

# MOHAVE COUNTY PROCUREMENT

*Presents*

# MUNIS TYLER ERP

*Requisition Entry Process*



# Training Goals

- Standardize Requisitions between Departments
  - *We are issuing more PO's than ever – over 600 per year!*
  - *Make processing and approvals easier/faster*
- Consolidate our changes to Requisition Entry procedures
  - *Formalize changes made over the years so there are no “surprise” corrections*

# What is a Requisition?

- A request to purchase goods or services
- Results in a Purchase Order once fully approved
- Flows from your Department to Finance to Procurement

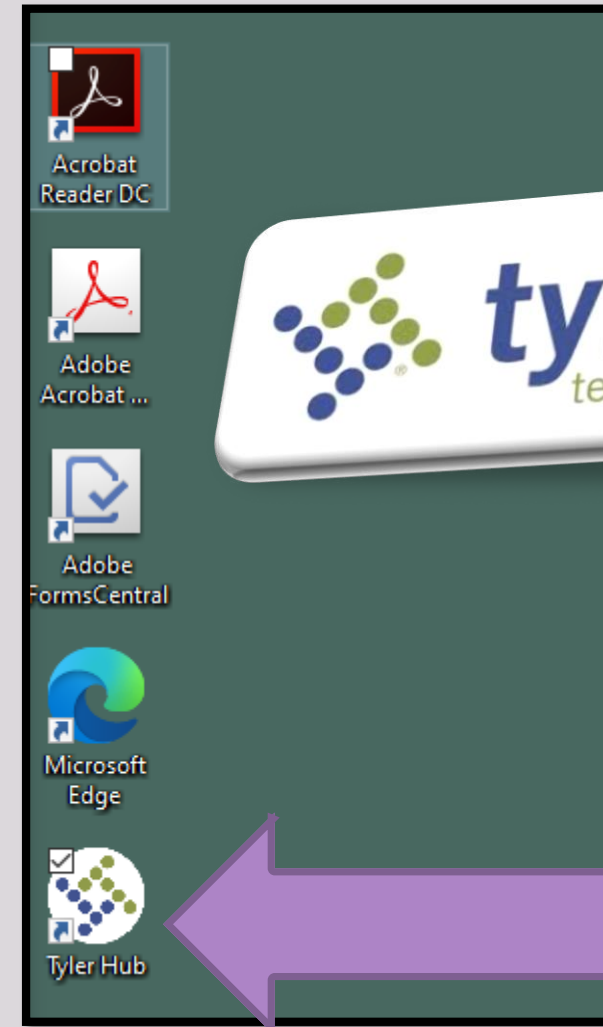
# What is a Purchase Order?

- Formalizes our intent to purchase goods or services
- Once issued, a PO is a **contract** - they made an offer, the PO accepts their offer
- There are a set of basic terms and conditions on the Vendor Copy of the PO
  - *Those apply if we have no written agreement.*
  - *We can also add terms and conditions through reference to another agreement (i.e., “REFERENCE CONTRACT #23B23”).*

**We agree to pay the vendor if they do what the PO asks.**

# Munis – Tyler Hub

- Mohave County utilizes Tyler Technologies Munis Financial Management Software for our internal procurement automation system. In the Munis system, the End User Departments submit online Requisitions which are routed for internal approvals and provide online status updates.
- Users may access MUNIS from their desktop via a MUNIS (Tyler Hub) shortcut icon or by visiting the county website,
  - *go to the Employees link at the bottom right corner of the page.*
- To get a Munis (Tyler Hub) shortcut Icon for your desktop, please follow the instructions in the next slide or contact Information Technology's **helpdesk** line by calling extension 4357.



# Creating a Munis Shortcut Icon

- On the Mohave County website, go to the Employees link at the bottom right corner of the page.
- Right click on the Munis hyperlink and copy link address.
- Right click in an open area on your desktop
- Select New and then Shortcut
- Right click in the box and select paste
  - *Select Next*
  - *Name your link*
  - *Select Finish*

The image illustrates the process of creating a shortcut icon in three steps:

- #1**: On the Mohave County website, navigate to the **Employees** link located at the bottom right corner.
- #2**: In the **QUICK LINKS** menu, right-click on the **Munis** hyperlink to copy the link address.
- #3**: In the Windows shortcut creation wizard, paste the copied URL into the text box labeled "Type the location of the item:". The URL shown is `https://tylerhub.mohavecounty.us/`.

