How to Enter a Requisition

Munis (v 10.5) Dashboard (v 6.1)

Procedure

1. From the left-hand menu, click on the Favorites arrow to view the Munis Menu.

![Figure 1 – Home screen of Munis](image)

2. Click Requisition Entry to open the program. Or search the Tyler Menu (located on the top right) in this directory Financials > Purchasing > Purchase Order Processing Menu > Requisition Entry.

   Note: Requisition Entry can also be found under Munis Departmental Functions within the Tyler Menu.

3. Click Add.

   On the Main tab, the requisition entry screen is divided into 2 sections: Header and Line Item Detail. The Header contains information such as the vendor, shipping address, etc. The Line Detail contains information about the specific item(s) you wish to purchase. The Line Detail at the bottom of this screen will automatically populate as the user adds items to the requisition.
4. Enter information on the Main tab:

- **Dept./Loc**: This will default to your department code. You may need to change this if you enter requisitions for multiple departments.

- **Requisition number**: Tab through so the system can auto-populate the field.

- **General commodity**: Click on the Ellipses (…) button next to the General commodity entry box to open the Commodity Help screen (Figure 3).
5. Find the Commodity by either scrolling through the list or using the Search/ Filter option at the bottom of the screen. Once you’ve found the Commodity, double click on it to return to the Requisition Entry screen where Munis has populated the General commodity with your selection.

6. Tab off the General commodity field. Munis will automatically populate the General description based on the Commodity you’ve selected (Figure 4).
How to Enter a Requisition

7. Fill in the following fields on the Requisition Entry screen:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Needed by</strong></td>
<td>Enter a date to alert the vendor if you would like the item(s) by a specific date.</td>
</tr>
<tr>
<td><strong>Entered</strong></td>
<td>Defaults to today’s date.</td>
</tr>
<tr>
<td><strong>General Notes</strong></td>
<td>If needed, enter by clicking on the button, typing a note and saving. If you want this to print on the PO, be sure to click “Print on PO” from the toolbar so that it checks this option box for you.</td>
</tr>
<tr>
<td><strong>Vendor</strong></td>
<td>If you know your vendor number you can type it in, otherwise click on the ellipses (…) next to the Vendor entry box to open the Vendor Help screen (Figure 5). Type in part of the vendor’s name in the “Vendor Name” field, and then click the Green Check to bring up the vendor search results (Figure 6). Helpful Hints - • Vendor names are case sensitive, so be sure to search only with all capital letters.</td>
</tr>
</tbody>
</table>
8. Click on the vendor that you want to use, making sure that the vendor's status is Active, and then click the Green Check button to select them.
How to Enter a Requisition

9. Tab off this field and Munis will automatically populate the vendor information section.

![Requisition Entry sample](image)

**Figure 7 – Requisition Entry sample**

10. If the address shown is incorrect, you will need to click the ellipses (…) button next to the PO mailing entry box and select the correct address where the PO should be mailed. A list of addresses for the vendor will display (Figure 8). Select the appropriate address and click the Accept button.

![Purchasing Address Help](image)

**Figure 8 – Purchasing Address Help**
How to Enter a Requisition

Finally, fill in the following fields on the Requisition Entry screen:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remit</td>
<td>Tab to the Remit field. Make sure that the address number in the PO mailing field and the Remit field match. If it is not correct, change it.</td>
</tr>
<tr>
<td>Ship to</td>
<td>The ship-to address may default from Department Code chosen. Tab through to the next field. If you need an item to be shipped to a location other than what defaults, you may change it.</td>
</tr>
<tr>
<td>Reference</td>
<td>Enter the name and complete telephone number of the person the vendor can contact regarding order specifics.</td>
</tr>
</tbody>
</table>

11. Tab off the Reference field will bring you to the Terms/Miscellaneous tab. Most departments don’t need to modify any of the fields on this page.

![Requisition Entry – Terms/Miscellaneous](image)

**Figure 9 – Requisition Entry – Terms/Miscellaneous**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discount %</td>
<td>Optional. Enter if receiving a percentage discount for the whole order.</td>
</tr>
<tr>
<td>Freight %</td>
<td>Optional. Enter the freight percentage for the whole order, if needed.</td>
</tr>
<tr>
<td>Freight methods/terms</td>
<td>Tells shipper if there are special shipping terms. Can change if needed. (Ex. Overnight mail, FedEx etc.)</td>
</tr>
<tr>
<td>Bill to</td>
<td>Will default from Department Code. Change the code if the invoice should be billed to a different address.</td>
</tr>
<tr>
<td>Bill to email</td>
<td>Insert a Bill To email address if desired</td>
</tr>
</tbody>
</table>
12. Press Enter on the keyboard or click the Accept button. This will bring you to Line Detail. Each Line Detail screen represents an item you would like to purchase. If there is more than one item, you will need to add multiple records of this screen. By default, you are brought to the first item you are requesting in Add mode.

![Line Detail](image)

**Figure 10 – Line Detail**

13. Enter information on the Line Detail screen:

<table>
<thead>
<tr>
<th>Qty</th>
<th>Defaults as 1, but can be changed to the number of units being requested.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commodity</td>
<td>Click on the Ellipses (…) button next to the Commodity entry box to open the Commodity Help screen (Figure 11).</td>
</tr>
</tbody>
</table>
14. The General commodity field will automatically be populated based on the commodity you chose on the previous screen. Click on the Green Check button to get to the Commodities selection screen (Figure 12).

15. Click on the Commodity with the Object & Sub-Object that you want to use, and then click the Green Check button to select it (Figure 12).
16. Tab to the next field, the Commodity and Description fields will automatically be populated based on your selection. You can keep this default description on the description field or you can modify it to add the description of the item(s) that you want to purchase using the quote presented to you by the vendor.

17. Provide the unit price. The total will multiply the Qty times this price. You do not need to update anything else in the Details or Miscellaneous sections.

18. Tab through the remaining options to open GL Account Allocations at the bottom of the screen.

19. Enter the GL expense account number to which the item will be charged. Type your account information in, making sure that you add a “.00” to the Org code, and match the object from the Commodity field (see Figure 14).
How to Enter a Requisition

20. If you would like to purchase more than one item with this requisition or use multiple accounts to pay for this purchase order, you will need to click the Add button to add another Line Detail record. Follow the same process as above for each new item you are requesting or new account you are using.

21. To return to the Requisition Header screen, select the Return button in the Munis Ribbon.

22. Once you have entered all of your requested items, click Release in the Menu of the Ribbon.

This starts the approval process for the requisition. Once you have released the requisition, you will be able to see it, but will not be able to make changes to it. If there is no approval process, you will be prompted that there are no workflow business rules. Click Yes to approve.
How to Enter a Requisition

Results

Status Change
With Workflow, a released requisition will have a status of 6 – Released. You can click on the Approvers button to see who needs to approve the requisition. Without Workflow, your requisition is now approved and will have a status of 8 - Approved

GL Impact
The GL account will now show the requisition amount (in the Requisitions field) which reduces the Available Budget amount.

Figure 15
You can then click on the yellow folder next to the Requisition Field to view the Requisitions which make up the dollar amount in the field.

What’s Next?
With Workflow: The released requisition is waiting for approval. Without Workflow: The approved requisition will be sent your buyer queue so they can review before converting this requisition into a purchase order.