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").*

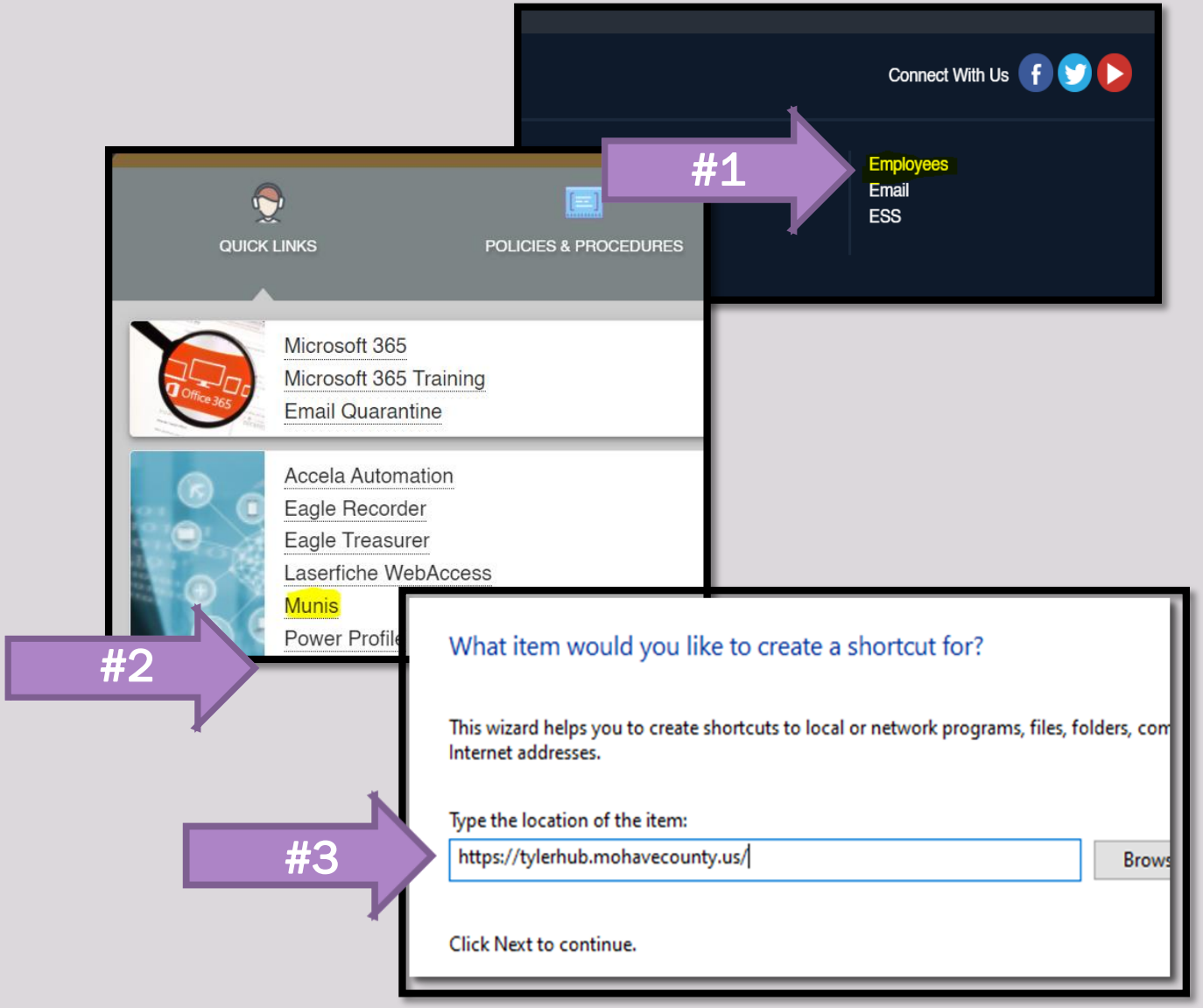
We agree to pay the vendor if they do what the PO asks.

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.

