A How-to Guide

The Requisition Entry program accepts and processes requisitions, which are department purchase requests that precede purchase order issue. With these instructions, the end-user will be able to enter a requisition, add an attachment and review the requisition approvers.

Open the FWISD homepage > Employees> My FWISD ClassLink Portal or click the Classlink icon on the desktop.

Locate and click on the Munis icon

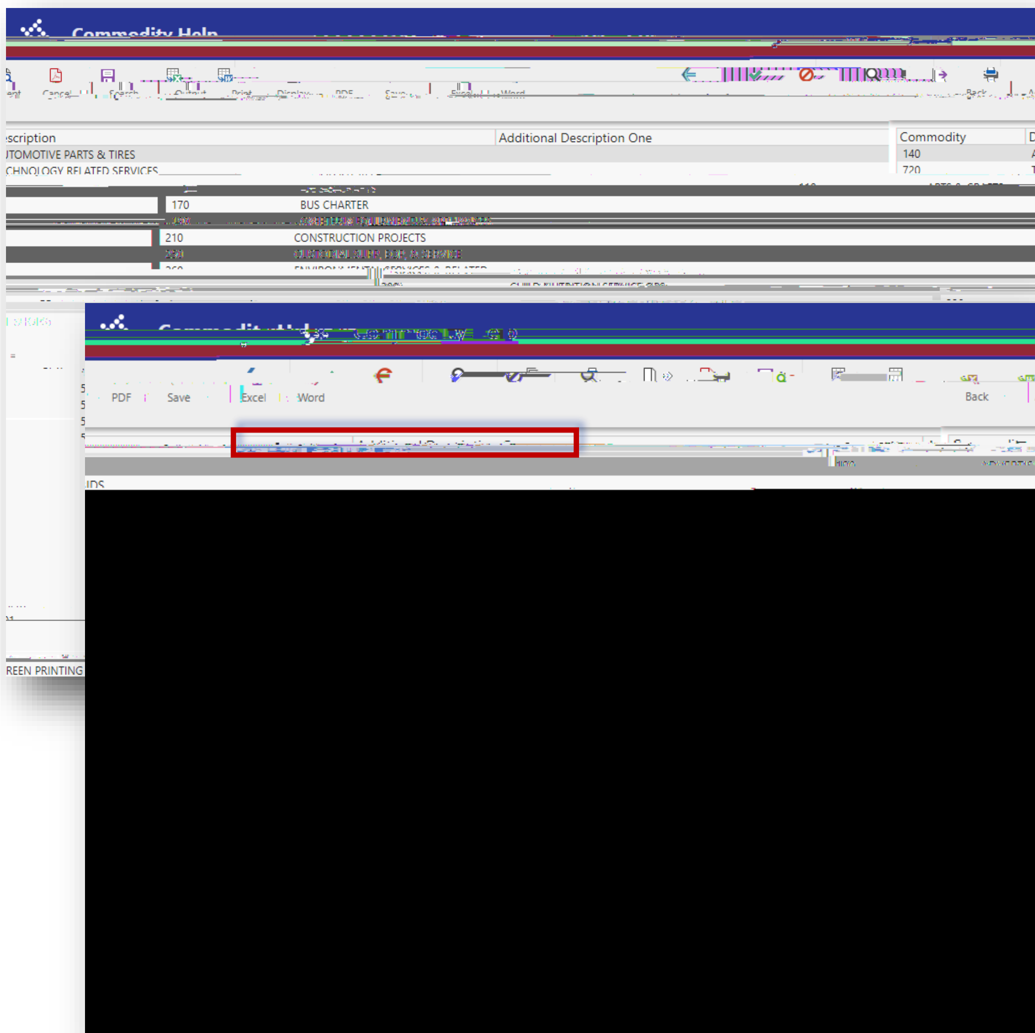
Press the tab key to reach the General commodity field.

Click on the ellipses ... to view a list of the General Commodity codes.

The Commodity Help window will open with a list of commodity codes.

To make searching easier, left click on Description at the top of the list and the commodities will be in alphabetical order.

Click Accept or double click the commodity to select it.



: For general supplies, do not need to enter General Notes for the requisition.

When using *federal funds*, must enter information on how the purchase will support the CIP goals of the district.

: Name of the event or reason for the rental, the date of the rental and the associated agenda.

: Enter the name/s of the persons who will be picking up the card.

If there are questions about notes, for reqs using federal funds, contact the Grants Dept. For any other req, contact the Purchasing Dept.

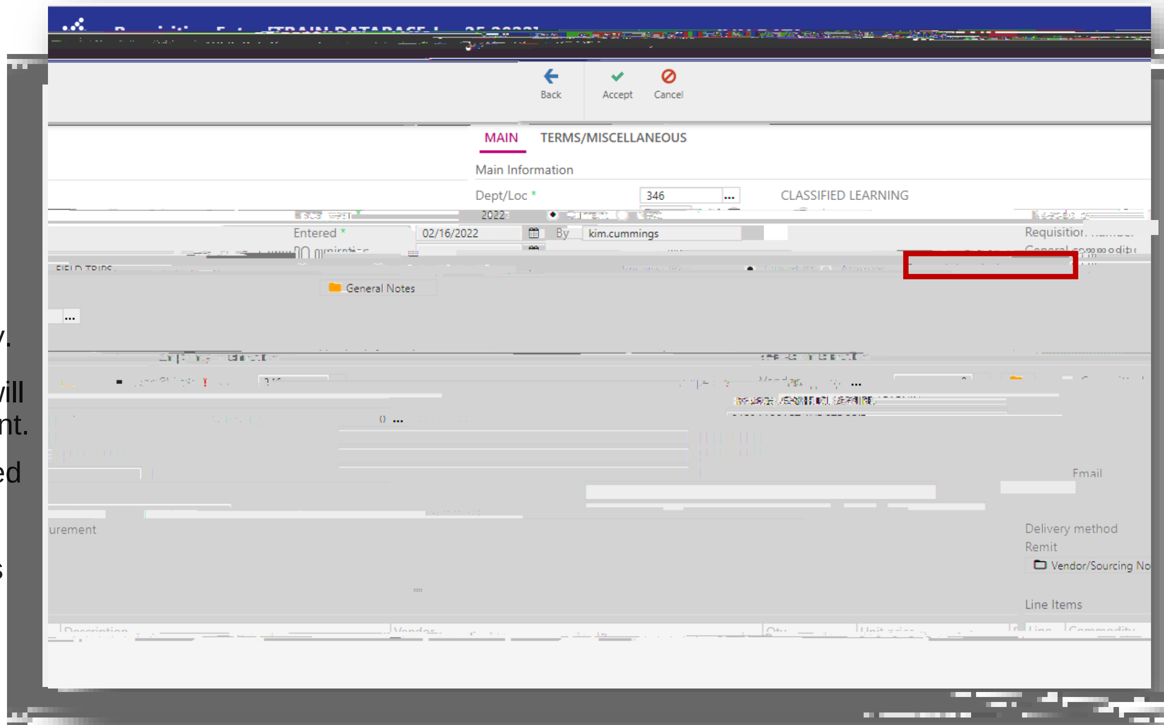
Click on Quantity or Amount.

