Lawson Requisition Center – Web Entry Procedures

The Lawson Requisition Center (RQC) is an online application used to create purchase requisitions. RQC users can be established as either a **Requester** (a user who places orders) or an **Approver** (a user who approves orders). A requester may only have one approver but a single approver can approve for many requesters.

RQC Access is established by individual accounting unit for each user. To request new, revised, or additional access to RQC, a [Lawson/Webfocus Access Request Form](https://www.luc.edu/finance/forms.shtml) should be submitted to FinancialSystems@luc.edu. The form and instructions can be located at [https://www.luc.edu/finance/forms.shtml](https://www.luc.edu/finance/forms.shtml) under the Lawson/WebFocus Forms section.

**Procedures:**

1. Log into Lawson at [https://lawson.luc.edu](https://lawson.luc.edu)
   
   If you don’t see the Menu, click on the 3 bars

2. Click on Bookmarks > Requisition Center

3. Click on Shopping
4. Complete “Basic Screen Tab” for selected Requester
   Note: If the Basic Screen is blank, click the “New” button at the bottom

5. Enter Requisition description (Short Description, i.e. “Office Supplies”)

6. Company (defaults to 9100)

7. Requesting Location (defaults to Requester’s standard location or can search for alternative locations)

8. Enter Requested Delivery Date (a blank field will default to 7 days from the requisition approval date)

9. Priority Field (no entry required)

10. Enter Deliver to information (Recommended style: Building/Room, Name, Telephone Extension)
11. Complete “Detail Profile Tab”

12. Enter Cost Default Vendor – i.e., Vendor # (drop down search by vendor name or number – See item number XX for search instructions).

13. Select Buyer PUR if it has not defaulted
14. Complete "Accounting Profile Tab" (Accounting Unit is defaulted for each Requester. You can change this if other AU’s are assigned to Requester).

15. Enter the following:

   Accounting Unit (if different from default),

   Account (i.e. 6100 = Supplies; a list of Account Codes can be found at the following online here.)

   Activity and Account Category (if necessary)

   If you have multiple Accounting Units or Accounts that need to be charged for your request, please refer to item number 34 below for detailed instructions.
16. Complete “Comments” Tab to print on Req’s, P.O.’s, etc by selecting the option “Comments to Print on Purchase Orders” and then clicking on Update. (Note: Comment Code can be left blank). You may need to scroll down to the update button.

17. Select on navigation bar and select Specials/Services:
18. **Enter Item #** (Please use the exact naming convention of the vendor and include any special characters and spacing. For services, please use a short description of the service being provided)

19. **Enter Description** (i.e. Folding Hand Truck)

20. **Enter Item Type**
   a. **Special** – Use this for goods or items purchased – this is the default option
   b. **Service Amount** – Use this for a draw-type arrangement (i.e., $10,000 PO with sporadic and varying dollar invoices for payment)
   c. **Service Quantity** – Use this for a routine payment arrangement (i.e., 12 monthly payments at $500 per payment)

21. **Enter Quantity**

22. **Enter UOM**
    (Unit of Measure)

23. **Enter Unit Cost**

24. **Enter Cost Default Vendor**

25. **Enter Accounting Unit**

26. **Enter Account**
27. Click on Add after reviewing entered information. If order is complete go to number 29.
   If additional items need to be added to the order, clear out the information for Item #, Description, Quantity, Unit of Measure, Cost and replace with the next item’s information.

   You can also change the Accounting Unit, Account, Activity or Account Category if necessary (Using only those AU’s that you have access to use).

28. In some instances, you may receive an error message if there is a problem with one of your requisition lines.
   If you hover your mouse over the explanation point ( ), you will see a description of what the error is. An example of such an error is as follows:
29. If you need to make changes to clear an error, click on link of the item name.

30. Click on **Print** to review your requisition after all items have been entered.

31. Click on **Release** if Requisition information is complete and correct

32. After Release, pop up window appears with Date/Time and indication the requisition has been successfully submitted.

33. Requisition Status: Needs Approval (Designated Manager reviews/approves the requisition)
34. **Multiple Distributions**: if your requisition requires multiple distributions, you must first add the line to your requisition. Once added, you can click on the Item description (see #29) in order to update any information on the line, including adding multiple distributions.

35. From the Requisition Lines Detail screen, click on the **Line Accounting Tab** to add your multiple distribution lines. These lines can be added as a straight dollar amount or as a percentage to total line.

36. Once Complete, click on **Change**.
Find the Status of Web Requisitions:

Click on Bookmarks > Requisitions Center > Status

Your Requester ID, Requesting Company, and Requesting Location auto populate by default.

Click “List Requisitions” to display a list of your requisitions by status.

Note: you can view your approver on this screen by clicking on the Approval Info Icon

To view requisition line Information, including the Purchase Order #, click on the Document Icon.
Common requisition status codes are:

- **Unreleased** – the requisition needs to be released by the requester (see #31)
- **Released** – the requisition has been released but has not been approved
- **Rejected** – the requisition has been rejected by the approver
- **Processed** – the requisition has been approved
  
  *Note: a PO Number will be generated within 1 hour after approval*

- **Closed** – all items have been received and invoices have been paid
Adding information to an unreleased requisition:

By default, the requisition center will load the last requisition that you created. If you clicked on New it will create a new requisition. To find existing unreleased requisitions, follow the steps below.

1. Click on Shopping
2. Click on Inquire
3. Check only unreleased. Everything will be check marked by default
4. Click on the Pencil Icon next to the requisition you want to update.

5. To update the information on the rec. Click on the item line link.
6. Update the any field you would like and click on the change button. For example to update the quantity:

<table>
<thead>
<tr>
<th>RQC</th>
<th>Requisition: 1179958</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Home</strong></td>
</tr>
<tr>
<td><img src="change.png" alt="Change" /></td>
<td><img src="number.png" alt="6" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.00</td>
<td>REC5</td>
</tr>
</tbody>
</table>

7. To complete the requisition, click **Release**.