

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

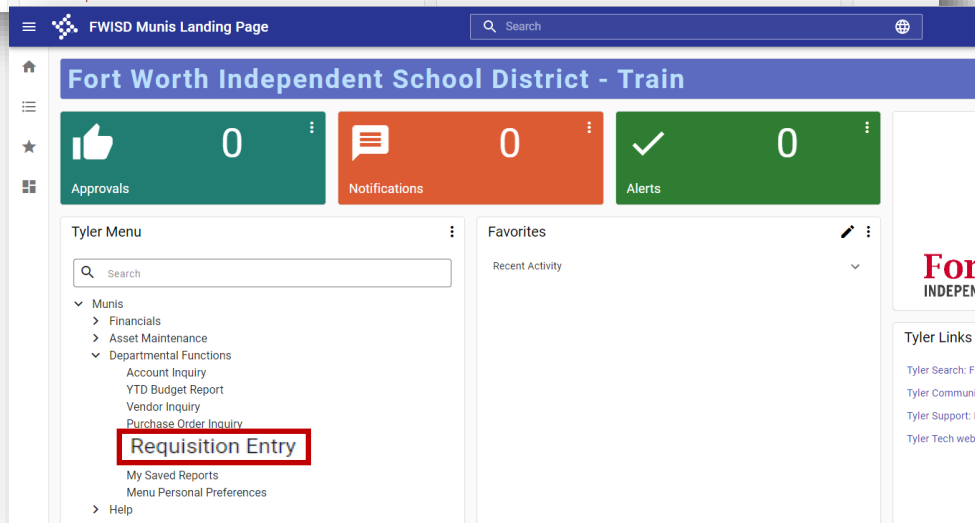
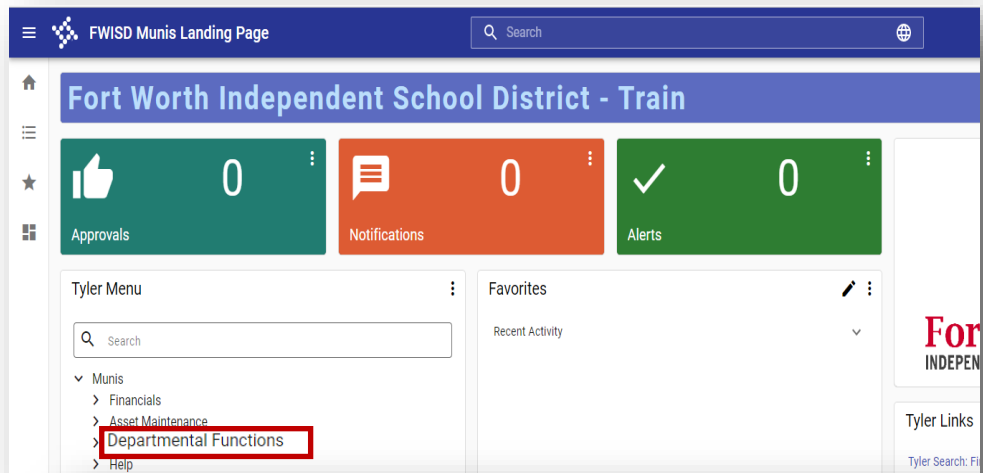


The FWISD Munis Landing Page Opens.

From the Tyler Menu:

Click Departmental Functions

Click Requisition Entry



2ND STEP

The Requisition window opens.

Click Add.

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 window contains several sections: 'Main Information' with fields for Dept/Loc, Fiscal year, Requisition number, General commodity, and General description; 'Vendor Information' with fields for Vendor Name, PO mailing, and Delivery method; and 'Line Items' with a table for Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, Vendor, Qty, Unit price, and Freight. The 'Status' section on the right shows 'Created' and 'Entered' dates.

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. The 'Add' button, represented by a green plus sign in a red box, is located in the top toolbar. The window contains several sections: 'Main Information' with fields for Dept/Loc, Fiscal year, Requisition number, General commodity, and General description; 'Vendor Information' with fields for Vendor Name, PO mailing, and Delivery method; and 'Line Items' with a table for Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, Vendor, Qty, Unit price, and Freight. The 'Status' section on the right shows 'Created' and 'Entered' dates. Red arrows point to the 'Dept/Loc' field (346), 'Fiscal year' field (2022), 'Status' dropdown (2), 'Entered' date (02/16/2022), and 'By' field (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 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.

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

Commodity Help

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		
630	TSSE2	DIRECTOR APPROVAL FOR TRAVEL FROM STUDENT ENROLLMENT IN STATE TRAVEL ONLY
700	TSIS2	DIRECTOR APPROVAL FOR TRAVEL FROM STUDENT INTERVENTION IN STATE TRAVEL ONLY
750	233-D	DISK JOCKEY SERVICES
760	781	DISTRICT CARD PURCHASES
770	255	DUES (MEMBERSHIP, ETC.)
820	TVEL1	ELEMENTARY SCHOOL IN-STATE TRAVEL
120	TVEL3	ELEMENTARY SCHOOL OUT OF COUNTRY TRAVEL
100	TVEL2	ELEMENTARY SCHOOL OUT OF STATE TRAVEL
101		
520	441	ELEMENTARY SCHOOL SUPPLIES
541	381	EMERGENCY PURCHASES FOR MAINTENANCE, REPAIR & OPERATIONS (MOC - ALL SHOPS)
610	260	ENVIRONMENTAL SERVICES & RELATED
620	ePr14	EPROCUREMENT CC FOR ACADEMIC SUPPLIER
630	ePro3	EPROCUREMENT CC FOR AMAZON.COM
640	ePr10	EPROCUREMENT CC FOR BLICK ART MATERIALS
650	ePro4	EPROCUREMENT CC FOR CDW-G
660	ePro9	EPROCUREMENT CC FOR GOPHER SPORT
670	ePro6	EPROCUREMENT CC FOR LAKESHORE
680	ePro7	EPROCUREMENT CC FOR NASCO
690	ePro5	EPROCUREMENT CC FOR OFFICE DEPOT
700	ePro2	EPROCUREMENT CC FOR SCHOOL SPECIALTY
710	ePro1	EPROCUREMENT CC FOR STAPLES
720	ePr13	EPROCUREMENT FOR DREAM RANCH LLC
730	ePr11	EPROCUREMENT FOR GRAINGER
740	ePr15	EPROCUREMENT FOR LIMITLESS OFFICE PRODUCTS
750	ePro8	EPROCUREMENT FOR REALLY GOOD STUFF
760	937	ESM Vendor (Highsmith Inc)
770	920	ESM Vendor (Academic Supplier)

6TH STEP

The screen returns to the main page.

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

Requisition Entry [FWISD Live Data]

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING

Fiscal year * 2022 ... Current ... Next

Requisition number * 12226040

General commodity ePro3 ... EPROCUREMENT CC FOR AMAZON.COM

General description EPROCUREMENT CC FOR AMAZON.COM

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

Vendor Information

7TH STEP

Click on the General Notes button.

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

Requisition Entry [FWISD Live Data]

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING Status
Fiscal year * 2022 • Current ○ Next Needed by
Requisition number * 12226040 Entered *
General commodity ePro3 ... EPROCUREMENT CC FOR AMAZON.COM PO expiration
General description EPROCUREMENT CC FOR AMAZON.COM Receive by

General Notes

Vendor Information

General Notes

Back Accept Cancel Print On PO Import

Note

Requisition 2022 12226040
Date/Time 2022-02-18 09:32 ☒ Print on PO.
Created By kim.cummings

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.

