



Requisition Entry – Special Features

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1. ADDING COMMENTS

When you need to add a comment to your requisition **always** place those comments in **VENDOR/SOURCING NOTES** on the header screen of your requisition. Please do not put notes in any other portion of your requisition – either on the head or the line.

Requisition Entry [MMSD - Test]

Main Information

Dept/Loc * 511 BUDGET PLANNING & ACCTNG OFFIC

Fiscal year * 2021 Current Next

Requisition number * 7373

General commodity

General description Flinn Scientific

General Notes

Status 6 Released

Needed by 05/01/2021

Entered * 03/16/2021 By B728654

PO expiration

Receive by Quantity Amount

Three way match required

Inspection required By

Project accounts applied

Vendor Information

Vendor 524 Committed

Name FLINN SCIENTIFIC INC *

PO mailing 0

QUOTE #21139

PO BOX 219

BATAVIA IL 60510-0219

Delivery method Print Fax E-Mail E-Procurement

Remit 9001 FLINN SCIENTIFIC INC

Shipping Information

Ship to * 0000CS

CENTRAL RECEIVING

4711 PFLAUM ROAD

MADISON WI 53718

Email

Reference

Vendor/Sourcing Notes Vendor Quotes (0)

1 of 7 Asterisk indicates that additional notes exist for the line item.

1. Enter comment in box
2. Check “print on PO” if you want the comment printed with the PO
3. Click Accept
4. Click Back to return to the requisition header record

To close out of this note screen click on return. This takes you back to the header screen.

Vendor Sourcing Notes

Back Accept Cancel Print On PO

Note

Requisition 2021 7373

Date/Time 2021-03-18 09:53 Print on PO.

Created By B728654

If you want your note to print on PO, check the box

2. SPLITTING COST BETWEEN MULTIPLE ACCOUNT NUMBERS

- Once you're added the account, tab into the Amount field and adjust the amount to what should be charged to that account (note that it will default to the amount of the line).
- Tab until you get to the next line, change the account, and tab to the Amount field and adjust the amount. Repeat until the line has been fully charged
- Click Accept (If you try to click this before your amounts are equivalent it will give you a warning and you will not be allowed to proceed.)
- Click Back to return to the header record or + to add another line.

Line Items

Back Accept Cancel Search Delete Budget

Requisition
Fiscal year 2021 Number 7373 Line 1

Detail
Quantity 1.00 Unit price 299.00000
Commodity UOM EACH
Inventory item Freight .00
Location Discount percent .00
Type Pick ticket Purchase
Credit .00
Line item total 299.00
Description 85-652 - Climbing Rope
Amount justification: Not Needed

Miscellaneous
Manufacturer
Manufacturer item no.
Vendor 524 FLINN SCIENTIFIC INC *
PO mailing 0
Delivery method Print Fax E-Mail E-Procurement
Bid
Dept/Loc 511 BUDGET PLANNING & ACCTNG OFFIC
Required by 05/01/2021
Requested by
Receipt notification to
Capital asset N
WO number
WO task
Remit 9001 FLINN SCIENTIFIC INC
Notify buyer
Vendor item no.
1099 box

Seq	T	Account	Description	Amount	GL Bud
01	Expense	10.523.0411.258200.000.0000.000.	Purchasing Internal S	100.00	U
02	Expense	10.511.0411.252000.000.0000.000.	BPA Of Fiscal	50.00	A
03	Expense	10.513.0411.252000.000.0000.000.	Finance Sv Fiscal	149.00	

3. STATUS OF A REQUISITION

The status of your requisition is clearly displayed near the top right hand corner of your requisition header screen.

The screenshot shows the 'Requisition Entry [MMSD - Test]' interface. The status is 'Released' (6), indicated by a red arrow. The 'Main Information' section includes: Dept/Loc (511), Fiscal year (2021), Requisition number (7373), and General description (Flinn Scientific). The 'Vendor Information' section shows Vendor (524) and Name (FLINN SCIENTIFIC INC *). The 'Shipping Information' section shows Ship to (0000CS) and Address (CENTRAL RECEIVING, 4711 PFLAUM ROAD, MADISON). The status is 'Released' (6) with a red arrow pointing to it. Other fields include 'Needed by' (05/01/2021), 'Entered' (03/16/2021), and 'By' (B728654).

As your requisition moves through various approvals or processes the status changes. Please note the following status categories:

Status #	Status Title	Status Definition
2	CREATED	Header information has been entered but requisition lines/account #s do not exist.
4	ALLOCATED	Header and requisition lines w/GL account numbers have been entered. No processes can happen until you “release” the requisition.
6	RELEASED	Requester has completed the requisition and released it to move forward in the approval process.
8	APPROVED	Requisition has moved through approval process successfully and requisition is available to Purchasing for further action.
0	CONVERTED	A purchase order has been created for this requisition.
1	REJECTED	Requisition has been sent back to originator for further action. Originator needs to “activate” to do necessary updates.

