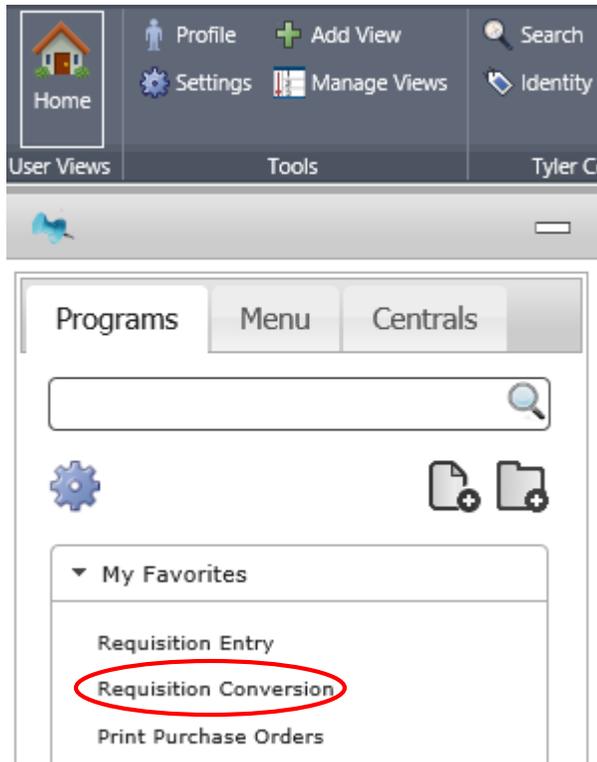


How to Convert Requisitions to Purchase Orders and Print Purchase Orders

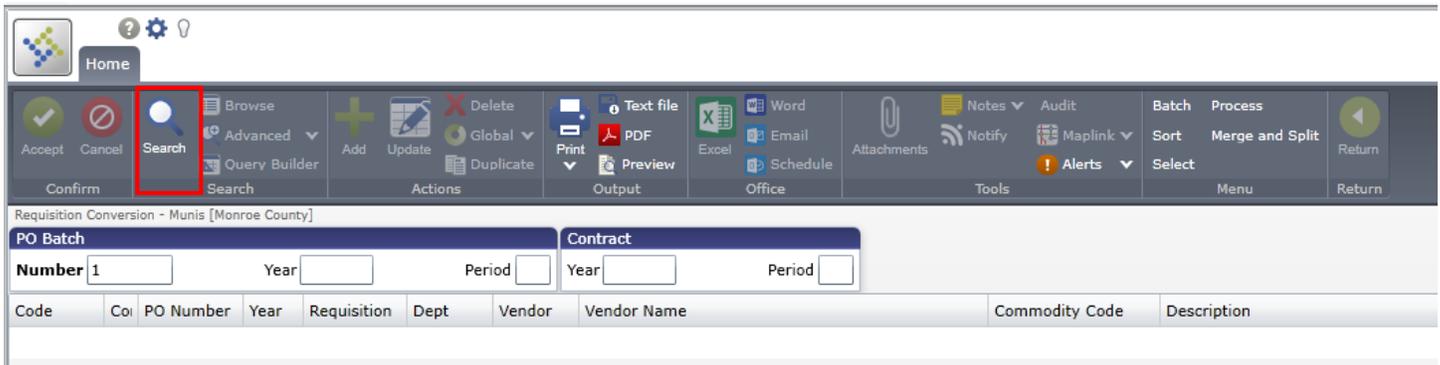
Monroe County, WI



To convert Requisitions to Purchase Orders, select **Requisition Conversion** from your Programs or Menu options on your Home screen.



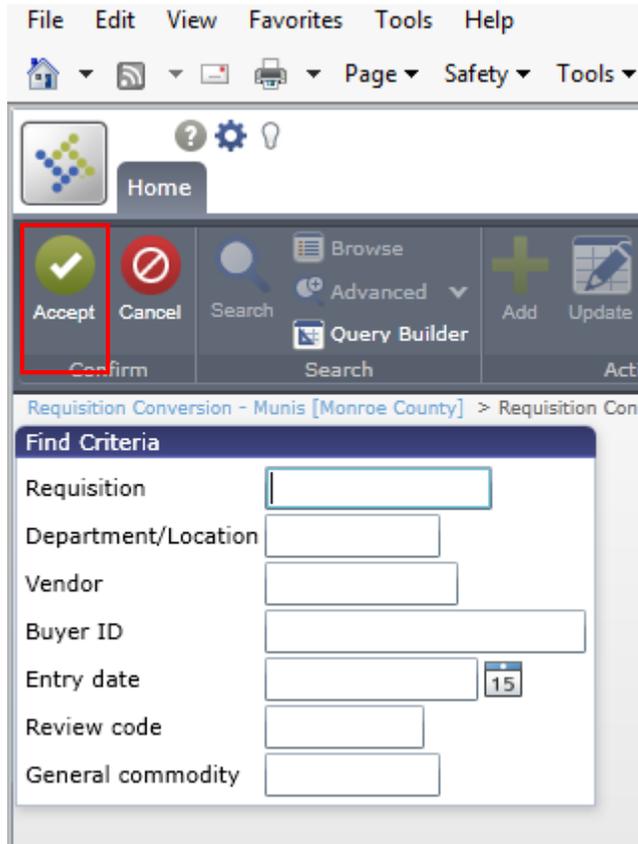
Your screen will appear similar to that shown below. Click on the **Search** icon from your dashboard.