# Munis – Tyler Hub

- The Requisition Entry program accepts and processes Requisitions, which are department purchase requests that precede purchase order issue.
- You must have the appropriate permissions to enter Requisitions. If these permissions have not been established, contact Information Technology's **helpdesk** line by calling extension 4357.
- The current screenshot displayed shows a sample of one User's personalized Menu, depending on permissions your Menu may differ.

The screenshot displays the Enterprise ERP Landing Page for Mohave County, AZ - PROD. The page features a navigation bar with a search box and a sidebar with a 'Tyler Menu' containing a search box and a list of categories (Enterprise ERP, Financials, Human Capital Management, System Administration, Reports, Help). A large purple arrow points to the search box in the Tyler Menu. The main content area includes three status cards (Approvals, Notifications, Alerts) and a 'Favorites' section listing recent activity.





# Before You Begin– Requisition Entry

- **DO NOT COPY A PAST REQUISITION** – This is how bad/old information continues to get through the process!!
- Be sure that your quote is complete. Are taxes and shipping/freight added?
- Be sure you have all your supporting documents available to upload as attachment(s)!
- **Be sure that you attach everything you are listing in the general notes as backup!!**



# Getting Started – Requisition Entry



- To enter a requisition, go to the Tyler Menu and type **Requisition Entry**, this will display the **Requisition Entry** link below the search bar, and clicking on it will bring you to the **Requisition entry** page.
- Similarly, you can use the **Search** bar at the top of the Tyler Hub page or add it to your favorites card, as shown in the screenshot.
- While your Tyler Hub Menu may differ from the screen displayed, **Requisition Entry** is where you need to be to enter a new Requisition, or to search for a previously entered Requisition.

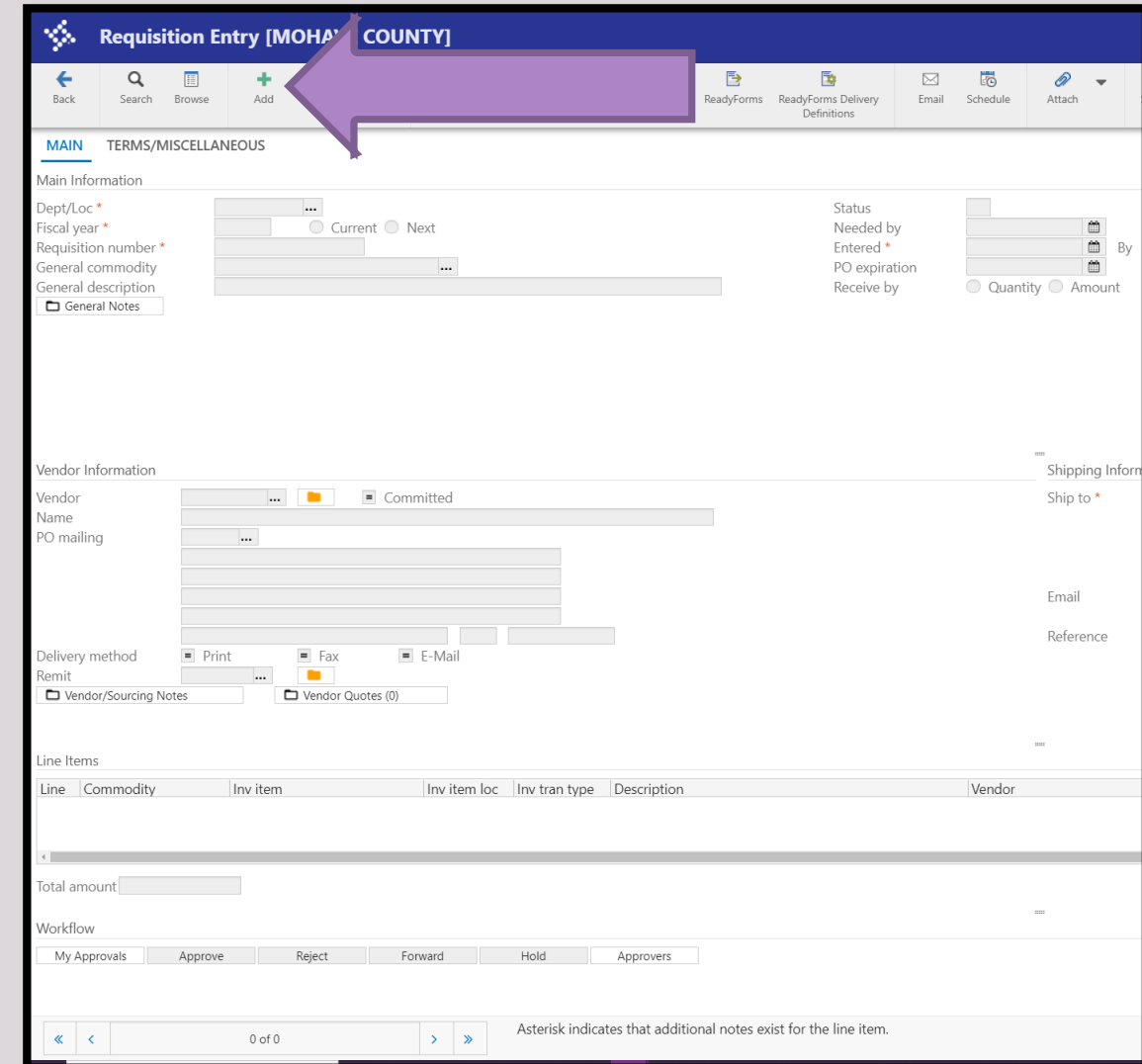
The screenshot displays the Enterprise ERP Landing Page for Mohave County, AZ - PROD. The page has a dark blue header with the title and a search bar. Below the header, there are three cards: Approvals (0), Notifications (0), and Alerts (0). The Tyler Menu is open, showing a search bar and a list of items under 'Purchase Order Processing', with 'Requisition Entry' circled. The Favorites section on the right lists 'Requisition Entry' as a recent activity. Purple arrows point to the search bar at the top right, the search bar in the Tyler Menu, and the 'Requisition Entry' link in the Favorites section.

