



Lawson Requisition Center – Web Entry Procedures

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Introduction

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 [System 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 Financial Applications Forms section.

Signature Authority

If the Requester has Signature Authority and is authorized to approve purchases for the AUs on their profile, they can be established as an Approver and approve their own requisitions. However, each

Approver record should also have a secondary Approver for purchases over \$5,000 to comply with the policy for [Approving requests over \\$5k](#).

Purpose

Most Departmental ordering should be accomplished using Lawson Requisition Center working through the Purchasing Department. Purchase Requisitions / Purchase Orders provide for better control, tracking, and approval of University expenditures.

While not all-inclusive, the following examples illustrate the types of goods and services that should be purchased using a Lawson Requisition Center:

- Furnishings of any type
- Computers (PC and Laptops) and Tablets
- Computer Peripherals
- Computer Software and Licensing
- Contracted or Professional Services in excess of \$5,000 (subject to workers classification evaluation)
- Equipment and Appliances
- Mail Services
- Printing Services
- Research Supplies (medical and academic)
- Copy Machines, Facsimile and Telecommunication Equipment
- Automobile purchase or lease
- Animals

Login Screen

Navigate to the Electronic Payment Requisition Application at <https://lawson.luc.edu>.

Enter your Loyola email address and the next screen will ask for your password. Finally, click Sign In



Sign in

Email Address

Next

Lawson Menu

From the Lawson Menu you can:

- Start a new requisition
- Resume a requisition draft
- View status of existing requisitions

