#### Norfolk Public Schools Munis Dashboard Version 11.3 Created 02/14/2019 Last Updated 12/07/2020

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## **Dashboard Overview**

#### The Dashboard

Click the Munis Dashboard Icon







#### **Tyler Menu**



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#### Menu Options and Ribbon

The ribbon is your primary resource for performing actions within each program. In addition to the ribbon, there are menu and keyboard options available to help you use Munis programs efficiently.

The following table provides descriptions for the Munis ribbon groups and buttons. If a button is dimmed on a program screen, the selection is not available.

<b>1</b>	Vendors - Munis							
Accept Confirm	Image: Browse Carlow Control       Image: Control							
Button	Description							
Confirm	·							
Accept	Accept saves information after you have created or updated a record. This button is often highlighted when adding, updating, or searching for records.							
<b>O</b> Cancel	Cancel ends an operation, such as adding or updating a record.							
Search								
<b>Q</b> Search	Search finds records in a program. Search is often used to create an active set of records before proceeding to another step, such as printing a report, purging records, or posting invoices. In many cases, you can use wildcard characters to further define a search.							
Browse	Browse is available when an active set of records exists, or after an active set is created using the Search or Define buttons. The browse screen displays a list of all the records in the active set. You can sort, view, or export data from the browse screen. On a browse screen, the Excel button exports the data directly to a Microsoft <sup>®</sup> Excel spreadsheet.							
(CP) Advanced	Advanced provides advanced searching options. Click the down arrow to access the advanced options available in the active program.							
Query Builder	Query creates a query based on an expression or mathematical equation. This option assists in finding records that meet very specific criteria, but that cannot be defined by entering data directly into a field. When you click Query, the Query Wizard screen (similar to the expression builders found in Microsoft Excel or Microsoft Access) provides options for creating an expression based on the fields in the active program							
Actions								
Update	Update adds data or changes existing data in a record. You can change data in any active field. Fields that are not active typically are part of the record key. The key is the field or combination of fields that uniquely identifies the record from all other records. If you need to change data in a key field, you must delete the record and enter it again.							
X Delete	Delete removes the record currently displayed from the program. If the record is being used by another process, you cannot delete it. Once you delete a record, you cannot recover it.							

Global	Global provides the option for updating or deleting multiple records at one time. Click the down arrow to access the global options available in the active program.
Duplicate	Duplicate creates a copy of data and creates a new record in the same program using the original data as a base. Once you duplicate data, you can modify the new record.
Output	
<b>P</b> rint	Print sends a report directly to your default printer. Click the down arrow to display output options. In many instances, Output Options opens the Output dialog box, which provides you with multiple print settings and options. If a program has specific output sort options or types, the program provides the appropriate options box when you click Output Options.
Text File	Text File saves a report to a file in the Munis spool directory. After saving, you can display or print the report from the Saved Reports program. The Saved Reports program is available on the Departmental Functions menu. To use the spool function from the File menu in a specific program, click Output and then select File under Output Type.
PDF	PDF creates the report in PDF format. The program opens the document in the installed PDF reader. Note: The PDF button is only accessible if the Output to PDF permission is granted in Munis System Roles for at least one role assigned to your user ID.
Preview	Preview immediately displays a report on the screen. For this option, the program provides the report in HTML format with no page breaks.
Office	
<b>Excel</b>	Excel exports the active set of records to a Microsoft Excel spreadsheet. If you click Excel from a browse screen, the program immediately exports the data and opens the Microsoft Excel application. If you click Excel from a master program or subprogram screen, the program displays the Export Filter screen. Use this screen to specify the data field values to export to Microsoft Excel. When you click Save and Exit, the program opens Microsoft Excel with the selected data in the active worksheet. In each case, the program inserts hyperlinks to the individual Munis records. The file created during export is automatically saved to your Munis directory; use the Save As feature in Excel to save the file to a new location.
Word	Word creates an active set of records to export into Microsoft Word. It is especially useful for spooled reports. This option enables you to format the report in Microsoft Word prior to printing.
<b>Email</b>	Email creates an email message that contains a hyperlink to the active record. When the email recipient clicks the hyperlink, Tyler Dashboard opens, and in turn opens the Munis program with the linked record as the current record. Note: This feature requires that the Tyler Dashboard be enabled.
Schedule	Schedule displays the Appointments screen, which schedules meetings that are associated with the active record. When you click Add on the Appointments screen, the program creates an email message containing meeting start and end times, and a meeting description. You can define the meeting times and modify the description, as appropriate. When the email recipient accepts the meeting, it is automatically added to his or her Exchange calendar.

Tools	
<b>U</b> Attach	Attach allows you to view, add, or delete documentation related to the current record. If your organization uses Tyler Content Manager (TCM), the Attachments option displays a Document Mappings dialog box. When you select an available mapping, the program opens TCM. If your organization does not use Tyler Content Manager, the Attach option provides a Munis Attachments screen, where you can add or access documentation from your Munis server. If you change the original document, the attachment is not automatically updated. To keep attachments current, you must update the original documents and manually attach the updated files. Note: This option is available only if the View Attachments and Associated Documents check box is selected in the Roles – Munis System program. If this check box is not selected, the Attachments button is not accessible.
Notes	Notes provides the option for adding or updating notes for the selected record. Click the down arrow to select the applicable notes option and add or update a note using the Text Editor program.
Notify	Notify provides integration with the Tyler Notify program, which provides options for contacting Munis customers by telephone or email using predefined content. Note: This feature is only available if your organization has implemented Tyler Notify.
Audit	Audit provides the audit history for the selected record.
MapLink	MapLink provides integration of map data sources with Munis programs. The MapLink application is not launched as an interactive application; however, you are able to view a data set in Munis that has been modified during a MapLink session. Click the down arrow for MapLink options.
Alerts	Alerts allows you to add or view all reminder alerts or reminder alerts for the current record. Reminder alerts distribute emails at specified dates as a reminder of upcoming events or activities that require attention. Reminder alerts are established using the Alert Administration programs on the System Administration menu. The Alert programs are not available for use with all Munis programs. Click the down arrow to manage alerts.
<b>ГСМ</b>	Laserfiche users only TCM opens the Laserfiche <sup>®</sup> content management system.
Menu	
More	The Menu group provides options specific to managing data in the active program and options for accessing related programs. The options in this group vary by program; for programs with multiple options, click the More arrow to view the complete list.
Return	
Return	Return closes the current screen and returns you to the previous screen of the active program.
Keyboard s	hortcuts available within Munis programs include the following:

- Press Enter to save information after you have created or updated a record.
- Press Tab to move forward to the next available field; press Shift+Tab to move back to a previous field.