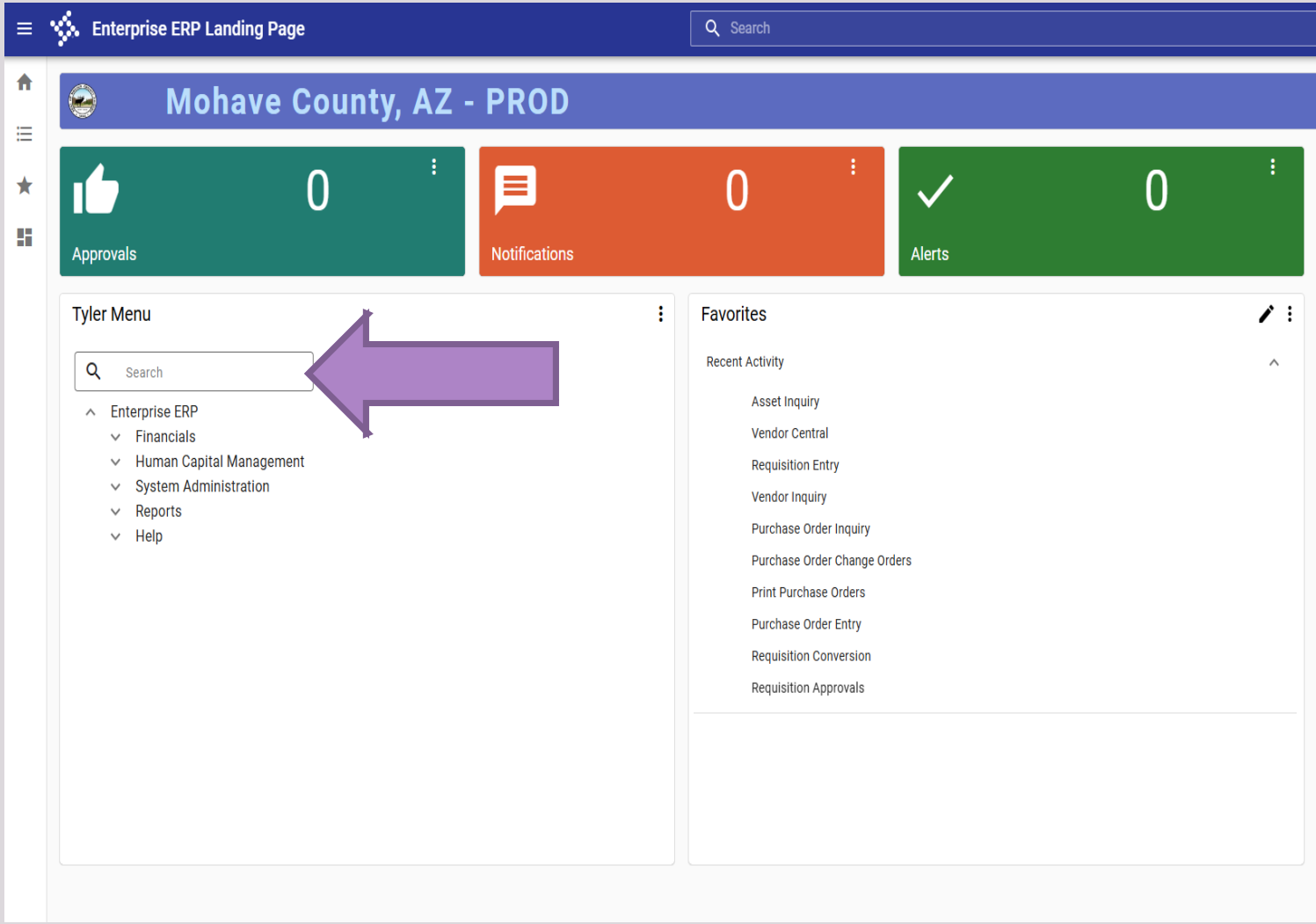
Creating a Munis Shortcut Icon

- 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*



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.

