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.

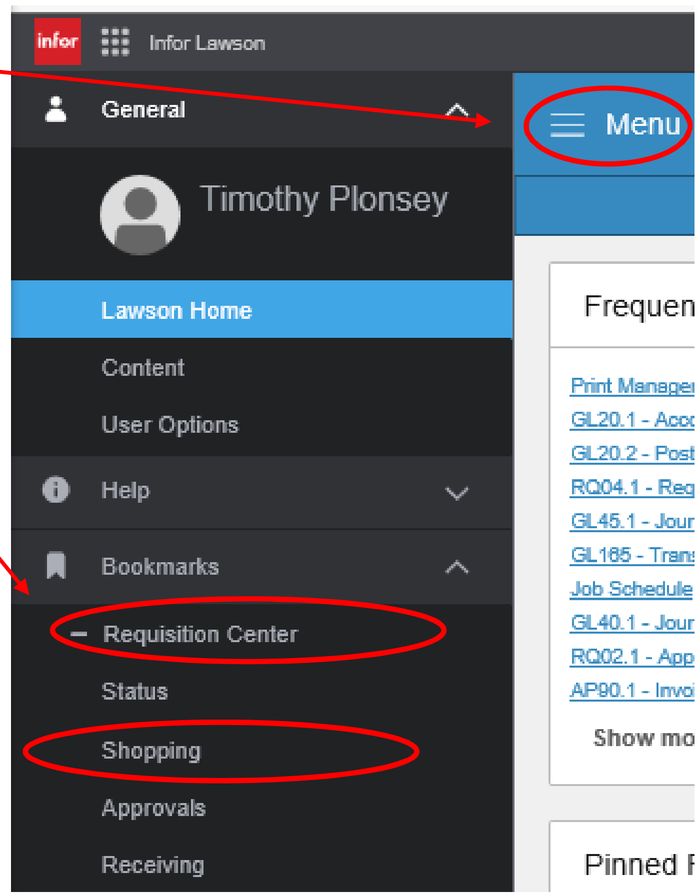
RQC Access is established by individual accounting unit for each user. To request new, revised, or additional access to RQC, a Lawson/Webfocus Access Request Form should be submitted to FinancialSystems@luc.edu. The form and instructions can be located at https://www.luc.edu/finance/forms.shtml under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

Procedures:

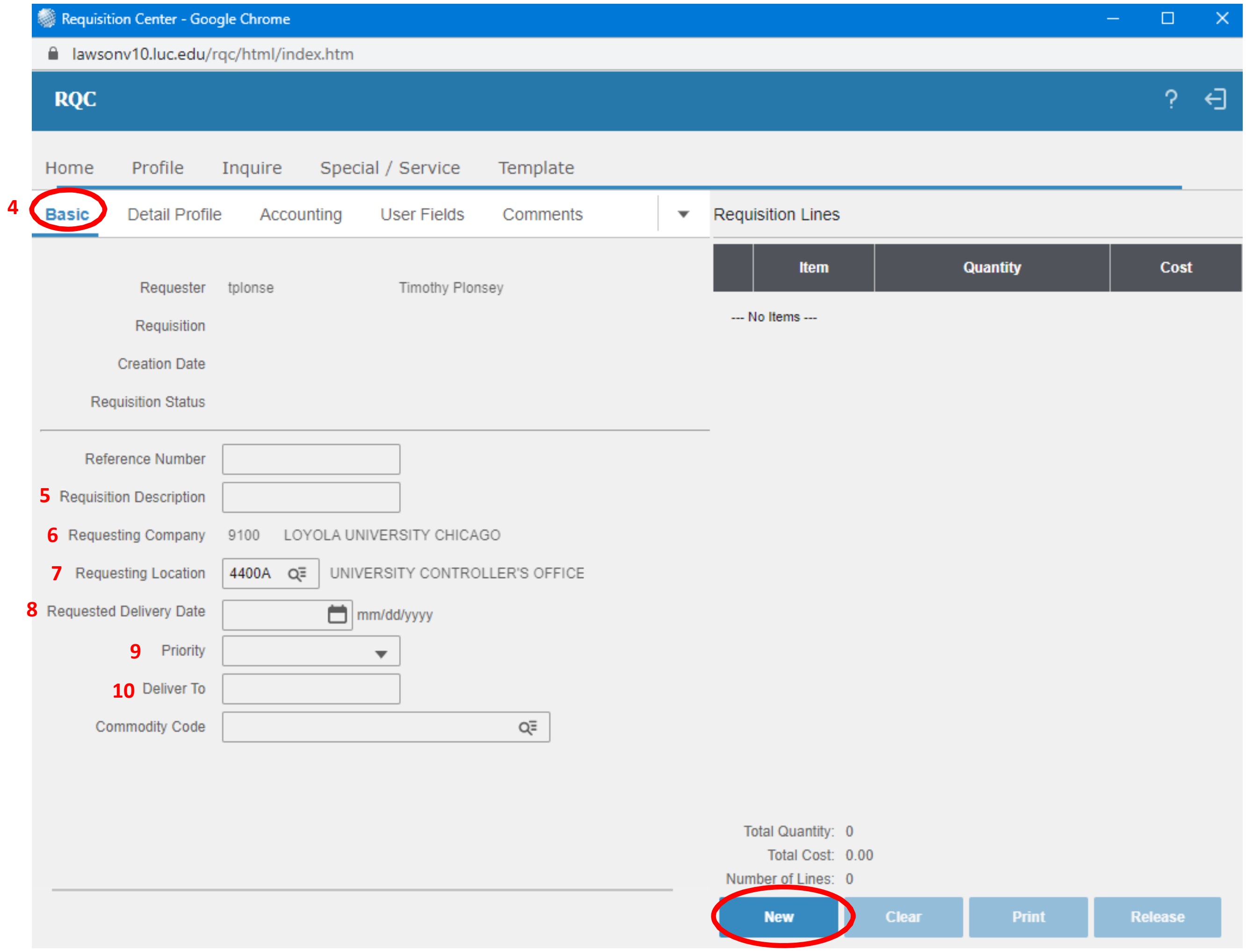
1. Log into **Lawson** at https://lawson.luc.edu
   If you don't see the Menu, click on the 3 bars

