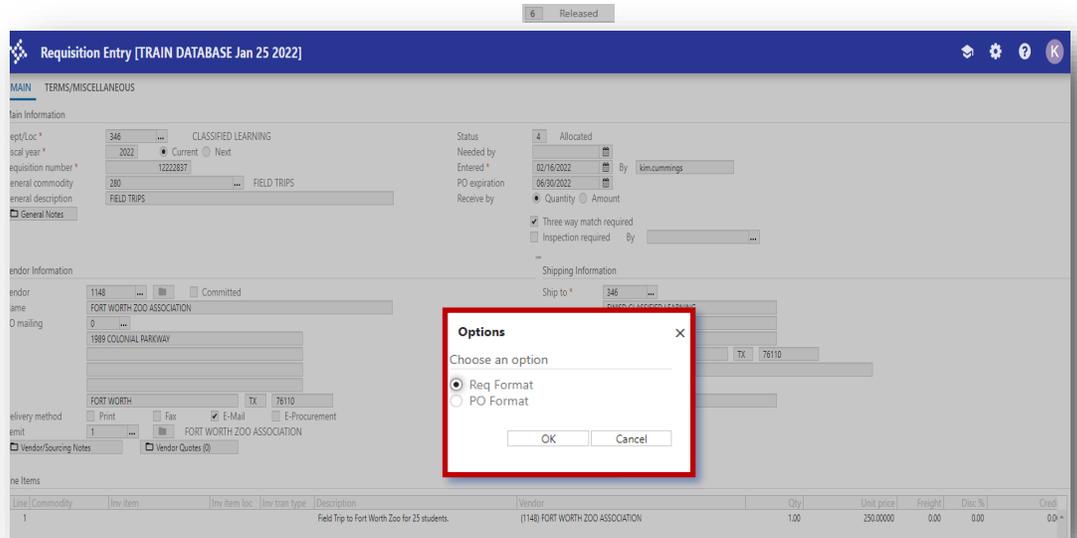
Click on PDF.



### 2<sup>ND</sup> STEP

The Options window opens.

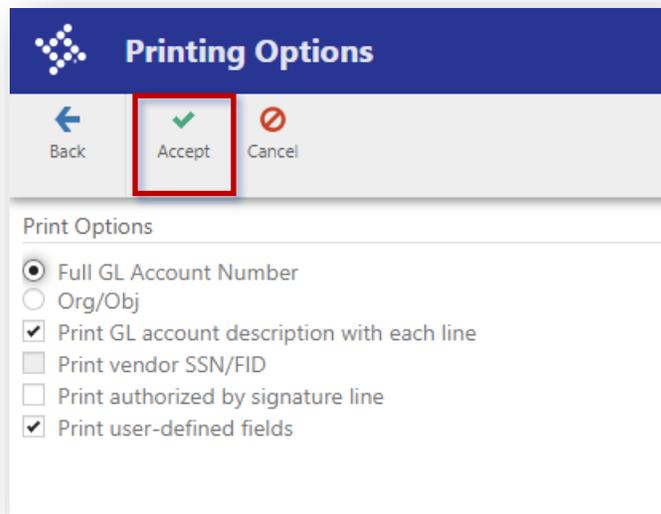
Choose Req Format  
Click OK.



### 3<sup>RD</sup> 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.

**munis**  
a tyler erp solution

Bill To: FWISD ACCOUNTS PAYABLE, 100 N. UNIVERSITY DR. 140-E, FORT WORTH, TX 76107  
 Requisition 12228071-00 FY 2022  
 Acct No: 199-21-6399-001-999-99-346-000000-  
 Review: Buyer: ALYSIA CAMPBELL  
 Status: Converted Page 1

Vendor: FORT WORTH, TX 76107  
 Ship To: FWISD IT TRAINING & COMPLIANCE, 100 N. UNIVERSITY DR., STE 224, FORT WORTH, TX 76107, aracely.chavez@fwisd.org  
 Delivery Reference: Kim Cummings

Date Ordered	Vendor Number	Date Required	Ship Via	Terms	Department
03/11/22	100000				IT TRAINING and Compliance

LN	Description / Account	Qty	Unit Price	Net Price
001	PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RMS/CS) 20# BRIGHT WHITE	2.00	32.80490	65.61
	Vendor Item Inventory Item/Loc 70643 07			
1	199-21-6399-001-999-99-346-000000-			65.61

Requisition Link

Requisition Total: 65.61

\*\*\*\*\* General Ledger Summary Section \*\*\*\*\*  
 Account 199-21-6399-001-999-99-346-000000- Amount 65.61 Remaining Budget 3279.11  
 INSTRUCTIONAL ADMIN GENERAL SUPPLIES

\*\*\*\*\* Approval/Conversion Info \*\*\*\*\*  
 Activity Date Clerk Comment  
 Approved 03/11/22 ARACELY CHAVEZ  
 Approved 03/11/22 April Harrison Auto approved by: LIZBETH.QUIN

## LOOK UP THE APPROVERS FOR THE REQUISITION

### 1st STEP

Click on Approvers.  
A new window opens.