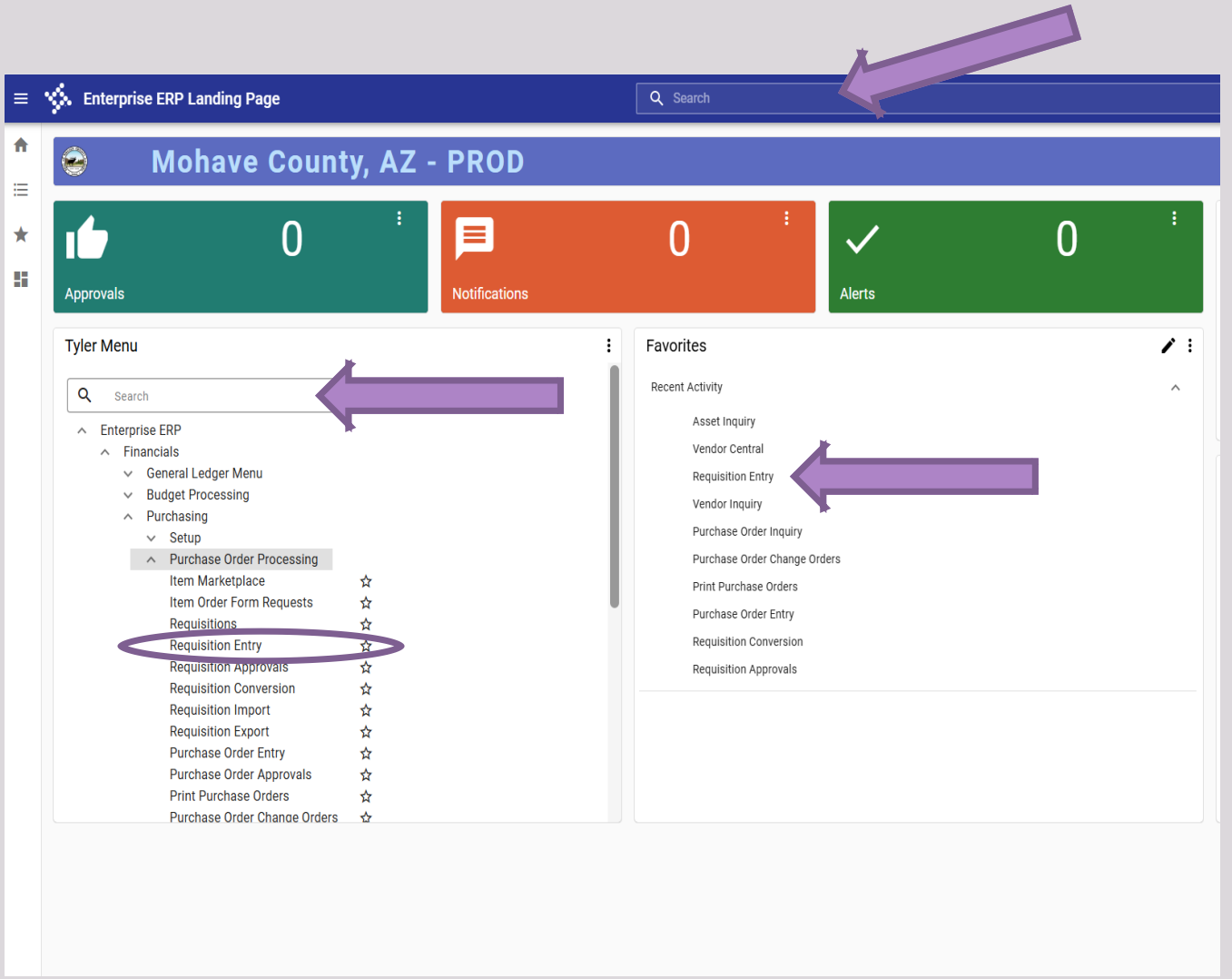


Before You Begin– Requisition Entry

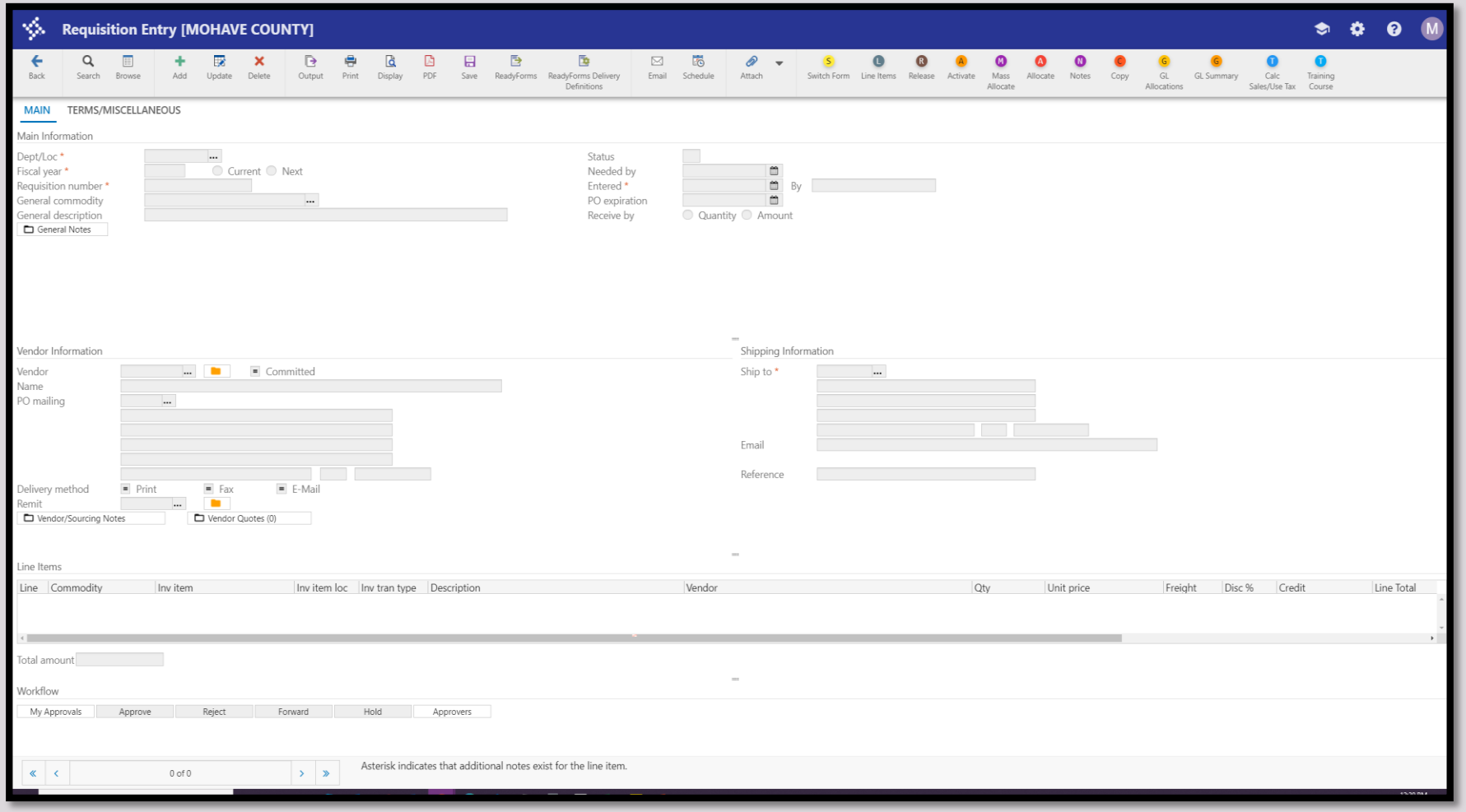
- DO NOT COPY A PAST REQUISITION – This is how bad/old information continues to get through the process!!
- Be sure that your quote is complete. Are taxes and shipping/freight added?
- Be sure you have all your supporting documents available to upload as attachment(s)!
- Be sure that you attach everything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



