ePROCUREMENT *Using Munis*

A How-to Guide

The Requisition Entry program accepts and processes requisitions, which are department purchase requests that precede purchase order creation. With these instructions, the end-user will be able to enter an e-Procurement 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.

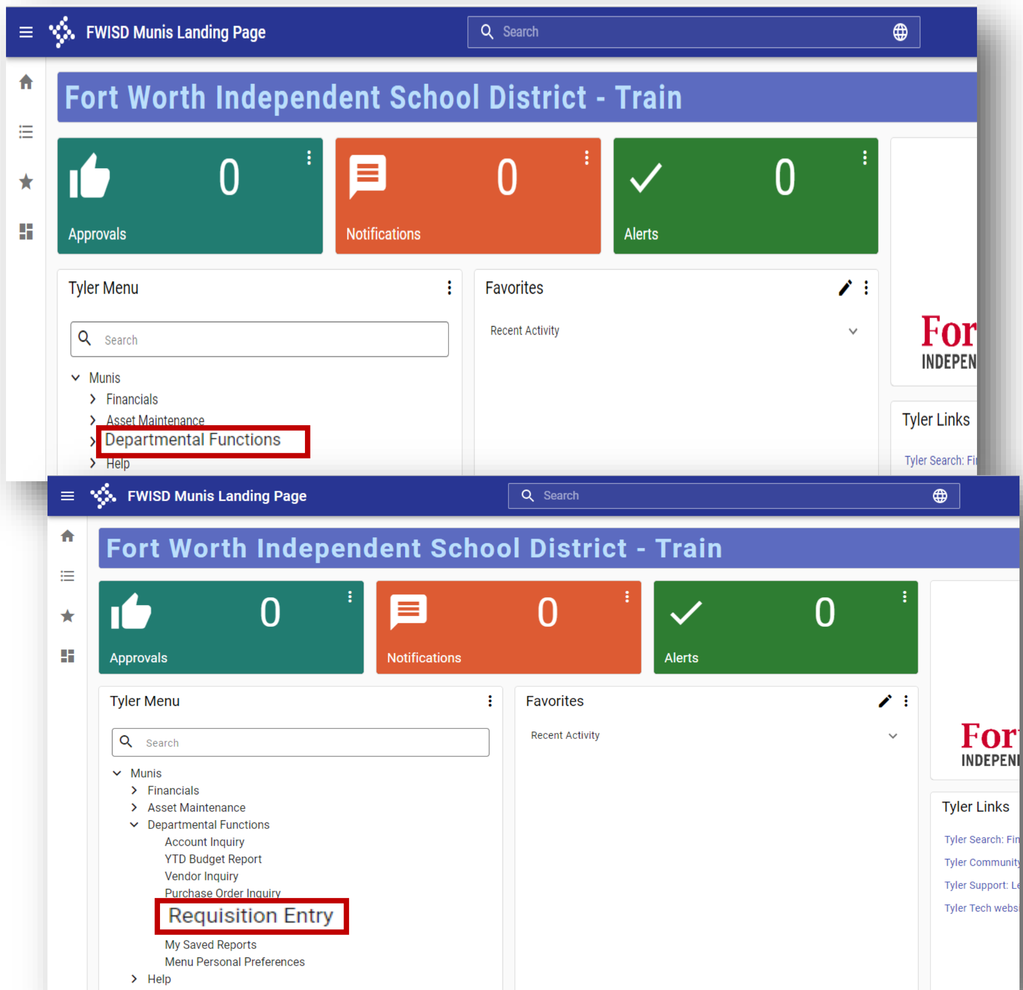
Locate and click on the Munis icon

The FWISD Munis Landing Page Opens.

From the Tyler Menu:

Click Departmental Functions

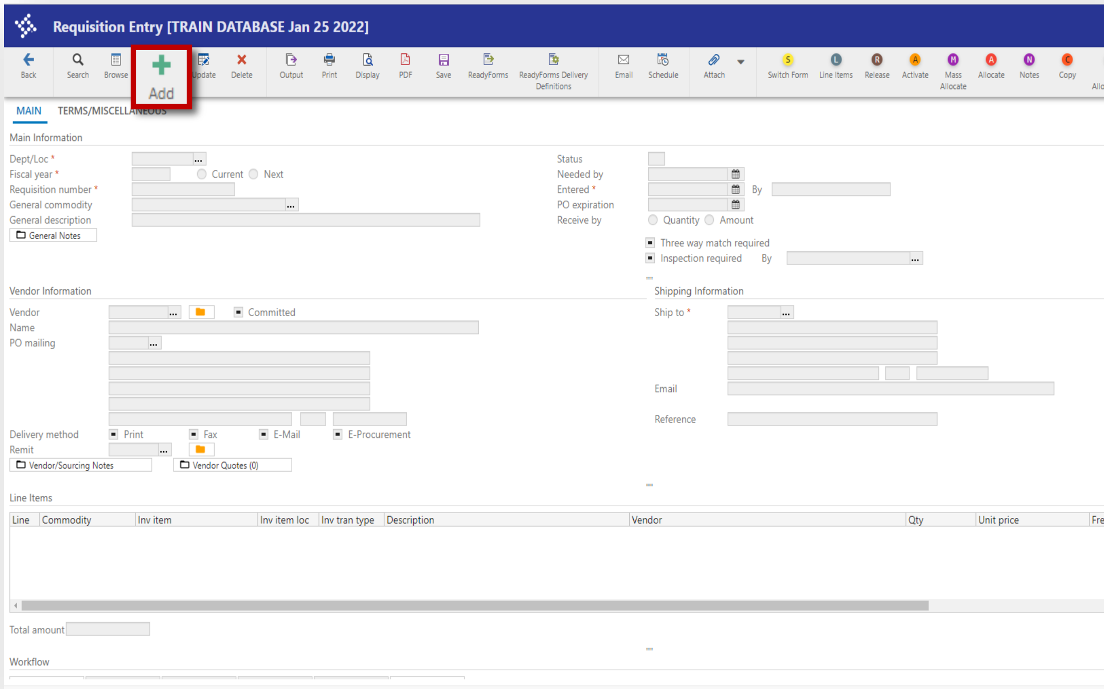
Click Requisition Entry



2ND STEP

The Requisition window opens.

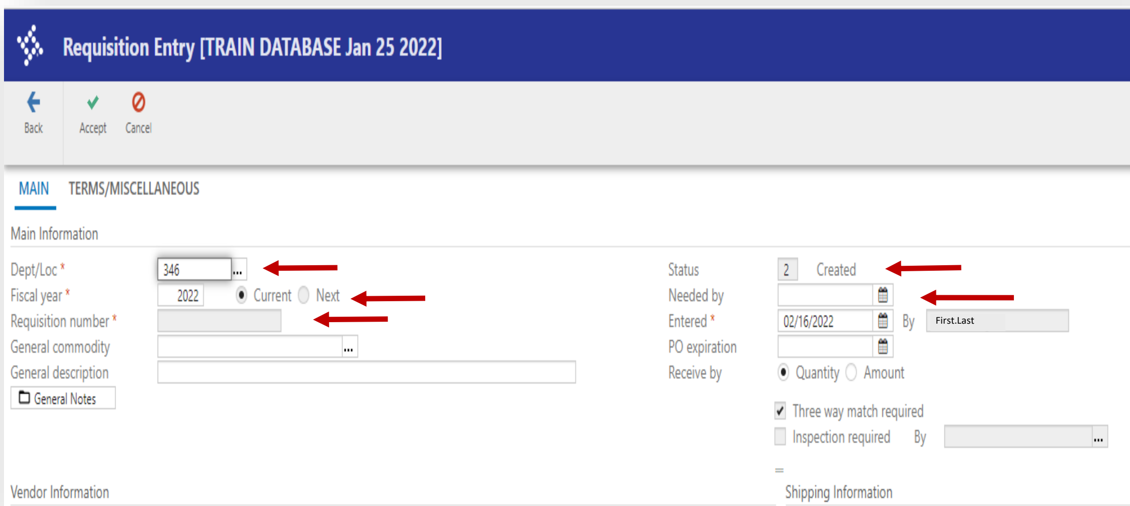
Click Add.



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.



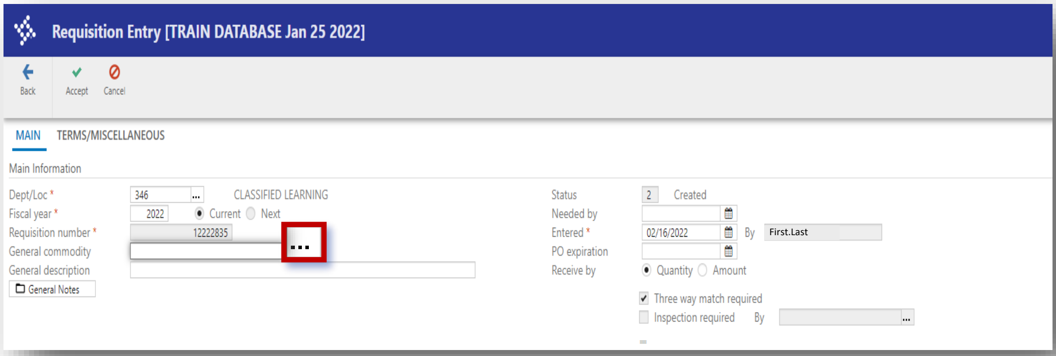
Remember to press the Tab Button to move from field to field! A few field values are automatically populated depending on info entered in previous fields.

Revised 04/08/22

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.



5TH STEP

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

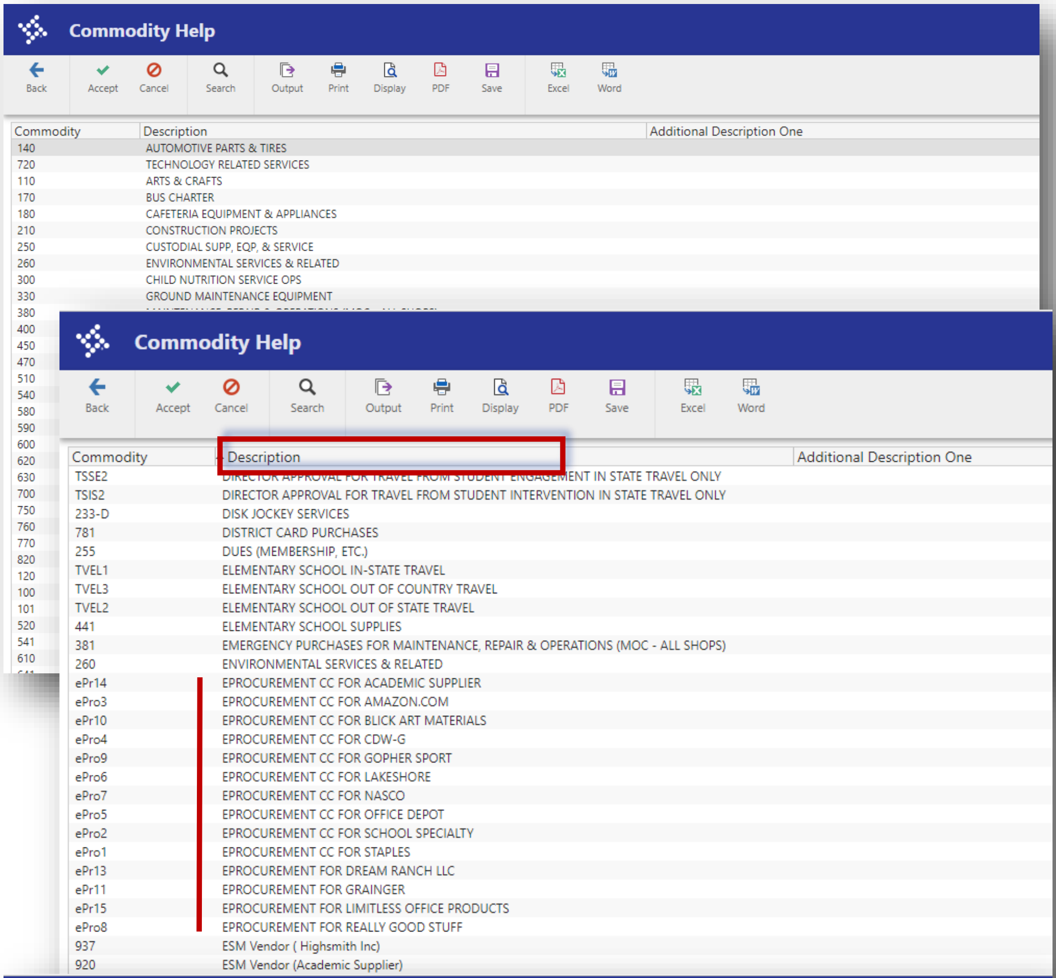
To make searching easier, left click on Description at the top of the list and the commodities will be in alphabetical order.

Scroll down to the ePro vendors select the vendor to be used for online shopping.

Click Accept or double click the commodity to select it.

When adding ePro commodity codes where there are double digits, do not include the letter O. The format will change to ePrxx.

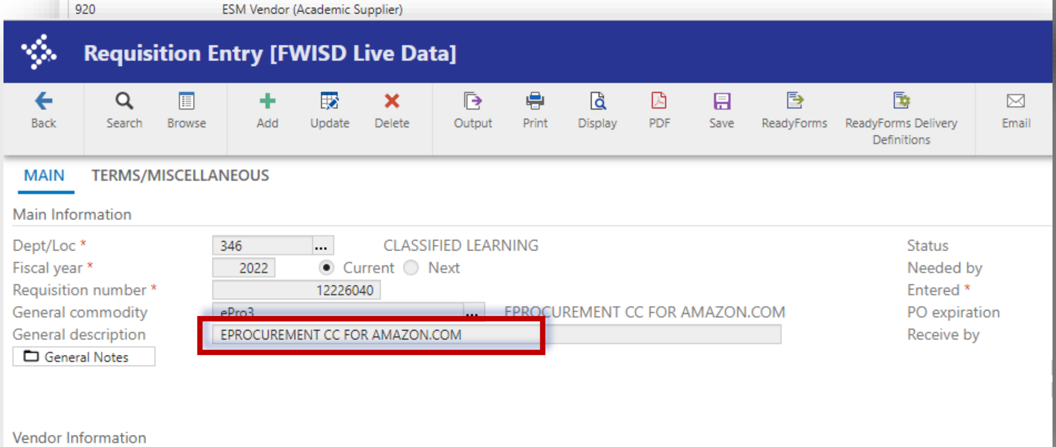
Ex. *ePr14 for Academic Supplier*



6TH STEP

The screen returns to the main page.

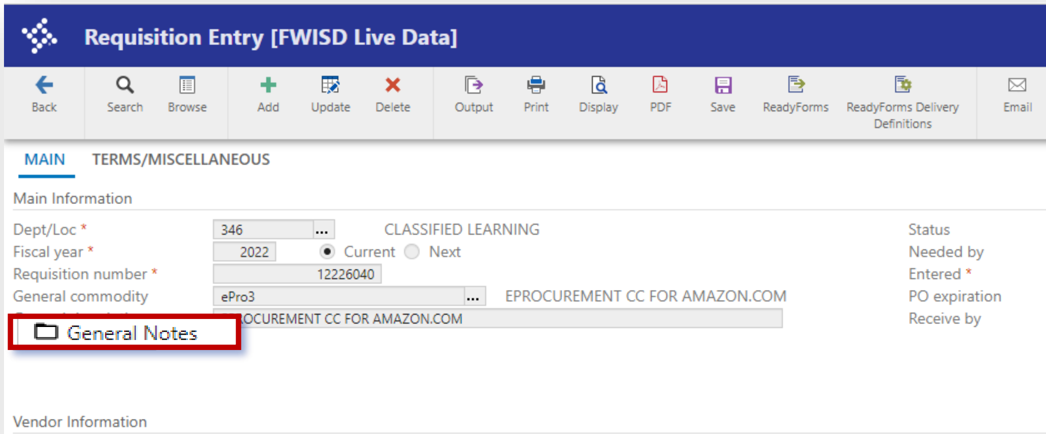
Press the tab key and the General description field will populate.



