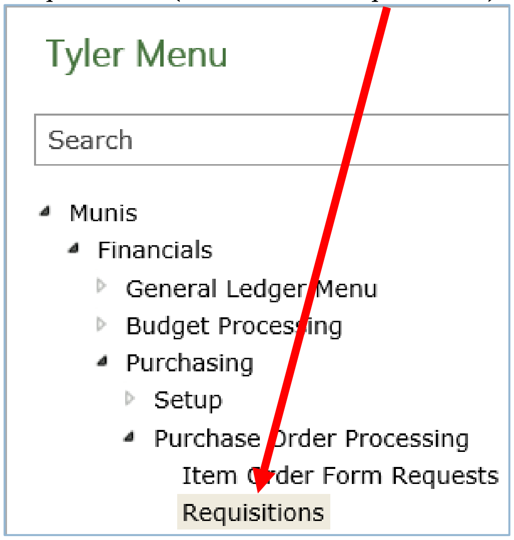
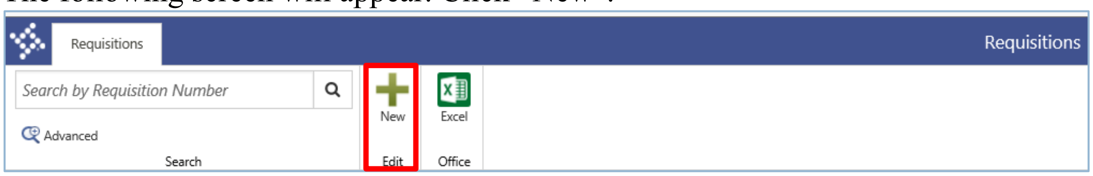
TO REQUEST A PURCHASE ORDER

1. From the Tyler Menu, go to Financials>Purchasing>Purchase Order Processing> Requisitions (i.e. click on requisitions)



2. The following screen will appear. Click “New”.

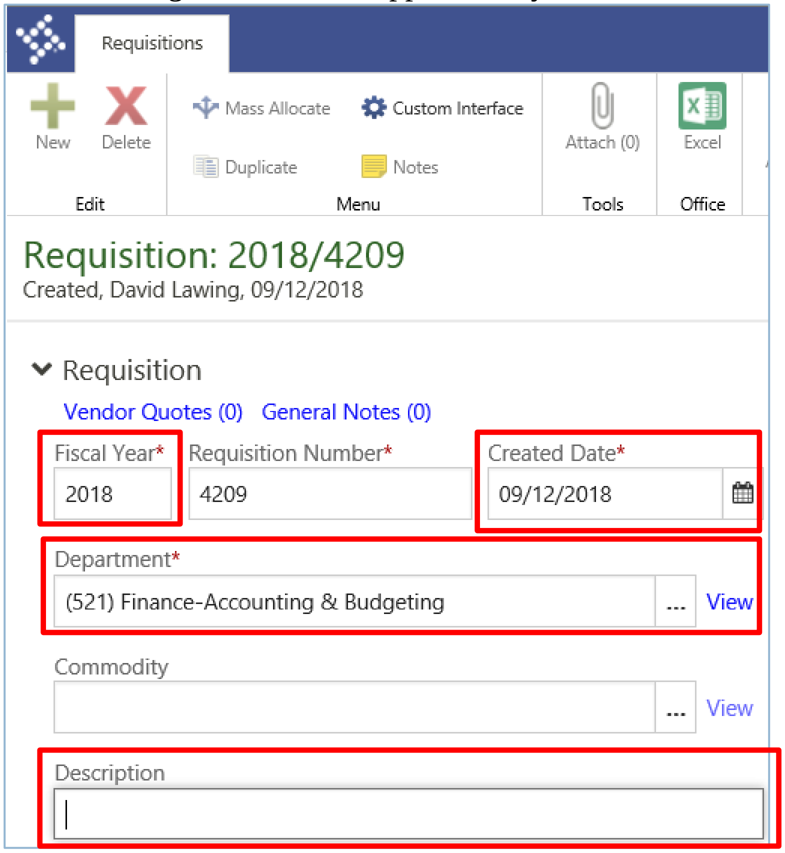


The requisition page will open for data entry. This page is broken down into 4 sections:
A - Requisition
B - Item Details
C - Allocations
D - Optional Details.

