



Contents

Requisition Approval.....	3
Objective	3
Overview	3
Procedure.....	4
The View Details option	5
○ Approve.....	6
○ Reject	6
○ Forward	7
○ Hold	7
Forwarding All Transactions to another approver	8

Requisition Approval

Objective

This document provides instruction for approving released requisitions. It is intended for personnel responsible for approving requisitions.

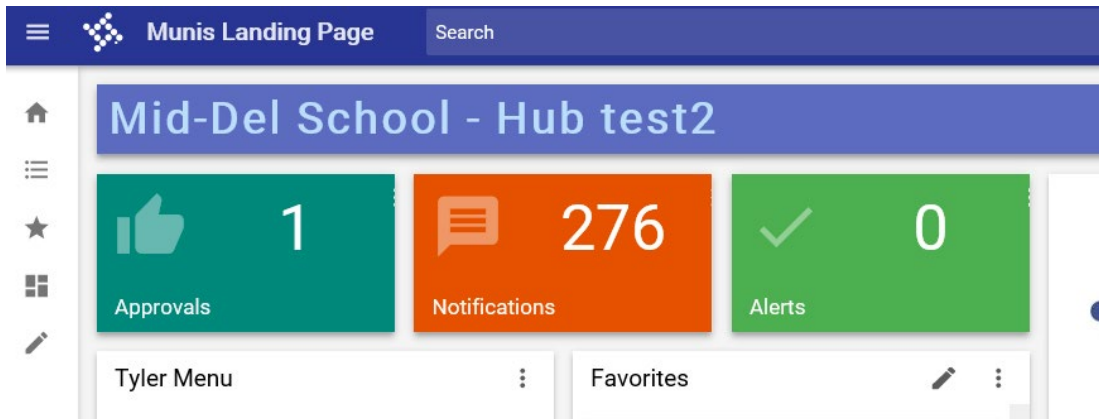
Overview

The Workflow Detail Web part, in conjunction with the Workflow business rules, establishes an electronic approval process for requisitions. When a requisition is released in Munis, the requisition is submitted to an approval process. The requisition must be approved by all necessary approvers in order for it to be converted into a purchase order or contract. This document describes the approval process using the Tyler Dashboard Workflow Detail Web part.

Procedure

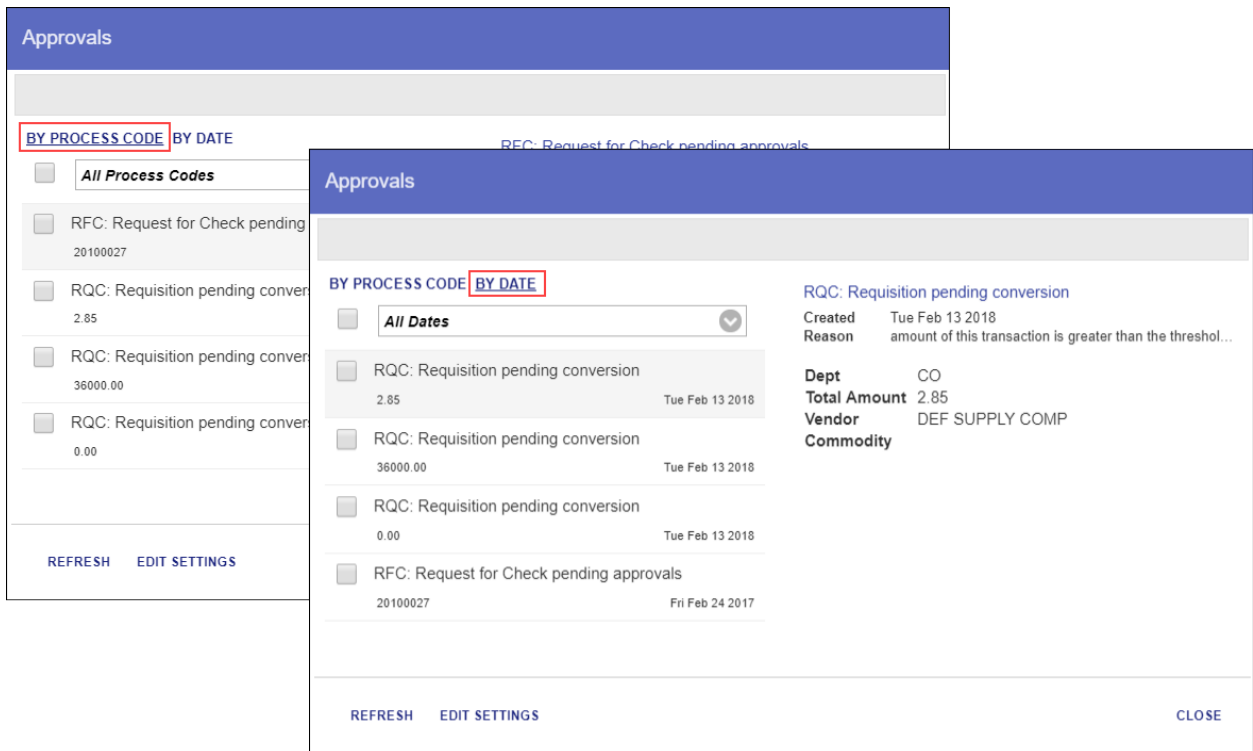
Munis Workflow transactions are approved using the Approvals card on Tyler Hub.

