



MUNIS DOCUMENTATION

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

***FINDING REQUISITIONS and
THE STATUS OF THE
REQUISITION***

Overview

There are many reasons you would want to find a Requisition after it has been created in MUNIS.

- Check to see where it is in the Approval process
- Make corrections to a Rejected Requisition
- Delete unwanted Requisitions
- Find the PO number related to the requisition
- Find all your rejected requisitions

All requisitions can be found in the Requisition Entry program regardless of their status (Approved, Converted, etc.)

Procedure

1. Open the Requisition Entry program in the MUNIS Menu:

Financials > Purchasing > Purchase Order Processing > Requisition Entry


The screenshot shows the MUNIS menu structure on the left, with 'Requisition Entry' highlighted under 'Purchase Order Processing'. The main interface displays the 'Requisition Entry' form with various fields and options.

Menu Structure:


- ▼ 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
 - Requisition Export
 - Purchase Order Entry
 - Print Purchase Orders
 - Purchase Order Change Order
 - Purchase Order Receiving

Form Fields:



- Main Information:** Dept/Loc, Fiscal year (Current/Next), Requisition number, General commodity, General description, General Notes.
- Status:** Needed by, Entered (By), PO expiration, Receive by (Quantity/Amount).
- Options:** Three way match required, Inspection required (By).
- Vendor Information:** Vendor, Name, PO mailing, Committed.
- Shipping Information:** Ship to.


2. Click the Search  icon, and enter data in one or more of the available fields

Tip: The more unique the information the more you can narrow down your search.

- Requisition Number- if you know the number of the requisition enter that number in the Requisition Number field and click the Accept icon .
- User Id plus Date and/or Status – enter your user id in the By field and the date the requisition was entered or the status of the requisition (*use wildcards such as >, < or = in the date field*)
- Vendor plus User ID - enter the vendor number plus your user id

The most common search fields used are:

Field	Description
Dept/Loc	Enter the Dept/Loc code of the requesting department or click on the field help  icon (or F9) to display a list of valid codes.
Fiscal Year	Enter the fiscal year in which the requisition was created.
Requisition Number	System generated number assigned to the requisition.
Vendor	The vendor number as set up in the Accounts Payable and Purchasing modules. Type a code or click the help  icon at the far right of the field (or F9) for the vendor help screen. <i>Refer to the document on Finding a Vendor Number for additional info.</i>
Status	0 = Converted to a PO 1 = Rejected by an approver 2 = Creation (header created but GL detail not completed) 4 = Allocated (GL allocation completed) but not released 6 = Released for Approval 8 = Approved Note: <i>You can find multiple status' by using the : and signs. For instance if you want 6's and 1's enter 6 1, if you want 1's, 2's & 4's enter 1:4</i>
Needed by	Date the services or goods are needed by
Entered	Date requisition was created. Note: <i>Use > or < signs if you don't know the exact date. For example if today is June 20, 2021 and you know the req was created sometime earlier in the month you can enter > 053114.</i>
By	User id of the requisition creator

3. Click the Accept icon  on the toolbar to display the search results.

In this example, we did a search for requisitions with a status of 6(released) which will show us requisitions that are still waiting to be approved.

- The total number of records found is indicated at the bottom of the screen. Use the right and left arrows to look at the next or previous record.

- Click the Browse  icon to see all the items in a list.

Record	Year	Requisition	Entry Date	Description	Amount	Purchase Order	Status
1	2022	25822	01/06/2022	CONSULTING SERVICES FOR THE FI	0.00		Released
2	2022	25820	01/04/2022	CONSULTING SERVICES FOR THE FI	1.00		Released
3	2022	25819	01/03/2022	TEST- FINANCIAL SERVICES FOR T	1.00		Released
5	2022	25801	10/14/2021	MACKS PROJECT MANAGEMENT WA#44	3,180.72		Released
10	2022	25642	08/25/2021	ACTUARIAL SERVICES FRO ADR/CAR	14,670.00		Released
7	2022	25791	10/13/2021	APM ON-CALL SANITARY SEWER & S	24,737.50		Released
6	2022	25792	10/13/2021	STEGE ANNUAL SWR SERVICE CHARG	30,704.00		Released
4	2022	25806	10/14/2021	LWA - NPDES PERMIT SUPPORT SRVC	32,500.00		Released
9	2022	25731	09/21/2021	PRVD VIOLENCE PREVENTION & INT	375,000.00		Released
8	2022	25783	10/13/2021	OWEN EQUIPT - PURCHASE 2 VACTO	1,054,907.49		Released

Workflow for Requisitions

Overview

Workflow is a system of checks and balances throughout the purchasing process. Specifically, Workflow requires that a newly-entered requisition be approved before it can transition to the next step: conversion to a purchase order. Workflow will not notify approvers of a new requisition via e-mail or the MUNIS Inbox

Once you release your requisition, you can view the workflow by clicking on the “Approvers” box.