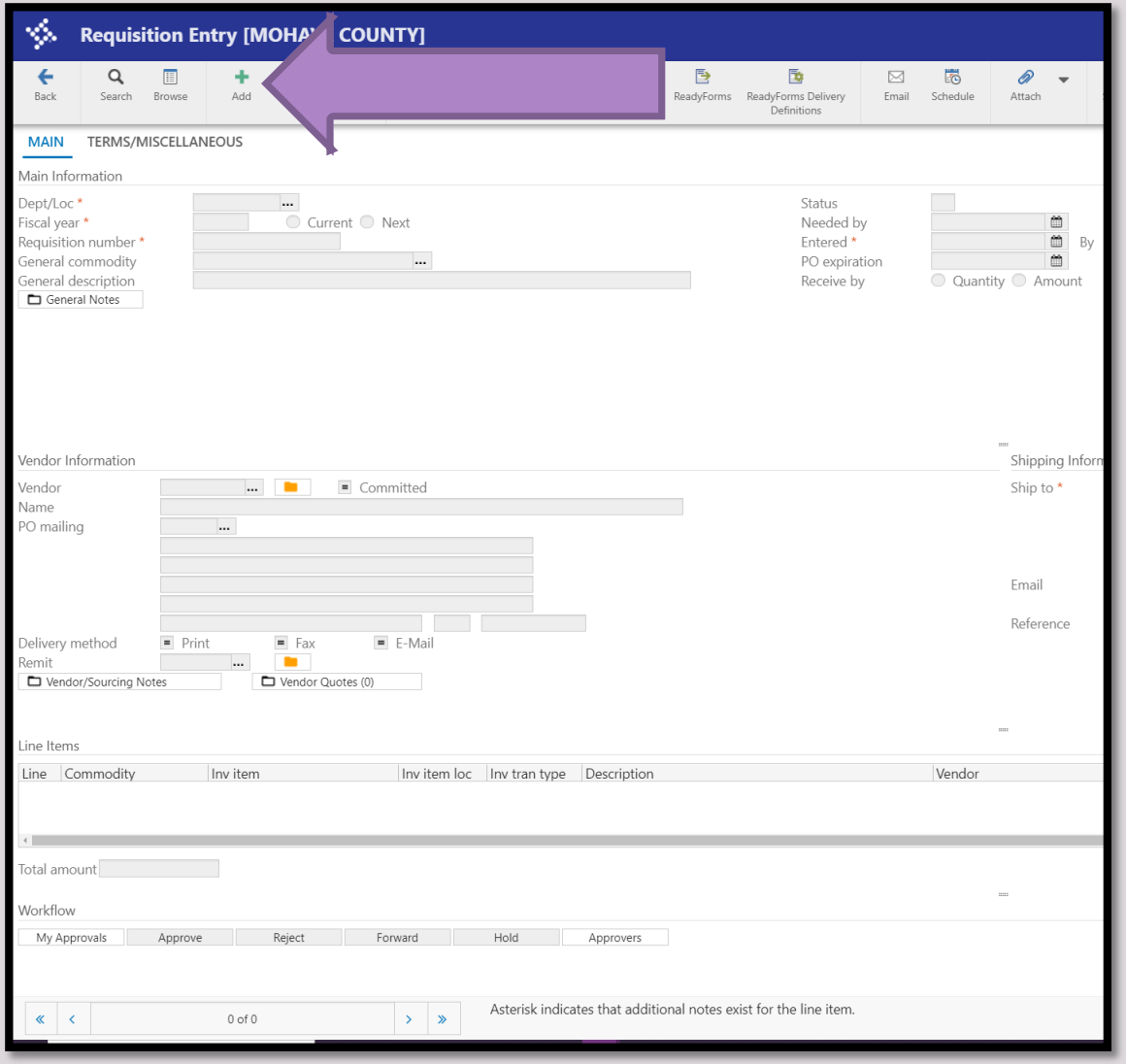
Requisition Entry



- 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.



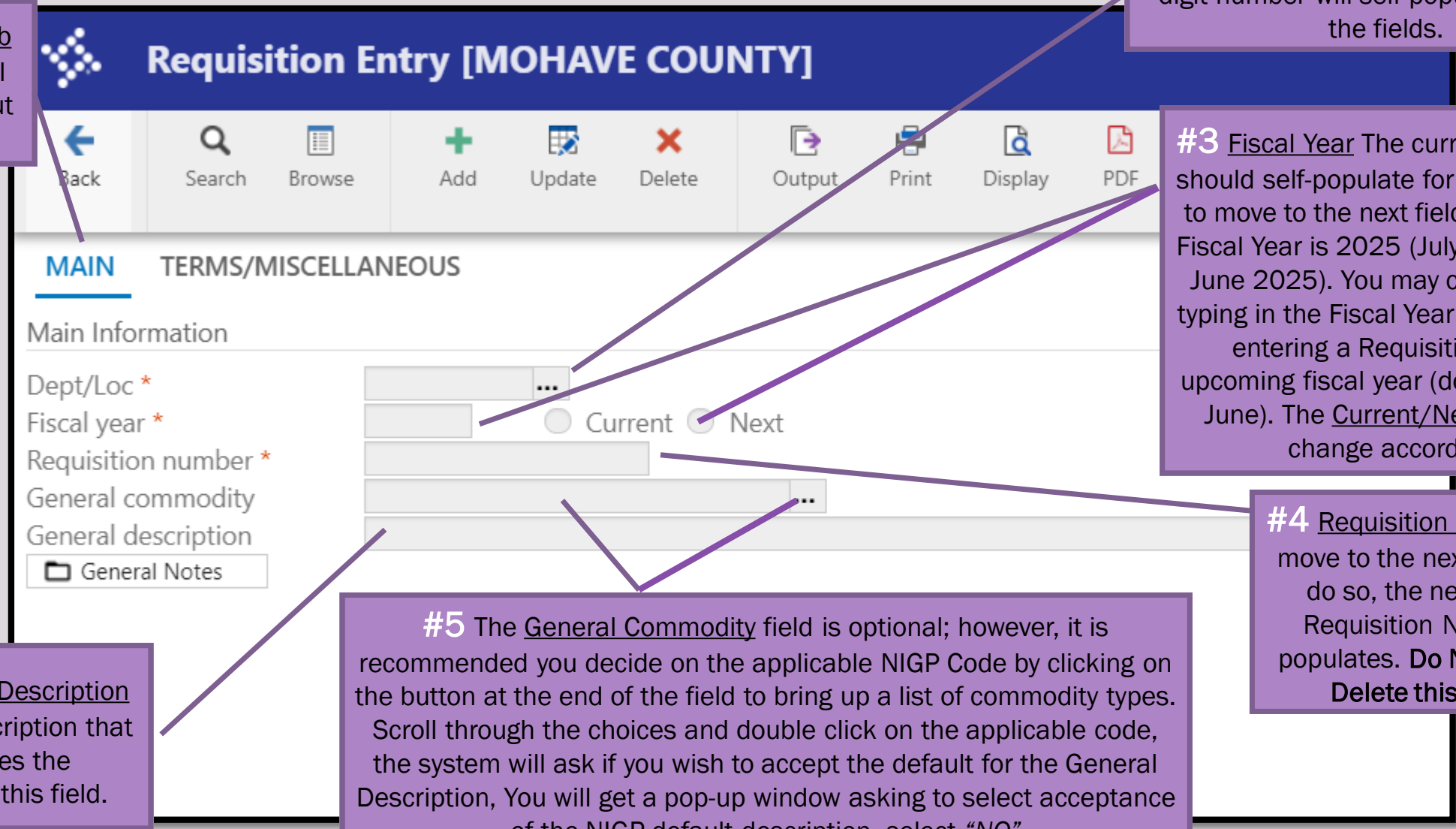
Requisition Entry

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

#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.