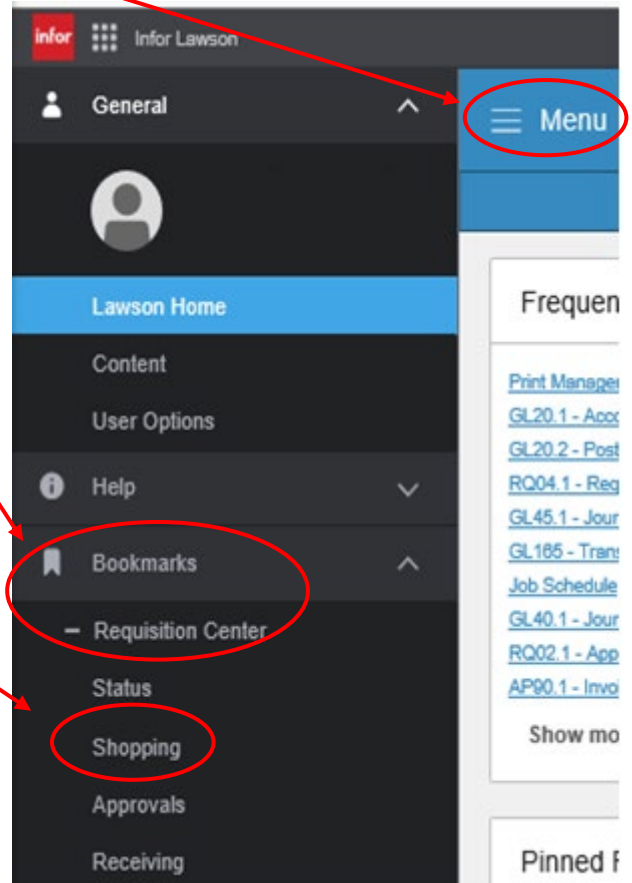
- Approvers can approve requisitions

Start a New Requisition

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**



Section 1: Basic Tab

4. Complete “**Basic Screen Tab**” for selected Requester

Note: If the Basic Screen is blank, click the “New” button at the bottom

The screenshot shows the Requisition Center (RQC) interface in Google Chrome. The browser address bar shows the URL lawsonv10.luc.edu/rqc/html/index.htm. The RQC logo is in the top left corner. The navigation menu includes Home, Profile, Inquire, Special / Service, and Template. The 'Basic' tab is selected and highlighted with a red circle. The main content area displays the 'Detail Profile' for a requisition. The 'Requester' is Timothy Plonsey. The 'Requisition Lines' table is empty, showing '--- No Items ---'. The form fields are numbered 5 through 10: 5 Requisition Description, 6 Requesting Company (9100 LOYOLA UNIVERSITY CHICAGO), 7 Requesting Location (4400A UNIVERSITY CONTROLLER'S OFFICE), 8 Requested Delivery Date (mm/dd/yyyy), 9 Priority, 10 Deliver To, and Commodity Code. At the bottom right, there are buttons for 'New', 'Clear', 'Print', and 'Release'. The 'New' button is highlighted with a red circle. Summary statistics at the bottom right show: Total Quantity: 0, Total Cost: 0.00, and Number of Lines: 0.

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

Section 2: Detail Profile

11. Complete “**Detail Profile Tab**”
12. Enter **Cost Default Vendor – i.e., Vendor #** (drop down search by vendor name or number – See *itemnumber* **XX** for search instructions).
13. Select **Buyer PUR**

Requisition Center - Google Chrome
lawsonv10.luc.edu/rqc/html/index.htm

RQC

Home Profile Inquire Special / Service Template

Basic **11** **Detail Profile** Accounting User Fields Comments

From Company 9100 LOYOLA UNIVERSITY CHICAGO
From Location 4510A Loyola Univ- R Schultz

12 Cost Default Vendor
Purchase From
Currency Code

13 Buyer PUR Purchasing

PO Code
Taxable
Tax Code
Quote Required No
Single Document to PO Not Applicable
Bill Code Normal

| Item | Quantity | Cost |
|------------------|----------|------|
| --- No Items --- | | |

Total Quantity: 0
Total Cost: 0.00
Number of Lines: 0

New Clear Print Release

Section 3: Accounting Tab

14. Complete the "Accounting" tab. The Accounting Unit is pre-filled for each Requester and can be modified if additional AUs are assigned to the 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) *

* To create a requisition for a Capital Activity, email FinancialSystems@luc.edu to request the temporary addition of AU 190027 to your profile. For security reasons, AU 190027 is not kept on RQC profiles long-term, as it is the main University AU. Once the requisition has been approved, please notify Financial Systems that 190027 can be removed.

RQC

Home Profile Inquire **14** Special / Service Template

Basic Detail Profile **Accounting** User Fields Comments Requisition Lines

Distribution Company 9100 Q≡

Accounting Unit Q≡

Account Q≡

Sub Account Q≡

Activity Q≡

Account Category Q≡

Asset Code Q≡

Asset Template Q≡

15

--- No Items ---

Total Quantity: 0
Total Cost: 0.00
Number of Lines: 0

New Clear Print Release

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.

Section 4: Comment Tab

16. Select the “**Comments**” tab to print on Req’s, P.O.’s, etc. (Note: Comments can be left blank)
 - a. Select the radio button for “**Comments to Print on Purchase Orders**”.
 - b. Add a Comment **Title**
 - c. Add Comment Text
 - d. Click on **Add** (You may need to scroll down to the update button).

Home Profile Inquire Special / Service Template

Basic Detail Profile Accounting User Fields **Comments** 16

[Comment Code](#) [View Comments](#) [Add Comment](#)

Comments to Print on Headers of Internal Documents

Comments to Print on Requisitions

Comments to Print on Purchase Orders

Comments to Print on a PO as Trailer Comments

Comments to Print on Pick Lists

Comments to Print on Receiving Documents

Requisition Header Display Only Comments

Comments to Print on Delivery Tickets

Invoice Comments

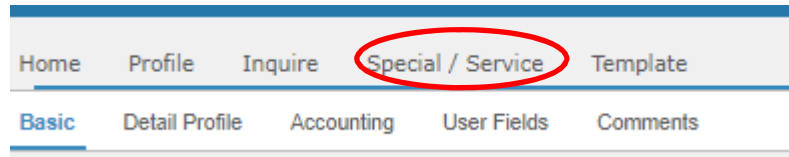
Title

Text

Add

Section 5: Specials / Services

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, 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**

