

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.



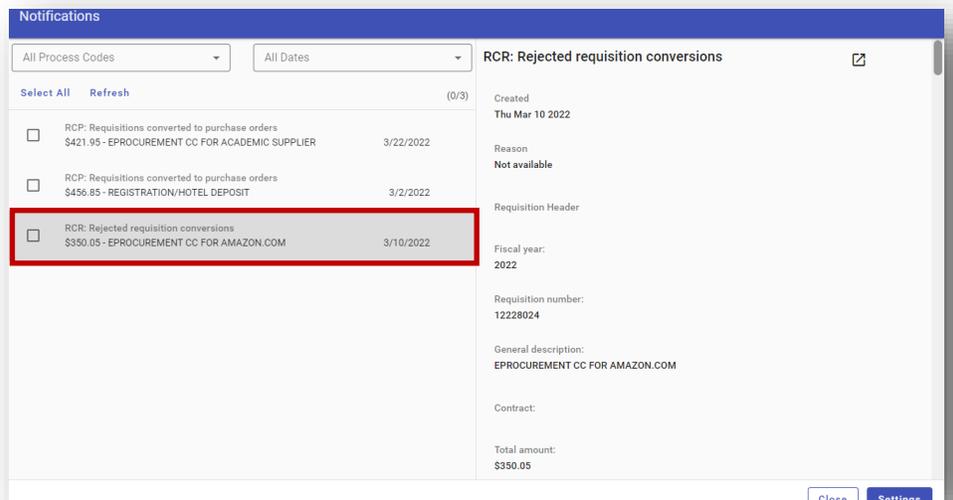
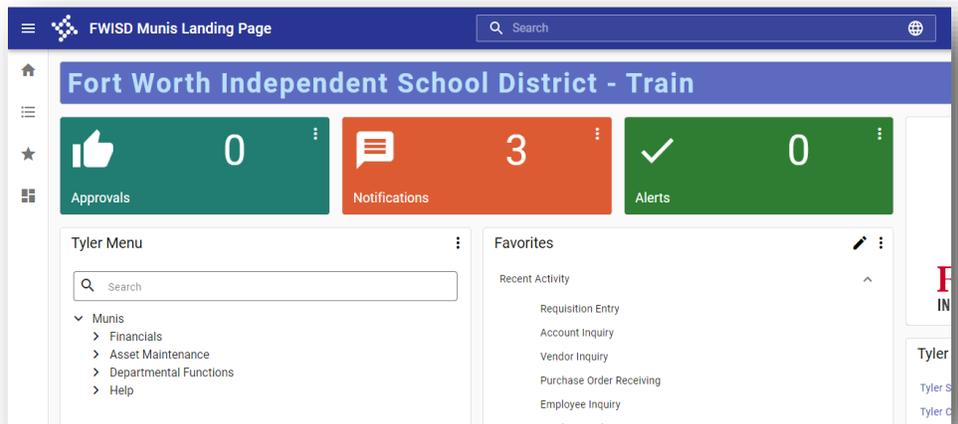
Locate and click on the Munis icon



One way to find rejected requisitions:

