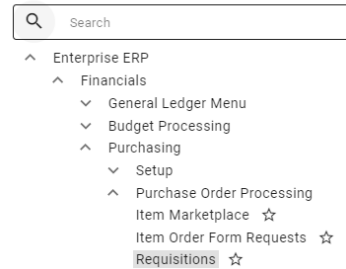


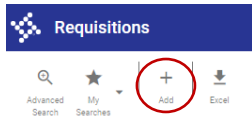
Tyler Topic: Requisitions

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

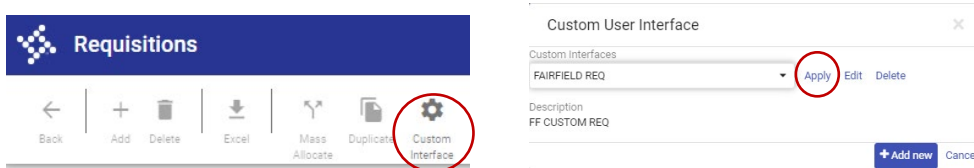
Tyler Menu



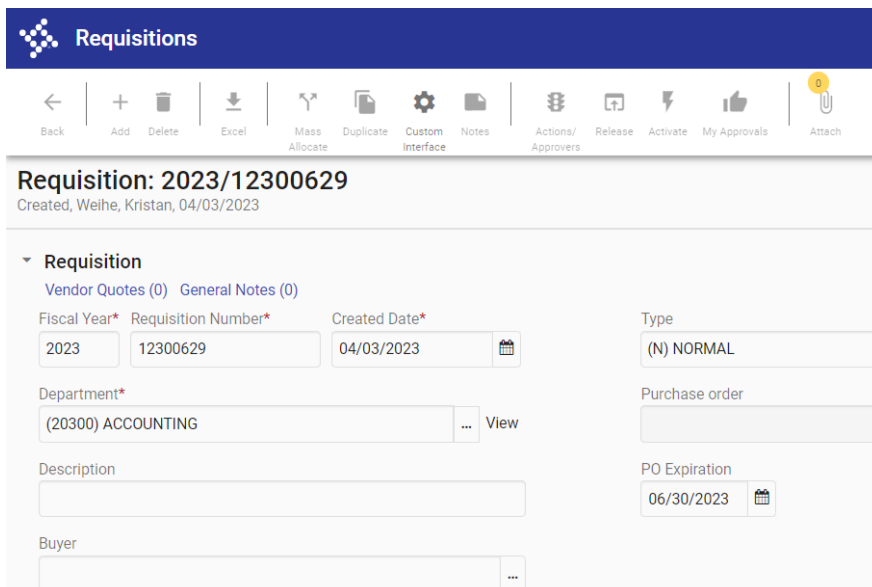
2) On the toolbar, click the Add + button.



3) If this is the first time the user is entering Requisitions, click on the Custom Interface button on the toolbar. Select Fairfield Req from the Custom Interfaces drop down and click Apply. A user will only have to do this once and the setting will be saved in Munis going forward.



4) The system will automatically fill in the year (current fiscal year), Requisition Number, Created Date, and the Department (based on user default), Type & PO Expiration Date.



5) Fill in the below fields:

Year: Leave as default unless creating for a future fiscal year.

Requisition Number: Tab through – do not change.

Created Date: Tab through – do not change.

Department: This will default to the users home department, but can be updated based on the desired workflow.

Description: Enter a description of the goods or services.

Buyer: Optional field – can enter the main contact for the purchase/service.

Type: Leave as Normal, unless a special circumstance.

Purchase order: Greyed out, the system will assign this.

PO Expiration: Defaults to the end of the current fiscal year. Update this to the end of the contract/project period if this is for a service.

Project Accounts Applied: This can be left as checked.

Receive by Amount: Leave unchecked.

6) Scroll down and click on the down arrow to show the User Defined Fields (3).

The first field is required and needs to be filled in based on the procurement process. If there is an associated Council Resolution, enter the Resolution number in the 2nd Field under Council Resolution #.