The screenshot shows the 'Special / Service' form with the following fields and callouts:

- Item: 18
- Description: 19
- Item Type: 20
- Quantity: 21
- UOM: 22
- Cost: 23
- Cost Default Vendor: 24
- Accounting Unit: 25
- Account: 26

Other fields visible include: Purchase From, Currency Code, Distribution Company, Sub Account, Activity, Account Category, Asset Code, Asset Template, Major Purchase Class, Minor Purchase Class, Cost Option, Requested Delivery Date, Late Delivery Date, PO Code, Commodity Code, Taxable, and Tax Code.

Section 6: Release a Requisition

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).

The screenshot shows a requisition form with various fields for item details. A blue 'Add' button is circled in red with the number '27' below it. To the right, a 'Requisition Lines' table is highlighted with a red border. The table contains one line item with a trash icon, the number '29', the item name 'TEST ITEM 2', a quantity of '5.00 CA', and a cost of '500.0000 USD' (with a sub-total of '2,500.0000').

| Requisition Lines | | | |
|-------------------|-------------------------------|------------|----------------------------|
| | Item | Quantity | Cost |
| | 29 TEST ITEM 2 Test Item 2 | 5.00 CA | 500.0000 USD 2,500.0000 |

Total Quantity: 5.00
Total Cost: 2500.00 USD
Number of Lines: 1

Buttons: New, Clear, Print, Release

30 31

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:

The screenshot shows a requisition line with a trash icon, an info icon, and the number '28'. The line item is 'TEST ITEM 2' with a quantity of '5.00 CA' and a cost of '500.0000 USD' (with a sub-total of '2,500.0000'). Below the table, an error message is displayed in a box: 'Error - Requester setup: Vendor required with Special type items'.

| Requisition Lines | | | |
|-------------------|----------------------------|------------|----------------------------|
| | Item | Quantity | Cost |
| 28 | TEST ITEM 2 Test Item 2 | 5.00 CA | 500.0000 USD 2,500.0000 |

Error - Requester setup: Vendor required with Special type items

29. To make changes to clear an error, click on the blue link of the item name.

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

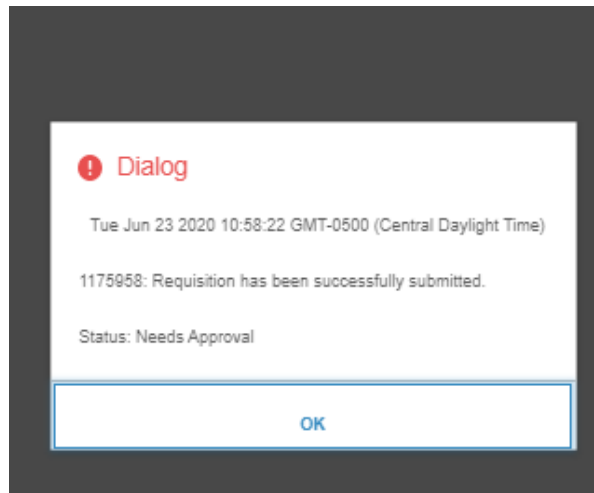


| | |
|--|--------------------------------|
| Company 9100 - LOYOLA UNIVERSITY CHICAGO | Cost Default Vendor |
| Requesting Location 4400A - UNIVERSITY CONTROLLER'S OFFICE | Requisition Description |
| Requisition 1175958 - Unreleased | Requester |
| Purchase From | Deliver To |
| Buyer CKR - Check Req. Buyer | |

| 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 : 000000000000000 | | | | | | | | | | |
| 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)

