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.
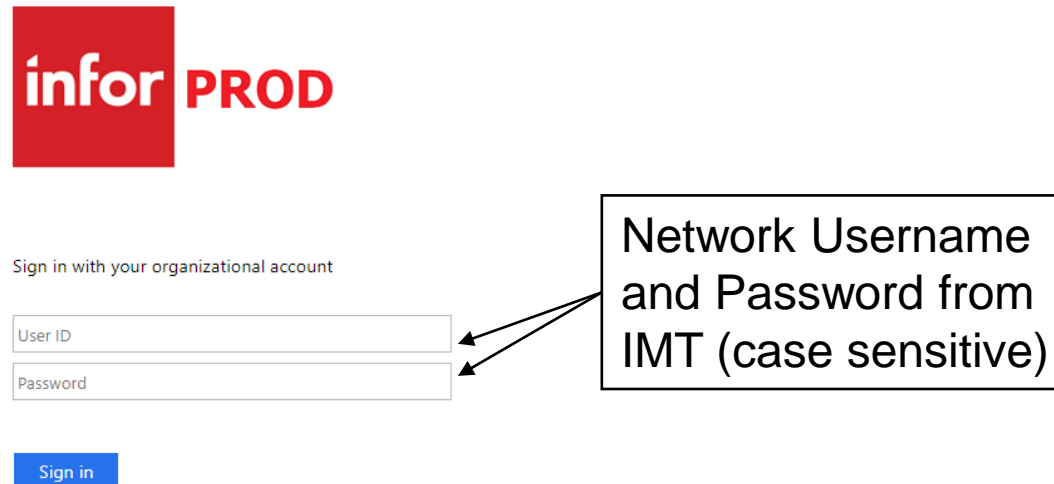
The Sign-on Screen
This screen is accessed through **Google Chrome**

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.

Network Username and Password from IMT (case sensitive)

This is the form for placing orders

| 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.

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Basic Tab

Screenshot of Requisition Center (Google Chrome) at lawsondb.upstate.edu/rqc/html/index.htm showing the RQC window with tabs: Home, Profile, Inquire, Search Catalog, Special / Service, Template, Express Order. Sub-tabs: Basic, Detail Profile, Accounting, User Fields, Comments.

Basic tab fields:
- Requester: pileskit — Tracy Pileski
- Requisition:
- Creation Date:
- Requisition Status:
- Reference Number:
- Requisition Description:
- Requesting Company: 9000 University...
- Requesting Location: SCO
- Location Rule:
- Requested Delivery Date: mm/dd/yyyy
- Priority:
- Deliver To: TRACY SLC 2116
- Commodity Code:

Requisition Lines columns: Item, Quantity, Cost — No Items —

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

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Detail Profile Tab

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

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.

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

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
☐	1.00	rer Code: BAX, Number: 2B1307	SOL .9% NACL INJ 100ML 2B1307	CA	0.000	
⊞ ☐	1.00	23_57 Manufacturer Number: 1165810	SOL .9% NACL INJ 10CC 16X25	TY	0.000	
⊞ ☐	1.00	23870 Manufacturer Code: BAX, Number: 2B7126	SOL .9% NACL IRR 2000ML 2B7126	CA	20.500	
⊞ ☐	1.	23871 Manufacturer Code: BAX, Number: 2B7231	SOL .9% NACL IRR 1000ML 2B7231	CA	0.000	
⊞ ☐	1.00	24324 Manufacturer Code: BAX, Number: 2B1063Q	SOL 5% DEX 9% NACL 500 2B1063Q	CA	16.750	

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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 in 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

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	
⊕ ☐ ✓+		23856 Manufacturer Code: BAX, Number: 2B1307	SOL .9% NACL INJ 100ML 2B1307	EA	1.667	3,535.00	EA
⊕ ☐ ✓+	1.00	23857 Manufacturer Number: 1165810	SOL .9% NACL INJ 10CC 16X25	TY	20.700	31.00	TY
⊕ ☐ ✓+	1.00	23870 Manufacturer Code: BAX, Number: 2B7126	SOL .9% NACL IRR 2000ML 2B7126	EA	6.163	1,004.00	EA