3. Be sure to ***always*** use the tab key and not click in the fields.

A. Requisition Section

The following screen should appear, and your cursor should be in the description field.

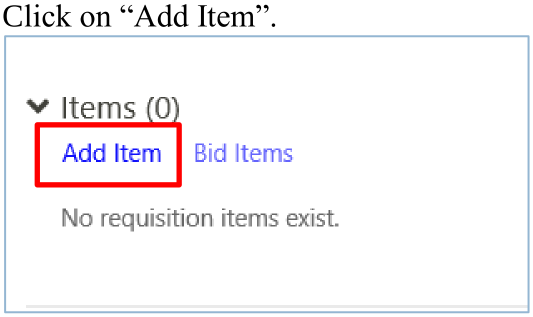


Verify data is correct in "Fiscal Year, Created Date and Department" boxes. Make changes as necessary. **Do not enter anything in the "Commodity" field**. Only enter a *brief* description in the "Description" field (Office supplies, Custodial Supplies, Toner Cartridges, etc.). A full description will be entered in the next section.

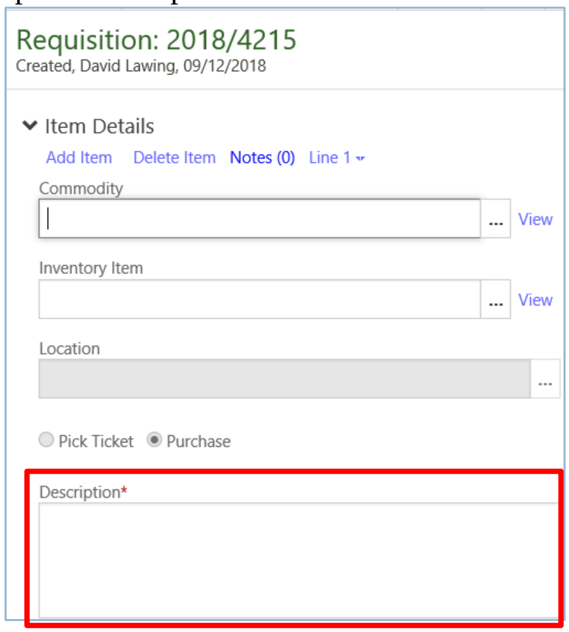
The fiscal year can only be adjusted in the month of June. It will only need to be adjusted if you are requesting a purchase order for the subsequent fiscal year.

B. Items Section

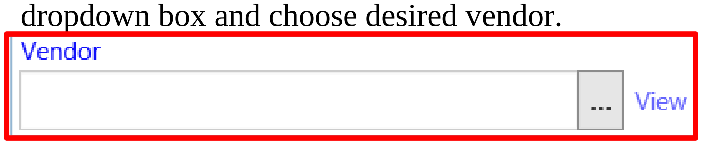
Click on "Add Item".



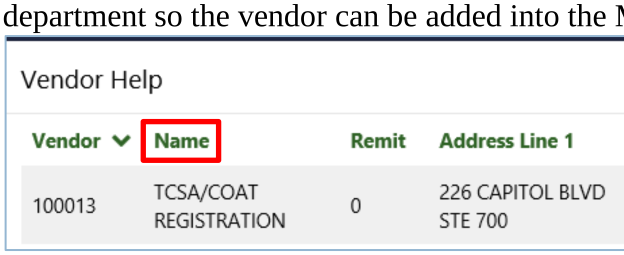
The requisition will save and open the item details page. Tab to the “Description” field and enter a detailed description of the item(s) being purchased. This information will print on the purchase order.



Tab to the “Vendor” field. Enter the vendor name or number or click the ellipses for the dropdown box and choose desired vendor.

