

Guide for the Beginner Infor Lawson Requester

Welcome to the Infor Lawson Web Requisition. This system is designed to allow the users to access the Infor Lawson system through an Internet browser (Google Chrome) on their PC.

Lawson Web Requisition is similar to shopping for everyday items, utilizing familiar tools like search, fill-in forms and pull down menus. Routine and specialized tasks can be performed with a few mouse clicks and/or commands.

Items from internal (MMW, DIST, CGGS) and external sources (vendors) can be entered into one requisition.

Lawson Web Requisition is user specific. User information (account number(s) and delivery location) will be auto-filled upon signing in. The shopping list function (training provided in a different BB module) enables users to create and use custom order lists for frequently ordered items, speeding up the order process.

Purpose: This guide will provide a step by step process on how to requisition items and track the status. It will cover several ways to order items and save and/or print the requisition.

This guide assumes the user has some understanding of Internet browsers and is familiar with common Internet and PC terminology.

Any questions can be directed to LawsonAssist@upstate.edu or call “Lawson Assist” on vocera.

The Sign-on Screen

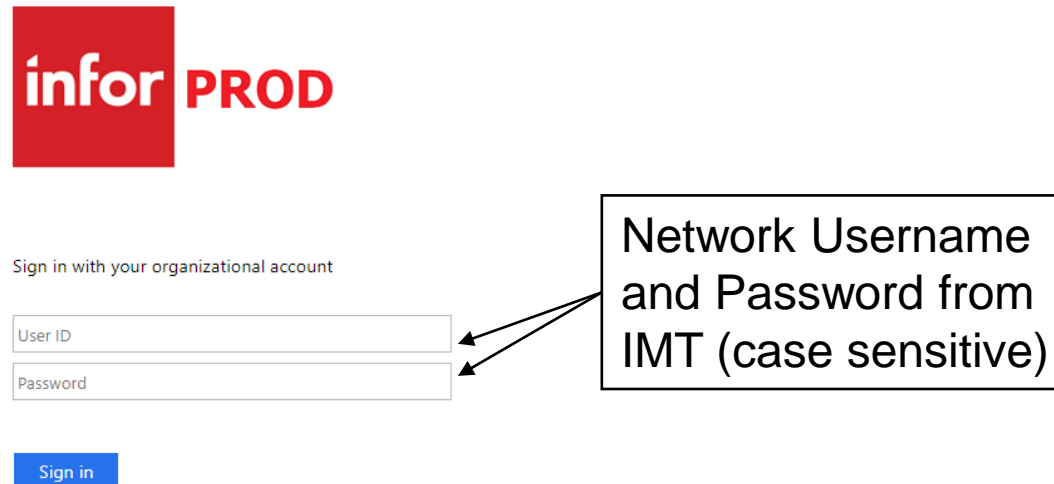
This screen is accessed through **Google Chrome**

URL <https://lawsondb.upstate.edu>

Or from a link found on the Materials Management homepage.

Enter Username and password. ***these are case sensitive***

Select Sign In and a personalized Information Office Page will load.



infor PROD

Sign in with your organizational account

User ID

Password

Sign in

Network Username and Password from IMT (case sensitive)

This is the form for placing orders

Requisition Center - Google Chrome
lawsondb.upstate.edu/rqc/html/index.htm

RQC

Home Profile Inquire Search Catalog Special / Service Template Express Order

Basic Detail Profile Accounting User Fields Comments

Requester pileskit Tracy Pileski
Requisition
Creation Date
Requisition Status

Requisition Lines

Item	Quantity	Cost
--- No Items ---		

Reference Number

Requisition Description

Requesting Company 9000 University Hospital

Requesting Location

Location Rule

Requested Delivery Date mm/dd/yyyy

Priority

Deliver To

Commodity Code

Total Quantity: 0
Total Cost: 0.00
Number of Lines: 0

New Clear Print Release

Basic

Detail Profile

Accounting

User Fields

Comments

The User profile function has been broken into 5 tabs that require certain data prior to assigning a requisition number.

