

REQUISITION ENTRY IN MUNIS

Work Instructions (PUR-W002)

1. Open the Munis Dashboard in your browser.

https://munis.cmcss.net/

or Open the Munis Prod link on the computer.



- 2. Log In using your CMCSS user name and password.
- 3. From the Tyler Menu select Department Functions >Requisition Entry



4. The Requisition Entry window will open to the Main tab.

Моме	Requisition Entry - Munis [CLARKSVILLE	-MONTGOMERY CO. SCHOOL SYSTEM]	⇔ (? ×
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Main Terms/Miscellaneous			
Main Information			
Dept/Loc	Status		
Fiscal year O Current O Next	Needed by		
Requisition number	PO expiration		
General description	Receive by Quantity Amount		
🛱 General Notes			
Vendor Information		Shipping Information	
Vendor 🗭 🔳 Committed		Ship to	
Name			
PO mailing			
		Email	
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Delivery method Print Fax E-Mail			
Remit 😹			
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Line Items	Venter	Oto Unit Dates Testate Disc # Coulting Testate	Ant CL Annual
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Detail of the Requisition Entry Ribbon

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- 5. To add a new requisition, click on the Add icon (Plus Sign) in the ribbon.
- 6. Enter all necessary information in ALL CAPITAL letters. Use the tab key to navigate to each field within the screens. From the Main Tab on the Requisition Entry Screen, enter information in the following fields. Steps in **BOLD PRINT** are required.

Field	Description								
Dept/Loc	Enter assigned Department or Location code. Click on the list								
	icon located on the right hand side of the filed for a list of valid								
	department and location codes.								
Fiscal Year	The system will automatically populate the fiscal year.								
Requisition number	The system will automatically assign the requisition number.								
General commodity	Click on the List icon to the right of the field for a list of available								
	commodity codes. Select the commodity code the best matches								
	the items being purchased. This box may be left blank if no								
	commodity code matches the purchase.								
General description	Enter a brief description of the items being purchased.								

Field	Description
Status	The system will automatically populate the field with the current
	approval status of the requisition. The following are valid values
	for requisition approvals:
	 1 – Rejected: The requisition has been rejected by an
	approver. Click the Approvers button to view the rejection
	comments. To update a rejected requisition, click the
	Activate button.
	• 2 – Created
	 4 – Allocated: The requisition has been entered and has
	been charged to a general ledger account, but has not
	been released for approval.
	• 6 – Released: The requisition has been released and is
	awaiting approval. Click the Approvers button to see the
	current approval status.
	 8 – Approved: The requisition has been fully approved,
	and is ready to be converted to a purchase order.
	• 0 – Converted: The requisition has been converted to a
	purchase order. The PO number is included on the
	Terms/Miscellaneous tab in Requisition Entry.
Needed by	Enter the date by which the goods or services in the requisition
Enternal .	The system will remulate this field with the surrout date
	The system will populate this field with the user ID of the person
Бу	who optored the requisition
PO expiration	Leave this field blank
	Determines the method by which a purchase order created from
Neceive by	the requisition is received: Quantity or Amount
Vendor	Enter the vendor number. To select a vendor, click on the help
V CHILON	button (to the right of the field) to get a list of current
	vendors. From the alpha listing enter the vendor name and click
	on the Green Checkmark. Double-click to select the vendor from
	the list. The vendor number, name and address will
	automatically be included within the requisition record. Leave
	this field blank if ordering items from the warehouse.
Committed	The system will automatically populate this field if applicable.
PO Mailing	This is the vendor's remit address to be used for the purchase
	order. The address defaults to "0", the main address for the
	vendor's entry. If the purchase order is to be sent to a different
	address than shown, click on the help button (to the right of the
	field) and select the correct address.
Delivery method	The system will default to print.
Remit	This is the address to which payments should be sent. The default
	value is "0" if the vendor does not have any remit addresses on
	record, otherwise the default value is "1". If the incorrect remit
	address is shown, click on the help button (to the right of the
	field) and select the correct address.

Field	Description
Ship to	Enter the location number where the item should be delivered.
	Click on the help button (to the right of the field) to bring up a
	list of available locations.
Email	Enter a contact e-mail address for the shipping location.
Reference	Enter a name to reference on the vendor's shipping document.

