



***MUNIS DOCUMENTATION***

***THE CITY OF  
RICHMOND, CALIFORNIA***

***Approving Official  
Requisition Approval Process***

## Procedure

1. Open the Requisition Entry program in the MUNIS Menu:  
*Tyler Menu → Financials → Purchasing → Purchase Order Processing → Requisition Approvals*

Tyler Menu ⋮

- ▼ Munis
  - ▼ Financials
    - > General Ledger Menu
    - > Budget Processing
  - ▼ Purchasing
    - > Setup
    - ▼ Purchase Order Processing
      - Item Marketplace
      - Item Order Form Requests
      - Requisitions
      - Requisition Entry
      - Requisition Approvals
      - Requisition Conversion
      - Requisition Import

**You will see any Purchase Requisitions that need your approval.**

Requisition Approvals [CITY OF RICHMOND     10/14]											
Back	Search	Output	Print	Save	Select	Sort	Approve Others	Approve Dept	Approval Comments	Approve All	Process
Code	Year	Req #	Process	Entered by	Description	Type	Amount	Justification			
2022	00025709	REQ	6473ntho	ANNUAL SUBSCRIPTION	AMT	5,040.00	Not Needed				
2022	00025731	REQ	6473mgue	PRVD VIOLENCE PREVENTION & INTERVEN	AMT	375,000.00	Not Needed				
2022	00025791	REQ	6473acre	APM ON-CALL SANITARY SEWER & STORM	AMT	24,737.50	Not Needed				
2022	00025792	REQ	6473acre	STEGE ANNUAL SWR SERVICE CHARGES (C	AMT	30,704.00	Not Needed				
2022	00025819	REQ	6473oalv	TEST- FINANCIAL SERVICES FOR THE RHA	AMT	1.00	Not Needed				
2022	00025822	REQ	6473oalv	CONSULTING SERVICES FOR THE FINANCE	AMT	.00	Not Needed				



Click on the Select icon -

- This will allow you to review the requisition prior to (A) Approve or (R) Reject the requisition.

Requisition Approvals [CITY OF RICHMOND | | 10/14]

Back Search Output Print Save **Select** Sort Approve Others Approve Dept Approval Comments Approve All Process

Code	Year	Req #	Process	Entered by	Description	Type	Amount	Justification
	2022	00025709	REQ	6473ntho	ANNUAL SUBSCRIPTION	AMT	5,040.00	Not Needed
	2022	00025731	REQ	6473mgue	PRVD VIOLENCE PREVENTION & INTERVEN	AMT	375,000.00	Not Needed
	2022	00025791	REQ	6473acre	APM ON-CALL SANITARY SEWER & STORM	AMT	24,737.50	Not Needed
	2022	00025792	REQ	6473acre	STEGE ANNUAL SWR SERVICE CHARGES (C	AMT	30,704.00	Not Needed
	2022	00025819	REQ	6473oalv	TEST- FINANCIAL SERVICES FOR THE RHA	AMT	1.00	Not Needed
	2022	00025822	REQ	6473oalv	CONSULTING SERVICES FOR THE FINANCE	AMT	.00	Not Needed

A grid will appear around each Purchase Requisition description. Click the “View Requisition” key. This will take you to the actual requisition.

Requisition Approvals [CITY OF RICHMOND | | 10/14]

