**Purchase Requisition for Services in Infor Lawson**

<table>
<thead>
<tr>
<th>Form or Screen: Infor Lawson Requisition Center</th>
<th>Updated 10/26/16</th>
<th>QRG Doc.#: Q.RQ.004</th>
</tr>
</thead>
</table>

**Business Objective:** An order is first entered into the 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 Services requisition is the most commonly used form for placing a purchase order for services (non-hard goods or merchandise).

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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.
Purchase Requisition for Services in Infor Lawson

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

10. Enter Commodity code (required field). Click the search box (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”.
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.

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.)


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” in The Commons Financial Services Resource Center for a cross-reference of commodity codes to DPS Buyer).

18. PO Code, Taxable, and Tax Code remain blank.

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 the search box (magnifying glass 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 PO Date – Headline with “Note to Buyer” and note there is a critical date with the exact required commencement of services.

31. Click Update after comments are entered.

32. To order services click the Special/Service option in the menu bar.

   There are typically two categories of orders that can be placed with a vendor for services. Both categories can apply to corporate service providers or independent contractors.

   The order entry process is the same for either order type.

   a. General Service Order
      Any single order from a vendor for one time provision of service. (Example: Charter bus service for a single excursion)

   b. Draw Down Service Order
      A requisition created for multiple purchases of the same service type over time. (Example: Loomis Armored Car Service)
Order Detail Steps

1. In Item field (required field) enter type of service vendor will provide.

2. Enter Description. (required field)

3. Select Amount Service from drop down for Item Type

4. Enter Quantity The Default quantity is 1.

5. Enter UOM (Unit of Measure) (required field) Unit of Measure for services is LT.

6. Enter Cost (required field) – The amount entered should be the total cost or dollar amount of the requisition.

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 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 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 changing accounts) and select Add after each line to move to Requisition Lines.
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 to allow for changes marked by a red *.

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 the requisition 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.

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Item</th>
<th>Description</th>
<th>UOM</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1,000</td>
<td>1064</td>
<td>COLORED BUTCHER PAPER RO</td>
<td>EA</td>
<td>25.00</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Account</th>
<th>Activity</th>
<th>Account Category</th>
<th>Distribution Company</th>
<th>Asset Template</th>
<th>Asset Code</th>
<th>Percent</th>
<th>Quantity</th>
<th>Amount</th>
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<td>10021010</td>
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**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 of 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.