- Press Spacebar to clear or select check boxes.
- Press Spacebar to view options in a list. Use the Up and Down arrows to move through the options; press Enter to select an option.
- Press Ctrl+[arrow] to move through the records in an active set:
- Press Ctrl+Down Arrow to the move to the next record.
- Press Ctrl+Up Arrow to move to the previous record.
- Press Ctrl+Right Arrow to move to the last record in the active set
- Press Ctrl+Left Arrow to move to the first record in the active set.

## **Vendor Overview**

#### **Vendor Inquiry Program**

#### Tyler Menu $\rightarrow$ Departmental Functions $\rightarrow$ Vendor Inquiry

Note: Vendor Inquiry can also be found on the dashboard. When you want to know if a Vendor is in the system you can go to Vendor inquiry & do a search. The most common way to search is to use the Company Name box.

When you want to know if a Vendor is in the system you can go to Vendor inquiry and do a search. One way to search is to use the Alpha box, another is to use the Company Name box and another is to look by Tax Id or Social Security Number.

#### Searching using the Alpha Box or Company Name box

- 1. Open the Vendor Inquiry Program
- 2. Click Search
- 3. Click in the Alpha box
- 4. In this box you can search for a last name or a company name. I entered \*SMITH\* in the Company Name box. Using \* both before AND after partial name entry will result in maximum results.
- 5. Click Accept
- 6. At the Bottom you can see there are 21 results.



- 7. You can look at each record by clicking the arrows.
- 8. You can also click Browse at the top of the screen.



9. Browse will open a spreadsheet of the results.

Accept	Cancel	Q Search	Browse Query Builder	Add Up	date X Delete	Print Dutput	Exce	Word Email Schedule Office	Attach	Notes	Audit H Maplink*	Show/Hide Cols Customize Screen Form Menu	Return
		Vendor	Alpha Sort Nam	10	Company Name	•		Status		Doing Bu	siness As		
		11378	SMITH EMERY		SMITH EMERY			Active					
			SMITH FAMILY	FARMS	SMITH FAMILY	SMITH FAMILY FARMS		Active					
		12941	SMITH, MARGA	RET	MARGARET SM	MARGARET SMITH			Active				
		13031	SMITH, HATTIE		HATTIE SMITH			Active					
		13034	SMITH, ROBER	TH	ROBERT H SM	TH		Active					
		13440	SMITH, LAWRE	NCE	LAWRENCE SM	ATH		Active					
		13514	SMITH JR, JOH	IN C	JOHN C SMITH	JR		Active Active					
		13933	SMITH, SCOTT	IE	SCOTTIE SMIT	н							
		14376	SMITH, TRESA		TRESA SMITH			Active					
		14494	SMITH'S GOPH	ER TRAPP	SMITH'S GOPH	ER TRAPPING		Active					
		14859	SMITH, MARIA	E	MARIA E SMITH	4		Active					

NOTE: January 30, 2020: Effective immediately – any requests for Munis Maintenance around Vendor Setup/changes, or New/Change Remit To's are to include supporting requested information (email from the requestor, w9, etc. to include the vendors type of goods/services provided and/or who and why the request is being made, if the 'Remit To' is appropriate for setup, or HOW the 'IRS Section' of the vendor maintenance record is to be setup.

Due to numerous IRS changes around the annual 1099 required reporting, we want to ensure that setups are approved and/or correctly reporting from regulation and control perspectives that result from how Purchasing is setting up vendors and/or remit-to's.

### When requesting setting up a new vendor the end user/department will forward the following required information to dps@nps.k12.va.us:

- 1. Fully completed and clearly legible W9 with vendors *handwritten* signature
- 2. Signature of approval from department head/principal
- 3. Vendor contact information
  - a. Name
  - b. Telephone
  - c. Fax
  - d. Payment/Remit if different from W9

## This will help comply with internal controls best practice known as segregation of duties. Further questions should be directed to Ray Reyes.

#### **Contact Information**

- 1. On the Main tab (Above) you can see the address, email and web site address for the selected vendor.
- 2. On the Contacts tab you can find phone contact information.

General	Vendor Info	rmation						
Vendor	10015	+1	Entity	1				
Alpha	ACOE		Туре	CONS - CONS	SULTANTS		7	
Status	ACTIVE	$\nabla$	Reason		$\nabla$			
Main	General	Miscellaneous	Contacts	Certifications	Insurances	Withhold	ling	
Main Type	General	Miscellaneous Name	Contacts	Certifications Description	Insurances	Withhold	ling elephone	Fax
Main Type GENE	General	Miscellaneous Name Contact 1	Contacts	Certifications Description	Insurances	Withhold	ling elephone 10-670-4170	Fax 510-670-7771

# Requisitions

#### **Entering a New Requisition**

1. Go to Requisition Entry - Tyler Menu  $\rightarrow$  Financials  $\rightarrow$  Purchasing  $\rightarrow$  Purchase Order Processing  $\rightarrow$  Requisition

Entry	
HOME Requisition Entry - Mur	iis [Train Database Feb 3 2019] a 🖉 ? 🗙
Accept Cancel Search State Cancel State C	d II Attach Notify  Attach Notify  Replace  Attach Notify  Att
Main Terms/Miscellaneous	10012 Mielin
Main Information	
Dept/Loc	Status
Fiscal year Current Next	Needed by
Requisition number	Entered 🛅 By
General commodity	Convert to
General description	PO expiration
General Notes	Receive by Quantity Amount
	Inree way match required
Vendor Vendor	Ship to
Name	
PO mailing	
	Email
	Deference
Delivery method	Neleience
Remit	
🛱 Vendor/Sourcing Notes 🕞 Vendor Quotes (0)	
Line Commodity Invitem Invitem Invitem Ioc Invitem Ioc	intion Vender
Line Commonly invitent invitentioc invitantype besch	iption vendor
4	• • • • • • • • • • • • • • • • • • •
Total amount	
4	- F

K < 0 of 0 > >

You can also: Click in the search bar: Type Requisition Entry and tap the search icon Note: Requisition Entry can also be found on your dashboard.