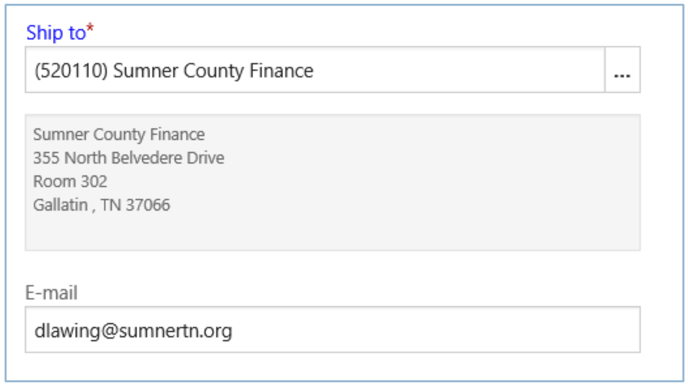


By clicking on the ellipses, the vendor column can be sorted by name by clicking on “Name” to make it easier to find the vendor. ****DO NOT attempt to add a new vendor**. If a vendor is not set up, please provide a completed IRS Form W9 to the finance department so the vendor can be added into the Munis system.

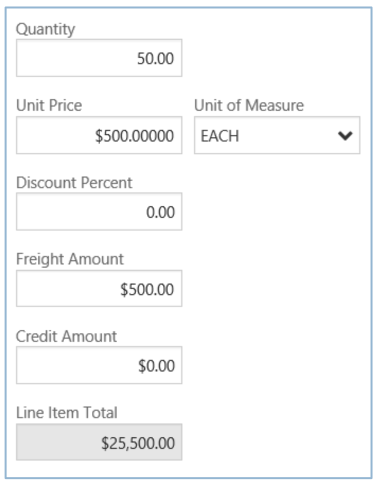


If the ship to and email addresses are correct, tab to “Quantity”. If the ship to address is incorrect, click on the ellipses and select the correct address. If an address needs to be added, contact the finance department.

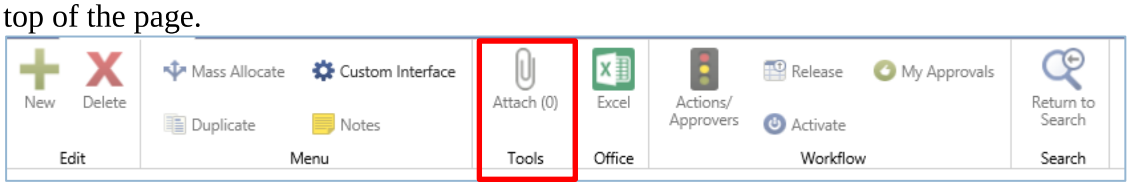
If the email address is incorrect, enter the correct address. If this is a permanent change, contact the I.T. Department to update the address.



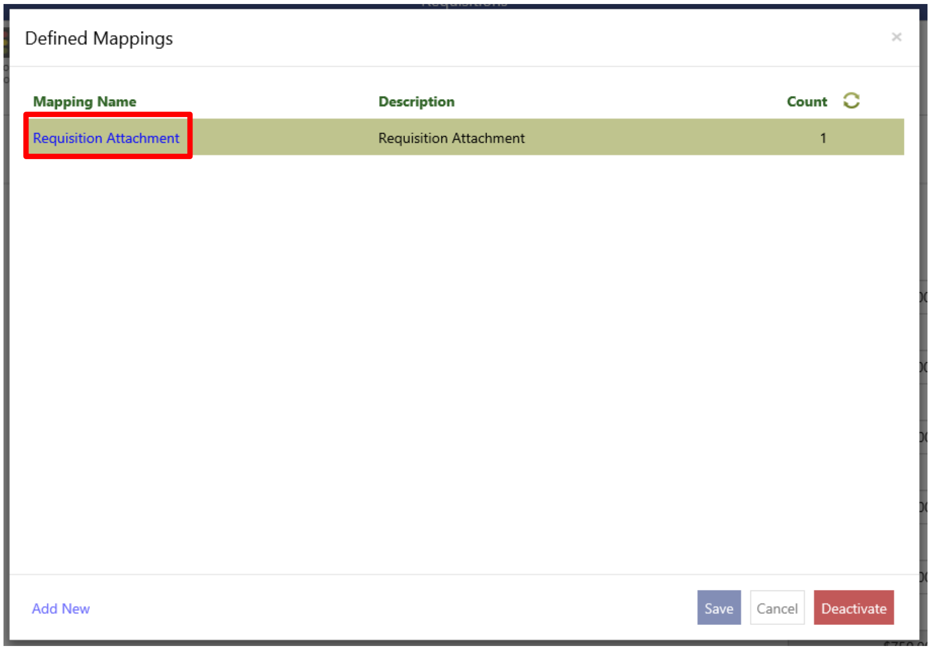
Enter "Quantity", "Unit Price" and other needed details, then tab to "Line Item Total". The total should have automatically calculated. If there are no attachments, skip to Section C.