This option affects the receiving steps.

Quantity is chosen if receiving by line item quantity.

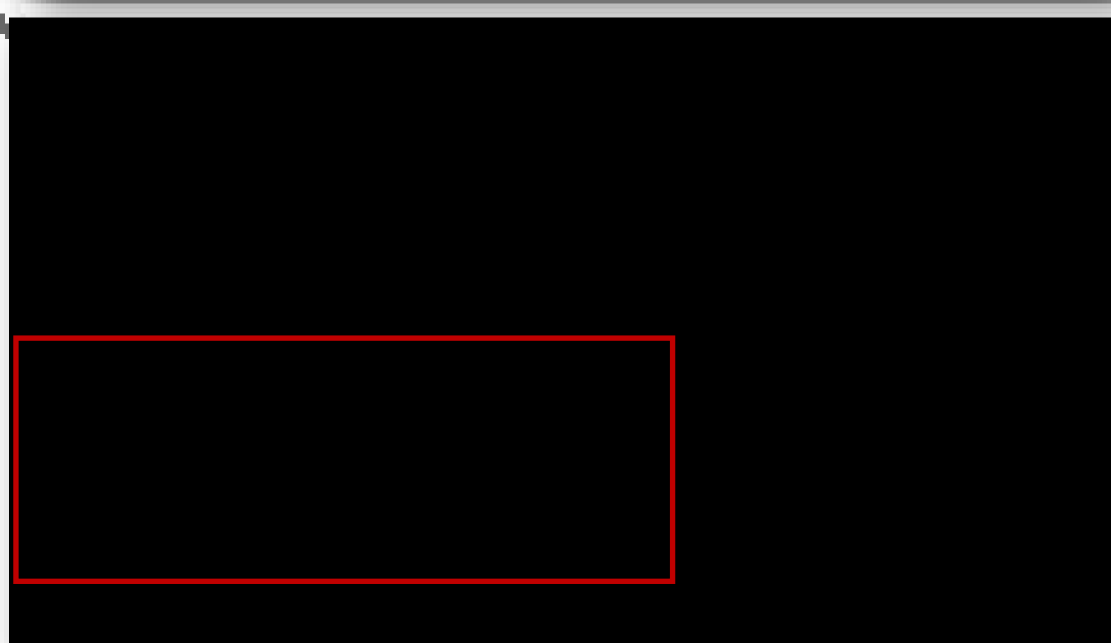
Amount is chosen if the req will be received by a dollar amount.

This option cannot be changed once the end-user clicks the accept button to accept the requisition. If a change needs to be made, it must be done before clicking the accept button.



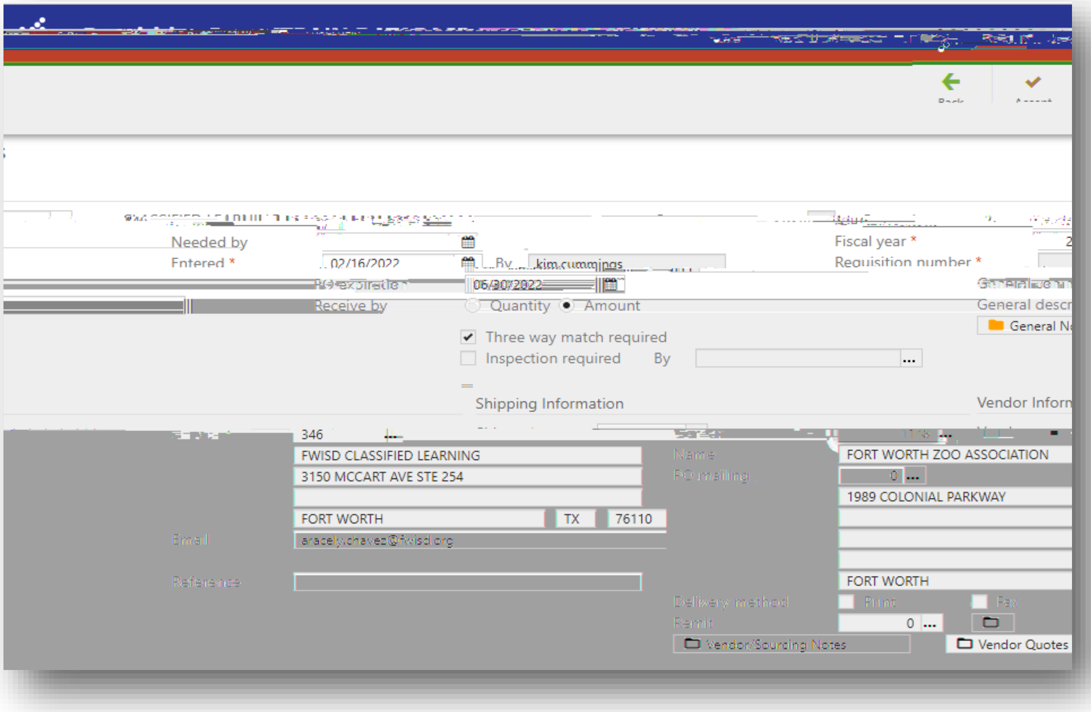
Press the tab key to the Vendor Information.