Basic – Requesting location code and any specific delivery requirements

Detail Profile – From Location (internal/external)

Accounting – Department account number

User Fields – Do Not Use

Comments – Comments to print on the requisition, purchase order or delivery ticket

Once these fields are complete the shopping can begin.

Basic Tab

Requisition Center - Google Chrome
lawsondb.upstate.edu/rqc/html/index.htm

RQC

Home Profile Inquire Search Catalog Special / Service Template Express Order

Basic Detail Profile Accounting User Fields Comments Requisition Lines

Requester pileskit Tracy Pileski

Item	Quantity	Cost
--- No Items ---		

Requisition
Creation Date
Requisition Status

Reference Number

Requisition Description

Requesting Company 9000 Univer

Requesting Location

Location Rule

Requested Delivery Date

Priority

Deliver To

Commodity Code

Use default value. Only change **Requesting Location** if directed to.

If the requisition requires delivery to an alternate or more specific location, enter additional information into the **Deliver To** field

Detail Profile Tab

Requisition Center - Google Chrome
lawsondb.upstate.edu/rqc/html/index.htm

RQC

Home Profile Inquire Search Catalog Special / Service Template Express Order

Basic **Detail Profile** Accounting User Fields Comments

From Company 9000 University Hospital

From Location

Cost Default Vendor

Purchase From

Currency Code

Buyer

PO Code

Taxable

Tax Code

Quote Required No

Requisition Lines

Item	Quantity	Cost
--- No Items ---		

Select the order **From Location**
****REQUIRED FIELD****

****Do Not Change after items are added here****

- CG** - Community Campus Receiving Outside Orders
- RECV** - Receiving for Downtown Outside Orders
- MMW** - Materials Management Warehouse Orders
- DIST** - Central Distribution Orders

Accounting Tab

Requisition Center - Google Chrome

lawsodb.upstate.edu/rqc/html/index.htm

RQC

Home Profile Inquire Search Catalog Special / Service Template Express Order

Basic Detail Profile **Accounting** User Fields Comments

Distribution Company 9000 University Hospital

Accounting Unit 33130900

Account

Sub Account

Activity

Account Category

Asset Code

Asset Template

Requisition Lines

Item Quantity Cost

--- No Items ---

The accounting tab identifies the account to charge items to. The default account, assigned to the requesting location, will show in the **Accounting Unit**. If an alternate account is to be used, that account must be available in the Requester's profile. ****Lawson will not recognize an unauthorized account until checkout.****

Comments Tab

Comments to print on requisitions: Comments will only print on the requisition.

Comments to print on internal documents: Comments to share with purchasing (e.g. suggested vendor or special information regarding order or items)

Comments to print on Delivery Tickets: Comments will print on delivery ticket when the product is delivered, this can be handy as reminders of actions needed when items are delivered.

The screenshot shows a web browser window with the URL `lawsondb.upstate.edu/rqc/html/index.htm`. The page title is "RQC Requisition: 1313774". The navigation menu includes "Home", "Profile", "Inquire", "Search Catalog", "Special / Service", and "Template". Below this, there are tabs for "Basic", "Detail Profile", "Accounting", "User Fields", and "Comments", with "Comments" being the active tab. Under the "Comments" tab, there is a section titled "Comment Code" with a list of radio button options:

- Comments to Print on Headers of Internal Documents
- Comments to Print on Requisitions
- Comments to Print on Purchase Orders
- Comments to Print on a PO as Trailer Comments
- Comments to Print on Pick Lists
- Comments to Print on Receiving Documents
- Requisition Header Display Only Comments
- Comments to Print on Delivery Tickets
- Invoice Comments

Below the list is a large empty rectangular box, likely for a text input or a preview area.