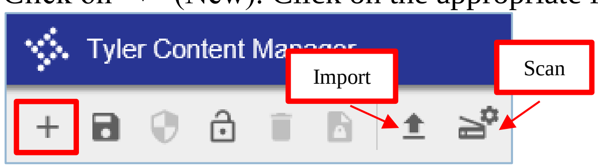
If you have quotes, a bid or any other supporting documentation, click on "Attach" at the top of the page.



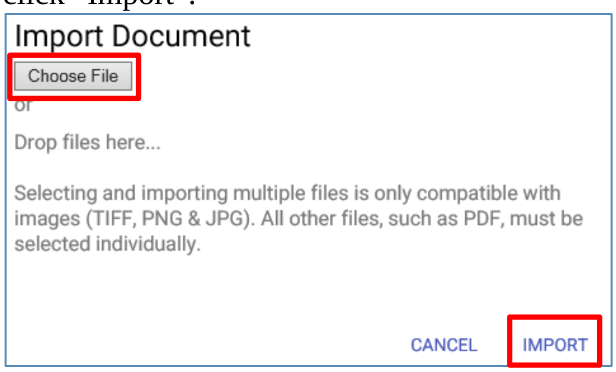
Click on "Requisition Attachment". This will open Tyler Content Manager.



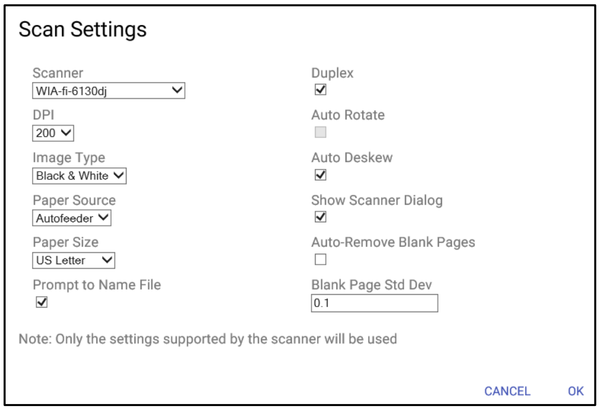
Click on "+" (New). Click on the appropriate icon to import or scan the document(s).



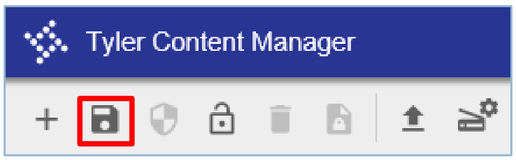
If the document will be imported into TCM, click "Choose File", select the document and click "Import".



If the document will be scanned into TCM, place the document in the scanner and click "Scan". **All scanners may not be the same so this step may vary slightly.

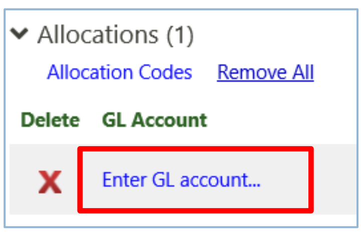


After the document has been attached (imported or scanned), click "Save" and exit out of TCM.