7TH STEP

Click on the General Notes button.

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



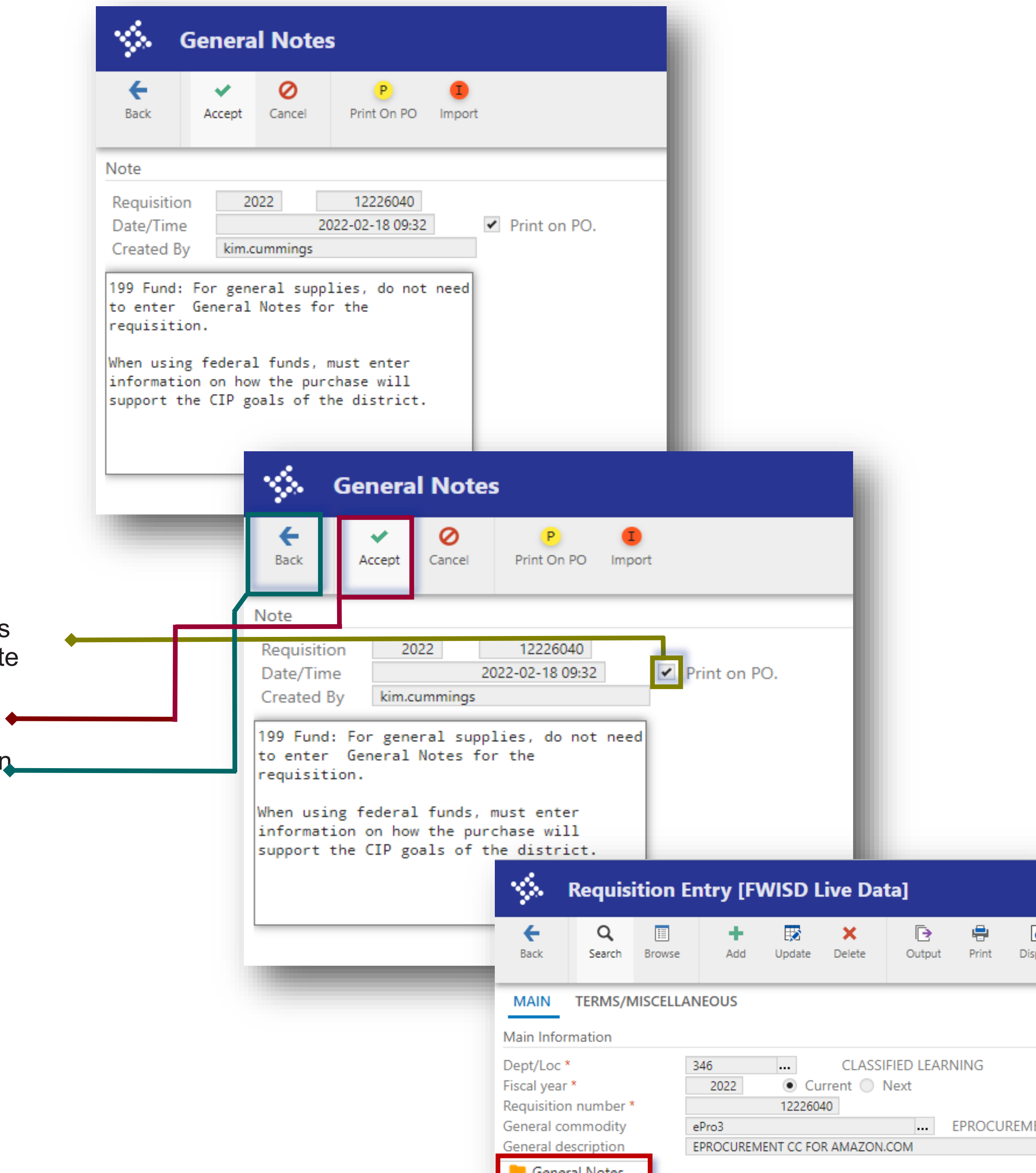
8TH STEP

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

Left-click on Accept.

Left-click on Back to return to the main page.

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



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.

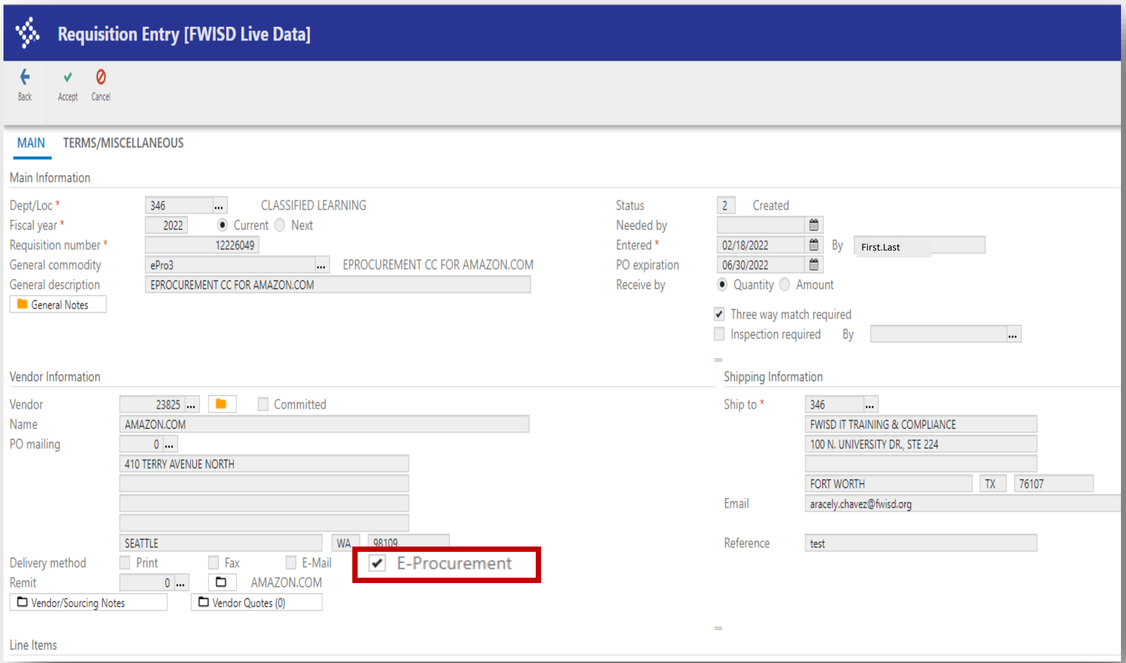
Rentals or Food: Name of the event or reason for the rental, the date of the rental, and the associated agenda.

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

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

9TH STEP

Press the tab key until you reach the Vendor Information. The vendor information will automatically populate based on the ePro General Commodity selected.



10TH STEP

Verify the E-Procurement box is checked

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

11TH 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.

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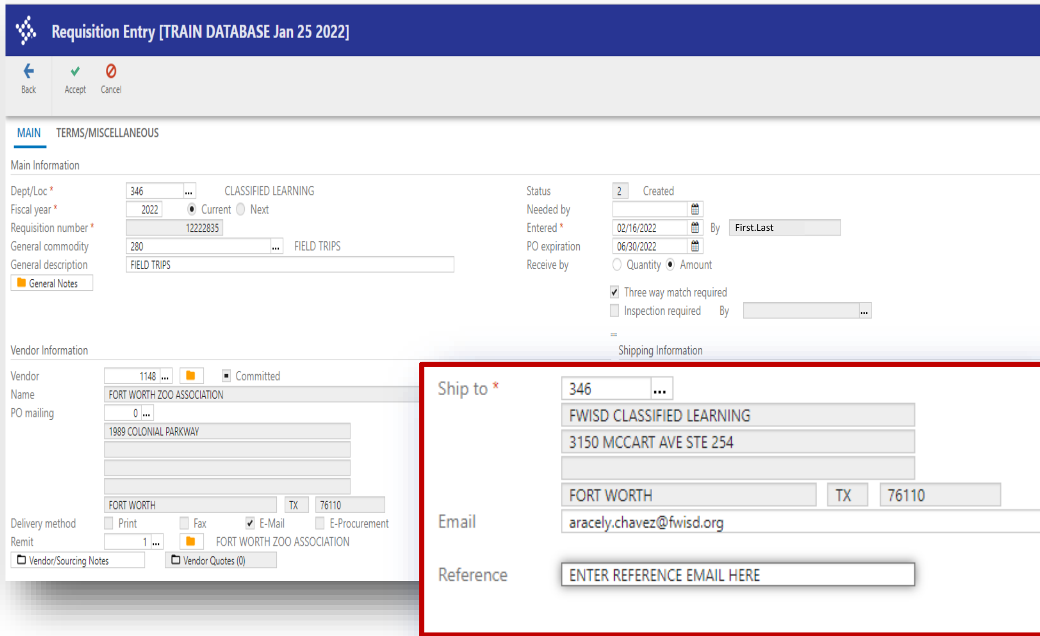
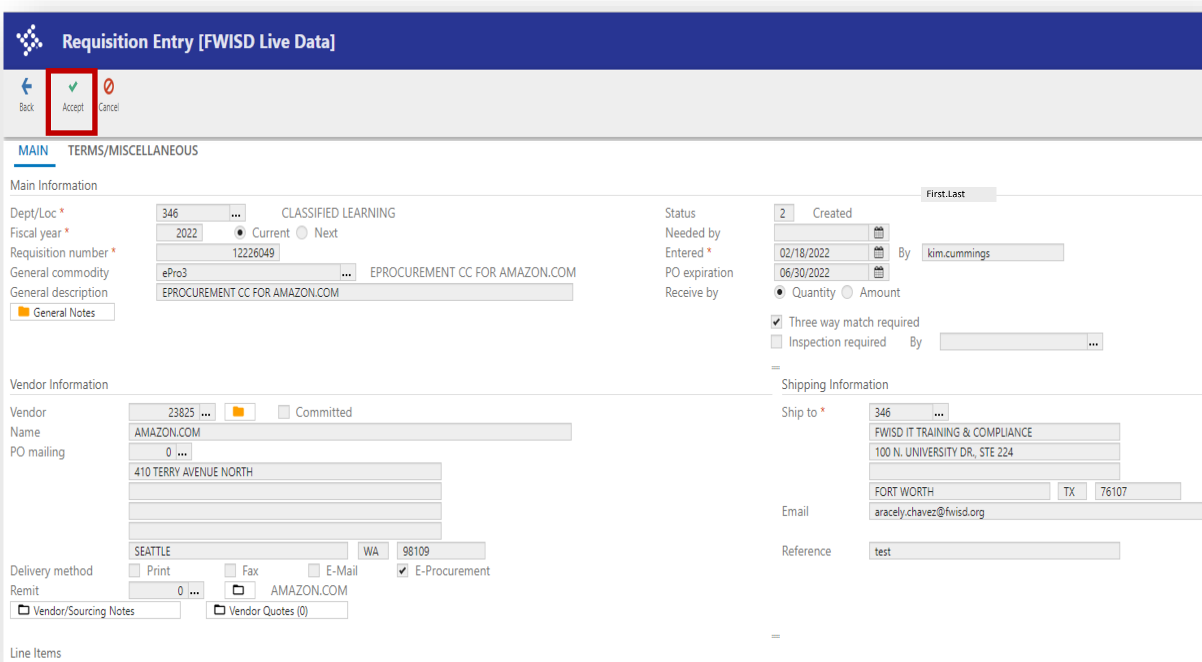


12TH STEP

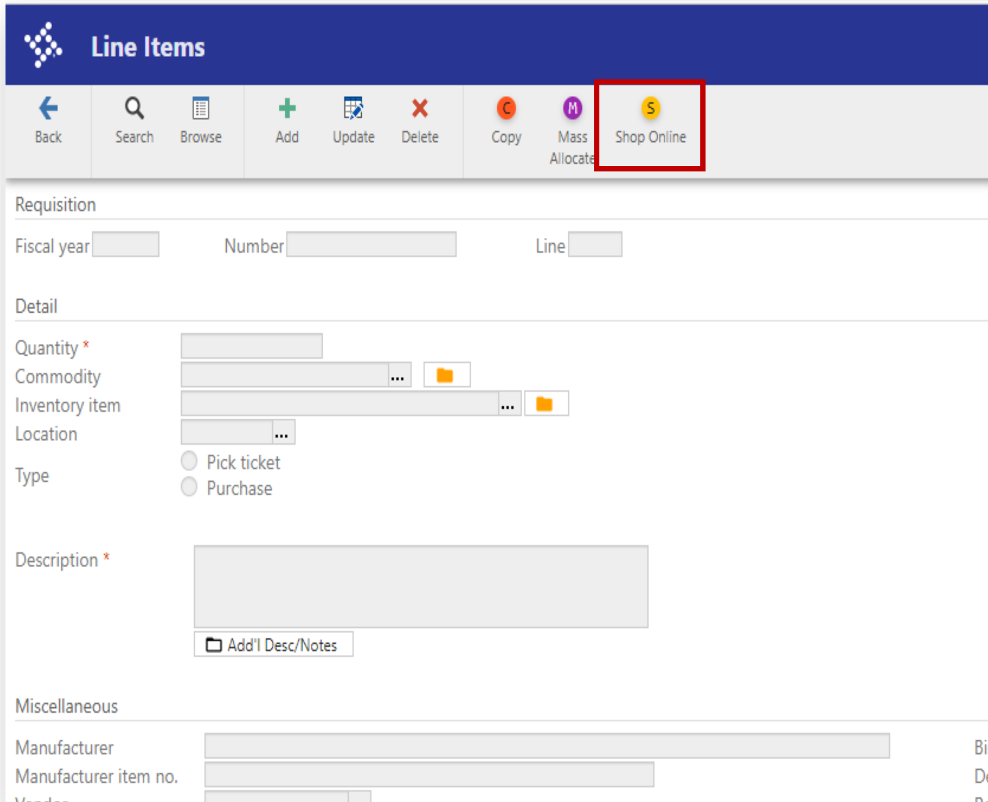
Click Accept.



13TH STEP

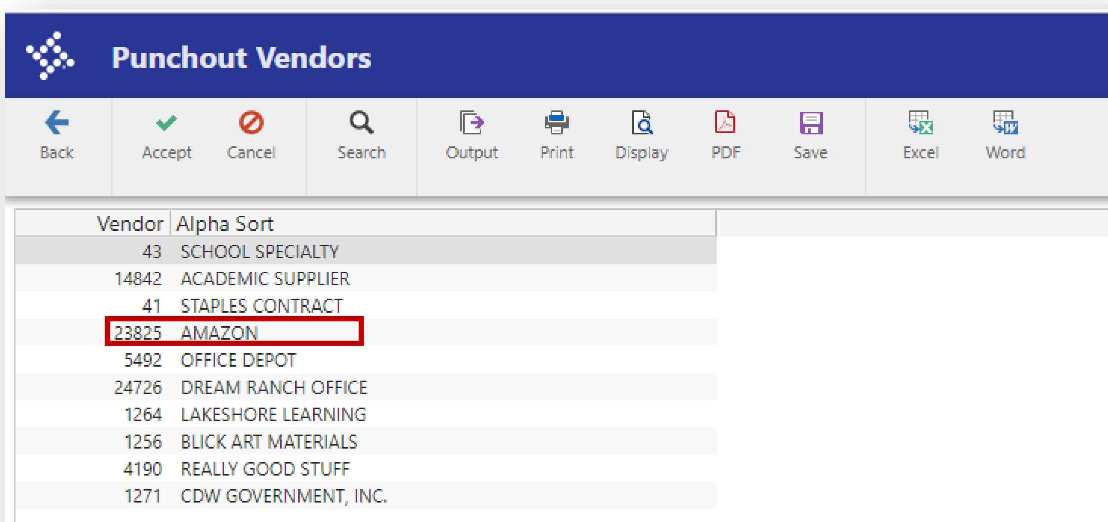
The Line Items window opens.

