



Pasadena ISD

Lawson Financial System

Requisition User's Manual





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1 Navigation

The Lawson system consists of web based applications that each user will be able to access from a bookmarked or a link directly from their desktop.

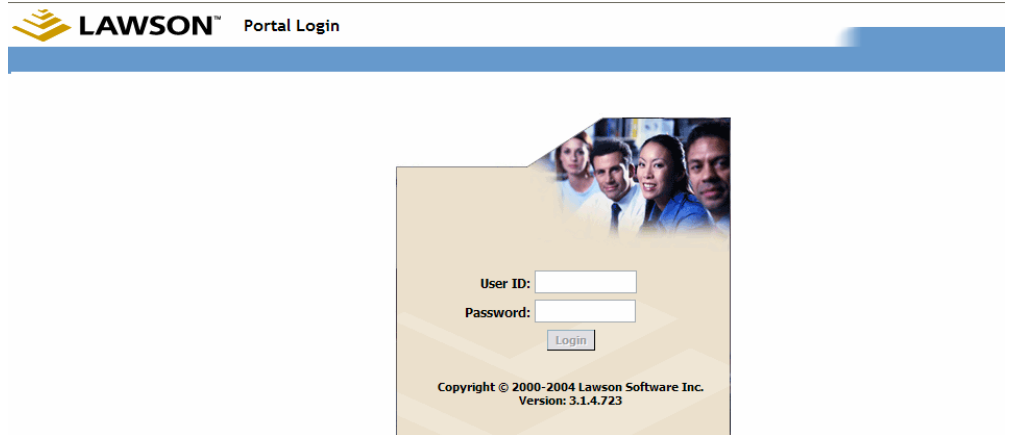
The URL to access Lawson is:

<http://pisdlawson/lawson/portal/logon.htm>

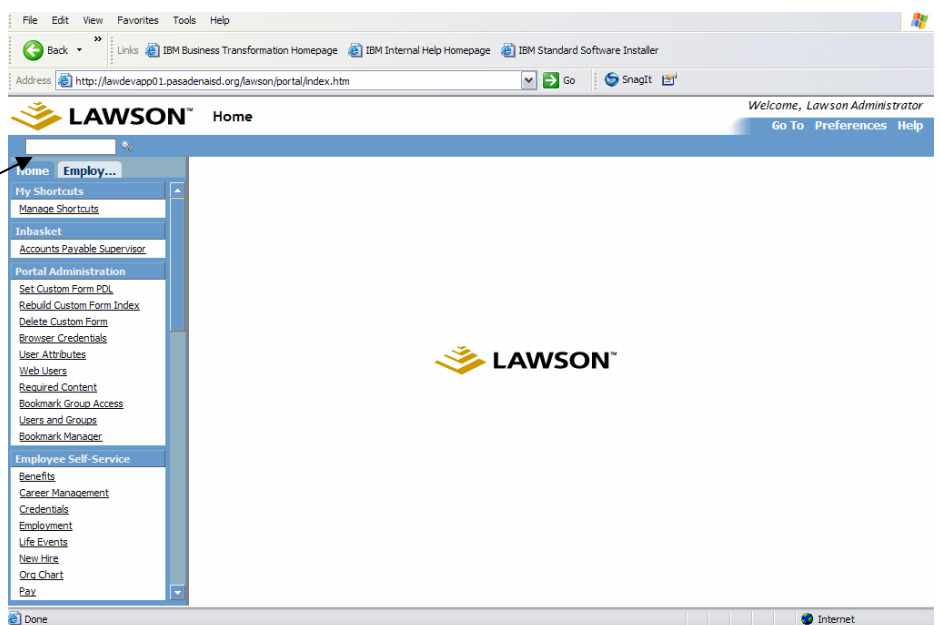
Each user will be required to enter a user name and password to access Lawson. The passwords are case sensitive and are created by the PISD Lawson System Administrator.

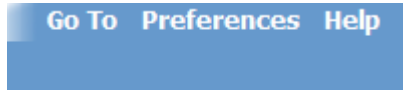
- Enter your user name and Password and click on the Login button.
- The user names and passwords are case sensitive.