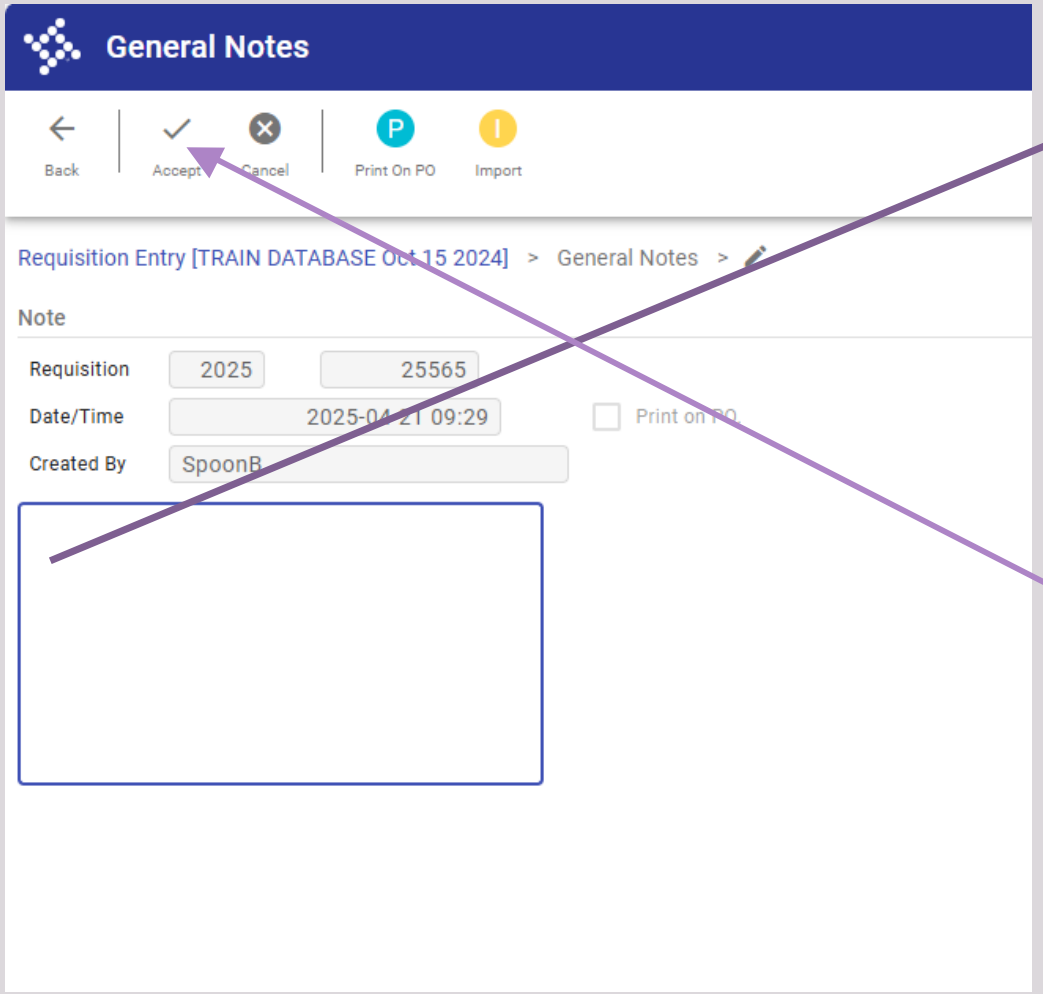
#4 Requisition Number Tab to move to the next field, as you do so, the next available Requisition Number self-populates. **Do Not Change or Delete this Number.**



#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"*

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

General Notes



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”

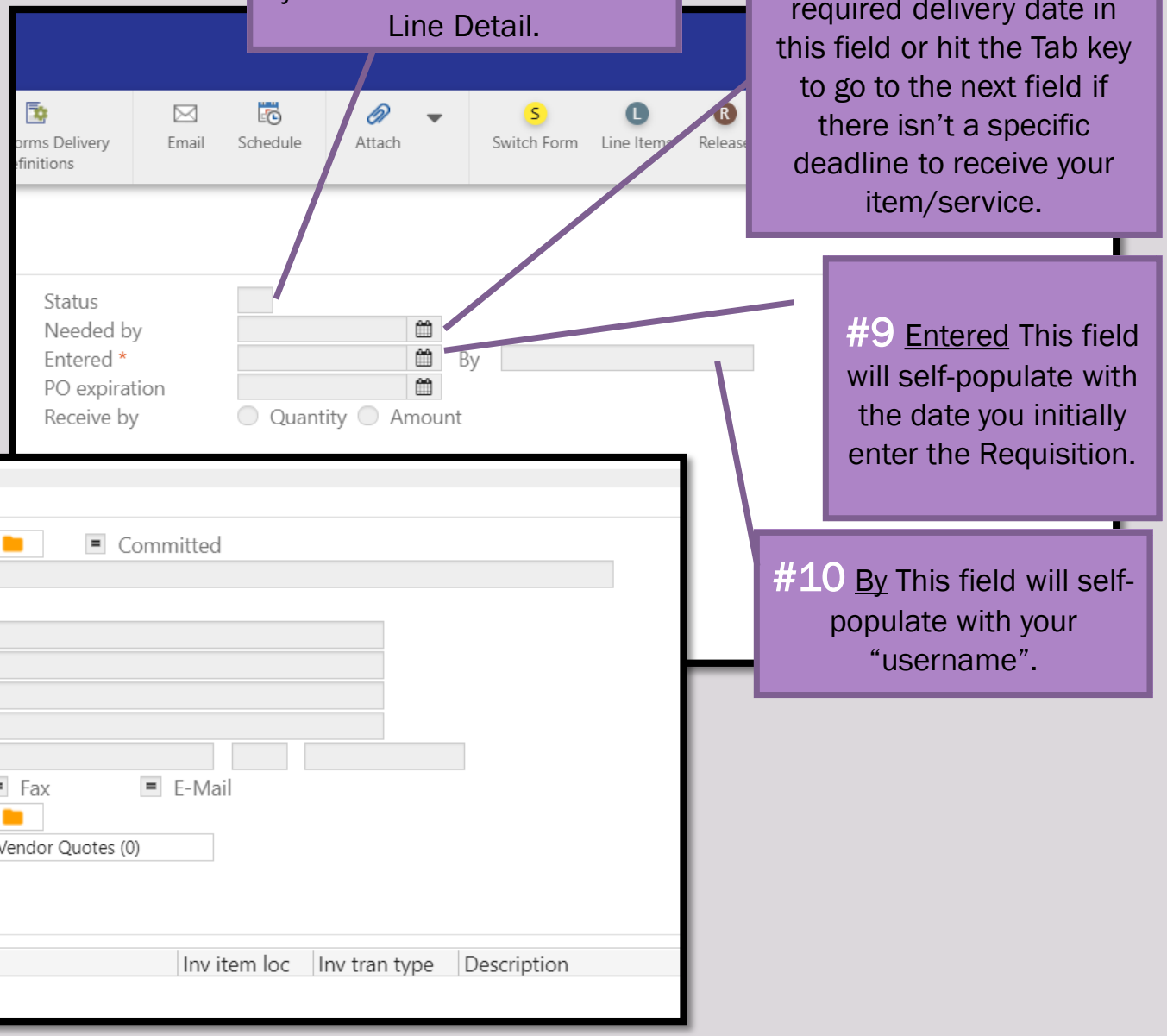
- Select “Accept”

Requisition Entry

#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.