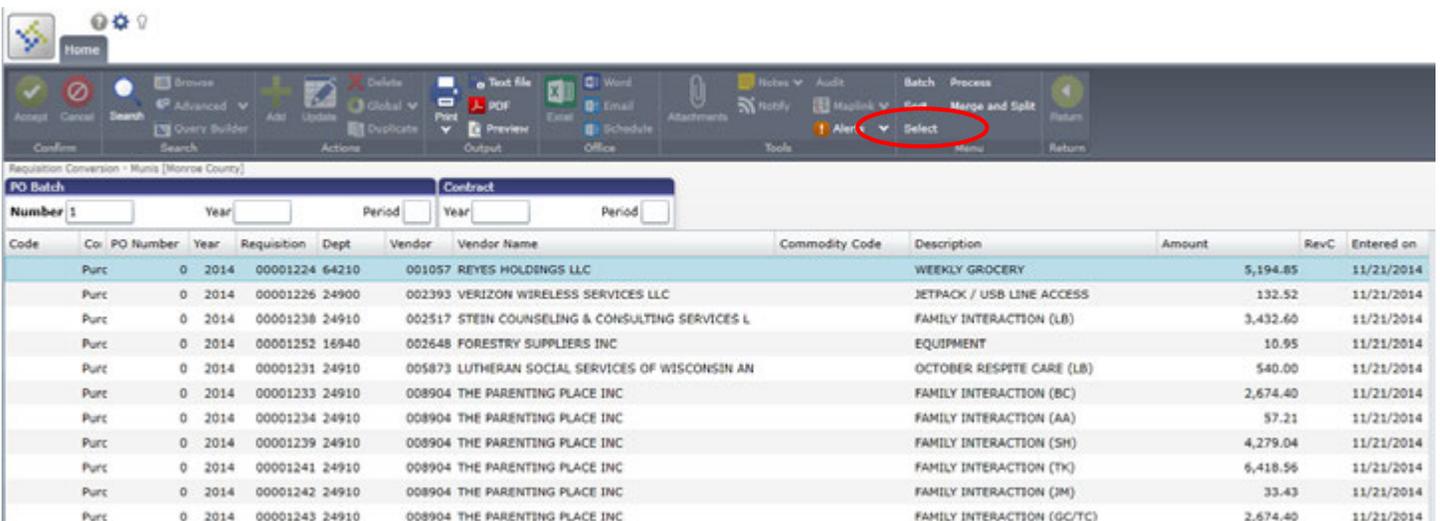
Your screen will appear similar to that shown below. Click the **Accept** icon from your dashboard ribbon.



icon from your dashboard ribbon.



Your screen will populate with data similar to that shown below. Click on **Select** from your dashboard ribbon.



You can then choose from the drop down list to **Approve**, **Reject** or **Export** each item.

Leaving the field blank will leave that item unprocessed.

Requisition Conversion - Munis [Monroe County]

PO Batch

Number Year Period

Code	Col	PO Number	Year	Requisition	Dept
▼	Purc	0	2014	00001224	64210
Approve	Purc	0	2014	00001226	24900
Reject	Purc	0	2014	00001238	24910
Export	Purc	0	2014	00001252	16940
	Purc	0	2014	00001231	24910
	Purc	0	2014	00001233	24910
	Purc	0	2014	00001234	24910
	Purc	0	2014	00001239	24910
	Purc	0	2014	00001241	24910
	Purc	0	2014	00001242	24910
	Purc	0	2014	00001243	24910
	Purc	0	2014	00001227	24910

By highlighting a Requisition and selecting **View Requisition** from the dashboard ribbon, you can open the Requisition for detailed review. *(This step is optional)*

Requisition Conversion - Munis [Monroe County]

PO Batch

Number Year Period

Contract

Year Period

Code	Col	PO Number	Year	Requisition	Dept	Vendor	Vendor Name	Commodity Code	Description
Approve	Purc	0	2014	00001224	64210	001057	REYES HOLDINGS LLC		WEEKLY GROCERY
Approve	Purc	0	2014	00001226	24900	002393	VERIZON WIRELESS SERVICES LLC		JETPACK / USB LINE ACCESS
Approve	Purc	0	2014	00001238	24910	002517	STEIN COUNSELING & CONSULTING SERVICES L		FAMILY INTERACTION (LB)
▼	Purc	0	2014	00001252	16940	002648	FORESTRY SUPPLIERS INC		EQUIPMENT

Your screen will appear similar to that shown below. Click on the **Return** icon to return to the Requisition selection screen for processing.



