

Munis[®] Requisitions

Munis[®] Requisitions addresses the needs of a busy Central Purchasing agent. Requisitions allow individual departments to enter their own requests electronically. During data entry, the available budget is displayed online, commodity data is easily viewed, and contracted items can be searched and selected for purchase. Once the requisition obtains its needed approvals, it is forwarded to purchasing and is converted to a purchase order with a single keystroke. A Requisition-to-Bid process allows departments to request an item that must be bid on. The optional Munis Bid Management is notified of this requisition through workflow and can automatically create the bid documents from this requisition. Optional workflow allows sites to define price points for requisitions that must be put out to bid. With this functionality requisitions can not be converted to Purchase Orders without appropriate vendor quotes or until an awarded bid/contract has been established.

Requisition Entry

- Decentralized requisition processing and inquiry
- Available budget is displayed online during requisition entry and is updated as each requisition is entered, resulting in information that is always current
- Security codes determine if the entry clerk/user has the authority to exceed the available budget
- Supports the following types of requisitions: Purchase, Inventory, Work Orders, Requisition to Bid, Requisition to Contract
- Next-year entry of requisitions and purchase orders is supported for concurrent year processing
- Commodity and vendor look-ups provide ease of use
- Each Requisition line item allows an unlimited description that can also print on the Purchase Order
- Inventory items can be requested from Munis Requisitions or replenished by a Purchase Order
- Optionally consider pre-encumbrances in GL account's available budget check—excludes or includes requisition amounts when the available budget is calculated
- Allows encumbrances of sales and use tax
- Notify (email) the requisitioner when a requisition becomes a PO as well as when an AP invoice exceeds the original purchase cost
- Add User Defined attributes to requisitions to allow for customized attribute tracking of requisitions
- Import requisition notes from a selection of standard notes, such as printing a message for the vendor on the PO
- Customizable screens allow fields to be added and removed based on a user's preference

...continued on reverse

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Approvals

- Automatic routing of requisitions for approvals
- Approval routings may be set differently by department
- Notify (email) the requisitioner when the requisition is rejected, fully approved, or converted to a PO—signifying requisition approval helping to fully support distributed entry of requisitions
- Generate workflow business rules for requisitions based on GL account segments, over budget conditions, commodity codes, department codes, amount-based (such as all POs over 5000 must get the buyer's approval), or buyer id
- Ability to age, forward, and set up alternate approvers when out of the office

Integration

- Fully integrated to Munis:
 - » General Ledger/Budgeting
 - » Fixed Assets
 - » Work Orders/Job Cost
 - » Bid Management
 - » Purchase Orders
 - » Contracts
- Multiple purchase orders from a single requisition; one purchase order from multiple requisitions
- Integrates with Contracts to enforce contractual rules— which GL accounts to use, maximum amount per account for a given year, or pricing and discount terms
- Integrates with Fixed Assets, identifying purchases as assets for later auto-creation into the Fixed Assets system