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TEACHING GUIDE AND REFERENCE MANUAL

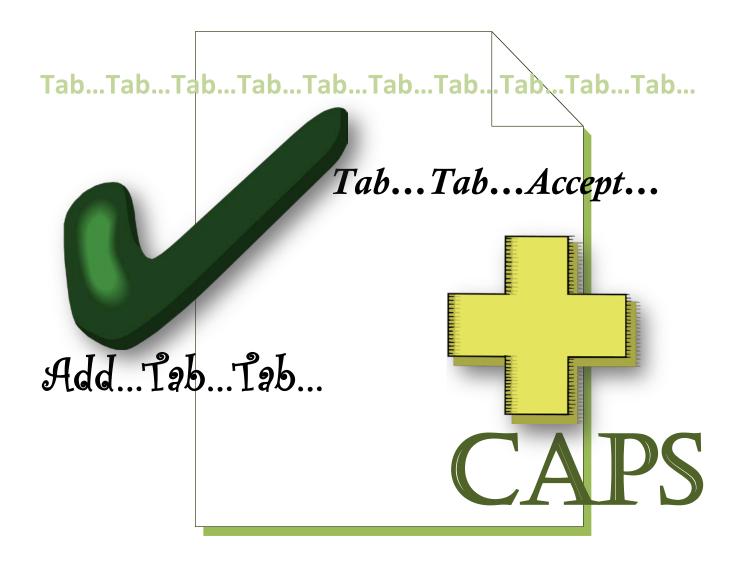


TABLE OF CONTENTS

SECTION 1 - ADDITIONAL INFORMATION

MUNIS® KEYBOARD SHORTCUTS	PG. 1
MUNIS® COMMON TOOLBAR TASKS	PG. 2
MUNIS® SEARCH	PG. 3-7
FIND	PG. 3
WILDCARD CHARACTERS	PG. 3-4
BROWSE AND FILTER	PG. 5-6
QUERY WIZZARD	PG. 6-7
MANAGING SELECTED RECORDS	PG. 7
MUNIS® ATTACH	PG. 8-9
ATTACH, REMOVE, VIEW	PG. 9
PARKWAY ATTACHMENT REQUIREMENTS	PG. 10
MUNIS® COMMON REPORT TASKS	PG. 11-12
MUNIS® PRINT	PG. 12-14
MUNIS® NOTES	PG. 14-16
MUNIS® WORKFLOW	PG. 17-19
WORKFLOW STATUS KEY	PG. 18
SECRETARY/ORIGINATOR NOTIFICATIONS	PG. 18-19
ADMINISTRATOR/APROVOR NOTIFICATIONS	PG. 20

SECTION 2C - REQUISITION APPROVAL

OVERVIEW	
MY WORK DETAIL ACTIVATION	PG. 2
WORKFLOW NOTIFICATION SET-UP	PG. 2
MY WORK DETAIL NOTIFICATION SETTINGS	PG. 3
MY WORK DETAIL APPROVAL NOTIFICATIONS	PG. 3
MY WORK DETAIL "TURN FORWARDING ON"	PG. 4-5
"TURN FORWARDING OFF"	PG. 5
TYLER MENU - REQUISITION APPROVAL, REJECTION, HOLD	PG 6-10
REQUISITION APPROVAL ENTRY PATH	PG. 6-7
STEP - BY - STEP INSTRUCTIONS	PG 8-10
REJECTED REQUISIOTN NOTES	PG. 11
VIEW NOTES	PG. 12-13
VIEW ATTACHMENTS	PG. 14
"MY WORK DETAIL" - REQUISITION APPROVAL, REJECTION, HOLD	PG. 15-22
STEP - BY - STEP INSTRUCTIONS	PG. 19-22

