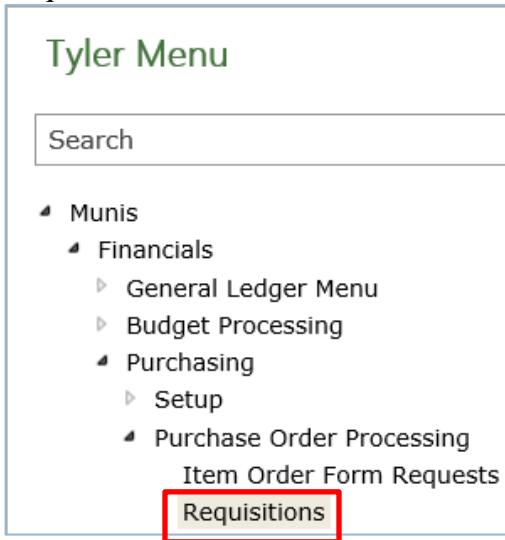
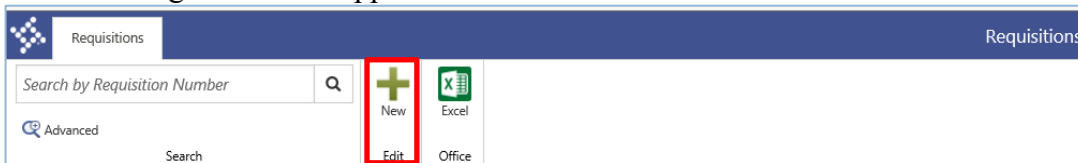


## TO REQUEST A PURCHASE ORDER

1. From the Tyler Menu, go to Financials>Purchasing>Purchase Order Processing>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.

Requisitions

New Delete

Mass Allocate Custom Interface

Attach (0) Excel

Duplicate Notes

Edit Menu Tools Office

**Requisition: 2018/4209**  
Created, David Lawing, 09/12/2018

▼ Requisition

Vendor Quotes (0) General Notes (0)

Fiscal Year\* Requisition Number\* Created Date\*

2018 4209 09/12/2018

Department\*

(521) Finance-Accounting & Budgeting ... View

Commodity

... View

Description

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”.

▼ Items (0)

Add Item Bid Items

No requisition items exist.

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.

**Requisition: 2018/4215**  
Created, David Lawing, 09/12/2018

▼ Item Details  
[Add Item](#) [Delete Item](#) [Notes \(0\)](#) [Line 1](#) ▼

Commodity  
 ... [View](#)

Inventory Item  
 ... [View](#)

Location  
 ...

Pick Ticket  Purchase

Description\*

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

Vendor  
 ... [View](#)

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.

Vendor Help			
Vendor ▼	Name	Remit	Address Line 1
100013	TCSA/COAT REGISTRATION	0	226 CAPITOL BLVD STE 700

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 information technology department to update the address.

If the email address is incorrect, enter the correct address. If this is a permanent change, contact the information technology department to update the address.

Ship to\*

(520110) Sumner County Finance

Sumner County Finance  
355 North Belvedere Drive  
Room 302  
Gallatin, TN 37066

E-mail  
dlawing@sumnertn.org

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.

