

## **Requisition Approval - Workflow**

1. Requisition approval is available on your Munis dashboard.

=	🔆 Basic Page	<b>Q</b> Search					
ħ	Tyler Menu	•	11 <sup>:</sup>		0 :		0 *
≣	Q Search			~	U		U U
*	✓ Munis	Approvals		Alerts		Notification	s
	> Financials						
	Human Capital Management     General Revenues						
	<ul> <li>Property Revenues</li> </ul>						

2. To open the Approvals list, click on the blue box labeled Approvals. There are 11 requisitions to approve on this list. Click on an item to see a bit of detail on the right. You can click the <sup>12</sup> to be taken to the requisition for additional detail

Appro	ovals		
You are	currently receiving forwarded work from		
All Pro	All Dates	•	REQ: Requisitions pending approvals
Select	All Refresh REQ: Requisitions pending approvals	(0/11)	Created Wed Feb 10 2021
x 🗆	\$60,000.00 - AHM-142-821002893-Brownfield-Abatement Design Cons 2/10/2021		Reason amount of this requisition is greater than the threshold 35,000.00
c a 🗆	REQ: Requisitions pending approvals \$90,000.00 - AHM-141-821002890-Brownfield-Abatement Design Cons 2/10/2021		Requisition Header
×	REQ: Requisitions pending approvals \$46,000.00 - AHM-143-821002891-Brownfield-Abatement Design Cons 2/10/2021		Fiscal year:
	REQ: Requisitions pending approvals \$61,000.00 - AHM-145-821002892-Brownfield-Abatement Design Cons 2/10/2021		2021 Requisition number:
	REQ: Requisitions pending approvals \$40,000.00 - AHM-013-821002894-Brownfield-Abatement Design Cons 2/10/2021		6537 General description:
	REQ: Requisitions pending approvals \$48,682.00 - MMS,340,821004018,Fwd Elec,UW#17-5888 1/26/2021		AHM-013-821002894-Brownfield-Abatement Design Cons
			Close Settings

3. Click the boxes to the left for each item you would like to process, and then select if you'd like to approve, reject, forward to another approver, or place it in a 'held' status.

	cess Codes	-	REQ:
AILFIU	All Dates	•	NEQ.
Select	All Refresh	(2/11)	Crea
	REQ: Requisitions pending approvals		Wed
	\$60,000.00 - AHM-142-821002893-Brownfield-Abatement Design Cons		
	2/10/2021		Rea
	REQ: Requisitions pending approvals		am
	\$90,000.00 - AHM-141-821002890-Brownfield-Abatement Design Cons		
	2/10/2021		Rec
	REQ: Requisitions pending approvals		
$\checkmark$	\$46,000.00 - AHM-143-821002891-Brownfield-Abatement Design Cons		<b>F</b> :
	2/10/2021		Fise 202
_	REQ: Requisitions pending approvals		202
$\checkmark$	\$61,000.00 - AHM-145-821002892-Brownfield-Abatement Design Cons 2/10/2021		Rec
			653
_	REQ: Requisitions pending approvals		000
	\$40,000.00 - AHM-013-821002894-Brownfield-Abatement Design Cons 2/10/2021		Ger
	2/10/2021		AHI
	REQ: Requisitions pending approvals		
	\$48,682.00 - MMS,340,821004018,Fwd Elec,UW#17-5888 1/26/2021		

Approval Options	Description/Directions
Approve	Approve the req, this function makes it available for Purchasing to turn into a PO; Add comments if desired.
Reject	Returns the req to the requisitioner. They will receive an e-mail notice; comment is required.
Forward	This is not set-up for anyone, but can forward reqs to one other person for their approval.
Hold	Put a req on Hold

4. When Approve is clicked, the Optional Comment window appears. Enter comment if you have one and then click submit. Clicking cancel will not approve the req.

nding approvals	Wed Feb 10 2021	
2-8210026 Approve 2 Item(s)		ld 35,0
1-8210028 Comment		
nding app 5-821002892-Brownfield-Abatement Design Cons	Cancel Subm	t

## **Requisition Approval – Manual**

If you cannot access workflow, you can approve requisitions through the Munis Menu

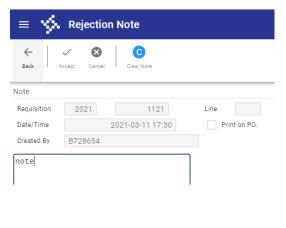
Munis > Financials > Purchasing > Purchase Order Processing > Requisition Approval

= 3	🗴 Requisitio	n Approvals [MI	MSD - Test]				٥	? RL
← Back	Q Dutput	Print Save	Select Sort		P			
Code	Year	Req # Process	Entered by	Description	Туре	Amount Justification	RevC	Comment
	2021	00000257 REQ	B737236	Alpha Bakery	AMT	68,500.00 Not Needed		
	2021	00000382 REQ	B737236	RFP 4010 - RFP for Fluid Mi	k Vendor AMT	419,000.00 Not Needed		
	2021	00000396 REQ	B737236	Pepsi	AMT	77,000.00 Not Needed		

- 1. Click on Select
- Through the dropdown menu, you can approve, reject (with a comment), forward or hold the requisition.

≡ 🐝 ← Back Acc	∕ ⊗	ion Approv	als [MMS View Requisitions	SD - Test]	The "View Requisition" button takes you to Requisition Entry where you can view the req detail. You can also approve from Req Entry by clicking the approval at the bottom of the page.				
Code	Year	Req #	Process	Entered by	Description	1.0	Anoune	nment	
Approve 👻	2021	00000257	REQ	B737236	Alpha Bakery	AMT	68,500.00	Not Needed	
Approve 👻	2021	00000382	REQ	B737236	RFP 4010 - RFP for Flui	d Milk AMT	419,000.00	Not Needed	
	2021	00000396	REQ	B737236	Pepsi	AMT	77,000.00	Not Needed	
Reject 👻	2021	00001121	REQ	B746370	AVID Digital XP	AMT	68,000.00	Not Needed	
	2021	00001683	REQ	B729465	The Achievement Netwo	ork, LTD ( AMT	99,000.00	Not Needed	
	2021	00005870	REQ	B749344	MMS,340,821004018,F	wd Elec,UW# AMT	48,682.00	Not Needed	
•	2021	00006532	REQ	B727613	AHM-142-821002893-B	rownfield-A AMT	60,000.00	Not Needed	

- 3. When you are finished, click Accept or push enter.
  - a. Note: if you reject, you'll get a pop-up that says "Reject will close the requisition. Are you sure?"
    - i. You then have to add a note since it is a rejected item
    - ii. Click Add. Enter comment. Click Accept
    - iii. Click Back.
- 4. Click Process 🔍



≡ 🐝 Requisition Approvals [MMSD - Test]											
← Back	Q Search	Output	<b>P</b> rint	Save	Select	R Sort	Approve Others	D Approve Dept	Approval Comments	A Approve All	Process