SECTION 4 - PURCHASE ORDER INQUIRY

PURCHASE ORDER INQUIRY

PG. 1-14

SECTION 5 - VENDOR INQUIRY	
VENDOR INQUIRY INVOICE INQUIRY CHECKS INQUIRY VIEW CHECK	PG. 1-18 PG. 3-7 PG. 7-11 PG. 11-14
SECTION 6 - BUDGET, REPORTS, APPR	ROVAL
BUDGET ENTRY AND REPORTS BUDGET ENTRY PROCESS NEW USER - UNLOCKING BUDGET REPORTS CREATING A BUDGET DETAIL REPORT CREATING A BUDGET WORKSHEET BUDGET APPROVAL	PG. 1-16 PG. 1 PG. 9 PG. 12 PG 16 PG 20 - 31
SECTION 7 - GL INQUIRY	
GENERAL LEDGER - GL JOURNAL ENTRY JOURNAL ENTRY ATTACHMENTS AND CHANGES GENERAL LEDGER - GL INQUIRY / PRINT	PG. 1-9 PG. 7-9 PG. 1-3
SECTION 8 - REPORTS	
GL ACCOUNT INQUIRY VIEWING THE DATA GL REPORTS	PG. 1-13 PG. 5
YEAR TO DATE BUDGET REPORTS DETAIL/SUMMARY OPEN PO BY GL - OUTSTANDING ENCUMBRANCE	PG. 1-12 PG. 1-11

MUNIS® REQUISITION APPROVAL Section 2C

- All released requisitions must be processed through the Requisition Approval program before they can be converted to purchase orders.
- MUNIS® Workflow the approval process automatically routes the requisition to the appropriate approval levels.
- When you access the program, the program displays all released requisitions (status 6-Released) with your user ID.
- If there are no requisitions to approve, the program displays the following message: "There are no requisitions waiting for your approval".
- If you have an entry in the Over Budget Approver box in Department Code FM, any requisitions that cause the account to be over budget are flagged so that only the user ID entered in Over Budget Approver can approve the over budget requisition.
- Requisitions associated with contracts that have an existing change order are included in the requisition approval list.
 - If the requisition is rejected, the change order open requisition amount is updated along with the original contract record.
- "Approved" requisitions create records in an approval table that records the history of who approved the requisition.
- *"Rejected"* requisitions can be reopened, modified, and resubmitted.
 - The workflow notification includes the name of any person who rejected the requisition.
- "Held" requisitions keep the requisition open so that it may be considered at a later date.
- Records can also be viewed in the Purchase Order Audit Report.
- Associated notes can be viewed for specific requisitions.
- Associated attachments can be viewed for specific requisitions.

MY WORK DETAIL ACTIVATION

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6. Click the "Home" icon to refresh the	
page	. △
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New PW 3. To begin - enter "password" in the Password Field To Reset - click the "Reset Work Flow Password box	
Confirm To Continue - enter new password in the "New PW" field To Confirm - re-enter your new password in the "Confirm" field	
Run Tvler Programs As	
Thin Client Program (GDC) - Power Users	
Web Version Program (GWC)	
5. Click OK - to save changes	
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WORKFLOW NOTIFICATION SET-UP - TAB BETWEEN FIELDS

- 1. Click the User My Profile icon on the Tyler Dashboard (the "Man" icon)
 - This action will set up your notification/approval screens.
 - This will only need to be repeated to change your password.
- 2. Your Network ID will automatically populate
- 3. Password
 - To Begin enter "*password*" in the password field
 - To Reset click reset in the "Reset Work Flow Password" box
 - To Continue enter your new password in the "New PW" field
 - To Confirm re-enter your new password in the "Confirm" field
- 4. Thin Client Program (GDC) Power Users
 - Automatically selected DO NOT change
- 5. Click OK to save change
- 6. Click the "HOME" icon to refresh the page and return to the Tyler Dashboard screen

MY WORK DETAIL NOTIFICATION SETTINGS

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- Click the Gear/Cog Icon in the "My Work Detail" Group to set your approval/notification settings.
 - This action will set up the intervals for your approval/notification updates.
- Select the amount of time for the system to update your notifications.
- Click Apply.
- Click OK to close the "Auto Update Interval" screen.
 - This will only need to be repeated to change your settings.

MY WORK DETAIL APPROVAL NOTIFICATIONS

My Work Detail												
	rovals											Update
	Category Requisitions p						_			al Items 1 Item		
	Requisitions p	pending	approvais							1 Item		
8	Created		DEPT	TOTAL AMT	VENDOR	DESC	TYPE		Additional Info	Viewer	Action	Action
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- Approvers will receive messages in your Workflow Assistant Inbox located on your dashboard in "My Work Detail".
 - The APPROVALS icon will be highlighted indicating that there are requisitions in your queue that require your attention and if there has been a change to a Requisition and your approval is needed.
 - The **NOTIFICATIONS** icon will be highlighted indicating that there is a message in your queue but, does not require your attention.
 - To remove items from you notifications queue
 - 1. Click Viewer to view notification
 - 2. Click Action/Update to delete notification from queue
 - The **ALERTS** icon is not active.