- 2. Click Add
- 3. Your Site/Department number will show in the Dept/Loc box
- 4. Press Tab
- 5. The Fiscal year will complete for you
- 6. Tab past the Requisition number box; a requisition number will auto populate.
- 7. In the General Description box enter a definition of the type of order you are creating, such as TEXTBOOKS, CLASSROOM SUPPLIES, ETC. (REMEMBER ALWAYS USE CAP LOCK IN MUNIS).

Note			
Requisition	2017	17000275	
Date/Time	2016-08-29	20:33	Print on PO.
Created By	4180mkitch	en	
SPSA: LITER	RACY PAGE	4	
			$\sim$

8. Just below the General Description box is General Notes. This is where you can enter a note such as your school site plan justification for categorical programs. Click Accept and then click return.

9. Notice that the Status box is Status 2 CREATED

#### 10. Tab past:

- a. Needed by box and the Entered box that have auto filled
- b. PO expiration box leaving it empty.
- c. Receive by bullet leaving it on Quantity
- d. Three way match checked
- e. Project accounts, and Inspection Required leaving the boxes unchecked.

11. You are now ready to complete the bottom half of the main page: Vendor and Shipping and Billing

Accept Cancel Confirm	Browse Query Builder Search Actions Coloration Search Coloration S	le XII Word Excel B Chedu Office	e Notes (addit Notify (Construction) Attach Notify (Construction) Attach (Construction)		
Main Dept/Loc Fiscal year Requisition number General description	104      BAYVIEW ELEMENTARY       2017     Current @ Next       17000275       CLASSROOM SUPPLIES	Status Needed by Entered PO expiration Receive by	Created  G029/2016  By 4180mkitchen  Cuantity  Three way match required  Inspecton required  Sy		
Vendor Vendor Name PO mailing Delivery method	Committed		Project accounts appaeo	Shipping and Billing Ship to Address	862 STORES WAREHOU WEST CONTRA COS 810 OHIO AVENUE
Remit Address	ran rax c-man			Email Reference	RICHMOND
				Freight Meth/Terms Special handling	N - NONE

12. Vendor – enter the corresponding vendor number found from within vendor inquiry (see previous section) and hit tab. Do not search using the option within requisition entry. This will not return all available active options.

13. Tab past:

- a. Delivery method boxes and the Remit box.
- b. The Shipping Address defaults to your location. You have the option of changing the shipping destination to your site for requisitions where you are ordering Books, Field Trips, Travel, Contracts, Amazon, and Blanket Orders. Type your site number in the ship to box and hit tab.
- 14. Email enter the district contact email for this order in this space

15. Reference – Use this field to enter information you may need to know such as the Teacher's name and room number.

- 16. Tab Past:
  - a. Special handling & Terms section
  - b. Discount % & Freight %
  - c. Sales tax group & Sales tax %
  - d. Use tax group and Use tax %
  - e. Miscellaneous section
  - f. Type box In the drop down leave on N-Normal
  - g. Notify Originator when converted to PO/Contract checkbox This box is checked by default.
- 17. Click Accept, you will be transferred to the Line Items screen.
- 18. You are now ready to enter your items on the Line Items page.
- 19. In the Quantity box enter the quantity for the first item.

20. In the Description box enter the item number then a description. Be sure to include any other necessary details such as color and size. Remember to use CAPS.

- 21. Tab to the Unit Price box Enter the price
- 22. Tab to UOM Click on the ellipses to select the Unit of Measure such as EA, DOZ, GAL, LOT, SET, etc.
- 23. Tab through all the fields until you reach the Account section

24. Enter as much information as you can. In the following example I entered the Fund, Resource, Object and Site.

Accept Cancel Se	arch Browse Search	Add Update C Global- Duplicate Actions	Print	PDF PDF Preview Dutput	Excel Word B Email Schedule Office	Attach	Notes	Audit Maplink*	Copy GL Acct	Return
Requisition Fiscal year 2017	Number	17000275	Line	1						
Detail										
Quantity	1.00				Unit Price			126.00000		
					UOM	EA	4			
Description	123456 CLASSROOM AE	SC RUG, BLUE 12 X 16		~						
				V	GROSS			126	00	
	Add'l Desc/Notes				Freight				00	
					Discount		5.00	%		
					Taxable			126.00		
					Sales tax			11.	97 Modify ta	x groups
					Credit				00	
					TOTAL			131	67	
					Amount justification:		UN	KNOWN		
Seq T	Account				Description				Amo	unt GL Bud
01 Exp V	01-0000-4300-104-								131	.67

25. Click the ellipsis

Accept Cancel	Q Browse Search Query Builder	Add Update Colobal*	Print DF Preview	X Excel	Word Email Schedule	Attach	Notes	Audit Haplink*	Show/Hide Cols Customize Screen Form	Return
Confirm	Search	Actions	Output		Office		Tools		Menu	
Account			Description							
01-0000-4300-1	104-1140-2700-200120-0-0	000-	LRG ELEM ADMIN	BAYVIE	N					
01-0000-4300-1	104-1140-1000-200120-0-0	000-	LRG ELEM INSTR BAYVIEW							
01-0000-4300-1	104-1110-2700-200110-0-0	000-	UNR ADMIN BAYVIEW							
01-0000-4300-1	104-1110-1000-200110-0-0	0000-	UNR INSTR BAYVIEW							
01-0000-4300-1	104-0000-8260-400110-0-0	0000	UNR CUSTOD BAYVIEW							
01-0000-4300-104-0001-1000-200120-0-0000			UNR TRANS K BAYVIEW							
01-0000-4300-1	UNR INSTR BAYVIEW									
01-0000-4300-1	104-1110-2700-200120-0-0	0000	UNR ADMIN BAYVI	EW						