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)

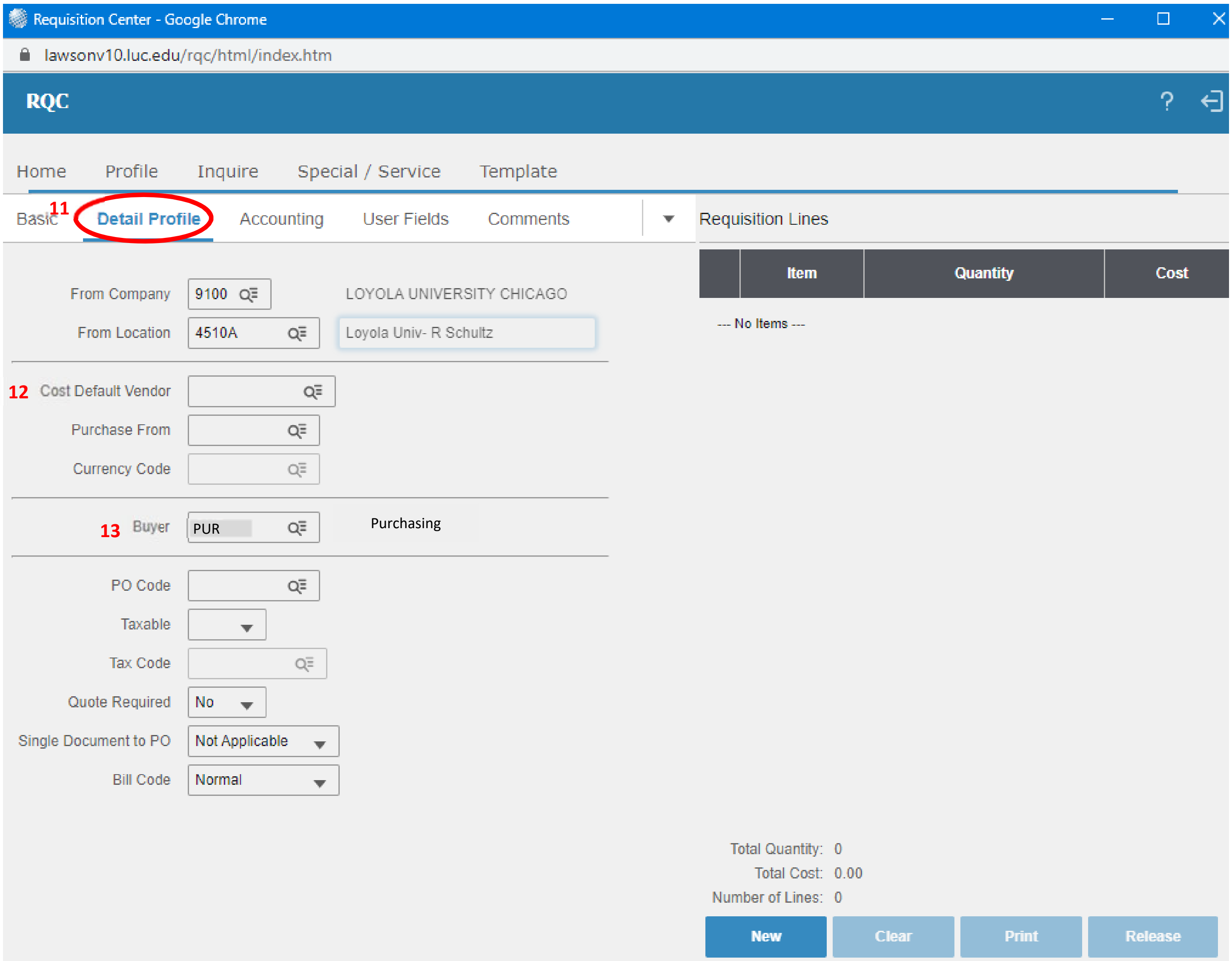
9. **Priority Field** (no entry required)