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

Make note of the rejected requisition number

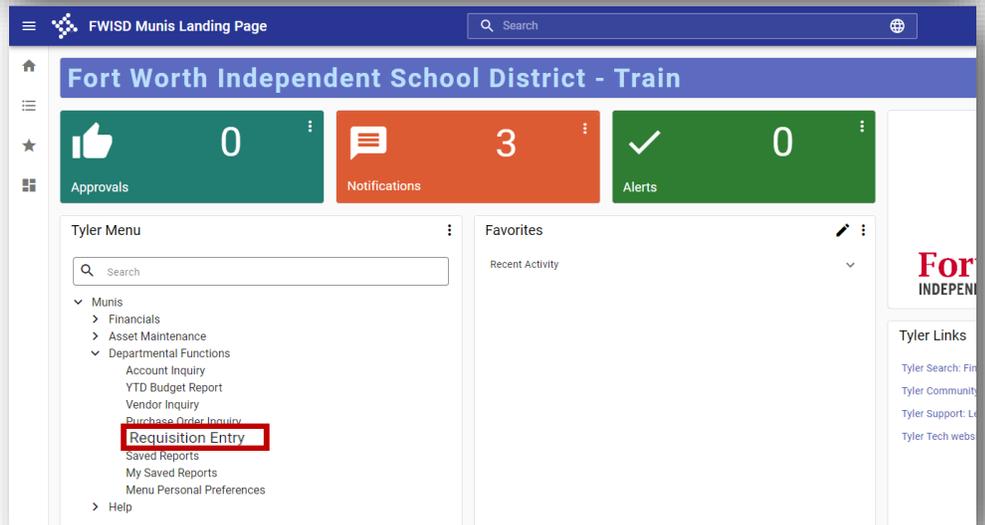
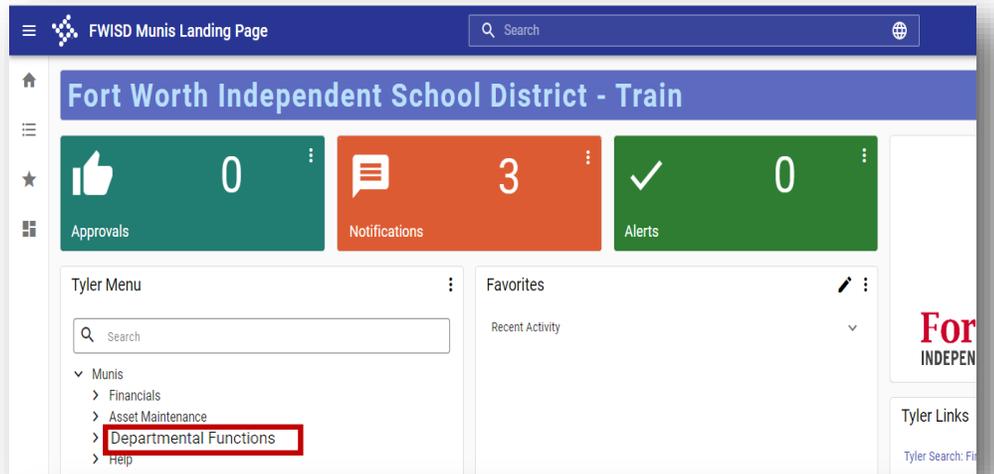


2ND STEP

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.

4TH STEP

Click Notes to see rejection note.

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

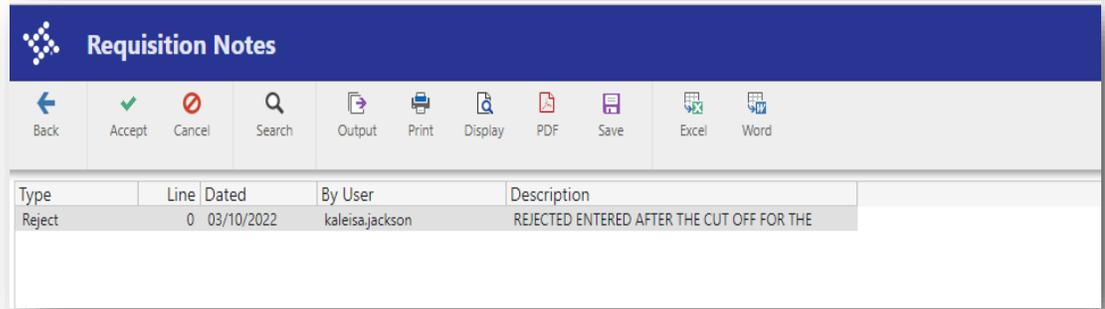
5TH STEP

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.