# Requisition Entry

- The Requisition Entry window appears.
- When entering in the fields use all CAPITAL LETTERS as certain fields are case sensitive.

# Requisition Entry

- Click on the “+” tool Sign to Create a New Requisition.
- The fields of the Main Tab open for data entry.
- Some fields are required, others are optional. Required fields must be completed; you can press Tab on your keyboard to move past optional fields.



Requisition Entry [MOHAWUK COUNTY]

Back Search Browse Add ReadyForms ReadyForms Delivery Definitions Email Schedule Attach

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc \* Fiscal year \* Requisition number \* General commodity General description General Notes

Status Needed by Entered \* PO expiration Receive by

Vendor Information

Vendor Name PO mailing Delivery method Remit Vendor/Sourcing Notes Vendor Quotes (0)

Line Items

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor
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Total amount

Workflow

My Approvals Approve Reject Forward Hold Approvers

0 of 0 Asterisk indicates that additional notes exist for the line item.

# Requisition Entry

**#1** The Main Tab contains general information about the Requisition.

Requisition Entry [MOHAVE COUNTY]

Back Search Browse Add Update Delete Output Print Display PDF

MAIN TERMS/MISCELLANEOUS

Main Information

Dept/Loc \*

Fiscal year \*   Current  Next

Requisition number \*

General commodity

General description

General Notes

**#2** Dept/Loc Enter the 4-digit number with your department or project. This 4-digit number will self-populate some of the fields.

**#3** Fiscal Year The current Fiscal Year should self-populate for you; press Tab to move to the next field. The current Fiscal Year is 2025 (July 2024 through June 2025). You may change this by typing in the Fiscal Year field if you are entering a Requisition for the upcoming fiscal year (done typically in June). The Current/Next fields will change accordingly.

**#4** Requisition Number Tab to move to the next field, as you do so, the next available Requisition Number self-populates. **Do Not Change or Delete this Number.**

**#6** The General Description Enter a Brief Description that best describes the item/service in this field.

**#5** The General Commodity field is optional; however, it is recommended you decide on the applicable NIGP Code by clicking on the button at the end of the field to bring up a list of commodity types. Scroll through the choices and double click on the applicable code, the system will ask if you wish to accept the default for the General Description, You will get a pop-up window asking to select acceptance of the NIGP default description, select "NO"