Contact the PISD Technology Services Helpdesk if you experience problems logging on to the system or have issues with any of the applications. (70260)

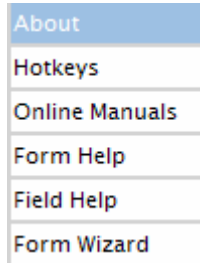


- Once the user name and password are accepted the following Lawson screen will appear.
- Users can type the form number in the navigation box in the upper left hand corner of the Lawson main form.
- Users can also type in the RQFL and POFL to access the Lawson Requisition and Purchase Order module flowcharts.





- On any Lawson form you can click Help and the following menu will appear.
- Click on the Hotkeys option will display the list of shortcuts.
- The Lawson ERP form shortcuts can be used on all Lawson forms



Action	Hotkey
Lawson Portal	
Perform Submit Action	F12
Perform Close/Cancel Action	Esc
Perform Refresh Action	Ctrl+Shift+F5
Perform Delete Action	Ctrl+Shift+D
Perform Next Action	Ctrl+Shift+N
Perform Previous Action	Ctrl+Shift+P
Perform Page Up Action	PageUp
Perform Page Down Action	PageDn
Tab Page Up	Ctrl+PageUp
Tab Page Down	Ctrl+PageDn
Position in First Field	Ctrl+Alt+F
Display Field Help	Ctrl+Shift+H
Display Form Help	Shift+F1
Display Hotkeys Help	Alt+K
Position in Navigation Bar	Shift+F7
Position in Search Box	Shift+F8
Position in Toolbar	Shift+F9
Position in Portal Menu	Ctrl+F10
Display Home Page	Ctrl+Home
Show Context Menu	Shift+F10
Lawson ERP Forms	
Open/Select Field Context	Enter
Move to Action Selection	F9
Perform Add Transaction	Ctrl+Shift+A
Perform Change Transaction	Ctrl+Shift+C
Perform Inquire Transaction	Ctrl+Shift+I
Clear To End of Form	Ctrl+Shift+K
Clear Entire Form	Ctrl+Shift+X
Clear Current Field	Ctrl+Shift+Y
Open Define Screen	Ctrl+Shift+F
Open Attachments Screen	Ctrl+Shift+T
Open Drill Screen	Ctrl+Shift+R

There is a complete list of these shortcuts in the appendix of this document.

Note: Shift+N will allow you to have more than one Lawson form accessible at any one time.

Requisition Flowchart

The Requisition module has 4 related pages.

1. **Setup** page is where the system configuration is maintained. There will be a limited number of people that have access to change or add this information. Most everyone will have access to view this information.
2. **Creation and Approve** Page is where you create your requisitions. The requisition form can be accessed by entering RQ10 in the navigation box or selecting Creation and Approval under the related pages and selecting Online Entry.
3. The **Processing** page is where you can access the status of a requisition on a vendor or the demand at the warehouse. This page is also where you process a requisition return to the warehouse and print a hardcopy of the requisition.

The screenshot shows the 'Requisitions Flowchart (RQFL.1)' interface. It is divided into three main sections: 'Setup', 'Creation', and 'Approval'.
 - **Setup**: Includes 'Required Setup' (Company Defaults, Requesting Locations, Approval Codes, Requesters) and 'Optional Setup'.
 - **Creation**: Includes 'Online Entry', 'IC Location Replenishment', 'Interface', 'Par Location RQ Entry', and 'IC Replenishment by RQ'.
 - **Approval**: Includes 'Requisition Approval'.
 A navigation box on the left shows 'Home Requis...' and 'Related Pages' with 'Setup', 'Creation and Approval', 'Processing', and 'Inquiries, Reports' listed. An arrow points from the 'Creation and Approval' section of the flowchart to the 'Online Entry' button in the 'Creation' section.



4. The **Inquiries and Reports** page makes available the following inquiry and report screens.

Inquiries, Reports

Inquiries

- Requisition
- Requisition by Location
- Requisition by Item
- Requisition Status
- Requisition Detail
- Issue History

Reports

- Requisition Status Report
- Department Usage
- Departmental Procurement Expense
- Issues Audit
- Requisition Volume Summary
- Print Requisition
- Listings
- Purge



2 Requisitions

A requisition is an on line request to buy or have issued goods and services. The requisition will go through an automated approval process where the requisition can be approved, rejected, or unreleased.

Approved: the requisition will ultimately become a purchase order.

Rejected: the requisition will have a status of rejected and will not be able to be changed to resubmit.

Unreleased: the requisition is made available to the original requester, with comments, indicating that something on the requisition should be changed and resubmitted for approval.