Search Lawson for an item

1-Click Search Catalog

RQC Requisition: 1313774

Home Profile Inquire Search Catalog



2-In search box enter description or manufacture number or Lawson number

Search
Search for Inventory, Non Stock or Vendor Agreement Special Items
NACL X Q

3-Click **check box** under action, enter **Quantity** and click **Add Selected** to put into the cart

Add All Shown Add Selected Previous Next

✓ = Nonstock item at From Location RECV ✓+ = Stock item at From Location RECV

Action	Quantity	Item	Description	UOM	Cost	Available
<input type="checkbox"/>	1.00	23857 Manufacturer Code: BAX, Number: 2B1307	SOL .9% NACL INJ 100ML 2B1307	CA	0.000	
<input type="checkbox"/>	1.00	23870 Manufacturer Number: 1165810	SOL .9% NACL INJ 10CC 16X25	TY	0.000	
<input type="checkbox"/>	1.00	23870 Manufacturer Code: BAX, Number: 2B7126	SOL .9% NACL IRR 2000ML 2B7126	CA	20.500	
<input type="checkbox"/>	1.	23871 Manufacturer Code: BAX, Number: 2B7231	SOL .9% NACL IRR 1000ML 2B7231	CA	0.000	
<input type="checkbox"/>	1.00	24324 Manufacturer Code: BAX, Number: 2B10630	SOL 5% DEX 9% NACL 500 2B1063Q	CA	16.750	

There must be a check or check plus in front of the item.

A checkmark means the item is a non-stock item and a checkmark with a plus means it is an inventory item.

If there is no checkmark it means the item is not stocked at the **From Location** selected on the Detail Profile tab.

Contact Hospital Purchasing for assistance 315-464-6039

Search for Inventory, Non Stock or Vendor Agreement Special items

NACL X Q

Add All Shown

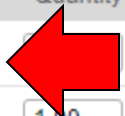
Add Selected

Previous

Next

✓ = Nonstock item at From Location **MMW** ✓+ = Stock item at From Location **MMW**

Action	Quantity	Item	Description	UOM	Cost	Available
<input type="checkbox"/> ✓+		23856 Manufacturer Code: BAX, Number: 2B1307	SOL .9% NACL INJ 100ML 2B1307	EA	1.667	3,535.00 EA
<input type="checkbox"/> ✓+	<input type="text" value="1.00"/>	23857 Manufacturer Number: 1165810	SOL .9% NACL INJ 10CC 16X25	TY	20.700	31.00 TY
<input type="checkbox"/> ✓+	<input type="text" value="1.00"/>	23870 Manufacturer Code: BAX, Number: 2B7126	SOL .9% NACL IRR 2000ML 2B7126	EA	6.163	1,004.00 EA



Add Specials/Services to Requisition

RQC Requisition: 1313774

Home

Profile

Inquire

Search Catalog

Special / Service



To add **Specials or Services** (things or services ordered infrequently) to the order select **Special/Service**

No need to place a separate order

Special / Service

1-Enter Manufacturer number in **Item**

2-Enter **Description** (the more detail the better)

3-**Item Type** = Special or Service (Special is an item to be received a Service is not received)

4-Quantity

5-Unit of Measure (**UOM**)

6-Cost (If unknown enter \$1.00)

7-**Cost Default Vendor** = Enter Vendor (If unknown select 99)

8-Account-****Not the cost center****
643200 for medical supplies,
653001 for non-medical supplies

9-Click **Add**

Repeat steps for each special/service on requisition

The screenshot shows a requisition form for 'Special / Service' items. The form contains the following fields and controls:

- Item**: Text input field.
- Description**: Text input field.
- Item Type**: Dropdown menu with 'Special' selected.
- Quantity**: Text input field.
- UOM**: Text input field with a search icon.
- Cost**: Text input field.
- Cost Default Vendor**: Text input field with a search icon.
- Purchase From**: Text input field with a search icon.
- Currency Code**: Text input field with a search icon.
- Distribution Company**: Text input field with '9000' and a search icon.
- Accounting Unit**: Text input field with '33130900' and a search icon.
- Account**: Text input field with a search icon.
- Sub Account**: Text input field with a search icon.
- Activity**: Text input field with a search icon.
- Account Category**: Text input field.
- Asset Code**: Text input field with a search icon.
- Asset Template**: Text input field with a search icon.
- Major Purchase Class**: Text input field with a search icon.
- Minor Purchase Class**: Text input field with a search icon.
- Cost Option**: Dropdown menu with 'Cost Required' selected.
- Requested Delivery Date**: Text input field with a calendar icon and 'mm/dd/yyyy' format.
- Add**: Button at the top right.