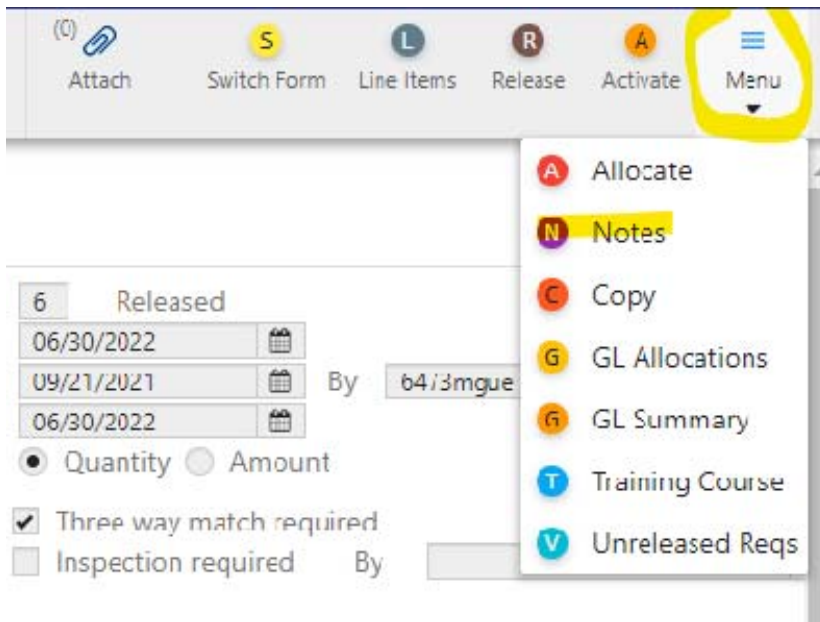
Back Accept Cancel Search **View Requisitions**

Code	Year	Req #	Process	Entered by	Description	Type	Amount
▼	2022	00025709	REQ	6473ntho	ANNUAL SUBSCRIPTION	AMT	5,040.00
▼	2022	00025731	REQ	6473mgue	PRVD VIOLENCE PREVENTION & INT	AMT	375,000.00
▼	2022	00025791	REQ	6473acre	APM ON-CALL SANITARY SEWER & S	AMT	24,737.50
▼	2022	00025792	REQ	6473acre	STEGE ANNUAL SWR SERVICE CHARG	AMT	30,704.00

You will now see all general information for the requisition. Here is where you will verify that the proper procedures were followed and documentation is attached.

If any of the note buttons are highlighted yellow this means that there are file notes you may see. You may click on any note button to view.

\*Always click on the “NOTES” button on the top right MENU to see if there are any REJECTION notes. These notes can be your notes or Purchasing notes.

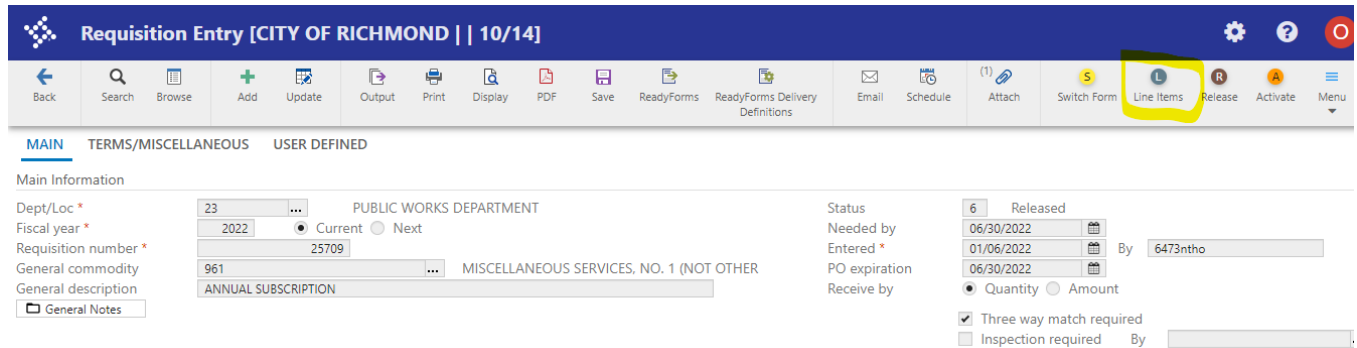


**Click the paper clip icon on the tool bar to be able to access all documentation attached to the Purchase Requisition. Clicking on each document will allow you to review each item.**

**Make any manual notes as to what may be missing. After you have reviewed the documentation click on the “Return” button which will put you back at the Purchase Requisition.**

