**Purchase Requisition for Goods in Lawson Financials**

<table>
<thead>
<tr>
<th>Form or Screen: Infor Lawson Requisition Center</th>
<th>Updated 10/26/16</th>
<th>QRG Doc. #: Q.RQ.001</th>
</tr>
</thead>
</table>

**Business Objective:** An order is first entered into the Infor Lawson Requisition Center as a Purchase Requisition. A Purchase Order will then be created through Lawson Process Flow to be sent to the vendor. The Specials requisition is the most commonly used form for ordering goods or merchandise when purchases exceed $5,000.

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**Requisition Set-up Tabs**

1. Expand the Bookmarks option and Select **Requisition Center**.

2. Select **Shopping** from the Requisition Center list.

3. Five Tabs will be displayed. Instructions below, in steps 4 through 33, should be followed on all types of orders for merchandise or goods.

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NOTE: All required fields will also have an asterisk (*) displayed next to the field name in Infor Lawson.

4. Select the Basic tab.

5. Leave Requisition Description blank.

6. **Requesting Location** defaults to the accounting location assigned to the user id.

7. Leave the **Requested Delivery Date** blank. If order needed ASAP, contact buyer via email.

8. Leave **Priority** blank.

9. Enter requesting location in **Deliver To (required field)** with enough information to clearly identify final destination and room number. If final destination is a location other than the requesting location, be careful to clearly identify location name and room number.

10. Enter **Commodity code** (required field). Click search field (magnifying glass to the right of the field) to search (Reference: “Search for Commodity Code - QRG” for more information on how to complete a search if needed.

11. **Sourcing Event Required** defaults to “No”.

<table>
<thead>
<tr>
<th><strong>Reference Number</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Request Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Requesting Company</strong></td>
<td>DENVER PUBLIC SCHOOLS</td>
</tr>
<tr>
<td><strong>Requesting Location</strong></td>
<td>ARCHULETA (LENNA) E8</td>
</tr>
<tr>
<td><strong>Requested Delivery Date</strong></td>
<td>mmm/dd/yyyy</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Deliver To</strong></td>
<td>Archuleta, Room 218</td>
</tr>
<tr>
<td><strong>Commodity Code</strong></td>
<td>715-85</td>
</tr>
<tr>
<td><strong>Sourcing Event Required</strong></td>
<td>No</td>
</tr>
</tbody>
</table>
12. Select **Detail Profile** tab.

13. **From Company** defaults to 0010 – DENVER PUBLIC SCHOOLS.

   **Note:** If this field is blank, click the drop-down box and select 0010 – Denver Public Schools. This field must be populated with this description to enable search capabilities for other fields.

14. **From Location** (Ship-to): If left blank, it will default to your Requesting Location. Or click the search box (magnifying glass to the right of the field) to search.

   **NOTE:** If order is for equipment that must be shipped to warehouse for bar coding, enter 2100 for warehouse.

15. Enter **Cost Default Vendor** (required field) vendor for this requisition. Click the search box (magnifying glass to the right of the field) to search; (Reference: “Search for a Vendor - QRG” for more information on how to complete a search if needed.)

16. **Purchase From** and **Currency Code** fields remain blank.

17. To select **Buyer** (required field) click search box (magnifying glass to the right of the field) to search. Specific buyers handle specific commodity codes. (Reference “Commonly Used Commodity Codes” on the Financial Services Resource Center for a cross-reference of commodity codes to DPS Buyer).


19. **Quote Required**, **Single Document to PO** and **Bill Code** – remain as defaulted. Do not make any changes,
20. Select **Accounting** tab.

21. **Distribution Company** will default of 0010. Click the drop down to select the appropriate Company (Fund) for the Accounting Unit and Account that the expense is to be charged to.

22. The default **Accounting Unit** and **Account** is based on the accounting location associated to the user ID. Account will default to Instructional Supplies. (The **Sub Account** will remain blank since non-salary accounts will always default to “0” and **should not** be changed). The Accounting Unit should be changed to accurately identify the Accounting Unit to be charged. The Account should be changed to appropriately identify the type of expense. To change either the Accounting Unit or Account, enter numbers or click the search box (magnifying glass to the right of the fields) to search and select.

23. If an account with an activity code is used, enter those numbers in the **Activity** and **Account Category** section or click on drop-down box (three dots to the right of the fields) to search.

   **Note:** Activity and Account Category is required if the 1st digit of the Accounting Unit entered is 3 or greater.

24. Leave **Asset Code** and **Asset Template** blank.

25. **User Fields** tab.

