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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- Draw Down Order for Goods
- Equipment Order – Warehouse Delivery
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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.
NOTE: All required fields will also have an asterisk (*) displayed next to the field name in Infor Lawson.

4. Select the Basic tab.

5. **Requisition Description** - Enter PP# (like 2001 or S000059) with description of goods ordered. (Example: 2001 FFE).

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, please be careful to clearly identify location name and room number.

10. **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”.

![Image of RQC interface](image-url)
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. Use your designated 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.

   **In PO User Field 1**
   
   3 for Facility Modernization

   **In Req Header User Field 1: Auto Approve (up to $4,999)**
   
   PM Name and parent project (Last name, all Caps, and 2001 or S000059)

   **In Req Header User Field 2: ($5,000 - $24,999)**
   
   Sr. PM/Planner Name and parent project (Last name, all Caps, and 2001 or S000059)

   **In Req Header User Field 3: ($25,000 - $99,999)**
   
   Director Name and parent project (Last Name, all Caps and 2001 or S000059)

   **In Req Header User Field 4: (Over $99,999)**
   
   Sr. Director Name and parent project (Last name, all Caps and 2001 or S000059)

   **In Req Header User Field 5: (Over $249,999)**
   
   Executive Director Name and parent project (Last Name, all Caps and 2001 or S000059)
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. Enter comments in the **free form field**.
   **Note:** Facility Modernization Department utilizes a “Requisition Request Form”. Information from the electronic form will be used to enter comments into the **Comments Tab**. Select the “Comments to Print on Requisitions” and “Comments to Print on Purchase Orders”. (Copy and paste comments one at a time.)

**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.
e. **Parent Project # and school/location** can be entered here to ensure it is printed on the requisition and/or purchase order.

30. Click **Update** after comments are entered.

31. 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)
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. (Receiving Required)
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 Activity. (Example Distribution Company: 0041 for Bond, 0043 for CRF, or 0022 for Grants)
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 required fields from step #9 if account is changing), and select Add after each line to move to Requisition Lines.

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Purchase Requisition for Goods
Facility Modernization

### Draw Down Order for Goods

1. Enter **Item** *(required field)* or SKU# for item if known.

2. Enter **Description** *(required field)*.

3. **Item Type** defaults to **Special**.

4. Enter **Quantity** *(required field)*. Note that quantity is the anticipated **total cost**. This is based on a cost of each item equal to $1. This allows the receiving to be on the dollar value of each delivery.

5. Enter **UOM** *(Unit of Measure)* *(required field)*. Unit of Measure for Draw Down Requisitions is **LT**.

6. Enter **Cost** *(required field)* of 1 (Representing $1 per item).

7. **Cost Default Vendor** populate from data entered on the Detail Profile tab.

8. Leave **Purchase From** and **Currency Code** blank.

9. **Distribution Company, Accounting Unit, Account, Sub Account, Activity, and Account Category** populate from data entered on the Accounting tab. Refer to **Activity**. (Example Distribution Company: 0041 for Bond, 0043 for CRF, or 0022 for Grants)

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** populate 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.

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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Equipment Order – Warehouse Delivery

1. Reference Step 9 from Basic Tab and Step 14 from Detail Profile Tab. 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.

2. Enter **Item (required field)** or SKU# of item if known.

3. Enter **Description. (required field)**

4. **Item Type** defaults to Special. For items that require receiving from ordering location, this is type needed.

5. Enter **Quantity. (required field)**

6. Enter **UOM** (Unit of Measure) **(required field)** or click the search box (magnifying glass to the right of the fields) to search.

7. Enter **Cost. (required field)**

8. **Cost Default Vendor** populates from Detail Profile tab.

9. Leave **Purchase From** and **Currency Code** blank.

10. **Distribution Company**, **Accounting Unit**, **Account**, **Sub Account**, **Activity**, and **Account Category** populate from data entered on the **Accounting** tab. Refer to Activity. (Example Distribution Company: 0041 for Bond, 0043 for CRF, or 0022 for Grants)

11. 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.

12. **Commodity Code** and Sourcing Event Required populate from data entered on Basic tab.

13. **Taxable** defaults to “No”.


15. 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.