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



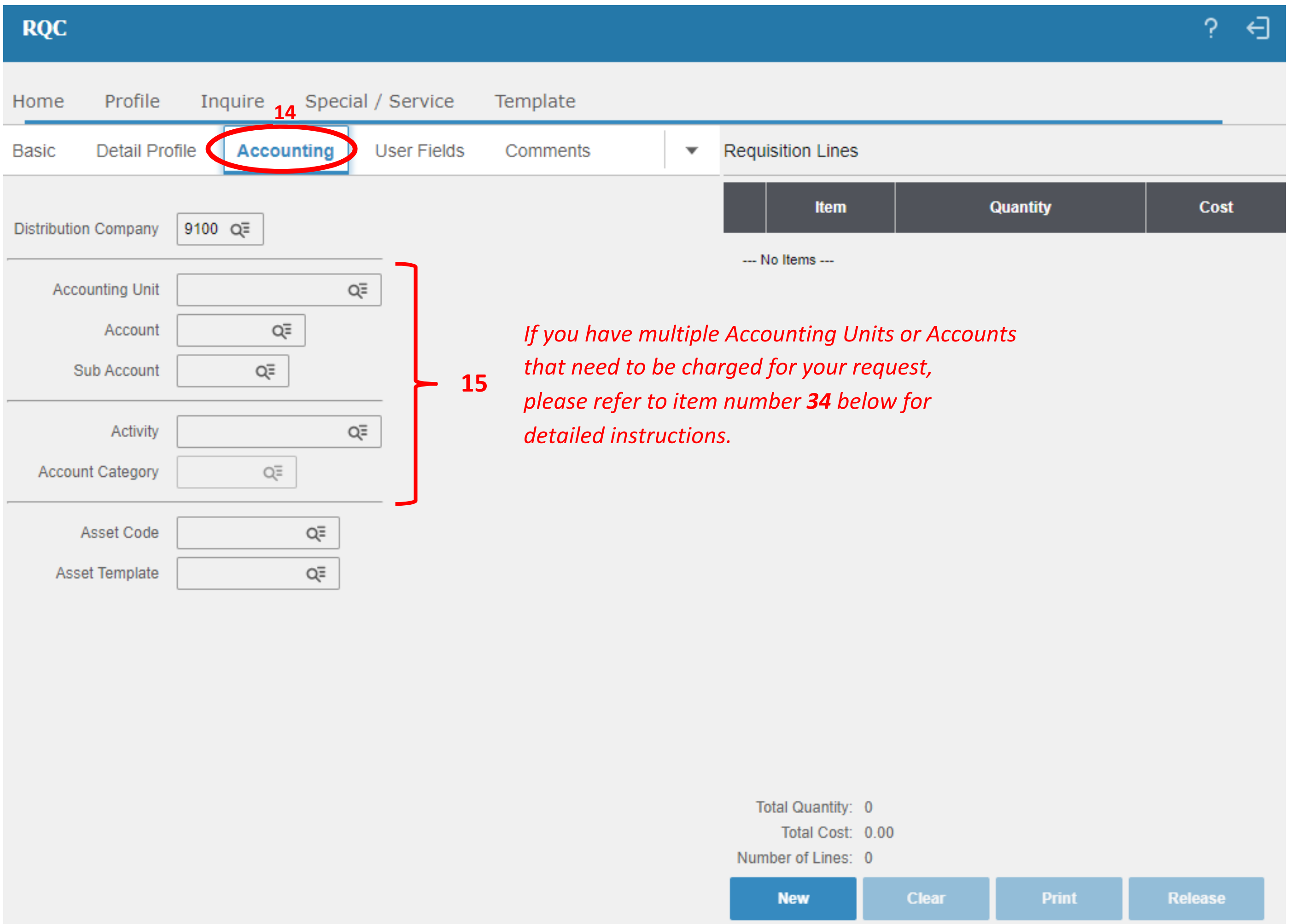
14. Complete "**Accounting Profile Tab"** (Accounting Unit is defaulted for each Requester. You can change this if other AU's are assigned to Requester).

15. Enter the following:

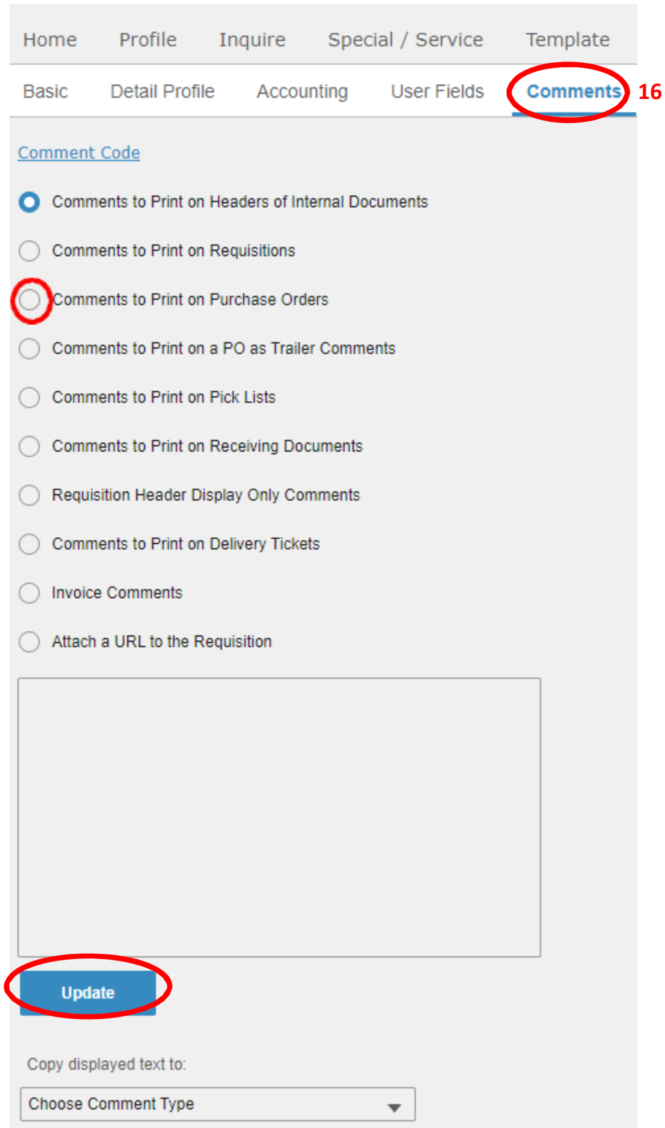
    Accounting Unit (if different from default),