Munis will automatically populate Needed by, Entered, By and PO expiration date.



If you do not already know
the

The main requisition screen will display with the Vendor's Name and PO mailing address automatically populated.



Press the tab key to reach the Ship to and Email fields.

These fields will athe calhe

Type in the account number.

Creating multiple lines using the same budget.:

Enter the GL account on line 1 of the requisition.

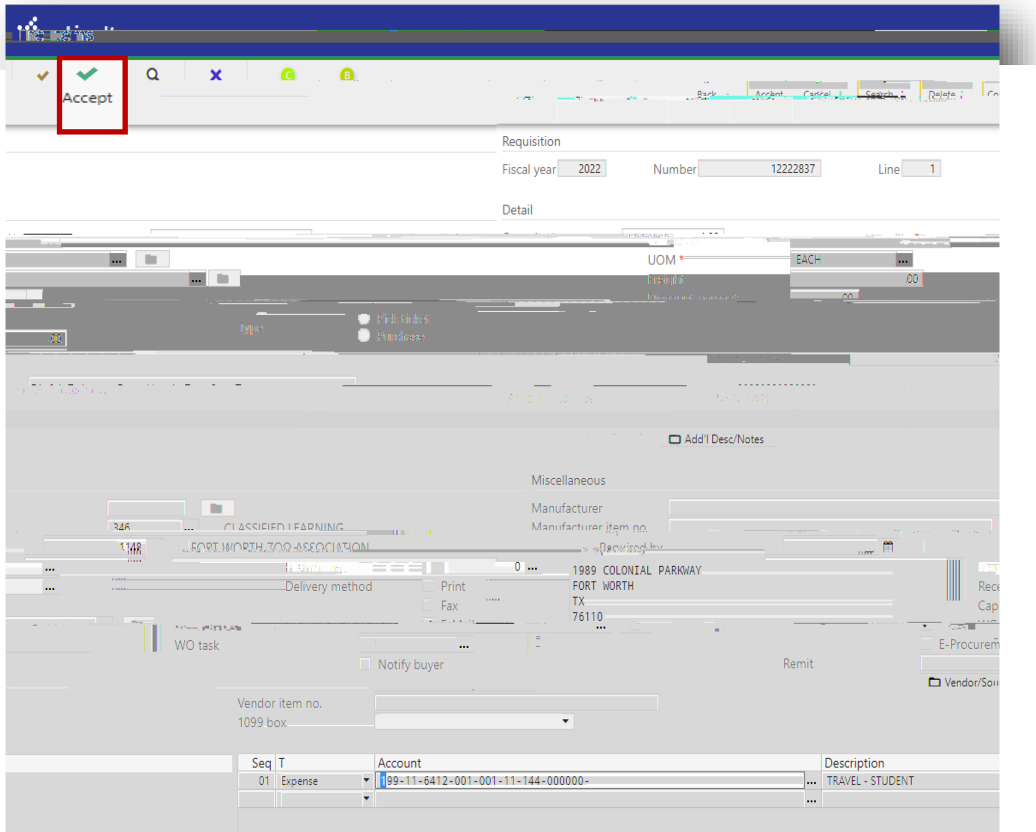
Click Accept.

Click Add to enter Line Item 2.

Once Item information has been entered, tab to the Account field and select "Copy GL" Account icon.

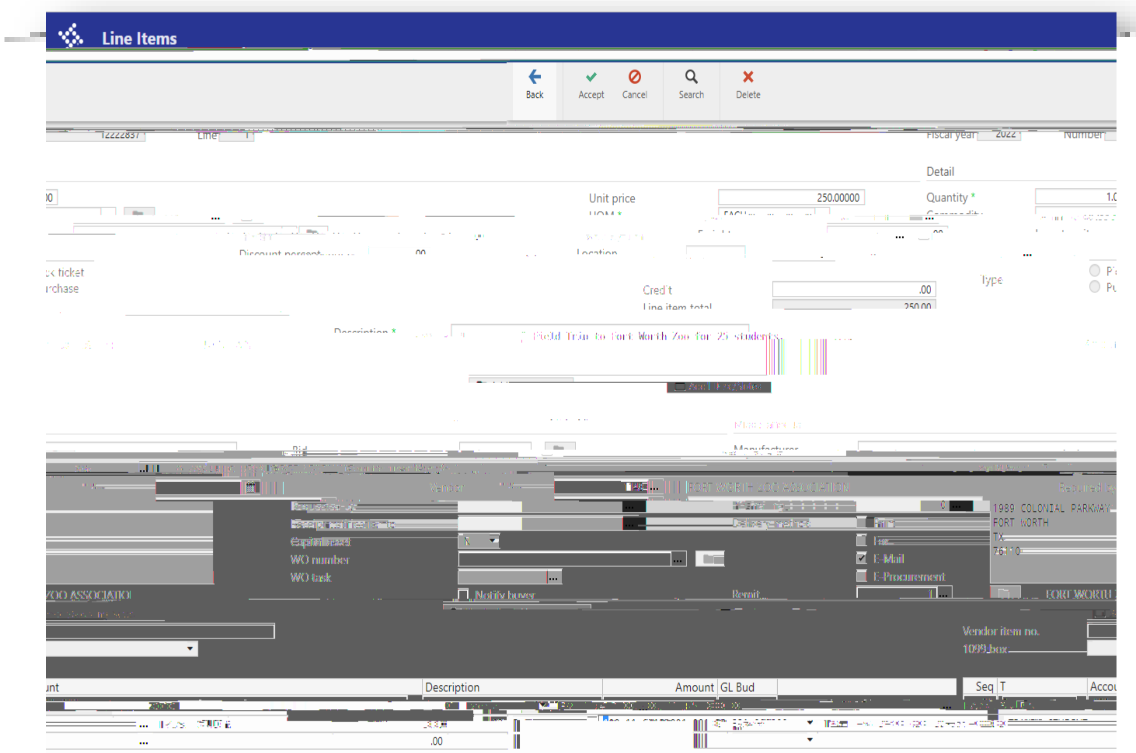
This will copy the GL account from line 1 to line 2.

