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Chapter 1

Using This Guide

The purpose of this user guide is to provide reference material for your daily use of the product and for your needs in Lawson training.

This user guide contains procedures on basic and advanced features of the product. In addition, it provides information to help you understand how to use each procedure for your business processes.

User Guide Conventions

This user guide uses specific text conventions, visual elements, and terminology.

Text Conventions

Lawson user guides use the following standard text conventions.

<table>
<thead>
<tr>
<th>This</th>
<th>Represents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>bold</strong></td>
<td>A key name or a function key name. For example, Shift is a key name and Help (F1) is a function key name. A value or command that you must type exactly as it appears. A program name or a file name.</td>
</tr>
<tr>
<td><em>italics</em></td>
<td>A manual title or form name. An emphasized word or phrase. A placeholder for a user-defined value or variable. Follow the capitalization pattern of the placeholder. For example, “Type $LAWDIR/print/username/jobname/stepnumber/FORMID.prt” instructs you to type the user name, job name, step number, and form ID as follows: $LAWDIR/print/jane/emplist/1/GL100.prt</td>
</tr>
<tr>
<td>(F1)–(F24)</td>
<td>A function key number. “Press Help (F1)” instructs you to press the key mapped for the (F1) function.</td>
</tr>
<tr>
<td>Key1+Key2</td>
<td>A key combination. “Press Shift+FndNxt (F3)” instructs you to press and hold down the Shift key and then press the FndNxt (F3) function key. Release both keys to complete the action.</td>
</tr>
</tbody>
</table>
This Represents

Optional parameters. You can type none, one, or more of the parameters within the brackets. For example, the command

```
qsubmit [-Un] [-JobQueue -dDate -tTime] username jobname
```

means that you can type a specific job queue, date, or time, or you can omit these parameters.

Optional parameters. You can type only one of the parameters separated by a vertical line. For example, the command

```
phraserpt[-n|t] BaseLanguage [Translation]
```

means that you can type either the n or t parameter; you cannot type both.

A parameter that can be repeated. For example, the command

```
scrgen [-scxV] productline [systemcode [programcode...]]
```

means that you can type any number of program codes.

Visual Elements
Lawson user guides use the following visual elements.

STOP Information that you must know before you attempt the procedure or process.

Need More Details? Check out the following concepts:

- Introduces a list of topics that provide additional or background information. Each item in the list includes a cross-reference to the information.

*Application integration. Events, required actions, or other consequences that are related to other Lawson applications.

IMPORTANT Important information that you must consider when you perform the procedure.

CAUTION Cautionary information about actions that involve a risk of possible damage to equipment, data, or software.
**WARNING** Warning information about actions that involve a risk of personal injury or irreversible destruction to the data or operating system.

---

**TIP** Supplemental information about possible shortcuts to the procedure or your business process.

**NOTE** Supplemental information that might be of interest to you as you complete the procedure.

---

### Terminology

The following terms have precise meanings in Lawson documentation.