Requisition Entry [FWISD Live Data]

MAIN TERMS/MISCELLANEOUS

Main Information  
 Dept/Loc: 346 IT TRAINING and Compliance  
 Fiscal year: 2022  
 Requisition number: 12228071  
 General commodity: 670 WAREHOUSE PURCHASE  
 General description: WAREHOUSE PURCHASE

Vendor Information  
 Vendor: [Redacted]  
 Name: [Redacted]  
 PO mailing: [Redacted]

Shipping Information  
 Ship to: 346 FWISD IT TRAINING & COMPLIANCE, 100 N. UNIVERSITY DR., STE 224, FORT WORTH, aracely.chavez@fwisd.org  
 Reference: Kim Cummings

Line Items  

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor
1	6700081	70643	07	I	PAPER, DUPLICATOR 8 1/2" X 11" WHITE (10 RMS/CS) 2	

Total amount: 65.61

Workflow  
 My Approvals Approve Reject Forward Hold **Approvers**

## 2ND STEP

Click Expand All.

A list of approvers will display.

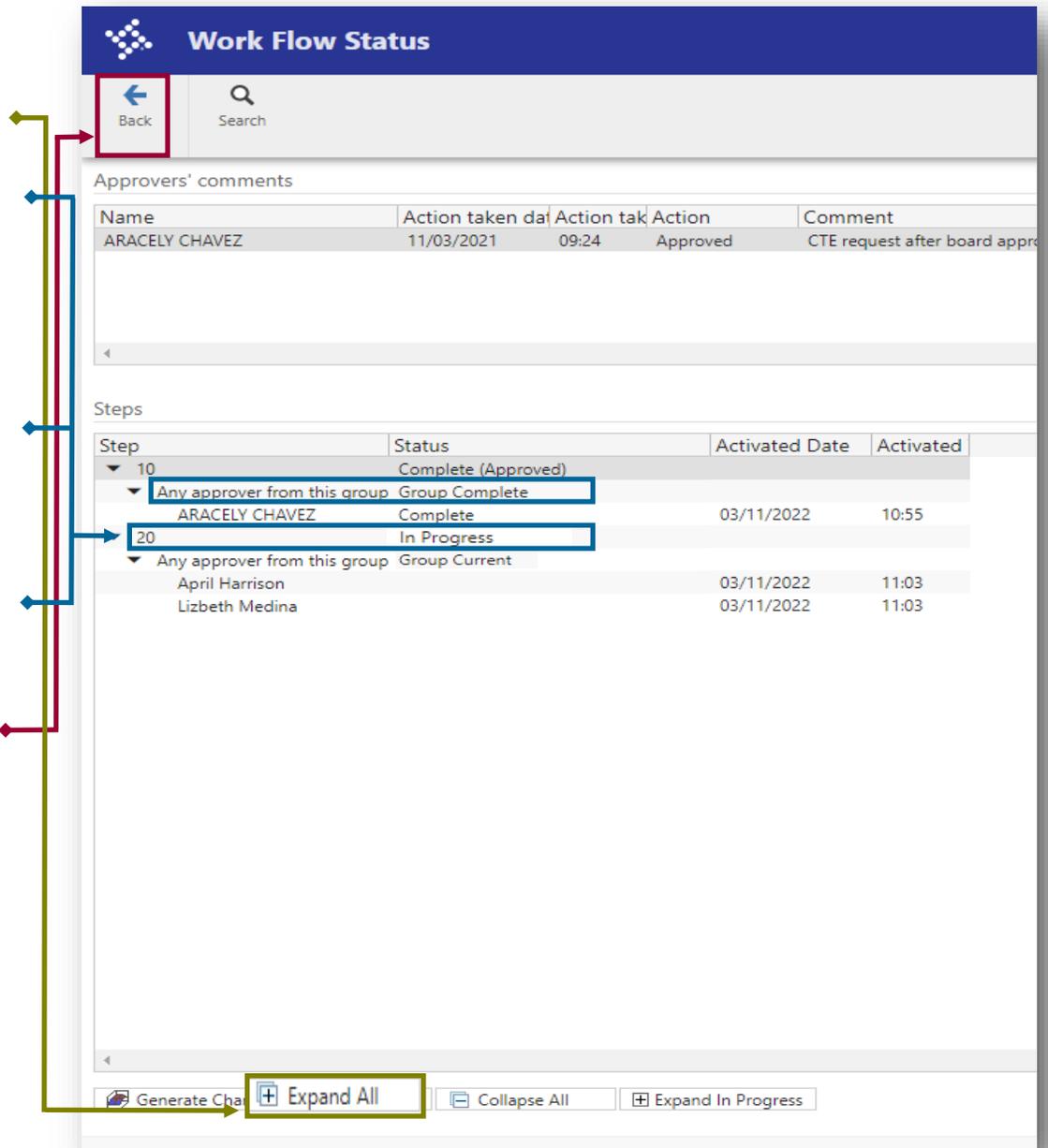
There are reqs that will have multiple approval levels as in the example.

