

APPROVING A REQUISITION AT-A-GLANCE

For Use with the LPISD eFinance Plus System

STEPS

1. Go to Main Menu, Purchasing, Requisition Processing, Approve/Deny Requisitions

“Approval Criteria” section: (No need to click the required box, all requisitions will need approval.)

2. Approval criteria (*select A-all requisitions*)
3. Click BLUE CHECK (*It will list all the requisitions in need of approval.*) from here you may:
 - View the requisition line item detail (*Double-click on the highlighted requisition*)
 - Approve a single requisition (*Highlight the requisition and click the APPROVE button. Approved requisitions will display a GREEN CHECK in the status (left of screen).*)
 - Deny a single requisition (*Highlight the requisition and click the DENY button. Denied requisitions will display a BLACK X in the status (left of screen).*)
 - Approve all requisitions listed (*Click the APPROVE ALL button.*)
 - Deny All requisitions listed (*Click the DENY ALL button.*)
 - Clear the previously selected approval (*Highlight the requisition and click the CLEAR button.*)

** You may approve or deny a REQUISITION on a line item basis and see the requisition line item by line item.– (*Highlight the requisition and double-click*) Your options will be the same as above with an extra option:

- Needs Correction (*Highlight the line item, click needs correction and a new window will open where you can enter a reason for requesting the correction, which will be stored in the LINE ITEM COMMENT field. It will send that line item back to the person who entered it.*)

TO SAVE THE APPROVAL, YOU MUST CLICK THE BLUE CHECK BUTTON WHEN YOU ARE FINISHED

An audit report will generate listing the requisitions that have been approved. You can send this to the printer or view it as a document.

Helpful Hints:

- STATUS column will show **Open** if the requisition is neither approved nor denied.
- A GREEN CHECK will display if the entire requisition **is approved**.
- A BLACK X will display if the entire requisition **is denied**.
- A MAGNIFYING GLASS (to review) will display if the requisition is **partially approved/denied** or indicated a line NEEDS CORRECTION.
- In the requisition detail, if the Budget Code says "Multiple," click on "Distributions" in the header bar to see a list of the budget codes being used.