- 7. Add/update requisition notes:
 - a. Click General Notes or Vendor/Sourcing Notes to add or update notes associated with the requisition.
 - i. If items requested are greater than \$1,000, but not more than \$25,000, you must obtain three (3) vendor Informal Bids for vendor justification. Use the Formal Bid process for orders over \$25,000. If ordering from a bid, enter the bid number.



- b. Click Add to create a new note. The note text stays with the purchase order throughout its liquidation.
- c. If the note needs to be seen by the vendor or the person converting and printing the PO, in the Note ribbon, click on "Print On PO." Note: Bid information should not be printed on the PO.
- d. Click Accept.
- e. Click Return on the ribbon to return to the Requisition Entry Screen.
- 8. Press the tab key to go to the Terms/Miscellaneous tab.

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Accept Ca	Cel Searc	🔲 Browse b 💽 Query Builde	Add	Update	Delete	Print	Text file	X Excel	Word Email Schedule	0 Attach	Notes Notify	🚉 Audit 🖶 Maplink* 🕕 Alerts*	Return		
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Main T	Main Terms/Miscellaneous														
Terms														Miscellaneous	
Discount	%													Allocation	🖻
Freight %														Buyer	🖃
														Review	V
Freight m	eth/terms													Туре	V
Bill to		-												Purchase order	
Bill to ema	ail														Notify originator when converted to PO/Contract.
Special h	andling			V											Notify originator of overages.

9. Enter the following information. Steps in **BOLD PRINT** are required.

<u>Field</u>	Description					
Discount %	Not a required field. If you have negotiated a discount for the					
	order, then enter the discount percentage.					
Freight %	Do not use. Enter freight as a separate line item on the requisition.					
Freight method/terms	Not a required field. If a specific shipping method or term have					
	been included as part of the requisition, enter them in this field.					
Bill to	This field should always have "Accounts Payable" as the Bill To					
	location unless otherwise approved by the Chief Financial Officer.					
Bill to email	Not a required field.					
Special handling	The system will default to "None". In cases where special handling					
	for the order is required, use the drop down arrow on the right side					
	of the field to select the appropriate handling code.					
Allocation	Leave this field blank. CMCSS is not currently using allocation codes					
	to support the purchasing process.					
Buyer	Leave this field blank. The system will automatically populate this					
	field when the purchase order is converted with the name of the					
	buyer who converts the requisition.					
Review	Leave this field blank.					
Туре	The system will default to "Normal" for a purchase order for					
	specific goods or services. If the order will be for a Not to Exceed					
	amount to be used over a long period of time, select "Blanket"					
	from the drop down menu.					
Purchase order	Leave blank. The system will populate this field with the purchase					
	order number once the requisition has been converted to a					
	purchase order.					
Notify originator when	Check this box to be notified via email when the requisition has					
converted to PO	been converted to a Purchase Order.					
Notify originator of	Check this box if you wish to be notified when a requisition has					
overages	liquidations greater than the specified amount.					

10. Press the tab key to open the Line Items entry screen, or if necessary, go back to the Main tab of the requisition screen and click on the Line Detail button on the left to begin entering line items for the requisition.

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Accept Cancel Search	Deprove	dd Update X Dele Golob Dupl	te al∗ icate Print B Text fil Print PDF Qutput	e Word Excel Email Schedu	Attach Notes Audit Attach Notify I Maplink:	Mass Allocate Return
Requisition	Search	Actions	Output	Office	10015	Menu
Fiscal year 2019	Number	2019	Line 1	Purchase Ord	er 00224472 10/05/2018	
Detail Quantity Commodity Inventory Item Location Type Description	1.00 Pick ticket Purchase	🗭		Unit Price UOM Freight Discount percent Credit Line item total	33.33000 EA .00 .00 .00 33.33	
2000 mp dom			÷	Amount justification	Not Needed	
	🗃 Add'l Desc/Notes]				
Miscellaneous						
Manufacturer Manufacturer item no.					Bid Dopt/Loc	
Vendor	119784	AMAZON.COM LL	С		Required by	
PO mailing	0	410 TERRY AVE	Ν	*	Requested by	
Delivery Method	Print	SEATTLE WA			Receipt notification to	
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Remit	1	MAZON	I CAPITAL SERVICES			
Vendor item no	Vendor/Sourcing P	lotes				
1099 box		$\overline{\nabla}$				
Seq ▼ Org 01 GIH35035	Obj 5 542900	Project De	escription	RHS	Amount GL Bud 33.33 U	
K K 1	of 4 > >					

11. Enter the following information. Steps in **BOLD PRINT** are required. Information must be entered for each line item of the requisition.