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.

General Notes

Back Accept Cancel Print On PO Import

Note

Requisition 2022 12226040
Date/Time 2022-02-18 09:32 ☒ Print on PO.
Created By kim.cummings

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.

Requisition Entry [FWISD Live Data]

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING
Fiscal year * 2022 • Current ○ Next
Requisition number * 12226040
General commodity ePro3 ... EPROCUREMENT
General description EPROCUREMENT CC FOR AMAZON.COM

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 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.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' form. The 'MAIN' tab is selected, and the 'TERMS/MISCELLANEOUS' section is active. The 'Main Information' section includes fields for Dept/Loc (346), Fiscal year (2022), Requisition number (12226049), General commodity (ePro3), and General description (EPROCUREMENT CC FOR AMAZON.COM). The 'Vendor Information' section shows the Vendor (23825) and Name (AMAZON.COM). The 'Delivery method' section has the 'E-Procurement' checkbox checked and highlighted with a red box. The 'Status' section shows 'Created' and 'Entered' date (02/18/2022). The 'Shipping Information' section shows 'Ship to' (346) and 'Email' (aracely.chavez@fwisd.org).

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.

12TH STEP

Click Accept.

13TH STEP

The Line Items window opens.

Click Shop Online

Line Items

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

Requisition
Fiscal year Number Line

Detail
Quantity *
Commodity
Inventory item
Location
Type
☐ Pick ticket
☐ Purchase

Description *

Miscellaneous
Manufacturer
Manufacturer item no.
Vendor

14TH STEP

Double click the ePro vendor to begin online shopping.

Punchout Vendors

Back Accept Cancel Search Output Print Display PDF Save Excel Word

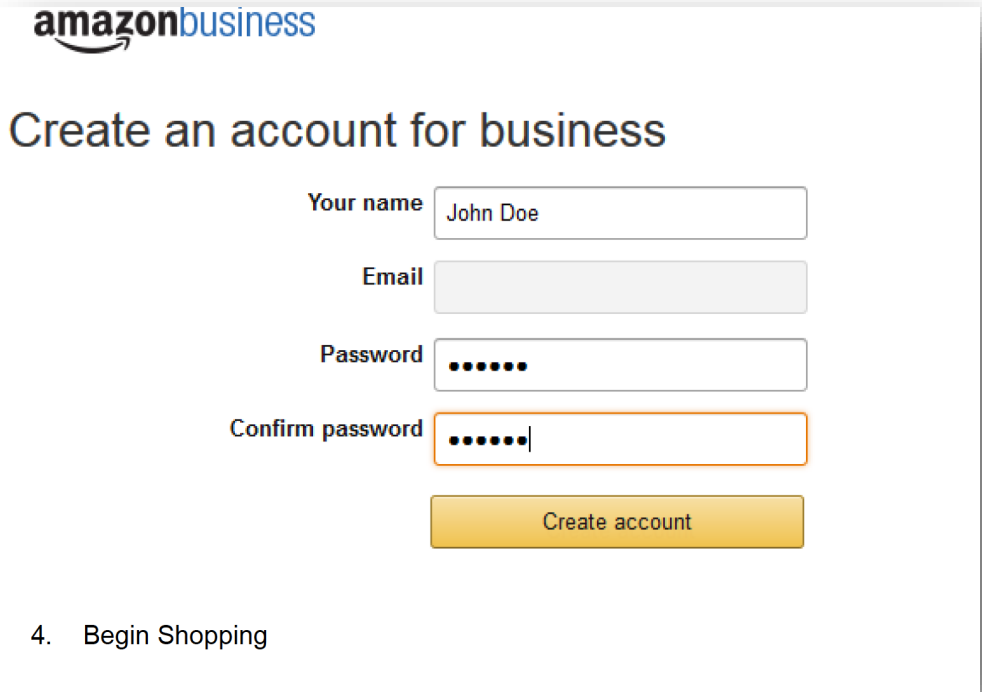
Vendor	Alpha Sort
43	SCHOOL SPECIALTY
14842	ACADEMIC SUPPLIER
41	STAPLES CONTRACT
23825	AMAZON
5492	OFFICE DEPOT
24726	DREAM RANCH OFFICE
1264	LAKESHORE LEARNING
1256	BLICK ART MATERIALS
4190	REALLY GOOD STUFF
1271	CDW GOVERNMENT, INC.

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.



amazonbusiness

Create an account for business

Your name

Email

Password

Confirm password

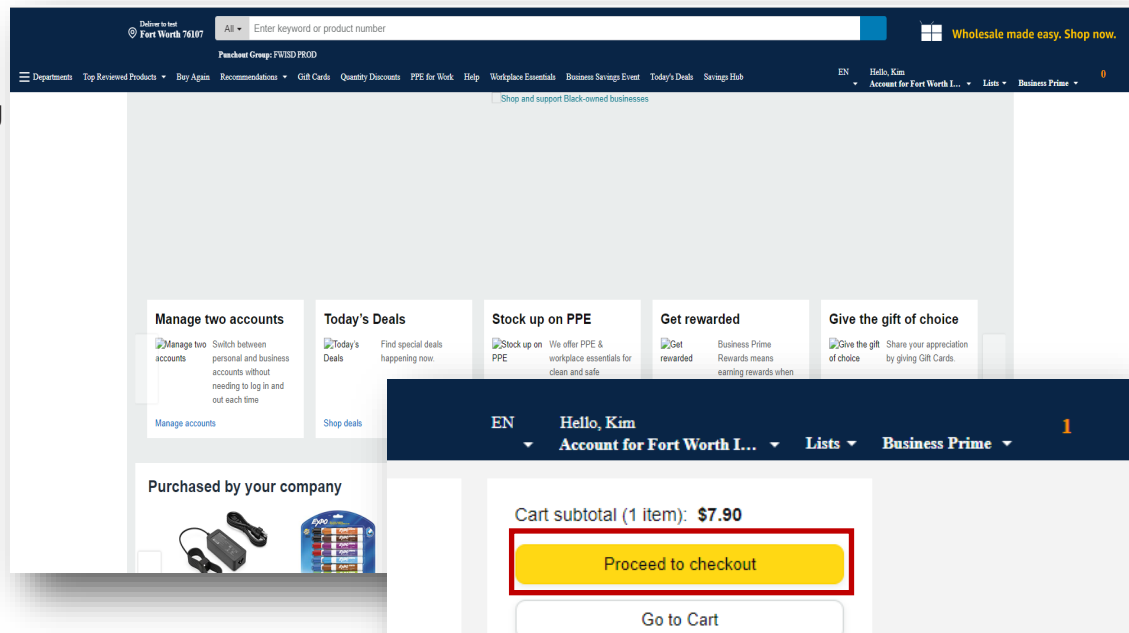
Create account

4. Begin Shopping

16TH STEP

The Amazon main shopping page will open.

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



Deliver to Fort Worth 76107

All Enter keyword or product number

Wholesale made easy. Shop now.

Amazon Prime

Manage two accounts

Today's Deals

Stock up on PPE

Get rewarded

Give the gift of choice

Cart subtotal (1 item): \$7.90

Proceed to checkout

Go to Cart

17TH STEP

The Select a payment method window will display .