Requisition Entry - Munis [Monroe County]

Main

Dept/Loc: 16940 LAND CONSERVATION
 Fiscal year: 2014 Current
 Requisition number: 1252
 General Description: EQUIPMENT
 Status: 8 Approved
 Entered: 11/21/2014 By: 8516bmic
 Convert to: Purchase Order

Vendor

Vendor: 2648 FORESTRY SUPPLIERS INC
 Name: FORESTRY SUPPLIERS INC
 PO Mailing: 0
 Delivery Method: Print Fax E-Mail
 Address: 205 W RANKIN ST
 PO BOX 8397
 JACKSON MS 39284

Shipping and Billing

Ship To: 16940
 Address: MONROE COUNTY LAND CONSERVATIO
 820 INDUSTRIAL DR STE 3
 SPARTA WI 54656
 Ship To Email:
 Reference:
 Deliver To:
 Bill to: AD1141 MONROE COUNTY ADMINISTRATOR
 Bill to email: apclerk@co.monroe.wi.us

Once you have designated the processing code for each Requisition click **Accept**.



Requisition Conversion - Munis [Monroe County]

PO Batch: Number 1 Year Period Contract: Year Period

Code	Col	PO Number	Year	Requisition	Dept	Vendor	Vendor Name
Approve	Purc	0	2014	00001224	64210	001057	REYES HOLDINGS LLC
Approve	Purc	0	2014	00001226	24900	002393	VERIZON WIRELESS SERVICES LLC
Approve	Purc	0	2014	00001238	24910	002517	STEIN COUNSELING & CONSULTING SERVICES L
Approve	Purc	0	2014	00001252	16940	002648	FORESTRY SUPPLIERS INC
Approve	Purc	0	2014	00001231	24910	005873	LUTHERAN SOCIAL SERVICES OF WISCONSIN AN
Approve	Purc	0	2014	00001233	24910	008904	THE PARENTING PLACE INC
Approve	Purc	0	2014	00001234	24910	008904	THE PARENTING PLACE INC
Approve	Purc	0	2014	00001239	24910	008904	THE PARENTING PLACE INC

Your screen will appear similar to that shown below. Click on **Batch** from the dashboard ribbon.

The screenshot shows the software interface with the 'Batch' button circled in red on the dashboard ribbon. Below the ribbon, there are input fields for 'PO Batch' and 'Contract'. The 'PO Batch' section has fields for 'Number' (1), 'Year' (empty), and 'Period' (empty). The 'Contract' section has fields for 'Year' (empty) and 'Period' (empty). Below these fields is a table with columns: Code, Col, PO Number, Year, Requisition, Dept, Vendor, Vendor Name, Commodity Code, and Description. The table contains four rows of data:

Code	Col	PO Number	Year	Requisition	Dept	Vendor	Vendor Name	Commodity Code	Description
Approve	Purc	0	2014	00001224	64210	001057	REYES HOLDINGS LLC		WEEKLY GROCERY
Approve	Purc	0	2014	00001226	24900	002393	VERIZON WIRELESS SERVICES LLC		JETPACK / USB LINE ACCESS
Approve	Purc	0	2014	00001238	24910	002517	STEIN COUNSELING & CONSULTING SERVICES L		FAMILY INTERACTION (LB)
Approve	Purc	0	2014	00001252	16940	002648	FORESTRY SUPPLIERS INC		EQUIPMENT

Your screen will appear similar to that shown below. Enter a **PO Batch Number** (any number you choose will work), assign the **Year** and **Period**. Click **Accept**.



