

Req Rejected, Now What? *Using Munis*

A How-to Guide

Requisitions can be rejected for many reasons which can include missing information from the description, missing an attachment, and wrong GL account used. With these instructions the end user will be able to view and resolve the rejected requisitions.

1ST STEP

Open the FWISD homepage > Employees> My FWISD ClassLink Portal or click the Classlink icon on the desktop.



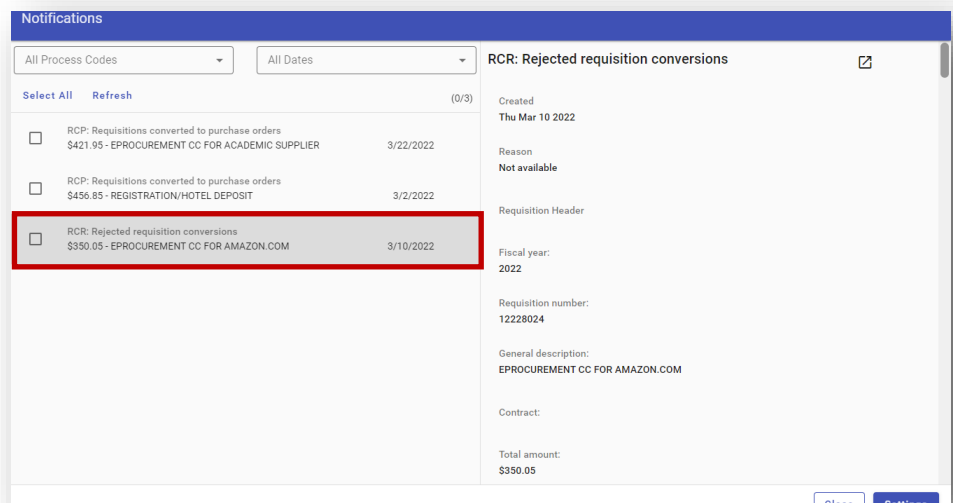
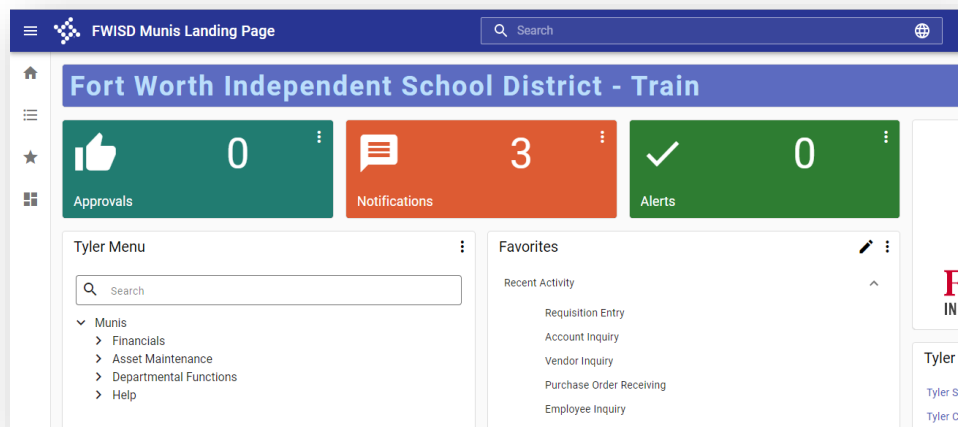
Locate and click on the Munis icon



One way to find rejected requisitions:

Click on Notifications to view requisitions converted or rejected purchase orders.