<table>
<thead>
<tr>
<th>Term</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>access</td>
<td>Open a Lawson application form or subform.</td>
</tr>
<tr>
<td>choose</td>
<td>Start a process.</td>
</tr>
<tr>
<td>&quot;Choose Add&quot;</td>
<td>Instructs you to click a button or a link on a form to add a record to the Lawson system.</td>
</tr>
<tr>
<td>click</td>
<td>Place the cursor over an object (such as a button, link, or tab) and press the left mouse button.</td>
</tr>
<tr>
<td><strong>NOTE</strong></td>
<td>This description applies to a standard PC mouse with standard settings. You must translate the meaning of &quot;click&quot; to what is appropriate for your equipment.</td>
</tr>
<tr>
<td>define</td>
<td>Use a Lawson form to create a new record for a company, a vendor, a class, a code, or another entity used throughout the Lawson system.</td>
</tr>
<tr>
<td></td>
<td>– or –</td>
</tr>
<tr>
<td></td>
<td>Specify configuration parameters, printers, security roles, data areas, and so on.</td>
</tr>
<tr>
<td>run</td>
<td>Send data for processing. For example, run a report or batch job.</td>
</tr>
<tr>
<td>select</td>
<td>Identify an item to process. Selecting an item does not start a process.</td>
</tr>
<tr>
<td>To select an item, place the cursor over an item and then click.</td>
<td></td>
</tr>
<tr>
<td>If you use character-based mode, highlight an item to select it. Sometimes, you must also press <strong>Mark</strong> or <strong>Next</strong> or choose <strong>OK</strong>.</td>
<td></td>
</tr>
<tr>
<td>type</td>
<td>Press keyboard keys to enter information in a field, then move the cursor to the next field.</td>
</tr>
<tr>
<td>At a command line, type the letters exactly as written in the procedure, then choose <strong>OK</strong>.</td>
<td></td>
</tr>
<tr>
<td>Term</td>
<td>Meaning</td>
</tr>
<tr>
<td>------</td>
<td>---------</td>
</tr>
</tbody>
</table>
| OK   | Choose OK to save or process the data that you entered on the current form.  
  - "Choose OK" instructs you to click a button or a link on a form. An "OK" button might be labeled "Update" or show a check mark. An "OK" link might be labeled "OK."  
  - "Choose OK" instructs you to press the keyboard key mapped as **Enter**. |

## Product Documentation

Lawson offers the following product documentation:  
- Online help  
- User guides and manuals  
- Release notes and installation instructions  
- Enhancement and patch documentation

To find Lawson documentation, see the user interface or [http://support.lawson.com](http://support.lawson.com). To obtain a login password and ID for the Support site, see your organization’s Lawson contact or your Lawson client manager.

## Global Support Center

Lawson Global Support Center (GSC) services are available to all Lawson customers who are on maintenance support for Lawson products. See the Global Support Manual for the following information:  
- What information to gather before you contact the GSC  
- How to contact the GSC  
- How the GSC processes your request  
- How to receive enhancements and patches  
- Which services are standard maintenance and which services are billable

To find the **Global Support Manual**, see [http://support.lawson.com](http://support.lawson.com). To obtain a login password and ID for the support web site, see your organization’s Lawson contact or your Lawson client manager.

## Documentation Contact

We welcome your questions or suggestions about Lawson documentation. Please send comments to **documentation@lawson.com**.
Chapter 2

Requisitions Self-Service Overview

The Requisitions Self-Service application lets you create requests with demand on stock and demand on vendors, and process, view and modify requisitions.

This chapter provides a high-level overview of the Requisitions Self-Service application and includes information about the application's major processes and integration with other Lawson and non-Lawson products.

Requisition Processing

The Requisitions Self-Service application can be divided into three main processes: setup, create, and view and modify requisitions. This section provides an overview of these processes.

Setting Up Requisitions

When you set up the Requisitions Self-Service application, you must consider the requesting needs for your central reporting structure. Specifically, you must determine the number of requesters, requesting locations, and the approval levels needed, if any. Additional web component setup is also required. For additional information about setting up requisitions, see the Requisitions User Guide.

Creating Requisitions

When you create a requisition, you request items from inventory or from vendors. The Requisitions Self-Service application provides different methods to customize the requesting process for your business needs.

Viewing and Modifying Requisitions

The Requisitions Self-Service application provides options to let you maintain and track the status of requisitions for your business needs.

How do I use Help?

Three types of help are available in the Requisitions Self-Service application.

<table>
<thead>
<tr>
<th>Help Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mouse Over</td>
<td>Mouse over lets you view information when your mouse pointer passes over specific items.</td>
</tr>
<tr>
<td>Help Type</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Contextual Help</td>
<td>The Contextual Help box lists key terms and their definitions. Access contextual help using the question mark link on the top bar.</td>
</tr>
<tr>
<td>Drill/Select</td>
<td>The Drill Around function lets you drill down on a field to get more specific information about that field or to select a specific value. The drill function is available for most shaded fields under the Profile option and for item detail in the Shopping Cart.</td>
</tr>
</tbody>
</table>
This chapter provides setup information for the Requisitions Self-Service application and describes how Requisitions Self-Service interacts with other Lawson applications.