   At this time leave all fields in this tab blank.
26. Once the Comments tab is selected, the Requisition # will appear in the upper middle portion of the screen.

27. Comments tab is only used if additional information is needed for the Vendor or notes to the buyer.

28. Comment Code - At this time there is no code in the drop down.

29. Select the “Comments to Print on Purchase Order”

30. Enter comments in the free form field.

Common use of Comments:

a. E-Quote Number for technology equipment
b. Instructions for Vendor – such as arrival time and destination for charter bus
c. Notes to Buyer – Please label as “Note to Buyer”
d. Critical Delivery Date – Headline with “Note to Buyer” and note there is a critical delivery date with the exact required delivery date.

31. Click Update after comments are entered.

32. To order goods or merchandise click the Special/Service option in the menu bar.

There are typically three categories of orders that can be placed for merchandise or goods. Instructions for these order types are separated below based on the following categories:

a. General goods/merchandise
   Any single order for merchandise that will not be delivered to the warehouse for the purpose of bar coding and asset tracking. (Example: classroom textbooks)

b. Draw down purchase order for goods
   A requisition created for multiple purchases of the same product type over time. (Example: fuel for buses)

c. Equipment – Warehouse delivery
   Any single order for merchandise that will be delivered to the warehouse for the purpose of bar coding and asset tracking. (Example: technology equipment)
Purchase Requisition for Goods in Lawson Financials

General Goods/Merchandise Order

1. Enter Item (required field) or SKU# of item if known
2. Enter Description. (required field)
3. Item Type defaults to Special.
4. Enter Quantity. (required field)
5. Enter UOM (required field) (Unit of Measure) or click the search box (magnifying glass to the right of the fields) to search.
6. Enter Cost. (required field)
7. Cost Default Vendor populate from data entered on Detail Profile tab.
9. Distribution Company, Accounting Unit, Account, Sub Account, Activity, and Account Category populate from data entered on the Accounting tab. Refer to Split Funding Steps below if item is to be charged to more than one account.
10. Leave Asset Template, Major Purchase Class, Minor Purchase Class, Requested Delivery Date (or see #7 on Basic Tab), Late Delivery Date, and PO Code blank.
11. Commodity Code populates from data entered on Basic tab.
12. Sourcing Event Required will populate from data entered on Basic tab.
13. Taxable defaults to "No".
15. Click Add to move items ordered to Requisition Lines.
16. To add additional lines, replace Item, Description, Quantity, UOM, Cost, and Accounting Unit, (and required fields from step #9 if account is changing), and select Add after each line to move to Requisition Lines.

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### Draw Down Order for Goods

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item</td>
<td>Enter Item (required field) or SKU# for item if known.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter Description. (required field)</td>
</tr>
<tr>
<td>Item Type</td>
<td>Item Type defaults to Special</td>
</tr>
<tr>
<td>Quantity</td>
<td>Enter Quantity (required field) Note that quantity is the anticipated total cost. This is based on the cost of each item equal to $1. This allows the receiving to be on the dollar value of each delivery.</td>
</tr>
<tr>
<td>UOM</td>
<td>Enter UOM (Unit of Measure) (required field) Unit of Measure for Draw Down Requisitions is LT.</td>
</tr>
<tr>
<td>Cost</td>
<td>Enter Cost (required field) of 1 (Representing $1 per item).</td>
</tr>
<tr>
<td>Default Vendor</td>
<td>Cost Default Vendor populate from data entered on Detail Profile tab.</td>
</tr>
<tr>
<td>Purchase From</td>
<td>Leave Purchase From and Currency Code blank.</td>
</tr>
<tr>
<td>Distribution Company</td>
<td>Distribution Company, Accounting Unit, Account, Sub Account, Activity, and Account Category populate from data entered on the Accounting tab. Refer to Split Funding Steps below if item is to be charged to more than one account.</td>
</tr>
<tr>
<td>Accounting Unit</td>
<td>Leave Asset Template, Major Purchase Class, Minor Purchase Class, Requested Delivery Date (or see #7 on Basic Tab), Late Delivery Date, and PO Code blank.</td>
</tr>
<tr>
<td>Account</td>
<td>Commodity Code populate from data entered on Basic tab.</td>
</tr>
<tr>
<td>Sub Account</td>
<td>Sourcing Event Required will populate from data entered on Basic tab.</td>
</tr>
<tr>
<td>Activity</td>
<td>Taxable defaults to “No”.</td>
</tr>
<tr>
<td>Account Category</td>
<td>Leave Tax Code blank.</td>
</tr>
<tr>
<td>Asset Code</td>
<td>Click Add to move items ordered to Requisition Lines.</td>
</tr>
<tr>
<td>Asset Template</td>
<td>To add additional lines, replace Item, Description, Quantity, UOM, Cost, and Accounting Unit, (and required fields from step #9 if account is changing), and select Add after each line to move to Requisition Lines.</td>
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</table>