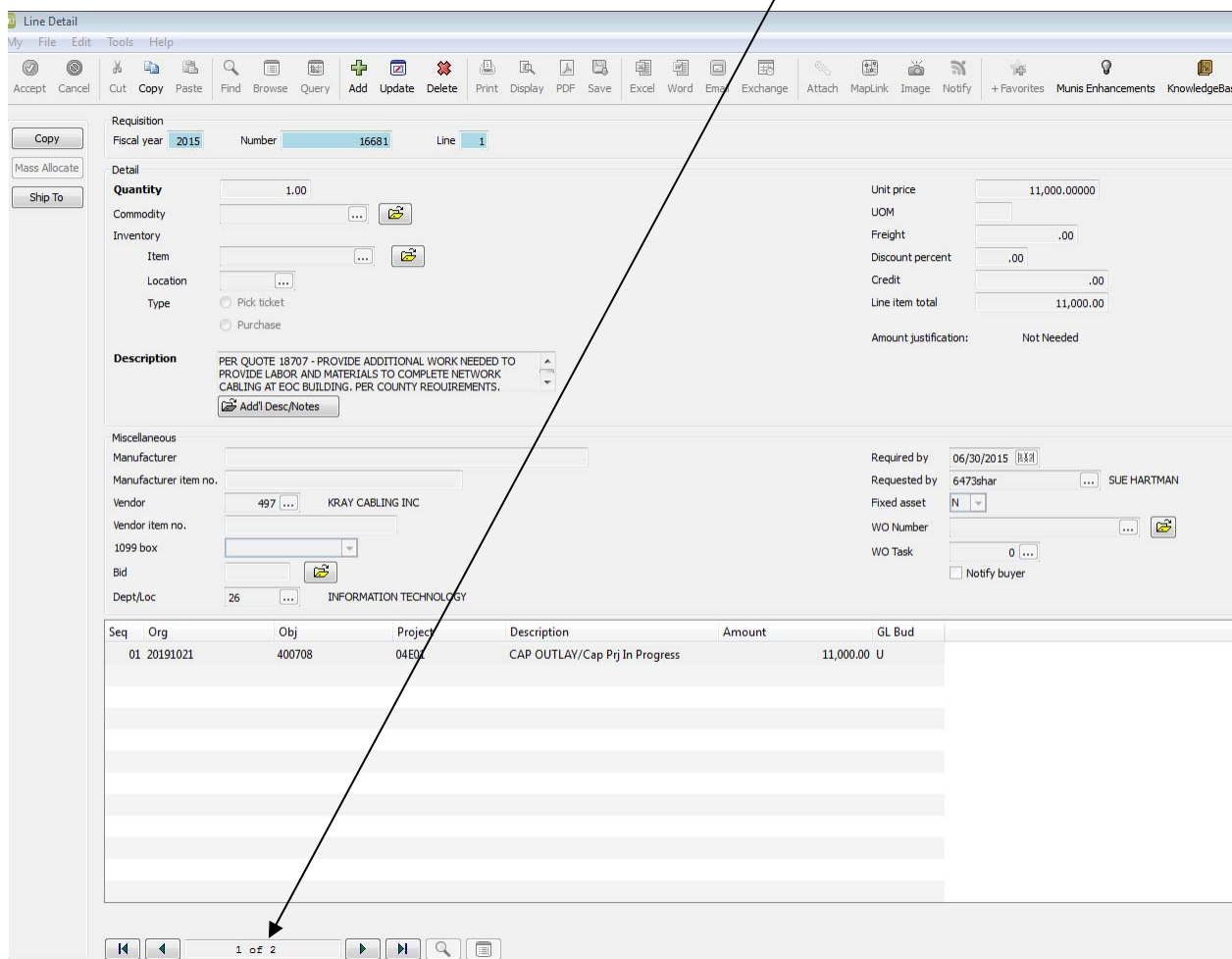
Attachments						
Back	Accept	Search	Add	Update	Delete	Return
Description	File	Public	Date Added	Time Added		
2021/2022 FY INVOICE	Dude Solutions INV-96822.pdf	<input type="checkbox"/>	09/14/2021	11:44:52		

Next - Click “Line Items” button. You will see value, description, account strings.

