# Requisition Approval Process

**Form or Screen:** Infor Lawson: Invoice/Req Approval  
**Requisition Data**  
**Updated:** 10/13/16  
**QRG Doc. #:** Q.RQ.020

**Business Use:** A requisition entered and released by school or department personnel is routed to the designated “Approver” with budget oversight responsibilities. The Approver can review for accuracy and allowable expenditure and choose to either Approve, Unrelease (return) or Reject (delete) the requisition. Only Approved requisitions can progress forward to a Buyer for processing and submittal to a vendor.

**Tips and Best Practices:**
- When set up as a new approver, ensure e-mails are not being sent to your spam file.
- Some approvers set up rules in Outlook to have approval e-mails sent to a special folder that they can monitor daily.
- Best practice is to review the Inbasket at least weekly.

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<table>
<thead>
<tr>
<th>Fri 9/23/2016 11:42 AM</th>
<th><a href="mailto:ReqSchools@dpsk12.org">ReqSchools@dpsk12.org</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>This is a TEST from LAWPROD - LAWPROD - Requisition - 0104064 needs approval</td>
<td>To: HR Process Flow; HR Process Flow; HR Process Flow; Murph, Kendra; HR Process Flow; HR Process Flow</td>
</tr>
<tr>
<td>Retention Policy 60 Day Deleted Items Cleanup [60 days]</td>
<td></td>
</tr>
</tbody>
</table>

Please login to Lawson and proceed to your Inbasket to review the requisition.

Click Here to View Requisition

**Requisition:** 0104064

**Accounting Unit:** 2008972620

**Requester:** kmurphy

**Requesting Location:** 0897

**Inventory Items Total:** 0.00

**Non-Stock Items Total:** 0.00

**Special Items Total:** 50.00

This email is system generated, so please do not respond. The workunit associated with this email is DoTS Use Only

Work Unit #: 378

Productline LAWPROD

This email was generated by ProcessFlow ReqSchools

1. Designated Approver for a school or department BR (Budget Responsibility) will receive an e-mail notification that a requisition has been released and is waiting for approval.

2. The approver can access the Invoice/Req Inbasket directly by logging into Lawson, or through the link within the notification e-mail.
3. If a requisition is not approved within 3 days, a reminder is sent to the Approver.

**NOTE:** If no action is taken on a requisition within 30 days of entry, the requisition will be deleted from the system. The requestor would then need to re-enter a requisition if service or merchandise is still needed.

4. Log into Infor Lawson using your normal DPS login and password.

5. Click the globe icon. The icon will turn blue when successfully entered into Infor Lawson.

6. Expand the **Bookmarks** by clicking the down arrow. Click the lawprod next to the Inbasket.
7. Work tasks can be accessed by clicking either the My Tasks or My Work.

Recommendation is to click the My Tasks link.

8. The number of tasks or work items pending review will be displayed for each role assigned to the individual approver. Most approvers will either have the role of Principal or Department Head. There may be multiple roles within Facilities. To view the tasks, double click either the role name or the work items next to the name.

9. All Requisitions awaiting approval will begin with RQ in the description and include the requisition number followed by the name and employee id of the requestor.
10. Placing the cursor on the requisition number to be reviewed will display basic requisition information below.

Additional details are available by double clicking the requisition number.

11. Additional information is available for review by clicking any item that is underscored.

12. Following are actions specific to:
   - Approve a Requisition
   - Unrelease a Requisition
   - Reject a Requisition
## Approve A Requisition

13. To approve a requisition, select “Approve” in the menu bar.

14. No further message will appear and the requisition will move on in the process flow.

15. Continue reviewing remaining requisitions following steps 7 through 11.

## Unrelease A Requisition

When the Approver determines that a requisition should be modified before it is approved, the action selected would be “Unrelease”. This action prevents the requisition from moving on through the buyer and on to the vendor, however, it is returned to the requestor who can then modify it and resubmit for approval.

16. It is important to FIRST enter a message related to the action taken.

17. Before taking any action, select the “Messages” option in the menu below the Requisition heading information.
18. Under Actions, select “Create” in the drop-down menu or click the Create icon button.

19. Complete the following steps to create a message.
   A. Enter **Subject** information. It is suggested the subject include the action taken and the Req. #.
   B. Enter instructions in the message box that provides clear information to the requestor to make corrections.
   C. Once message is entered, select the **Save** icon.
   D. Click the **back button** to return to the invoice.
20. After the Message has been created and “Saved”, select “Unrelease” option under actions on the left side of the screen.

21. No further dialogue boxes will appear and the requisition status will change to Unreleased.

22. An E-mail will be sent to the requestor as notification of the “Unrelease” action taken. Message entered will be included in the e-mail.

A requisition in “Unreleased” status can be changed or modified and resubmitted for approval.

23. Continue reviewing remaining requisitions following steps 7 through 11.

Reject A Requisition

When the Approver determines that a requisition should not proceed forward, the action selected would be “Reject”. This action stops any further movement through process flow and essentially kills the requisition. A requisition in “Rejected” status cannot be changed or modified. A new requisition would need to be entered.

24. It is important to FIRST enter a message related to the action taken.

25. Before taking any action, select the “Messages” option in the menu below the Requisition heading information.
26. Under Actions, select “Create” in the drop-down menu or click the Create icon button.

27. Complete the following steps to create a message.

A. Enter Subject information. It is suggested the subject include the action taken and the Req. #.

B. Enter instructions in the message box that provides clear information to the requestor on why the requisition was rejected.

C. Once message is entered, select the Save icon.

D. Click the back button to return to the invoice.
28. After the Message has been created and “Saved”, select “Reject” option under actions on the left side of the screen.

29. No further dialogue boxes will appear and the requisition will be deleted from Lawson.

30. An E-mail will be sent to the requestor as notification of the “Reject” action taken. Message entered will be included in the e-mail.

31. Continue reviewing remaining requisitions following steps 7 through 11.