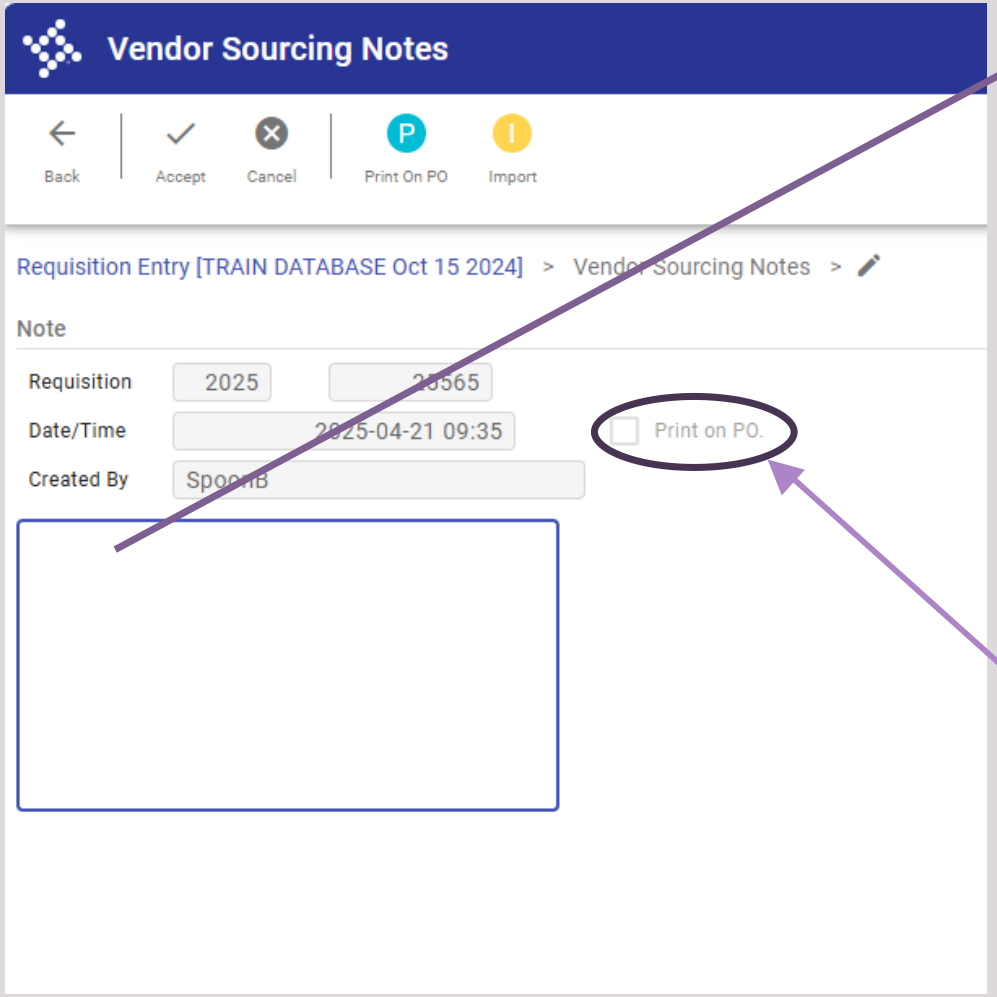
#11 Vendor If you know the Vendor Number, enter it here, or you can click on the button at the end of the field to open a new screen and type in the VENDOR NAME (ALL CAPS) and double click on the applicable name, the vendor's information will self-populate. If you can't find the vendor, leave it blank 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.



#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".

Vendor Notes



TO DEVELOP CONSISTENCY:

- INPUT THE BELOW INFORMATION IN ALL CAPS

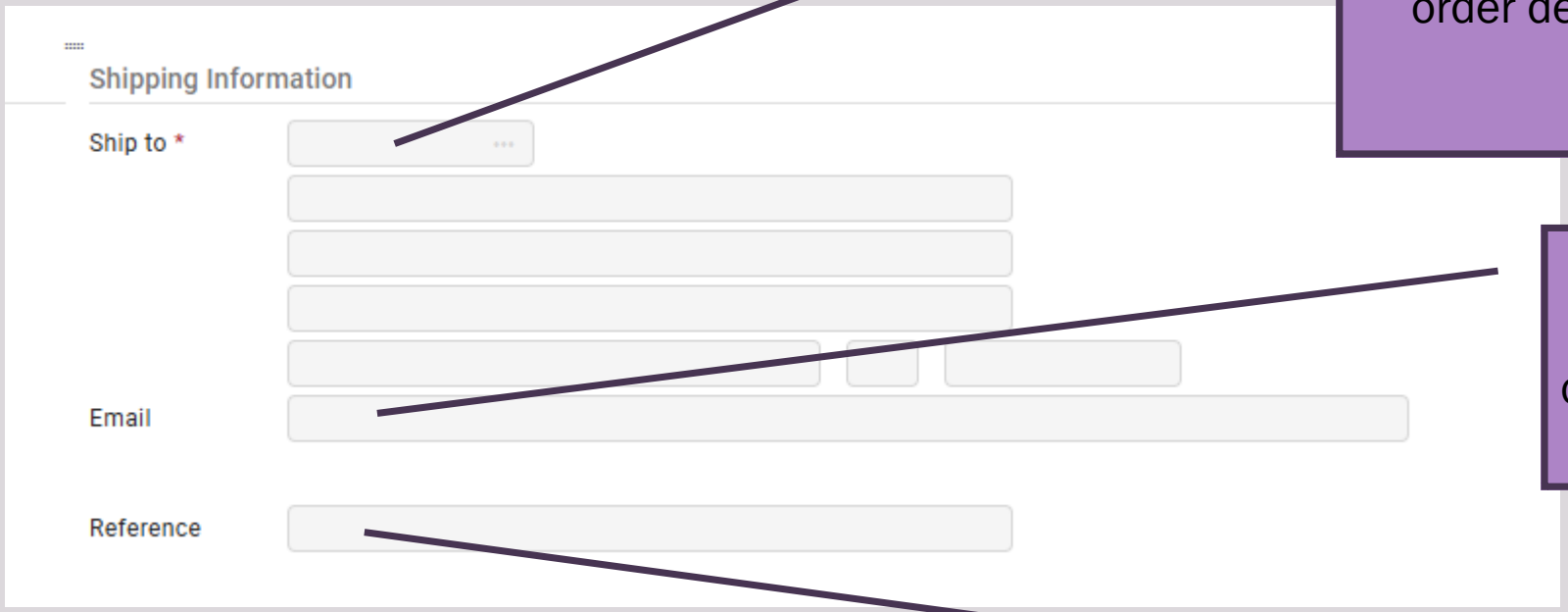
  QUOTE # AND CONTRACT REFERENCE
  CONTACT:
  MOHAVE COUNTY
  PO BOX 7000
  700 W. BEALE STREET
  KINGMAN, AZ 86402
  CONTACT NAME / PHONE / EMAIL

