



## ***Financial Services - Frequently Asked Questions***

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## Infor Lawson System Access

### How do I get System Access?

The school principal or department manager must submit an Infor Lawson Access Request form to the DoTS Hotline for a new employee who will need to work within the Infor Lawson Financial system. The form is available on [The Commons](#), under training.

New Employees (or an employee new to a role) needing access to Infor Lawson Financials will be required to take certain courses based on their functional role or Infor Lawson system access needed. A matrix is provided below, which defines the course requirements. DoTS will confirm the new employee has completed training before access will be granted.

Infor Lawson Financial Training Course Requirements					
X = Course Required for Lawson Access Blue Shade = Course is not required for Access but completion is required as pre-determined by manager.		Outline Course Name and ID			
		<a href="#">Lawson and Account Basics (55 Min)</a>	<a href="#">Purchasing Basics (15 Min)</a>	<a href="#">Requisitions - Procure to Pay (75 Min)</a>	<a href="#">Requisition &amp; Invoice Approval (15 Min)</a>
		DoTS-805E1	DoTS-805E2	DoTS-805E4	DoTS-805E5
<b>Function/Role Access</b>					
	Requisition Center	X	X	X	
	Requisition/Invoice Approver		X		X
	Finance LBI Dashboard	X			
	Time and Attendance (Instructor Led Payroll Training is also required)	X			
<b>Finance Departments</b>					
	Office of the Controller	X	X	X	X
	Department/School Support (Budget Office)	X	X		
	Strategic Sourcing	X	X	X	X
	Accounts Payable	X	X		
	Payroll	X			
	All Others	X			



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### **Can clerical substitutes be granted Lawson access?**

Clerical substitutes who are DPS hourly employees and have an employee ID will be granted access through their login once they have completed training.

1. If a school or department needs to hire a clerical substitute who has not received training, it will be the responsibility of the hiring school or department to pay the employee their wages while completing the training.
2. The clerical substitute with an employee id will be provided with their own Lawson access under their login id once they complete Lawson training. The security access role would be the same as a secretary role for requisitions.
3. The substitute secretary should be granted access to the school or department accounts at the request of the school principal, assistant principal or business manager or department manager **for a specified period of time**. The requesting principal or manager would submit the request through the DoTS Hotline.

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### **Can Non-DPS employees be granted Infor Lawson access?**

System access will not be granted to non-DPS employees or new employees until a DPS employee ID has been created for the individual.

The requesting manager of the temporary employee must submit the Infor Lawson Security Access Request form **for a specified period of time**. Access is restricted to a maximum of one year. If access to Lawson is required beyond one year, the requesting manager must resubmit an Infor Lawson Security Access Request form when the year is nearing completion.

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### What do I have to do when an employee changes jobs or site location?

Job and site location changes are inevitable within all organizations, and within DPS it is especially prevalent at the beginning of each school year. Following is a matrix of typical personnel and location changes and corresponding actions required by the Infor Lawson Financials user and their manager.

Site Change	Job Change	Lawson Financials Role	Action Required	Responsibility
Yes	No	Requisition Center - Requestor	E-mail Infor Lawson Financials Access Request form found <a href="#">The Commons</a> to DoTS Hotline. Use “Other Business Functions” field to indicate change in site location.	Manager of employee
Yes	No	Requisition/Invoice Approver, P-Card Approver, P-Card Holder	No Action Required	
N/A	Yes - Leaving	Requisition/Invoice Approver, Req. Center, P-Card Approver, P-Card Holder	E-mail to DoTS Hotline requesting that employee leaving role has access removed.	Manager of employee leaving position
N/A	Yes - New	Approver, Req. Center, P-Card Approver, P-Card Holder	E-mail Infor Lawson Financials Access Request form found on <a href="#">The Commons</a> to DoTS Hotline	Manager of employee entering new role

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## System Training

### How do I participate in online training?

Online training for Infor Lawson Financials is available. Course registration is not required and instructions on how to access courses are available on [The Commons](#), in the Training section.

Employees will not need to attend instructor led classes and can now access and complete these training courses through their own computer. This provides ease of access as well as the ability to take the courses at times convenient to the employee. **The training is not restricted to new employees and current employees are encouraged to view the courses as a refresher.**

Lessons have been set up within several of the courses so an employee may repeat a partial review at a later time by accessing specific lessons outlined on the menu bar within the course.

Course Name & Number	Course Content
Lawson & Account Basics - DoTS 805E1	<ul style="list-style-type: none"> <li>• DPS Account Code Structure and Use</li> <li>• How to Navigate within Lawson</li> <li>• Lawson LBI Dashboard and Reports</li> </ul>
Purchasing Basics - DoTS 805E2	Overview of acceptable purchasing options in DPS
Requisitions - Procure to Pay - DoTS 805E4	<ul style="list-style-type: none"> <li>• Procurement to Payment Process Flow</li> <li>• Guidelines on Purchase Order (Requisition) process</li> <li>• Detail Requisition Data Entry on different types of <b>Goods</b> and <b>Services</b> orders</li> <li>• On-line requisition simulation exercises</li> <li>• Guidelines on Purchase Order receiving of <b>Goods</b></li> <li>• Detail Receiving on <b>Goods</b> and simulation exercises</li> <li>• Guidelines on <b>Service</b> invoice approval process</li> </ul>
Requisition/Invoice Approval - DoTS 805E5	Guidelines and details on completing on-line approval of requisitions and <b>Service</b> invoices

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### **I've completed system training but need a little assistance, how do I get this?**

Reference materials and quick reference guides to all purchasing applications as well as most commonly used functions can be found in The Commons. If you have a critical question for which you have not found a resource, you may also contact the DoTS Hotline. Please clearly state your question or issue so that appropriate support staff can be contacted to assist you.

Monthly Working Lab sessions are scheduled to help employees who have taken the Lawson Financials training class but need assistance in completing orders or have specific questions on some area of the process. This is not a training class, but rather a working lab for assistance. These labs are open on a drop-in basis. The schedule of Working Labs can be found on the Training Section in the Commons using this link: <http://thecommons.dpsk12.org/Page/714>.

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## System Questions & Problems

### Will Lawson run on any internet application?

Infor Lawson Financials is an Internet Explorer application. Access to the system will not work using Firefox or other internet applications.

Starting with Infor Lawson V10, Chrome will be supported by the district. Until then, Internet Explorer is the only supported browser at this time.

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### How do I get help if I get an error message in Lawson?

An e-mail should be sent to the DoTS Hotline [Hotline, DoTS <DoTS\\_Hotline@dpsk12.org>](#) . The e-mail should include a full screen shot (with browser URL) of any error messages presented when trying to access the system or any screen within the system.

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