

## **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<br>Wed Feb 10 2021   |
| x 🗆      | \$60,000.00 - AHM-142-821002893-Brownfield-Abatement Design Cons<br>2/10/2021  |        | Reason<br>amount of this requisition is greater than the threshold 35,000.00 |
| c<br>a 🗆 | REQ: Requisitions pending approvals<br>\$90,000.00 - AHM-141-821002890-Brownfield-Abatement Design Cons<br>2/10/2021 |        | Requisition Header   |
| ×        | REQ: Requisitions pending approvals<br>\$46,000.00 - AHM-143-821002891-Brownfield-Abatement Design Cons<br>2/10/2021 |        | Fiscal year:   |
|          | REQ: Requisitions pending approvals<br>\$61,000.00 - AHM-145-821002892-Brownfield-Abatement Design Cons<br>2/10/2021 |        | 2021<br>Requisition number:  |
|          | REQ: Requisitions pending approvals<br>\$40,000.00 - AHM-013-821002894-Brownfield-Abatement Design Cons<br>2/10/2021 |        | 6537<br>General description:   |
|          | REQ: Requisitions pending approvals<br>\$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<br>202 |
| _            | REQ: Requisitions pending approvals   |        | 202         |
| $\checkmark$ | \$61,000.00 - AHM-145-821002892-Brownfield-Abatement Design Cons<br>2/10/2021 |        | Rec         |
|              |   |        | 653         |
| _            | REQ: Requisitions pending approvals   |        | 000         |
|              | \$40,000.00 - AHM-013-821002894-Brownfield-Abatement Design Cons<br>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<br>Purchasing to turn into a PO; Add comments if desired. |
| Reject           | Returns the req to the requisitioner. They will receive<br>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<br>Approve 2 Item(s)                            |                 | ld 35,0 |
| 1-8210028<br>Comment                                      |                 |         |
| nding app<br>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

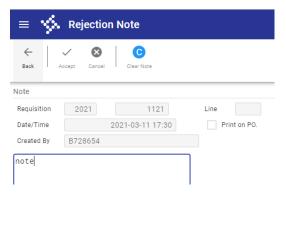
Munis > Financials > Purchasing > Purchase Order Processing > Requisition Approval

| = 3       | 🗴 Requisitio | n Approvals [MI | MSD - Test] |                             |              |                       | ٥    | ? RL    |
|-----------|--------------|-----------------|-------------|-----------------------------|--------------|-----------------------|------|---------|
| ←<br>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.

| ≡ 🐝<br>←<br>Back Acc | ∕ ⊗  | ion Approv | als [MMS<br>View<br>Requisitions | SD - Test] | The "View Requisition" button takes you to<br>Requisition Entry where you can view the<br>req detail. You can also approve from Req<br>Entry by clicking the approval at the bottom<br>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] |             |        |               |      |        |           |                   |                   |                      |                  |         |
|---|-------------|--------|---------------|------|--------|-----------|-------------------|-------------------|----------------------|------------------|---------|
| ←<br>Back                               | Q<br>Search | Output | <b>P</b> rint | Save | Select | R<br>Sort | Approve<br>Others | D<br>Approve Dept | Approval<br>Comments | A<br>Approve All | Process |