User Defined Fields (3)						
Field	Name	Required	Maxlength	Type	Value	Comment
1	PROCUREMENT METHOD	Yes	1	Code	(R) COUNCIL RESOLUTION	ATTACH PROCUREMENT METHOD DOCUMENTATION
2	COUNCIL RESOLUTION #	No	8	Character	2023-123	PLEASE ENTER YOUR COUNCIL RESOLUTION NUMBER

The 3rd field for Resolution Source Dept is specific to certain departments. If this does not apply, leave this field blank.

- (B) BM REQS FOR OTHER DEPARTMENTS
- (H) HR REQS FOR OTHER DEPARTMENTS
- (I) IT REQS FOR OTHER DEPARTMENTS

7) Click Save in the bottom right corner once all field are entered. A red Error will show in the bottom right if one of the required fields was not entered.

8) Click on Add Item under the Items section.

Items (0)

[Add Item](#)

No requisition items exist.

9) The below screen will appear to enter the Item Details.

Requisitions KW

Requisition: 2023/12300629 Total Cost: \$0.00
Created, Weihe, Kristan, 04/03/2023

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

Replenish Inventory

Item: [View](#)

Contract: [View](#)

Pick Ticket Purchase

Description*:

Vendor: [View](#) [New](#)

Quantity:

Unit Price: Unit of Measure:

Discount Percent:

Freight Amount:

Credit Amount:

Line Item Total:

Ship to*:

E-mail:

Fill out the below fields:

Item: Tab through.

Contract: Tab through (if Requisition is associated with a Contract, see separate Instructions for Creating a Requisition with a Contract).

Description: Enter a description of the goods or services.

Vendor: Enter the vendor number, the 3 dots on the right can be used to lookup up the correct vendor or you can start typing the vendor name and the system will give available options that match that vendor.

Ship to: Choose a Ship to address based on the department/division.

Email: Enter the contact person's email address. This will show on the PO printout if sending the PO to a vendor.

Quantity: Enter 1 as the quantity.

Unit Price: Enter the entire amount of the purchase (including sales tax and fees, shipping can also be included here if it is easier). Leave the Unit of Measure as Each.

Discount Percent, Freight Amount, Credit Amount: Enter if applicable, but will usually be left as 0.

Line Item Total: Will automatically calculate based on the above inputs.

10) Click on Add Allocations under the Allocations section.

Allocations (0)

[Add Allocation](#) [Allocation Codes](#)

No allocations exist.

11) Click on Enter GL account to type in the account code.

Allocations (1)

[Allocation Codes](#) [Remove All](#) [Budget Summary](#)

Delete	Project String	PS budget code	GL Account	GL Budget code	Percent	Amount
<input checked="" type="checkbox"/>	Enter project string...		<input type="text" value="Enter GL account..."/>		100.000	\$35,000.00

If the entire purchase is to be allocated to one account code, then hit Save after entering. If it is to be split amongst different account codes, change the Percent or Amount and hit tab to open up another Allocation line and enter another GL account. In this example, the cost was split 50/50 between two account codes.

Allocations (2)		Allocation Codes		Remove All		Budget Summary	
Delete	Project String	PS Budget code	GL Account	GL Budget code	Percent	Amount	
✖	Enter project string...		E (10160100-9406-) CAP OUTLAY-TRANSPORT EQ >\$5000 GL account available budget: \$0.00 Amount will exceed available account budget (override permission)	A	50.000	\$17,500.00	
✖	Enter project string...		E (10145100-9406-) CAP OUTLAY-TRANSPORT EQ >\$5000 GL account available budget: \$0.00 Amount will exceed available account budget (override permission)	A	50.000	\$17,500.00	
					Totals:	100.000	\$35,000.00

12) If multiple items need to be entered on one Requisition, click Save and Add Item and repeat Steps 9-11 until all Items are entered. In this example, I added a truck for \$35K as Line Item 1, and a warranty for \$5K as Line Item 2 for a Total Cost of \$40K.