The screenshot shows the software interface with the 'Accept' button circled in red on the dashboard ribbon. Below the ribbon, there are input fields for 'PO Batch' and 'Contract'. The 'PO Batch' section has fields for 'Number' (1), 'Year' (2014), and 'Period' (11). The 'Contract' section has fields for 'Year' (empty) and 'Period' (empty). Below these fields is a table with columns: Code, Col, PO Number, Year, Requisition, Dept, Vendor, Vendor Name, Commodity Code, and Description. The table contains two rows of data:

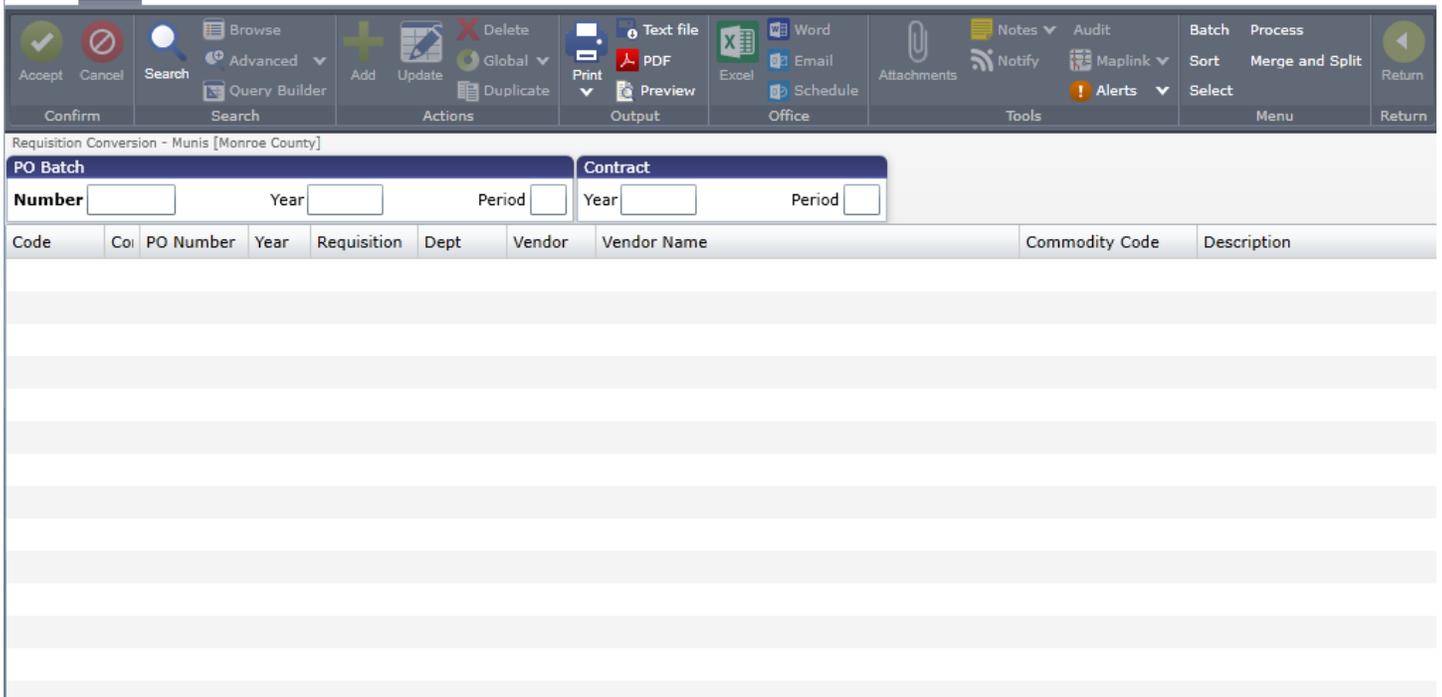
Code	Col	PO Number	Year	Requisition	Dept	Vendor	Vendor Name	Commodity Code	Description
Approve	Purc	0	2014	00001224	64210	001057	REYES HOLDINGS LLC		WEEKLY GRC
Approve	Purc	0	2014	00001226	24900	002393	VERIZON WIRELESS SERVICES LLC		JETPACK / U

Your screen will appear similar to that shown below. Click **Process** on the dashboard ribbon.

The screenshot shows the software interface with the 'Process' button circled in red on the dashboard ribbon. Below the ribbon, there are input fields for 'PO Batch' and 'Contract'. The 'PO Batch' section has fields for 'Number' (1), 'Year' (2014), and 'Period' (11). The 'Contract' section has fields for 'Year' (empty) and 'Period' (empty). Below these fields is a table with columns: Code, Col, PO Number, Year, Requisition, Dept, Vendor, Vendor Name, Commodity Code, and Description. The table contains two rows of data:

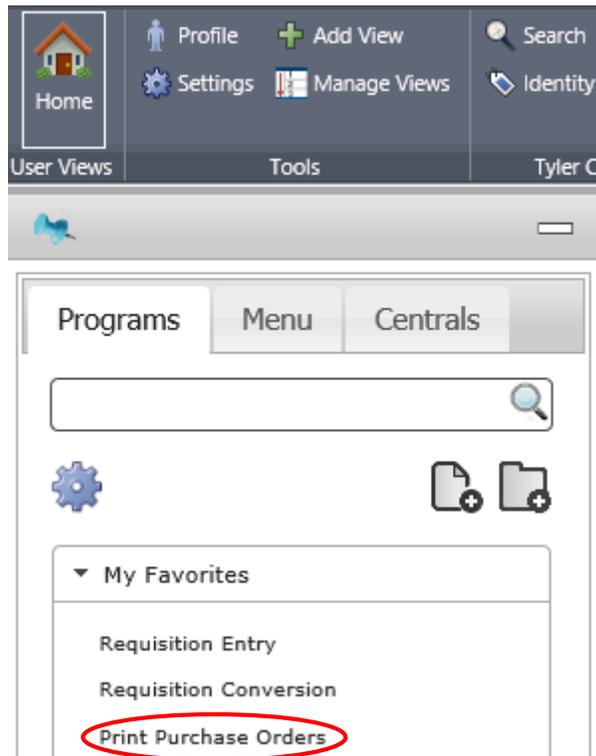
Code	Col	PO Number	Year	Requisition	Dept	Vendor	Vendor Name	Commodity Code	Description
Approve	Purc	0	2014	00001224	64210	001057	REYES HOLDINGS LLC		WEEKLY GROCERY
Approve	Purc	0	2014	00001226	24900	002393	VERIZON WIRELESS SERVICES LLC		JETPACK / USB LINE ACCESS

When the Conversion completes processing, your screen will appear cleared similar to that shown below. Any that you did not choose to process will remain until they are selected for a subsequent conversion.

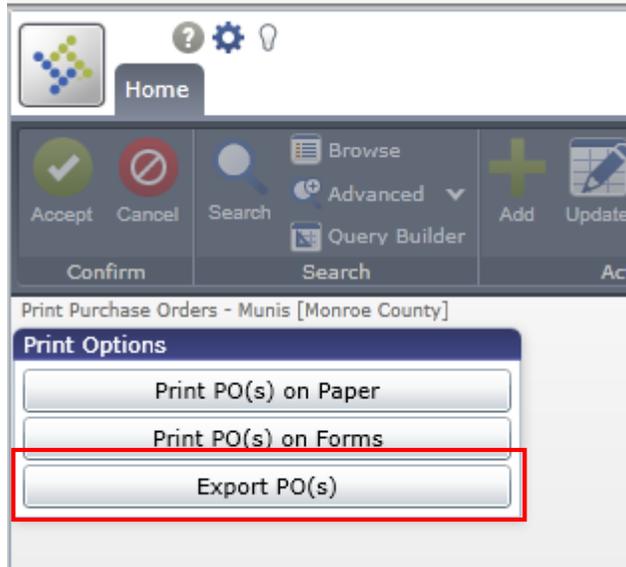


To complete PO Conversion processing, you must now Print PO's to TCM.

From your Home screen select **Print Purchase Orders** from your Programs or Menu tab.