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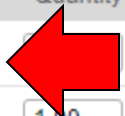
Add Specials/Services to Requisition

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

Field	Value
Item	
Description	
Item Type	Special
Quantity	
UOM	
Cost	
Cost Default Vendor	
Purchase From	
Currency Code	
Distribution Company	9000
Accounting Unit	33130900
Account	
Sub Account	
Activity	
Account Category	
Asset Code	
Asset Template	
Major Purchase Class	
Minor Purchase Class	
Cost Option	Cost Required
Requested Delivery Date	mm/dd/yyyy

Add

1
2
3
4
5
6
7
8
9

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Express Order

RQC **Requisition:** 1313774

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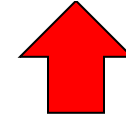
If you know the Lawson number and are certain of the item source, choose **Express Order**.

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

Express Order

Search for and Add a known item to the requisition.

Item	23856

Find   Add

Description	SOL .9% NACL INJ 100ML 2B1307
Manufacturer Name	
Vendor	
Vendor Item	
Quantity	1.00
UOM	CA
Entry Code	Item

There are 96 EA per CA
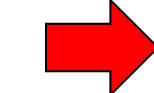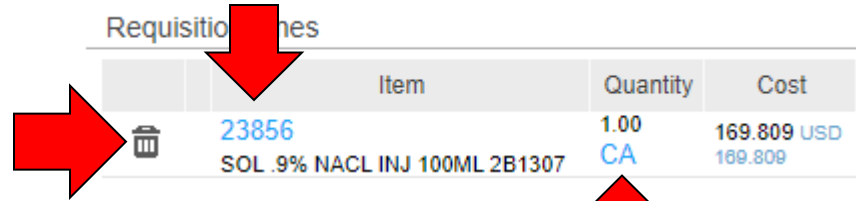
Select **Quantity** and click **Add**

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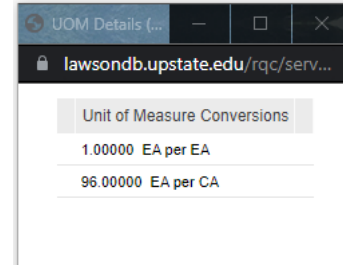
Cart-Requisition Lines

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

Click UOM to see conversions

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.

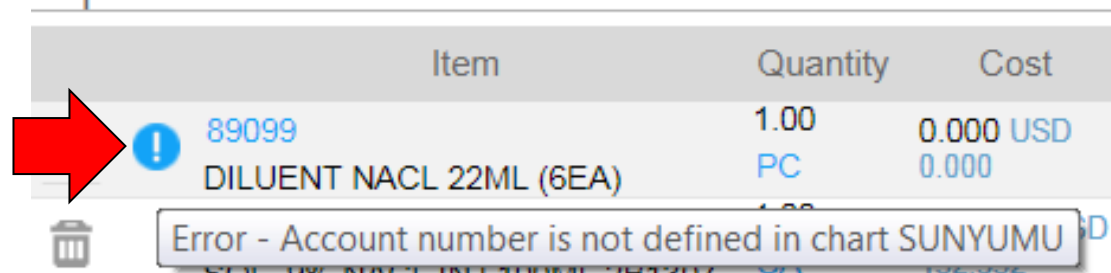To submit the order click **Release** or to delete the order click **Clear**

Total Quantity: 1.00
Total Cost: 152.35 USD
Number of Lines: 1

[New] [Clear] [Print] [Release]
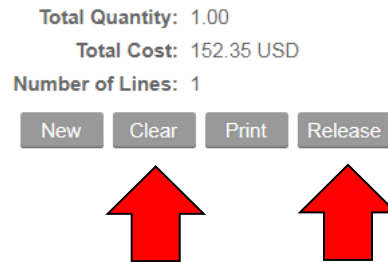
Once the order is released the following message will appear to confirm the order has been successfully submitted.

i Dialog   ×

Mon Aug 13 2018 13:27:56 GMT-0400 (Eastern Daylight Time)

1008689: Requisition has been successfully submitted.