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**Equipment Order – Warehouse Delivery**

Note: Reference Steps 9 and 14 in Requisition Set-up Steps. Ensure that “Deliver To” field on Basic tab has accurate description for final delivery. Ensure that “From Location” on Detail Profile tab has location 2100 entered for initial warehouse delivery.

1. Enter Item (required field) or SKU# of item if known.
2. Enter Description. (required field)
3. Item Type defaults to Special. For items that require receiving from ordering location, this is type needed.
4. Enter Quantity. (required field)
5. Enter UOM (Unit of Measure) (required field) or click the search box (magnifying glass to the right of the fields) to search.
6. Enter Cost. (required field)
7. Cost Default Vendor populates from Detail Profile tab.
9. Distribution Company, Accounting Unit, Account, Sub Account, Activity, and Account Category populate from data entered on the Accounting tab. Refer to Split Funding Steps below if item is to be charged to more than one account.
10. Leave Asset Template, Major Purchase Class, Minor Purchase Class, Requested Delivery Date (or see #7 on Basic Tab), Late Delivery Date, and PO Code blank.
11. Commodity Code and Sourcing Event Required populate from data entered on Basic tab.
12. Taxable defaults to “No”.
14. Click Add to move items ordered to Requisition Lines. To add additional lines, replace Item, Description, Quantity, UOM, Cost, and required fields from step #9 if account is changing). Select Add after each line to move to Requisition Lines.

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Change or Release Steps

1. Once items ordered are in Requisition Lines list, they can be deleted, changed, or released to the approver.

2. To delete a line click on the garbage can icon.

3. To change the Quantity, Description, UOM, or Cost of a line, click on the item # (Highlighted in blue).

4. A new screen will open. Any of the line item fields that were originally entered can be changed.

5. Once changes have been made, click on the Change button. The lines will be updated in the Requisition Lines list.

6. The icon indicates there is an error. Place your cursor over the icon for error details. Click on detail message to be routed to the tab where the error can be corrected. Then click on the Change button. The lines will be updated in the Requisition Lines list.

7. At the bottom of the Requisition Lines form, tabs are available to complete additional functions.

8. New will create a new Requisition. Clear will remove all data from existing Requisition, and Print will print the Requisition.

9. Once the order is complete, click the Release button to send order to the approver.
Split Funding Steps

1. A product or service order must first be entered. Once an item is available under Requisition Lines the item can then be split funded.

   NOTE: Reference Split Funding Rules at the end of this document.

2. Click on the item (in blue).

3. Select Line Accounting to change detail on account number.

4. In the Line Accounting screen, multiple accounting lines will appear displaying 100% of the expense assigned to one account string. Within this screen, several accounting numbers can now be entered to split the expense for the line by either Percent (must total 100), Quantity, or Amount.

5. Examples of split funding:

   - By percentage – example displays 50/50 split

   - By dollar amount – example displays $50 distribution to one account and $15.09 to a different account.
6. Once adjustment has been made, click the Change button to save changes.

![Change button highlighted]

### Split Funding Rules

A. Only one method of split funding can be applied to the entire order.

B. When splitting an order using the percentage methodology, the percentage must be rounded to a whole percentage point. (Example: Use 34% rather than 33.5%.)

C. A single asset cannot be split funded or charged to multiple accounts. For example, if an order consists of one single asset, such as a single computer, that one computer can only be charged to one account. However, if the order is for two computers, one computer can be charged to one account and the second computer can be charged to a different account.

D. Splitting a requisition can only be done at the line level and not on the requisition as a whole. If there are several items for a requisition, the funding split to multiple accounts should be determined and applied prior to releasing the order. Following are some options to consider.

**Split Funding Options to Consider if Multiple Items Exist for A Requisition:**

- If it is desired that the entire requisition is to be split funded with a specific split percentage, then the percentage split must be entered for each item.

- Determine if the lines of the overall order should be charged to different accounts to achieve the split funding desired.