Section 7: Multiple Distributions

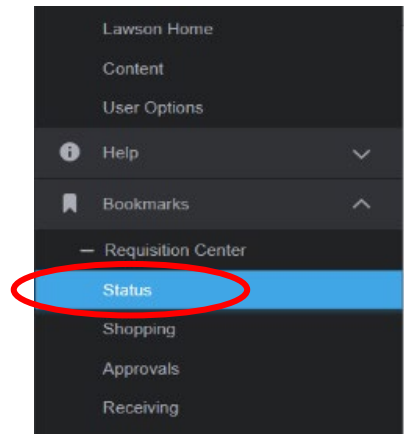
34. **Multiple Distributions:** if your requisition requires multiple distributions, you must first add the line to your requisition. Once added, you can click on the Item description (see #29) in order to update any information on the line, including adding multiple distributions.

The screenshot displays the 'Requisition Center - Internet Explorer' interface. At the top, the browser title is 'Requisition Center - Internet Explorer' and the page title is 'RQC Requisition: 1175648'. Below the title bar, there are navigation tabs: 'Home', 'Profile', 'Inquire', 'Special / Service', and 'Template'. A 'Change' button with the number '36' is visible. The main content area is divided into two sections. The top section, 'Requisition Lines', contains a table with columns: Quantity, Item, Description, UOM, and Cost. The table shows one line with a quantity of 1.00, item 'TEST', description 'Test', UOM 'EA', and cost '1,0000' (with a sub-total of 1.00000). The bottom section, 'Line Accounting', has tabs for 'Line Basic', 'Line Detail', 'Line Accounting' (selected), 'Line User Fields', and 'Line Comments'. Below the tabs, there is a 'Distribution Code' field with a dropdown menu showing 'QF' and 'OR'. The 'Line Accounting' table has columns: Account, Activity, Account Category, Distribution Company, Asset Template, Asset Code, Percent, Quantity, and Amount. The first row is checked and shows: Account '101111', Activity 'QF', Account Category '009100', Distribution Company '0000', Asset Template 'QF', Asset Code 'QF', Percent '100.000', Quantity, and Amount. Below the table, there are summary statistics: 'Total Quantity: 1.00', 'Total Cost: 1.00 USD', and 'Number of Lines: 1'. At the bottom right, there are four buttons: 'New', 'Clear', 'Print', and 'Release'.

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.

Approval Code: 4400F - REBECCA GOMEZ
This requisition must attain approval level: 1
This requisition was last approved by level: 1
Approval Level(s)
1 1 - RGOMEZ1 ✓

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

| Requisition | Requester | Company / Location | Creation Date | Requested Delivery Date | Value | Status | Req Line Info | Approval Info |
|-------------------------|-------------------------|---|---------------|-------------------------|---------|----------------|---------------|---------------|
| 1179958 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 12/15/2020 | | 250.00 | Unreleased | | |
| 1179957 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 12/15/2020 | | 1600.00 | Processed | | |
| 1179956 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 12/15/2020 | | 900.00 | Rejected | | |
| 1179955 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 12/15/2020 | | 400.00 | Needs Approval | | |
| 1179954 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 12/15/2020 | | 200.00 | Processed | | |
| 1175958 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 06/23/2020 | | 2500.00 | Rejected | | |
| 1174486 | tplonse | LOYOLA UNIVERSITY CHICAGO (9100) UNIVERSITY CONTROLLER'S OFFICE (4400A) | 02/28/2020 | | 2.00 | Rejected | | |