Quantity  
50.00

Unit Price \$500.00000 Unit of Measure EACH

Discount Percent  
0.00

Freight Amount  
\$500.00

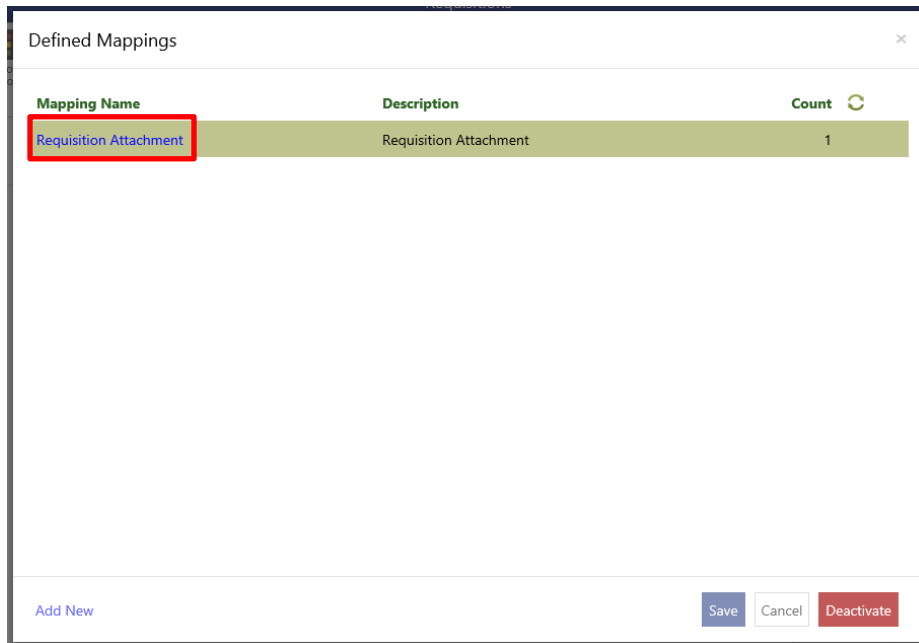
Credit Amount  
\$0.00

Line Item Total  
\$25,500.00

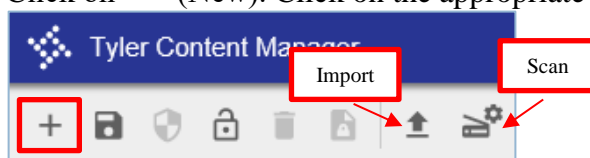
If you have any supporting documentation, click on “Attach” at the top of the page.

New	Delete	Mass Allocate	Custom Interface	Attach (0)	Excel	Actions/ Approvers	Release	My Approvals	Return to Search
Edit		Duplicate		Tools		Office		Workflow	
		Notes				Activate		Search	

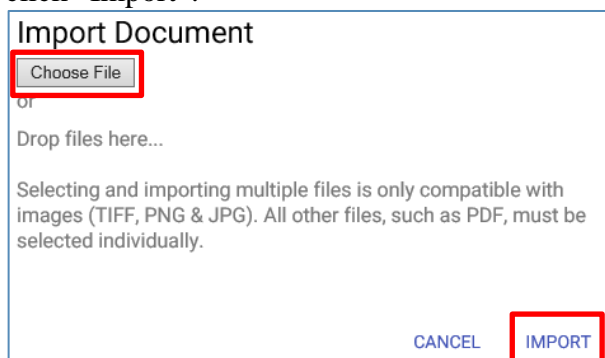
Click on “Requisition Attachment”. This will open Tyler Content Manager.



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

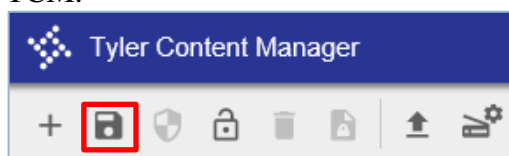


If the document will be imported into TCM, click “Choose File”, select the document and click “Import”.



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”

Allocations (1)  
Allocation Codes Remove All  
Delete GL Account  
X 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)

Allocations (1)  
Allocation Codes Remove All  
Delete GL Account  
570900 - Data Processing Equipment  
X E 101 0000 52100 521 1100 52 570900 Clear ✓  
GL account available budget: \$2,000.43

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.

GL Budget code	Percent	Amount
	80.000	\$480.00
<b>Totals:</b>	<b>80.000</b>	<b>\$480.00</b>

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

Delete GL Account  
X E (101-0000-52100-521-1100-52-570900-) Data Processing Equipment  
GL account available budget: \$1,484.56  
X 101 0000 52100 521 1100 52 Clear ⚠

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.

