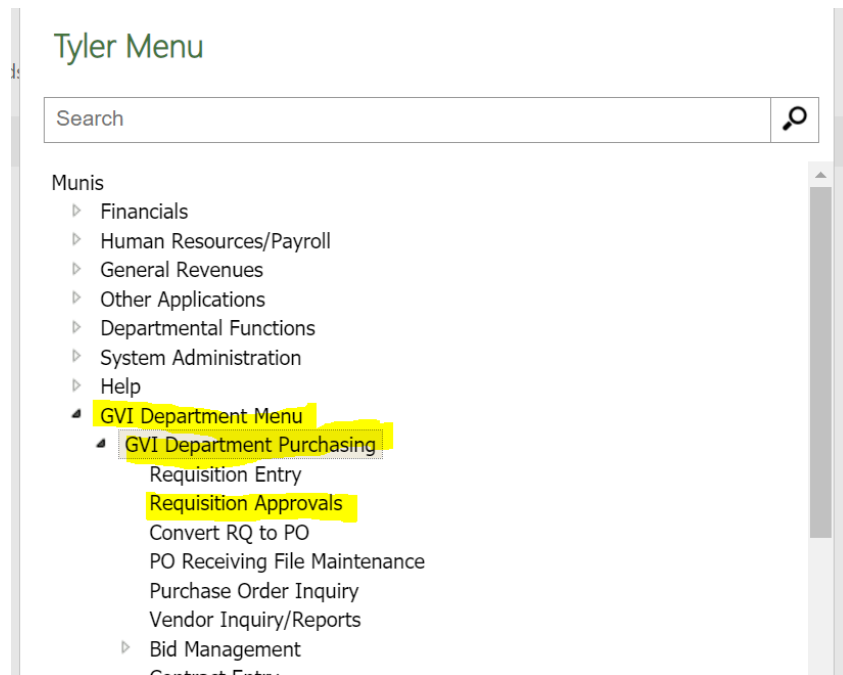


Using Workflow with Tyler Dashboard

Approval Programs

Requisitions and Invoices have separate approval programs that can be utilized for reviewing and approving these items. All the applicable items for approval will be displayed upon opening the program.

To open the Requisitions Approval program see the following:



Click on the item for review then click the Select option on the ribbon to enable the drop-down menu for the Code field.

Requisition Approvals - Munis [Gov't of the U.S. Virgin Islands - TRAIN]

Code	Year	Req #	Process	Entered by	Description	Type	Amount	RevC	Comment	Vendor	Vendor Name	Requisition Date	Buyer ID
2021	00012709	REQ	6036kimchristopher	AUTOMOTIVE VEHICLES AND RELATE	AMT	63,960.00	I	LOC		57793	CARIBBEAN AUTO MART	05/04/2021	6036dynwilliams
Hold	2021	00013870	REQ	6036bpinkett	OFFICE SUPPLIES, GENERAL	AMT	3,412.25	I	LOC	16875	UNIVERSAL BUSINESS SUPPLIES	05/18/2021	6036dynwilliams
Hold	2021	00015009	REQ	6036dijames	BRAKES REPAIR	AMT	798.36	I		3961	CASTILLO'S AUTO REPAIR	06/02/2021	6036dynwilliams
2021	00015021	REQ	6036bpinkett	FURNITURE, OFFICE	AMT	1,811.00	I	LOC		16875	UNIVERSAL BUSINESS SUPPLIES	06/02/2021	6036dynwilliams
2021	00015073	REQ	6036janthymr	EQUIPMENT MAINTENANCE, RECONDI	AMT	257.26	I	LOC		55370	TJ OCEAN AUTO II LLC	06/03/2021	6036dynwilliams
2021	00015197	REQ	6036imclariane	TIRES AND TUBES	AMT	660.00	I	LOC		18366	CENTRAL MOTOR POOL FUND	06/04/2021	6036dynwilliams
2021	00015368	REQ	6036kmcneal	Mental Health Services: Vocational, Resid	AMT	29,760.00	I	LOC		51931	GODDARD CATERING GROUP-ST.THOMAS CORP.	06/07/2021	6036dynwilliams
2021	00015388	REQ	6036epatrick	EQUIPMENT MAINTENANCE, RECONDI	AMT	1,915.00	I	LOC		59172	ATLANTIC SUPPLY	06/07/2021	6036dynwilliams
2021	00015398	REQ	6036kseger	Bottles, Glass	AMT	577.00	I	LOC		25063	FISHER SCIENTIFIC COMPANY, LLC	06/07/2021	6036dynwilliams
2021	00015537	REQ	6036ythomas	COMMUNICATIONS AND MEDIA RELATE	AMT	7,250.00	I	LOC		60374	ISLAND ANALYTICS & MARKETING, LLC	06/09/2021	6036dynwilliams
2021	00015568	REQ	6036janthymr	CLINICAL LABORATORY REAGENTS AN	AMT	12,751.00	I	LOC		21711	DE GUJA BURT, CYNTHIA	06/09/2021	6036dynwilliams
2021	00015586	REQ	6036epatrick	CLOTHING, ATHLETIC, CASUAL DRESS	AMT	660.98	I	OFIS		53212	GALLS, LLC	06/09/2021	6036dynwilliams
2021	00015593	REQ	6036kimchristopher	Hotel and Motel Accommodations, Includr	AMT	2,572.50	I	LOC		8403	WINDWARD PASSAGE HOTEL	06/09/2021	6036dynwilliams
2021	00015594	REQ	6036kimchristopher	PHOTOGRAPHIC EQUIPMENT AND SUF	AMT	6,330.00	I	LOC		60050	ECCENTRIC MOKO ENCOUNTERS	06/09/2021	6036dynwilliams
2021	00015670	REQ	6036kimchristopher	MISCELLANEOUS SERVICES, NO. 2	AMT	76.00	I	LOC		61530	MY BROTHER'S WORKSHOP, INC.	06/10/2021	6036dynwilliams
2021	00015672	REQ	6036kimchristopher	FLAGS, FLAG POLES, BANNERS, AND F	AMT	90.00	I	LOC		58588	EDGAR L. SMART, JR.	06/10/2021	6036dynwilliams
2021	00015679	REQ	6036kimchristopher	MISCELLANEOUS SERVICES, NO. 2	AMT	126.00	I	LOC		44666	ISLAND FLAVOR	06/10/2021	6036dynwilliams