MY WORK DETAIL "TURN FORWARDING ON" link

- Allows the approver (when unavailable to do approvals) to forward pending requisitions at their level to another designated approver for approval.
- The MUNIS Approval Program provides an audit trail for all approvers.

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Collapse the field on the left side to view full screen.

Click on the "Turn Forwarding ON" link to open the selection window.

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Click on the arrow in the "Forward To" field to open the drop down list. Approver Options – Choose alternate approver

Forward To:	Choose name of alternate approver from list
Pre Approver:	DO NOT USE

Click OK

- You will receive a confirmation message stating that you are forwarding work to another approver and you cannot receive pending actions while you are forwarding.
- The link will change to "Turn Forwarding OFF"

My Favorites Requisition Entry <u>Tile View Add Link</u>	▽ 🗶 🖉
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To reverse and restore your original settings - click on the "Turn Forwarding OFF" link

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- The "Forwarding" window will open
 It will state that your "Forwarding" is currently ON
 "Turn Forwarding OFF" will be selected
 Click OK to turn your "Forwarding" OFF
 Your approval capability and notifications will be restored and the link will default to "Turn Forwarding ON"

REQUISITION APPROVAL, REJECTION, HOLD

MUNIS® Requisition Approvals can be accomplished in both the <u>TYLER MENU</u> and <u>MY WORK DETAIL</u> groups.

TYLER MENU

- Displays a list of requisitions in your queue for approval.
- Allows you to sort requisitions by requisition number or vendor, approve by department/location, approve for others and comment on the status of the approval.
- Allows the approver to Approve ALL requisitions at one time or select individual requisitions to Approve, Hold or Reject.
- Also allows approvers to view details pertaining to individual requisitions, along with attachments, and associated notes.
- Requisitions can also be approved, on an individual basis, through the Workflow group located on the Requisition Entry Header screen.

MUNIS® "TYLER MENU" REQUISITION APPROVAL PATH

■ Dept→ *Requisition Approval*

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Click on Dept in the Tyler Menu located on the Tyler Dashboard.

Click on Requisition Approvals.

"TYLER MENU" APPROVAL SCREEN

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	MUNIS (rqapprov)	
	There are no requisitions waiting for your approval.	
	OK	
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If there are no items in your queue for approval, a window will open notifying you that you have no approvals at this time – Click OK

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- If there *are* items in your queue for approval they will be listed.
- You can select to Sort by Vendor or Requisition Number, Approve for Others (if you have the correct permissions), Approve by Department, enter Approval Comments (if you have the correct permissions), and select Approve All to place the program in update mode and change the default approval status to A-Approved for all pending requisitions.

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"TYLER MENU" APPROVA	L – tab between fields – use CAPS
Sort	to select to sort requisitions by requisition number or vendor
	1. click Sort to open the MUNIS (rqapprov) window
	2. select Requisition number or Vendor to sort the requisitions in you queue
Approve Others	to select to approve for another approver - enter the
	 approvers user ID this button is accessible only if you have the necessary
	permissions
	 if you normally cannot access other's requisitions, this option only finds requisitions under your user ID for the department you selected
	1. click Approve Others to open the User ID window
	2. enter their User ID
	3. click OK
Approve Department	 to select to approve by department – enter the department or location code if you normally cannot access other's departments/locations, this option only finds requisitions under your user ID for the department you selected
	1. click Approve Dept to open the Requisition approval window
	2. enter the Department/Location code
	3. click OK
	 you will be notified if there are no requisitions waiting for your approval with that Department/Location code
	5. otherwise, the requisitions waiting your approval will be listed

Approval Comments	select Approval Comments to confirm that you have permission to enter approval comments			
	 when you click Approval Comments, the permissions display in the status bar at the bottom of the screen 			
	 if you do not have permission, the display states: ✓ "You may not enter comments for approvals." 			
Approve All	select Approve All to automatically place the program in update mode and change the default approval status to A-Approved for all pending requisitions			
	1. click the View Requisitions button, located on the left side of the screen to view the details, associated notes and attachments for individual requisitions in your queue			
	 must be viewed before the final decision to approve 			
	 to view all requisition in your queue one at a time, use the arrows on the Navigation Bar (located below the Workflow Group) to scroll through the current list 			