✓ Save Save and Add Item Cancel  
100%

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.**

Allocations (1)  
Allocation Codes Remove All

Delete GL Account

X E (101-0000-52100-521-1100-52-570900-) Data Processing Equipment  
GL account available budget: \$2,000.43

#### D. Optional Details Section

Click on “Optional Details” and enter the bid number in the “Bid” box, if applicable.

Optional Details

Manufacturer

Manufacturer Item Number

Bid

Department\*  
(521) Finance-Accounting & Budgeting ... View

Fixed Asset  
No

Employee

Work Order ... View

Work Order Task

#### E. Releasing the Requisition

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

Release

My Approvals

Activate

Actions/ Approvers

Workflow

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

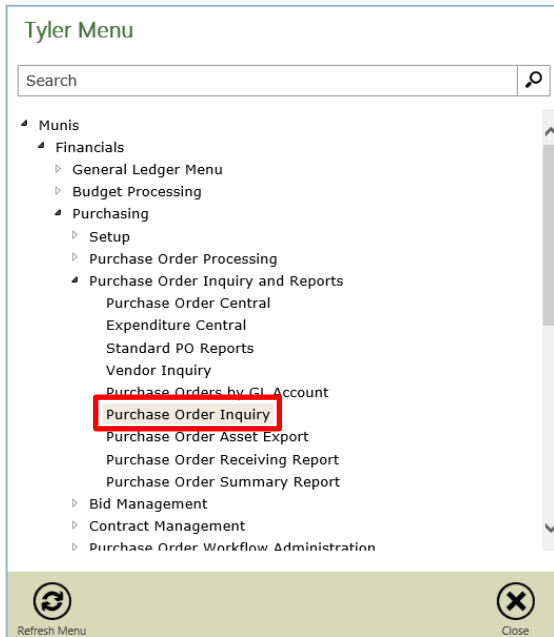
Release Requisition?

Are you sure you want to release the current requisition into workflow?

OK Cancel

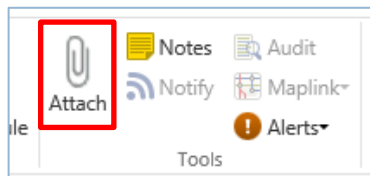
This will forward the PO request to the finance department. You will receive an email typically within 2 hours that the PO request has either been approved or rejected. If the requisition was rejected, refer to “Rejected Purchase Order Requisition” instructions.

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.

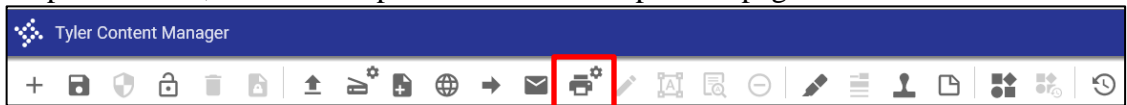


Attachment Documents			
Attachment Type	Document Type	Read Only	Count
PO Attachment	PO Attachment		0

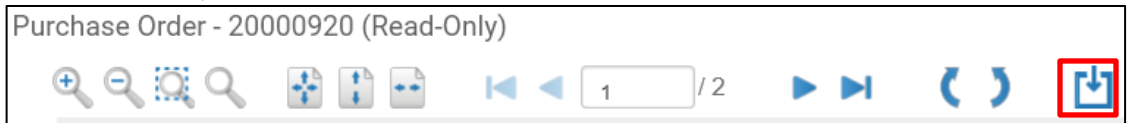
  

Associated Documents			
Document Title	TCM Document Type	Read Only	Count
PO Attachments	PO Attachment		0
PO Receivable	PO Receivable	✓	0
Purchase Order	Purchase Order	✓	1
Purchase Orders	Purchase Order		0
Requisition Attachment	Requisition Attachment	✓	0
Student Activity Purchase Order	Student Activity Purchase Order	✓	0

To print the PO, click on the printer icon at the top of the page.



To save the PO, click on the “down arrow” icon.



Click on the arrow beside “Save”, select “Save as”, select the folder where it needs to be saved, and click “Save”.