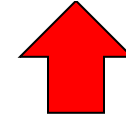
Red arrows numbered 1 through 9 point to the following fields:

- Item
- Description
- Item Type
- Quantity
- UOM
- Cost
- Cost Default Vendor
- Account
- Add

Express Order

RQC Requisition: 1313774

Home	Profile	Inquire	Search Catalog	Special / Service	Template	Express Order
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If you know the Lawson number and are certain of the item source, choose **Express Order**.

Enter the Lawson # in the **Item** field, click **Find**

Express Order

[Search for and Add a known item to the requisition.](#)

Item

Description SOL .9% NACL INJ 100ML 2B1307

Manufacturer Name

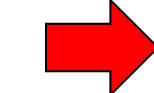
Vendor

Vendor Item

Quantity

UOM CA There are 96 EA per CA

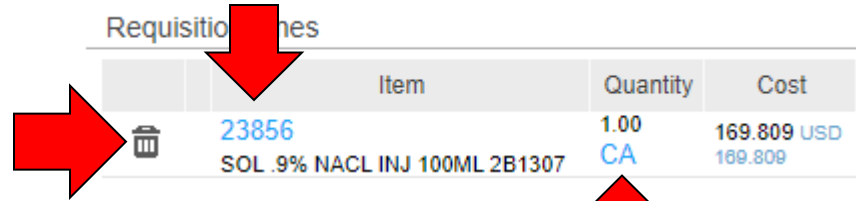
Entry Code Item



Select **Quantity** and click **Add**

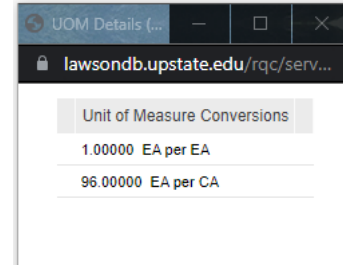
Cart-Requisition Lines

To remove an item from the cart, click the trash can



Requisition	Item	Quantity	Cost
	23856 SOL .9% NAACL INJ 100ML 2B1307	1.00 CA	169.809 USD 169.809

Click UOM to see conversions



Unit of Measure Conversions	
1.00000	EA per EA
96.00000	EA per CA



Change

Quantity	Item	Description	UOM	Cost	Currency	Status
1.00	23856	SOL .9% NAACL INJ 100ML 2B1307	CA	169.809 169.80900	USD USD	Unreleased

Line Basic | Line Detail | Line Accounting | Line User Fields | Line Comments

Generic Name BLD
Item Type Nonstock
Item Entry Code Item

Major Purchase Class

Minor Purchase Class

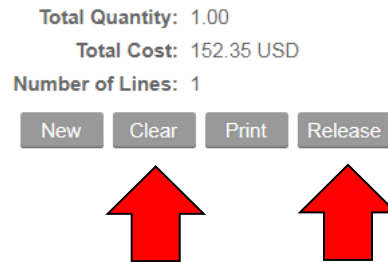
Manufacturer Code

Manufacturer Division

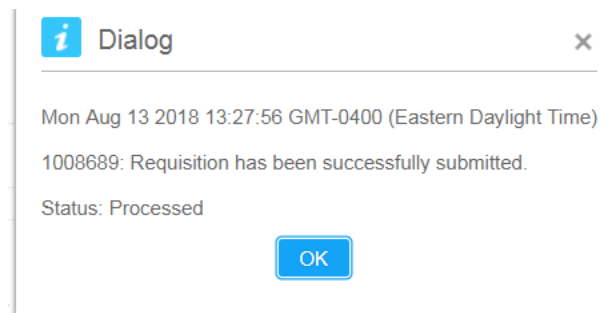
Manufacturer Number

Click the Lawson Number in **Requisition Lines** to view item information, edit quantity or UOM. For Inventory Items, edit quantities, Click **Change** to save any changes to the requisition.