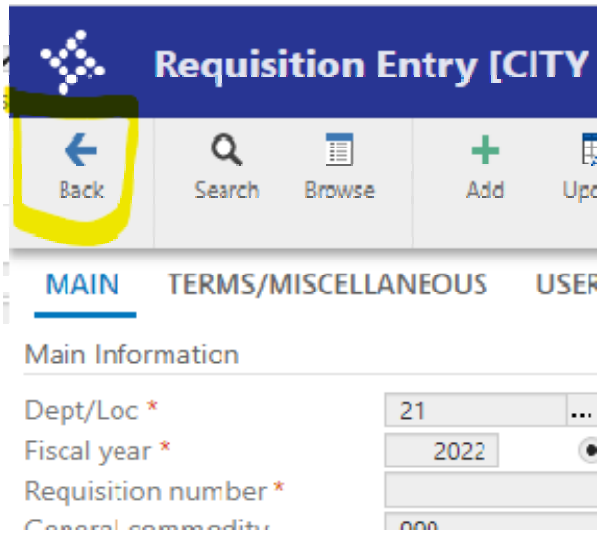


You will now verify between the attached documents and the “Line Detail” that amounts, account strings and descriptions are correct. Make manual notes as necessary. These notes will be used if you are to “Reject” this requisition.

At the bottom of the screen you will see (on this example) “1 of 2”. If it says for example “1 of 5” then you will click on the right arrow at the bottom of the screen to view the additional lines as you did the first.



After you have completed the review, click on “Back” to Exit.

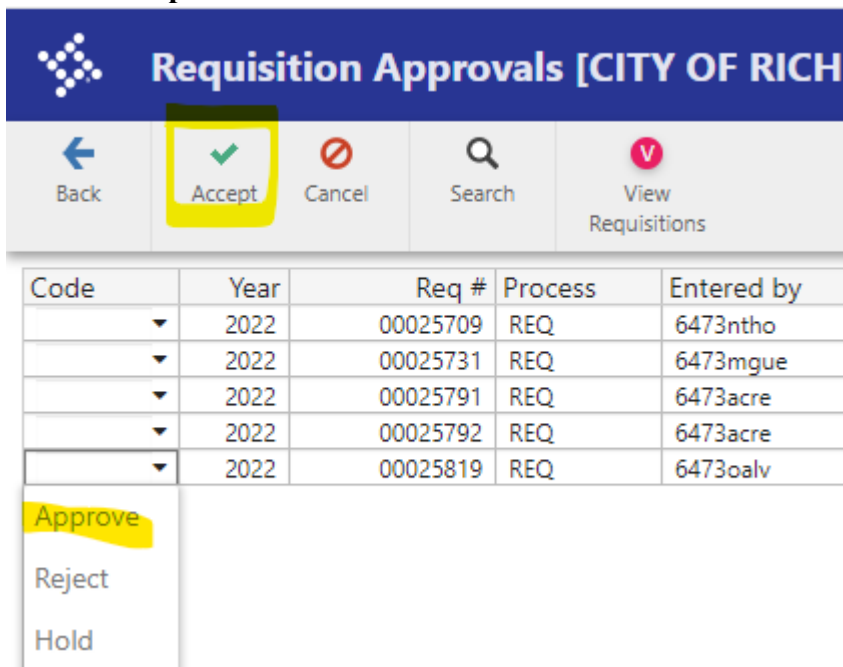


This will take you back to the “Requisition Approval” screen.

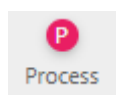
At this screen you will indicate Approve or Reject.