Click Continue

amazon.com SIGN IN SHIPPING & PAYMENT GIFT OPTIONS PLACE ORDER

Select a payment method

FWISD PROD credit and debit cards

	Name on card	Expires on
Bank of America Merrill Lynch ending in 1530 Mastercard Provided by your organization	fwisd amazon	08/2026

Continue

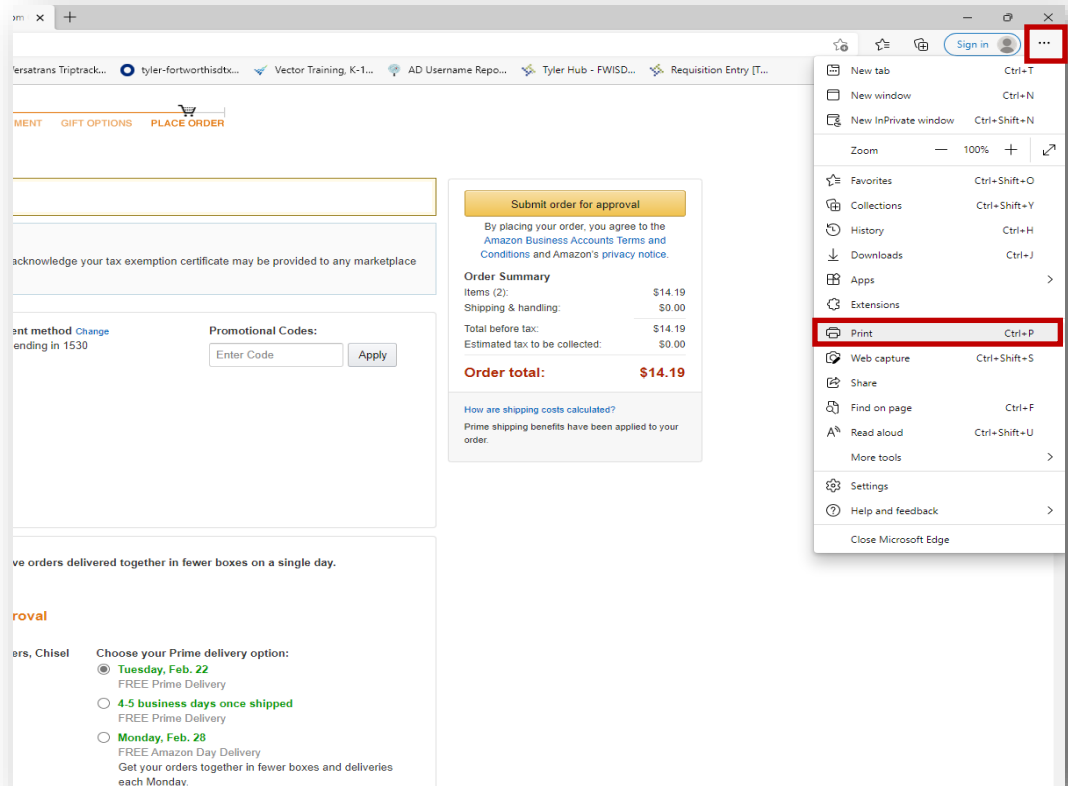
You can review this order before it's final.

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.

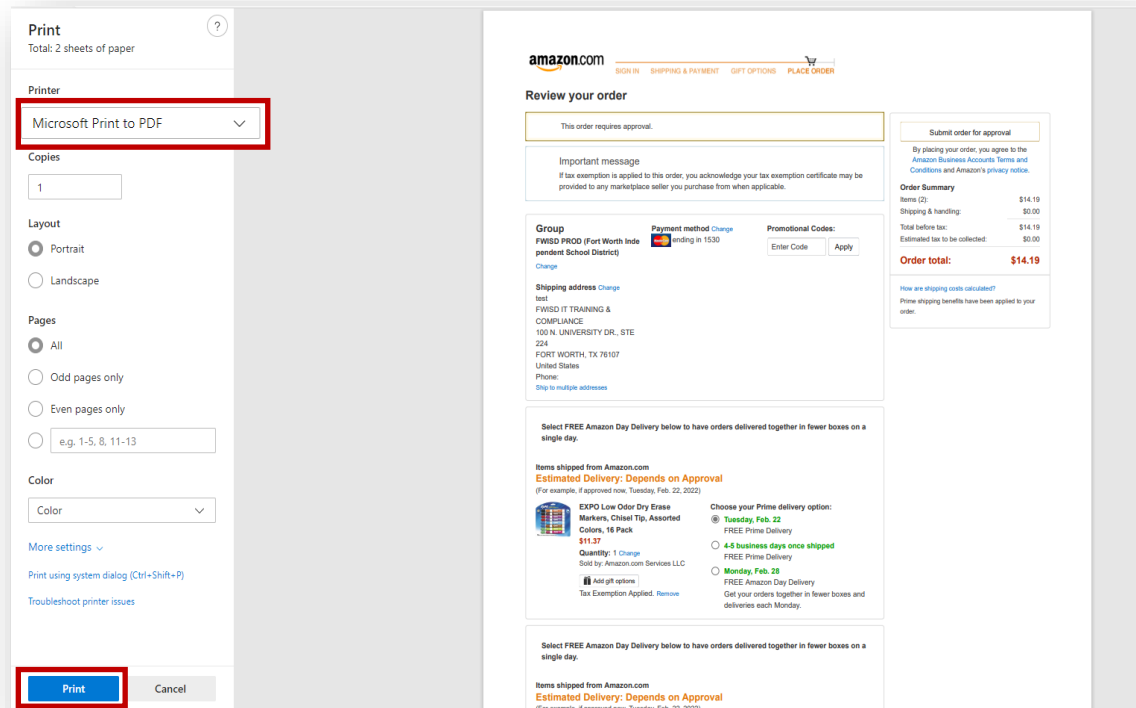


20TH STEP

The print window displays.

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

Click Print.