Click Accept after the account populates.

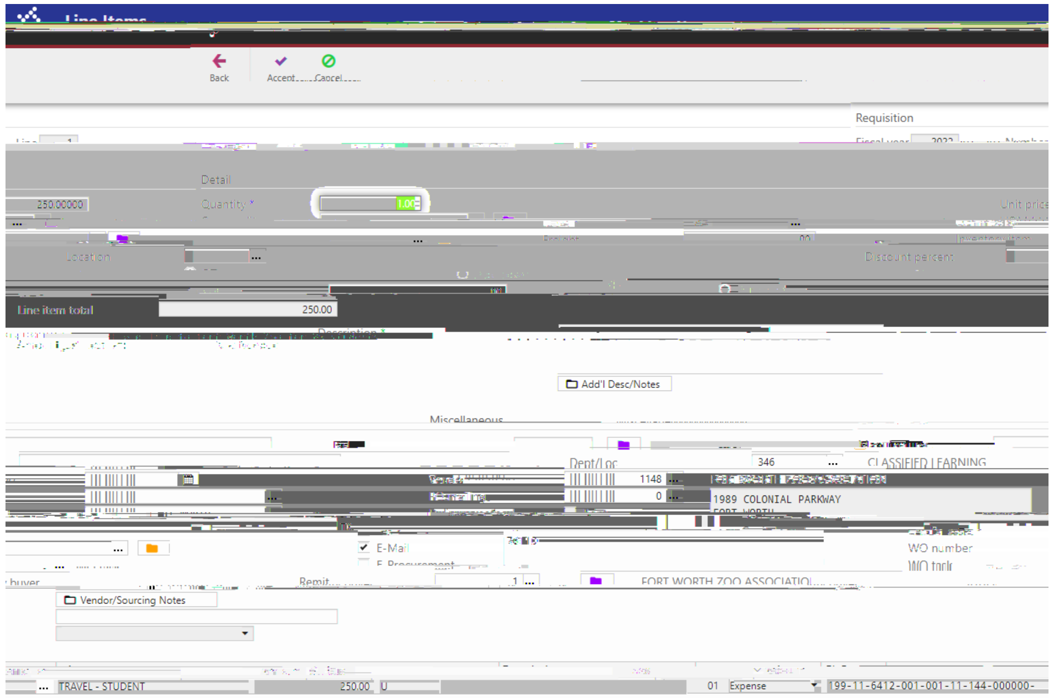


If multiple GL accounts are used for one line, enter the amount for the first line.

Munis will automatically copy the GL Account . Click on the budget code to type in a new one.



Once all line items have been entered with the appropriate GL account, click Accept and Back



The File Explorer window opens.

Locate and click on the file.

Click Open.