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

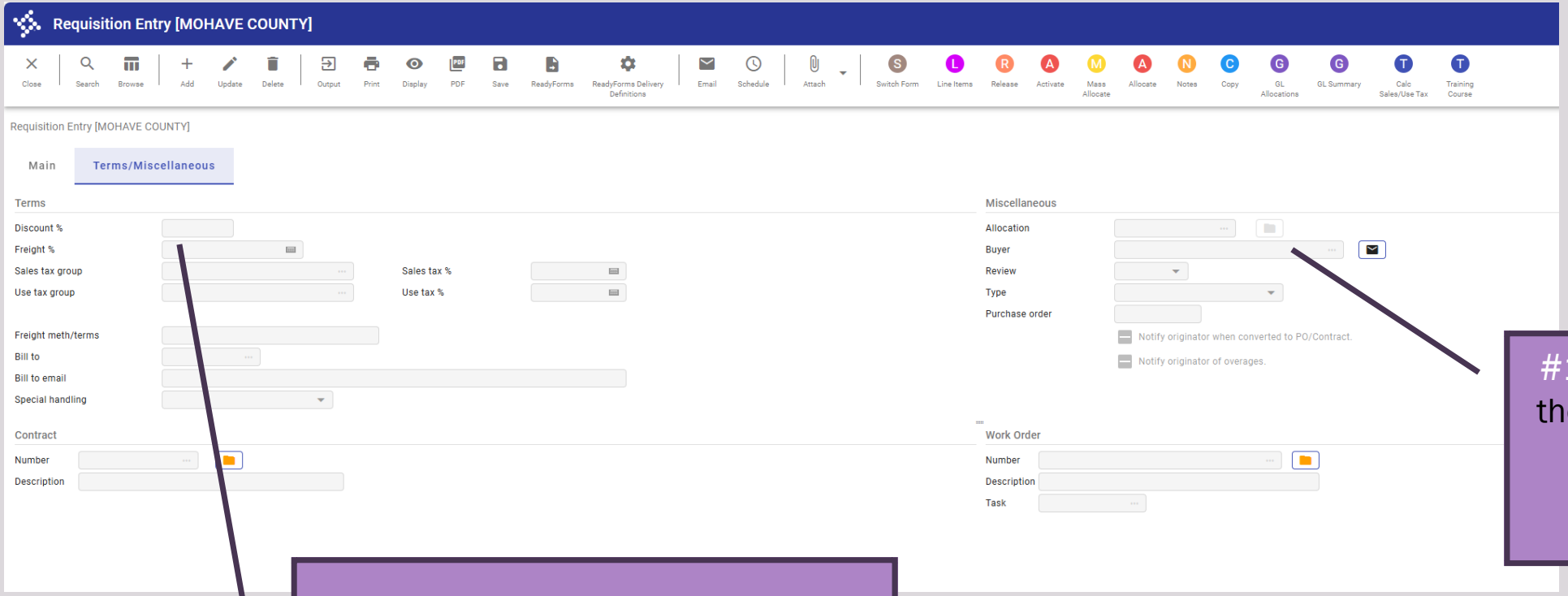


#12 Ship to: Enter where you want your order delivered

#13 Email: Enter the contact's email address

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

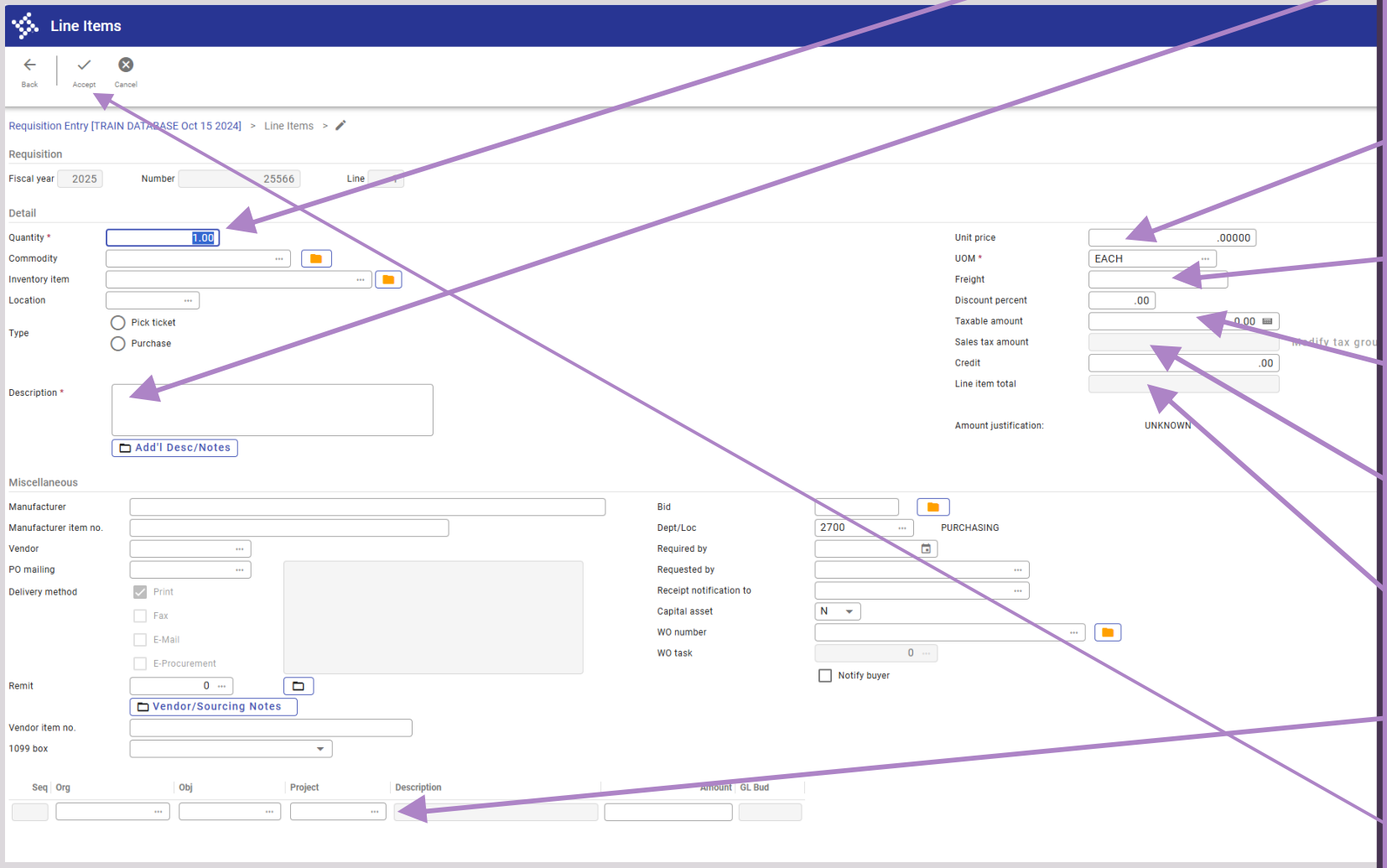
Requisition Entry



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

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

Requisition Entry



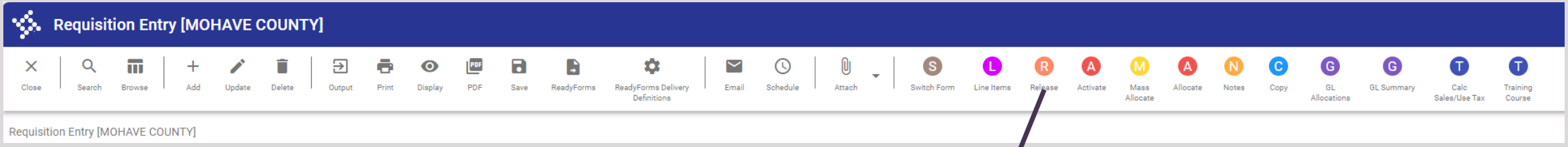
1. Quantity = Enter how much you are purchasing.
2. Description = A description of what you are buying for that line item.
3. Unit price = What is the price of that item.
4. Freight = Your freight charges go here.
5. Taxable Amount = This is the cost of the item, minus freight