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

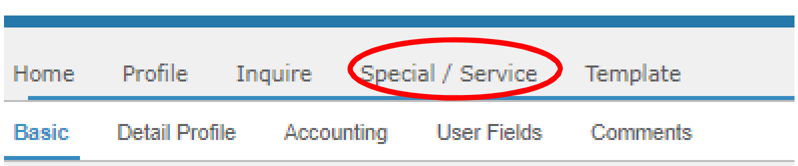
    Activity and Account Category (if necessary)



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**

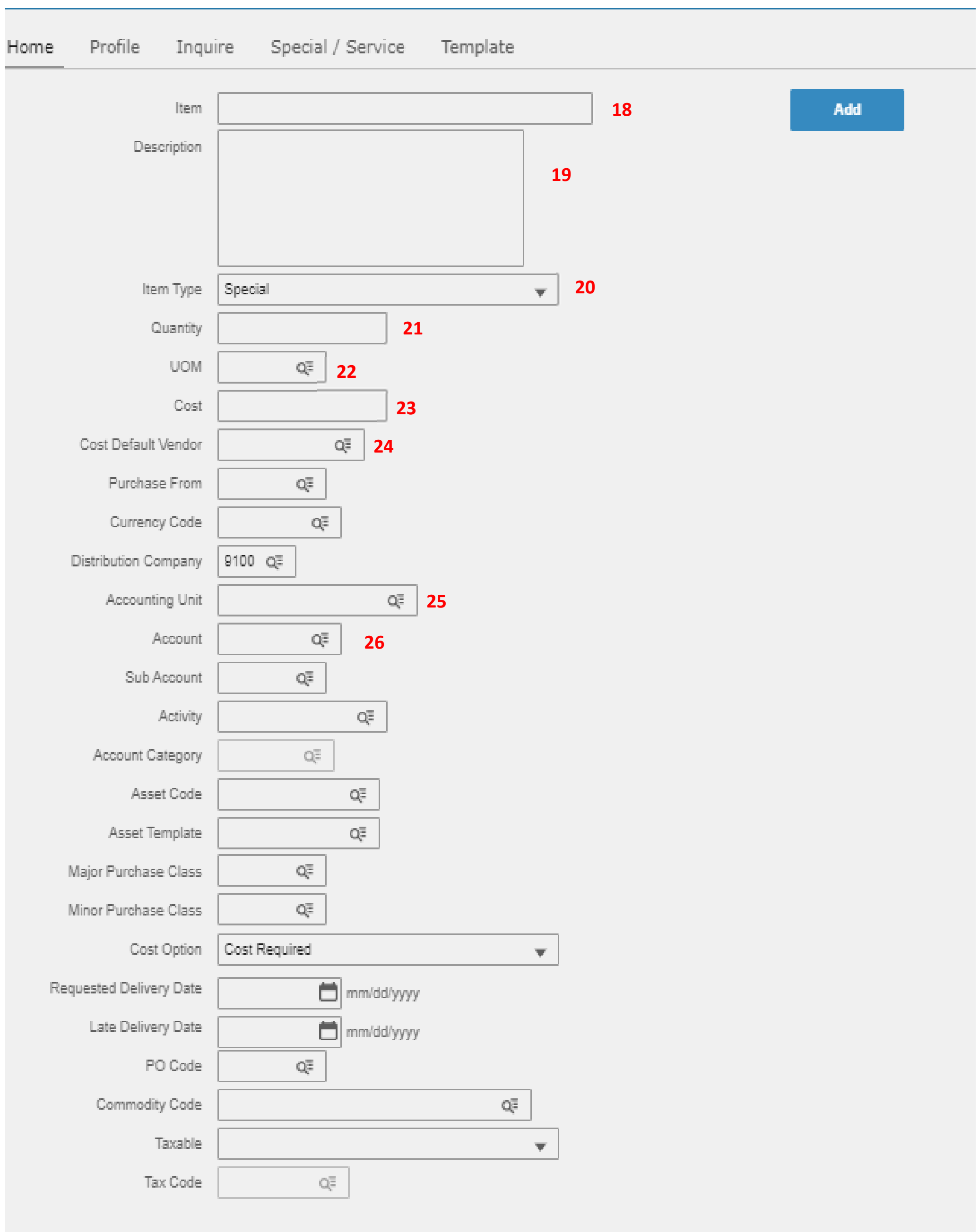
22. Enter **UOM** (Unit of Measure)