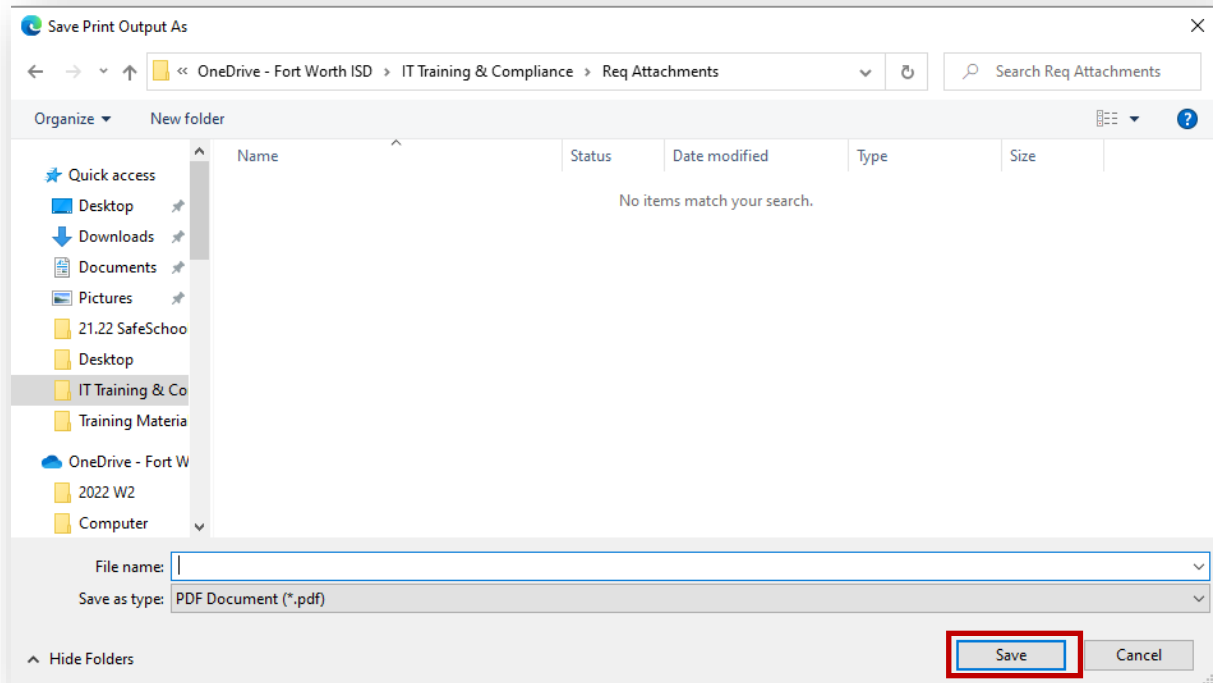


21ST STEP

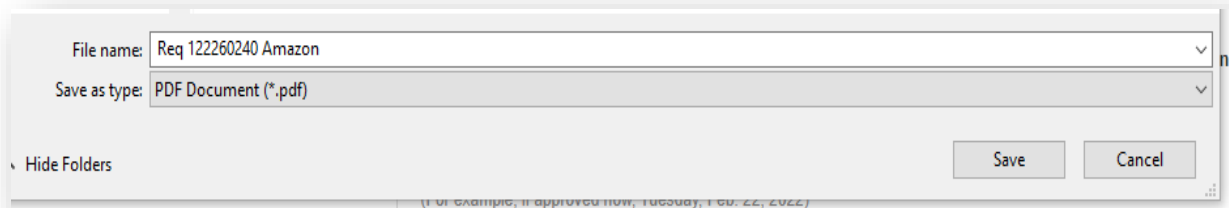
The Save Print Output As screen opens.

select 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".

amazon.com SIGN IN SHIPPING & PAYMENT GIFT OPTIONS PLACE ORDER

Review your order

Warning: This order requires approval.

Important message: If tax exemption is applied to this order, you acknowledge your tax exemption certificate may be provided to any marketplace seller you purchase from when applicable.

Group: FWISD PROD (Fort Worth Independent School District)
[Change](#)

Payment method: [Change](#) ending in 1530

Promotional Codes: Enter Code

Shipping address: [Change](#)
test
FWISD IT TRAINING & COMPLIANCE
100 N. UNIVERSITY DR., STE 224
FORT WORTH, TX 76107
United States
Phone:
[Ship to multiple addresses](#)

Order Summary:

Items (2):	\$19.33
Shipping & handling:	\$0.00
Total before tax:	\$19.33
Estimated tax to be collected:	\$0.00
Order total:	\$19.33

How are shipping costs calculated?
Prime shipping benefits have been applied to your order.

Select FREE Amazon Day Delivery below to have orders delivered together in fewer boxes on a single day.

Items shipped from Amazon.com
Estimated Delivery: Depends on Approval
(For example, if approved now, Tuesday, Feb. 22, 2022)

EXPO Low Odor Dry Erase Markers, Chisel Tip, Assorted Colors, 16 Pack
\$11.37 ✓prime
Quantity: 1 [Change](#)
Sold by: Amazon.com Services LLC

Tax Exemption Applied. [Remove](#)

Choose your Prime delivery option:

- ☒ **Tuesday, Feb. 22**
FREE Prime Delivery
- ☐ **4-5 business days once shipped**
FREE Prime Delivery
- ☐ **Monday, Feb. 28**
FREE Amazon Day Delivery
Get your orders together in fewer boxes and deliveries each Monday.

23RD STEP

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

Click "close" in the dialogue box.

vss/PunchOutPOSubmission.aspx

TRS LogOn | SmartFind... Munis Versatrans Triptrack... tyler-fortworthisdtx...

Your items have been submitted to MUNIS.
Once in MUNIS, click the "continue" option to populate your requisition with your items.
It is OK to **close** this page.

24TH STEP

A blank Line Items window displays.

Click Continue.

The screenshot shows the 'Line Items' window with a blue header. Below the header is a toolbar with buttons: Back, Search, Browse, Continue (highlighted with a red box), and Cancel. The main area is divided into sections: Requisition (Fiscal year, Number, Line), Detail (Quantity, Commodity, Inventory item, Location, Type with radio buttons for Pick ticket and Purchase), Description (with an Add'l Desc/Notes button), and Miscellaneous.

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.

The screenshot shows the 'Line Items' window with populated data. The Requisition section shows Fiscal year 2022, Number 12226049, and Line 1. The Detail section shows Quantity 1.00, Commodity, Inventory item, Location, and Type (Purchase). The Description section shows a detailed item description: 'ITEM: Expo Low Odor Dry Erase Marker Set with White Board Eraser and Cleaner | Fine Tip Dry Erase Markers | Assorted Colors, 7 Piece Set with'. The Miscellaneous section shows Manufacturer, Manufacturer item no., Vendor (23825), PO mailing (0), Delivery method (E-Procurement checked), Remit (0), Vendor item no., and 1099 box. The right side shows Unit price, UOM (EA), Freight, Discount percent (.00), Credit, Line item total, and Amount justification. The bottom of the screen shows a table with columns: Seq, T, Account, Description, Amount, GL Bud. The page number '1 of 2' is displayed at the bottom, highlighted with a red box.

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.

Line Items

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

Requisition
Fiscal year 2022 Number 12226049 Line 1

Detail
Quantity * 1.00
Commodity
Inventory item
Location
Type
Pick ticket
Purchase
Description *
Supplier Quote No: 131-3218909-2540444,1
NIGP: 44121708
UNSPSC: 44121708
Add'l Desc/Notes

Miscellaneous
Manufacturer
Manufacturer item no.
Vendor 23825
PO mailing 0
Delivery method
Print
Fax
E-Mail
E-Procurement
Remit 0
Vendor item no.
1099 box

Bid
Dept/Loc 346
Required by
Requested by
Receipt notification to
Capital asset N
WO number
WO task
Notify buyer

Seq	T	Account	Description	Amount	GL Bud
01	Expense	199-21-6399-001-999-99-346-000000-	GENERAL SUPPLIES	7.96	
				.00	

1 of 2 GL Account to be charged.

MASS ALLOCATION OF GL ACCOUNT

27TH STEP

Click on Mass Allocate.

Line Items

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

Requisition
Fiscal year 2022 Number 12226049 Line 1

Detail
Quantity * 1.00
Commodity
Inventory item
Location
Type
Pick ticket
Purchase
Description *
ITEM: Expo Low Odor Dry Erase Marker Set with White Board Eraser and Cleaner | Fine Tip Dry Erase Markers | Assorted Colors, 7 Piece Set with
Add'l Desc/Notes

Miscellaneous
Manufacturer
Manufacturer item no.
Vendor 23825
AMAZON.COM
Bid
Dept/Loc 346
Required by
CLASSIFIED LEARNING

Seq	T	Account	Description	Amount	GL Bud
01	Expense	199-21-6399-001-999-99-346-000000-	GENERAL SUPPLIES	7.96	
				.00	

28TH STEP

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

Click Accept.

Click Process.