Make note of the rejected requisition number

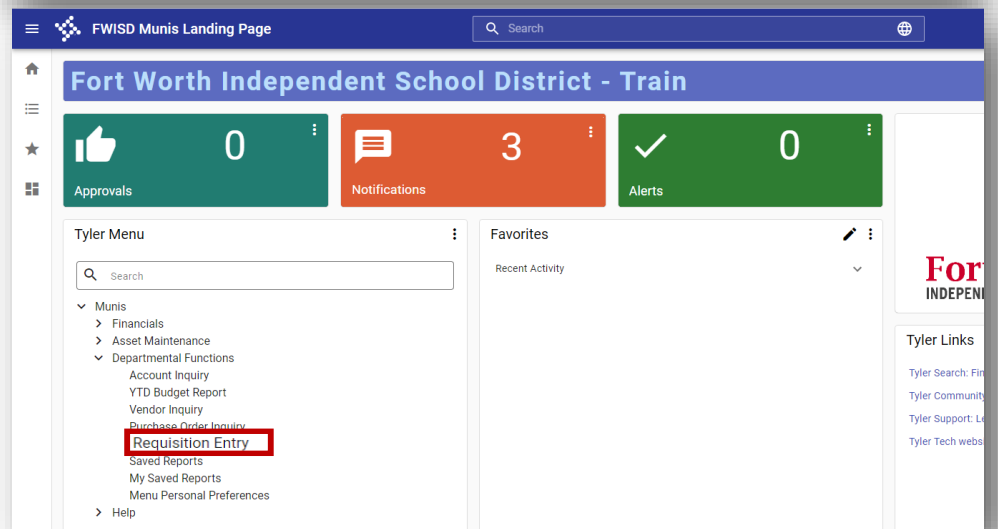
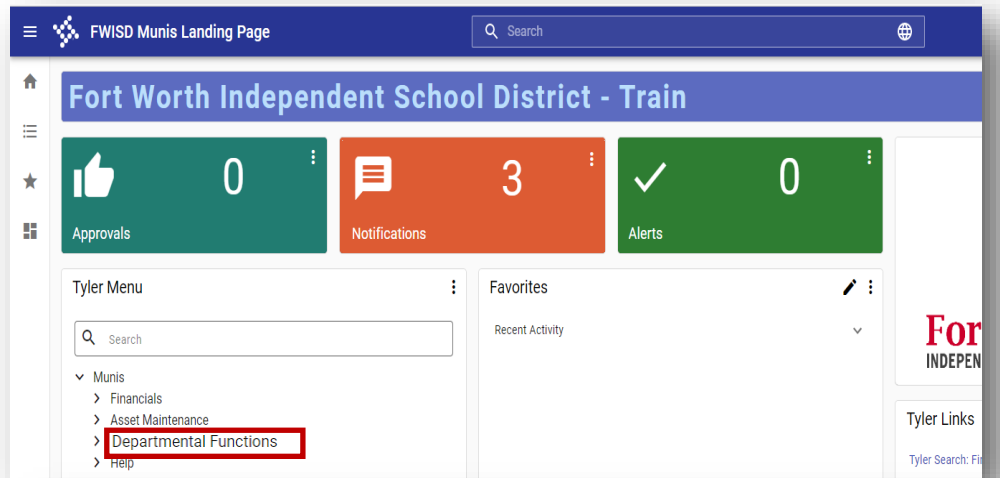


2ND STEP

From the Tyler Menu:

Click Departmental Functions.

Click Requisition Entry.



3RD STEP

The Requisition window opens.

Click Search.

Search for the rejected requisition using the requisition number.

Click on Accept.

The top screenshot shows the 'Requisition Entry [TRAIN DATABASE Jan 25 2022]' window. The 'Search' button in the top toolbar is highlighted with a red arrow. The window displays various fields for requisition entry, including Main Information, Vendor Information, and Line Items.

The bottom screenshot shows the 'Requisition Entry [FWISD Live Data]' window. The 'Accept' button in the top toolbar is highlighted with a red arrow. The window displays the same fields as the top screenshot, but with specific data entered, such as 'Requisition number' 12228024 and 'Status' Rejected.

4TH STEP

Click Notes to see rejection note.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' window with the 'Notes' tab selected. A red arrow points to the 'Notes' button in the top toolbar. The window displays detailed information about a rejected requisition, including Main Information, Vendor Information, and Line Items.

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor
1					ITEM: Amazon Basics Legal/Wide Ruled 8.5 x 11.75-	(23825) AMAZON.COM
2					ITEM: Post-it Notes, 4x6 in, 5 Pads, America's #1	(23825) AMAZON.COM
3					ITEM: Scotch Magic Tape, 6 Rolls, Numerous Applic	(23825) AMAZON.COM

5TH STEP

The Requisition Notes window opens.

Click on Reject.

Note: Click on Accept to view the note details.

If Accept is not clicked and the end user only corrects what is on the first line, the requisition may be rejected again for other items that were not corrected.

The screenshot shows the 'Requisition Notes' window. At the top is a blue header with the title 'Requisition Notes'. Below the header is a toolbar with icons for Back, Accept, Cancel, Search, Output, Print, Display, PDF, Save, Excel, and Word. The main area contains a table with the following data:

Type	Line	Dated	By User	Description
Reject	0	03/10/2022	kaleisa.jackson	REJECTED ENTERED AFTER THE CUT OFF FOR THE

6TH STEP

After the rejection note has been reviewed, make note of correction(s) to be made.

Click Back to return to the requisition notes in list form.

Click Back to return to the requisition main page.

The screenshot shows two windows. The top window is titled 'Rejection Note' and contains a 'Back' button with a red arrow pointing to it. Below the button is a form with the following fields:

Requisition: 2022, 12228024
 Date/Time: 2022-03-10 16:53
 Created By: kaleisa.jackson
☐ Print on PO.