### Approving a Requisition

1. Select “Approve” from the Drop Down menu under Code. type a capital.
2. Click “Accept” from the Main Menu




3. Click “Process” Icon

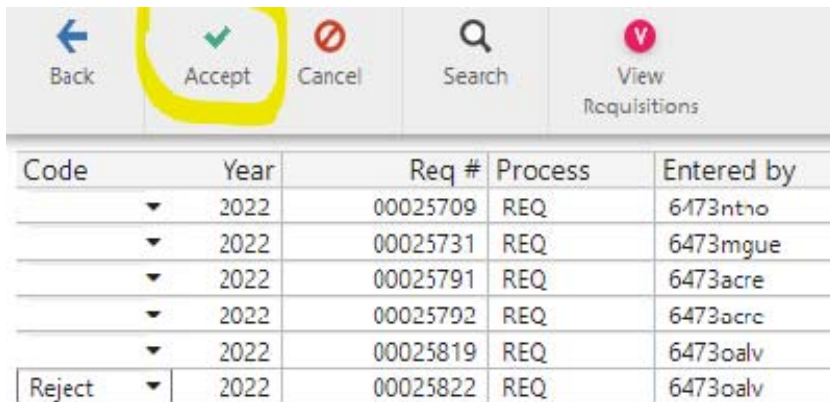


When you approve the requisition it will proceed through Workflow to the next approver. If any of the following approvers reject this requisition, the requisitioner will be required to make the appropriate changes and release the requisition again into Workflow. You may see this requisition again.


This is where your manual notes will be necessary.

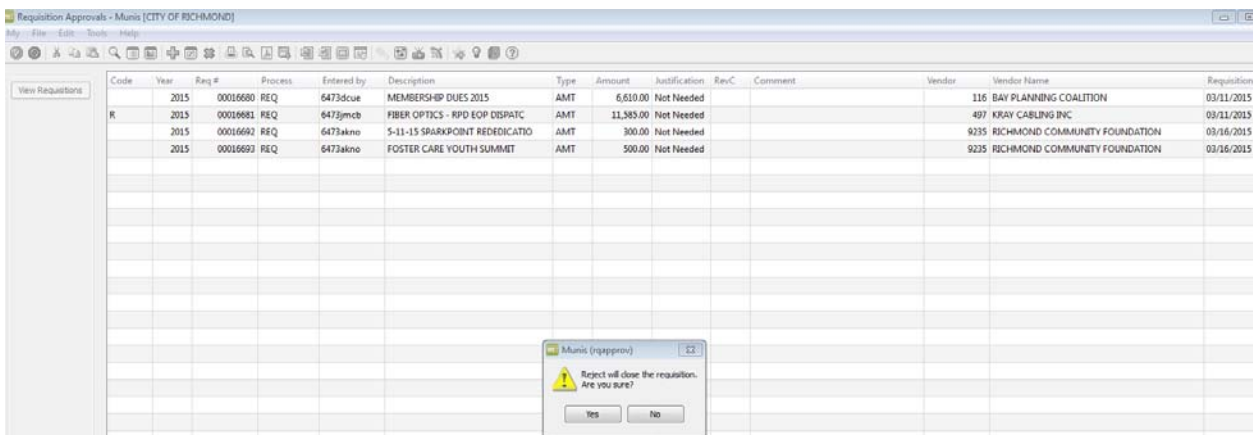
**Rejecting a Requisition**

If you Reject, you place an R in the left hand box and hit the green check mark  Accept. A rejection box will appear.