Mass Allocate

Back Accept Cancel Search Clear Contents

Allocations

Seq	T	Account	Description	Percent
01	Expense	199-21-6399-001-999-99-346-000000-	GENERAL SUPPLIES	100.000

Mass Allocate

Back Search Update Process

Allocations

Seq	T	Account	Description	Percent
01	Expense	199-53-6399-001-999-99-346-000000-	GENERAL SUPPLIES	100.000

29TH STEP

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

Click Back.

Mass Allocate

Back Search Update

Allocations

Seq	T	Account	Description
01	Expense	199-21-6399-001-999-99-346-000000-	GENERAL SUPPLIES

Percent allocated to the entered account(s).
Processing complete.

30TH STEP

The Line Items window will display

Click Back

Line Items

Requisition
Fiscal year: 2022 Number: 12226049 Line: 1

Detail
Quantity: 1.00
Commodity: ...
Inventory item: ...
Location: ...
Type: ☐ Pick ticket ☐ Purchase
Description: ITEM: Expo Low Odor Dry Erase Marker Set with White Board Eraser and Cleaner | Fine Tip Dry Erase Markers | Assorted Colors, 7 Piece Set with
Add'l Desc/Notes

Miscellaneous
Manufacturer: ...
Manufacturer item no.: ...
Vendor: 23825 ... AMAZON.COM
PO mailing: 0 ...
Delivery method: ☐ Print ☐ Fax ☐ E-Mail ☒ E-Procurement
Remit: 0 ...
Vendor item no.: 1099 box

Seq T Account Description
01 Expense 199-21-6399-001-999-99-346-000000- GENERAL SUPPLIES

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.

Requisition Entry [FWISD Live Data]

MAIN TERMS/MISCELLANEOUS

Main Information
Dept/Loc: 346 ... CLASSIFIED LEARNING
Fiscal year: 2022 Current Next
Requisition number: 12226049
General commodity: ePro3 EPROCUREMENT CC FOR AMAZON.COM
General description: EPROCUREMENT CC FOR AMAZON.COM

Vendor Information
Vendor: 23825 ... AMAZON.COM
Name: AMAZON.COM
PO mailing: 0 ...
410 TERRY AVENUE NORTH
SEATTLE WA 98109
Delivery method: ☐ Print ☐ Fax ☐ E-Mail ☒ E-Procurement
Remit: 0 ... AMAZON.COM
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: test

Line Items

Unit price	Freight	Disc %	Credit	Line Total	1st GL Account
7.96000	0.00	0.00	0.00	7.96	199-21-6399-001-999-99-346-000000-
11.37000	0.00	0.00	0.00	11.37	199-21-6399-001-999-99-346-000000-

Informational:

When All information has been entered and the GL accounts assigned, 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]

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
 Needed by 02/16/2022 By First.Last
 Entered * 06/30/2022
 PO expiration
 Receive by
☒ 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

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 Items

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

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.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

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 6 Released
 Needed by 02/16/2022 By First.Last
 Entered * 06/30/2022
 PO expiration
 Receive by
☒ 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

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 Items

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

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.

The screenshot shows the 'Requisition Entry' interface for the 'TRAIN DATABASE' as of January 25, 2022. The top toolbar contains various icons for document management. The 'Attach' icon, which depicts a document with a paperclip, is highlighted with a red rectangular box. Below the toolbar, the 'MAIN' tab is selected, and the 'TERMS/MISCELLANEOUS' section is visible. The form contains fields for 'Main Information' (Dept/Loc, Fiscal year, Requisition number, General commodity, General description) and 'Vendor Information' (Vendor, Name). The 'Status' section shows 'Allocated' and 'Entered' dates. The 'Shipping Information' section shows 'Ship to' details.

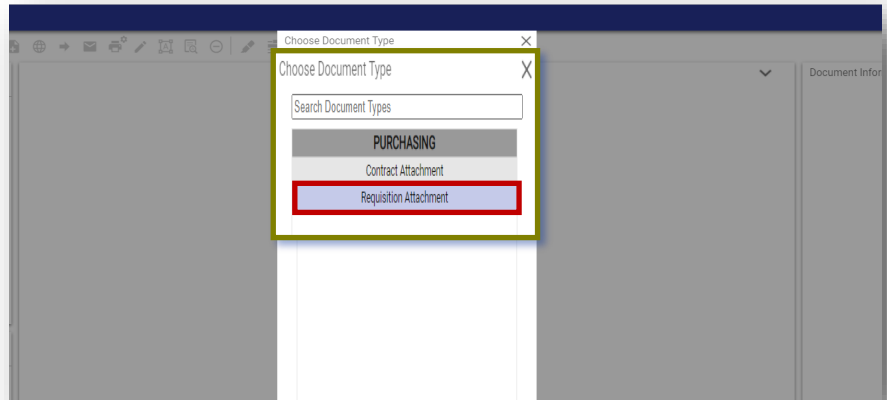
2ND STEP

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


The screenshot shows the 'Tyler Content Manager' interface. The top toolbar contains various icons for document management. The '+' icon, which is used to create a new document, is highlighted with a red rectangular box. Below the toolbar, the 'Create new document (Ctrl+Alt+A)' button is visible. The 'Filter by' section shows a table with columns for 'Date', 'Key1', 'Key2', and 'DocType'.