Click Shop Online



14TH STEP

Double click the ePro vendor to begin online shopping.

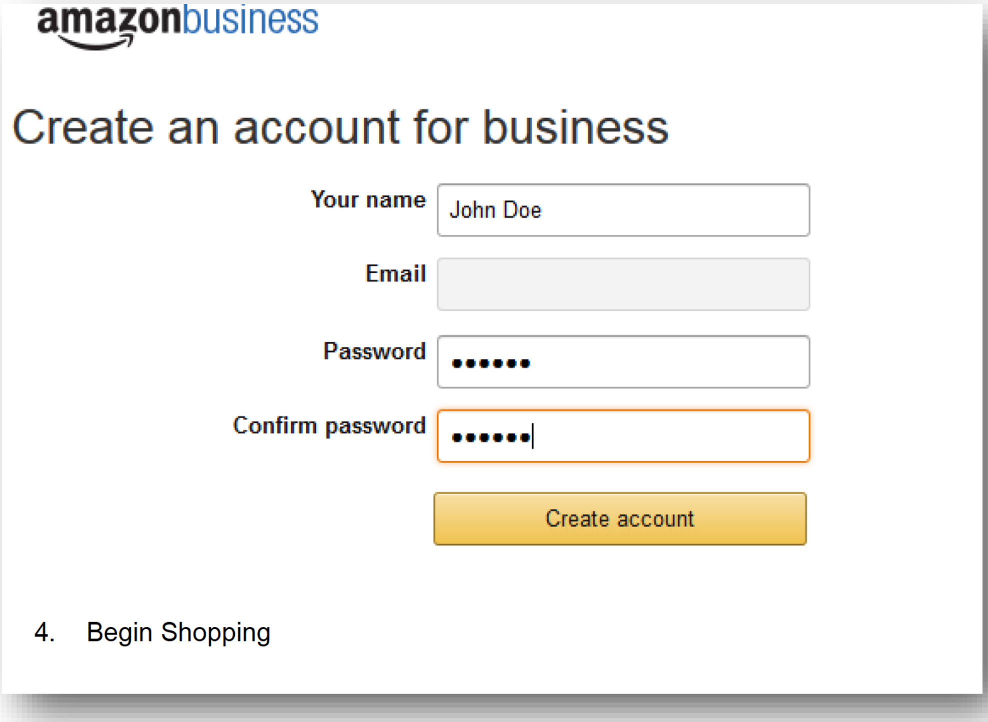


15TH STEP

The first time accessing Amazon for online shopping will require the end user to create a business account by entering name, emails and password.

An account only has to be created for Amazon. It will not be required for any other ePro vendor.

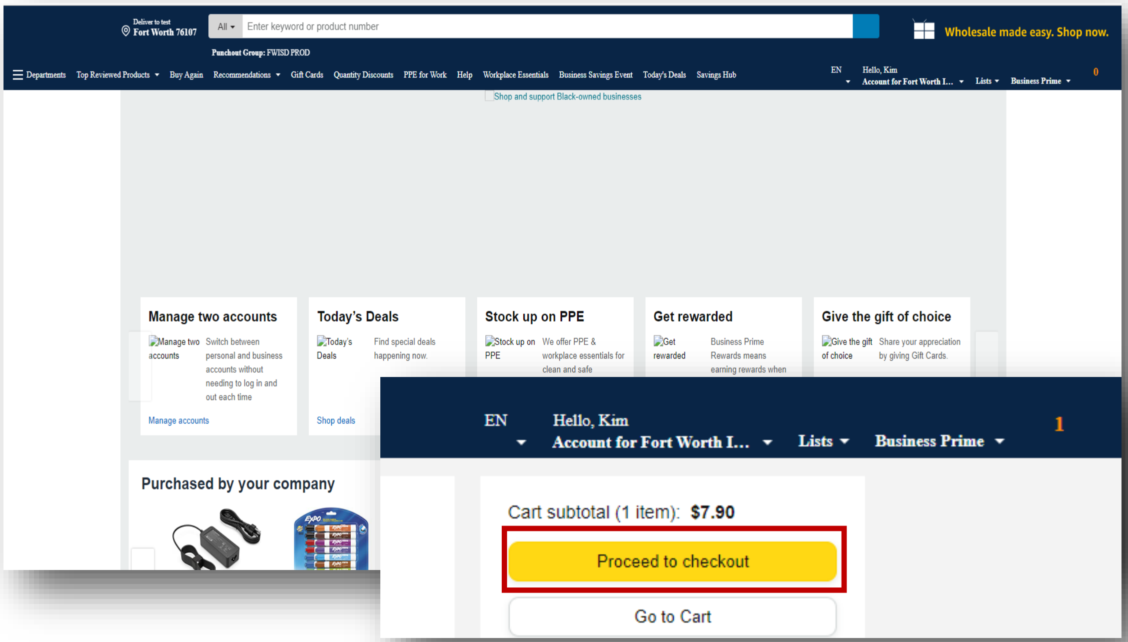
If the email and network login differ, use the network login to setup the account for Amazon.



16TH STEP

The Amazon main shopping page will open.

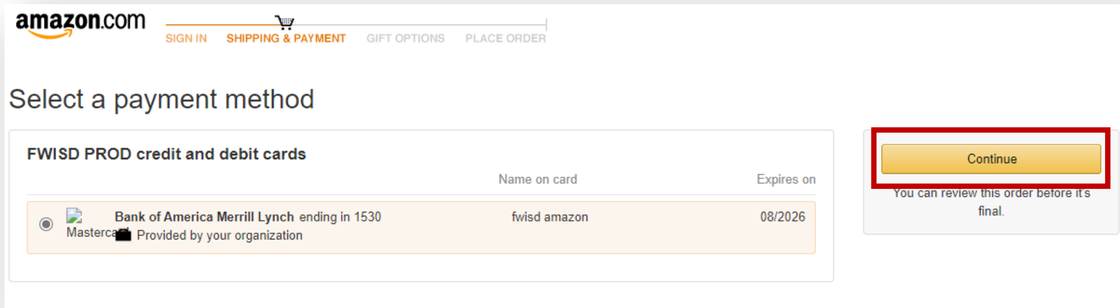
Choose your items and add to the cart. When finished, Select Proceed to Checkout.



17TH STEP

The Select a payment method window will display .

Click Continue

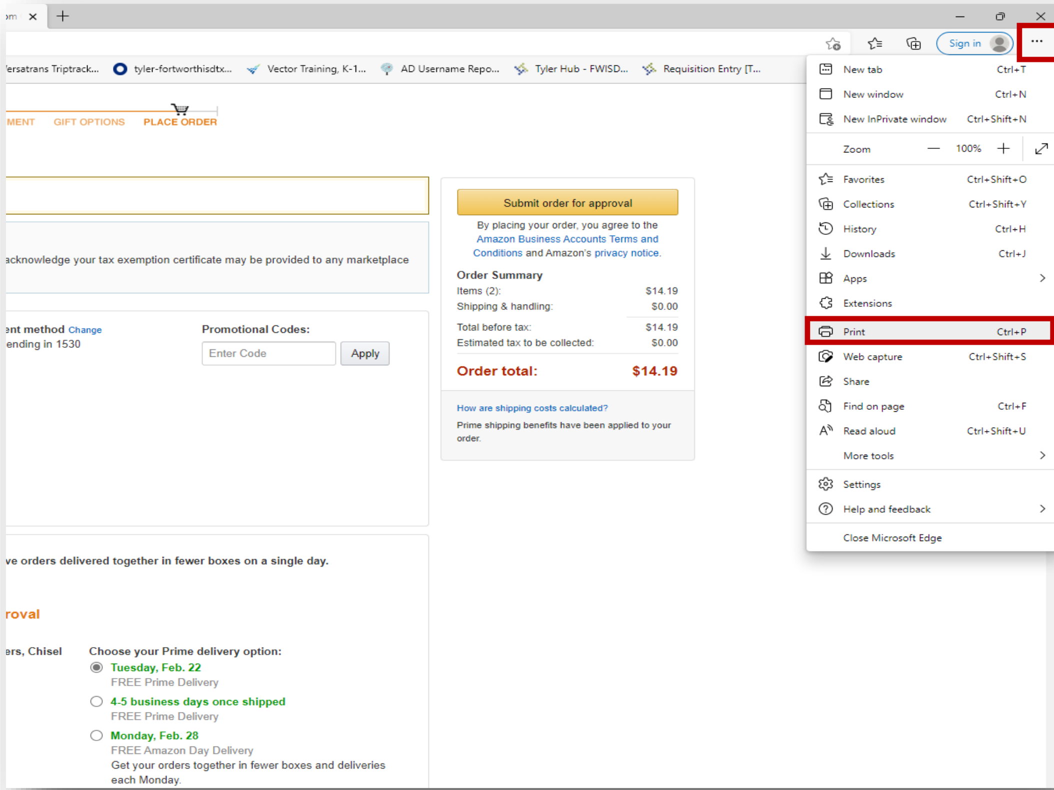


CREATE ATTACHMENT FOR REQUISITION

19TH STEP

With the Review your order screen open, click on Settings and More icon in the upper right corner of the screen.

Click Print.

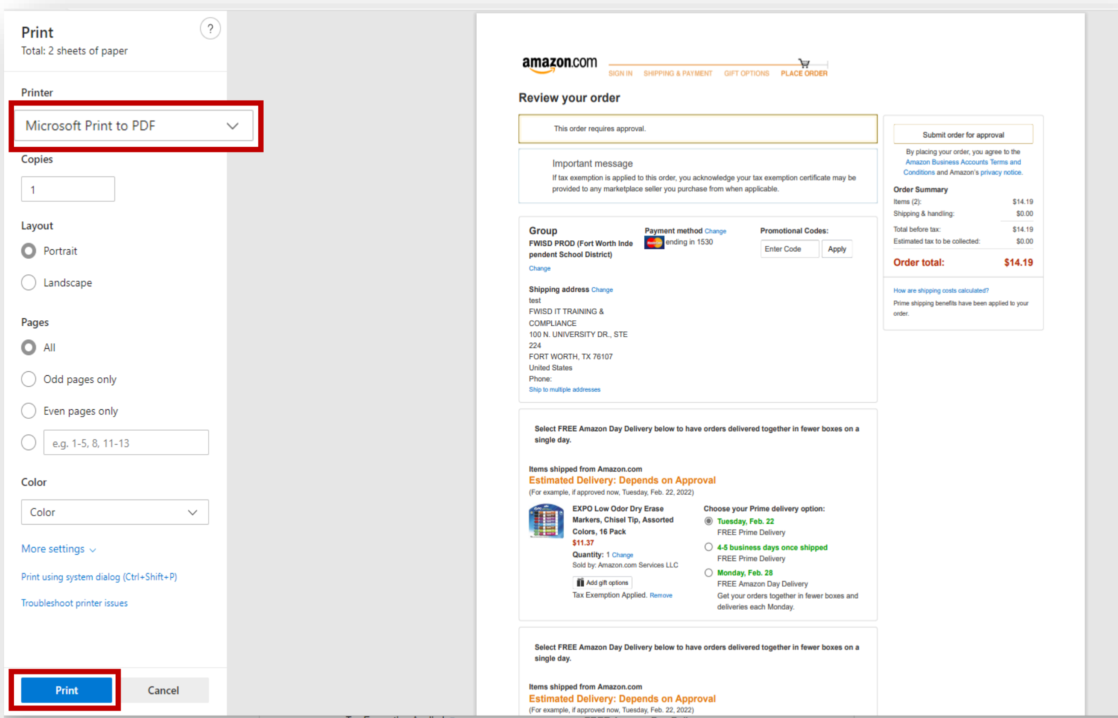


20TH STEP

The print window displays.

Select "Microsoft Print to PDF". This creates the pdf that will need to be attached to the req.

Click Print.

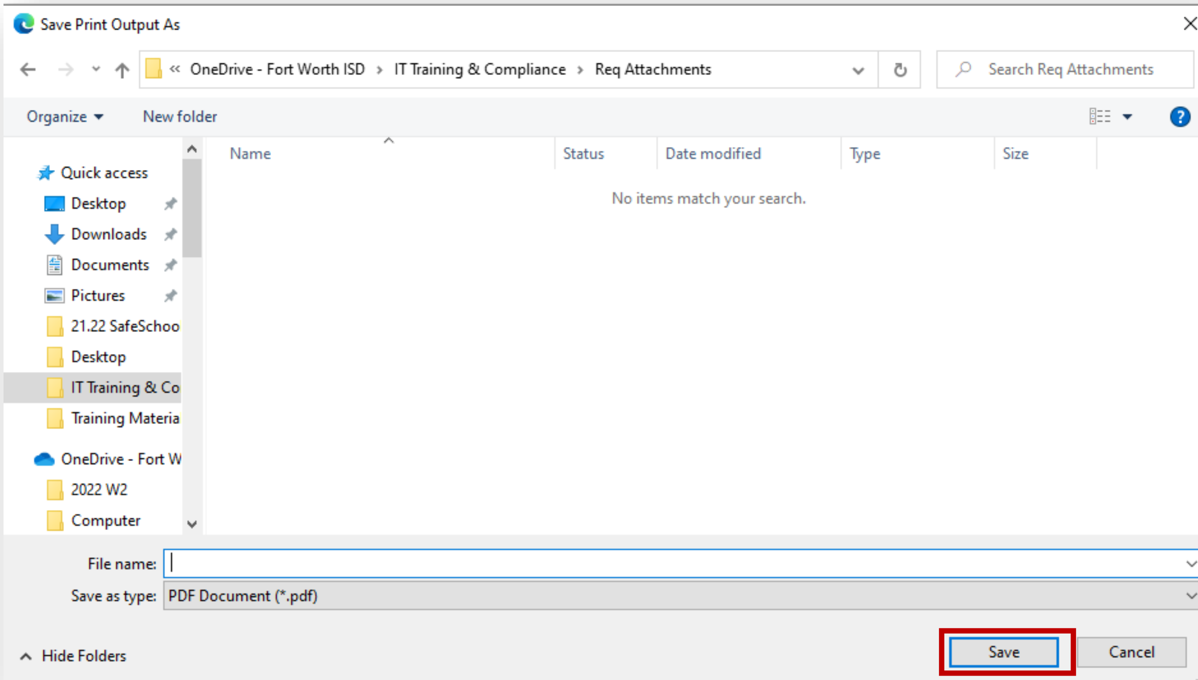


21ST STEP

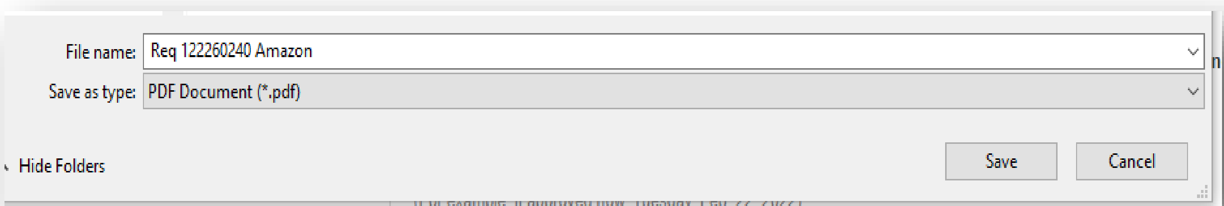
The Save Print Output As screen opens.

elect where the file will be saved. Enter a name for the file. Notice the "Save as type" is set to PDF Document (*.pdf)