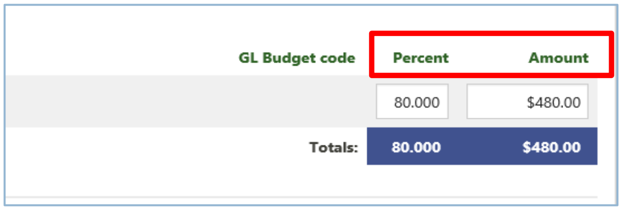
C. Allocations Section

Click "Enter GL account"

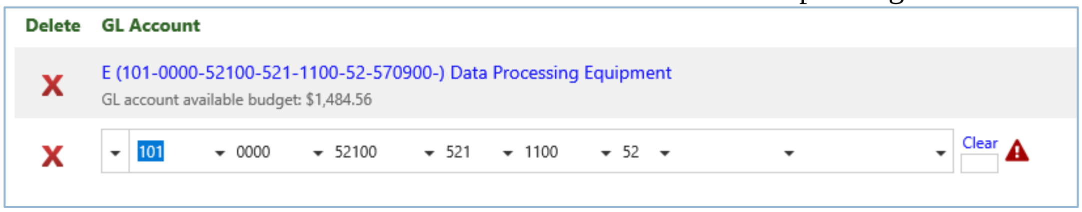


Select the general ledger (GL) account from the drop-down boxes. Most of the account segments should be populated. **Descriptions are provided on each segment (e.g. data processing equipment)

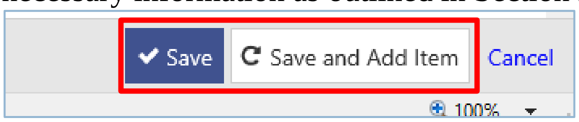
This will automatically allocate 100% of the amount being purchased to this account line. If the purchase needs to be split between multiple, enter the percent or amount for the first account line.



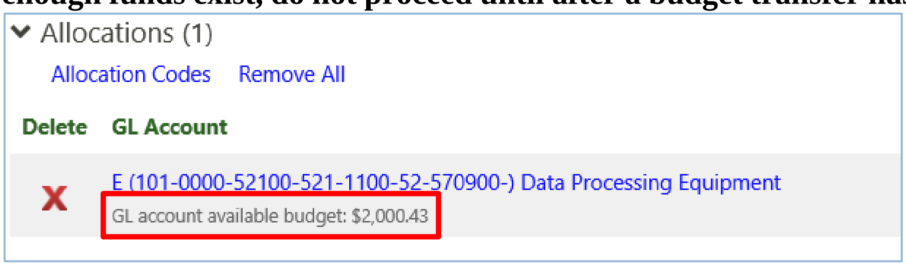
Hit tab twice to add another GL Account line. Enter the corresponding account line.



Adjust the percentage or amount if needed and repeat until the full amount has been allocated. When the allocation is complete, click "Save" or "Save and Add Item". If "Save and Add Item" is chosen, the screen will return to the Item Details Section. Enter necessary information as outlined in Section B. above.

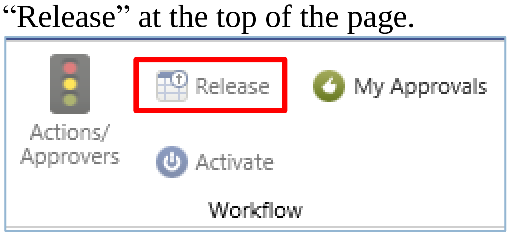


When the screen looks like this, everything has been entered successfully, and the available budget is good and ok to proceed. If the account line needs to be changed (wrong account, not enough funds, etc.), click on the red "X", click on "Add Allocations", and repeat the steps in C above. ****If you have the correct account line entered but not enough funds exist, do not proceed until after a budget transfer has been processed.**