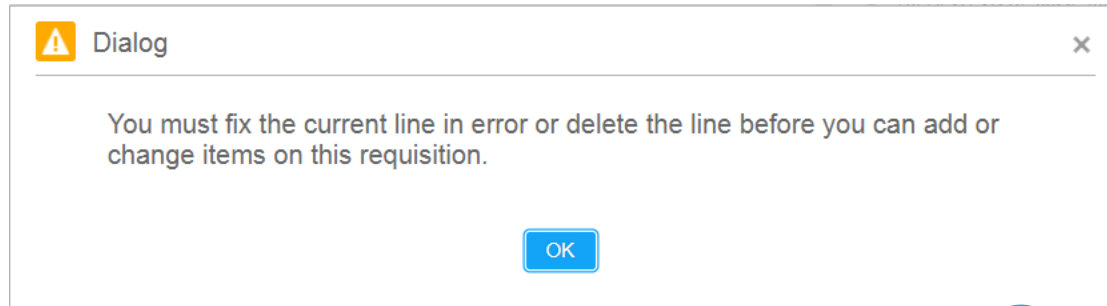
To submit the order click **Release** or to delete the order click **Clear**




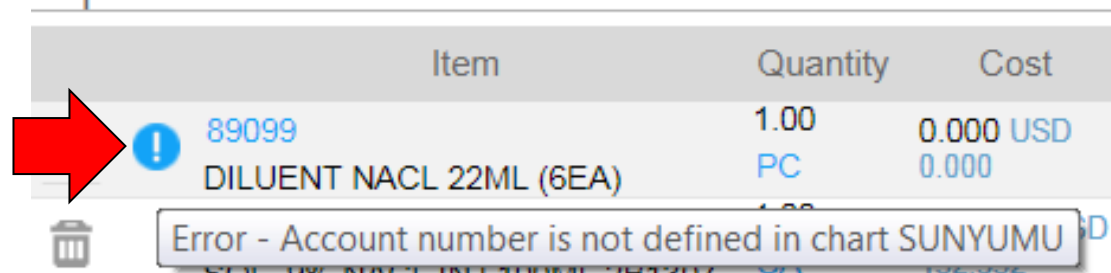
Once the order is released the following message will appear to confirm the order has been successfully submitted.



Error Messages: All error messages must be resolved before order is processed



Hover the mouse over the blue circle  to see additional error code information

A screenshot of a requisition table. The table has columns for "Item", "Quantity", and "Cost". The first row shows item "89099" with a quantity of "1.00" and a cost of "0.000 USD". Below the table, a tooltip is visible with a trash icon and the text "Error - Account number is not defined in chart SUNYUMU". A red arrow points to a blue circle with an exclamation mark on the left side of the table row.

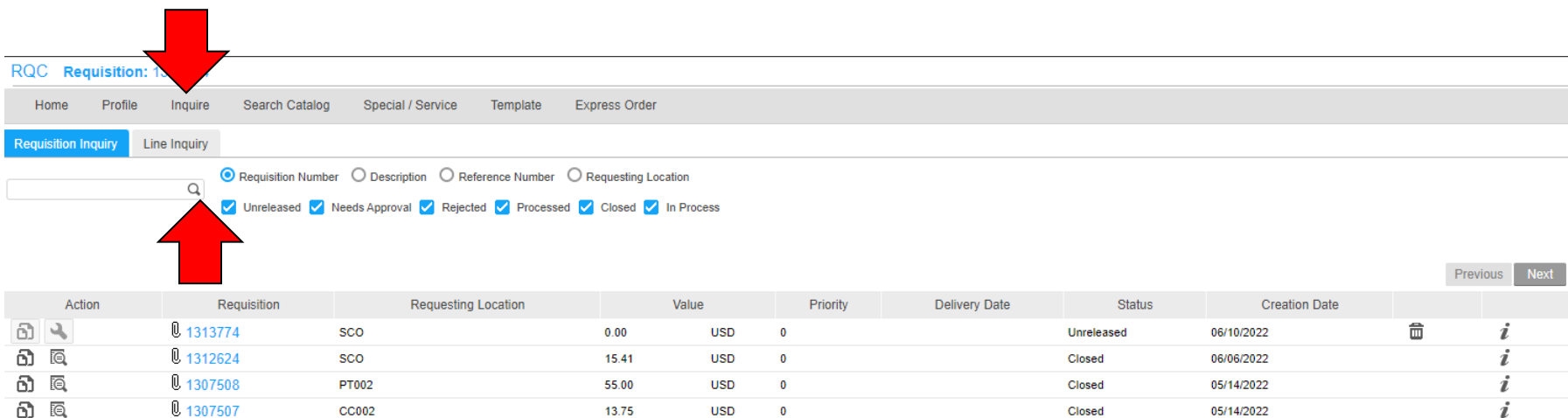
Item	Quantity	Cost
89099 DILUENT NAACL 22ML (6EA)	1.00 PC	0.000 USD 0.000