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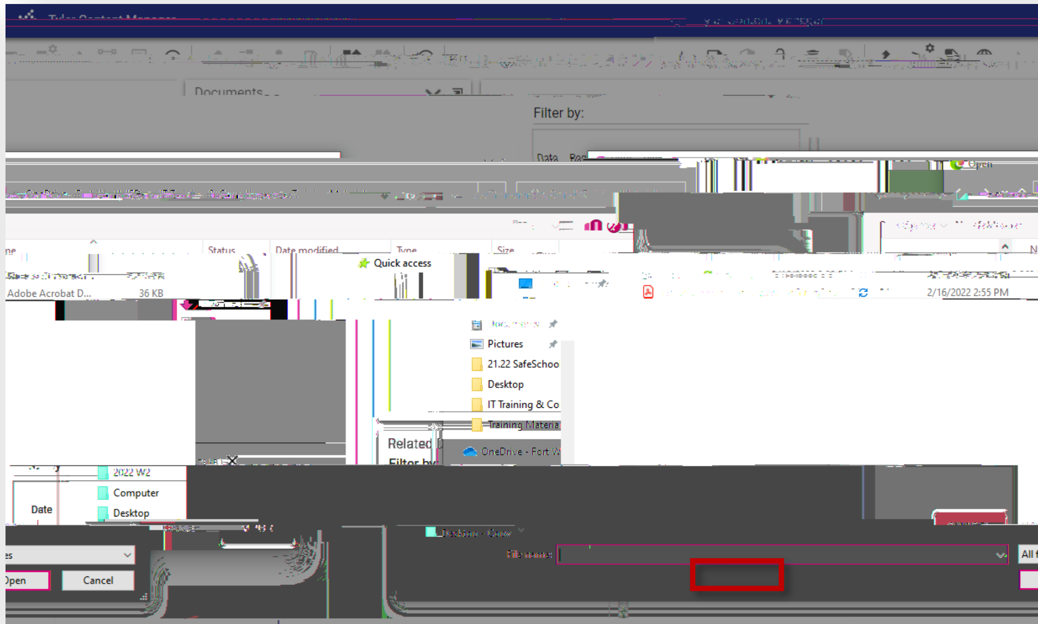
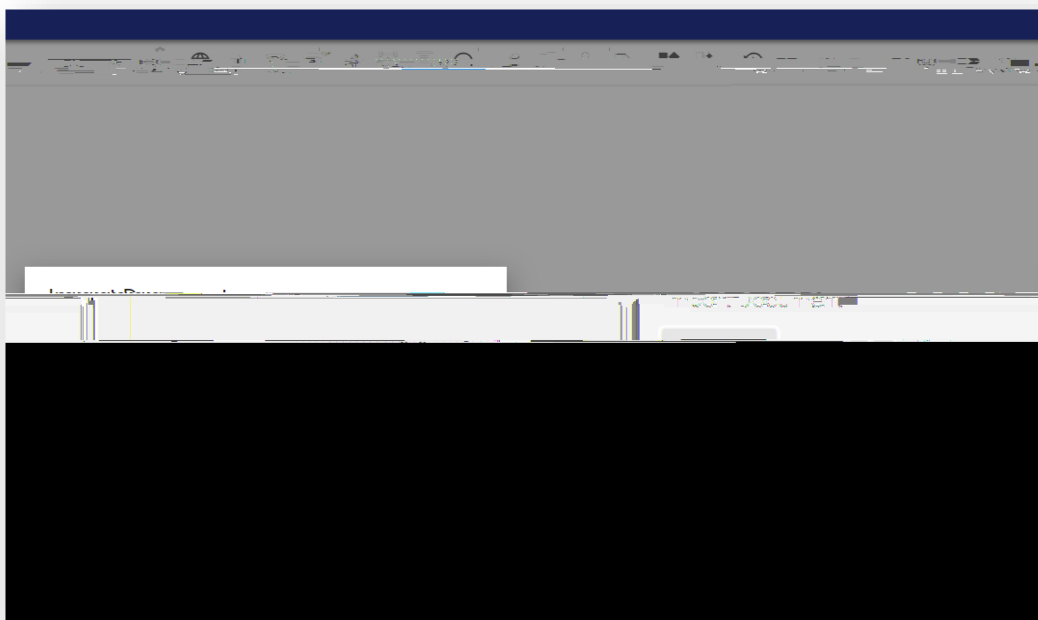
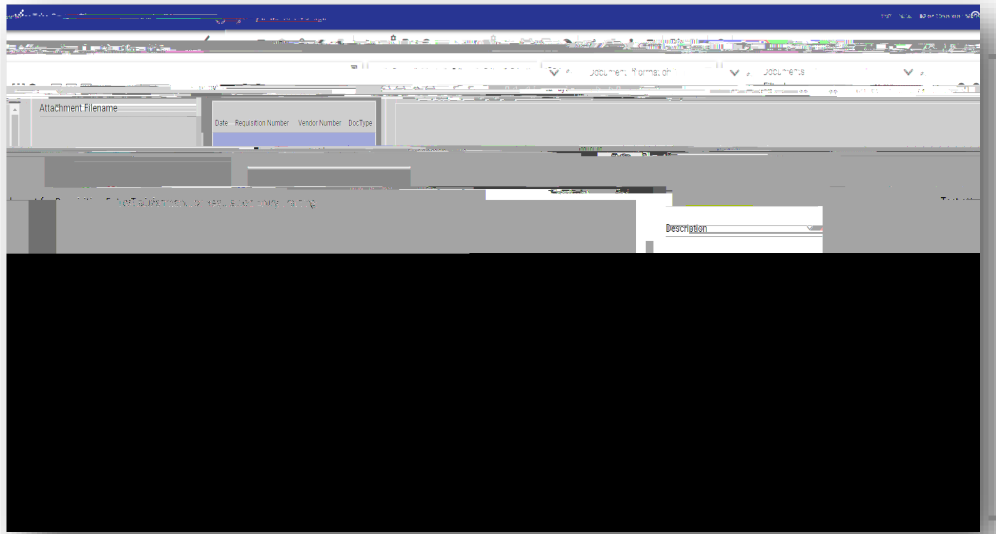


The uploaded filename will display in the Import Document window underneath the line.

Click Import.

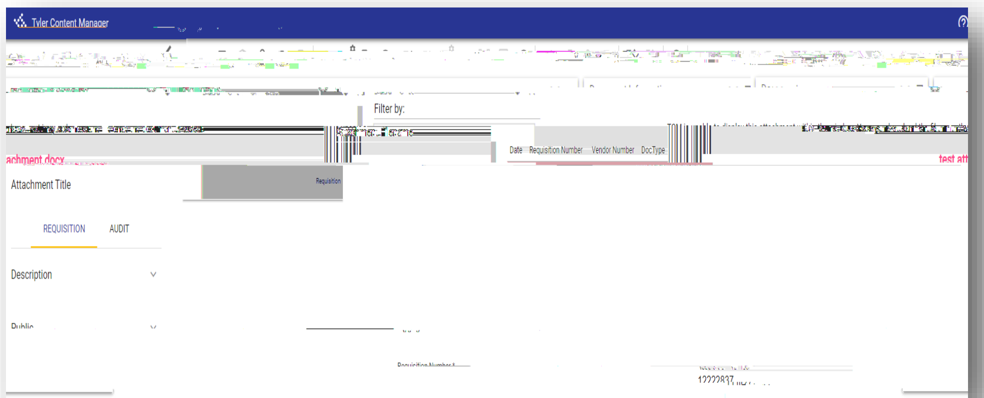


A PDF file displays with the items or quote information.



A WORD document or EXCEL spreadsheet file name displays in the center of the page.

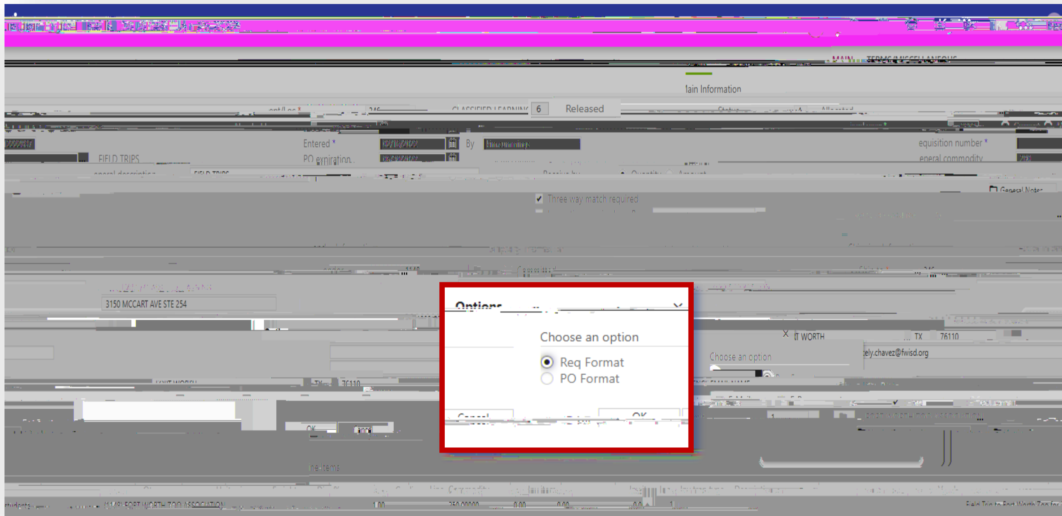
In order to view the file, click the download link in the middle of the window.