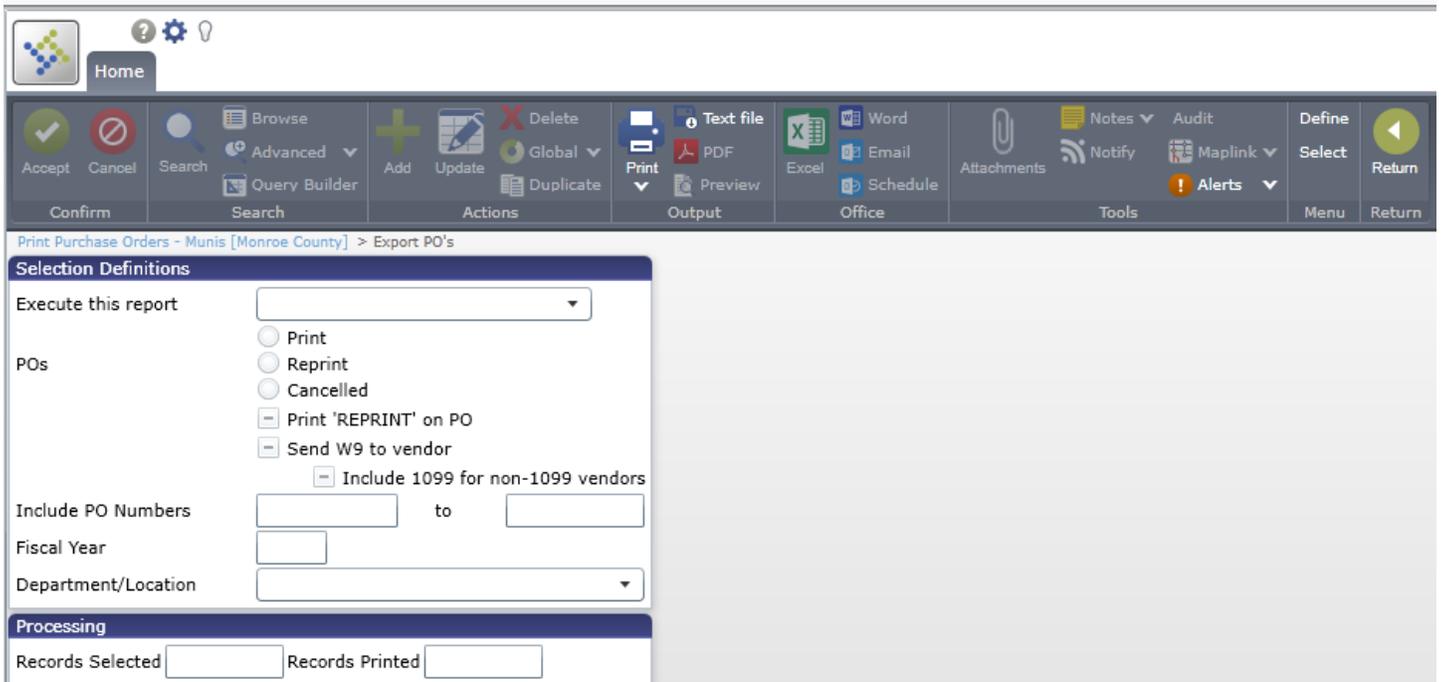


Your screen will appear similar to that shown below. Click on **Export PO(s)**.



Your screen will appear similar to that shown below.

Click **Define**.



Your screen will then appear similar to that shown below. Click **Accept**.



The screenshot shows a software interface for "Print Purchase Orders - Munis [Monroe County] > Export PO's". The "Accept" button in the top-left corner of the dialog box is highlighted with a red rectangle. The dialog box contains the following fields and options:

- Execute this report:** A dropdown menu set to "Now".
- POs:** Radio buttons for "Print" (selected), "Reprint", and "Cancelled".