This field is used to Approve, Reject, or place the item on Hold.

The screenshot shows the 'Requisition Approvals' ribbon with various action buttons: Accept, Cancel, Search, Query Builder, Add, Update, Delete, Global, Print, PDF, Excel, Word, Email, Attach, Notes, Audit, Alerts, and View Requisitions. Below the ribbon is a table of requisitions.

Code	Year	Req #	Process	Entered by	Description	Type	Amount	RevC	Comment	Vendor	Vendor Name	Requisition Date	Buyer ID
Approve	2021	00012709	REQ	6036kimchristopher	AUTOMOTIVE VEHICLES AND RELATE	AMT	63,950.00	LOC		57793	CARIBBEAN AUTO MART	05/04/2021	6036dymwilliams
Reject	2021	00013870	REQ	6036tpunkett	OFFICE SUPPLIES, GENERAL	AMT	3,412.25	LOC	Attach out of stock form	16875	UNIVERSAL BUSINESS SUPPLIES	05/18/2021	6036dymwilliams
Hold	2021	00015009	REQ	6036johannes	BRAKES REPAIR	AMT	798.36		Attach Authorization form from P&P	3961	CASTILLO'S AUTO REPAIR	06/02/2021	6036dymwilliams
	2021	00015021	REQ	6036tpunkett	FURNITURE- OFFICE	AMT	1,811.00	LOC		16875	UNIVERSAL BUSINESS SUPPLIES	06/02/2021	6036dymwilliams
	2021	00015073	REQ	6036jannmyer	EQUIPMENT MAINTENANCE, RECONDI	AMT	257.26			55370	TJ OCEAN AUTO II LLC	06/03/2021	6036dymwilliams

The View Requisitions option on the ribbon will open the Requisition Entry screen.

The screenshot shows the 'Requisition Entry' screen. It includes sections for Main Information, Vendor Information, and Shipping Information. The Main Information section shows details like Dept Loc (7012), Fiscal year (2021), Requisition number (12709), and General commodity (AUTOMOTIVE VEHICLES AND RELATED TRANSPOR). The Vendor Information section shows Vendor (57793), Name (CARIBBEAN AUTO MART), and PO mailing (4523 ESTATE CHARLOTTE AMALIE). The Shipping Information section shows Ship to (7001), Department of Health, and email (kim.christopher@doh.vi.gov). At the bottom, there is a 'Workflow' section with buttons for My Approvals, Approve, Reject, Forward, Hold, and Approvers.

Line	Commodity	Inv item	Inv item loc	Inv tran type	Description	Vendor	Qty	Unit price
1	07006401009				TO PURCHASE TWO CHEVROLET EQUINOX FOR THE MATERI	(57793) CARIBBEAN AUTO MART	2.00	31,980.00000

The item can also be approved right from this program as well using the approval buttons at the bottom of the screen.

The attachments for the requisitions can be viewed by selecting the Attach button on the ribbon.

