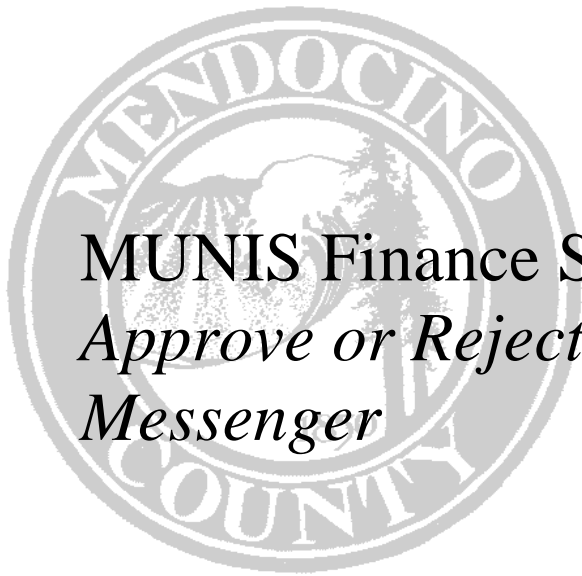


COUNTY OF MENDOCINO

Draft




MUNIS Finance System
*Approve or Reject a Requisition Using
Messenger*

Created by:
General Services Agency
May 2007 – v1

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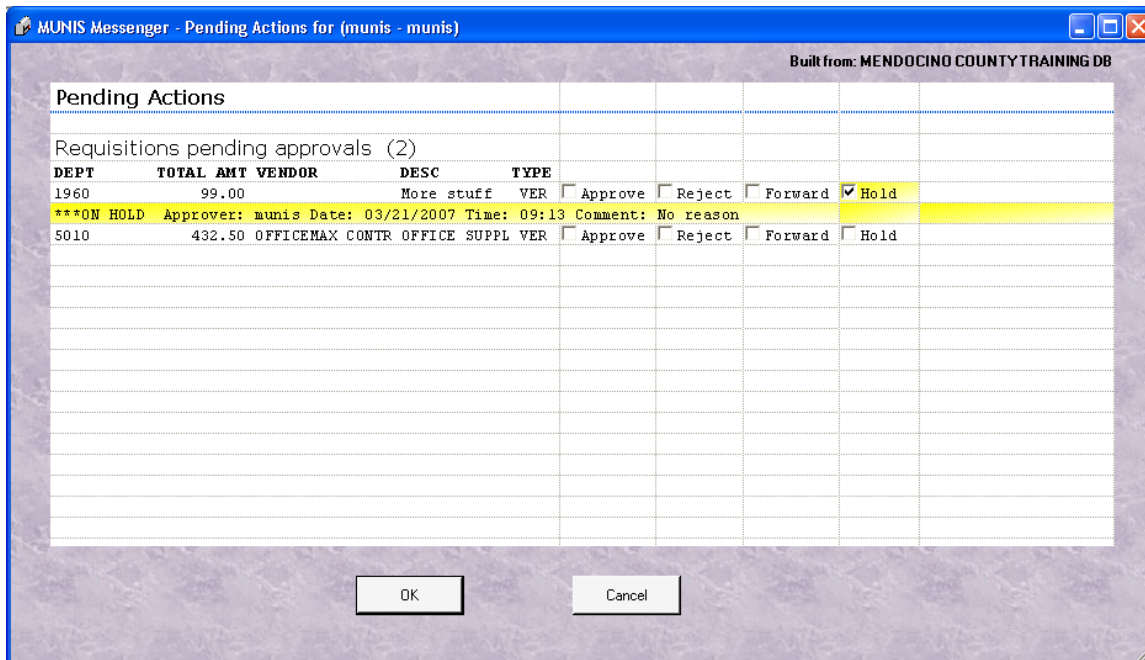
HOW TO APPROVE/REJECT A REQUISITION USING MUNIS MESSENGER

Mendocino County will be using MUNIS Messenger for all approval processes. The Messenger icon  should open automatically and appear in your taskbar whenever Windows is started (if not, please see your system administrator). You will also need to have the MUNIS client running on the desktop but you do not have to be working within MUNIS to use the Messenger program.

1.0 Approving a requisition

When a requisition is released, the designated approver(s) are notified, via the flag on their mailbox, that a requisition was created and is pending an action.

- 1.1 Right click on the Messenger icon and select View Current. All requisitions awaiting the user approval will be displayed.