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may enter comments for approvals.					-		e
Approve All Continued	code field	or R-R	ejected by	, clicki	ng ir		

keeps the requisition open so that it may be considered at a later date. If you type H (Hold) in the Code box

- the cursor moves to the Hold/Rejection Comment box
- You must type a reason for the hold status if you leave the Code box blank
 the program processes the requisition as if it were on
- the program processes the requisition as if it were on hold

R-Rejected
 rejected requisitions can be reopened, modified, and resubmitted when rejected, the Standard Notes window opens prompting a comment Note: You must add comments if you reject a requisition SEE BELOW FOR ENTERING NOTES FOR REJECTED REQUISITIONS
 4. some reasons for rejection might be: does not meet Parkway Procurement Guidelines incorrect account code please to include Bid # cannot make this purchase at this time incorrect vendor chosen did not include attachment did not include reference field name and phone number please use CAPS for requisition entry information did not choose commodity code did not choose correct commodity code requisition entered in incorrect fiscal year originator requested that requisition be rejected or returned please include further detailed description for items being ordered incorrect fields used – ie. freight, discount, credit please include board approval date and length of agreement etc.

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REJECTED REQUISITION NOTES	S – use CAPS				
Approval Notes For Rejected Requisitions	1. DO NOT USE IMPORTED NOTES IN THIS FIELD				
	2. the Standard Notes option allows you to include notes explaining the requisition REJECTED classification				
	 Note: You must add comments in this field if you reject a requisition 				
	3. click 🖪 Add to enter new text – USE CAPS				
	 you can enter up to 999 lines of text 				
	 comments added in requisition approvals can be viewed in requisition entry by clicking the Notes (located on the left side of the screen in the Program Options group) 				
	 click Accept to return to the requisition approval screen 				

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View Notes Continued	3. to view associated notes for specific requisitions click on View Requisitions on the Requisition Approval screen
	 this action will open individual requisitions

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View Notes Continued	 click Notes (located on the left side of the screen in the Program Options group) to display a list of <u>ALL</u> notes associated with the current requisition
	 the program displays a list of existing General, Rejection and Hold notes
	 this Notes field is for display only; you cannot add or update notes in this field
	5. to display the text associated with a specific note, double-click the list entry
	6. FILE/EXIT to return to the list of notes
	7. FILE/EXIT to return to the Requisition File Maintenance screen

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Notes	Click on the attachment to		- Either Double Click with the mouse -or-
Copy	open - a blue bar will highlight		-or- Press "Enter" on the Keyboard
GL Allocations	the selected attachment - then Click Accept		To add a document:
			- Choose "Add" from the Toolbar
GL Summary			- Pick the document to attach
Project Summary			- Type in a description
Training Course			To delete a document:
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	Convert to PO		
	I 3 of 5 ▶ ▶ ▶ ▶ ▲ E Attachments (1)		~
			OVR

View Attachments	1. to view associated attachments for a specific requisition click Attachments located adjacent to the Navigation Bar
	 the number of attachments, if any, for a specific requisition will be indicated
	2. the Requisitions Attachments screen will open with a list of attachments associated with the current requisition
	3. to display the text associated with the attachment, double-click the list entry
	4. close attachment
	5. click Return to return to the Requisition File Maintenance screen
FILE/EXIT	to return to the Requisition Approval Screen

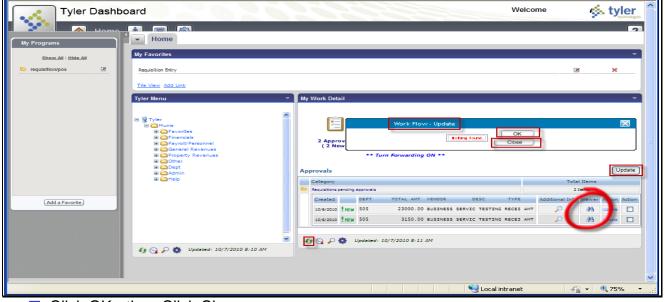
- The Requisition Approval, Hold and Rejection process can also be accomplished at this point through the Workflow Group located on the Requisition File Maintenance screen.
- Clicking the VIEW REQUISITIONS button opens the requisitions in your queue.
- Using the Navigation Bar, you can view all requisitions in your queue one at a time.
- The Workflow group contains buttons that allow a workflow approver to mimic the actions available in the Requisition Approvals Tyler Menu program.
- The Workflow group buttons are not accessible unless you are a workflow approver for the selected requisition.
- See pages 18-21 for detailed views and instructions.