If you cannot resolve the error please contact
Lawson Assist via vocera
or email LawsonAssist@upstate.edu

Once the order has successfully released a copy of the order can be printed. From the top menu select **Inquire**.

Click the magnifying glass to get a list of previous requisitions.

The newest order will be at the top of the list.



RQC Requisition: 13














Home Profile Inquire Search Catalog Special / Service Template Express Order

Requisition Inquiry Line Inquiry

Requisition Number Description Reference Number Requesting Location

Unreleased Needs Approval Rejected Processed Closed In Process

Previous Next

Action	Requisition	Requesting Location	Value	Priority	Delivery Date	Status	Creation Date		
 	 1313774	SCO	0.00 USD	0		Unreleased	06/10/2022		<i>i</i>
 	 1312624	SCO	15.41 USD	0		Closed	06/06/2022		<i>i</i>
 	 1307508	PT002	55.00 USD	0		Closed	05/14/2022		<i>i</i>
 	 1307507	CC002	13.75 USD	0		Closed	05/14/2022		<i>i</i>

To view a requisition click on paper with the magnifying glass

A	Requisition	Requesting Location	Value	Priority	Delivery Date	Status	Creation Date	
	1182883	CG024	0.00	USD	0	Unreleased	02/24/2021	
 	1182882	08F_N	3.67	USD	0	Processed	12/24/2020	

Once on this screen, click Print and a .pdf will generate and appear on the screen.

RQC Requisition: 1182882 ✕

Find / Shop ▾ Inquire Profile

Basic Detail Profile Accounting User Fields Comments Procedure

Requester bakerk Ken Baker
Requisition 1182882
Creation Date 12/24/2020
Requisition Status Processed

Reference Number
Requisition Description
Requesting Company 9000 University Hospital USD
Requesting Location 08F_N 8F CLEAN SUPPLY ROOM
Requested Delivery Date
Priority 00
Deliver To
Commodity Code

Requisition Lines

Item	Quantity	Cost
54769	5.00	0.315 USD
URINAL MALE	EA	1.575
61190	2.00	1.045 USD
MESH UNDERGARMENT	EA	2.090

Total Quantity: 7.00
Total Cost: 3.67
Number of Lines: 2



The.pdf can be saved to a file or sent it to a printer



Company 9000 - University Hospital
Requesting Location 08F_N - 8F CLEAN SUPPLY ROOM
Requisition 1182882 - Processed
Purchase From Buyer

Cost Default Vendor
Requisition Description

Requester bakerk - Ken Baker
Deliver To



Item	Item Type	Quantity Ordered	UOM	Unit Cost	Extended Cost	Distributions	Activity / Account Category	Distribution Allocation	Requested Delivery Date	Sourcing Event Required
61190	Inventory	2.00	EA	1.045	2.090	34138700-643200-0000		100.0%	Dec 24, 2020	No
MESH UNDERGARMENT Manufacturer Code : CRLN Number : 08137376										
54769	Inventory	5.00	EA	0.315	1.575	34138700-643200-0000		100.0%	Dec 24, 2020	No
URINAL MALE Manufacturer Code : VOLR Number : H140-01										
Totals: 2 Lines		7.00			3.67 USD					

Requisition must say **Processed**.
If it does not contact **Lawson Assist** via vocera
or email LawsonAssist@upstate.edu

Thank you for completing the Infor Lawson Web Req training.

**To receive credit for taking this course you must
take the post test in BlackBoard.**