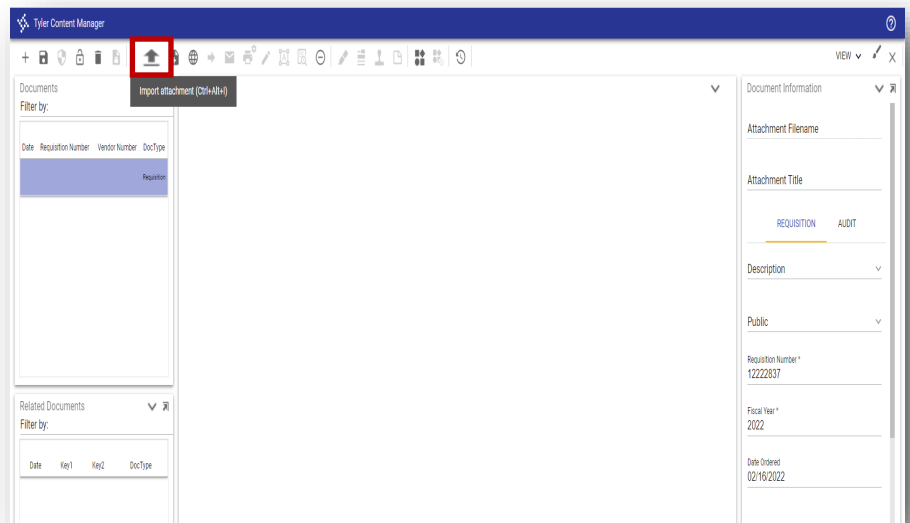
3RD STEP

Click Requisition Attachment



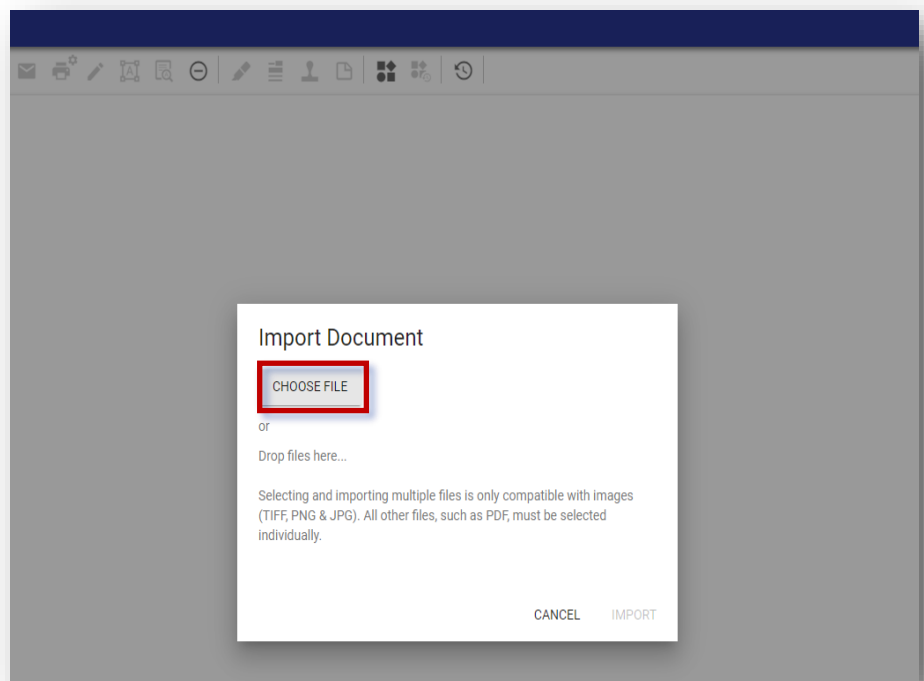
4TH STEP

Click on the  arrow to import the attachment.



5TH STEP

The Import Document window opens.

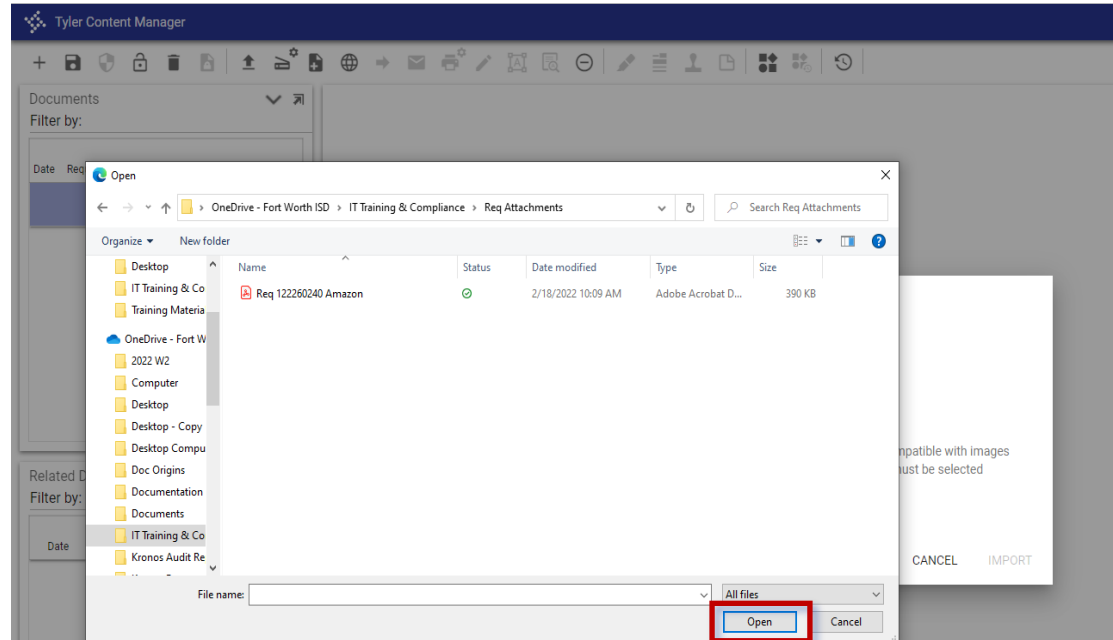


6TH STEP

The File Explorer window opens.

Locate and click on the file.

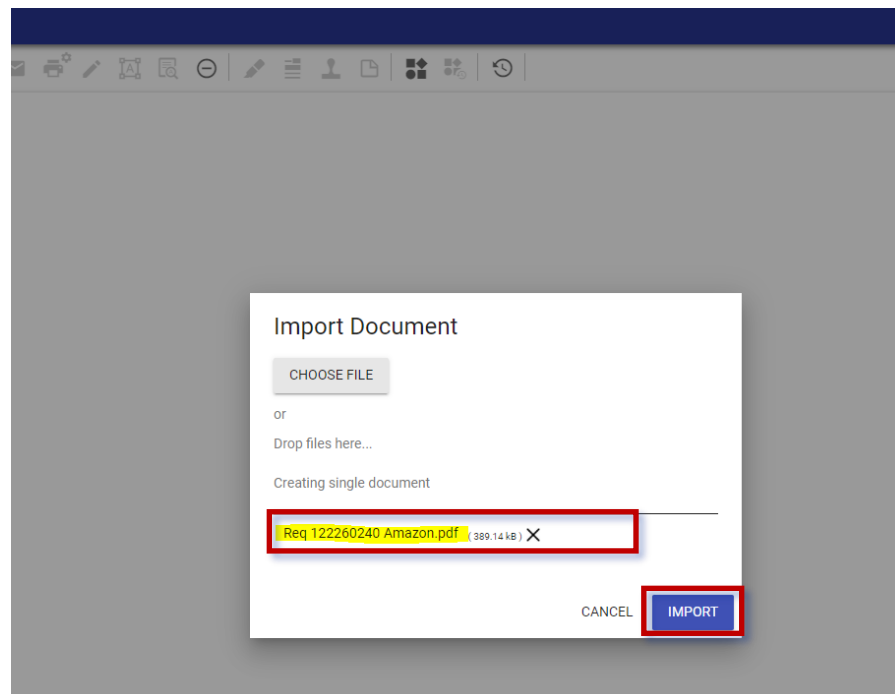
Click Open.



7TH STEP

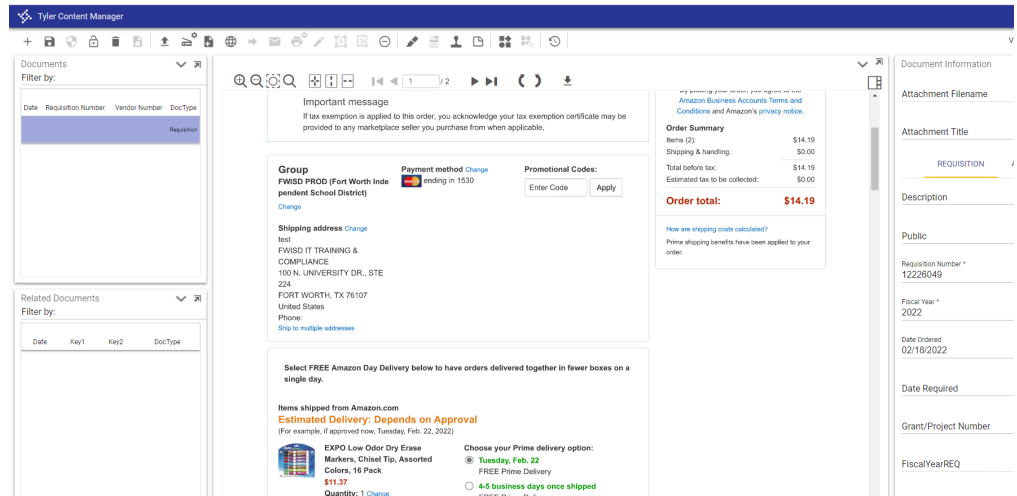
The uploaded filename will display in the Import Document window underneath the line.

Click Import.