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	03/11/2022	10:55
20	In Progress		
Any approver from this group	Group Current		
April Harrison		03/11/2022	11:03
Lizbeth Medina		03/11/2022	11:03

Generate Chart Expand All Collapse All Expand In Progress

## 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.

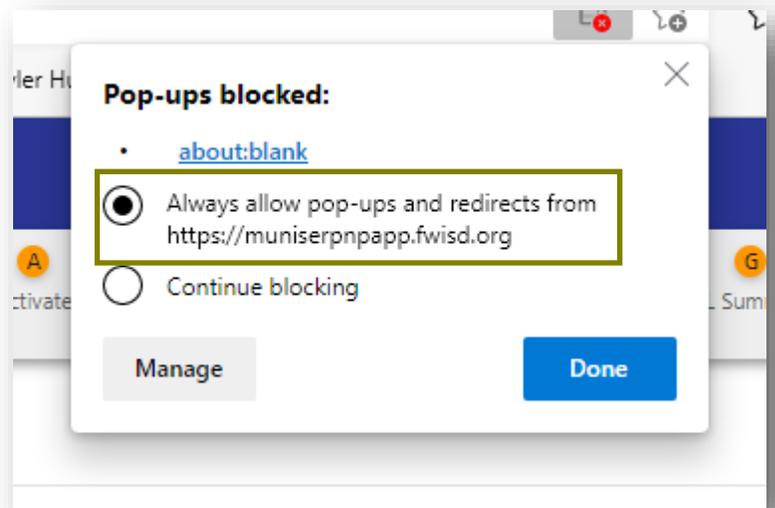
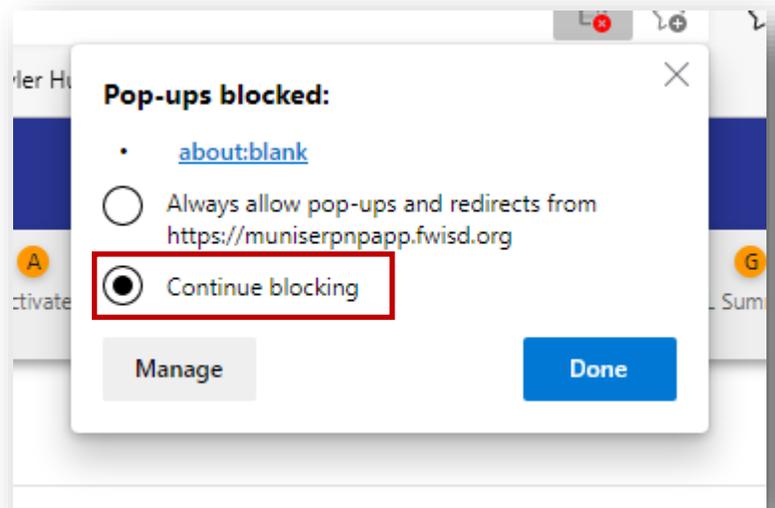
This can be seen by the icon at the end of the address bar.