23. Enter **Unit Cost**

24. Enter **Cost Default Vendor**

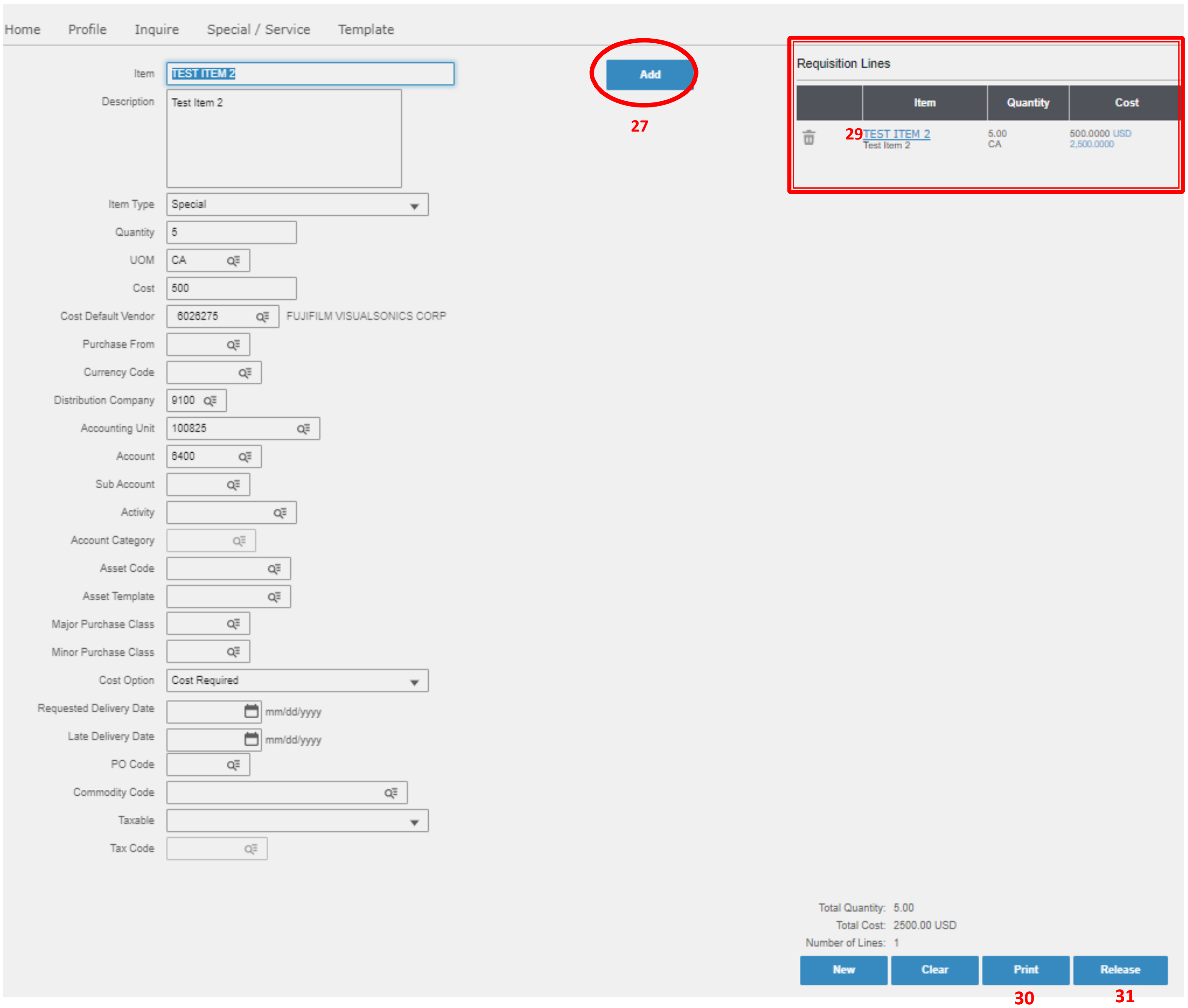
25. Enter **Accounting Unit**

26. Enter **Account**

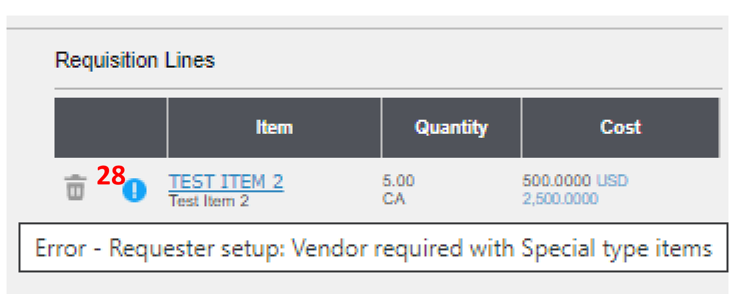


27. Click on **Add** after reviewing entered information. If order is complete go to number 29.
If additional items need to be added to the order, clear out the information for Item #, Description, Quantity, Unit of Measure, Cost and replace with the next item's information.

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.

Company 9100 - LOYOLA UNIVERSITY CHICAGO

Requesting Location 4400A - UNIVERSITY CONTROLLER'S OFFICE

Requisition 1175958 - Unreleased

Purchase From

Buyer CKR - Check Req. Buyer

Cost Default Vendor

Requisition Description

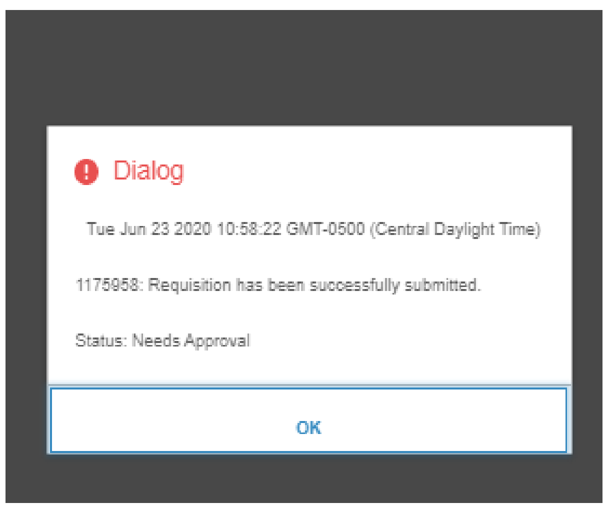
Requester tplonse - Timothy Plonsey

Deliver To

Item	Item Type	Quantity Ordered	UOM	Unit Cost	Extended Cost	Distributions	Activity / Account Category	Distribution Allocation	Requested Delivery Date	Sourcing Event Required
TEST ITEM 2	Special	5.00	CA	500.0000	2500.0000	100825-006400-0000		100.0%		No
Test Item 2 Vendor : FUJIFILM VISUALSONICS CORP Gtin : 00000000000000										
Totals: 1 Lines		**5.00**			**2500.00 USD**					

