



MUNIS DOCUMENTATION

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

How To Copy Requisitions

Overview

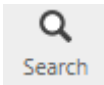
The City of Richmond creates annual Purchase Orders. It is helpful to copy requisitions each year.

Procedure


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

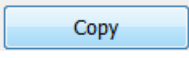
Double Click onFinancials > Purchasing > Purchase Order Processing > Requisition Entry

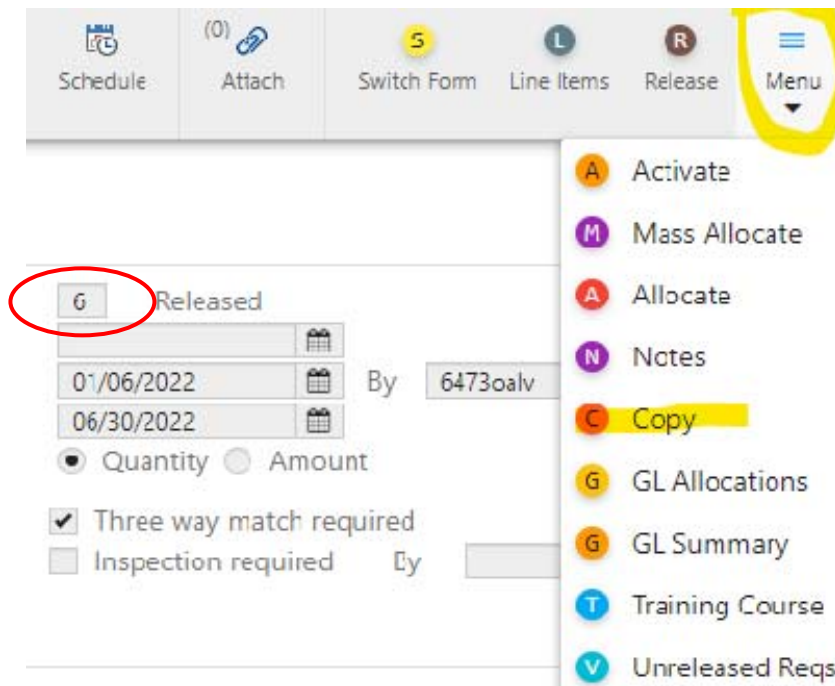
The image shows a screenshot of a software application. At the top, a window titled "Tyler Menu" contains a search bar and a tree view. The tree view is expanded to show "Munis" > "Financials" > "Purchasing" > "Purchase Order Processing" > "Requisition Entry". Below this is a toolbar with icons for Back, Search, Browse, Add, Update, Delete, Output, Print, Display, PDF, Save, ReadyForms, ReadyForms Delivery Definitions, Email, Schedule, Attach, and Switch. Below the toolbar are tabs for "MAIN", "TERMS/MISCELLANEOUS", and "USER DEFINED". The main area is divided into "Main Information" and "Vendor Information". "Main Information" includes fields for Dept/loc, Fiscal year, Requisition number, General commodity, General description, Status, Needed by, Entered, PO expiration, Receive by, and checkboxes for "Three way match required" and "Inspection required". "Vendor Information" includes fields for Vendor Name, PO mailing, and a "Committed" checkbox. "Shipping Information" includes a "Ship to" field.

2. Click the Find  icon, and enter data in one or more of the available fields to find the requisition that will be copied.

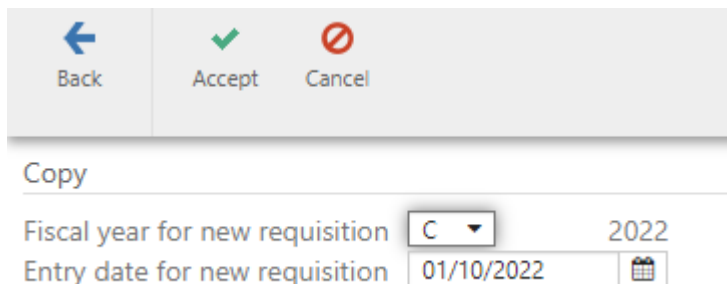
Tip: The more unique the information the more you can narrow down your search.

- Requisition Number- if you know the number of the requisition enter that number in the Requisition Number field and click the Accept icon .

3. Click on the  icon on the left hand side of the screen.

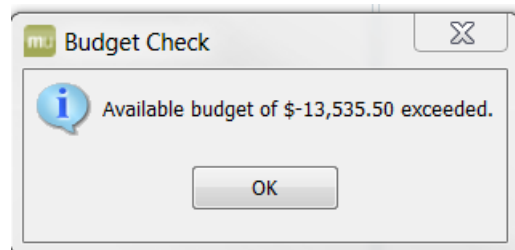


The following screen will pop up. There is a drop down option of C or N on the “Fiscal year of new requisition”. Finance closes the Fiscal year mid October. If you are copying a requisition before the year closes Select “N” for next year. Once the year closes in mid October, use “C” for current year.



4. Once the requisition is copied, you will get an exact replica of the requisition. You will need to make any necessary changes, such as adding a needed by date, updating amounts or description.

NOTE: If there are not enough funds or budget is not in place yet, you will get the following message.



If you click ok and cancel on the following screen, part of your requisition will be copied. You will need to enter the line item information to complete the requisition.

5. Once all the information has been completed, hit release to release the requisition into workflow.