Click Save



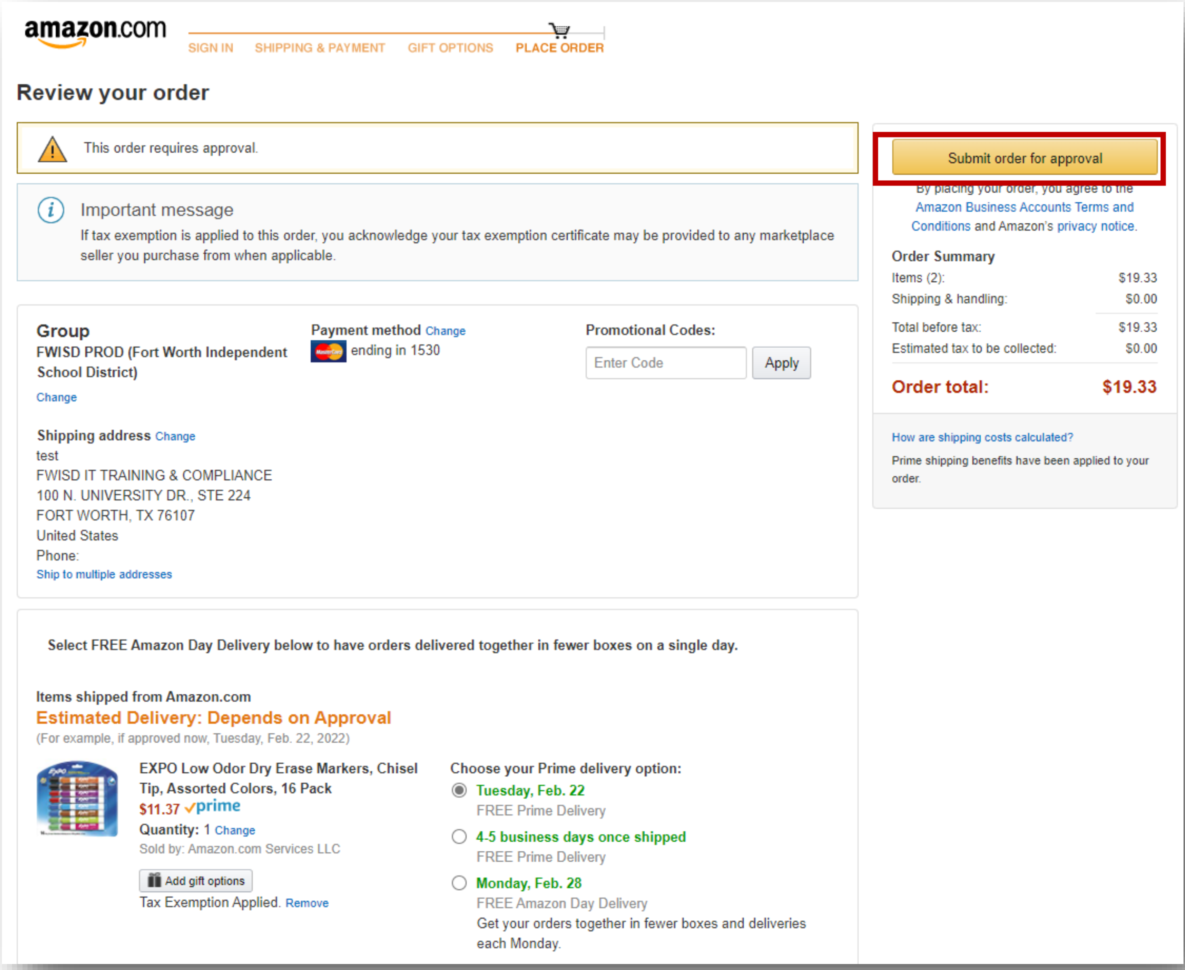
File name example



22ND STEP

Review your order screen window will display.

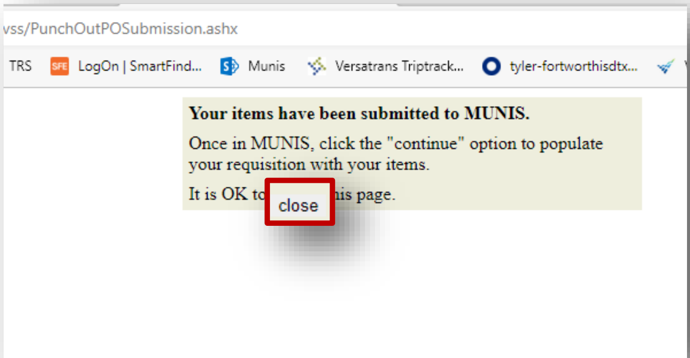
Select “Submit order for approval”.



23RD STEP

The screen displaying “Your items have been submitted to Munis” opens.

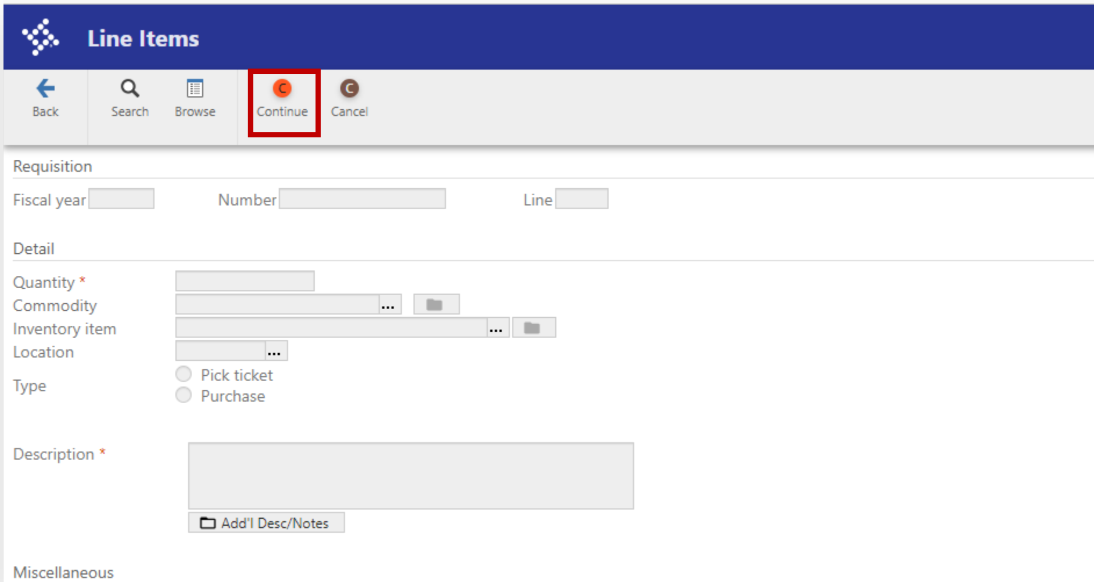
Click “close” in the dialogue box.



24TH STEP

A blank Line Items window displays.

Click Continue.

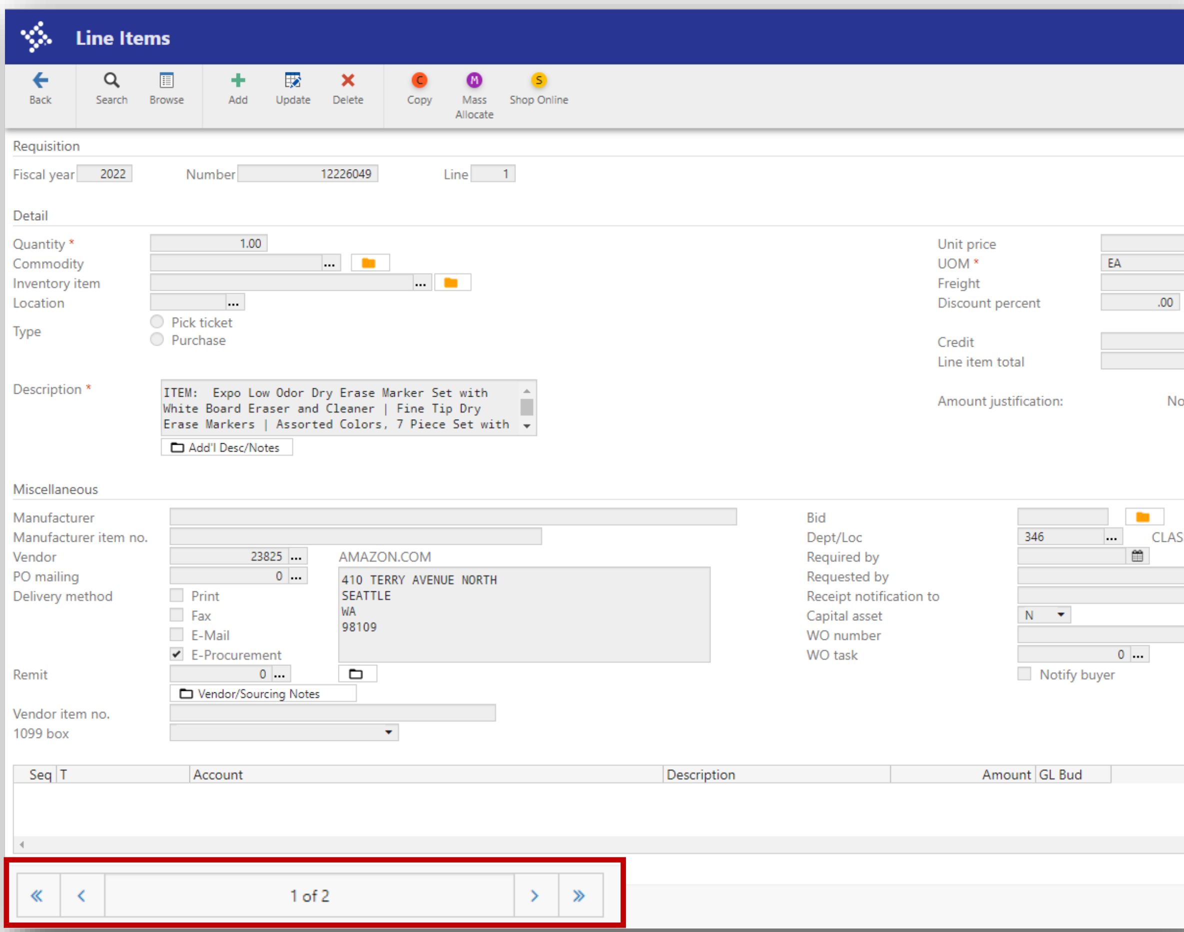


25TH STEP

The items from the cart will import into Munis .

Each item type will be a separate line. This will be indicated by the 1 of # at the bottom of the screen.

This information should match the cart pdf saved previously.



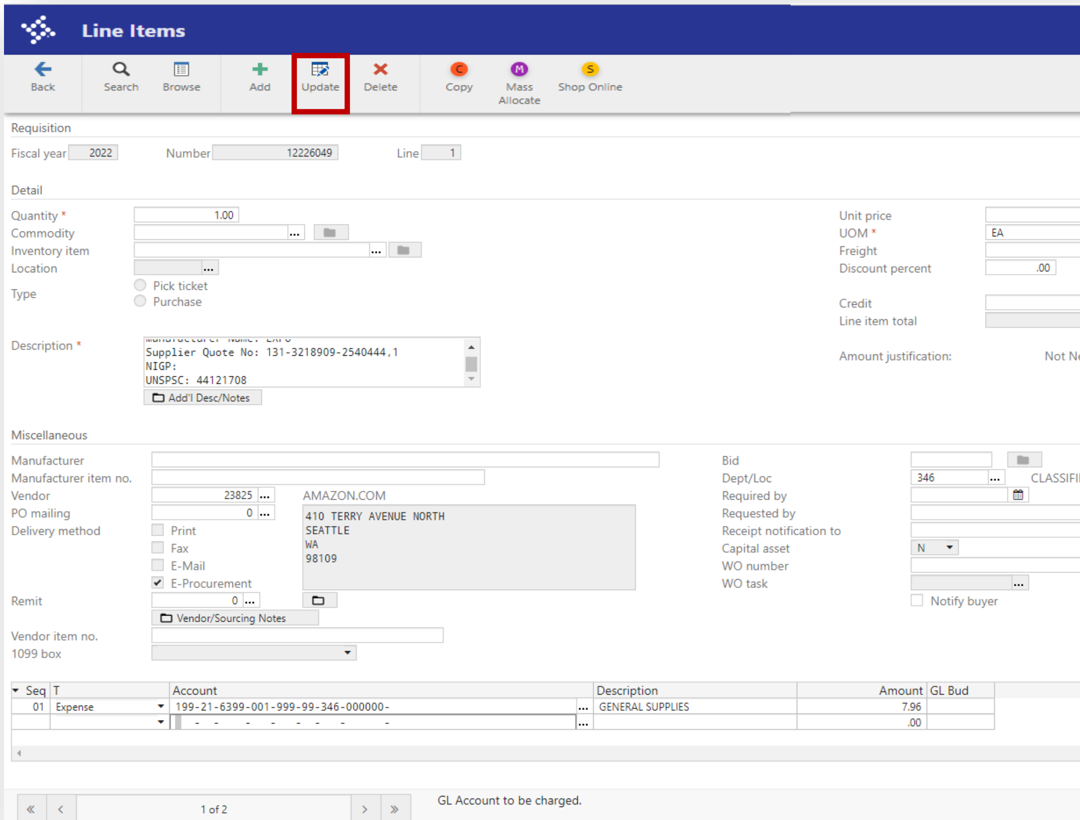
MANUAL UPDATE OF GL ACCOUNT

26TH STEP

Click Update and tab to the Account field at the bottom of the screen.

Click Accept.

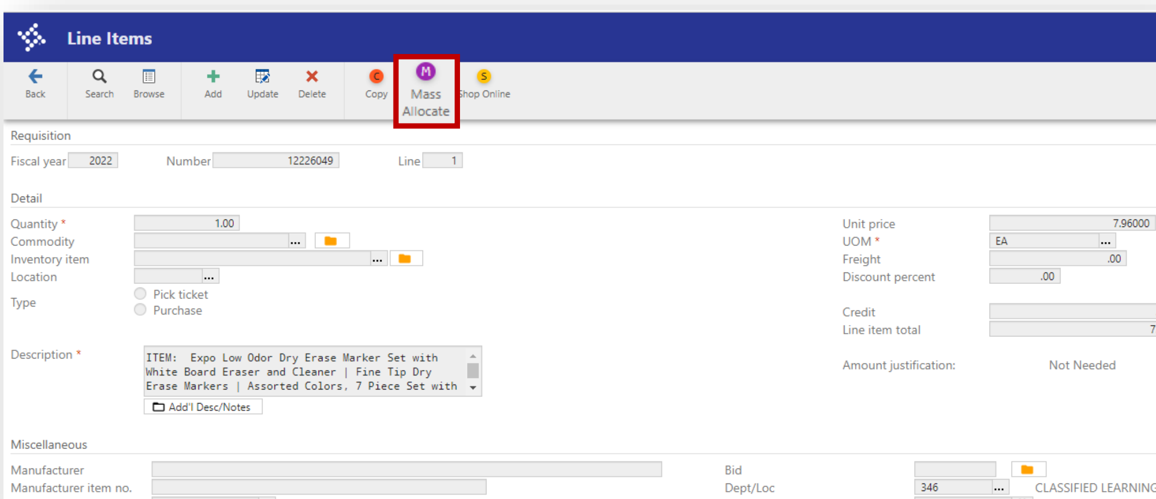
Scroll to the next line using the direction arrows at the bottom of the screen. Follow the same steps to update and enter the GL account.



MASS ALLOCATION OF GL ACCOUNT

27TH STEP

Click on Mass Allocate.