Requisition: 2023/12300629
Created, Weihe, Kristan, 04/03/2023 Total Cost: \$40,000.00

Item Details
Add Item Delete Item Notes (0) Line 2 -

Replenish Inventory

Line 1 - NEW FORD F-150 TRUCK, 1.00, EACH, \$35,000.00
Line 2 - FORD WARRANTY, 1.00, EACH, \$5,000.00

Item: FORD LINCOLN FAIF ... View + New

Contract: ... View

3050 AUTO MALL CT
FAIRFIELD, CA 94534-4184

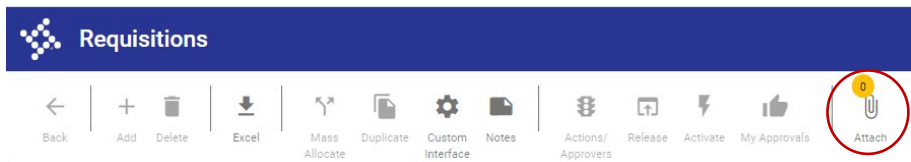
Ship to*
(AUTO) AUTOMOTIVE MAINT SHOP

AUTOMOTIVE MAINT SHOP
420 GREGORY STREET
Fairfield, CA 94533

E-mail: kwelhe@fairfield.ca.gov

Quantity: 1.00
Unit Price: \$5,000.00000 Unit of Measure: EACH
Discount Percent: 0.00
Freight Amount: \$0.00
Credit Amount: \$0.00
Line Item Total: \$5,000.00

13) Once all Items are entered, hit the Back arrow in the top left corner to go back to the main Requisition page. Click on the Attach Paperclip Icon to attach documents in TCM.



14) Click on Requisition Attachment.

Defined Mappings

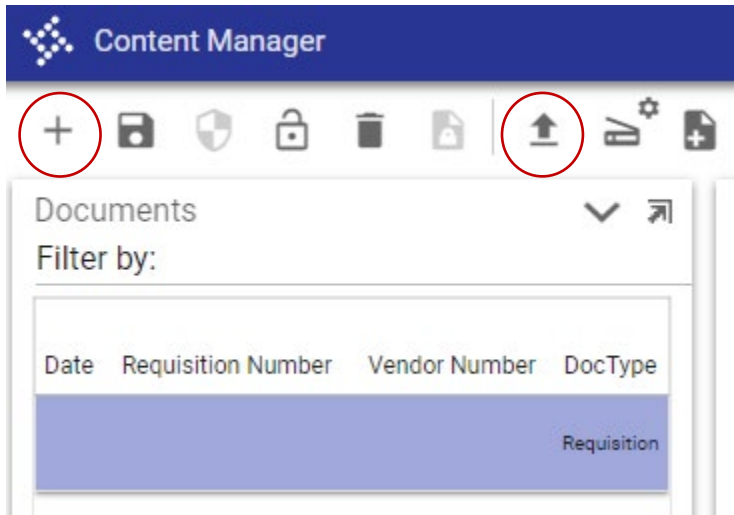
Attached Documents

Mapping Name	Description	Count
Requisition Attachment	Requisition Attachment	0

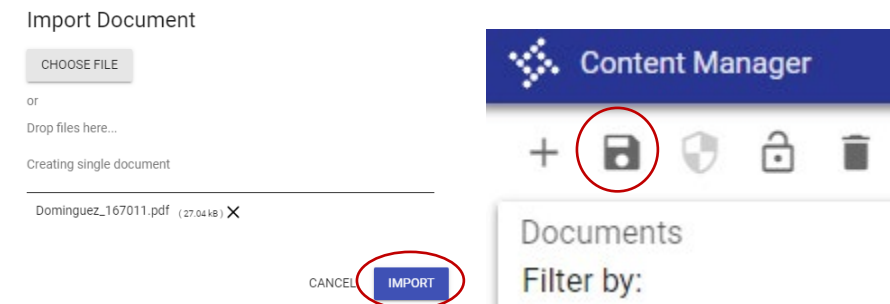
Associated Documents

Mapping Name	Description	Count
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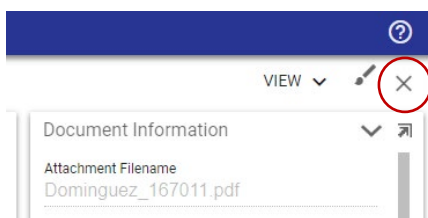
15) Click the + button to Add a New Document, then the Up Arrow Button to Import Attachment.



16) Choose or drag and drop a file in and click Import. Click the Save icon in the top left to save the documents in TCM.