- "Setting Up Internet Object Services (IOS)" on page 15
- "Setting Up the Inventory Control Application" on page 15
- "Setting Up the Purchase Order Application" on page 16
- "Setting Up the Requisitions Application" on page 16
- "Setting Up the Search Catalog" on page 18
- "Defining Categories (optional)" on page 19
- "Setting Up the Punchout Feature" on page 19

Before you can use the Requisitions Self-Service application, you must set up other Lawson applications.

**Setup: Prerequisite Applications**

The prerequisite applications affect the way processing occurs in the Requisitions Self-Service application. For example, Requisitions Self-Service uses accounts for posting transactions. Setup decisions that directly affect the Requisitions Self-Service application are noted within the appropriate procedure. For more information about setting up prerequisite applications, see "Setting Up Prerequisite Applications" on page 14.

**Setup: Requisitions Structure**

Before you can create requisitions, you must set up the Requisitions application, including requesters, requesting locations, and approval codes (if used). For more information about requisition structure setup, see the Requisitions User Guide.

**Setup: ProcessFlow**

If using Line Level Approvals, service and process definitions must be enabled in the LOGAN Productline. Actual flows need to be modified and uploaded to the server.
This chapter provides setup information for applications that regularly interface with and affect the Requisitions Self-Service application. You must perform this setup before you can use the Requisitions Self-Service application.

<table>
<thead>
<tr>
<th>Application or Feature</th>
<th>Setup Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Object Services (IOS)</td>
<td>Designate a valid requester to allow access to the Requisitions Self-Service application. See &quot;Setting Up Internet Object Services (IOS)&quot; on page 15</td>
</tr>
<tr>
<td>Inventory Control</td>
<td>Define the tasks allowed in the Requisitions Self-Service application. See &quot;Setting Up the Inventory Control Application&quot; on page 15</td>
</tr>
<tr>
<td>Purchase Order</td>
<td>Define the vendors and locations to use in the Requisitions Self-Service application. See &quot;Setting Up the Purchase Order Application&quot; on page 16</td>
</tr>
<tr>
<td>Requisitions</td>
<td>Define the tasks allowed in the Requisitions Self-Service application. See &quot;Setting Up the Requisitions Application&quot; on page 16</td>
</tr>
<tr>
<td>Search Catalog</td>
<td>Define the groups, origin fields, keywords, and keyword synonyms to be used to search in the Requisitions Self-Service application. See &quot;Setting Up the Search Catalog&quot; on page 18</td>
</tr>
<tr>
<td>Categories (optional)</td>
<td>Import, modify, and assign UNSPSC codes for use in the Requisitions Self-Service application. See &quot;Defining Categories (optional)&quot; on page 19</td>
</tr>
</tbody>
</table>
### Application or Feature Setup Information

<table>
<thead>
<tr>
<th>Application or Feature</th>
<th>Setup Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Punchout (e-Procurement feature) (optional)</td>
<td>Enable access to external vendor web sites through the Requisitions Self-Service application. See &quot;Setting Up the Punchout Feature&quot; on page 19</td>
</tr>
<tr>
<td>Procurement Templates (PO15) (optional)</td>
<td>Procurement Templates are used as Shopping Lists and are assigned to users on <strong>Participants (PO15.2)</strong>.</td>
</tr>
</tbody>
</table>

### Setting Up Internet Object Services (IOS)

Before you can use Requisitions Self-Service, you must designate a valid requester on each Web User Record.

**STEPS**  
To set up the IOS application

- Access the following form to define the information listed.

**NOTE**  
RD30 is in the LOGAN productline

<table>
<thead>
<tr>
<th>Form</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Profile and Web Name (RD30)</td>
<td>On the <strong>Personal Profile and Web Name (RD30)</strong>, designate a valid Requester. The Requester for each web user is defined using <strong>Requester (RQ04)</strong>.</td>
</tr>
</tbody>
</table>
| **NOTE**  
Multiple web users can all share the same requester ID.|

For more information about how to set up the IOS application, see the *Internet Object Services Administration Guide*.