26. A new window will appear with the account numbers you can choose from, select one.

27. Click Accept – You will be returned to the Line Item page with the account code filled in.

28. Tab once - At the bottom of the screen you will see your remaining balance for that account.

Accept Cancel Se Confirm	arch Browse	Add Update Global- Buplicate Actions	Print Text file	Excel Word Excel Schedule Office	U ach Notes   Audit  Maplink-  Alerts-  Tools  Audit  Ref	Jum
Fiscal year 2017	Number	17000275	Line 1			
Detail						
Quantity	1.00			Unit Price UOM	126.00000 EA	
Description	123456 CLASSROOM	ABC RUG, BLUE 12 X 16	0	GROSS Freight Discount Taxable Sales tax Credit TOTAL Amount justification:	126.00 .00 5.00 % 126.00 (sc 11.97 .00 131.67 UNKNOWN	Modify lax groups
Seq T	Account			Description		Amount GL Bud
01 Expens	01-0000-4300-104-	1110-1000-200110-0-0000	-	UNR INSTR BAYVIE	SW	131.67 ×

29. Click Accept

30. If you have more items to enter, click Add (plus) at the top of the screen, to create line 2 and follow steps 25 through 35 in the above procedures to enter additional line items.

31. When your curser is in the Account section you can click Copy GL in the ribbon to populate the same account code you used on your previous line.

32. After entering your last line item click Accept, then click Return to go back to the main page of the requisition.

33. Attach the associate quote using the Attachments icon (Paperclip).

\$	НОМ	-											Requ	uisition Entry	- Munis [WEST	CONTR
Accept	Cancel	Search	Browse	Add	Update Activ	C Global-	Print	Text file	X II Excel	Word Email Schedu	Attach	Notes Notify	Audit Maplink*	Switch Form Line Items Release	Activate Mass Allocate	Return

34. Click Choose File to find your saved file, click to highlight then click Open

🖉 🖉 🗖 Desktop 🔹			+ + <sub>2</sub>	Search Desktop			2
Organize • New folder				. jii	•		0
Favorites	-	Name	*	Size		Re	em
E Desktop		17000644 Deposit Invoice			1,041 K	B Ad	dob
Downloads		17000644 Full Invoice			1,072 K	B Ad	dob
	10	17000644 Picture			538 K	B Ad	dob
Libraries		17000702			163 K	B A	dob
Documents		17000825 Invoice			20 K	B A	dob
J Music		74 17000825			87 K	E A	dob
Pictures		17000986-invoice			64 K	B Ad	dob
Videos		17001147-quote			103 K	B Ad	dob
		17001147-quote			64 K	8 M	licre
E Computer		17001151			825 K	8 A.	dob
AL OSDisk (C:)	-	•					
File name:	1700	0825	- 1	All Files (*.*)			-

- 35. Name your file and Click Return
- 36. When you are ready to send your requisition into workflow your status will be 4 Allocated.
- 37. Click Release in the ribbon.

Accept Cancel	Q III Browse Search Query Builder	Add Upda	Ate Delete	Print	Text file	X Excel	Word Email Schedule	0 Attach	Notes	Audit Maplink*	Switch Form Line Items Release	Activate Mass Allocate	Return
Confirm	Search	1	Actions		Output		Office		Tools		N	lenu	
Main													
Dept/Loc	104	BAY	VIEW ELEMENT.	ARY		Status		4 Allo	cated				
Finantwoor	2047	Qame	Quant			Noodod	bu		1000	1			

38. When you click release you will get this pop-up



#### 39. Click Continue

40. Your status will now be 6 (Released).

Accept Cancel	Q Search	Browse Query Builder Search	Add	Update Actio	Delete	Print	Text file PDF Preview Output	Excel	Word Email Schedule Office	U Attach	Notes	Audit Maplink*	Switch Form Line Items Release	Activate Mass Allocate More • Ienu	Return
Main															
Dept/Loc		104 .		BAYVI	EW ELEMENT/	ARY		Status	- <b>(</b> )	6 Rel	eased				
Fiscal year		2017	OCU	rrent 🔘	Next			Needed	by						
Requisition nur	nber	1	700027	5				Entered	1	08/29/20	16	By 4180mk	itchen		

#### **Approval Status**

- 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.
- Created: The requisition header (general) details have been entered, but general ledger (GL) details have not been entered, or, the requisition has header and GL detail, but does not have the appropriate budget to move it to a Status 4. In this case, a budget transfer must be made and posted, after which, you can click the Allocate option to move the requisition to a status 4–Allocated.

- Allocated: The requisition has been entered and has been allocated (charged) to a general ledger account, therefore money is being taken from available budget. The requisition has not been released into Workflow. A requisition must be in a status 4–Allocated to be released into Workflow; click Release to initiate the Workflow process.
- Released: The requisition has been released into Workflow and is awaiting approval. Click the Approvers button to see the current approval status.
- Approved: The requisition has been fully approved in Workflow and is ready to be converted to a purchase order.
- Converted: The requisition has been converted to a purchase order. The number is included on the Terms/Miscellaneous tab in Requisition Entry.

41. Status Change - With Workflow in place, a released requisition has a status of 6–Released. To see the approval process at any point, click the Approvers button on the Workflow group of the Requisition Entry screen. Requisitions must be successfully approved by all approvers prior to being converted to into a purchase order. Once a requisition is approved, it is eligible to be converted into a purchase order. When your requisition has been converted to a purchase order, you receive a confirming e-mail.