STATUS OF WORKFLOW

You can determine where your requisition is in terms of the approval process – i.e. who needs to approve prior to further action by Purchasing. Toward the bottom of your requisition header screen you can find a line titled **WORKFLOW**.

Requisition Entry [MMSD - Test]

Vendor: 28385 THE ACHIEVEMENT NETWORK LTD

Ship to: 09850D ASSESSMENT OFFICE - RM 205

PO mailing: 0 1 BEACON ST STE 2200 BOSTON MA 02108-3106

Delivery method: Print Fax E-Mail E-Procurement

Remit: 0 THE ACHIEVEMENT NETWORK LTD

Line Items:

Line	Commodity	Inv Item	Inv item loc	Inv tran type	Description	Vendor
1					Program Fees	(28385) THE ACHIEVEMENT NETWORK

Total amount: 99000.00

Workflow:

My Approvals Approve Reject Forward Hold **Approvers**

77 of 82 Asterisk indicates that additional notes exist for the line item.

Click on the APPROVER button and you can see what approvals are needed on this requisition and who has/has not yet approved.

Work Flow Status

Originator:

Name: Jamie Anderson

Approvers' comments:

Name	Action taken date	Action taken	Action	Comment

These steps have been approved. You can click on the arrow to see the detail

Step	Status	Activated Date	Activated TI
35	Complete (Approved)		
40	Complete (Approved)		
75	In Progress		
Any approver from this group c Group Current			
Board of Education		08/21/2020	15:18
Kelly Ruppel		08/21/2020	15:18
By source business rule - Any Group Complete			

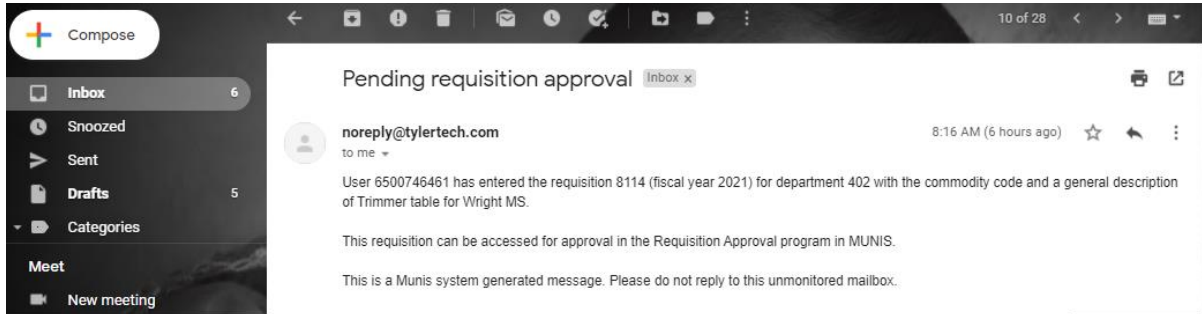
Generate Chart Expand All Collapse All Expand In Progress

This is the detail for the Board of Education's step

Details	
Approver:	Board of Education Source Bus Rule: 798
Status:	Current
Approval type:	AMT - Dollar Based
Step:	75
Action needed:	Approve
Active date:	08/21/2020
Active time:	15:18
Time limit:	
Approver Group:	Any approver from this group can complete the group

An approver can approve a requisition directly from the requisition or through “My Workflow” on the Munis HUB (main screen)

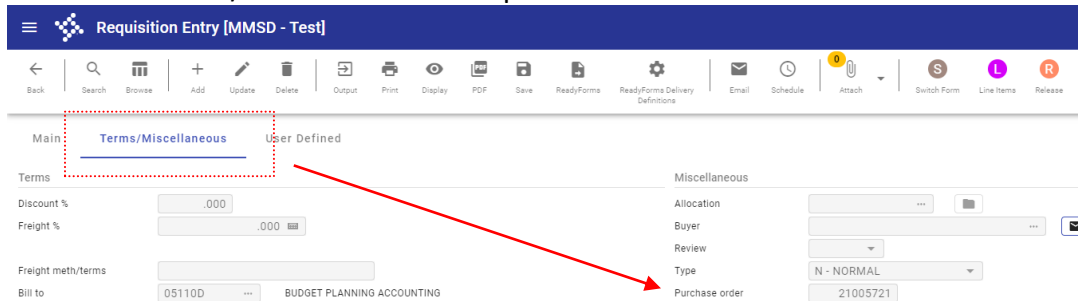
The approver will also receive a system generated e-mail indicating that a requisition needs approval. They can then go into their Munis “Workflow” to find/approve the requisition.