Attachment Documents				
Attachment Type	Document Type	Read Only	Count	Required
Generic Attachment	Attachment (no searchable metadata)		1	

Associated Documents				
Document Title	TCM Document Type	Read Only	Count	
Contract Attachment	Contract Attachment		0	
Contract/Agreement	Contract/Agreement	✓	0	
PO Attachment	PO Attachment	✓	0	
Purchase Order	Purchase Order	✓	0	
Requisition Attachment	Requisition Attachment		0	

TCM Version: 2020.2.13
 Show Counts

To open the Invoice Approval program, see the following:

Tyler Menu

Search

Munis

- Financials
- Human Resources/Payroll
- General Revenues
- Other Applications
- Departmental Functions
- System Administration
- Help
- ▾ **GVI Department Menu**
 - **GVI Department Purchasing**
 - ▾ **GVI Department Accounts Payable**
 - Invoice Entry/Proof
 - Invoice Approvals**
 - Recurring Invoice Maintenance
 - Vendor Inquiry/Reports
 - Invoice Ageing Report
 - Invoice History by GL Account
 - Vendor Invoice Lists

Click on the item for review then select the Update button on the ribbon to enable the drop-down menu for the Code field. This field is used to Approve, Reject, or place the item on Hold.

Invoice Approvals - Munis [Gov't of the U.S. Virgin Islands]

HOME

Accept Cancel Search Query Builder Add Update Global Duplicate Print PDF Excel Word Email Attach Notify Maplink Alerts

Confirm Search Actions Output Office Tools Menu

Code	Process	Year	Vendor	Document	Invoice	Creator	Description	Type	Amount	Comment
API		2021	12392	2088965	102075-2101	6036gschjang	Hp LaserJet printer	SEG	5,612.00	
API		2021	22128	2089293	22304	6036gschjang	Cybersecurity Certification	SEG	3,700.00	

The View Invoices option on the ribbon will open the Invoices Entry screen for the invoice selected.

Invoice Approvals - Munis [Gov't of the U.S. Virgin Islands]

HOME

Accept Cancel Search Browse Query Builder Add Update Duplicate Global- Print PDF Excel Word Email Attach Notes Audit View Invoices Return

Confirm Search Actions Output Office Tools Alerts+ Menu

Code	Process	Year	Vendor	Document	Invoice	Creator	Description	Type	Amount	Comment
API		2021	12392	2088965	102075-2101	6036gsgsjang	Hp LaserJet printer	SEG	5,612.00	
API		2021	22128	2089293	22304	6036gsgsjang	Cybersecurity Certif	SEG	3,700.00	

Invoice Entry - Munis [Gov't of the U.S. Virgin Islands]

HOME

Accept Cancel Search Browse Query Builder Add Update Duplicate Global- Print PDF Excel Word Email Attach Notes Audit Re-Liquidate View Address Return

Confirm Search Actions Output Office Tools Alerts+ PO Inquiry Journal Info More... Menu

Invoice

Year: 2021

PO: 10242 Receiving Open amount .00 DBA: C/O ILENE GARNER

Contract: #2 JOHN'S BREWERS BAY

Vendor: 22128 UVICELL

Address: 0

Terms: ST. THOMAS VI 00802

Document: 2089293

Invoice: 22304 Description: Cybersecurity Certification

Gross: 3,700.00 Status: P Department: 3901 Separate check

Discount date: Voucher: 2191530 Work order: 0 Include documentation

Discount basis: Check Run: Allocation: 0

Discount %: .000 Amt: .00 Invoice date: 06/02/2021 Requisition: 15119

Net amount: 3,700.00 Received date: 06/10/2021 Liq method: Line

Payment method: Normal

Check/Wire: Due date: 07/02/2021

Withholding (.00)

Accounts

Line	Org	Object	Proj	PO	Inv amount	1099	A	Description	Bud	Work order	WO task
1	00394004	534110		10242	3,700.00	7	N		1		

Total: 3,700.00

Workflow

My Approvals Approve Reject Forward Hold Approvers

The item can also be approved right from this program as well using the approval buttons at the bottom of the screen.

The attachments for the invoice can be viewed by selecting the Attach button on the ribbon.

Document Mappings				
Attachment Documents				
Attachment Type	Document Type	Read Only	Count	Required
Generic Attachment	Attachment (no searchable metadata)		1	
AP Invoice	AP Invoice		0	
Associated Documents				
Document Title	TCM Document Type	Read Only	Count	
AP Check	AP Check		0	
AP Invoice	AP Invoice		0	
AP Invoice Affidavit	AP Invoice Affidavit		0	
AP Invoice Attachment	AP Invoice Attachment		0	
AP Invoice Attachment by Invoice Number	AP Invoice Attachment		0	
AP Warrant Attach	AP Invoice		N/A	
Contract Progress Payment	Contract Progress Payment	✓	0	
Purchase Card Transaction	Purchase Card Transaction	✓	0	
Purchase Order	Purchase Order		1	
Request For Check	Request For Check	✓	0	
<input type="button" value="View Documents"/> TCM Version: 2020.2.13 <input checked="" type="checkbox"/> Show Counts				