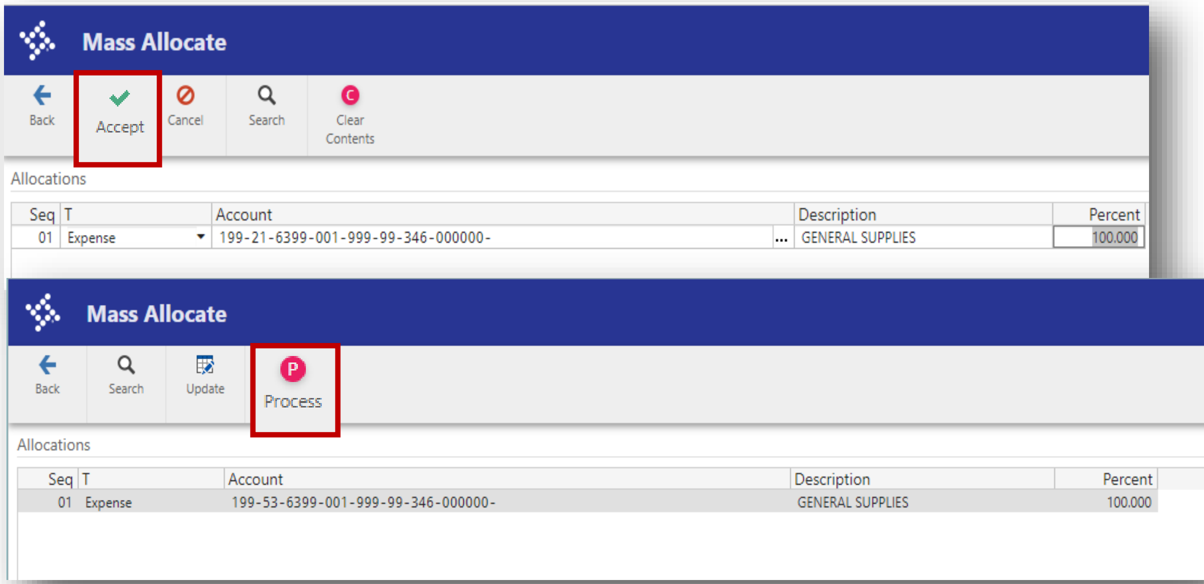


28TH STEP

The Mass Allocate screen opens. Enter the GL account, tab to Percent and the Description field should populate.

Click Accept.

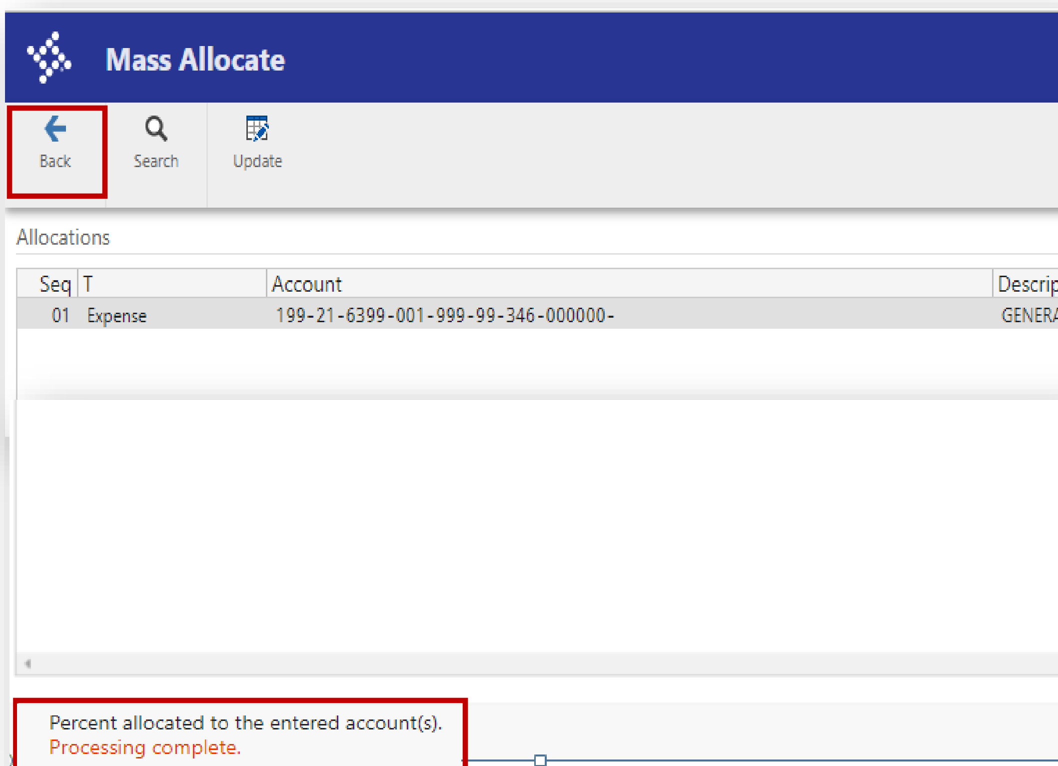
Click Process.



29TH STEP

The Processing Complete message appears at the bottom of the screen.

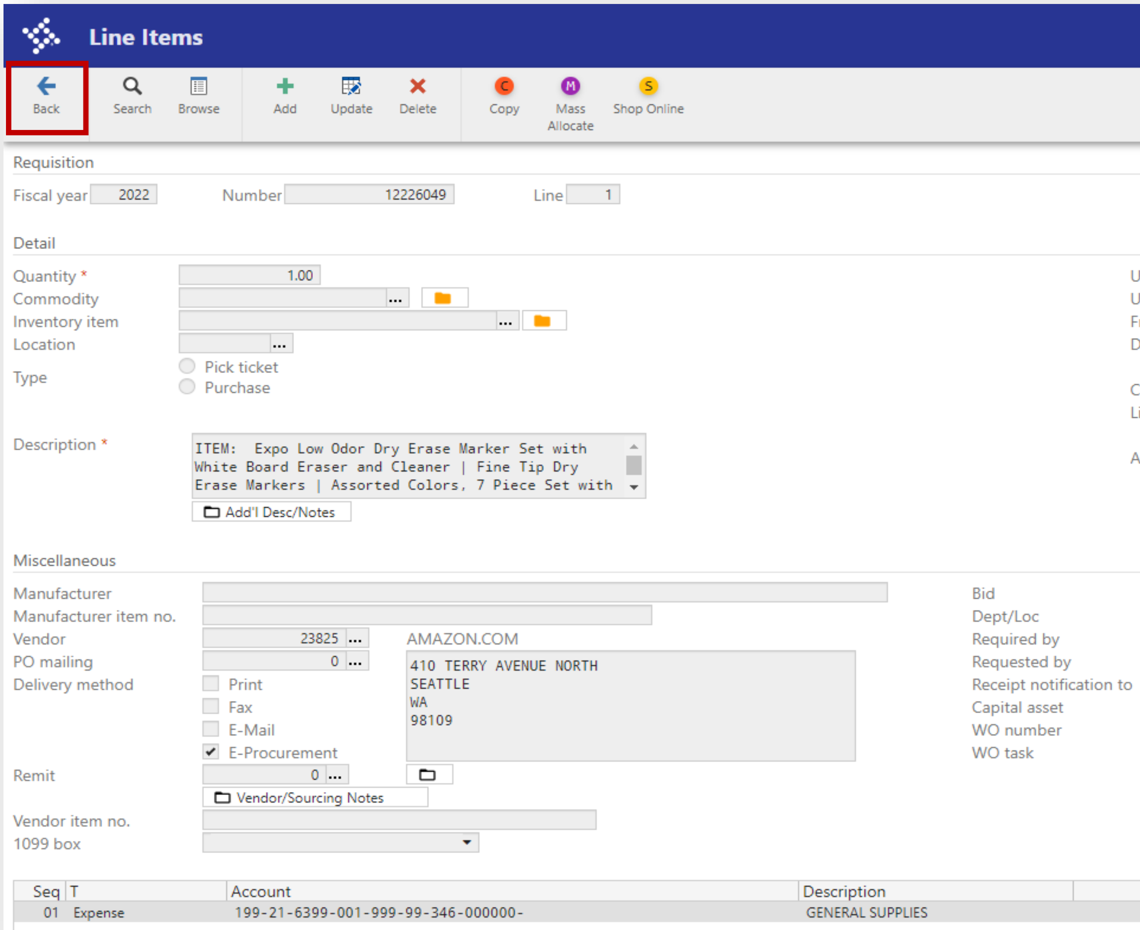
Click Back.



30TH STEP

The Line Items window will display

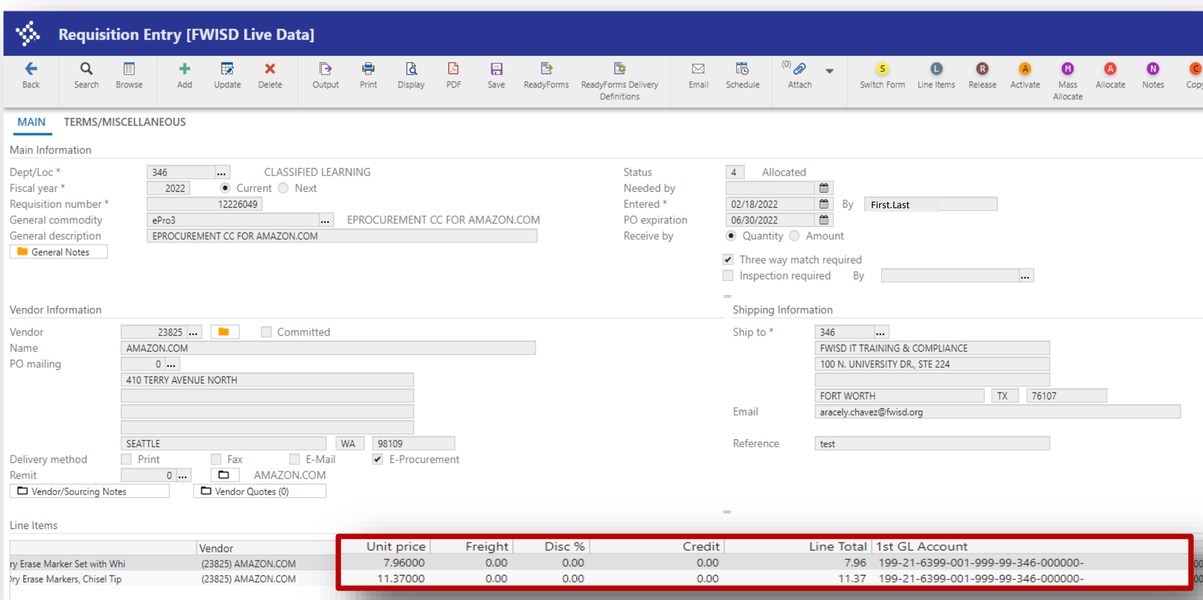
Click Back



31ST STEP

The main Requisition Entry screen will display.

Using the scroll bar at the bottom of the screen, scroll to the right and down to view the GL account has been applied to each line item.



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

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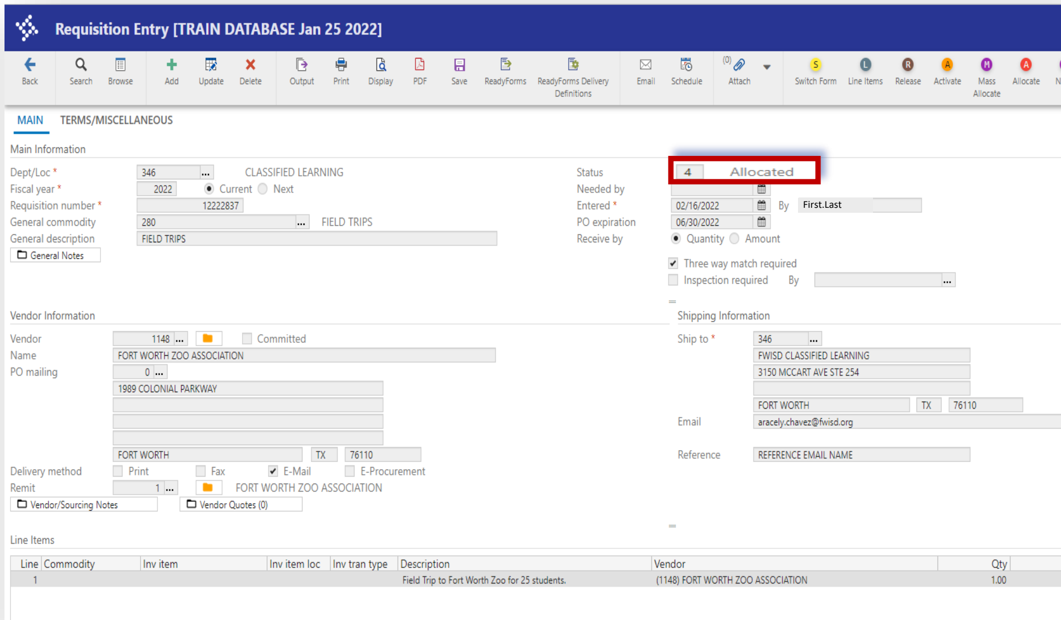
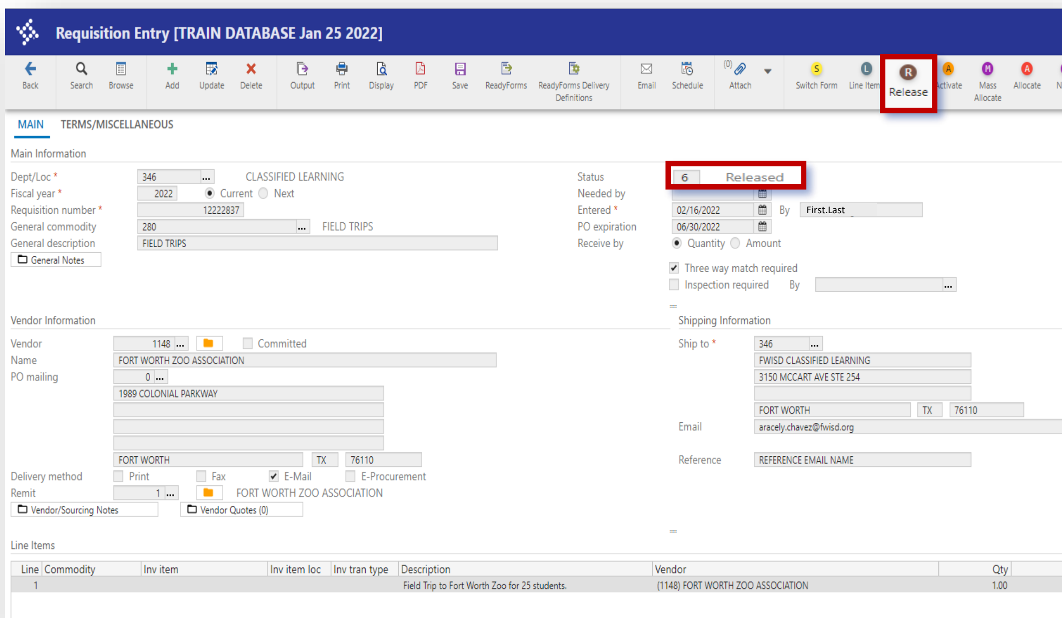


32ND STEP

Review the information and add attachments before releasing the requisition.

Click on Release

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

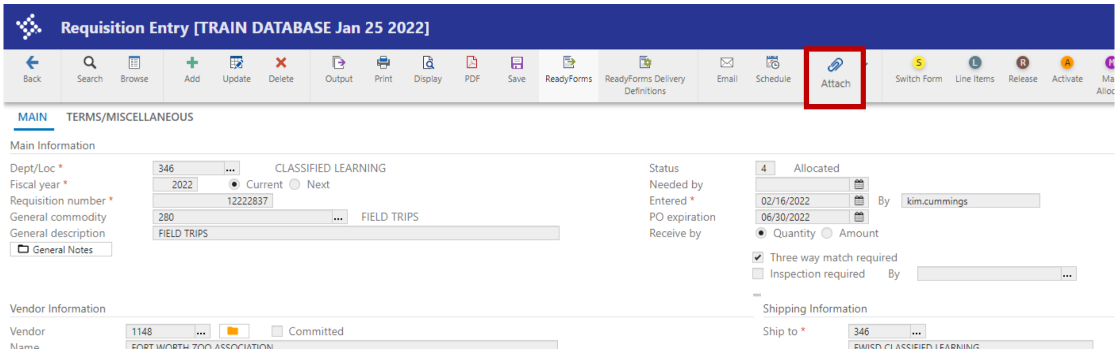


ATTACH DOCUMENTS TO YOUR REQUISITION

1ST STEP

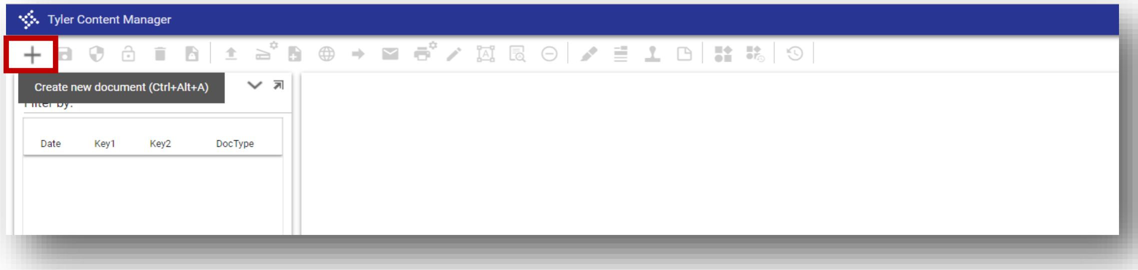
Attachments need to be added to the requisitions. These should be saved before this step.