Field	Description
Line #	The system will default the line item #.
Detail	
Quantity	Enter the quantity of the item being requested. If this is a blanket PO (issued for an amount not to exceed), enter the dollar amount as the quantity.
Commodity	Click on the List icon to the right of the field for a list of available commodity codes. Select the commodity code the best matches the items being purchased. This box may be left blank if no commodity code matches the purchase.
Inventory Item	If the requisition is for an inventory (warehouse) item, enter the inventory item number.

Field	Description
Location	If the requisition is for an inventory (warehouse) item, click on the
	list icon to the right of the field for a list of available locations.
	Select the location.
Туре	If the requisition is for an inventory (warehouse) item, select pick
	ticket if ordering items from the warehouse. Select Purchase if
	ordering inventory items for the warehouse.
Description	Enter a description of the requisition line item.
Unit Price	Enter the price per unit for the item. If this is a blanket PO (issued
	for an amount not to exceed), enter the price as \$1.00.
UOM	The default unit of measure is "Each". Select the unit of measure
	for the item (e.g. Each, Box, Pound). Click on the list icon to the
	right of the filed for a list of available options.
Freight	Do not use. Enter a separate line item on the requisition.
Discount Percent	If required, enter the discount percentage granted by the vendor.
Credit	If required, enter the credit amount applied to the line item.
Line Item Total	This box displays the total amount for the current line items.
Amount Justification	This field indicates whether the justification conditions established
	for the department have been met. If conditions have not been
	met, this field reads "Not Needed." If a justification is needed, you
	must enter a justification note by clicking the Add'l Desc/Notes
	button.
Miscellaneous	
Manufacturer	Enter the manufacturer of the item.
Manufacturer Item No.	Enter the manufacturer's item number.
Vendor	The vendor selected in the Main tab of the requisition entry screen
	will automatically default into this field.
Vendor Item No.	Enter the vendor's item number.
1099 box	Do not make an entry in this field.
Bid	Do not make an entry in this field.
Dept/Loc	The Dept/Loc code selected in the Main tab of the requisition entry
	screen will automatically default to this field. If the Dept/Loc must
	be different for the line item being entered, click on the List Icon
	and select a different Dept/Loc.
Required by	If the required by date is different from the Needed by date on the
	Main tab of the requisition entry screen, enter the date in this field
	or click on the Calendar Icon and select a date. This is for
	information only.
Requested by	This field will default to the user ID of the person entering the
	requisition.
Receipt notification to	If a Munis user requires notification when the requested item is
	received using the Purchase Order Quick Receipt or Purchase
	Order Receiving program, enter the Munis User ID of the person
	that should be notified.
Fixed Asset	This list indicates if the item is a fixed asset (Y), a master fixed
	asset (M), or not a fixed asset (N).

Field	Description
	This box will automatically populate based upon the object code
	in the Chart of Accounts or the Commodity code.
Risk Claim	CMCSS does not use this field.
Notify Buyer	CMCSS does not use this field.

12. Enter the GL Allocations in the area at the bottom.

Seq	▼ Org	Obj	Project	Description	Amount	GL Bud
01	GIH35035	542900		INST MAT'LS OFFICE ED RHS	33.33	U

Field	<u>Steps</u>									
Org #	Click on the List Icon and select the Org code for the item being									
	requested. The Org code is an abbreviated number representing									
	Fund, Function, Location and Program elements of the account									
	number. Tab to the Obj field.									
Obj	Enter or select the appropriate object for the item being									
	requested from the List Icon. Tab to the Project Field.									
Project	Enter or select the appropriate Project for the item being									
	requested from the List Icon. Tab to the Description Field.									
Description	The Description field will be populated based on the Org, Obj and									
	Project elements entered by the requestor. Tab to the Amount									
	field.									
Amount	The Amount field will be populated based on the quantity and unit									
	price entered for the line item. Tab to the Budget Field.									
Budget	This is where the system will perform a budget check to ensure									
	sufficient funds are available for the items being requested. (See									
	screen shot above.)									