WORKTIOW					
My Approvals	Approve	Reject	Forward	Hold	Approvers

#### Searching in Requisition Entry

Menu  $\rightarrow$  Financials  $\rightarrow$  Purchasing  $\rightarrow$  Purchase Order Processing  $\rightarrow$  Requisition Entry

Note: Requisition Entry can also be found on the Munis Departmental Functions menu and on your dashboard. You are able to search using many different options. Below are a few ideas.

#### Search by Site

- 1. Open Requisition Entry
- 2. Click Search



#### 3. Enter your site number in the Dept/Loc box.

Main		
Dept/Loc	360	
Fiscal year	2017	c
Requisition number		
General description		
😅 General Notes		

- 4. Enter the current year in the Fiscal year box.
- Note: You can also search for all of a year's orders by entering 20xx in the Fiscal year box.
- 5. Click Accept
- 6. The search results will be displayed.

HOME	1	aquisision Entry - Munis (WEST CONTRA COSTA TEST)
Active Search Search Search Search Course Search Course Search Course Search Course Search Course Active Active Actives Course Course	Be Dia Grani Contral Office Office Contral Con	schule Ass Alocate More *
Deplition XEINEDV HIGH Fired Year 2017 CO Current ® Hood Requisition number Timody WinAteHOUSE General Notes	Status 6 Released Needed by 69/42016 0y 41805pres PO expandion Receive by 60/42016 0y 41805pres PO expandion Receive by 60 careful or copied Impection required Impection required Project account applied	
Vendor Name PO maling Delevery method Remat Address		Street on with Ridge       Ship to       Ship to       Address       REDARDOV HIGH       Address       RECHARDNED       CA       Ship to       Reference       Freqiti Meth/Terms       Special handling       N - NONE
Convest Descent % 000 Frequit % 000 Im Sector & Sales tax % 10.000 Im Use tax group Use tax % 000 Imi		Minos Annoon Buyre Review Type N. HODBAL PO V. Holfly originator when converted to PO/Contract. Notify originator of overages.
Line Decorption Vendor 1 ENVELOPES, WHT, LEGAL, RET ADD #10 500/BOX 2 TISSUES WIPHUS FACIAL, KLEENEX 100 CR 125/RCZ 2PLY C S S S S S S S S S S S S S S S S S S S	ļ:	Ony         Unit Price         UOM         Freight         Disc %         Credit         Line Total Justification           1 60         13.64300         EX         0.00         0.00         0.00         13.64           50 00         01000         EX         0.00         0.00         0.00         13.64           50 00         01000         EX         0.00         0.00         5.0         Not Needed
Lo Accourts 1648 Amount 14,34 Work.com Mr. Anocousts Anocime Descrit Forward	Hold Approvers	Convert

- 7. At the bottom of the screen you can see how many requisitions have been done for your site.
- 8. If you want see your results displayed in list form click Browse.



9. This list can be sorted by clicking on the headers.

10. While you are in Browse you can export to Excel by clicking the Excel Icon.

-									Requ	isition Entry -	Munis [WEST CONTRA	COSTA TEST] > Re	quicition Maintenance	
Accept Cancel	Q	Query Builder	Add Update	X Delete Global+	Print Previ	File X II Excel	Word Email Schedule	() Attach	Notes Notify	Fi Aurlit	Show/Hide Cols Customize Screen Form	Return		
Confirm		Search	Action	15	Output		Office		Tools		Menu			
Reco	ď	Year	A Requisition	Entry Date	Descripti	on .				Amou	nt Purchase Orde	r Status	Vendor Name	Department
	3 1	2017	17000278	09/14/2016	AMAZON	ORDER				62.3	8 20170116	Converted	AMAZON COM	360
	2	2017	17000282	09/14/2016	BLANKE	PURCHAS	SE ORDER			1,000.0	0 20170119	Converted	SOUTHWEST	360
	1	2017	17000283	09/14/2016	WAREHO	USE				14.3	4 (	Released		360

11. When you click on Excel you will get this pop-up, select Open

Do you want to open or save munistemp16101219550814522090033592.xlsx (4.42 KB) from yvwtnmun112ci02.tylertech.com?				×	С
	Open	Save	•	Cancel	

- 12. The Excel Spreadsheet will open.
- 13. Click on Enable Editing so that you can work in the document.

C	Protected	Viev	v This file	e originated from	an Internet locat	ion and might be unsafe. Click for more details.	Enable E	diting			
	A1		• (	f_x	Record						
1	A		В	С	D	E	F	G	Н	L.	J
1	Record		Year	Requisition	Entry Date	Description	Amount	Purchase Order	Status	Vendor Name	Department
2	11111	3	2017	1700027	8 09/14/2016	AMAZON ORDER	62.38	20170116	Converted	AMAZON.COM	360
3		2	2017	1700028	2 09/14/2016	BLANKET PURCHASE ORDER	1,000.00	20170119	Converted	SOUTHWEST	360
4		1	2017	1700028	3 09/14/2016	WAREHOUSE	14.34	0	Released		360
5											
6											
7											

14. To return to Munis you can save or close the Excel spreadsheet.

15. When you return to Munis you will see the Requisition Maintenance screen.

16. You can close the Requisition Maintenance screen by clicking Return

This technique can also be used to Search by Your Name & Search by Vendor

#### Search Requisition Number

- 1. Open Requisition Entry
- 2. Click Search



- 3. Enter the Requisition number in the Requisition Number box.
- 4. Click Accept
- 5. The requisition you searched for will display.

## **Approve a Requisition**

Open the Tyler Menu - Each user's Tyler Menu will have different menu options. Users can save "Quick Links" onto Dashboard.