### Setting Up the Inventory Control Application

Before you set up the Requisitions application, you must set up the Inventory Control application. This procedure outlines the additional information that you must define in the Inventory Control application for Requisitions Self-Service processing.

**STEPS**  
To set up the Inventory Control application

- Access the following forms to define the information listed.
Form | Setup
---|---
IC Company (IC01) | On the Requisitions Self-Service tab on IC Company (IC01), define the tasks/options allowed in the Requisitions Self-Service application and the type of items that can be viewed in Requisitions Self-Service, Requisition Approval Type.

For more information about how to set up the Inventory Control application, see the *Inventory Control User Guide*.

**Setting Up the Purchase Order Application**

Before you use the Requisitions Self-Service application, you must define Purchase Order vendors and locations. If you plan to use the Punchout feature, additional setup is required. Use this procedure to define information in the Purchase Order application.

**STEPS** To set up the Purchase Order application

- Access the following form to define the information listed.

<table>
<thead>
<tr>
<th>Form</th>
<th>Setup</th>
</tr>
</thead>
</table>
  PO Vendors and Location (PO10.1, PO10.2) | If your company issues purchase orders through Electronic Data Interchange (EDI), select EDI as your PO Vendor Issue Method.  
  **NOTE** Electronic Data Interchange (EDI) is a method of transmitting data electronically. For more information, see the *EDI Standard User Guide* or the *EDI Professional User Guide*.  
  On the Punchout tab on PO Vendors (PO10.1) and PO Location (PO10.2), specify whether to allow changes to punchout items.  
  For more information about how to set up the Purchase Order application, see the *Purchase Order User Guide*.

**Setting Up the Requisitions Application**

If you use the Inventory Control application to issue items, you must define at least one requesting location in the Requisitions application.
**STEPS**

To set up the Requisitions application for Requisitions Self-Service

- Access the following forms to define the information listed.

<table>
<thead>
<tr>
<th>Form</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requesting Locations (RQ01)</td>
<td>A requesting location can create Issue, Direct Transfer or Intransit Transfer transaction types from the Inventory Location.</td>
</tr>
<tr>
<td>Requester (RQ04)</td>
<td>A requester initiates demand for materials, supplies, and so on.</td>
</tr>
<tr>
<td></td>
<td>On the Requisitions Self-Service tab on Requester (RQ04), define the tasks. This Requester is allowed in the Requisitions Self-Service application. Tasks include setting the cost override flag, the type of approval required, and whether the user uses Lawson item #, UPC, UPN 1, UPN 2, or SKU. To determine whether the Drop Ship tab appears in the Profile section, select Y or N. N is the default.</td>
</tr>
<tr>
<td>Approval Codes (RQ02)</td>
<td>Approval codes are defined for a requester using Approval Code (RQ02). There are four levels of requisition approval:</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> Req Header is the requisition total amount.</td>
</tr>
<tr>
<td></td>
<td>• Req Header using Approval Code</td>
</tr>
<tr>
<td></td>
<td>• Req Header using ProcessFlow</td>
</tr>
<tr>
<td></td>
<td>• Line Approvals using ProcessFlow</td>
</tr>
<tr>
<td></td>
<td>• No Approval Required</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> The use of Approval Codes requires the requisition to be approved using Approval Review (RQ12).</td>
</tr>
<tr>
<td></td>
<td><strong>NOTE</strong> Dollar amounts defined on Approval Codes (RQ02) are not used in ProcessFlow. Dollar amounts are defined in ProcessFlow.</td>
</tr>
</tbody>
</table>

*For more information about how to set up the Requisitions application, see the Requisitions User Guide.*
Setting Up the Search Catalog

The search catalog lets you use keywords to search. In the search catalog, a keyword is an index entry that identifies inventory and nonstock items. Origin fields are the database fields from which the keyword field is created. You define the origins for which you want keywords created and, using IC800, the system creates keywords based on the database fields. After origins are defined as used, the system automatically creates keywords.