17) Click the X in the top right corner to exit TCM. Do not close out of the Google Chrome tab.



18) The Requisition Attachment Count should update to 1 when the document was saved. Click Save to close out of this window.



19) To release the Requisition, click on the Release icon on the Toolbar.

Requisitions

Back Add Delete Excel Mass Allocate Duplicate Custom Interface Notes Actions/ Approvers **Release** Activate My Approvals Attach

Requisition: 2023/12300629
Allocated, Weihe, Kristan, 04/03/2023

▼ **Requisition**
Vendor Quotes (0) General Notes (0)

Fiscal Year* 2023 Requisition Number* 12300629 Created Date* 04/03/2023 Type (N) NORMAL Project Accounts Applied Receive by Amount

Department* (20300) ACCOUNTING View Purchase order

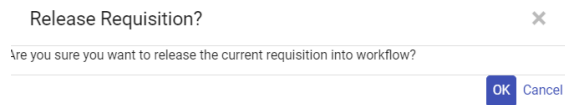
Description NEW FORD F-150 TRUCK PO Expiration 06/30/2023

Buyer (kweihe) Weihe, Kristan

▼ **Items (2)**
Add Item

Delete	Line	Description	Qty	UOM	Unit Price	Line Total	Project String	GL Account
✗	1	NEW FORD F-150 TRUCK	1.00	EACH	\$35,000.00000	\$35,000.00		E (10160100-9406) CAP OUTLAY-TRANSPORT EQ >\$5000
✗	2	FORD WARRANTY	1.00	EACH	\$5,000.00000	\$5,000.00		E (10160100-8418) COMPUTER CONTRACT MAINTENANCE

20) Hit OK when the below message pops up.



The status should show as Released in the top left corner.

Requisitions

Back Add Delete Excel Mass Allocate Duplicate Custom Interface Notes Actions/ Approvers **Release**

Requisition: 2023/12300629
Released, Weihe, Kristan, 04/03/2023

21) To view where the Requisition is going in Workflow, click on the Actions/Approvers Stoplight icon in the Toolbar.

Requisitions

Back Add Delete Excel Mass Allocate Duplicate Custom Interface Notes **Actions/ Approvers** Release

22) This will show all the Workflow steps as well as where the Requisition is in the approval process (Status will say Current at the current step, Queued for future steps, and Complete for completed steps).

Workflow Approval ✕

Steps

- ▼ Step 10 - Approvers (4)
 - Nuval, Jesadelle
 - Rendon, Ruth
 - Garcia, Kelly
 - Guitron-Castro, Karen
- ▼ Step 20 - Approvers (3)
 - Christianson, Shawn
 - O'Gara, Sean
 - Andrade, Chris
- ▼ Step 25 - Approvers (1)
 - Dixon, Myles
- Step 30 - Approvers (2)
- Step 40 - Approvers (2)

REQ

Step Details

Approval Type	Step
Segment and Amount	10
Action	Status
Approve	Current
Active Date	Action Date
04/03/2023 1:53:00 pm	N/A
Comment	
Checklist	
All Approvers Required	
No	
Key	
REQ 2023 12300629 INBOX	
Information	
20300 40000.00 FORD LINCOLN FA	

[Cancel](#)

23) To Search for an existing Requisition, go back to Requisitions from the Tyler Menu. If you know the Requisition number, enter it directly in the Search bar. If not know, click on Advanced Search magnifying glass icon. The below screen will appear.

Advanced Search My searches: ✕

Startup search

[Clear search criteria](#)

Fiscal Year	Requisition Number	Created on	Entered by
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Status	Needed by	Bid	General Commodity
Choose status <input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Department	Purchase Order	Receive by	Item
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Vendor	Work Order	Buyer	
<input type="text"/>	<input type="text"/>	<input type="text"/>	
Contract			
<input type="text"/>			
Project String	<input type="text" value="E"/> <input type="button" value="CLEAR"/>		
GL Account	<input type="text"/> <input type="button" value="CLEAR"/>		

You can search by a variety of fields, the easiest probably being the Department, Entered By, or Vendor fields. You can also Save a Search if you need to come back to it frequently using the Save button in the bottom right corner, and entering a name for the Search.