#### **Requisition Approvals**

Financials > Purchasing > Purchase Order Processing Menu > Requisition Approvals



1. Click Select on the Munis Ribbon. This will allow you to choose and view all requisitions in your queue for approval.

$\sim$	НОМ	E											Requisiti	on Appi	rovals	- Munis [Nor	folk Public S	chools]	
Accept	Cancel	Q Search	Browse Query Builder	Add	Update	X Delete ⓒ Global→ Duplicate			X Excel	Will Wo	ord nail hedule	U Attach	Notes Notify	🖹 Auc Ha 🚹 Ale	dit plink≁ rts∙	Select Sort Approved the	Approval C Process records in wh	omments	(S) (Alt-1)
Con	firm		Search	Actic	ons		Output		Office			Tools				Menu			
Code	Year	Year Req # Process Entered by D				Description	Description Amour							Vendor	Vendo	or Name		Requisition .	Buyer ID
	2019	Year         Req #         Process         Entered by         December 2019           2019         21901537         REQ         afitzgerald         C				CONSULTIN	CONSULTING SERVICES							16570	ERIC	FLOYD		01/16/2019	dhenley
	2019	21901607	7 REQ	afitzgera	ald	EDUCATION	IAL SE	RVICES			360	.00		16662 TERESA CLAY				01/24/2019	dhenley
	2019	21901647	7 REQ	ifebrer		COMPUTER	ACCE	SSORIES AI	ND SUPP	PLIES	158	00		1109	APPL	E INC		01/31/2019	msinnott
	2019	21901726	6 REQ	cwilliam	s7	COMPUTER	ACCE	SSORIES AI	ND SUPP	PLIES	2,400	.00		6753	BARC	ON COMMUNI	CATIONS	02/07/2019	msinnott
	2019	21901735	5 REQ	bouthar	t	PUBLIC WO	RKS A	ND RELATE	O SERVI	CES	722	22		1275	DOM	INION ENERG	Y VIRGINIA	02/08/2019	fledbetter
	2019 21901741 REQ afitzgerald EDUCATIO					EDUCATION	ICATIONAL SERVICES 550.00				0.00 16955 KAR			KARA DUMONT		02/11/2019	dhenley		
	2019	21901750	) REQ	afitzgera	ald	CONSULTIN	G SER	VICES			45	00		16956	SUZE	TTE M MART	INEZ	02/11/2019	dhenley

2. To view the details of each requisition in your queue, highlight the requisition you would like to view and click view requisitions on the Munis Ribbon. This will allow you to look at all information on the requisition including the attachments. You can use the arrows at the bottom of the screen to click between Tabs of the requisition and all requisitions in your queue.

<b>%</b>	НОМ	E											Requis	ition App	rovals	- 1	Munis	Norfol	k Public S	ichools]		
Accept	Confirm Search Search Actions Confirm							X Excel	Word Word Email Schell Schell	d il A sdule	0 ttach	Note Notif	ts 🗎 Au fy 🔝 Ma D Ale	dit plink* erts*	v	iew Rei	quisition ew all o	Daturn the requi	sitions in the curr	ent list in Requisition Entry. (Ct	rl+S) (Alt-1)	
Con	Confirm Search Actions (						Output	lutput Office Tools								M	enu					
Code	Year	Req	# Process	Entered by		Description					Amoun	t Cor	mment	Vendor	Vend	or I	Name			Requisition	Buyer ID	
$\nabla$	2019	2190153	7 REQ	afitzgerald		CONSULTIN	G SER	VICES			617.40			16570	ERIC	FL	OYD			01/16/2019	dhenley	
	2019	2190160	7 REQ	afitzgerald		EDUCATION	AL SE	RVICES			360.00	)		16662	16662 TERESA CLAY				01/24/2019	dhenley		
	2019	2190164	7 REQ	ifebrer		COMPUTER	ACCE	SSORIES AN	D SUPP	PL	158.00	)		1109	APPI	LEI	INC			01/31/2019	msinnott	
	2019	2190172	6 REQ	cwilliams7		COMPUTER ACCESSORIES AND SUPPL			PL 1	2,400.00	)		6753	BAR	ON	COM	NUNICA	TIONS	02/07/2019	msinnott		
	2019	2190173	5 REQ	bouthart		PUBLIC WORKS AND RELATED SERVI				722.22			1275	DON	IINI		IERGY	VIRGINIA	02/08/2019	fledbetter		
	2019	2190174	1 REQ	afitzgerald		EDUCATIONAL SERVICES					550.00		16955 KARA DUMONT		02/11/2019	dhenley						
$\square$	2019	2190175	0 REQ	afitzgerald		CONSULTING SERVICES					45.00	)	16956 SUZETTE M MARTINEZ			Z	02/11/2019	dhenley				

3. Review to make sure all information is correct. If the department is procuring through a Contract, make sure that there is a contract number keyed in the appropriate space under the Terms/Miscellaneous Tab.

К	Requisition Entry - Munis [	nis [Train Database Feb 10 2019] 🔊	0
Accept Cancel         Second	Notes Radit Swit	Selton Form Activate Unit Inters Water Activate More	
Main Terms/Miscellaneous	The state interest of the carter	and the record ()	
Main Information			
DeptiLoc 159 SUBURBAN PARK ELEMENTARY	Status 8	8 Approved	
Fiscal year 2019 Current Next	Needed by		
Requisition number 21901537	Entered 01/18	Junezana Cada	
General commonly 918 CONSULTING SERVICES	Convertion Para	For the second sec	
12 General Notes	Receive by	Ouantity     Amount	
	V 1	Three way match required	
		Inspection required By	
Vender Information		Shipping Information	
Vendor 16570 😰 Committed		Ship to 159	
Name ERIC FLOYD		SUBURBAN PARK ELEMENTARY SCH	
PO mailing 0		310 THOLE STREET	
233 W 26TH STREET			
		NORFOLK VA 23505	
		Email	
NOTO14 NO. 20017		Reference ANCELA EITZGERALD	
Delivery method C Brief Env E Mail			
Remit 0 02			
Provide the second seco			
Line Commodity Invitem Invitem for Invitem for		Memory Ob	Init Price
1 COUNSELING AN	D BEHAVIOR MANAGEMENT S	INT SERVICES ON 1 (16570) ERIC FLOYD 41.16	15.00000
4			
Total amount 617.40			
Workflow			
My Approvals Approve Reject Forward Hold Approve	18		
K < 1 of 1 >> Record(s) updated.			