Note: If a subordinate tells you they released their transaction for your approval but you do not see any change in the Approvals image, click on Home or press F5 on your keyboard to refresh your screen and pull any items pending approval immediately into your screen.



To approve an item:

1. Double-click the Approvals card to list all items currently awaiting approval. Use the By Date or By Process Code options to sort the items.



2. Review the items awaiting approval.
3. To view additional information, click the Detail link to view the item in the applicable Munis program.

Approvals

BY PROCESS CODE BY DATE

☐ All Dates

Process Code	Amount	Date
RQC: Requisition pending conversion	2.85	Tue Feb 13 2018
RQC: Requisition pending conversion	36000.00	Tue Feb 13 2018
RQC: Requisition pending conversion	0.00	Tue Feb 13 2018
RFC: Request for Check pending approvals	20100027	Fri Feb 24 2017

REFRESH EDIT SETTINGS

RQC: Requisition pending conversion

Created: Tue Feb 13 2018
Reason: amount of this transaction is greater than the threshol...

Requisitions

Requisition: 2017/20100109
Allocated, Dan Olson, 02/13/2018 Total Cost: \$2.85

Requisition

Vendor Quotes (0) General Notes (0)

Fiscal Year* 2017 Requisition Number* 20100109 Created Date* 02/13/2018

Type (N) NORMAL

Convert to Purchase Order

Department* (CC) CENTRAL OFFICE View

Commodity View

Description Copper wire

Buyer (grantjewett) Grant Jewett

Purchase order

Review

Needed by

Notification Threshold % 0.00

Project Accounts Applied

Notify Originator When Converted or Rejected

Notify Originator of Overages

Receive by Amount

☒ Three Way Match Required

Inspection Required

Items (1)

Delete	Line	Description	Qty	UOM	Unit Price	Line Total	GL Account	Bid Item
<input checked="" type="checkbox"/>	1	Copper wire, 3AWG, THHN, Stranded copper, 600V, BI	6.00	FEET	\$0.50000	\$2.85	E () TECHNOLOGY HARDWARE	<input type="checkbox"/>

Save Cancel

The View Details option

Once you click on the blue link, you are able to view more details for the item within the Web part and provide a very simple overview of the transaction.

Mid Del Schools prefers that you use this option, which allows you to view the item in the associated Munis program.

1. The program opens the Requisition Entry program, with the selected requisition as the active record.

Requisition Entry - Munis

MAIN TERMS/MISCELLANEOUS USER DEFINED

Main Information

Dept/Loc * CO ... CENTRAL OFFICE

Fiscal year * 2018 ☐ Current ☒ Next

Requisition number * 20100042

General commodity ...

General description GREASE GUN, LEVER ACTION

Status 6 Released

Needed by

Entered * 02/28/2018 By dan.olson

Convert to Purchase Order

PO expiration

Receive by ☐ Quantity ☐ Amount

☒ Three way match required

☐ Inspection required By

☐ Project accounts applied

Vendor Information

Vendor 1034 ... ☐ Committed

Name DIRECT SUPPLY

PO mailing 0 ...

6767 NORTH INDUSTRIAL ROAD

MILWAUKEE WI 53223

Delivery method ☒ Print ☐ Fax ☐ E-Mail ☐ E-Procurement

Remit 0 ...

Shipping Information

Ship to * CO ...

3202 EAST 42ND STREET

FALMOUTH ME 04105

Email

Reference


Line Items

Line	Item Number	Commodity	Description	Vendor	Qty
1	5		GREASE GUN, LEVER ACTION	(1034) DIRECT SUPPLY	1.00

Total amount 99.00

Workflow

1 of 1

2. Review the requisition, paying careful attention to details included in the General Notes. (If vendor quotes are associated with the requisition, it can be found in TCM by clicking  .) To view the line detail for each line item, select Line Items in the menu ribbon.

3. From this screen, you have 4 choices:

- **Approve**. This approves the requisition as recommended and forwards to the next approver. When all approvers have approved, Purchasing personnel are notified.
- **Reject** using the buttons on the bottom of the screen. If you reject the requisition, you must enter a comment or reason why. Please be as explanatory as possible, instructing the originator on how to correct the requisition or asking them to delete it.

Change the status of the requisition to Rejected. Munis requires that you add a comment for your action. When you click OK to save your comment and reject the

requisition, the program notifies Purchasing personnel of the rejection and the reason.

The status of rejected requisitions is changed from 6–Released to 1–Rejected. The status of approved requisitions remains at 6–Released until the approval of the final step in the approval process. At that time, the status changes to 8–Approved. Requisitions with a status of 8–Approved are eligible for conversion to purchase orders. Rejected requisitions may be corrected by the originators, and resubmitted to the approval process.