The Options window opens.

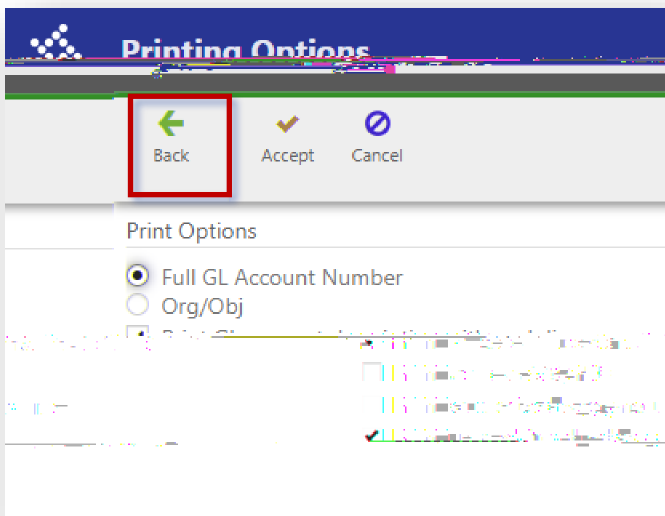
Choose Req Format

Click OK.



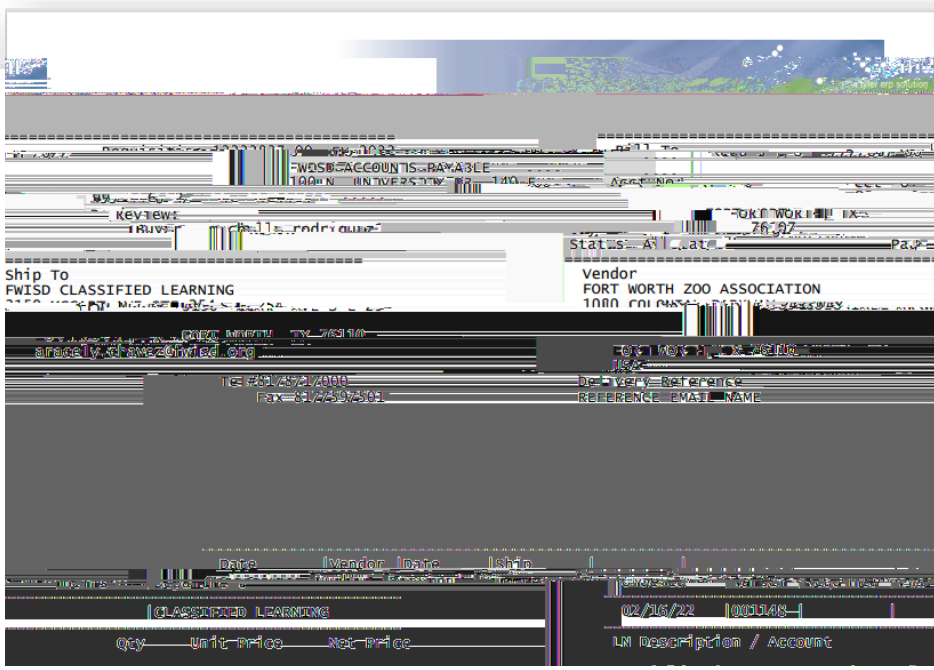
The Printing Options window opens.

Click Accept



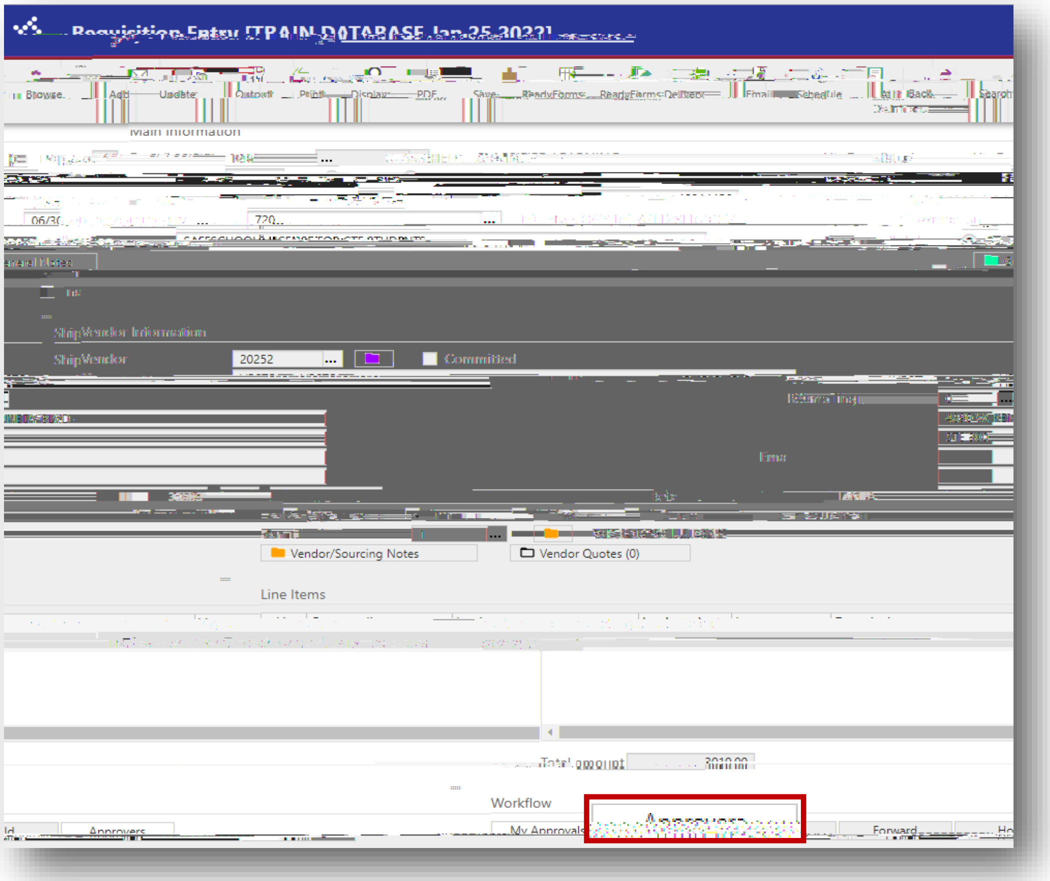
The PDF will open in another tab and can be saved.