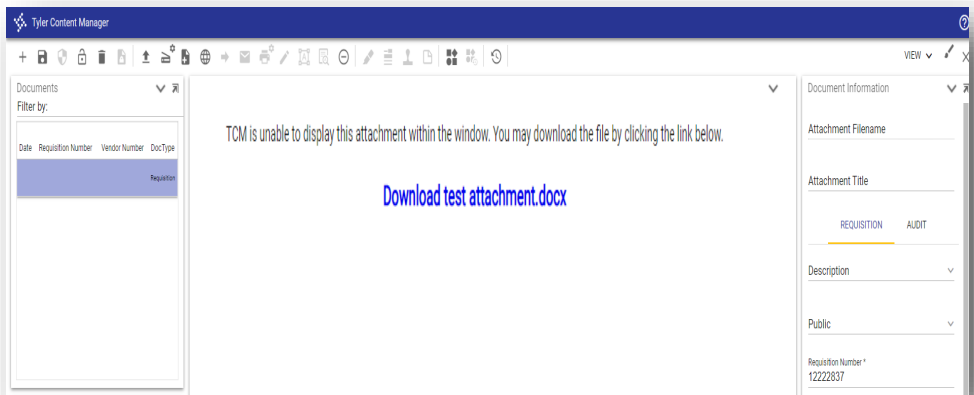
8TH STEP

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.

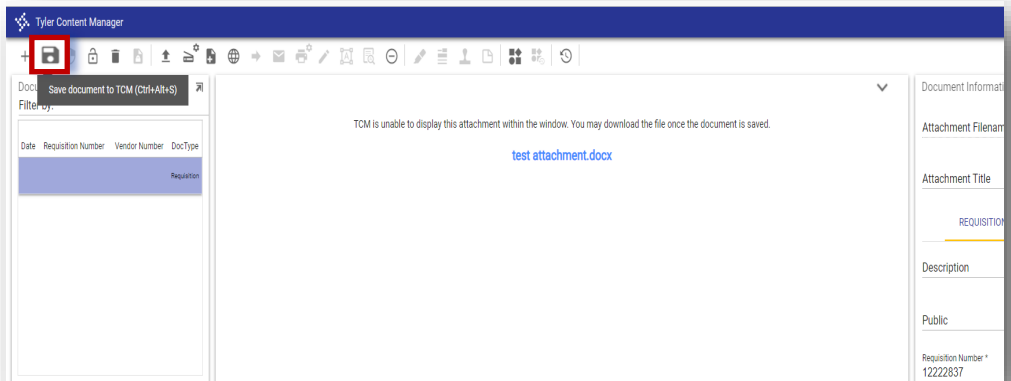
In order to view the file, click the download link in the middle of the window.



9TH STEP

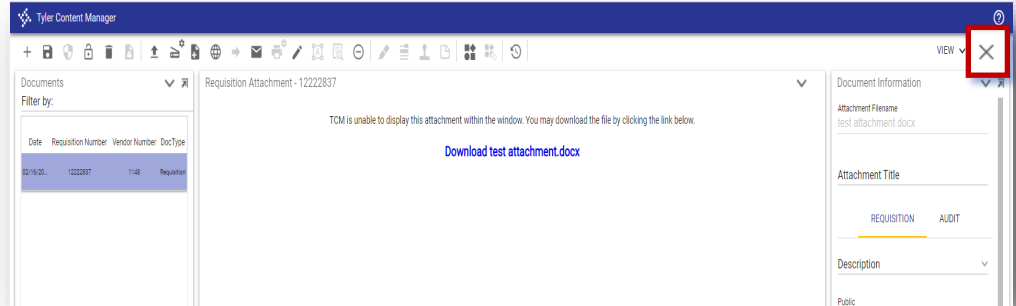
Click on the Save button.

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



10TH STEP

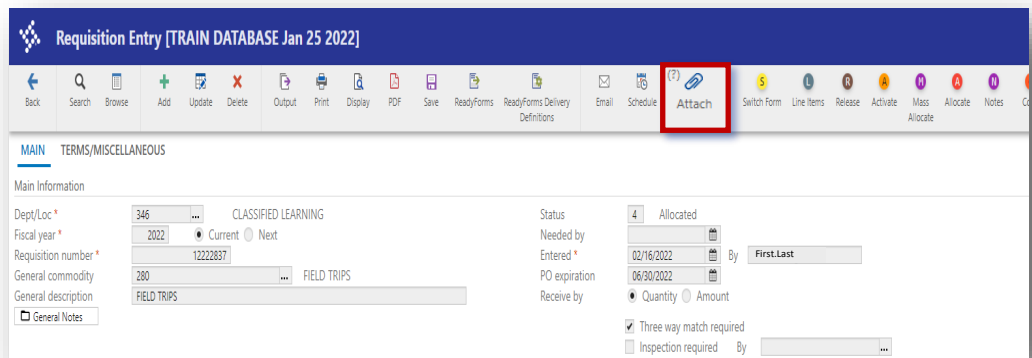
Click the X in the right corner to close the TCM viewer.



Informational:

The number of attachments will display next to the paperclip.

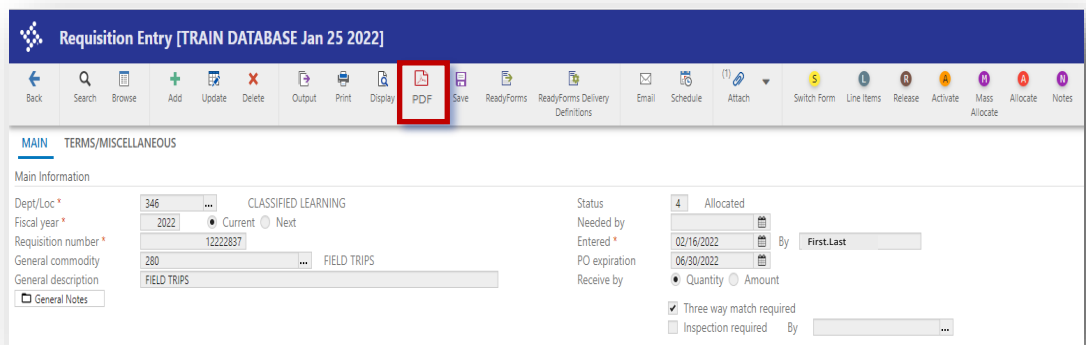
If the number is a question mark, it still recognizes that there is an attachment.



PRINT REQUISITION—OPTIONAL

1ST STEP

Click on PDF.



2ND STEP

The Options window opens.

Choose Req Format

Requisition Entry [TRAIN DATABASE Jan 25 2022]

MAIN

TERMS/MISCELLANEOUS

Main Information

ept Loc *
2022
equation number *
280
eneral commodity
FIELD TRIPS

General Notes

CLASSIFIED LEARNING

Current ☒ Next

12222837

FIELD TRIPS

Status
Needed by
Entered *
PO expiration
Receive by

6 Released

02/16/2022

By kim.cummings

06/30/2022

☒ Quantity ☐ Amount

☒ Three way match required

☐ Inspection required By

Shipping Information

Ship to * 346

Endor Information

T148
FORT WORTH ZOO ASSOCIATION
0
1989 COLONIAL PARKWAY
FORT WORTH TX 76110
elivery method
Print Fax E-Mail Procurement
mit 1 FORT WORTH ZOO ASSOCIATION

Vendor/Sourcing Notes

Vendor Quotes (0)

Committed

TX 76110

Options

Choose an option

☒ Req Format
☐ PO Format

OK

Cancel

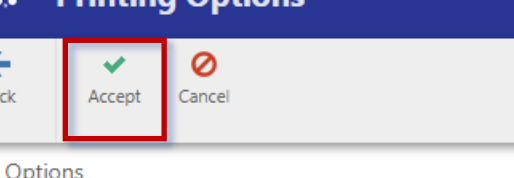
ne Items

Line#	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor	Qty	Unit price	Freight	Disc %	Credl
1					Field Trip to Fort Worth Zoo for 25 students.	(1148) FORT WORTH ZOO ASSOCIATION	1.00	250.0000	0.00	0.00	0.00

3RD STEP

The Printing Options window opens.