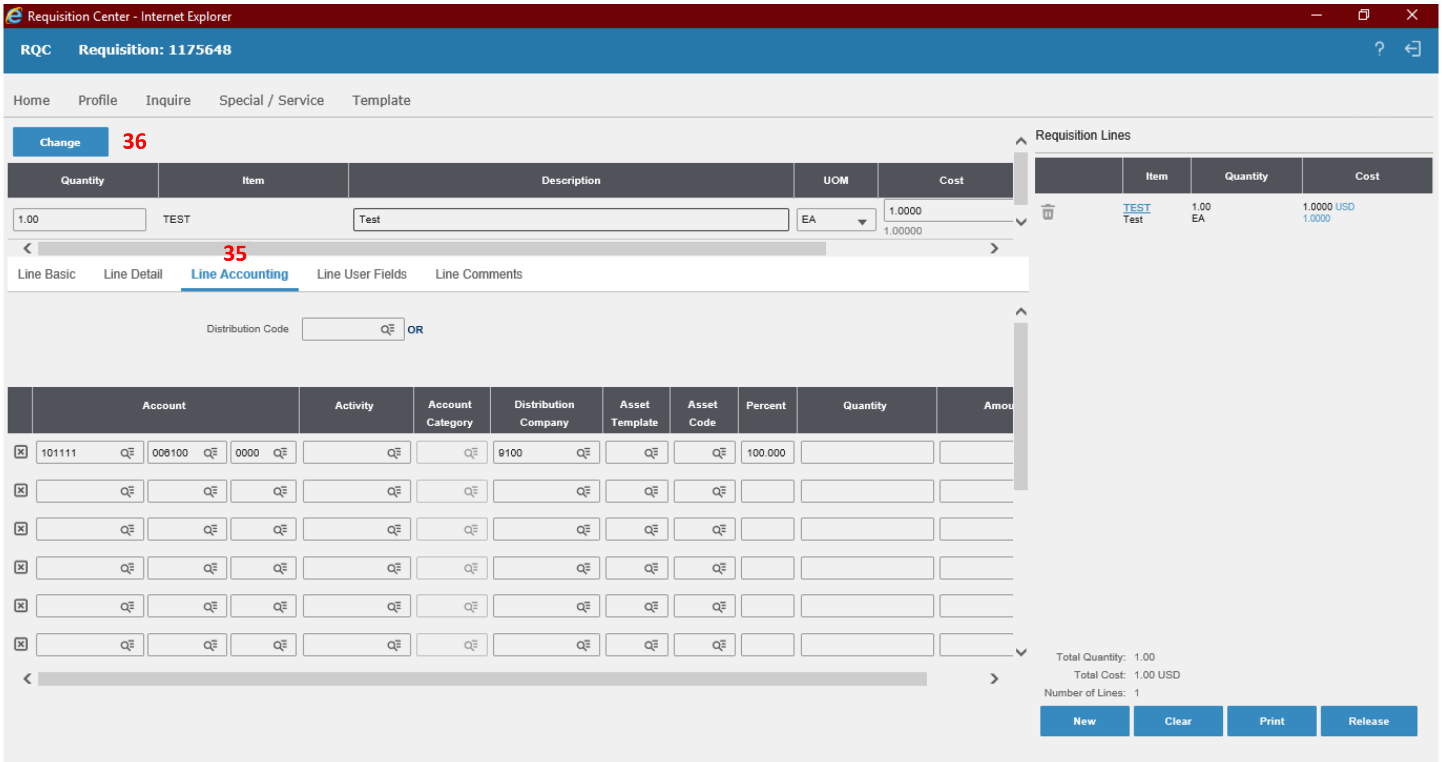
31. Click on **Release** if Requisition information is complete and correct

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.

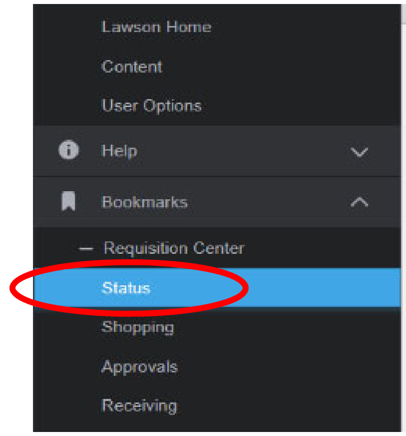


35. From the Requisition Lines Detail screen, click on the **Line Accounting Tab** to add your multiple distribution lines. These lines can be added as a straight dollar amount or as a percentage to total line.

