

CREATING A REQUISITION AT-A-GLANCE

For Use with the PISD "LAWSON Requisition User's Training Manual" (circa Sept. 2005)

STEPS	Page #
1. Go to the rq10 screen (Requisition). This will put you into the "Header" section of the Related Pages column to the left of the screen.	3
Fill in the following fields of the "Header" section: 2. Requestor (<i>your dept. or school number</i>) 3. Company (i.e. 199) (the old fund code) 4. Requesting Location (<i>your dept. or school number</i>) 5. Deliver to (<i>optional field</i>) 6. From Company (199) 7. Ship to or Stockroom (<i>dept./school number or 815 if ordering from Warehouse</i>) 8. Requested Delivery Date (<i>need date</i>) 9. Print Requisition (Y/Yes, N/No) 10. Bid Number - optional (<i>can be found at the Purchasing Dept. website in the Yellow Pages or INV if ordering from Warehouse</i>) 11. Click Add: <i>This will generate Requisition number (make note of this number)</i>	6
12. Click on the "Miscellaneous" section of the Related Pages column (left of screen)	7
Fill in the following fields of the "Miscellaneous" section: 13. Accounting Unit (<i>use drop down arrow to select</i>) 14. Account (<i>use drop down arrow to select</i>) 15. **NEW INFORMATION – School Location (<i>Leave this field blank until further notice</i>) 16. Vendor (<i>use drop down arrow to select</i>) 17. Vendor Name (<i>should fill in when you select the Vendor field above</i>) 18. **NEW INFORMATION – Purchase From (<i>Choose the specific location address for the Vendor - this is where the Purchase Order will actually be mailed</i>) 19. Click change	7
20. Click on the "Lines" section of the Related Pages column (left of screen)	8
Fill in the following fields of the "Lines" section: 21. FC (<i>A to Add or use drop down arrow to select options</i>) 22. Item (<i>item number/description of what you are purchasing</i>) 23. Quantity 24. UOM (<i>Unit of Measure - use drop down to select options</i>) 25. Unit Cost 26. Item Description (<i>fill in if more description is needed</i>) 27. Vendor Item (<i>fill in if <u>even</u> more description is needed</i>) 28. Click change	8 & 9
29. Repeat above for each line item.	8 & 9
30. Click Release - (<i>Requisition is complete and ready for approval from your Budget Holder</i>)	10