- Options:** Checkboxes for "Print 'REPRINT' on PO", "Send W9 to vendor", and "Include 1099 for non-1099 vendors".
- Include PO Numbers:** Text boxes for "00000000" and "99999999" with "to" in between.
- Fiscal Year:** A text box containing "2014".
- Department/Location:** A dropdown menu.
- Processing:** A section with "Records Selected" and "Records Printed" text boxes.

Your screen will then appear similar to that shown below. Click **Select**.

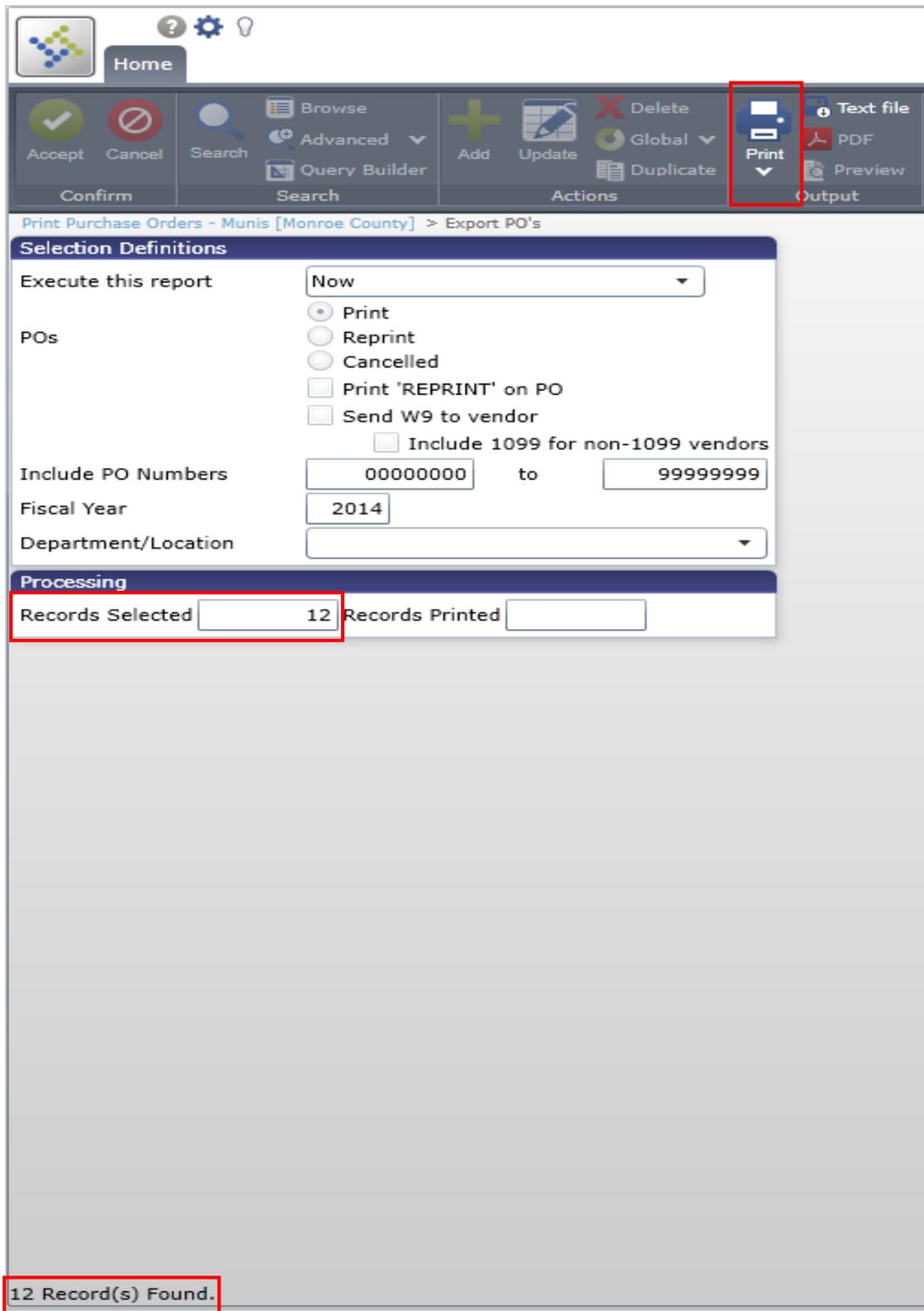
The screenshot shows the same software interface as above, but now the "Select" button in the top-right corner of the dialog box is highlighted with a red circle. The "Accept" button is no longer highlighted. The rest of the dialog box content remains the same.