In the Munis system you will also be automatically notified when Purchasing creates and issues a purchase order related to your requisition. You will receive an e-mail similar to the e-mail shown below.



Once a purchase order has been created, you can also see that particular purchase order number if you happen to go back to Requisition Entry to look at your requisition. Go to the “Terms/Misc” tab on the requisition header as shown



4. REQUISITIONS RETURNED TO ORIGINATOR

The Munis system provides a method for a requisition to be returned to the originator by approvers in the process AND by Purchasing Services. (Purchasing will reject a requisition and return it to you to correct something on the requisition or to tell you that this item can't be ordered by MMSD.)

You will receive an e-mail notice if a requisition that you entered is rejected.

A comment is required for rejected requisitions

From: <noreply@tylertech.com>
Date: Mon, Aug 10, 2020 at 3:15 PM
Subject: Pending requisition rejected

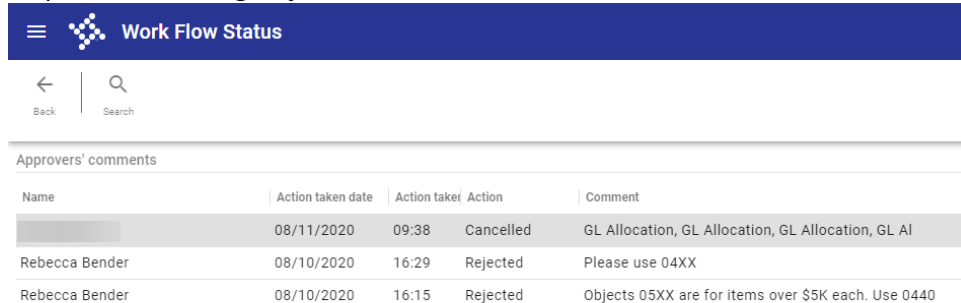
The following requisition has been rejected by 6500728654. 6500728654's comment was:
Objects 05XX are for items over \$5K each. Use 0440

User 6500705471 has entered the requisition 1703 (fiscal year 2021)
for department 701 with the commodity code and a general description of BOOKCASE 5 SHELF H10755 BOURBON CHERRY.

This is a Munis system generated message. Please do not reply to this unmonitored mailbox.

Once you receive this notice you should go into Munis Requisition Entry and find this particular requisition. From Requisition Entry select **Search** on the tool bar and enter in the fiscal year and your requisition number.

At the bottom, click the "Approvers" tab to view notes the approver provided related to rationale for rejecting the requisition. In this case it was noted that the req had the wrong object code and should have used 0440



The screenshot shows the 'Work Flow Status' interface. At the top, there is a navigation bar with a menu icon and the text 'Work Flow Status'. Below this is a search bar with a back arrow and a search icon. The main content area is titled 'Approvers' comments' and contains a table with the following data:

Name	Action taken date	Action take	Action	Comment
	08/11/2020	09:38	Cancelled	GL Allocation, GL Allocation, GL Allocation, GL AI
Rebecca Bender	08/10/2020	16:29	Rejected	Please use 04XX
Rebecca Bender	08/10/2020	16:15	Rejected	Objects 05XX are for items over \$5K each. Use 0440

You now have two choices:

1. Delete the requisition if you don't want to proceed further
2. Make necessary corrections to the requisition so that approval is granted

To delete this requisition go back to the header screen (by clicking on return) for the requisition and select the **Delete button**

To make corrections to the requisition you will first need to select the **Activate** on the ribbon on the top of your screen.

Once you do that notice that the status of the requisition changes from (1) Rejected to (4) Allocated. You can then go and make the necessary changes to the requisition and once you do that make certain to select Accept to properly save those changes.

ReadyForms Delivery Definitions | Email | Schedule | Attach | Switch Form | Line Items | Release | **Activate** | Mass Allocate

Status: 1 Rejected
Needed by: 07/01/2021
Entered *: 02/09/2021 By: B734162
PO expiration:
Receive by: Quantity Amount

Status: 4 Allocated
Needed by: 07/01/2021

After you have completed and saved the necessary changes you will once again select the **Release** button on the ribbon at the top of your screen. This will change the status to (6) Released and your requisition will once again be available for the proper approvals.

Email | Schedule | Attach | Switch Form | Line Items | **Release** | Activate | All

Status: 6 Released
Needed by: 07/01/2021
Entered *: 03/18/2021 By: B734162