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

Back Search Browse Add Update Delete Output Print Display PDF Save ReadyFo

PASADENA CA 91110-0743 R

Delivery method Print Fax E-Mail

Remit 1 RICOH USA, INC

Vendor/Sourcing Notes Vendor Quotes (0)

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description
1					CONSULTING SERVICES FOR T

Total amount .00

Workflow

My Approvals
Approve
Reject
Forward
Hold
Approvers

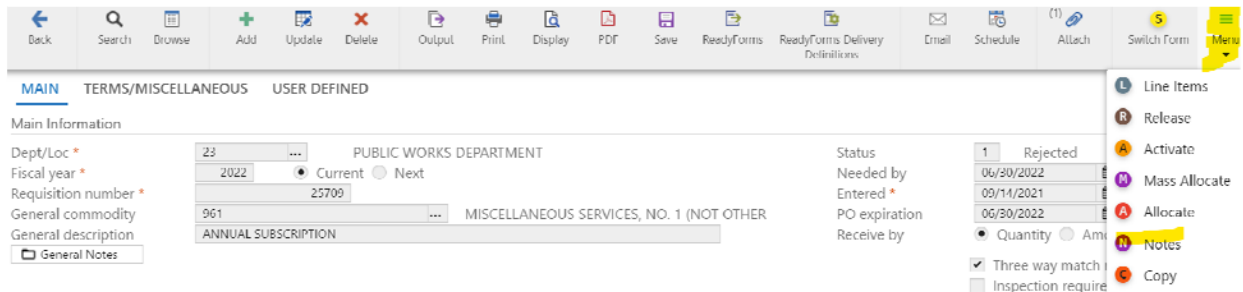


You can see if the requisition is in your approving official's queue or in the purchasing queue. For example, the requisition below is in the Purchasing queue on hold "Awaiting approved exception form".

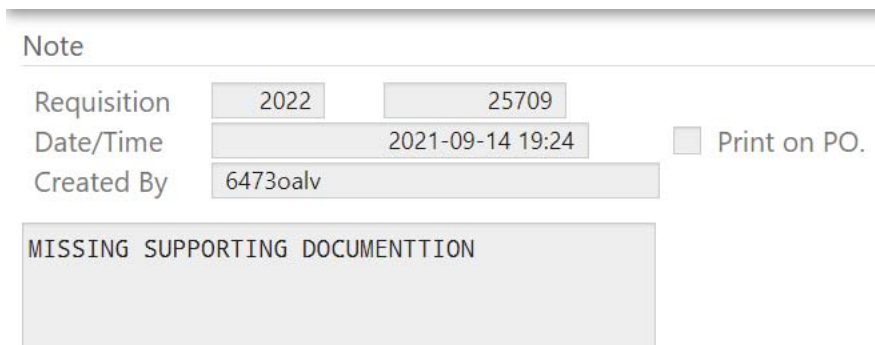
Steps			Details		
Step	Status	Activate	Approver:	SHARRONE TAYLOR	Source Bus Rule: 1888
20	In Progress		Status:	Current	
<ul style="list-style-type: none"> Any approver from this group Group Current SHARRONE TAYLOR 08/25/20 			Approval type:	AMT - Dollar Based	
80	Not started		Step:	20	
			Action needed:	Approve	
			Active date:	08/25/2021	
			Active time:	19:06	
			Time limit:		
			Approver Group:	Any approver from this group can complete the group	


Rejected Requisitions

Rejected requisitions will have a status of 1-Rejected. You can view the reason for rejection by going to the “NOTES” box on the top right side of the screen.



Make sure you click on the Rejection Note to view the full description of the rejection.



In order to edit/correct a rejected requisition, click “ACTIVATE” from the drop down Meny on the top right side of the screen, make the corrections & click the Accept icon . Then release

the requisition.  to return to the main Menu.