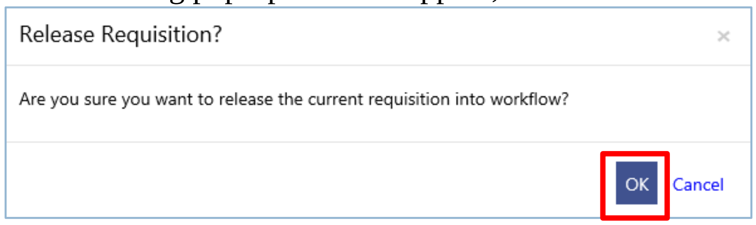


D. Optional Details Section

After all items have been entered and the PO request is ready to be submitted, click "Release" at the top of the page.

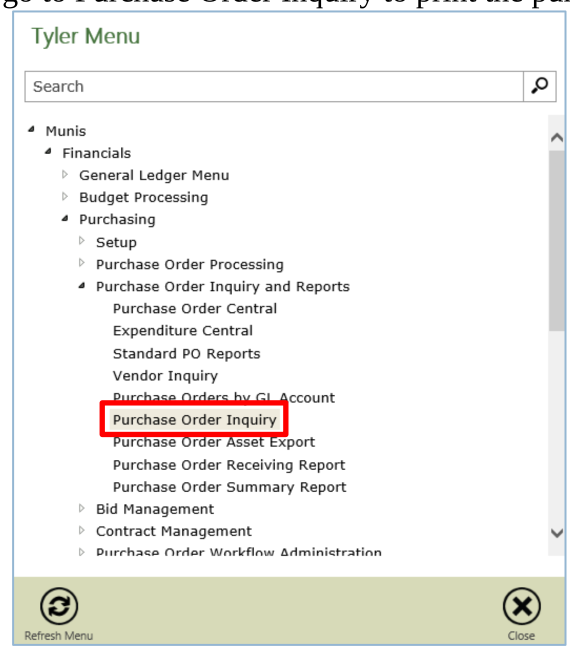


The following pop-up box will appear; click OK.

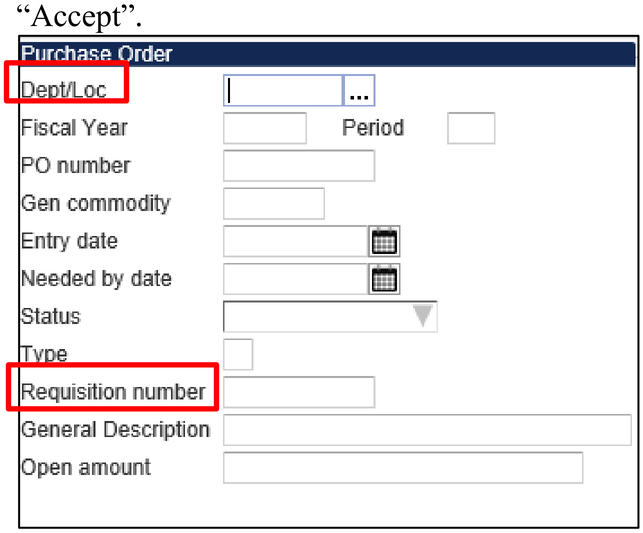


This will forward the PO request to the finance department. You will receive an email typically within 2 hours that the PO request has either been approved or rejected. If the requisition was rejected, refer to “Rejected Purchase Order Requisition” instructions.

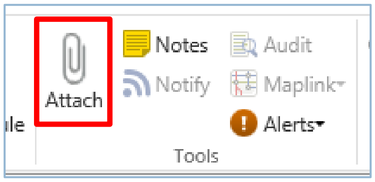
If the email states the requisition was approved, within 30 minutes of receiving the email, go to Purchase Order Inquiry to print the purchase order.



Click “Search”; enter the department and requisition numbers (from the email) and click “Accept”.



Click “Attach”



Double click “Purchase Order”. The PO may be saved to your computer or printed. If there is a “0” in the Count column for Purchase Order and it has been at least 30 minutes since you were notified the PO was approved, notify the AP Dept.