MUNIS V1.33
QUICK REFERENCE GUIDE
How to Enter a Requisition

1) After logging in, change to ALL CAPS.
2) Go to the Tree Menu (Left of screen):
    - Select **Dept**
    - Then select **G. Requisition Entry**
3) You will be directed to the **Requisition File Maintenance** Screen.
    - Click the **Add New Record** button (paper with the + on toolbar).
4) The **Dept/Loc** field should be automatically populated (highlighted in Blue). Do not change this value unless you are authorized to purchase items for other departments.
5) Tab through the following fields:
    - **Fiscal Year**
    - **Requisition Number** (highlighted in Blue)
6) When you reach the **General Commodity Code**:
    - Select a General Commodity code by clicking on the ellipses within the General Commodity Code field.
    - A list of commodity codes will come up. Select your commodity code by double clicking on the commodity code. You will be directed back to the Main screen.
    - Hit tab and the General Description field will auto fill with the description.
7) Hit tab again and the **Status** and **Entry Date** will auto fill.
8) Tab to the **Needed By** field.
    - Fill in a date or click on calendar icon to select a date.
9) **General Notes** replaced the *Post-it Notes*.
    - **At least one General Note is required in all requisitions:**
        - **Name, Building, Room Number, & Mailstop**.
            - The General Note is also used to communicate information that is helpful to you buyer to expedite the requisition such as Fax PO to Vendor; RUSH; etc. These types of comments must be entered on a separate Note than the delivery information.
    - Click the **General Notes** button.
    - Click the **Add New Record** button (paper with the + on toolbar).
        - The **Requisition; Date/Time;** and **Created By** fields will auto fill. Your mouse will be positioned in the Notes Line field.
    - Add your note, and then accept it by clicking on the **Green Check** (Top Left corner).
        - To add another note, click **Add New Record** button (paper with the + on toolbar) and repeat same as above.
    - When you have accepted your last note:
        - Close the **General Notes** screen by clicking on the **Red Box with the X in it** (Top Right corner of screen).
        - You will be directed back to the **Requisition File Maintenance** Screen

10) Tab to the **Vendor** field.
   - Select a vendor by clicking on the **Ellipses** within the **Vendor Number** field.
   - You will see **Vendor Help** dialog box.
   - Type the first several characters of the vendor's name **or** type in the entire vendor name (this must be entered in **ALL CAPS**).
     - A listing of vendors that matched the spelling you entered will appear. Double click to select the vendor that you will be using.
       - If the address displayed is not the one you need click on the **Ellipses** just after the vendor number. The **Vendor Address Help** screen will come up. Select the correct address by double clicking on it.
11) If your Vendor is not listed, please let us know by **Importing** a note in the **Vendor/Sourcing Notes**.
   - Click on the **Vendor/Sourcing Notes** button.
   - Click on the **Import** button (Left of screen).
     - The **Requisition Notes** screen will appear.
     - Select **New Vendor** (#4581) by Double Clicking that line.
       - Click the **Update the Current Record** button (paper with the pencil; on the Toolbar).
         - Fill in the requested fields.
           - Make sure the Vendor Application & W-9 Forms are sent to the Vendor. (You can get these forms on our Website at: http://purchasing.unlv.edu/PDF_Files/NEw%20Vendor%20App%201.30.07.pdf
           - When the fields are complete, accept the note by clicking on the **Green Check**.
         - Close the **Vendor/Sourcing Notes** screen by clicking on the **Red Box with the X in it** (Top Right corner of screen).
12) You will then return to the **Requisition File Maintenance** screen.
   - The **Entered By** and **Ship To** will be populated with default values.
13) Tab to the **Reference** field.
   - Fill in with the name of a **Contact Person** from your dept. and their full **Phone Number including area code**. This will be printed on the PO.
14) Press the tab key to get to the **Terms/Miscellaneous** Tab.
15) Tab through the following fields (no entry required in these fields):
   - **Discount %**
   - **Freight %**
16) The **Method/Terms** field will default to *Net 30 Days*.
   - This should remain unless you need a Cash With Order or Auto Payment Schedule.
     - If so, delete the *Net 30 Days* wording and type in CASH WITH ORDER or AUTO PAYMENT.
17) Tab to the **Bill To** field.
   - This will default to your Mail Stop.
     - If you need to change the Mail Stop, click on the ellipses and a listing of valid Mail Stop codes will appear. (If you are unsure,

leave it on the default value). ***This is an important step as this Mail Stop code will be used to ensure your invoices are mailed to you directly and NOT Accounts Payable.***

18) Tab through the following fields (no entry required in these fields):
    - **Special Handling** (it defaults as N-NONE)
    - **Allocation field**
    - **Buyer field**
    - **Review field**
    - **Type** (it defaults as N-NORMAL)
    - **Notify originator when converted to PO**
    - **Notify originator of overages**
    - **Contract Number**
    - **Work Order**
19) The **Line Detail** screen will appear.
    - Enter your **Quantity**.
20) Tab to **Commodity**.
    - Click the **Ellipsis** and the commodity you used in Main Tab will appear in the Commodity Help Screen. Click the **Green Check** (Top Left of the Commodity Help Screen).
    - A **Commodities Screen** will appear.
    - Select the **Object Code** and the **Sub Object Code** that best fits your purchase by Double-Clicking it. *Example*: 0131-30-E1
21) Tab through the **Item** field.
22) Enter the **Unit Price** and **Unit of Measure** (*example*: LOT, EA, MO)
23) Tab through:
    - **Freight**
    - **Discount Percent** (If Discount Percentage by vendor is given, then enter here)
    - **Credit**
24) Enter the **Line Item Description** (IN ALL CAPS). This must be a complete description of the item you are purchasing (part name, number, and item description). *For <u>multiple items</u> you must use <u>multiple lines</u> on the requisition.*
25) Tab through all remaining fields until you get to the Account field.
    - Enter the **Account Number** you want to use. Enter in the fund, the agency, the organization number followed by **.00**, then the object code. (*example* 2221-208-0870.00-30)
    - Tab until the amount is highlighted (on the Account line). Due to our current financial systems only one account may be used per line item
    - Click on the **Accept** icon (the Green Check) to accept this line item.
26) You will remain on the **Line Item Detail** screen. You may do one of the following:
    - **Update** the information you have entered by clicking on the **Update the Current Data** button (paper with pencil; on the Toolbar).
    - **Add** a second line item to your Requisition by clicking on the **Add** icon (paper with +; on the Toolbar).
    - **Accept** the information by clicking on the **Accept** icon (Green Check).
        - Close the **Line Detail** screen by clicking on the **Red Box with the X in it** (Top Right corner of screen).

- You will be directed back to the **Requisition File Maintenance** Screen.
- If you get an **Error Message** (Error Messages show at the Bottom Left of your screen), you may be using an account with insufficient funds.
    - Use a different account or wait another day (remember MUNIS is one day behind ADVANTAGE).

27) **Attach** necessary documentation such as Vendor Applications; W-9; Quotes and Competitive Exception forms by clicking on the **Paper Clip** icon (at Top of your screen, on the toolbar).
28) Click on the **Release** button (at Left Side of screen) to send the Requisition to the appropriate Approvers.
29) Click on the **Approver** button (at Left Side of screen) in order to view the approval status of your request (if applicable).