# General Notes

**General Notes**

Back | Accept | Cancel | Print On PO | Import

Requisition Entry [TRAIN DATABASE Oct 15 2024] > General Notes >

Note

Requisition 2025 25565

Date/Time 2025-04-21 09:29  Print on PO

Created By SpoonB

## TO DEVELOP CONSISTENCY:

- INPUT THE BELOW INFORMATION IN ALL CAPS (ALWAYS SHOUT AT MUNIS!)
- ONE OF THESE:
  - CONTRACT #
  - COOPERATIVE #
  - 3 COMPETITIVE QUOTES OBTAINED
  - SMALL PURCHASE NOT TO EXCEED \$100,000 WITHOUT BOS APPROVAL
  - MICRO PURCHASE NOT TO EXCEED \$10,000

## IF APPLICABLE, INCLUDE:

- BOARD APPROVED XX/XX/XXXX ITEM XXX
- SMALL PURCHASE NOT TO EXCEED \$100K WITHOUT BOARD APPROVAL
- MICRO PURCHASE: NOT TO EXCEED \$10K WITHOUT APPROVAL
- Do not select "Print on PO"
- Select "Accept"

# Requisition Entry

**#11 Vendor** If you know the Vendor Number, enter it here, or you can click on the button at the end of the field to open a new screen and type in the VENDOR NAME (ALL CAPS) and double click on the applicable name, the vendor's information will self-populate. If you can't find the vendor, leave it blank for the responsible Procurement Officer to complete this field. It may be that a bidding process needs to be completed, if that is the case, leave this blank.

**#7 Status** This field self-populates with a number 2 for Created. It will change as you "allocate" funds on the Line Detail.

**#8 Needed By** You may choose to enter a required delivery date in this field or hit the Tab key to go to the next field if there isn't a specific deadline to receive your item/service.

**#9 Entered** This field will self-populate with the date you initially enter the Requisition.

**#10 By** This field will self-populate with your "username".

The screenshot shows the 'Requisition Entry' software interface. At the top, there is a navigation bar with icons for 'Forms Delivery Definitions', 'Email', 'Schedule', 'Attach', 'Switch Form', 'Line Items', and 'Release'. Below this is a form with several fields: 'Status', 'Needed by', 'Entered \*', 'PO expiration', and 'Receive by'. The 'Status' field is highlighted with a callout box. The 'Needed by' field has a calendar icon and is also highlighted. The 'Entered \*' field has a calendar icon and is highlighted. The 'PO expiration' field has a calendar icon. The 'Receive by' field has a calendar icon and is highlighted. Below these fields are radio buttons for 'Quantity' and 'Amount'. A 'By' field is also visible. Below the main form is a 'Vendor Information' section with fields for 'Vendor Name', 'PO mailing', and 'Delivery method'. There are also buttons for 'Print', 'Fax', and 'E-Mail'. At the bottom, there is a 'Line Items' table with columns for 'Line', 'Commodity', 'Inv item', 'Inv item loc', 'Inv tran type', and 'Description'.

# Vendor Notes

The screenshot shows the 'Vendor Sourcing Notes' interface. At the top, there is a navigation bar with icons for Back, Accept, Cancel, Print On PO, and Import. Below this is a breadcrumb trail: 'Requisition Entry [TRAIN DATABASE Oct 15 2024] > Vendor Sourcing Notes >'. The main section is titled 'Note' and contains several input fields: 'Requisition' with values '2025' and '20565', 'Date/Time' with '2025-04-21 09:35', and 'Created By' with 'SpooMB'. A checkbox labeled 'Print on PO.' is circled in black, with a purple arrow pointing to it from the right. A large empty rectangular box is outlined in blue at the bottom of the form.

TO DEVELOP CONSISTENCY:

- INPUT THE BELOW INFORMATION IN ALL CAPS

**QUOTE # AND CONTRACT REFERENCE  
CONTACT:**

**MOHAVE COUNTY  
PO BOX 7000  
700 W. BEALE STREET  
KINGMAN, AZ 86402  
CONTACT NAME / PHONE / EMAIL**

If applicable,

- \*MICRO PURCHASE: NOT TO EXCEED \$10K WITHOUT APPROVAL
- \*SMALL PURCHASE: NOT TO EXCEED \$100K WITHOUT BOARD APPROVAL

**\*\*PLEASE REFERENCE PO NUMBER ON ALL INVOICES\*\***

- Select "Print on PO"



# Requisition Entry

☰ Shipping Information

Ship to \*

Email

Reference

#12 Ship to: Enter where you want your order delivered

#13 Email: Enter the contact's email address

#14 Reference: Enter the contract number you are using.