DO NOT SEND PDF COPY TO THE VENDOR AS THIS IS NOT A PO.



Click on Approvers.

The Work Flow Status window opens.



Click Expand All.

A list of approvers will display.

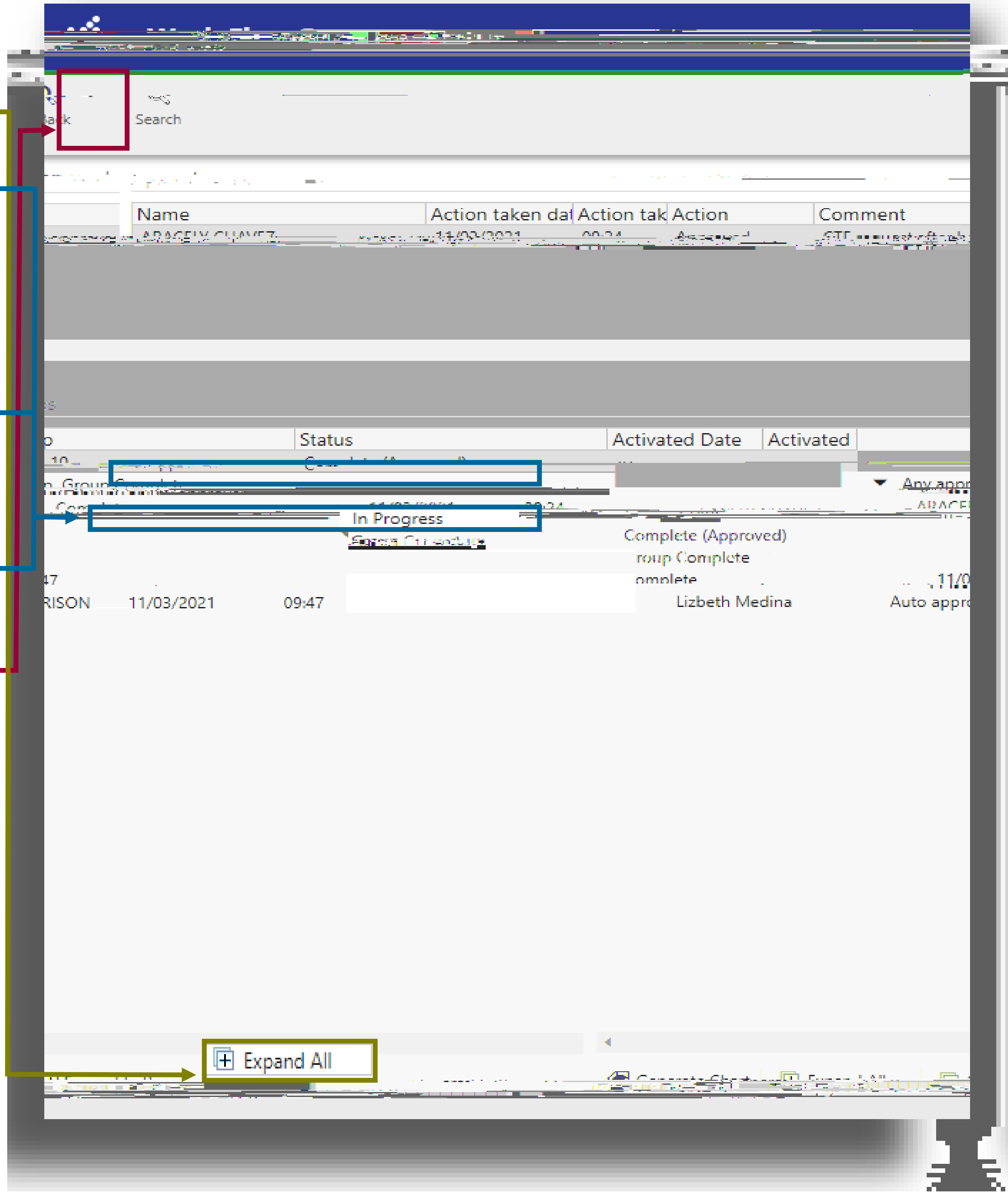
There are reqs that will have multiple approval levels as in the example.