■ MY WORK DETAIL - "DELAYED TIME" - REQUIRES UPDATING

- Displays the number of approvals in your queue for approval
- Displays Notifications, if any, at your approval level
- Lists all requisitions individually at your level to approve
- Allows approvers to view details pertaining to individual requisitions, along with attachments and associated notes.

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- Click refresh (circular green arrows) and clock to update the information in you queue
 - You will be notified of any new items at your level for your approval



Click OK - then Click Close

Click the Viewer Spyglass box to view selected requisition.

• The Requisition File Maintenance screen will open.

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	Detail		
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Notes	Commodity	UOM Each	
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	arrows to scroll		
	nal Line Detail r the selected		
re	quisition		
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Click Line Detail to view the details of individual requisitions.

 Use the arrows on the Navigation Bar to scroll for additional Line Detail items for the selected requisition

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	Requisition Maintenance			
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Line Detail	× X 🖻 🛍 🖻 🖊 🔚 🕞 D/ ×			
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Activate	2011 236 10/21/2010 APPROVAL 2011 194 10/12/2010 furniture an		100.00 Released	BUSINESS S BUSINESS S
	10 2011 194 10/12/2010 Tarricare an 10 2011 101 09/21/2010 tennis balls		555.00 Released	SPORTS HER
Allocate	2011 90 09/14/2010 PING PONG		100.00 Released	SPORTSWORL
Notes	2011 46 10/12/2010 MOUSEPADS	5	450.00 Released	STAPLES
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	My Approvals Approve Rej	ect Forward Ho	old Approvers	
	Conversion			
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- Or click 📕 Browse to view a list of all requisitions in your queue for approval
- Click on the requisition you want open- a blue bar will highlight your selection
- Click ACCEPT

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	My File Edit Tools Help	
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Activate	Description	Date Added Time Added Added
Allocate	Return johns stuff AdoramsSaxSchiller.doc	09/29/2010 10:14:41 To view a document: - Highlight the desired document
		- Fighting the desired document
Notes	Click on the attachment to open - a blue bar will highlight	-or-
Сору	the selected attachment -	Press "Enter" on the Keyboard
GL Allocations	then Click Accept	To add a document:
GL Summary		- Choose "Add" from the Toolbar
		- Pick the document to attach - Type in a description
Project Summary		
Training Course		To delete a document: - Choose "Delete" from the Toolbar
		OVR
	4 40.00 TENNIS BALLS FOR MIDDLE SCHOOLS	2.00000 Each 0.00 0.00
	5 1.00 TEST	100,00000 Each 0.00 0.00
	Accounts Total Amount 555.00	
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	My Approvals Approve Reject Forward	Hold Approvers
	Conversion	
	Convert to PO	
	III IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	ts (1)
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		ora,

- Click Attachments to view any attachments associated with the current requisition.
 The program indicates the number of attachments, if any, associated with the current requisition
- Double Click the attachment you wish to view OR
- Click on the selected attachment a blue bar will highlight your selection
- Click ✓ ACCEPT to open
- Close attachment
- Click Return to return to the Requisition File Maintenance screen.

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Switch Form	Dept/Loc 111 BLDG ADMIN SERVICES Status 4 Allocated Fiscal year General Notes Image: Constant Notes Requisition number Mv File	~
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GL Allocations GL Summary Project Summary	Address 11420 LACKLAT	
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Associated Notes <u>must</u> be viewed prior to approving, rejecting or placing a requisition in the hold status

- Associated notes, if any, will be indicated by a yellow highlighted folder in the General Notes field
- Click Notes (located on the left side of the screen in the Program Options group) to display a list of <u>ALL</u> notes associated with the current requisition
 - the program displays a list of existing General, Rejection and Hold notes
 - this Notes field is for display only; you cannot add or update notes in this field
- to display the text associated with a specific note, double-click the list entry
- FILE/EXIT to return to the list of notes
- FILE/EXIT to return to the Requisition File Maintenance screen.