# Requisition Entry

Requisition Entry [MOHAVE COUNTY]

Close Search Browse Add Update Delete Output Print Display PDF Save ReadyForms ReadyForms Delivery Definitions Email Schedule Attach Switch Form Line Items Release Activate Mass Allocate Allocate Notes Copy GL Allocations GL Summary Calc Sales/Use Tax Training Course

Requisition Entry [MOHAVE COUNTY]

Main **Terms/Miscellaneous**

Terms

Discount %

Freight %

Sales tax group  Sales tax %

Use tax group  Use tax %

Freight meth/terms

Bill to

Bill to email

Special handling

Contract

Number

Description

Miscellaneous

Allocation

Buyer

Review

Type

Purchase order

Notify originator when converted to PO/Contract.

Notify originator of overages.

Work Order

Number

Description

Task

#15 Terms: Tab through the section and make sure everything is zeroed out.

#16 Buyer: Input the Department's Assigned Procurement Officer.

# Requisition Entry

The screenshot shows a 'Line Items' requisition entry form. At the top, there are navigation buttons: 'Back', 'Accept', and 'Cancel'. Below this is the breadcrumb 'Requisition Entry [TRAIN DATABASE Oct 15 2024] > Line Items >'. The form is divided into several sections: 'Requisition' (Fiscal year: 2025, Number: 25566, Line: ...), 'Detail' (Quantity: 1.00, Commodity, Inventory Item, Location, Type: Pick ticket or Purchase), 'Description \*' (with an 'Add'l Desc/Notes' button), 'Miscellaneous' (Manufacturer, Vendor, PO mailing, Delivery method: Print, Fax, E-Mail, E-Procurement), 'Remit' (Remit: 0, Vendor/Sourcing Notes), and 'Bid' (Dept/Loc: 2700, Purchasing, Required by, Requested by, Receipt notification to, Capital asset: N, WO number, WO task, Notify buyer). On the right side, there are fields for Unit price (.00000), UOM (EACH), Freight, Discount percent (.00), Taxable amount (.00), Sales tax amount, Credit (.00), and Line item total. At the bottom, there is a table with columns: Seq, Org, Obj, Project, Description, Amount, GL Bud.

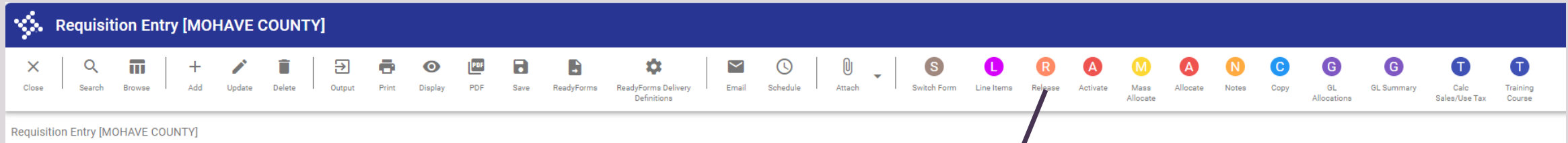
1. Quantity = Enter how much you are purchasing.
2. Description = A description of what you are buying for that line item.
3. Unit price = What is the price of that item.
4. Freight = Your freight charges go here.
5. Taxable Amount = This is the cost of the item, minus freight
6. Sales Tax Amount = LEAVE BLANK
7. Line Item Total = This should be the total for that line item.
8. Tab down to enter your Org and Obj Code.
9. Select "Accept".

# Requisition Entry

Select "Add" TO ADD your next line and complete the same steps in Line Item

YOUR REQUISITION SHOULD MIRROR YOUR QUOTE.