- 13. If there are not sufficient funds within the entered account, the requisition cannot be completed for further processing unless one of the following actions is taken:
 - a. Request a Budget Transfer from the Chief Financial Officer.
 - b. Request an override from Purchasing (in situations where CMCSS is awaiting a budget amendment).
 - c. Cancel the requisition.
- 14. If more lines need to be added to the requisition, click on the Line Detail button to continue adding items to the requisition, or click the COPY button and then UPDATE button to make changes. Click on the OK button to return to the Requisition Entry screen.
 - Enter a separate line for Freight. Do not use the Freight field in the line item or the header.
 If Freight is an estimate, put "Estimated Freight" as the line description.
- 15. Once the requisition has been completed and requires no changes, click the Release button to release the requisition. Once released, the requisition will automatically be sent through the MUNIS requisition approval workflow. Notice the requisition status is "6 Released".

16. Once released, you will not be able to make changes to the requisition unless it is rejected by someone in the approval workflow. Once rejected, you can then use the "Activate" button to update the requisition, whice Release p be release Activate

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Requisition Etti - Muris [CLARKSVILLE, VARTGOMERY CO. SCHOOL SYSTEM]															
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Dept/Loc	512	CH	HEF FINANCIAL OFF	FICER		Status	6 Released								
Fiscal year	2019	Ourrent	Next			Needed by									
Requisition number	Requisition number 1355 Entered 1009/2018 🛅 By linda.newlle														
General commodity						PO expiration									
General description	DATAPRO	DUCTS CALCU	JLATOR RIBBONS, I	R3197, BLACK/RED,		Receive by	Quantity O Amount								
General Notes															
Vendor Information	110751		O					Shipping Infor	mation						
vendor	118/51							Ship to	512						
PO mailing	0		MERCIAL, INC.				621 GRACEY AVE								
r o maning	500 STAPLES	DRIVE							0210101021744	LITUL					
									CLARKSVILLE		TN 37040				
								Email	LINDA NEVILLE	@CMCSS.NET					
	FARMINGTON		MA 017	702				Reference	LINDA NEVILLE						
Delivery method	Print	Fax	E-Mail												
Remit	1	STAPI	LES CONTRACT & C	COMMERCIA											
Vendor/Sourcing	g Notes	🖨 Vendor Quo	otes (0)												
Line Items															
Line Commodity	y Invitem	Inv item loc	Inv tran type	Description			Vendor		Qty	Unit Price	Freight	Disc %	Credit	Line Total 1st GL	Account
1				DATAPRODUCTS CALCUL	ATOR RIBBONS, R3	197, BLACK/RED,	(118751) STAPLES CONTR	ACT & COMMERC	6.00	2.61000	0.00	0.00	0.00	15.66 GSM0	0000 - 543500 -
2				STAPLES FILE FOLDER J	TANGULAR 36" X 48	FOR CATH	(118751) STAPLES CONTR (118751) STAPLES CONTR	ACT & COMMERC	2.00	35 25000	0.00	0.00	0.00	70.50 GSM0	0000 - 543500 -
4				STAPLES HB LEAD REFIL	LS, .7 MM, 90 PACK, 7	32834	(118751) STAPLES CONTR	ACT & COMMERC	2.00	1.67000	0.00	0.00	0.00	3.34 GSM0	0000 - 543500 -
5				PILOT G2 MECHANICAL P	ENCILS, #2 HB, 7 MN	I, DOZEN, F	(118751) STAPLES CONTR	ACT & COMMERC	1.00	11.86000	0.00	0.00	0.00	11.86 GSM0	0000 - 543500 -
•							m								
Total amount	108.40														
Workflow -															
My Approvals	Approve	Reject	t Forwa	ard Hold	Approvers										

- 17. If you need to see who is responsible for approving your requisition, click on the Approvers button at the bottom of the screen to see the workflow of your requisition. This screen will show what step is In Progress and who has the requisition in their approval queue.
- 18. Once the requisition has been through its approval workflow, it will advance to the Purchasing Director for approval and conversion to a Purchase Order. You will receive an email once the requisition has been converted to a Purchase Order indicating the Purchase Order number.