The Inventory Control application dictates which origin fields and which synonyms are used for searches. For example, Lawson item number, UPC number, or description. Each set of characters separated by a space will create a keyword entry.

Synonyms are words that are similar to the item for which you want to search. For example, for the keyword *coat*, you might want to define the synonyms *jacket, parka, slicker*, and *windbreaker*.

**STEPS**

**To set up the Search Catalog**

- Access the following forms to define the information listed.

<table>
<thead>
<tr>
<th>Form</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Corporate Item Group (IC00.1)</td>
<td>Define an item group that defines general parameters for items in that group. Click the Search button to access IC00.5 to define the data fields to use to create keywords. The data fields are then called &quot;origin.&quot;</td>
</tr>
<tr>
<td>Keyword Search Setup (IC00.5)</td>
<td>Select the origin fields that your company uses to search.</td>
</tr>
<tr>
<td>Keyword Search Load (IC800)</td>
<td>Create keywords for existing data or create keywords for the new origin for existing data. For example, if you select a new origin, you must run <em>Keyword Search Load (IC800)</em> to create additional new keywords.</td>
</tr>
<tr>
<td>Keyword Synonym (IC32.1)</td>
<td>Define the synonyms associated with your keywords. Type as many synonyms as you need for the keyword.</td>
</tr>
</tbody>
</table>

For more information about how to set up the search catalog, see the *Inventory Control User Guide*. 
Defining Categories (optional)

The Categories feature is designed to use UNSPSC (United Nations Standard Products and Service Codes).

Categories let you search for items by category. After you import UNSPSC codes, you can assign them on Item Master (IC11).

The codes have four levels: segment, family, class, and commodity. These levels create an item hierarchy and let the user search each level for items in the ITEMMASTER file. These codes are attached to items on Item Master (IC11).

After you define categories, you can click on a category top level in Requisitions Self-Service to open the segment tree to the product, family, class, commodity, branches, and finally items. You can select items at any of the levels.

**STEPS**

To define categories

- Access the following forms to define the information listed.

<table>
<thead>
<tr>
<th>Form</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Load UNSPSC Product Codes (IC516) (optional)</td>
<td>Load UNSPSC codes to use in the Requisitions Self-Service application. UNSPSC codes let you search by category. The UNSPSC code must be attached to an item in the ITEMMASTER (IC11) file to be active. <strong>NOTE</strong> Standard UNSPSC codes are available for download from <a href="http://www.unspsc.org">www.unspsc.org</a>.</td>
</tr>
<tr>
<td>UNSPSC (IC16)</td>
<td>A standardized way to categorize items. <strong>NOTE</strong> Requisitions Self-Service is designed for use with UNSPSC codes, but you can also define your own four-tier structure.</td>
</tr>
<tr>
<td>Item Master (IC11)</td>
<td>You can assign UNSPSC codes to each item in a class.</td>
</tr>
</tbody>
</table>

For more information about how to set up categories, see the Inventory Control User Guide.

Setting Up the Punchout Feature

When enabled, the Punchout feature lets requesters access external vendors’ web pages, shop for items, and return selections to a Lawson requisition.
For more information about how to set up the Punchout feature, see the *e-Procurement Administration Guide*.

**NOTE** e-Procurement is a separate, additional Lawson application.

If you are using the Punchout feature, you must have webMethods 4.6 installed on the Windows 2000 Server.
Chapter 4

Creating a Requisition

This chapter describes how to create a requisition. You can create a requisition by using one or more of the following Find/Shop menu options:

- Search Catalog
- Special/Service
- Shopping List
- Punchout
- Express Order
- Categories
Concepts in this Chapter

**TIP** To skip directly to the procedures, see "Procedures in this Chapter" on page 25.

The following concepts provide background and conceptual information for the procedures within this chapter.