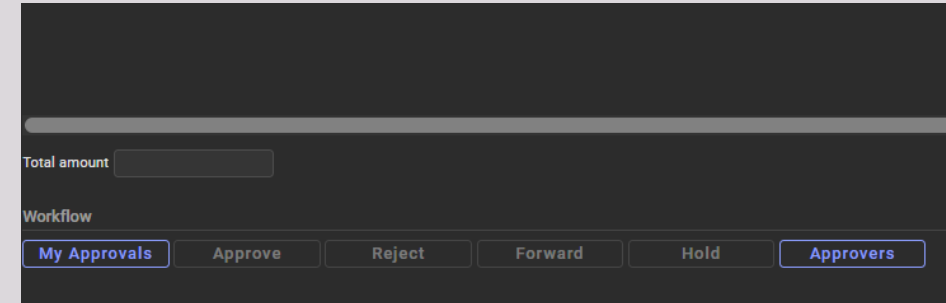
# Requisition Entry



Once your Requisition is complete,  
select “Release”

# What happens after release?

- “Release” sends the requisition through approvals
- Generally, the approval flow will be:
  - *Your Dept (can be several steps)*
  - *Finance*
  - *Procurement Officer*
  - *Procurement Director*
- You can check where it is at with the “Approvers” button, scroll all the way down

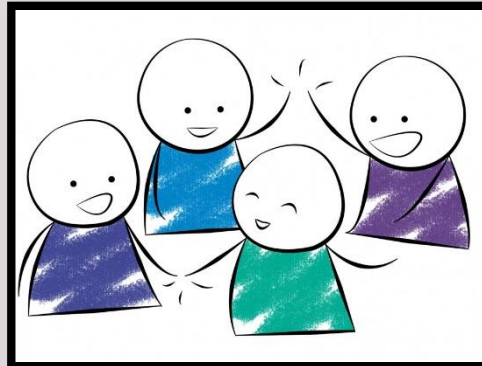


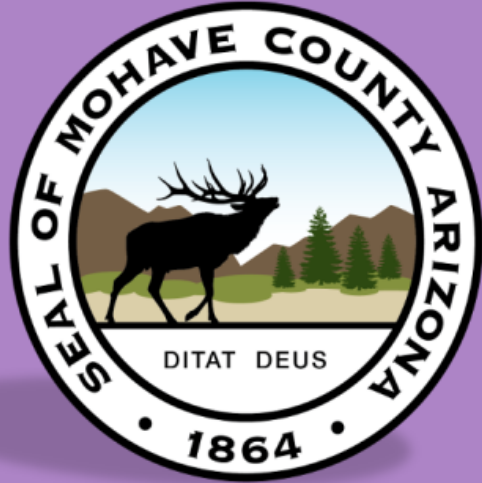
Step	Status	Activated Date	Activated Ti
▼ 10	Complete (Approved)		
▼ By source business rule - Any Group Complete			
McDaniel, Nathan	Complete	08/07/2024	15:34
Smart, Stephen	Auto approved by: McDanN	08/07/2024	15:34
Willistein, Jeremy	Auto approved by: McDanN	08/07/2024	15:34
▼ 20	Complete (Approved)		
▼ By source business rule - Any Group Complete			
McDaniel, Nathan	Complete	08/07/2024	15:35
▼ 43	Complete (Approved)		
▼ By source business rule - Any Group Complete			
Gholson, Dawn	Auto approved by: jarams	08/08/2024	09:26
Jaramillo, Sonyia	Complete	08/08/2024	09:26
Ralph, Sheryl	Auto approved by: jarams	08/08/2024	09:26
Toledo, Judy	Auto approved by: jarams	08/08/2024	09:26

# Questions or Concerns?

Don't hesitate to contact us, we're here to help.

- Morgan Michaels, Procurement Supervisor
  - [MichaM@mohave.gov](mailto:MichaM@mohave.gov)
  - x4347
- Dusty Lewis, Procurement Officer
  - [LewisD@mohave.gov](mailto:LewisD@mohave.gov)
  - x4376
- Teresa Garrett, Procurement Officer
  - [GarreT@mohave.gov](mailto:GarreT@mohave.gov)
  - x4412
- Shelli Whaley, Procurement Officer
  - [WhaleS@mohave.gov](mailto:WhaleS@mohave.gov)
  - X4376
- Barbara Spoonhour, Procurement Officer
  - [SpoonB@mohave.gov](mailto:SpoonB@mohave.gov)
  - x4321
- Josh Kant-Wood, Procurement Technician
  - [KantWJ@mohave.gov](mailto:KantWJ@mohave.gov)
  - X4458
- Tara L. Acton, NIGP-CPP, CPPB, Director of Procurement and Central Services
  - [ActonT@mohave.gov](mailto:ActonT@mohave.gov)





# Mohave County Procurement Department

700 W. Beale Street  
Kingman, AZ  
86402

Office Hours 8:00 A.M. – 5:00 P.M.