6. Sales Tax Amount = LEAVE 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.

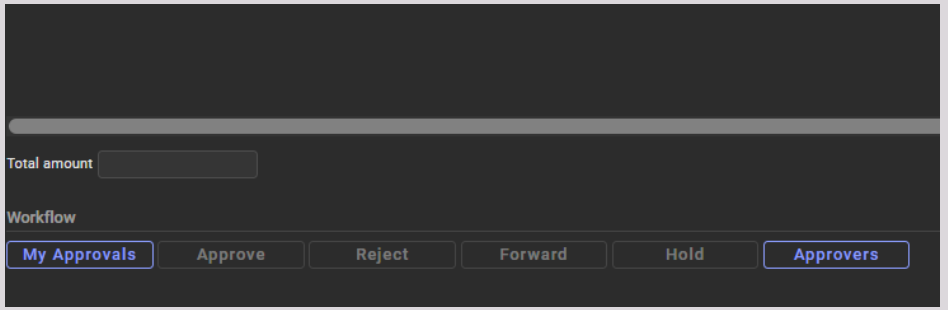
Requisition Entry



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



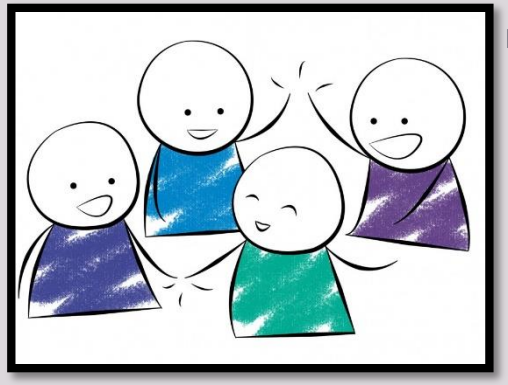
Steps

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
  - x4347
- Dusty Lewis, Procurement Officer
  - LewisD@mohave.gov
  - x4376
- Teresa Garrett, Procurement Officer
  - GarreT@mohave.gov
  - x4412



- Shelli Whaley, Procurement Officer
  - WhaleS@mohave.gov
  - X4376
- Barbara Spoonhour, Procurement Officer
  - SpoonB@mohave.gov
  - x4321
- Josh Kant-Wood, Procurement Technician
  - KantWJ@mohave.gov
  - X4458
- Tara L. Acton, NIGP-CPP, CPPB, Director of Procurement and Central Services
  - ActonT@mohave.gov

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