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

Click Done

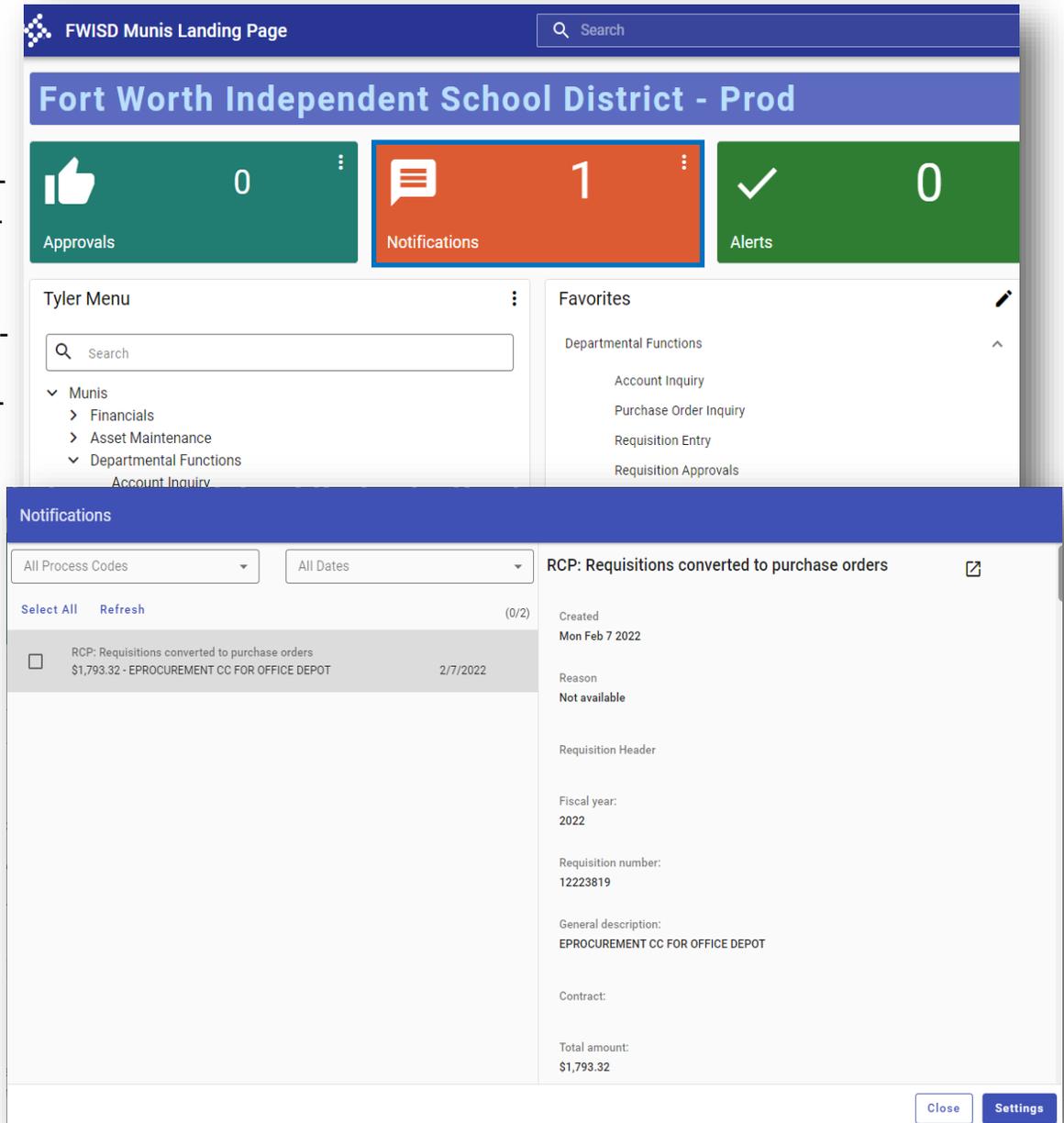


## NOTIFICATIONS

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 categories: Munis, Financials, Asset Maintenance, and Departmental Functions. To the right, there is a "Favorites" section with a list of departmental functions: Account Inquiry, Purchase Order Inquiry, Requisition Entry, and Requisition Approvals.

The Notifications section is expanded, showing a notification titled "RCP: Requisitions converted to purchase orders". The notification details are as follows:

- 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

At the bottom of the notification window, there are "Close" and "Settings" buttons.

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

**Submit**

**Notifications**

All Process Codes All Dates

Select All Refresh (0/0)

No Items to Display

**Close** Settings

The screenshot shows the 'Warehouse Requisition' form with the following sections and callouts:

- Main Information:** Callouts 1-5 point to Dept/Loc, Fiscal year, Requisition number, General commodity, and General description. Callout 6 points to the Status dropdown.
- Vendor Information:** Callouts 10-11 point to Vendor and Name fields.
- Shipping Information:** Callouts 12-14 point to Ship to, Email, and Reference fields.
- Line Items:** A table with columns: Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, Vendor, Qty, Unit price, Freight, Disc %, Credit.

## 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.
- ### Shipping Information Section
- 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.