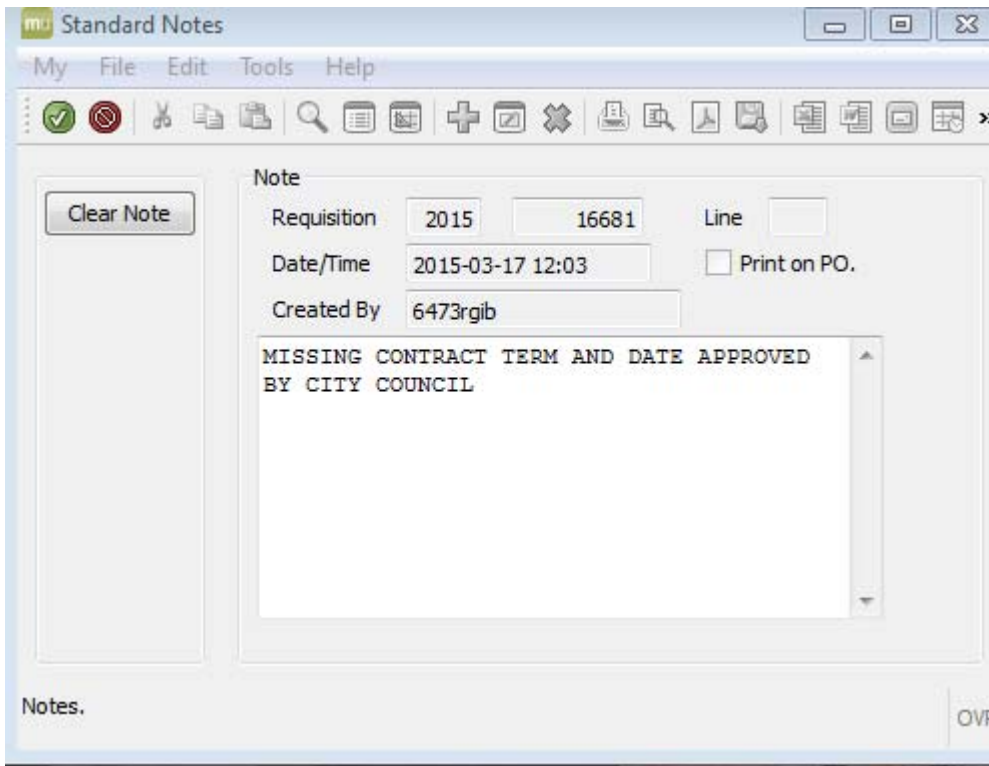



Code	Year	Req #	Process	Entered by
▼	2022	00025709	REQ	6473ntno
▼	2022	00025731	REQ	6473mgue
▼	2022	00025791	REQ	6473acre
▼	2022	00025792	REQ	6473acre
▼	2022	00025819	REQ	6473oalv
Reject ▼	2022	00025822	REQ	6473oalv


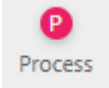
Click “Yes”. At this time a small text box will pop up. Click on the  . This will allow you add the reasons you are rejecting and the items that are missing. ALL TYPING MUST BE IN CAPITAL LETTERS AND AT THE END OF THE LINE YOU MUST TAB TO THE NEXT LINE IF YOUR WORD DOES NOT FIT.



Code	Year	Req #	Process	Entered by	Description	Type	Amount	Justification	Rev/C	Comment	Vendor	Vendor Name	Requisition
	2015	00016680	REQ	6473dcue	MEMBERSHIP DUES 2015	AMT	6,610.00	Not Needed			116	BAY PLANNING COALITION	03/11/2015
R	2015	00016681	REQ	6473mcb	FIBER OPTICS - RPD EOP DISPATC	AMT	11,385.00	Not Needed			497	KRAY CABLING INC	03/11/2015
	2015	00016692	REQ	6473akino	5-11-15 SPARKPOINT REDEDICATIO	AMT	300.00	Not Needed			9235	RICHMOND COMMUNITY FOUNDATION	03/16/2015
	2015	00016693	REQ	6473akino	FOSTER CARE YOUTH SUMMIT	AMT	500.00	Not Needed			9235	RICHMOND COMMUNITY FOUNDATION	03/16/2015



After typing your reasons for rejection, click on the green check icon  . Then click “Back” icon to Exit.

This will take you back to the “Requisition Approval” screen. After you have either “Approved” or “Rejected” hit the green check  and then the “Process”  icon. Wait until the screen has cleared those Requisitions.

When you reject the requisition it will be forwarded back to your Requisitioner.