Add an attachment by clicking on Attach.



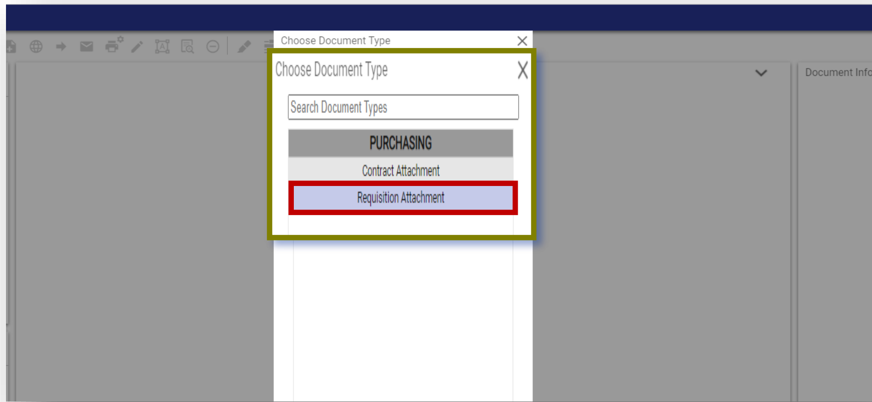
2ND STEP

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



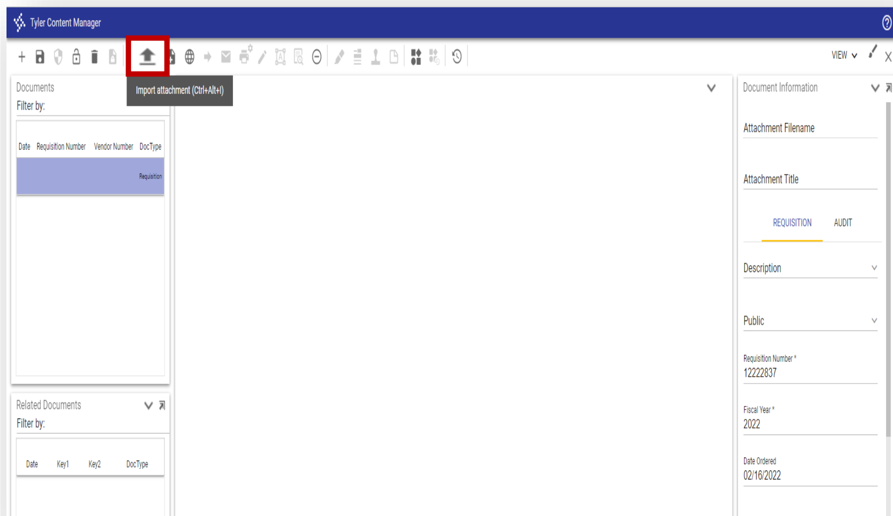
3RD STEP

Click Requisition Attachment



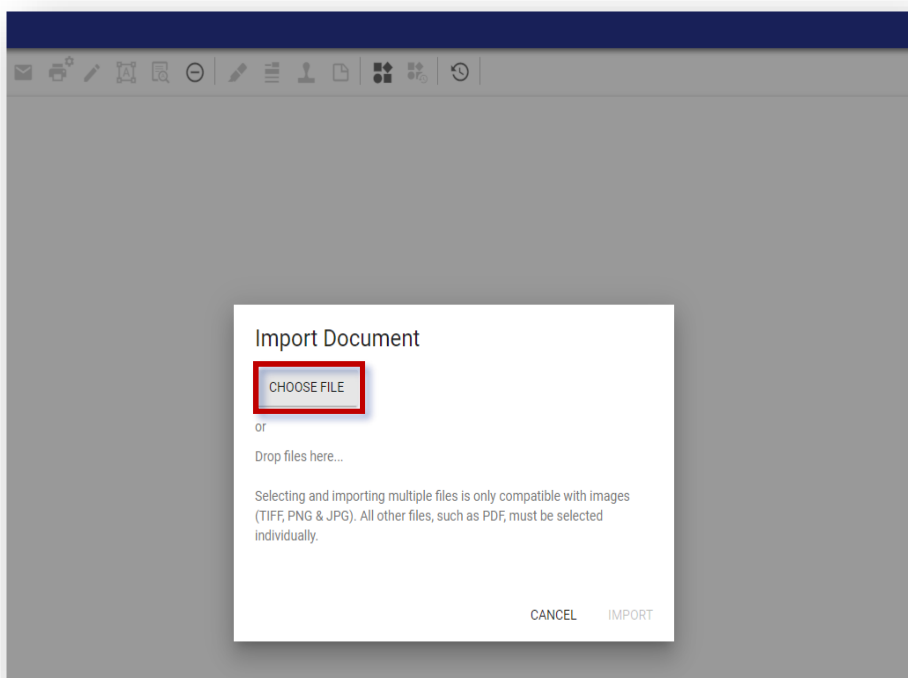
4TH STEP

Click on the arrow to import the attachment.



5TH STEP

The Import Document window opens.

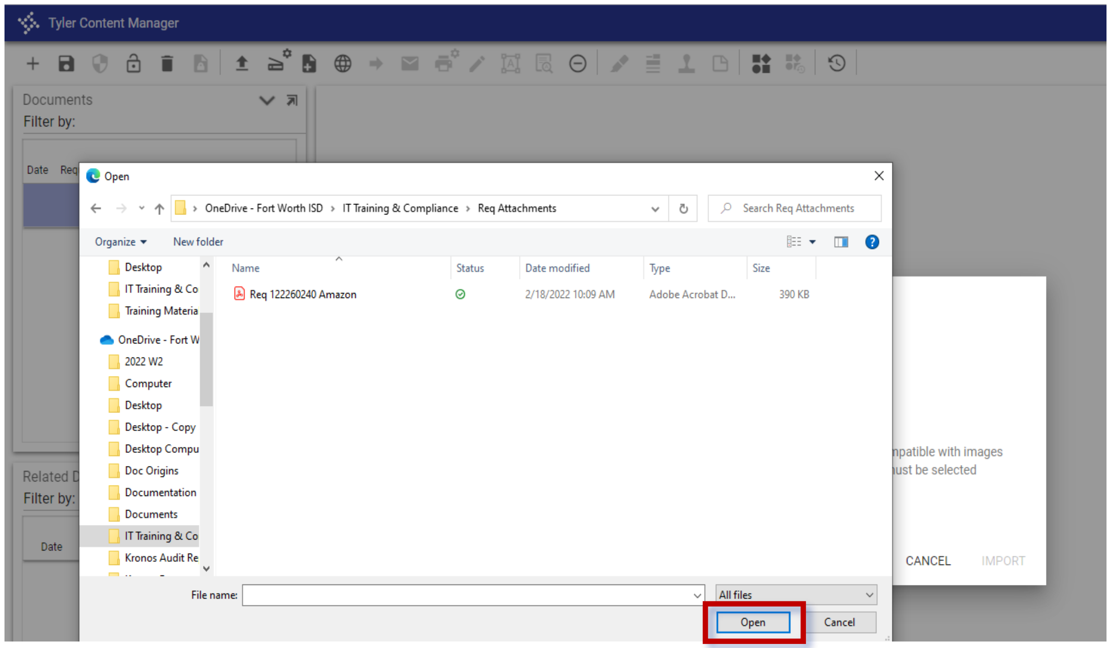


6TH STEP

The File Explorer window opens.

Locate and click on the file.

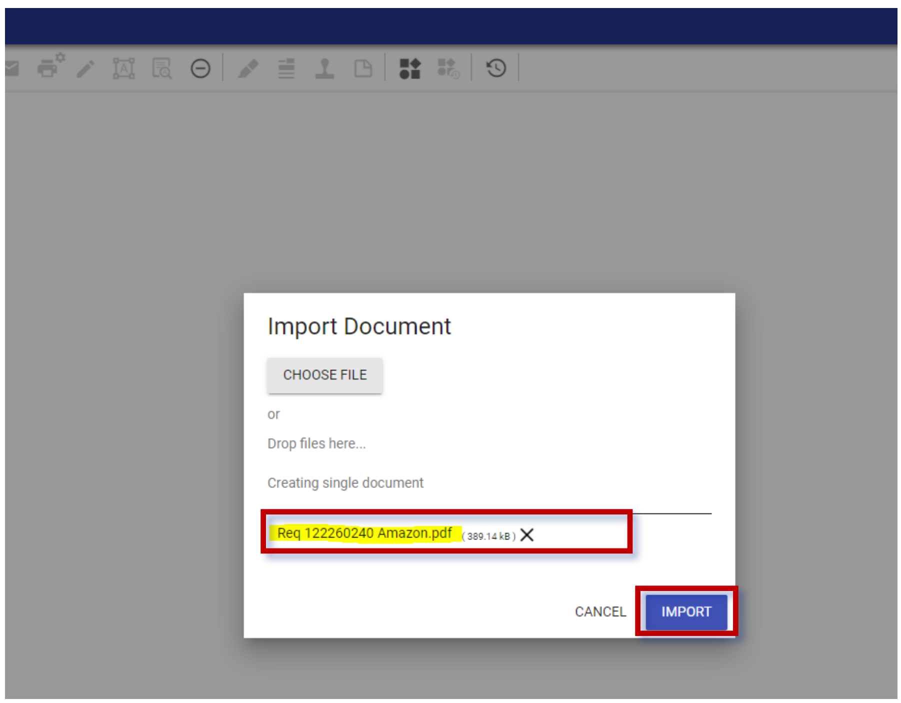
Click Open.



7TH STEP

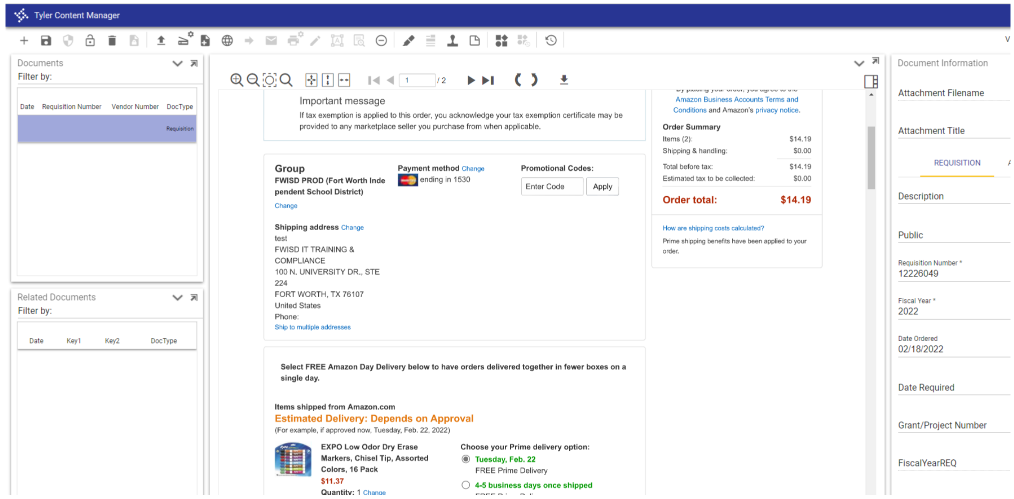
The uploaded filename will display in the Import Document window underneath the line.

Click Import.



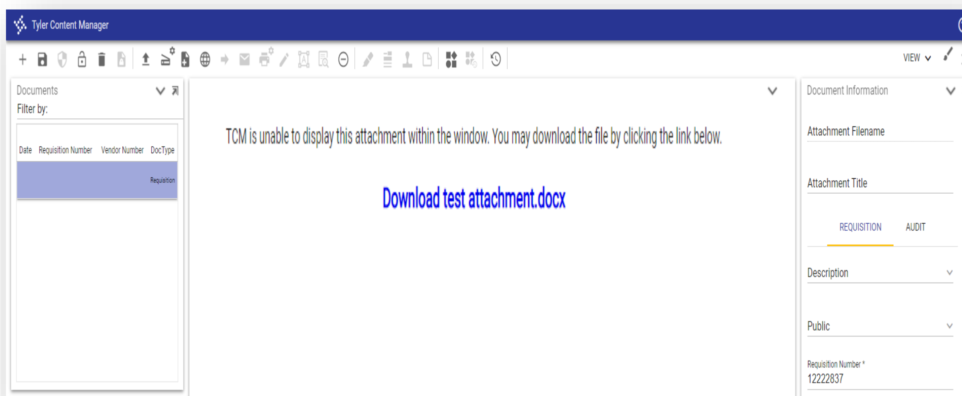
8TH STEP

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.

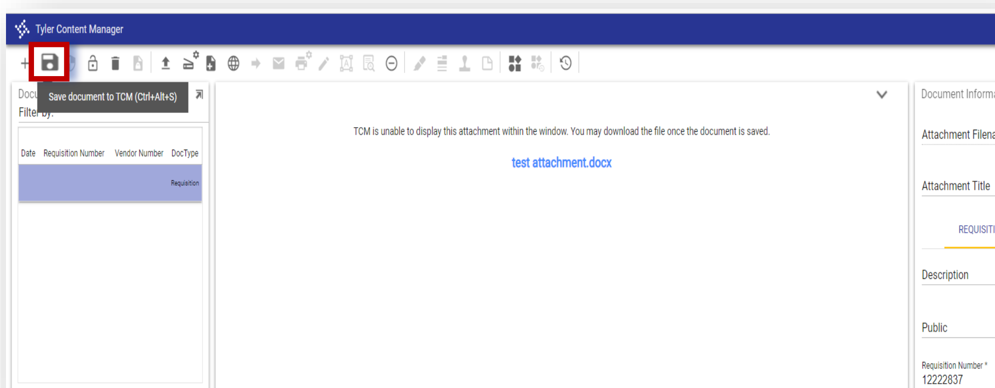
In order to view the file, click the download link in the middle of the window.



9TH STEP

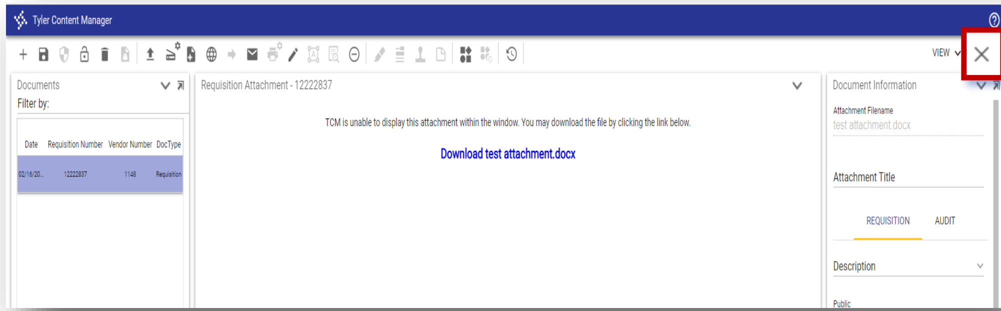
Click on the Save button.