36. Once Complete, click on **Change**.

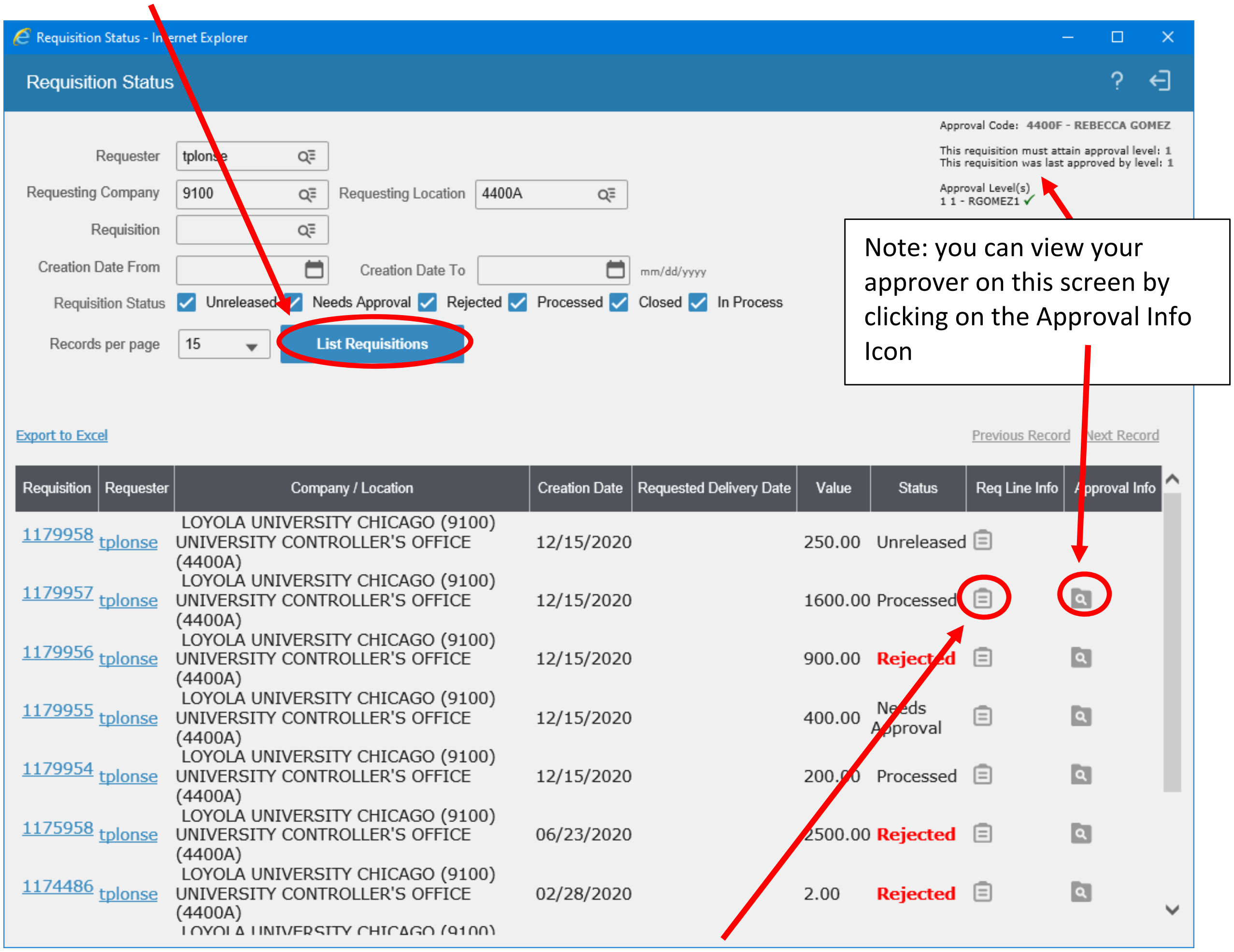
Find the Status of Web Requisitions:

Click on Bookmarks > Requisitions Center > Status

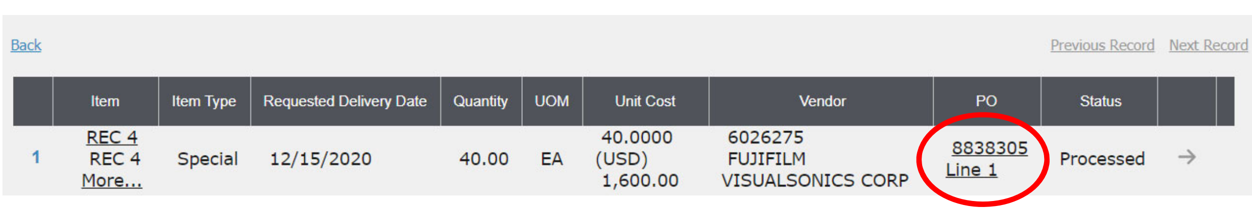


Your Requester ID, Requesting Company, and Requesting Location auto populate by default.

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



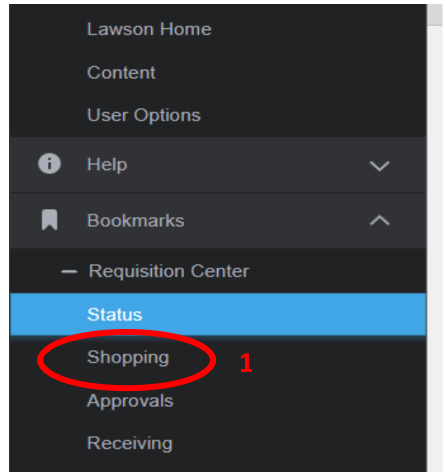
To view requisition line Information, including the Purchase Order #, click on the Document Icon.