- **Forward** to another approver. The program prompts you to provide a comment for your action. To complete the forward, select the Workflow approver from the list and then provide a comment in Comment box. When you click OK to save the forwarding information, the program forwards the requisition to the new approver.
- **Hold** for future review. If you hold the requisition, you must enter a comment or reason why. Please note that requisitions in a status of hold are still reserving the monies on the requisition and these monies cannot be used elsewhere. A status of Hold allows you to keep the requisition in your approval queue. A comment is required for this action. To place a requisition on hold, enter a comment and then click OK to hold the approval process.
The held requisition will remain in the Workflow Requisition Approval folder until action is taken.

Workflow

My Approvals	Approve	Reject	Forward	Hold	Approvers
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4. When you have completed the requisition review, close the Requisition Entry program and return to the Tyler Hub.
5. Repeat these steps until all items have been reviewed and appropriate action taken.

Forwarding All Transactions to another approver

If you will be unable to approve transactions for one or more days, you can globally forward all transactions to another approver.

1. To turn forwarding on, click on Settings on the Workflow Approvals.

Workflow Approvals

You are currently receiving forwarded work from (fcantrell - (fcantrell - Felicia Cantrell)).

All Process Codes

All Dates

SELECT ALL

REFRESH

(0/1)

<input type="checkbox"/> <div> <div>REQ: Requisitions pending approvals</div> <div>\$50.00 - Books</div> <div>11/15/2019</div> </div>	<div>REQ: Requisitions pending approvals</div> <div>Created</div> <div>Fri Nov 15 2019</div> <div>Reason</div> <div>G/L segment code matches business rule criteria</div> <div>Requisition Header</div> <div>Fiscal year:</div> <div>2020</div> <div>Requisition number:</div> <div>12000075</div> <div>General description:</div> <div>Books</div> <div>Contract:</div> <div>Total amount:</div> <div>\$50.00</div>
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CLOSE

SETTINGS

Approvals Settings

kduckworth - Kellie L. Duckworth is not currently forwarding any work.

Process Code Restriction

Workflow Card Title
Approvals

Forwarding

Forward all Workflow to user

Approver

Selective Forwarding

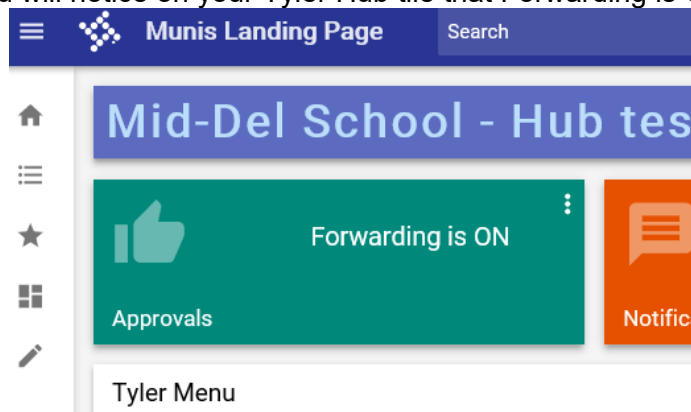
PMN Personnel Actions New Hire	Approver
PMO Personnel Actions Other	Approver
PMS Personnel Actions Salary	Approver
PMT Personnel Actions Terminate	Approver

Schedule Forwarding

	Start Date	Hour	Minute	AM/PM		End Date	Hour	Minute	AM/PM
	12	00	AM			12	00	AM	

RESET FORWARDING
MY WORK MOBILE
CANCEL
SAVE

- On Approval Settings you are able to select whom you would like to forward all of your approvals.
 - You can also use Selective and Schedule Forwarding for your approvals.
- You will notice on your Tyler Hub tile that Forwarding is On



Turn off Forwarding by clicking on Reset Forwarding.

The screenshot shows the 'Approvals Settings' page. A modal dialog box titled 'Reset Forwarding Settings' is displayed, asking 'Are you sure want to reset your Workflow Forwarding Settings?'. It has 'CANCEL' and 'CONTINUE' buttons. The 'CONTINUE' button is highlighted with a red box. Below the dialog, the 'Forwarding' section is visible, showing 'Forward all Workflow to user' set to 'Jacqueline Woodard'. The 'Selective Forwarding' section lists four categories: PMN (Personnel Actions New Hire), PMO (Personnel Actions Other), PMS (Personnel Actions Salary), and PMT (Personnel Actions Terminate), each with an 'Approver' dropdown. The 'Schedule Forwarding' section shows 'Start Date' and 'End Date' both set to 12:00 AM. At the bottom, the 'RESET FORWARDING' button is highlighted with a red box and a red arrow points to it. Other buttons at the bottom include 'MY WORK MOBILE', 'CANCEL', and 'SAVE'.

Click Save

RESET FORWARDING MY WORK MOBILE

CANCEL SAVE