2.1 Create a Purchase Requisition

Creating the Requisition Header

Note: the following fields are the only required fields necessary to add a requisition header. There are a number of fields that are not required and are available to the user. However, these fields do not support any system functionality.

1. Requester: every district location will have a requester ID. This should be the location of the requester entering the requisition. Clicking on the drop down will list all the district requesters.

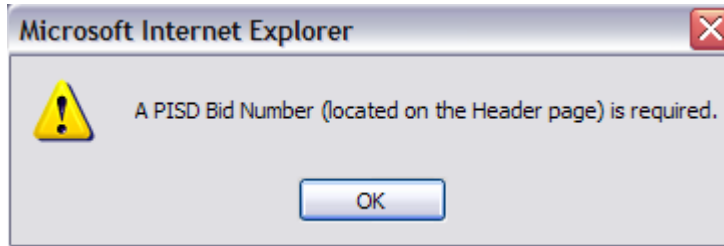
The screenshot shows the Lawson Requisition (RQ10.1) form. The 'Header' section contains the following fields: Requester (dropdown), Requisition Number (text), Company (dropdown), Requesting Location (dropdown), Deliver To (text), From Company (dropdown), Ship to or Stockroom, if Inventory (dropdown), Requested Delivery Date (calendar), Priority (dropdown), Quote Required (checkbox), Print Requisition (checkbox), PO User Field 1, 2, 3 (text), PISD Bid Number (text), PO User Date 1, 2 (calendar), User Analysis (text), and Item Entry Code (dropdown). A list of district requesters is shown on the right side of the form.

2. Requisition number: this will be a system generated number. This field should be left blank.
3. Company: this will be "199" and will default in when the user tabs through the requisition number field.
4. Requesting Location: This will default to the location of the requester. This is the budget holder location that has the first level of approval on the requisition.
5. Deliver To: this is not a required field. This can be an individuals name or a more specific location at the requesting location.
6. From Company: this should always be "199" and should default as you tab through the field.
7. Ship to or Stockroom, If Inventory: if this is a purchase requisition, this location code represents the ship to location that will be referenced on the purchase order. If this is a requisition for warehouse stock items then the location must be "815" warehouse.

- 103 FREEMAN ELEMENTARY
- 104 GARDENS ELEMENTARY
- 105 GARFIELD ELEMENTARY
- 106 GENOA ELEMENTARY
- 107 GOLDEN ACRES ELEM
- 108 PEARL HALL ELEM
- 109 JESSUP ELEMENTARY
- 11 J.J.A.E.P.
- 110 KRUSE ELEMENTARY
- 111 MEADOR ELEMENTARY
- 112 PARKS ELEMENTARY
- 113 POMEROY ELEMENTARY
- 114 RED BLUFF ELEMENTARY
- 115 RICHEY ELEMENTARY
- 116 L F SMITH ELEMENTARY
- 117 MAE SMYTHE ELEM
- 118 SOUTH HOUSTON ELEM
- 119 SOUTH SHAVER ELEM



8. Requested Delivery Date: this should be date that the goods are required.
9. Print Requisition: If a printed copy is required this field must be set to "Y". This is printed using RQ111. Once this is printed the Yes will change to No, to prevent any further printings.
10. PISD Bid Number: this is the PISD bid number that has been assigned to the item that the user is requesting to purchase. If the item is off bid, then the user should type in "Off Bid". If the user fails to enter a bid number the following message will be displayed and the user will not be allowed to proceed. All items that are purchased off bid should be reviewed by the initial approver and ultimately will be reviewed by the purchasing department and validated.



Miscellaneous Page

The Miscellaneous page can be used to enter default information for each of the requisition lines so that the user does not have to repeat the data entry. This information can be entered at the line level for each line item if the information varies by item.

1. Accounting Unit: this is the budget holders accounting unit that will default to the line items on the requisition. This can be entered at the line level if they vary by line.
2. Account: this is the expense code for the accounting unit. The user will only be able to see the accounts for their school or departmental accounting unit.
3. Vendor: this is the vendor number that will default to all items on the requisition. The vendor number is not a required field on the requisition. This is the requested vendor and this field can be left blank if the user does not what vendor this will be ordered. In this case, this will be assigned on the purchase order by the buyer.
4. Purchase From: this is not a required field. This is a vendor location in the event that the vendor has multiple locations. A specific location can be selected on this form. Otherwise, this will be the responsibility of the buyers when the requisition is converted to a purchase order.