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



10TH STEP

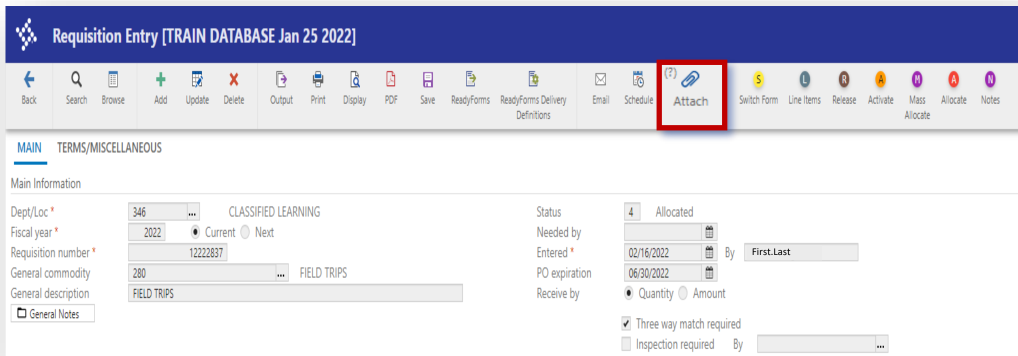
Click the X in the right corner to close the TCM viewer.



Informational:

The number of attachments will display next to the paperclip.

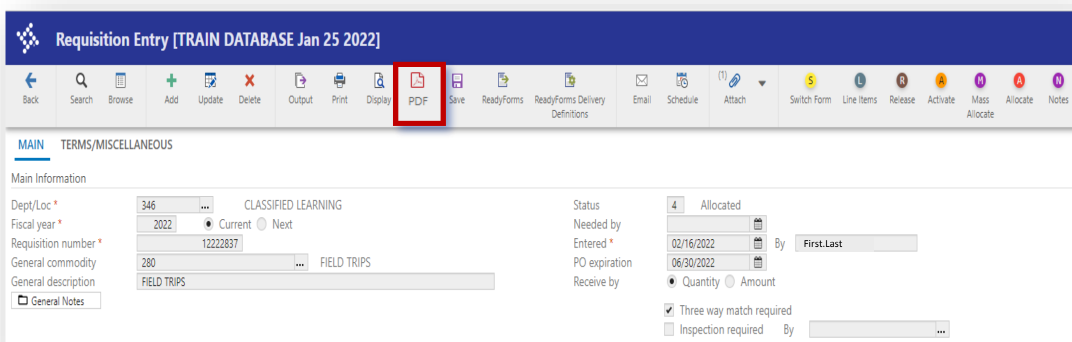
If the number is a question mark, don't worry, it still recognizes that there is an attachment.



PRINT REQUISITION—OPTIONAL

1ST STEP

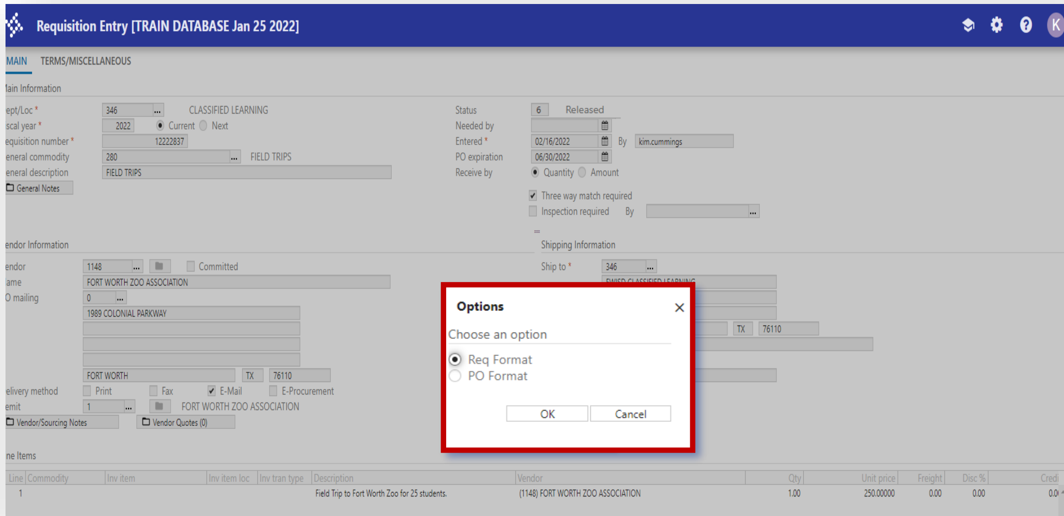
Click on PDF.



2ND STEP

The Options window opens.

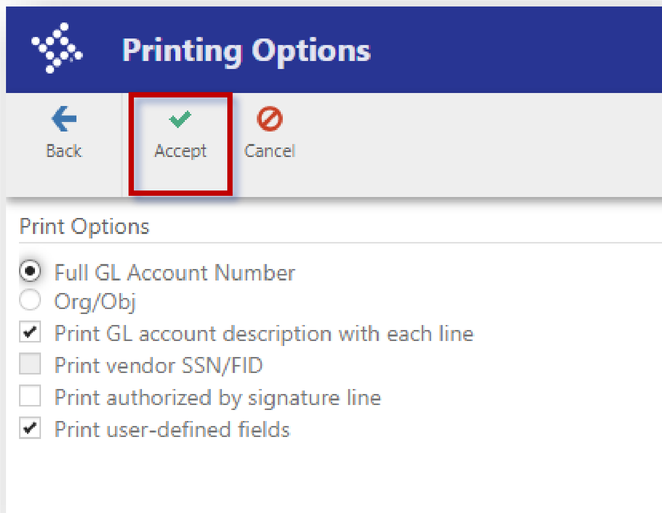
Choose Req Format



3RD STEP

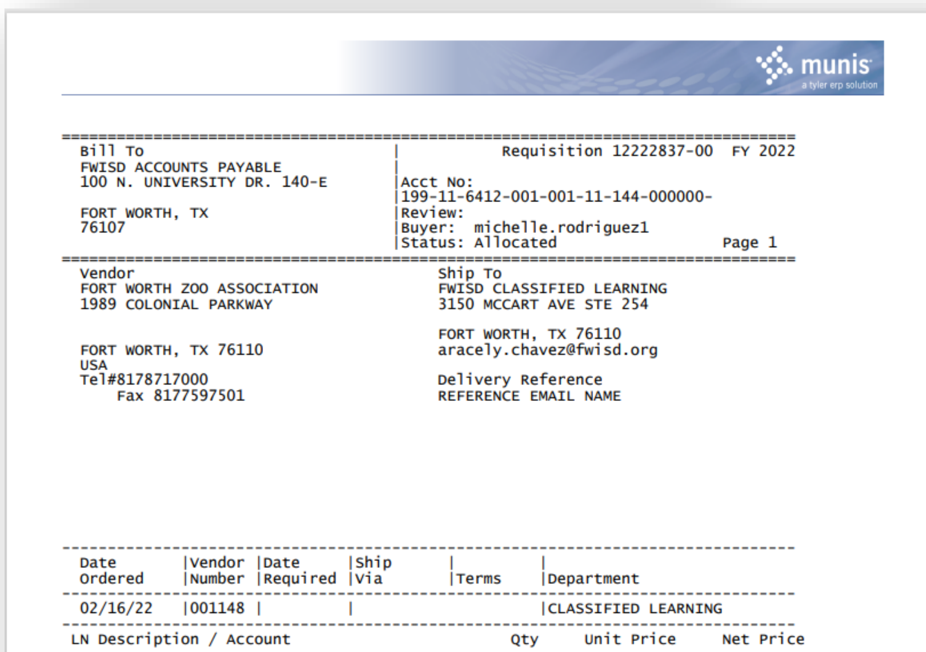
The Printing Options window opens.

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.



munis
a tyler erp solution

Bill To | Requisition 12222837-00 FY 2022
FWISD ACCOUNTS PAYABLE
100 N. UNIVERSITY DR. 140-E | Acct No:
| 199-11-6412-001-001-11-144-000000-
FORT WORTH, TX | Review:
76107 | Buyer: michelle.rodriguez1
| Status: Allocated Page 1

Vendor
FORT WORTH ZOO ASSOCIATION
1989 COLONIAL PARKWAY

FORT WORTH, TX 76110
USA
Tel#8178717000
Fax 8177597501

Ship To
FWISD CLASSIFIED LEARNING
3150 MCCART AVE STE 254

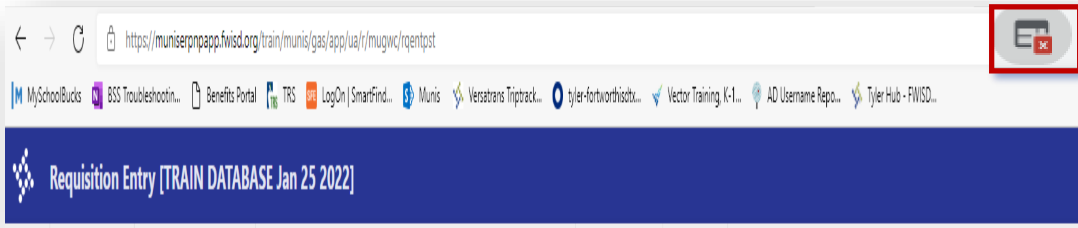
FORT WORTH, TX 76110
aracely.chavez@fwisd.org

Delivery Reference
REFERENCE EMAIL NAME

Date Ordered	Vendor Number	Date Required	Ship Via	Terms	Department
02/16/22	001148				CLASSIFIED LEARNING

LN Description / Account Qty Unit Price Net Price

POP-UP BLOCKED

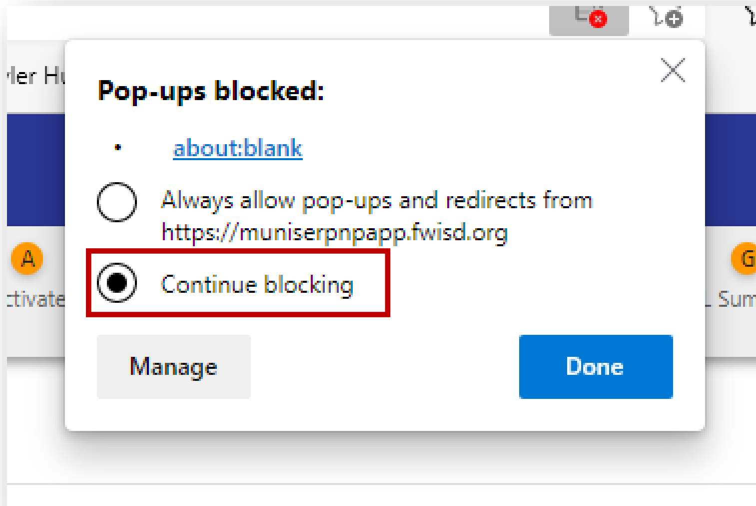


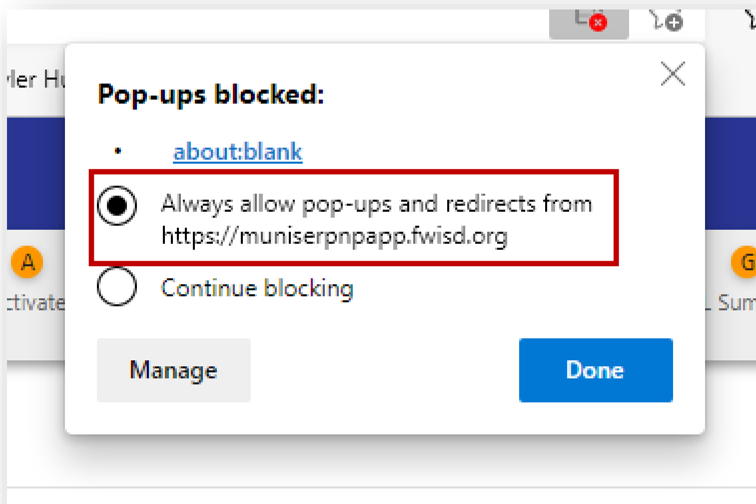
If the PDF does not open on the screen or it does not show ready to open in the upper right corner, the pdf has been blocked.

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://muniserpapp.fwisd.org”

Click Done



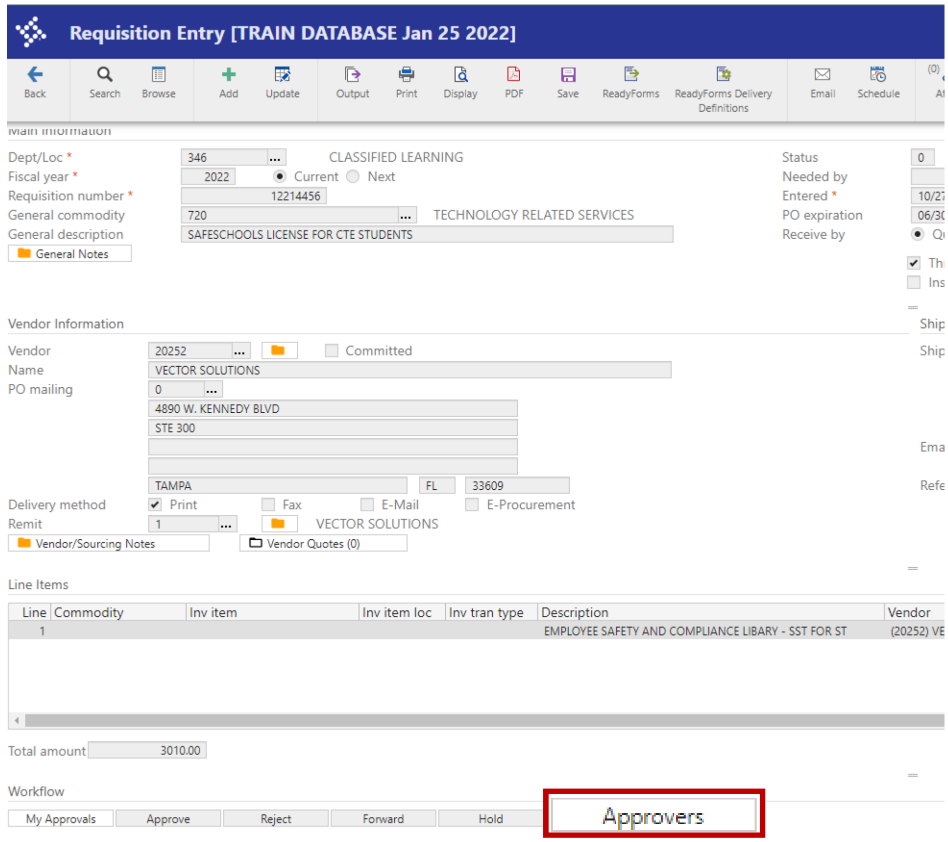


LOOK UP THE APPROVERS FOR THE REQUISITION

1ST STEP

Click on Approvers.

The Work Flow Status window opens.



2ND STEP

Click Expand All.

A list of approvers will display.