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	Dept/Loc 505 PURCHASING		Status 6 Released	
Line Detail	Dept/Loc 505 PURCHASING Fiscal year 2011 © Current O Next		Status 6 Released	
Notes	Requisition number 169		Entered 10/06/2010	
GL Allocations	General commodity		Project accounts applied	
GL Summary		🗃 General Notes		
Project Summary	Vendor Information	Shipping Info	ormation	
Training Course	Vendor 400001 🔁 🗌 Committed	Ship to	200	
	Name BUSINESS SERVICES		PARKWAY WAREHOUSE	
	PO mailing 0		BEV - 314-415-8203	
	1460 CRAIG RD.		363 NORTH WOODS MILL ROAD	
			CHESTERFIELD MO 63017	
		Reference	TERRY REDDY	
	ST LOUIS MO 63146-4842	Kororonee	TENKT REDUT	
	Remit 0 🗃			
	😂 Vendor/Sourcing Notes			
	Line Qty Description	Unit Price	Freight Disc % Credit Line Total	1st Project
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	Total Amount 23000.00			
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- The Workflow group, located in Requisition Entry and PO Inquiry, contains buttons that allow a workflow approver to mimic the actions available in the Requisition Approvals – Tyler Menu program.
- The program may display a warning message if there are more pending actions than can be delivered.
- The Workflow group buttons are not accessible unless you are a workflow approver for the selected requisition.

"MY WORK DETAIL" REQUI	SITION APPROVAL – tab between fields – use CAPS
My Approvals	 click the <u>My Approvals</u> button to view the requisitions (one at a time) currently awaiting your approval
	 to view all approvals in your queue, use the arrows on the Navigation Bar (located below the Workflow Group) to scroll through the current list
	 click Browse to display all of the requisitions currently awaiting your approval
	 click on the requisition you want to view – a blue bar will highlight your selection
	4. click 🗹 Accept to open the requisition
	5. FILE/EXIT to close screen
Approve	 to view all approvals in your queue, use the arrows on the Navigation Bar (located below the Workflow Group) to scroll through the current list
	2. click <u>Approve</u> to approve the requisition and send it to the next level for further approval and complete the action
	3. File/Exit to close screen
Enter Rejection Information	
File Edit Tools Help] / ×],] @ ■ ■ ■ ■ ■ ⊕ ∞ ≂ ½]
Comment for this action (Required)	TYPE YOUR COMMENT HERE
	Your comment will be sent to originator via e-mail with rejection notice

📼 Mail From: <munisnoreply@pkwy.k12.mo.us></munisnoreply@pkwy.k12.mo.us>
File Edit View Actions Tools Accounts Window Help
🕱 Close 🦆 Reply & Reply All 🖼 Forward 🔹 🍘 🔹 🖾 📰 📰
Mail Properties Personalize Message Source Discussion Thread
From: <munishoreply@pkwy.k12.mo.us> 10/7/2010 9:10:48 AM</munishoreply@pkwy.k12.mo.us>
To:
Subject: Pending requisition rejected
The following requisition has been rejected by Approrover comment was: REJECTION TESTING NOTE #2
User has entered the requisition 169 (fiscal year 2011) for department 505 with the commodity code and a general description of TESTING RECEIVING #1.
This is a MUNIS system generated message. Please do not reply to this unmonitored mailbox.

Reject	 click <u>Reject</u> to send the requisition back to the originator for required changes
	2. USE CAPS - enter a brief comment of explanation (required)

 the workflow notification includes the name of any person who rejected the requisition - the message reads as follows:
 ✓ "The following requisition has been rejected by [workflow approver]. [Workflow]'s comment was: [comment].
✓ User [user ID] has entered the requisition [requisition number] [requisition fiscal year] for department [department code] with the commodity code [commodity code] and a general description for [commodity description]."
 click Accept to save information and complete action
4. File/Exit to close screen

Enter Forward Information	-	
File Edit Tools Help		
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Forward item to user:	Click arrow to open drop down menu - select recipient	
Comment for this action (Required)	Please review by Friday	
Enter the user ID to Forward this approval to.		OVR

Forward	1. click <u>Forward</u> to send the requisition another approver on the list for their approval
	2. your "Turn Forwarding On" link must be "ON" to forward
	3. click drop down arrow to open the list of recipients
	4. select name of recipient
	5. USE CAPS - enter a brief comment of explanation (required)
	 click Accept to save information and complete action
	7. File/Exit to close screen

Enter F	lold Information	\times
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Comment	for this action (Required) THIS IS BEING HELD UNTIL NEXT MONTH	
	OVR	