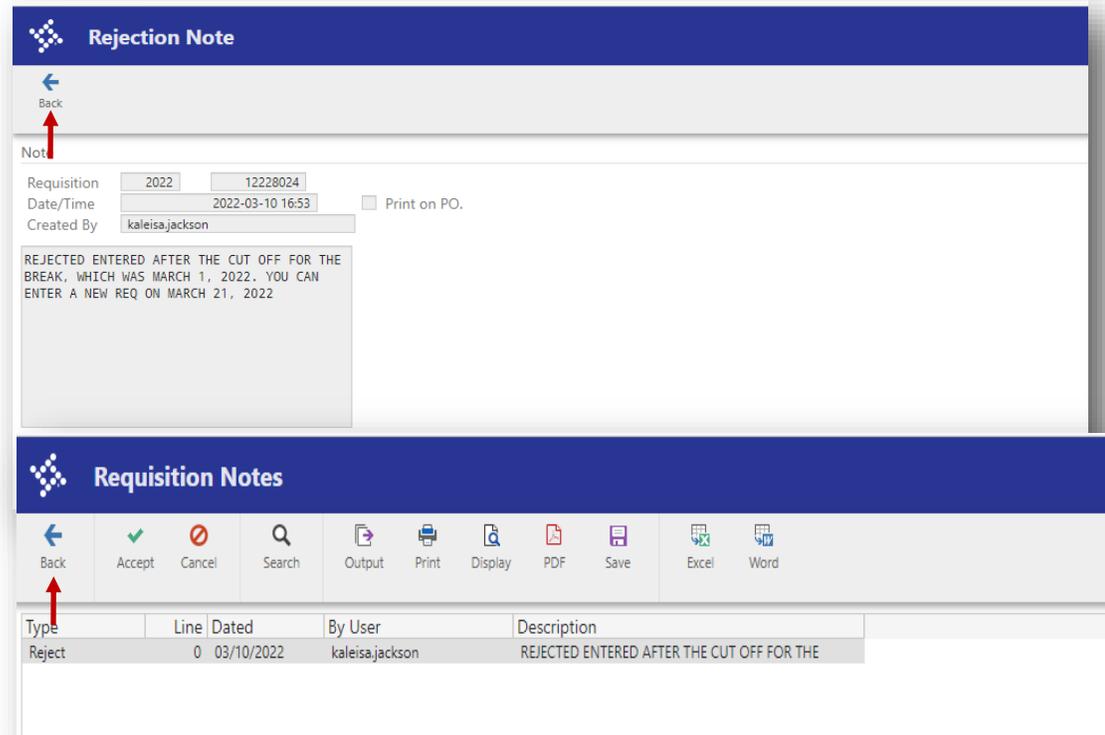


6TH STEP

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.

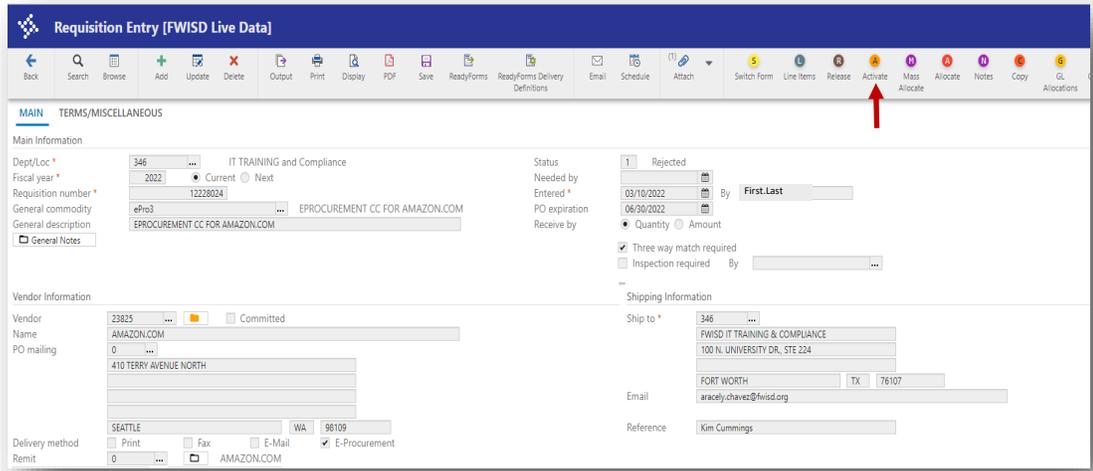
Click Back to return to the requisition main page.



7TH STEP

On the main page of the requisition, click Activate.

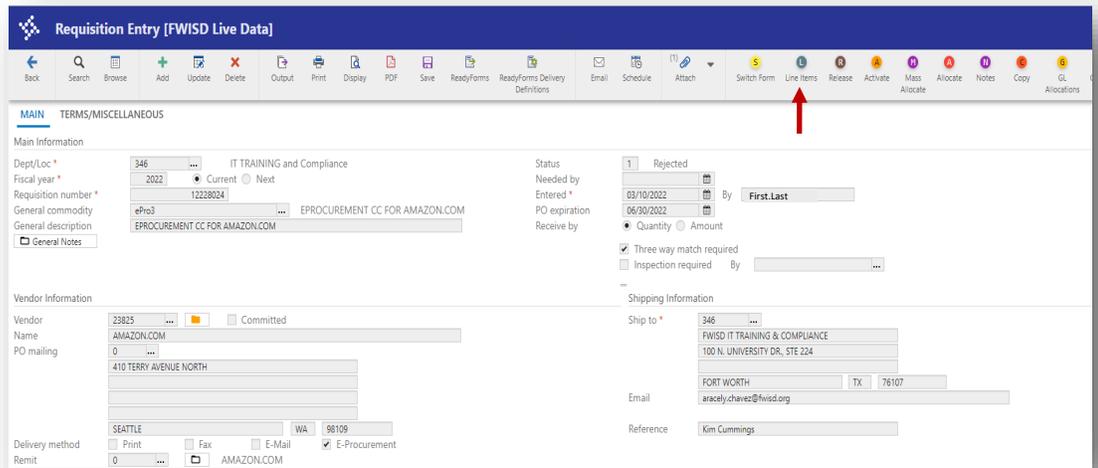
This will move the status of the requisition to (4) Allocated or (2) Created.