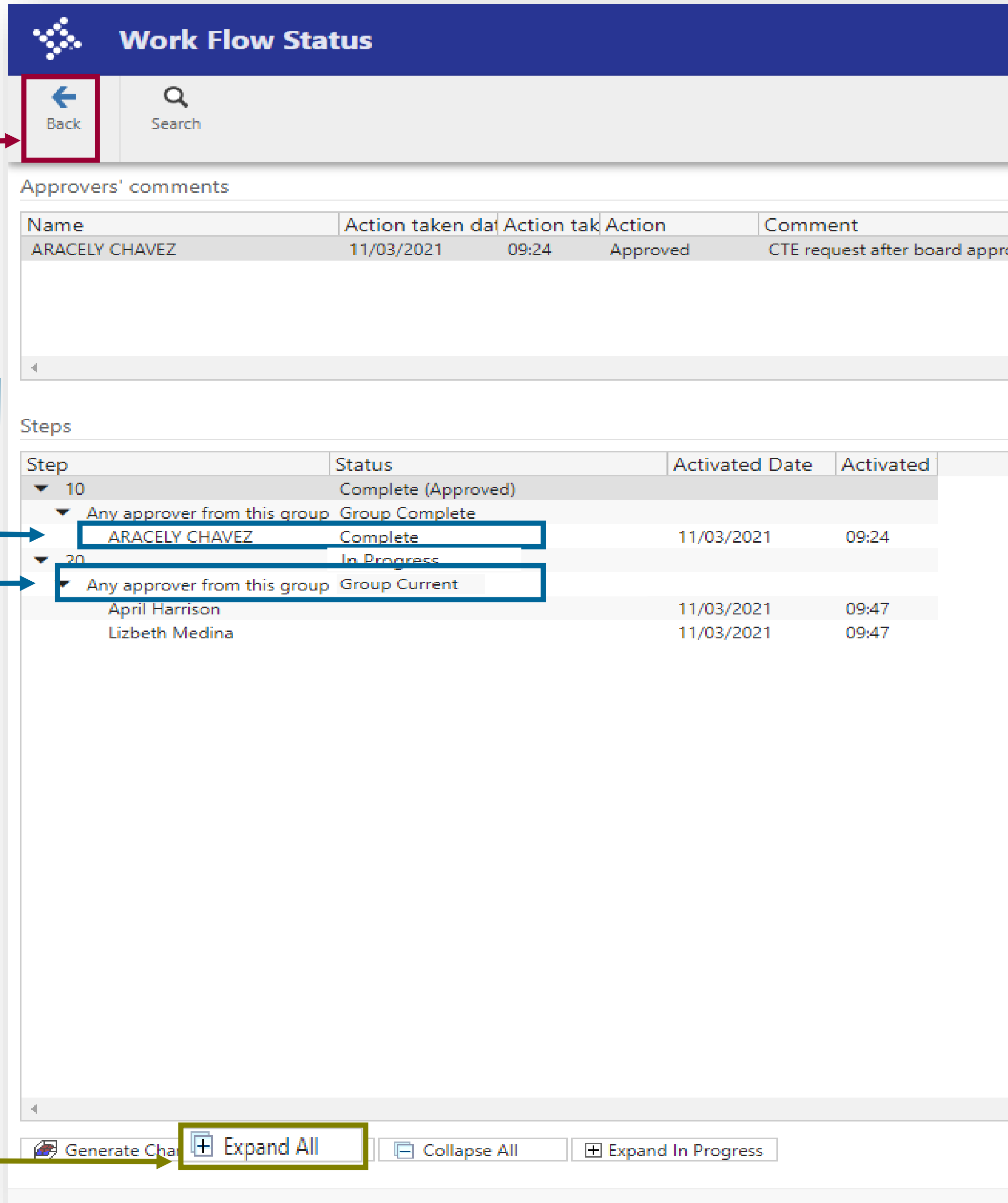
There are reqs that will have multiple approval levels as in the example.

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!

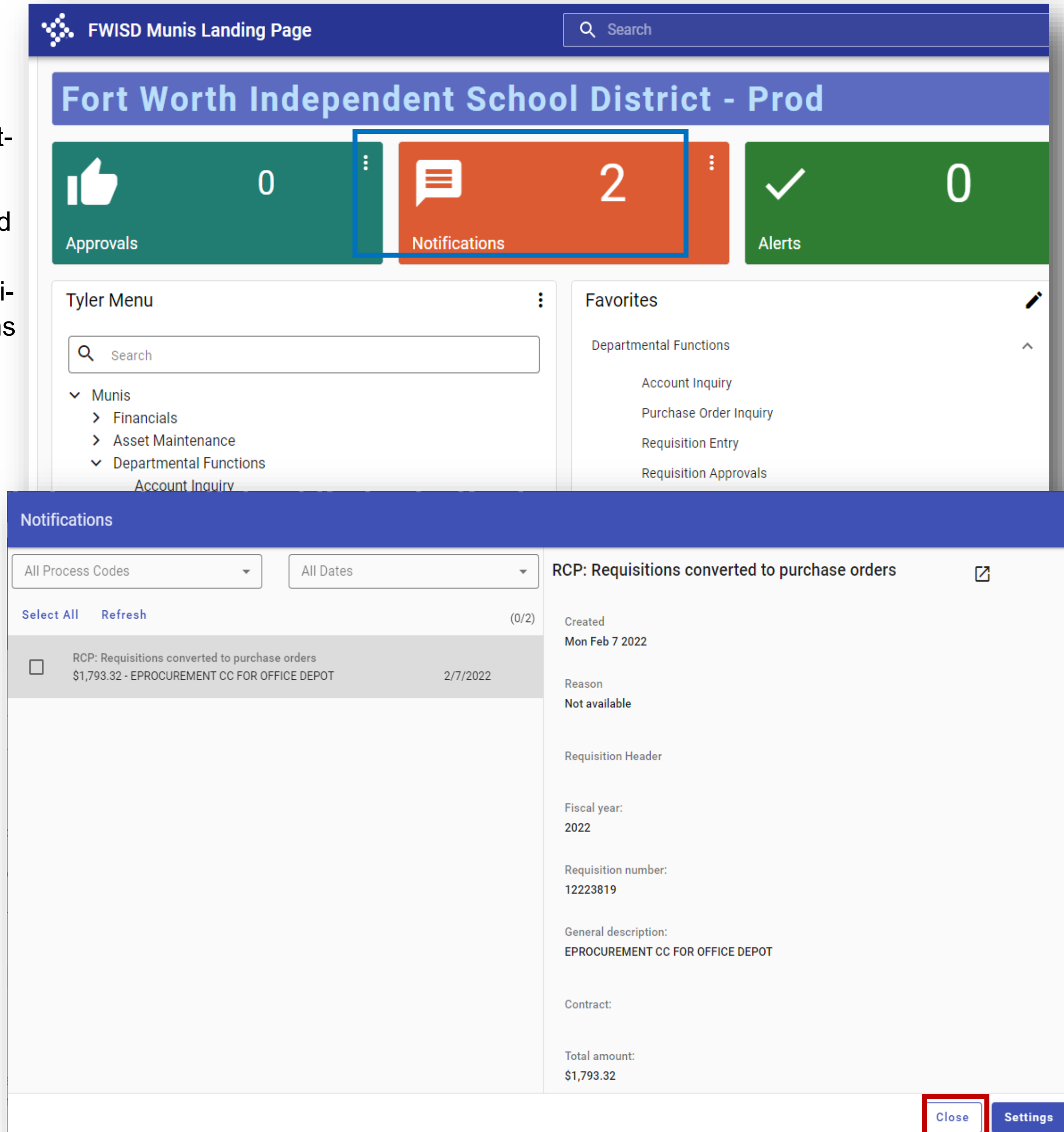


NOTIFICATIONS

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.



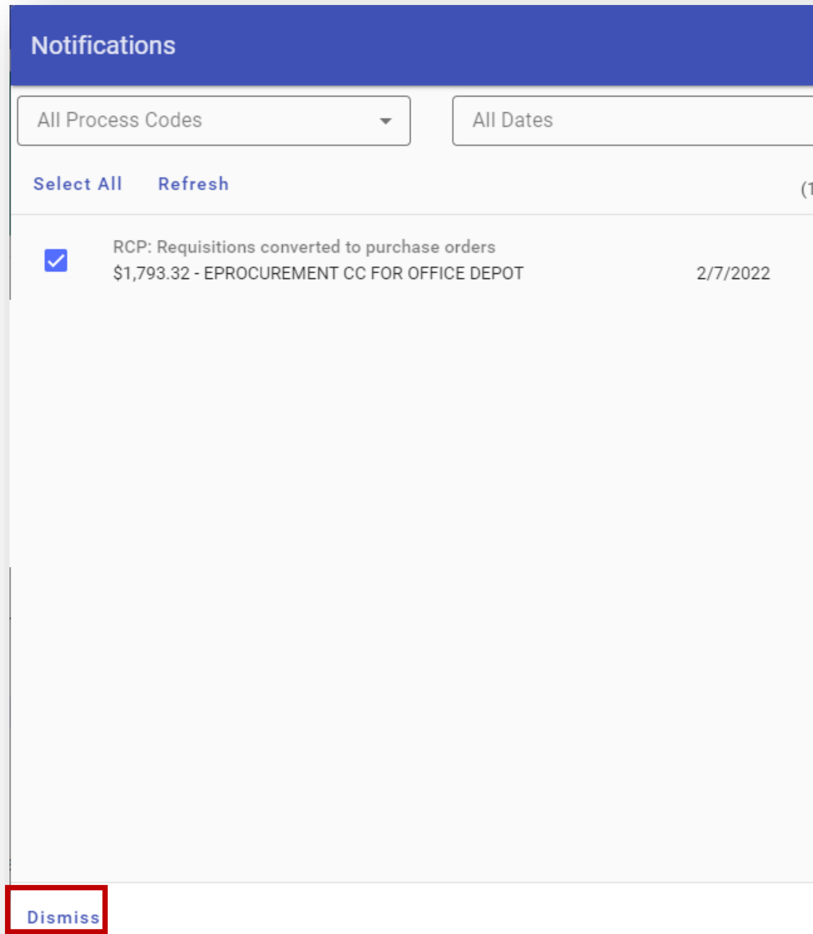
The option to Dismiss the notification is available by clicking on the check-box to the left of the requisition information.
Click Dismiss at the bottom of the screen.

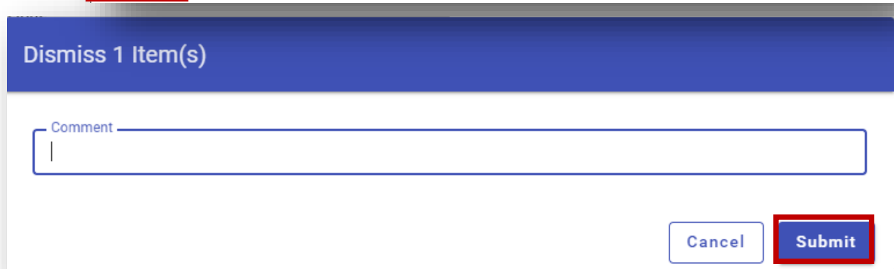
The Dismiss item comment screen opens. A comment is not required.

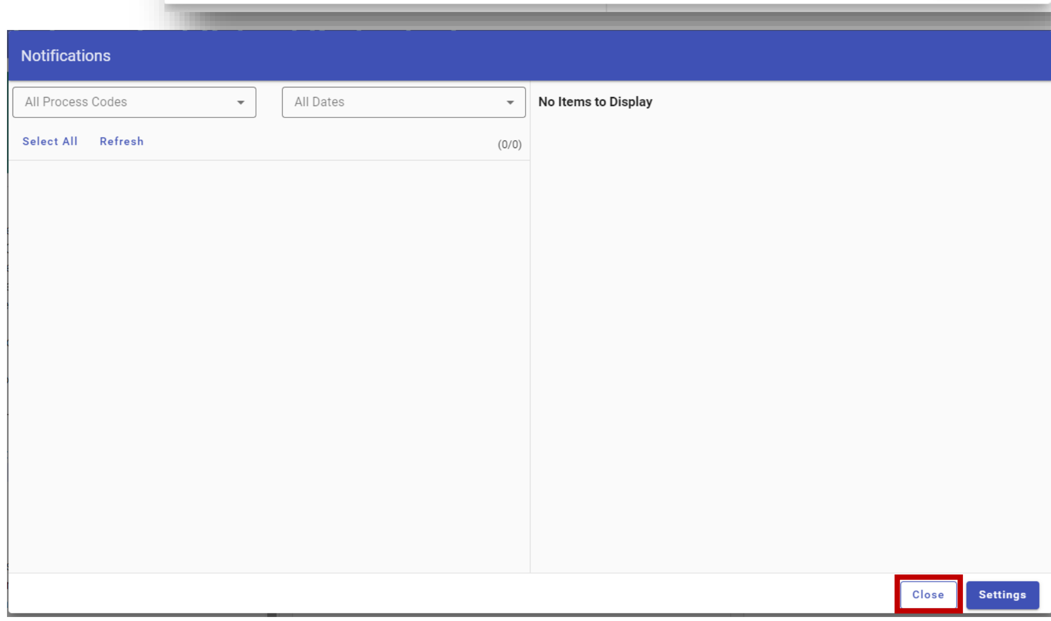
Click Submit.

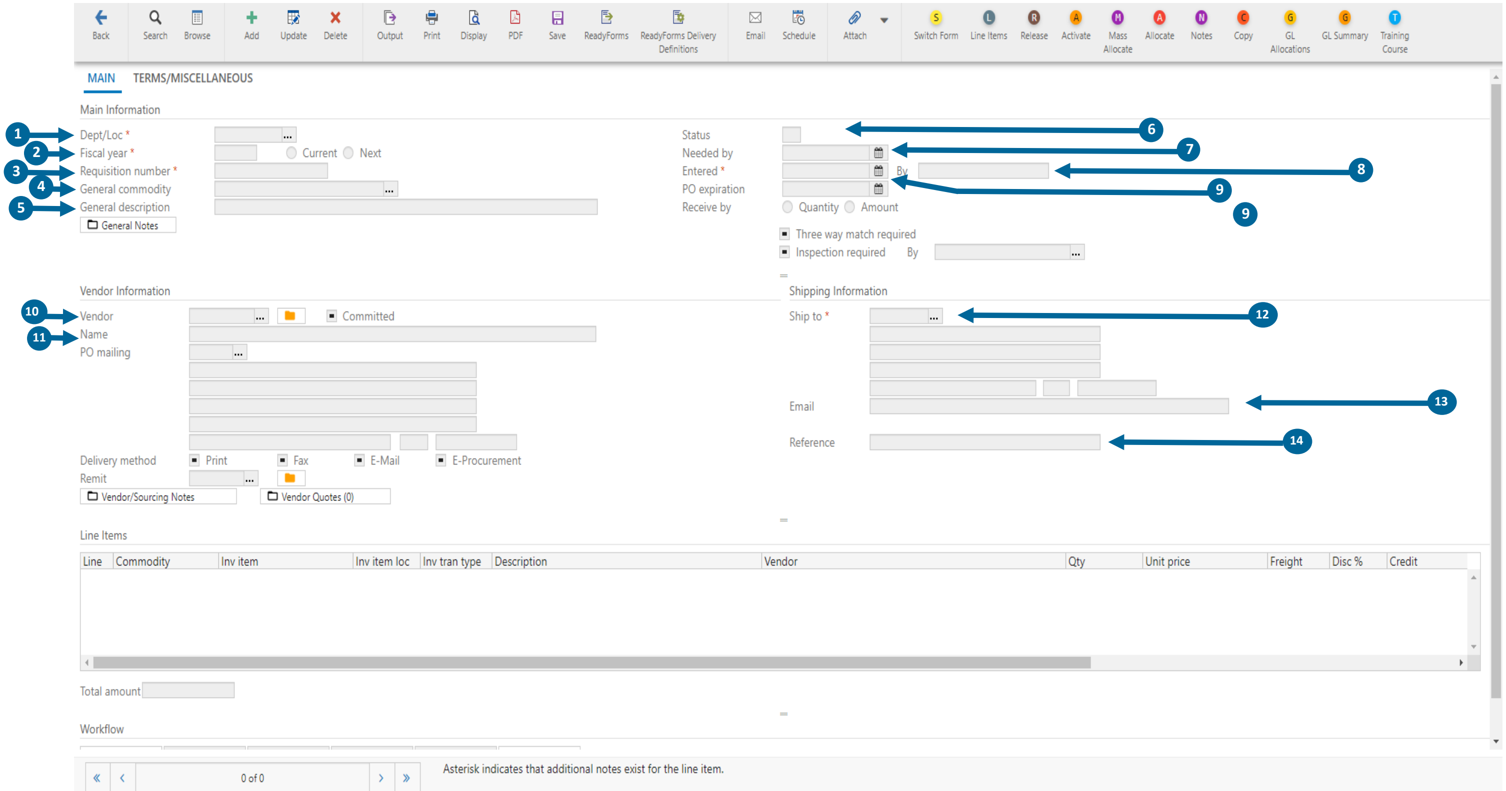
The screen will automatically refresh.

Click Close









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.

Vendor 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.