Click Accept



Printing Options

Back Accept Cancel

Print Options

- ☒ Full GL Account Number
- ☐ Org/Obj
- ☒ Print GL account description with each line
- ☐ Print vendor SSN/FID
- ☐ Print authorized by signature line
- ☒ Print user-defined 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				Requisition 12222837-00 FY 2022	
FWISD ACCOUNTS PAYABLE 100 N. UNIVERSITY DR. 140-E FORT WORTH, TX 76107				Acct No: 199-11-6412-001-001-11-144-000000- Review: Buyer: michelle.rodriquez1 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	1001148				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.

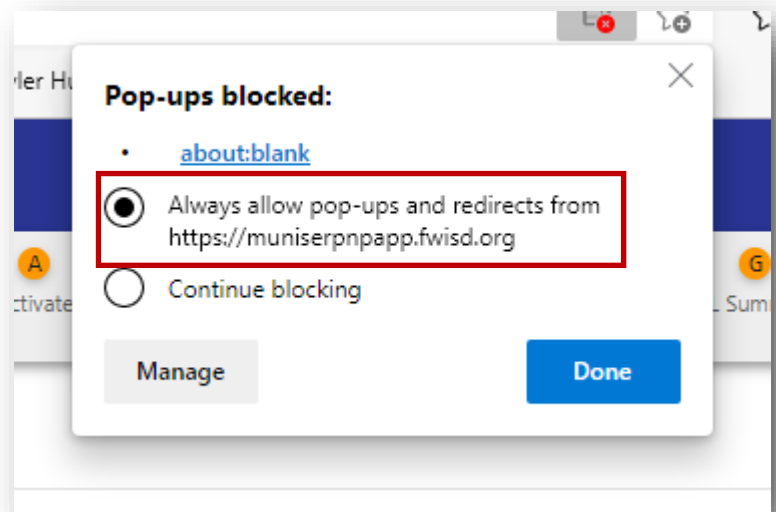
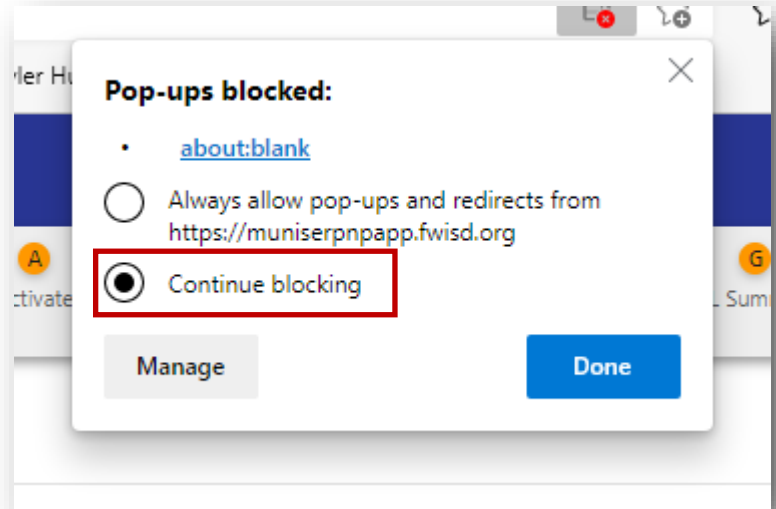
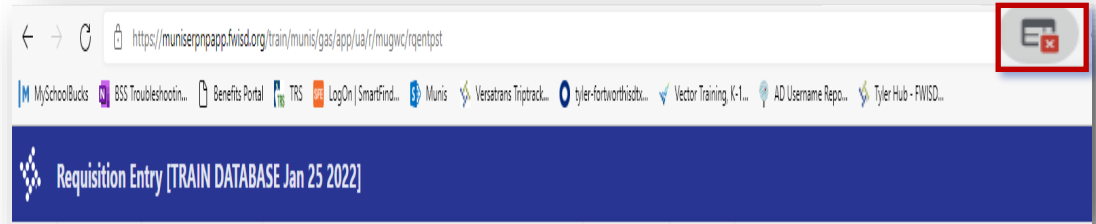
This can be seen by the icon at the end of the address bar.

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://munisernpapp.fwisd.org”

Click Done



LOOK UP THE APPROVERS FOR THE REQUISITION

1ST STEP

Click on Approvers.

The Work Flow Status window opens.

Requisition Entry [TRAIN DATABASE Jan 25 2022]

Back Search Browse Add Update Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email Schedule

Main Information

Dept/Loc * 346 ... CLASSIFIED LEARNING Status 0
 Fiscal year * 2022 ... Current Next Needed by
 Requisition number * 12214456 Entered * 10/27
 General commodity 720 ... TECHNOLOGY RELATED SERVICES PO expiration 06/30
 General description SAFESCHOOLS LICENSE FOR CTE STUDENTS Receive by
☐ General Notes

Vendor Information

Vendor 20252 ... ☐ Committed Ship
 Name VECTOR SOLUTIONS Ship
 PO mailing 0 ...
 4890 W. KENNEDY BLVD
 STE 300
 TAMPA FL 33609 Ema
 Delivery method ☒ Print ☐ Fax ☐ E-Mail ☐ E-Procurement Refe
 Remit 1 ... VECTOR SOLUTIONS
☐ Vendor/Sourcing Notes ☐ Vendor Quotes (0)

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor
1					EMPLOYEE SAFETY AND COMPLIANCE LIBRARY - SST FOR ST	(20252) VE

Total amount 3010.00

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	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.

FWISD Munis Landing Page

Fort Worth Independent School District - Prod

Approvals 0 Notifications 2 Alerts 0

Notifications

All Process Codes All Dates

Select All Refresh (0/2)

Process Code	Amount	Date
RCP: Requisitions converted to purchase orders	\$1,793.32 - EPROCUREMENT CC FOR OFFICE DEPOT	2/7/2022

RCP: Requisitions converted to purchase orders

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

Close Settings

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

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
-------------------------------------	---	----------

Dismiss

Dismiss 1 Item(s)

Comment

Cancel

Submit

Notifications

All Process Codes

All Dates

Select All

Refresh

(0/0)

No Items to Display

Close

Settings

The screenshot shows the eProcurement system 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 a 'MAIN' tab and a 'TERMS/MISCELLANEOUS' section. The interface is divided into several sections: 'Main Information' (1-5), 'Vendor Information' (10-11), 'Delivery method' (Print, Fax, E-Mail, E-Procurement), 'Status' (6-9), 'Shipping Information' (12-14), and 'Line Items' (a table with columns: Line, Commodity, Inv item, Inv item loc, Inv tran type, Description, Vendor, Qty, Unit price, Freight, Disc %, Credit). The 'Line Items' section also includes a 'Total amount' field and a 'Workflow' section at the bottom. Asterisks indicate required fields.

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.