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

Back Previous Record Next Record

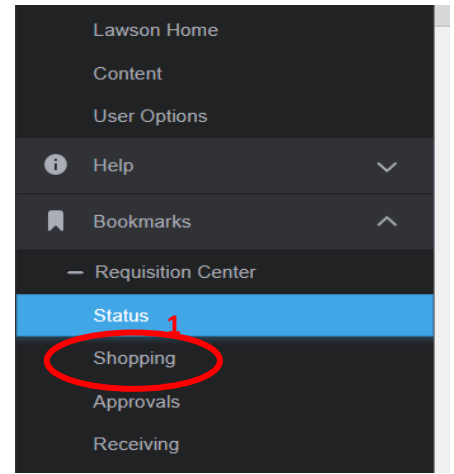
| | Item | Item Type | Requested Delivery Date | Quantity | UOM | Unit Cost | Vendor | PO | Status | |
|---|---------------------------|-----------|-------------------------|----------|-----|------------------------------|--|-------------------|-----------|---|
| 1 | REC 4 REC 4 More... | Special | 12/15/2020 | 40.00 | EA | 40.0000 (USD) 1,600.00 | 6026275 FUJIFILM VISUALSONICS CORP | 8838305 Line 1 | Processed | → |

Common requisition status codes are:

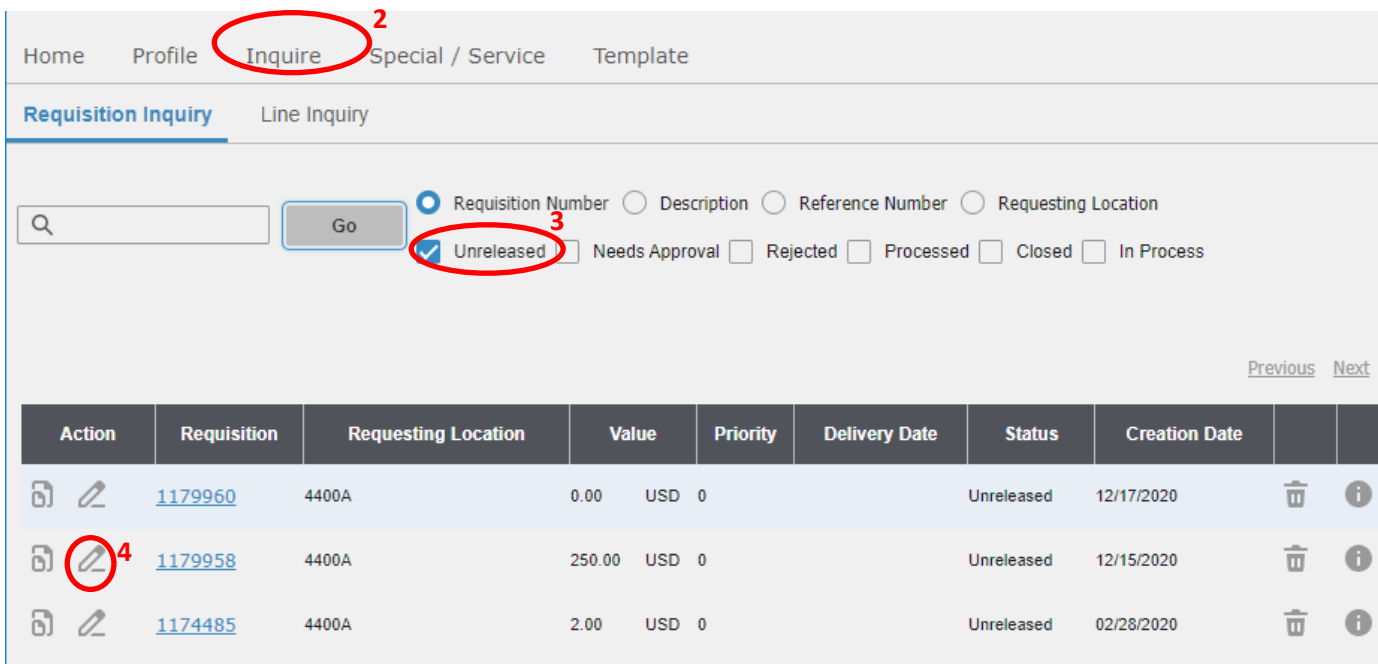
- **Unreleased** – the requisition needs to be released by the requester (see #31)
- **Released** – the requisition has been released but has not been approved
- **Rejected** – the requisition has been rejected by the approver
- **Processed** – the requisition has been approved
Note: a PO Number will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

