

APPROVING A REQUISITION AT-A-GLANCE

For use with the P I S D “Requisition Approval User’s Guide”

	Pages
IMPORTANT: Before you begin... This Approving A Requisition AT-A-GLANCE sheet assumes the user has a network login name and password for logging on the P I S D network. It also assumes that the user has a copy of the “Requisition Approval User’s Guide” and has read the first part titled “Navigation” (pages 2-3).	
NOTE: Requisition Approval User's Manual can be downloaded from the following website: http://www.pasadenaisd.org/purchasing/	
Accessing Lawson: Go to Lawson website: http://pisdlawson/lawson/portal/logon.htm	2
Login to Lawson using your district User ID and Password - Example: USER ID: <u>LawTrainXX</u> , PASSWORD: <u>lawtrainxx</u> (lowercase) <i>If you have a problem with your login, please contact the Help Desk @ ext. 70260</i>	2
Budget Approvers will have a special in-basket that can be assessed from the home tab on any Lawson screen. Click on the in-basket marked “Budget Holder” <ul style="list-style-type: none"> • Select "Budget Holder" from your Inbox (left hand side of your screen) <i>This will bring up a screen with all Requisitions needing your approval</i> 	3
To begin approving - Select a Requisition and click on it to display the requisition.	5
To view the contents - You can click on the Requisition tabs and move through the Requisition details (<i>Misc., Lines, Template, etc.</i>)	6
At this point you will have 3 options – <ul style="list-style-type: none"> • Approve - Click on this to approve the Requisition and have it continue on through the approval process. • Unrelease- Clicking on this option will send it back to its original status of "unreleased" and allow changes to be made. • Reject – Do not use until you have talked to Purchasing Buyer - Clicking on this option will “KILL” this requisition forever. If you “Reject” this requisition, your secretary will have to completely start over with this request. Reject status cannot be changed! 	6
Normal Approval – <ul style="list-style-type: none"> • Once you click “Approve” An approval action message box will appear asking if you want to take this action. Click “OK” • A “Dispatched Work Object message box will appear. Click “OK” . This will take you back to the in-basket. <i>(Note that the approved requisition number will no longer be listed as “needing approval”.</i> 	6
Normal Unrelease – Before clicking this option, you will need to attach a comment so the originator knows what is wrong with the requisition. <ul style="list-style-type: none"> • To add a comment Click on “Add Comments” (within the Requisition form) • A Comments page will display - Click on “Comment” • Click on "Requisition Header Display Only Comments" • Add a Title to your comment • Type in the message text (no limit on characters) • Click on Add • Click on Close (this will take you back to the Reqn.) • Click on inquire (this will change the “Add Comments” to” Has Comments”) • Once you click “Unrelease” (an approval message box will appear) Click OK • A “Dispatched Work Object” message box will appear. Click “OK” . This will take you back to the in-basket. <i>(Note the requisition number will no longer be listed as “needing approval”.</i> • Email originator to notify the requisition that it has been “Unreleased” and they need to go in Lawson and find the requisition. 	9
Reject - <ul style="list-style-type: none"> • Clicking on this option will “ KILL ” this Requisition. Once you click Reject a message box will appear asking if you want to take this action. Click OK”. • A “Dispatched Work Object” message box will appear. Click “OK” . This will take you back to the in-basket. <i>(Note the requisition number will no longer be listed as “needing approval”.</i> 	7
Repeat until your inbox is clear. When finish, log off Lawson and you are done	