8TH STEP

The requisitions is now ready for corrections to be made.

Click Line Items.

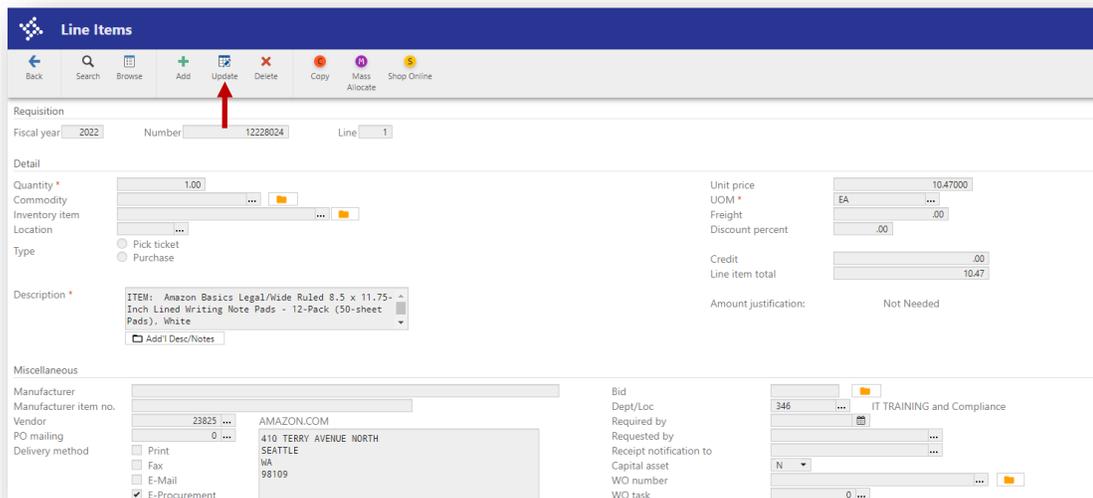


9TH STEP

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.



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 includes fields for Requisition (Fiscal year: 2022, Number: 12228024, Line: 1), Detail (Quantity: 1.00, Unit price: 10.47000), Description (Amazon Basics Legal/Wide Ruled 8.5 x 11.75-Inch Lined Writing Note Pads - 12-Pack (50-sheet Pads), White), and Miscellaneous (Manufacturer: AMAZON.COM, PO mailing: 410 TERRY AVENUE NORTH).

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 content is identical to the previous screenshot, showing the 'Line Items' form with the 'Back' button highlighted.

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 corner is highlighted with a red arrow. The form displays Main Information (Dept/Loc: 346 IT TRAINING and Compliance, Fiscal year: 2022, Requisition number: 12228024), Vendor Information (Vendor: 23825 AMAZON.COM, PO mailing: 410 TERRY AVENUE NORTH), and Status (4 Allocated). Other fields include 'Needed by', 'Entered', 'PO expiration', 'Shipping Information', and 'Reference'.

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.

Requisition Entry [FWISD Live Data]

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email Schedule Attach (1) Switch Form **Release** Activate

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 IT TRAINING and Compliance Status 6 Released 4 Allocated

Fiscal year * 2022 Current Next Needed by 04/13/2022 Entered * By First.Last

Requisition number * 12228024 PO expiration 06/30/2022 Receive by Quantity Amount

General commodity ePro3 EPROCUREMENT CC FOR AMAZON.COM

General description EPROCUREMENT CC FOR AMAZON.COM

General Notes

Vendor Information

Vendor 23825 Committed

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 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.

Requisition Entry [FWISD Live Data]

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email Schedule Attach (1) Switch Form Line Items Release Activate

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc * 346 IT TRAINING and Compliance Status 8 Approved

Fiscal year * 2022 Current Next Needed by 04/13/2022 Entered * By First.Last

Requisition number * 12228024 PO expiration 06/30/2022 Receive by Quantity Amount

General commodity ePro3 EPROCUREMENT CC FOR AMAZON.COM

General description EPROCUREMENT CC FOR AMAZON.COM

General Notes

Vendor Information

Vendor 23825 Committed

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 Kim Cummings