Status: Processed

[OK]

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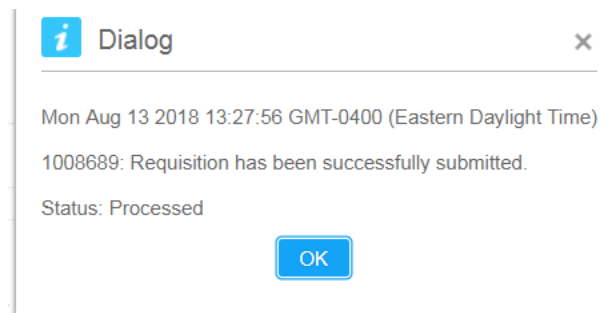
Error Messages: All error messages must be resolved before order is processed
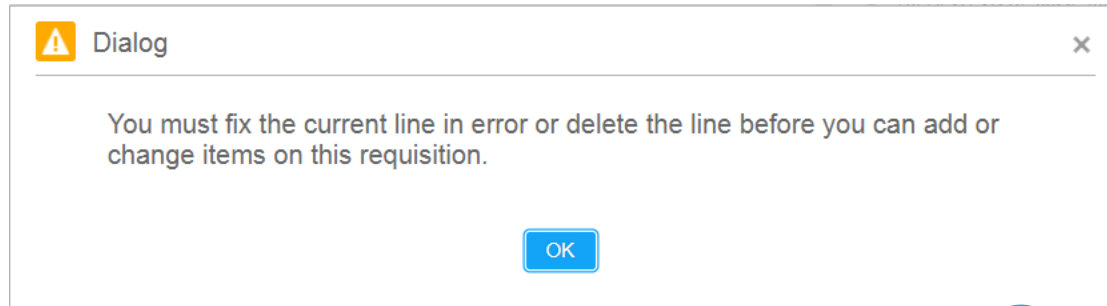
Hover the mouse over the blue circle ! to see additional error code information
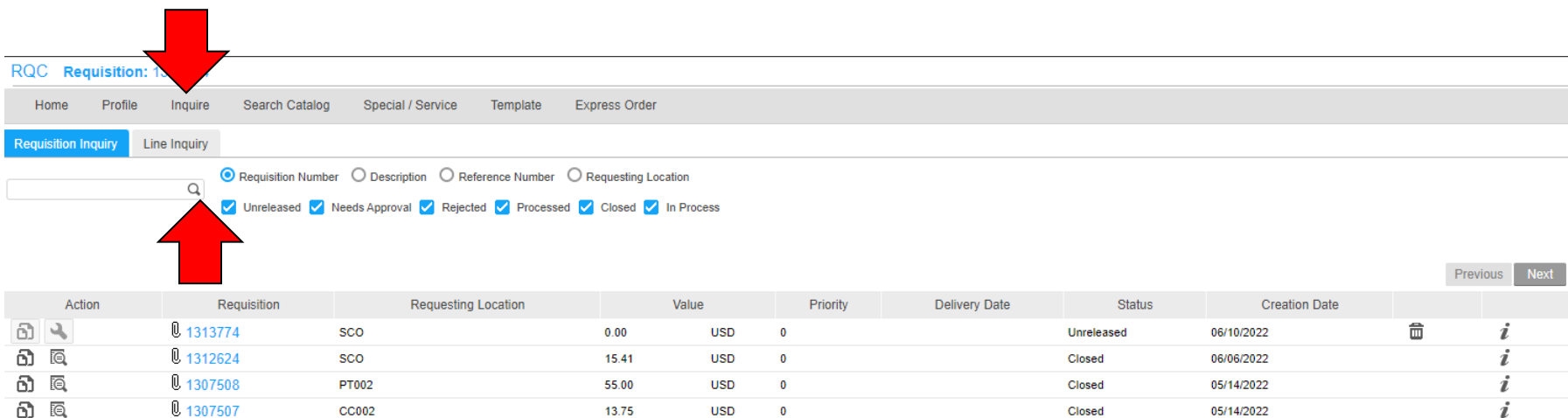
If you cannot resolve the error please contact **Lawson Assist** via vocera or email LawsonAssist@upstate.edu

Once the order has successfully released a cop 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.

To view a requisition click on paper with the magnifying glass

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

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.