Adding information to an unreleased requisition

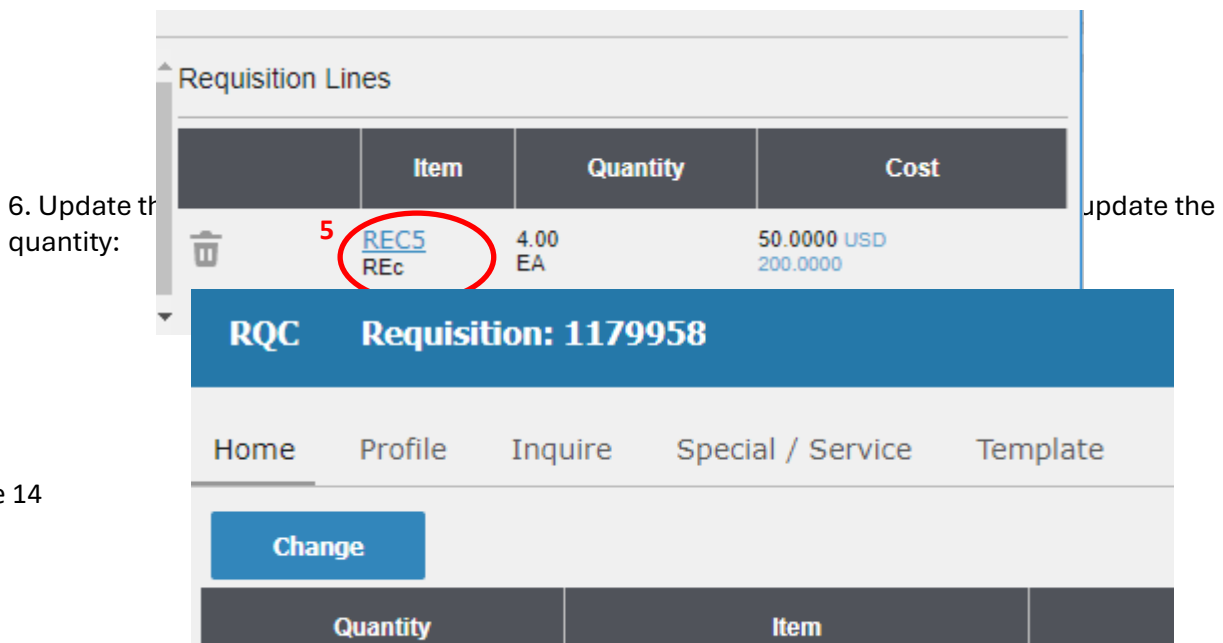
By default, the requisition center will load the last requisition that you created. If you clicked on **New** it will create a new requisition. To find existing unreleased requisitions, follow the steps below.



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.

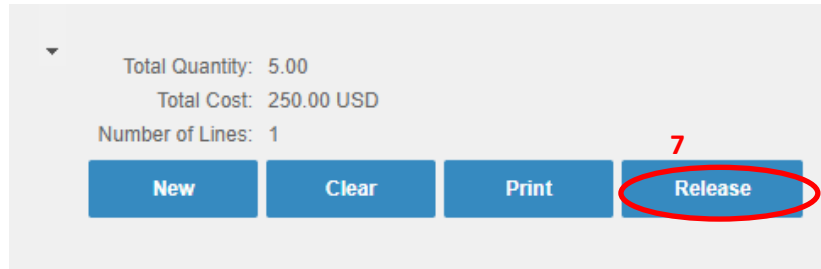


5. To update the information on the rec. Click on the item line link.





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



Resources

- [Purchasing Department Website](#)
- [Purchasing Policy](#)
- [Purchasing Manual](#)
- [Requisition Guidelines](#)

Contact

For questions or troubleshooting, please contact:

Purchasing Department
820 North Michigan Ave
Water Tower Campus
Lewis Tower-Room 700
(312)915-8780
Purchasing@luc.edu