Hold	 click <u>Hold</u> to keep the requisition open – may be considered at a later date
	2. USE CAPS - enter a brief comment of explanation (required)
	 click Accept to save information and complete action
	4. File/Exit to close screen
Approvers	1. click <u>Approvers</u> to view an audit trail of approvals and the conversion of the requisition to a purchase order

Requisition File		
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	Discount % .000 OVR Contract Description Description	
	Line Qty Commodity Description Unit Price UOM Freight Disc % C 1 10.00 202 COPY PAPER 5.00000 REAM 0.00 0.00	

View Notes	1. to view associated notes for specific requisitions click on View Requisitions on the Requisition Approval screen
	 2. click Notes (located on the left side of the screen in the Program Options group) to display a list of the notes associated with the current requisition the program displays a list of existing general and additional descriptive notes the Notes field is for display only; you cannot add or update notes in this field 3. to display the text associated with a note, double-click the list entry
	4. FILE/EXIT to return to the list of notes
	5. FILE/EXIT to return to the main screen

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Activate	Description File	Date Added Time Added
Allocate	Return johns stuff AdoramsSaxSchiller.doc	09/29/2010 10:14:41 To view a document: - Highlight the desired document
Notes	Click on the attachment to	- Either Double Click with the mouse
Сору	open - a blue bar will highlig the selected attachment -	
GL Allocations	then Click Accept	To add a document:
GL Summary		- Choose "Add" from the Toolbar
		- Pick the document to attach - Type in a description
Project Summary		To delete a document:
Training Course		- Choose "Delete" from the Toolbar
	4 40.00 TENNIS BALLS FOR MIDDLE SCHOOLS	2,00000 Each 0.00 0.00
	5 1.00 TEST	100.00000 Each 0.00 0.00
	Accounts Total Amount 555.00	
	Workflow	
	My Approvals Approve Reject Forward	Hold Approvers
	Conversion	
	Convert to PO	
		ttachments (1)
		OVR

View Attachments	1. to view associated attachments for a specific requisition click Attachments located adjacent to the Navigation Bar
	 the number of attachments, if any, for a specific requisition will be indicated
	2. the Requisitions Attachments screen will open with a list of attachments associated with the current requisition
	3. to display the text associated with the attachment, double-click the list entry
	4. close attachment
	5. click Return to return to the Requisition File Maintenance screen

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NOTE: the General Ledger Allocations and Summary can be viewed by clicking on the GL Allocations and GL Summary buttons located in the Program Options Group (located on the left side of the screen).

Objective

This document lists all the available icons on the MUNIS toolbar and provides a description and a corresponding keyboard shortcut. It also lists any other keyboard shortcuts used in common MUNIS navigation.

MUNIS Toolbar

Icon	Definition	Keyboard Shortcut	Icon	Definition	Keyboard Shortcut
~	OK/Accept	Enter/Return	A	Display	
×	Cancel	Esc		PDF	
Ж	Cut	Ctrl-X		Output/Print	Ctrl-P
8	Сору	Ctrl-C		Save/Spool to a File	Ctrl-S
	Paste	Ctrl-V	R	Export to Word	n/a
•	Query Wizard	Ctrl-Q	K	Export to Excel	n/a
# \$	Find	Ctrl-F	U	Attachments	n/a
	Browse	Ctrl-B		MapLink	n/a
•	Add	Ctrl-A	ø	Tyler CM	n/a
\mathcal{D}	Update	Ctrl-U	*	Add to Favorites	n/a
\mathbf{x}	Delete	Ctrl-D	2	MUNIS Help	F1

Add/Update Mode Navigation

Enter	= commit transaction
Esc	= cancel transaction
Tab	= next field

Shift + Tab = previous field

Keyboard Shortcuts

Enter	= Commit Ti	ransaction
-	o 1 T	

- **Esc** = Cancel Transaction
- **Ctrl + Q** = Expression Builder
- Ctrl + F = Find
- Ctrl + B = Browse
- Ctrl + N = Add
- Ctrl + U = Update
- Ctrl + D = Delete
- Ctrl + P = Output / Print

Record Navigation

Ctrl + Down Arrow	= next record
Ctrl + Up Arrow	= previous record
Ctrl + Left Arrow	= first record
Ctrl + Right Arrow	= last record

- Space = opens drop down combo boxes when that field is activeF9 = opens browse help on a data entry field when that field is active.
- **F1** = launches Help from with MUNIS programs.