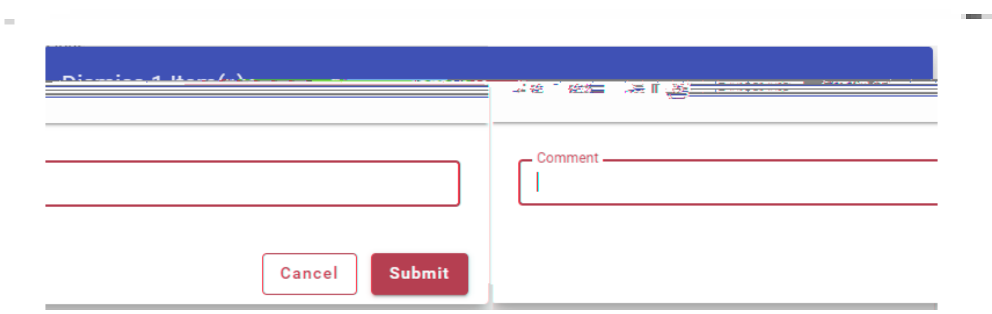
When the status is Group "Complete" to the right of the approver's name, that is an indication the approver has approved the req.

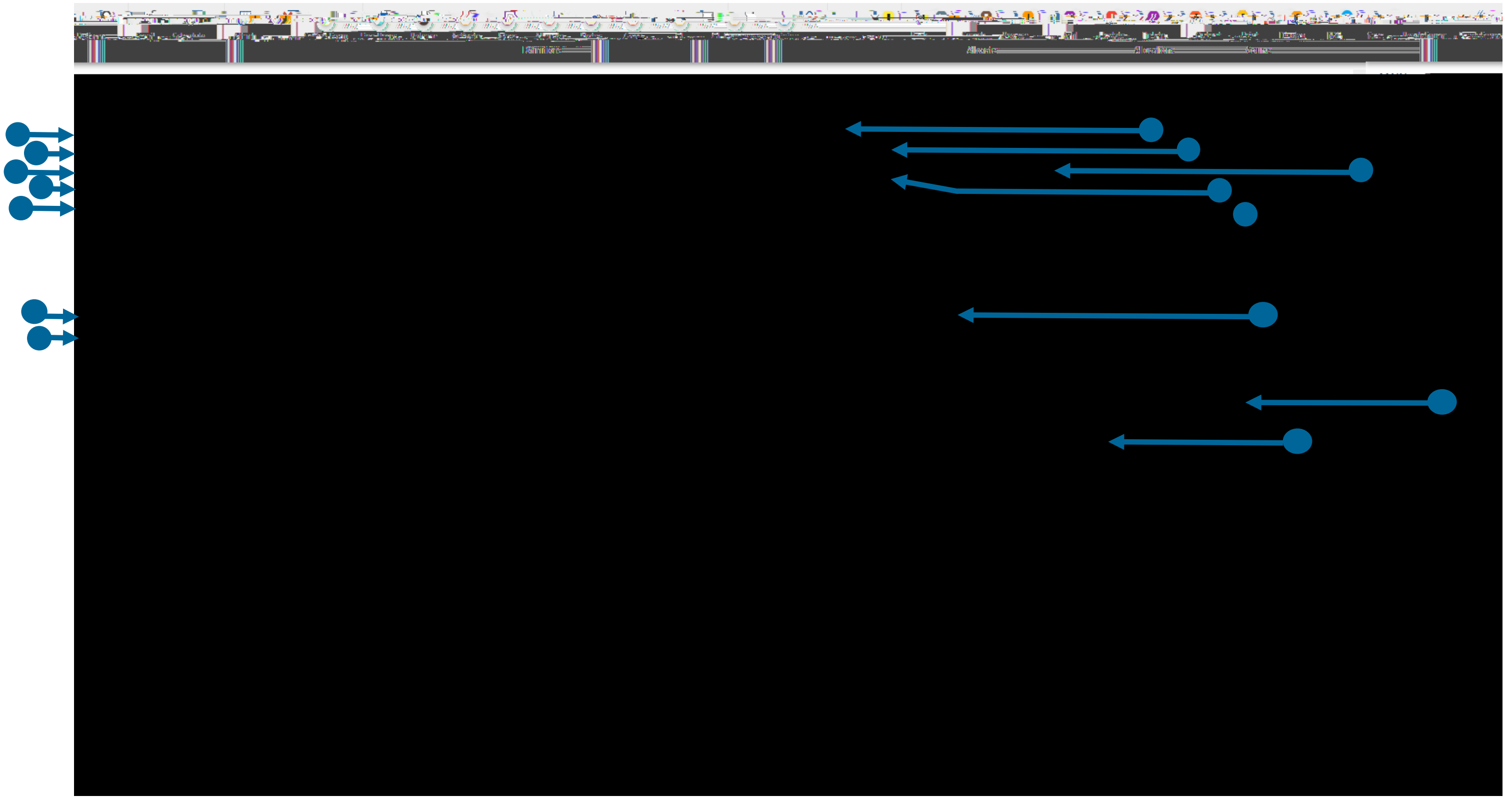
When the status displays "In Progress", the requisition is in that approver's queue.

Click on Back to close out of the Approvers window.

You are done!




Comment
Cancel
Submit



GLOSSARY

- – A general grouping category assigned to each employee, it is assigned based on work department/location.
- – An organization's financial year. A fiscal year may or may not coincide with the calendar year.
- – A number automatically assigned for the requisition.
- – A code that gives a general description; it standardizes information regarding purchased items.
- – A short description of the commodity, it will automatically populate based on the general commodity.
- – The value that explains where you are in the requisition process, it ranges from Converted (0) to Approved (8).

  2 - Created: Requisition is in the creation process.

  4 - Allocated: Budget number has been entered and accepted.

  6 - Released: Requisition is released - still in the queue of the budget owner, i.e., principal or director.

  8 - Approved: Requisition has been approved by supervisor and pending Purchasing for final approval and PO creation.

  0 - Converted: The requisition has been converted into a PO. 1 - Rejected: Requisition has been rejected, check notes for corrections.
- – A date set for when the requisition needs to be completed. This field is not required. It is for rush items, but not necessarily honored, it is a suggested field for the vendor.
- – The date that the requisition is created.
- – The user creating the requisition.

- – A person or company with whom business is transacted.
- – The vendor's name; will automatically populate when pressing the tab button after entering the vendor number.

- – The department/location connected to the username entering the requisition.
- – The email of the person submitting the requisition.
- – The email address of the person who can answer questions regarding the purchase.