4. If everything is correct hit approve. If not, place the requisition on hold until information is obtained, or reject to send it back to the originator. Completed this for each requisition needing approval.

Vendor/S	ourcing Notes	🖨 Vendor (	Quotes (0)		
Line Items					
Line Cor	nmodity	Inv item	Inv iter	n loc Inv tran type	Description
1					COUNSELING AND BE
4					
Total amount	617.40				
Total amount	017.40				
Workflow					
My Approva	ls Approv	e R	eject Forv	vard Hold	Approvers
4.4	1 of 7	<u> </u>			
IN N	1017	11			

5. When review of the requisition is complete, Click return on the Munis Ribbon. Then hit OK to accept the Munis Text box.



#### Searching in Purchase Order Inquiry

Menu  $\rightarrow$  Financials  $\rightarrow$  Purchasing  $\rightarrow$  Purchase Order Processing  $\rightarrow$  Purchase Order Inquiry Note: Purchase Order Inquiry can also be found on the Munis Departmental Functions menu and on your dashboard.

You are able to search using many different options. Below are a few ideas.

#### Search by Site

- 1. Open Purchase Order Inquiry
- 2. Click Search

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3. The PO Inquiry Find screen will open.



- 4. Enter your site number in the Dept/Loc box.
- 5. Enter the current year in the Fiscal year box.
- 6. Click Accept

Certim Saven Actions Output Office Tools	Menu
table and the second s	Statu (2 - Perme) * Convel P1950205 Navado (9 - P1950205 Late Changet 8 8
Web         Controller           VDRIDL         Controller           VDRIDL         VDRIDL           VDRIDL         VDRIDL           VDRIDL         VDRIDL           VDRIDL         VDRIDL	May Ide         XXXX           HOLL AND CLASSING MARY           HOLL AND CLASSING MARY
United         Balance / MER (3.000ml)           1         3.224.6         0.00         1.224.6         0.000-556-60000-566-6000-566-6000-566-6000-566-6000-560-6000-560-6000-560-6000-560-6000-566-6000-566-6000-560-600-560-600-560-600-560-600-560-600-560-600-560-500-50	Odred 3204 Lasted 8 Baters 3224 9

Note: You can also search for all of last year's orders by entering 2015 in the Fiscal year box.

- 7. The search results will be displayed.
- 8. At the bottom of the screen you can see how many Purchase Orders have been done for your site.
- 9. You can also see the Totals for each Purchase Order.
- 10. Click the arrows to scroll through your results.
- 11. If you want see your results displayed in list format click Browse.



12. This list can be sorted by clicking on the headers.

0	Q	🔲 Browse			obal*	PDF		Word Email	() Attach	Notes	📆 Audit 🔝 Maplink*	Show/Hide Cols Customize Screen Form	Return			
Accept Curren	ocoren		August 1	D	uplicate	Q Preview	CALCE!	Schedule	ALLOCIT		Alerts*		The Control			
Confirm		Search		Actions		Output	C	iffice		Tools		Menu				
Record M	Number	Ye	ar	PO#	Vendor Nam	e		PO Da	ate		Order	Amount	Balance	Status	Fiscal Period	A Dept Code
	1	20	17	20170002	CONTRAX P	URNISH		07/01	/2016			3,224.56	3,224.56	8 - Printed	1	989
	2	20	17	20170003	CONTRAX P	URNISH		07/01	/2016			6,359.96	6,359.96	8 - Printed	1	989
	3	20	17	20170004	CONTRAX	URNISH		07/01	/2016			3,728.68	3,728.68	8 - Printed	1	989
	4	20	17	20170005	CONTRAX	URNISH		07/01	/2016			6,409.54	6,409.54	8 - Printed	1	989
	5	20	17	20170006	CONTRAX	URNISH		07/01	/2016			3,713.69	3,713.69	8 - Printed	1	989
	6	20	17	20170007	CONTRAX P	URNISH		07/01	/2016		1	2,395.24	12,395.24	8 - Printed	1	989
	7	20	17	20170008	CONTRAX P	URNISH		07/01	/2016			5,749.02	5,749.02	8 - Printed	1	989
	8	20	17	20170009	CONTRAX P	URNISH		07/01	/2016			4,336.32	4,336.32	8 - Printed	1	989
	9	20	17	20170010	CONTRAX P	URNISH		07/01	/2016			1,250.23	1,250.23	8 - Printed	1	989
	10	20	17	20170011	CONTRAX P	URNISH		07/01	/2016		1	0,341.76	7,056.76	8 - Printed	1	989
	11	20	17	20170012	CONTRAX P	URNISH		07/01	/2016			4,034.08	4,034.08	8 - Printed	1	989
	12	20	17	20170013	SIERRA SC	HOOL E		07/01	/2016		3	1,535.90	31,535.90	8 - Printed	1	989
	13	20	17	20170014	SIERRA SC	HOOL E		07/01	/2016		3	3,468.45	33,468.45	8 - Printed	1	989
	14	20	17	20170015	SIERRA SC	HOOL E		07/01	/2016		3	9,584.25	39,584.25	8 - Printed	1	989
	15	20	17	20170016	SIERRA SC	HOOL E		07/01	/2016		5	7,485.31	57,485.31	8 - Printed	1	989
	16	20	17	20170017	SIERRA SC	HOOL E		07/01	/2016		5	2,251.33	52,251.33	8 - Printed	1	989
	17	20	17	20170092	AMAZON.C	MC		07/05	/2016			4,000.00	4,000.00	8 - Printed	1	989
	18	20	17	20170093	SOUTHWES	ST SCHOO		07/05	/2016			5,000.00	5,000.00	8 - Printed	1	989
	19	0 20	17	20170094	SOUTHWES	ST SCHOO		08/02	/2016			81.03	81.03	5 - Released	1	989
	20	0 20	17	20170095	SCHOOL SE	PECIALT		08/02	/2016			70.63	70.63	5 - Released	1	989
	21	20	17	20170109	MARY KITC	HEN		09/07	/2016			1.10	1.10	5 - Released	1	989

13. You can add/remove columns by clicking on the Show/Hide Cols option. In this screen you can select what you want to show on your report.