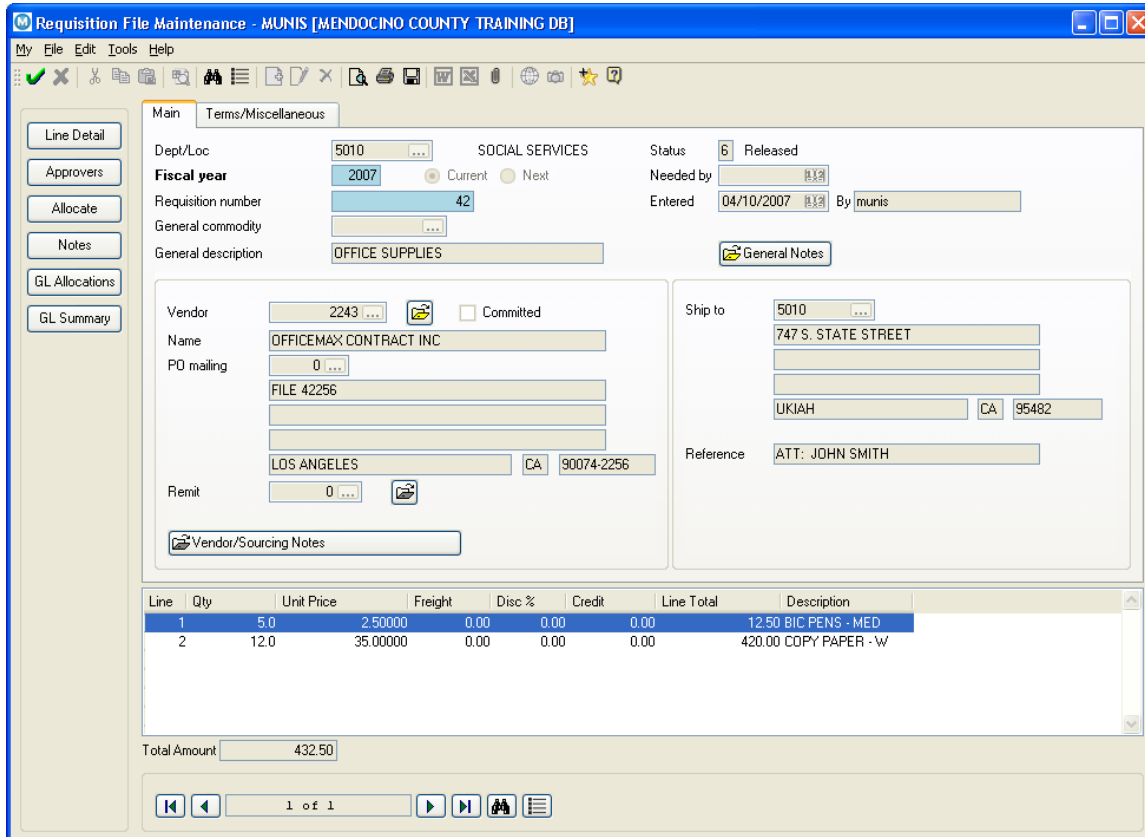


This screen will display the Dept, total Amount, Vendor Name and a brief Description.

- 1.2 To view a requisition, click on any of the fields in the line. The Requisition Entry Screen will then be displayed.

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View the information on the requisition.

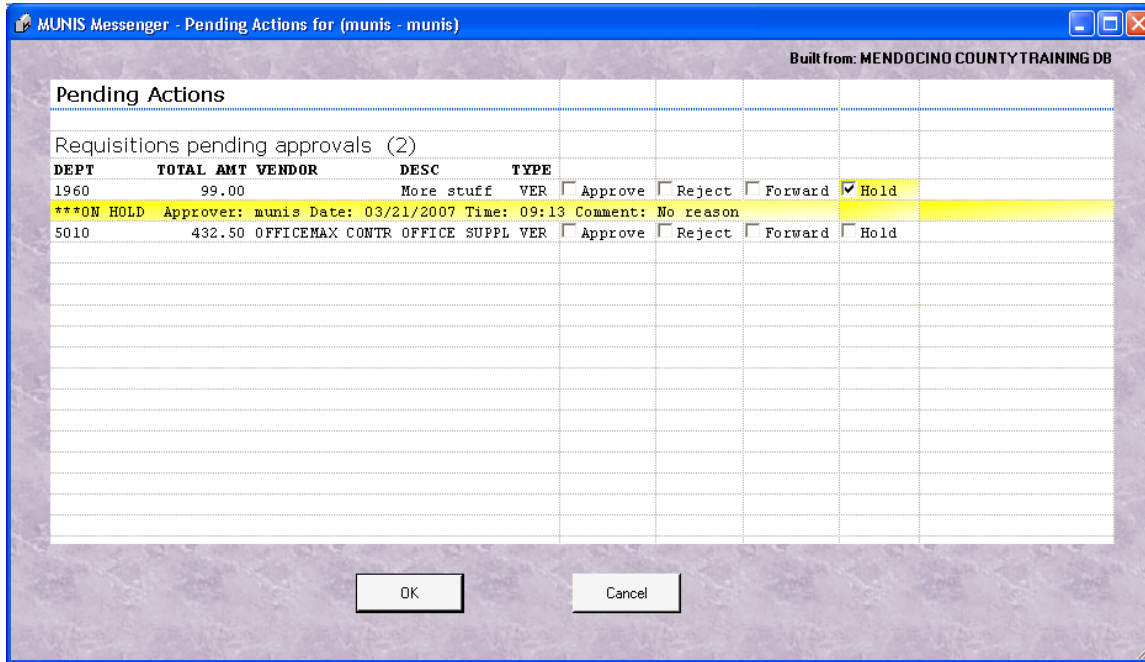
1.3 Choose LINE DETAIL from the side menu to view the individual line items.

1.4 Choose GL ALLOCATIONS to see a list of all the GL accounts used on this requisition

1.5 To return to the Header Screen choose FILE, EXIT.

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1.6 Check one of the following:

Approve - approves the requisition, if the requisition requires a single approver, then this approval turns the requisition status to 8-approved (requisition is then ready for conversion). If multiple approvers are necessary, this approval will send the requisition to the next approver, and will remain status 6 until the final approval level.

Reject - rejects the requisition. A screen will display and the reason for the rejection must be noted (i.e. Wrong GL account, use xxx-xxx)
An e-mail notification will be sent to the originator, alerting that the requisition was rejected and why. The department will be able to access this note by bringing up the requisition and make corrections.


Hold – The system will hold the requisition. It will remain on this screen until processed as approved or rejected.

Forward – A screen will display with a drop down so you can select another approver to forward the requisition to. There is also a space to note the reason you are forwarding the item

Note: You can also right click on a line item and get a drop-down menu which gives you the same options.

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1.7 Choose the OK  tool button to process the Approvals, Rejections and Holds.

NOTE: Once Departmental Approval is made the Requisition will be routed to the County's buyer for conversion to a purchase order.

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