The bottom window is titled 'Requisition Notes' and shows the same table as the first screenshot:

Type	Line	Dated	By User	Description
Reject	0	03/10/2022	kaleisa.jackson	REJECTED ENTERED AFTER THE CUT OFF FOR THE

7TH STEP

On the main page of the requisition, click Activate.

This will move the status of the requisition to (4) Allocated or (2) Created.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' main page. The top toolbar contains various icons, and the 'Activate' icon (a person with a checkmark) is highlighted with a red arrow. The main form displays requisition details for 'IT TRAINING and Compliance', including department, fiscal year, requisition number, and vendor information.

8TH STEP

The requisitions is now ready for corrections to be made.

Click Line Items.

This screenshot is identical to the previous one, showing the 'Requisition Entry [FWISD Live Data]' main page. In this step, the 'Line Items' icon (a document with a list) in the top toolbar is highlighted with a red arrow.

9TH STEP

Click on Update while on the line item page.

Make correction(s) to the items per the rejection note.

Click Accept after corrections are made on each line item.

The screenshot shows the 'Line Items' page. The top toolbar has icons for 'Add', 'Update', 'Delete', 'Copy', 'Mass Allocate', and 'Shop Online'. The 'Update' icon (a document with a pencil) is highlighted with a red arrow. The main form displays details for a specific line item, including quantity, commodity, inventory item, location, type, and description.

10TH STEP

When all corrections are completed, click Accept.

The screenshot shows the 'Line Items' form with the 'Accept' button highlighted by a red arrow. The form displays details for Requisition Number 12228024, Line 1, including quantity, unit price, and description: 'ITEM: Amazon Basics Legal/Wide Ruled 8.5 x 11.75- Inch Lined Writing Note Pads - 12-Pack (50-sheet Pads), White'.

11TH STEP

Click Back to return to the requisition main page.

The screenshot shows the 'Line Items' form with the 'Back' button highlighted by a red arrow. The form displays the same requisition details as the previous step.

12TH STEP

If status is in Created, Click Allocate.

Otherwise the status should be Allocated

This will move your status to (4) Allocated.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' form. The 'Allocate' button in the top right toolbar is highlighted with a red arrow. The form displays details for Requisition Number 12228024, including vendor information (AMAZON.COM) and shipping information (FWISD IT TRAINING & COMPLIANCE).

13TH STEP

Click Release.

This will release the requisition to the budget owner for approval and move the status to (6) Released.

Note: If using title funds, the requisition will go to Grants for their review and/or approval. Grants will reject a requisition if they need more information or if the grants funds listed on the requisition cannot be used for the purchase.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' form. The status is set to (6) Released. The form includes sections for Main Information, Vendor Information, and Shipping Information. The status field is highlighted with a red arrow pointing to the 'Released' option.

Main Information		Status	
Dept/Loc *	346 ... IT TRAINING and Compliance	Status	(6) Released
Fiscal year *	2022 • Current ○ Next	Entered *	04/13/2022
Requisition number *	12228024	PO expiration	06/30/2022
General commodity	ePro3 ... EPROCUREMENT CC FOR AMAZON.COM	Receive by	Quantity ○ Amount
General description	EPROCUREMENT CC FOR AMAZON.COM		

Vendor Information		Shipping Information	
Vendor	23825 ... Committed	Ship to *	346 ...
Name	AMAZON.COM		FWISD IT TRAINING & COMPLIANCE
PO mailing	0 ...		100 N. UNIVERSITY DR, STE 224
	410 TERRY AVENUE NORTH		FORT WORTH TX 76107
		Email	aracely.chavez@fwisd.org
		Reference	Kim Cummings

Once the budget owner approves the requisition, the status changes to (8) Approved. When a requisition is status (8), the requisition is with Purchasing.

The screenshot shows the 'Requisition Entry [FWISD Live Data]' form. The status is set to (8) Approved. The form includes sections for Main Information, Vendor Information, and Shipping Information. The status field is highlighted with a red arrow pointing to the 'Approved' option.

Main Information		Status	
Dept/Loc *	346 ... IT TRAINING and Compliance	Status	(8) Approved
Fiscal year *	2022 • Current ○ Next	Entered *	04/13/2022
Requisition number *	12228024	PO expiration	06/30/2022
General commodity	ePro3 ... EPROCUREMENT CC FOR AMAZON.COM	Receive by	Quantity ○ Amount
General description	EPROCUREMENT CC FOR AMAZON.COM		

Vendor Information		Shipping Information	
Vendor	23825 ... Committed	Ship to *	346 ...
Name	AMAZON.COM		FWISD IT TRAINING & COMPLIANCE
PO mailing	0 ...		100 N. UNIVERSITY DR, STE 224
	410 TERRY AVENUE NORTH		FORT WORTH TX 76107
		Email	aracely.chavez@fwisd.org
		Reference	Kim Cummings