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 been generated within 1 hour after approval
- **Closed** – all items have been received and invoices have been paid

Adding information to an unreleased requisition:



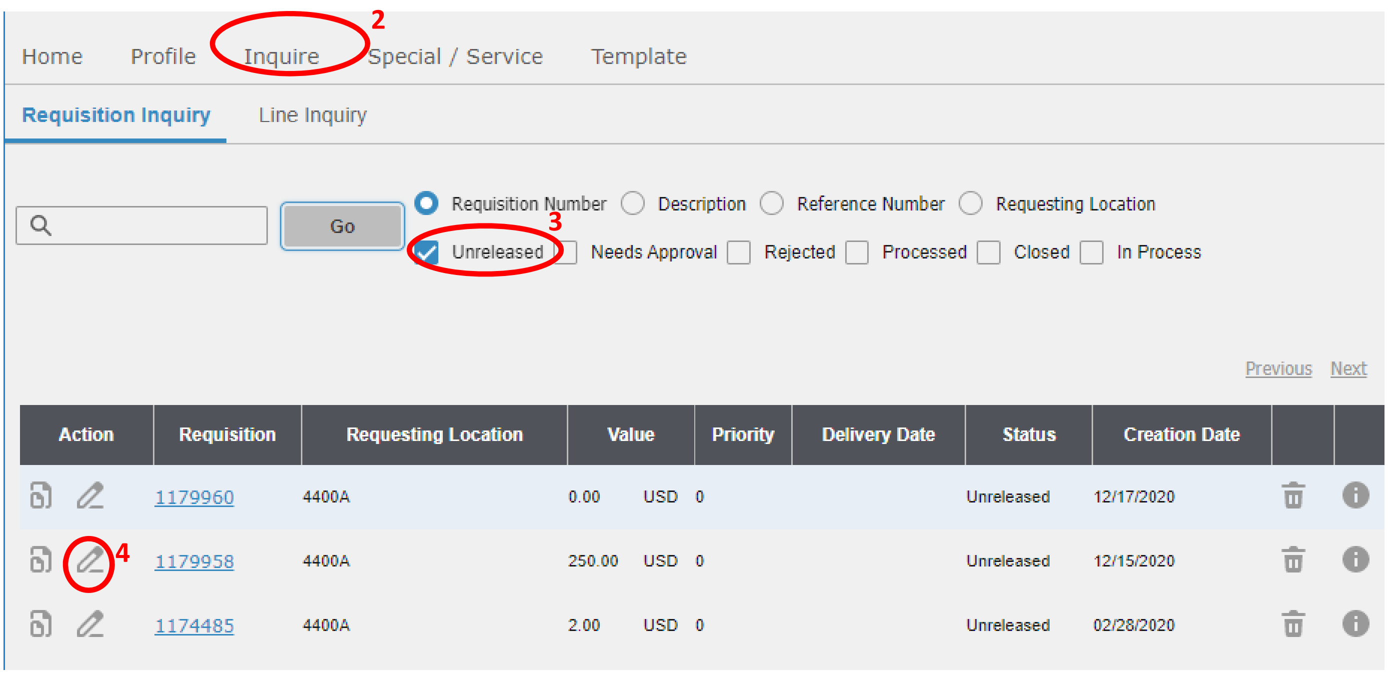
By default, the requisition center will load the last requisition that you created. If you clicked on **New** it will create a new requisition. To find existing unreleased requisitions, follow the steps below.

1. Click on **Shopping**

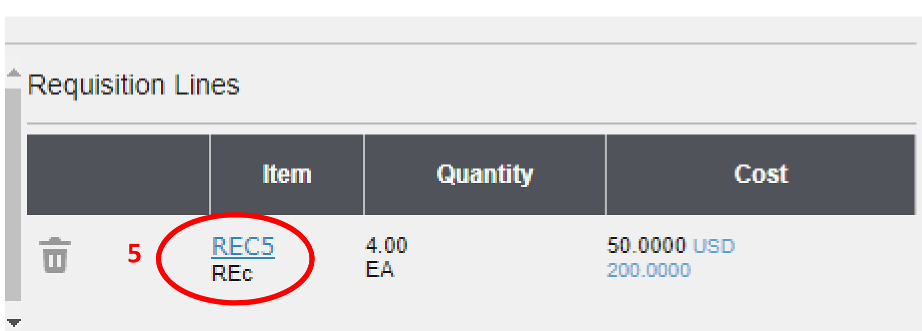
2. Click on **Inquire**

3. **Check only unreleased**. Everything will be check marked by default

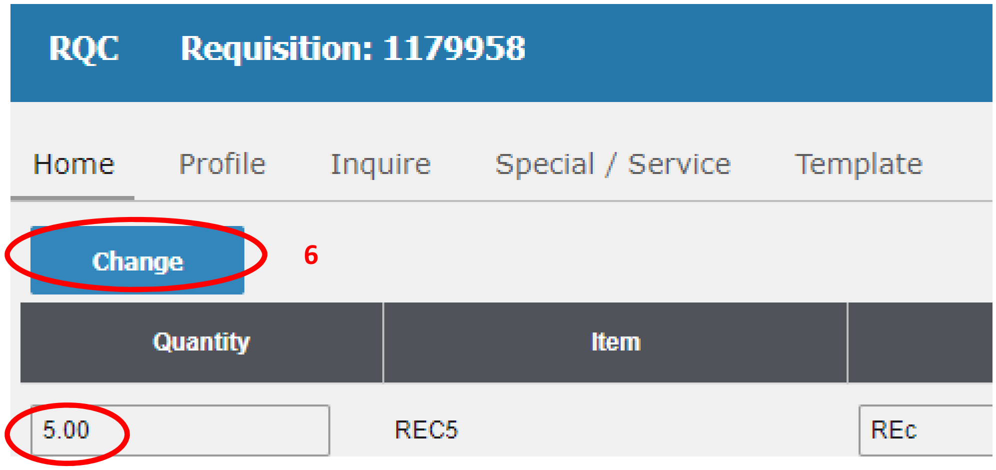
4. Click on the **Pencil Icon** next to the requisition you want to update.



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:



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