	Show	Hide Columns	12403000	0	Balance Statu	s		
Select col	umns to show:				Record Number			
X	Column Heading				Year			
7	Balance			1.2	Vendor Name			
1	Status			^	PO Date			
1	Fiscal Period			1.1	Balance			
	Modification Count				Status	$\sim$		
	Requisition				Modification Count			
	Buyer ID				Reset column sort			
	Entry Date				Show all columns	-		
	Expire Date				Hide all but selected	-		
10	Required By Date			~	Reset settings Freeze to left			
	Last Change Date							
1					Freeze to right			
0	Show All	Reset	Cancel		Unfreeze all			

14. I find it useful to add the Requisition number to the results.

15. You can also resize and rearrange the columns by picking up the header and moving it.

16. You can also Right Click on the header. This pop-up has more settings including the ability to Freeze and Hide Columns.

<b>Accept</b>	Ø Cancel	Q Search	Browse	Add U	pdate Duplicate	Print	PDF	X Excel	Word	Attach	otes 🖹 Audit otify 🔝 Maplink*	Show/Hide Cols Customize Screen F	Form Return
Cont	firm		Search		Actions		Output		Office		Tools	Menu	
Recor		Year	Requisition	PO#	Vendor Name		PO Date		Order Amo	Balance	Status	Dept Code	
1	7	2017	17000123	20170092	AMAZON.COM		07/05/201	6	4,000.00	4,000.00	8 - Printed	989	
	1	2017	17000030	20170002	CONTRAX FURNIS	н	07/01/201	6	3,224.56	3,224.56	8 - Printed	989	
	2	2017	17000032	20170003	CONTRAX FURNIS	н	07/01/201	6	6,359.96	6,359.96	8 - Printed	989	
	3	2017	17000033	20170004	CONTRAX FURNIS	н	07/01/201	6	3,728.68	3,728.68	8 - Printed	989	
	4	2017	17000034	20170005	CONTRAX FURNIS	н	07/01/201	6	6,409.54	6,409.54	8 - Printed	989	
	5	2017	17000035	20170006	CONTRAX FURNIS	н	07/01/201	6	3,713.69	3,713.69	8 - Printed	989	
	6	2017	17000036	20170007	CONTRAX FURNIS	н	07/01/201	6	12,395.24	12,395.24	8 - Printed	989	
	7	2017	17000038	20170008	CONTRAX FURNIS	н	07/01/201	6	5,749.02	5,749.02	8 - Printed	989	
	8	2017	17000039	20170009	CONTRAX FURNIS	н	07/01/201	6	4,336.32	4,336.32	8 - Printed	989	
	9	2017	17000040	20170010	CONTRAX FURNIS	н	07/01/201	6	1,250.23	1,250.23	8 - Printed	989	
1	0	2017	17000041	20170011	CONTRAX FURNIS	н	07/01/201	6	10,341.76	7,056.76	8 - Printed	989	
1	1	2017	17000042	20170012	CONTRAX FURNIS	н	07/01/201	6	4,034.08	4,034.08	8 - Printed	989	
2	1	2017	17000276	20170109	MARY KITCHEN		09/07/201	6	1.10	1.10	5 - Released	989	
2	0 (	2017	17000274	20170095	SCHOOL SPECIAL	Г	08/02/201	6	70.63	70.63	5 - Released	989	
1	2	2017	17000043	20170013	SIERRA SCHOOL E		07/01/201	6	31,535.90	31,535.90	8 - Printed	989	
1	3	2017	17000044	20170014	SIERRA SCHOOL E		07/01/201	6	33,468.45	33,468.45	8 - Printed	989	
1	4	2017	17000045	20170015	SIERRA SCHOOL E		07/01/201	6	39,584.25	39,584.25	8 - Printed	989	
1	5	2017	17000046	20170016	SIERRA SCHOOL E		07/01/201	6	57,485.31	57,485.31	8 - Printed	989	
1	6	2017	17000047	20170017	SIERRA SCHOOL E		07/01/201	6	52,251.33	52,251.33	8 - Printed	989	
1	8	2017	17000124	20170093	SOUTHWEST SCH	00	07/05/201	6	5,000.00	5,000.00	8 - Printed	989	
1	9 (	2017	17000274	20170094	SOUTHWEST SCH	00	08/02/201	6	81.03	81.03	5 - Released	989	

17. On the above example I added the Requisition column, moved it to beside the PO #, resized all the columns and removed the Fiscal Period column.

18. This report can be Printed, exported as a PDF or to Excel.



19. When you click on Excel you may see this message displayed at the bottom left of your screen.

#### Generating Microsoft Excel file on server. Please wait ...

- 20. The Excel Spreadsheet will open.
- 21. You can save and/or close the Excel spreadsheet to return to Munis.
- 22. You can close Browse (Purchase Order Inquiry) by clicking Return

#### This technique can also be used to Search by Search by Year, Status and Type

#### Search By Requisition Number

- 1. Open Purchase Order Inquiry
- 2. Click Search



#### 3. The PO Inquiry Find screen will open.



4. Enter the requisition number in the Requisition number box.



#### 5. Click Accept

F:\Munis Dashboard User Guide - Purchasing.docx Revised: February 5, 2020 Printed: 12/10/2020 1:57 PM 6. The requisition you searched for will display.

#### Search by GL details

#### 1. Click GL Find.

The program displays the GL Segment Find screen.



- 2. Complete one or more of the account-related fields.
- 3. Click Accept to execute the search.