You will see the number of **Records Selected** populated in two areas of this screen.

Click Print



from your dashboard ribbon.



The screenshot shows the 'Print Purchase Orders' application interface. At the top, there is a 'Home' tab and a ribbon with various action buttons. The 'Print' button is highlighted with a red box. Below the ribbon, the main content area is titled 'Print Purchase Orders - Munis [Monroe County] > Export PO's'. It contains a 'Selection Definitions' section with several fields and options, and a 'Processing' section at the bottom. The 'Processing' section shows 'Records Selected' as 12, which is also highlighted with a red box. At the bottom left, a status bar displays '12 Record(s) Found.', which is also highlighted with a red box.

Print Purchase Orders - Munis [Monroe County] > Export PO's

Selection Definitions

Execute this report: Now

POs:

- Print
- Reprint
- Cancelled
- Print 'REPRINT' on PO
- Send W9 to vendor
- Include 1099 for non-1099 vendors

Include PO Numbers: 00000000 to 99999999

Fiscal Year: 2014

Department/Location: [Dropdown]

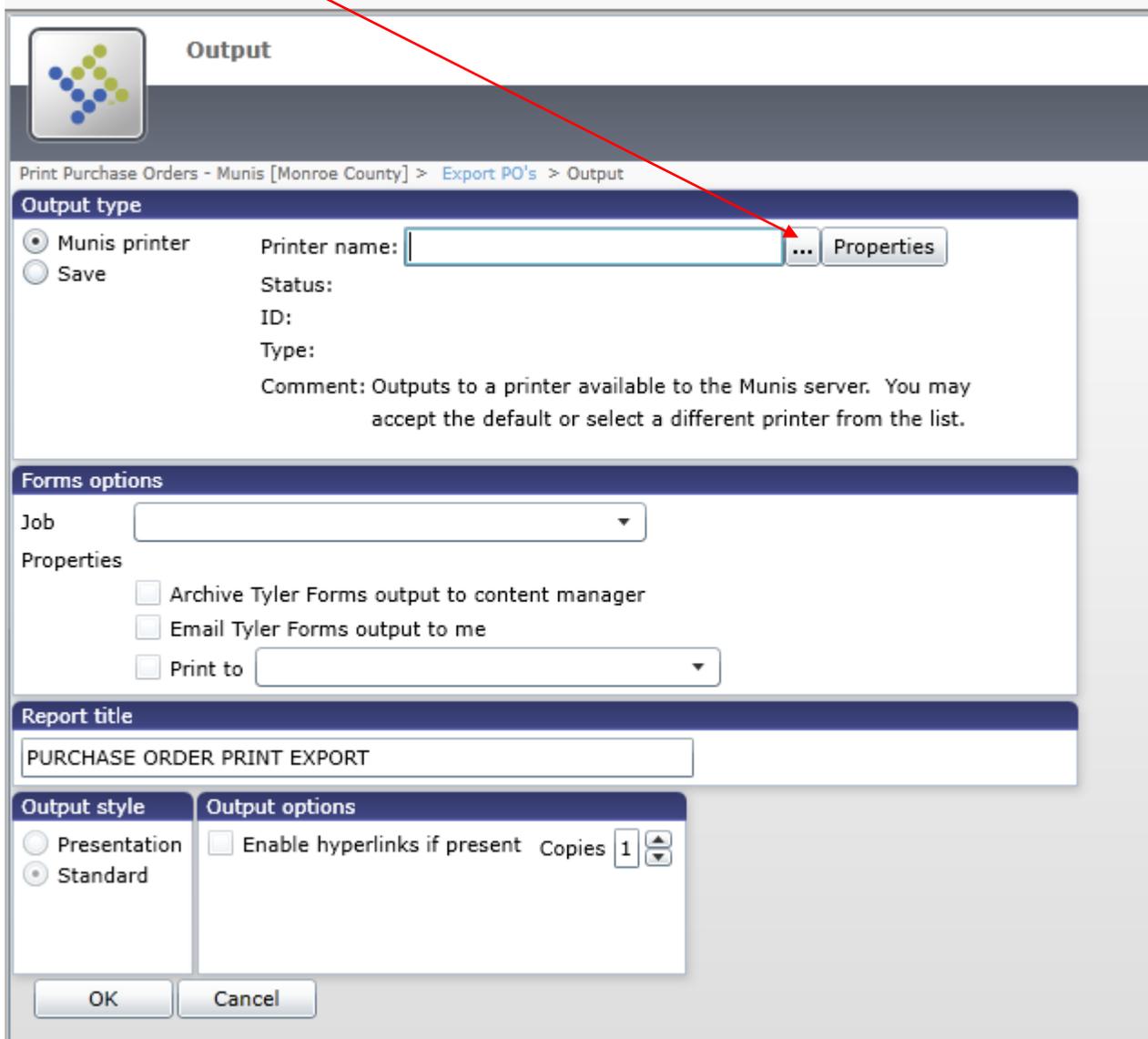
Processing

Records Selected: 12 Records Printed: [Empty]

12 Record(s) Found.

Your screen will appear similar to that shown below.

Click on the ... ellipses to get a drop down list to select the Printer Name from.



Output

Print Purchase Orders - Munis [Monroe County] > Export PO's > Output

Output type

Munis printer Printer name: ... Properties

Save

Status:
ID:
Type:
Comment: Outputs to a printer available to the Munis server. You may accept the default or select a different printer from the list.

Forms options

Job

Properties

Archive Tyler Forms output to content manager

Email Tyler Forms output to me

Print to

Report title

Output style

Presentation

Standard

Output options

Enable hyperlinks if present Copies

OK Cancel

Your screen will appear similar to that shown below. Highlight printer **POXML**.

Click **Accept**.



Print Purchase Orders - Munis [Monroe County] > Export PO's > Output > Printer Help

Name	ID	Availability	Reserved For	Type
A5D9 LABELPRT	A5D9	Available		Command
CONTRACTXML	TF03	Available		Command
DDXML	TF01	Available		Command
GUIVALID	zz	Available		Command
INVXML	TF05	Available		Command
POXML	TF04	Available		Command
RCTGB80	TF07	Available		Command
RCTMS40	TF08	Available		Command
REALAPXML	TF02	Available		Command
STMTXML	TF06	Available		Command

Your screen will appear similar to that shown below. Click **OK**.

Output

Print Purchase Orders - Munis [Monroe County] > Export PO's > Output

Output type

Munis printer Printer name: ...

Save

Status: Available
ID: TF04
Type: Command/script

Comment: Outputs to a printer available to the Munis server. You may accept the default or select a different printer from the list.

Forms options

Job:

Properties

Archive Tyler Forms output to content manager
 Email Tyler Forms output to me
 Print to:

Report title

Output style

Presentation
 Standard

Output options

Enable hyperlinks if present Copies:

Your screen will appear similar to that shown on the following page.

When processing is complete the system will indicate the number of Records Printed.

The screenshot shows a software application window titled "Print Purchase Orders - Munis [Monroe County] > Export PO's". The interface includes a menu bar (File, Edit, View, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a "Home" tab and a "Selection Definitions" section. The "Selection Definitions" section contains the following fields and options:

- Execute this report: Now (dropdown)
- POs: Print, Reprint, Cancelled
- Print 'REPRINT' on PO
- Send W9 to vendor
- Include 1099 for non-1099 vendors
- Include PO Numbers: 00000000 to 99999999
- Fiscal Year: 2014
- Department/Location: (dropdown)

The "Processing" section at the bottom of the form shows:

Records Selected	12	Records Printed	12
------------------	----	-----------------	----

A red box highlights the "Records Printed" field, which contains the value 12. At the bottom of the window, a status bar displays "Processing PO: 14000939", also highlighted with a red box.

When processing is complete the system will indicate the last PO Number issued.

You have now completed the Requisition Conversion and PO Print processes.