- "What Is the Shopping Cart?" on page 22
- "What Is the Search Catalog?" on page 22
- "What Is a Special/Service?" on page 22
- "What Is a Shopping List?" on page 23
- "What Is the Express Order Option?" on page 23
- "What Is the Categories Option?" on page 23
- "What Is the Inquire Option?" on page 23
- "What Is the Profile Option?" on page 23
- "What Is the Punchout Feature?" on page 24

**What Is the Shopping Cart?**

The shopping cart displays the total number of items and the total transaction amount for a requisition in base currency. The shopping cart dynamically builds quantity and amount for items in the cart. The shopping cart lets you modify requisition lines and print requisitions. Buttons at the bottom are viewable once items have been added to the cart. If you Inquire on a Processed Requisition, Closed Requisition, Rejected Requisition, or Needs Approval, only the Print and New Req buttons display.

**NOTE** Use the mouse over feature to view the translated currency.

**What Is the Search Catalog?**

The Search Catalog lets you search for items in the Item Master file. You can search for items and keywords in up to 30 origin fields that were defined during setup.

**What Is a Special/Service?**

A special item is not defined on Item Master (IC11.1) and is not tracked in inventory.

A service item is used for services, such as equipment repair or monthly copier maintenance. There are two types of service items; Amount and Quantity.
What Is a Shopping List?

A Shopping List is a predefined procurement template. This template is defined in the Purchase Order application on Procurement Template (PO15). Before you use the shopping list option, you must set up procurement templates in the Purchase Order application. Which shopping lists are viewable is determined by template participants.

What Is the Express Order Option?

The Express Order option lets you add a specific item to the shopping cart. Use this function when you know the exact item that you want to add to the cart.

What Is the Categories Option?

The Categories option lets you search for items by category. Imported UNSPSC codes or user defined UNSPSC codes are assigned on Item Master (IC11).

After you define categories, you can click on a category top level for Requisitions Self-Service to open the segment tree to the product, family, commodity branches, and finally items. You can select items at any of the levels.

What Is the Inquire Option?

The Inquire option lets you search for requisitions. Options are available to search order by requisition status, requisition number, requisition description, reference number, or requesting location.

Line Inquire allows you to search for a Lawson item, creation date, or requesting location.

What Is the Profile Option?

The Profile option is your requisition header information. The Profile option includes requesting location, From company, From location, and accounting information. The values default based on the requester that is entered on Web User record (RD30) and Requester Record (RQ04).

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic</td>
<td>The Basic tab displays Requested Delivery Date, Deliver to location, and data specific to this requisition.</td>
</tr>
<tr>
<td>Tab</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Detail Profile</td>
<td>The Detail Profile tab provides additional default data definitions and some information from Requesting Location (RQ01).</td>
</tr>
<tr>
<td>Drop Ship (optional)</td>
<td>The Drop Ship tab provides address information from Requesting Location (RQ01) and additional default data. You can enable or disable Drop Ship on Requesters (RQ04).</td>
</tr>
<tr>
<td>Accounting</td>
<td>The Accounting tab provides information from Requesting Location (RQ01). You can also select data.</td>
</tr>
<tr>
<td>User Fields</td>
<td>The User Fields tab provides input details for Requisition and Purchase Order fields.</td>
</tr>
<tr>
<td>Comments</td>
<td>After you define a requisition header, you can add comments. Comments appear on internal documents, requisitions, purchase orders at header or trailer, on warehouse pick lists, receiving documents or as display only.</td>
</tr>
<tr>
<td>User Analysis (optional)</td>
<td>The User Analysis tab is viewable if Strategic Ledger has been enabled.</td>
</tr>
</tbody>
</table>

**What Is the Punchout Feature?**

The Punchout feature lets requesters access external vendors’ websites, shop for items, and return selections to a Lawson requisition. The Punchout feature is a vendor-managed catalog where items and prices are determined by your trading partner relationship. The shopping experience for each Punchout vendor is unique.
Procedures in this Chapter

Use the following procedures to create or edit a requisition.

