### Purchase Requisition for Services

#### Facility Modernization

**Author/Owner:** Financial Services Training

<table>
<thead>
<tr>
<th>Form or Screen: Infor Lawson Requisition Center</th>
<th>Updated 2/15/17</th>
<th>QRG Doc.#: Q.RQ.006</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).

### Table of Contents

- Requisition Set-up Tabs
- Order Detail Steps

### 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
Facility Modernization

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 work to be performed. (Example: 2001 Construction)

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.)*

16. **Purchase From** and **Currency Code** 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 the designated Facilities buyer and technology Buyer for Facility Modernization.


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.

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

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.

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 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.