- "Using the Search Catalog Option" on page 25
- "Using the Shopping List Option" on page 27
- "Using the Express Order Option" on page 29
- "Using the Special/Service Option" on page 30
- "Using the Inquire Option" on page 31
- "Using the Punchout Feature" on page 33
- "Editing the Shopping Cart" on page 34

Using the Search Catalog Option

This procedure outlines the process for using the Search Catalog option. A search can be as specific as a Lawson item number or as generic as a measurement in a description field. You can also limit your search by selecting specific origins. Before you use the Search Catalog option, you must generate search keywords and origins.

Need More Details? Check out the following concepts:
- "What Is the Search Catalog?" on page 22

STEPS To use the Search Catalog option

1. On the Find/Shop option menu, click Search Catalog.
2. Select the type of search you want to perform.

<table>
<thead>
<tr>
<th>Simple Search</th>
<th>A simple search searches all the origin fields, but only Lawson items are displayed.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advanced Search</td>
<td>An advanced search allows you to determine which fields to look at when executing the search. These keywords are generated when you run Keyword Search Load (IC800) or are created when you add a new item.</td>
</tr>
</tbody>
</table>
Expanded Items

Expanded items are any additional item codes kept for an item.

3. If you are performing an advanced search, select if you want an Expanded Item List to display with your search results. Expanded list allows Vendor Item, UPC, UPN1, UPN2, SKU, and NDC (National Drug Code) information to be displayed for each Lawson item.

4. Define search criteria. Consider the following fields.

   **Search**
   The Search field lets you search for a specific item. Whole words are required. A specific search disregards the following symbols: -, %, +, ^, !, &, @, *, #, ?, and $. For example, if you search for “glove #1 size”, your search returns all entries that contain the word “glove” and “size” but does not return an exact match.

   **Ignore**
   The Ignore field lets you designate a group of characters to exclude from your search. For example, if you search for “gloves” and exclude “latex”, the search returns all gloves that do not include the word latex.

   **Word Finder**
   The Word Finder field lets you search for partial words, complete words, or words within a phrase or sentence. Word Finder can only be accessed when using an Advanced Search.

5. Select the origin in which to search. The default is Select All in the word finder field.

6. Type the search query.
To search for a full keyword, in the Search field, type a word. 
—or— 
To search for a partial word, in the Word Finder field, type a partial word.

7. Select whether you want to include the Expanded Item information in your search results. Expanded Item list includes any alternate item numbers (i.e. SKU or vendor items).

8. In the Search Records to Return field, select the number of records to return (5, 10, 15, 20, or 25). Expanded item records are not included in these counts.

9. Click Search to begin your search. Your search results appear.

Using the Shopping List Option

The Shopping List option lets you access predefined procurement templates and add a defined group of items to your shopping cart.

Need More Details? Check out the following concepts:
• "What Is a Shopping List?" on page 23

STOP Before you use the Shopping List option, you must set up Procurement templates and identify participants in the Lawson Purchase Order application.
**STEPS**

To use the Shopping List option

1. On the Find/Shop option menu, click Shopping List.

![Shopping List](image)

*Figure 1. Shopping List*

2. Use the Search field to search for a specific template ID or use the Shopping List buttons to access a list of templates.

<table>
<thead>
<tr>
<th>Field or Option</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search</td>
<td>The Search field lets you search for a template by ID.</td>
</tr>
<tr>
<td>Company Shopping List</td>
<td>Click the Company Shopping List button to display a list of predefined, company-specific requisition templates.</td>
</tr>
<tr>
<td>Location Shopping List</td>
<td>Click the Location Shopping List button to display a list of predefined, location-specific requisition templates.</td>
</tr>
<tr>
<td>Requester Shopping List</td>
<td>Click the Requester Shopping List button to display a list of predefined, requester-specific requisition templates.</td>
</tr>
</tbody>
</table>

3. Select a template.
   * If you know the template ID, type it in the Search field.
   * If you do not know the template ID, click the Company, Location, or Requester Shopping List button to access a list of predefined requisition templates.

4. Click on the template name to see the items.
5. Add selected items to your shopping cart.

**Using the Express Order Option**

The Express Order option lets you add a specific item to the shopping cart. Use this function when you know the exact item that you want to add to the cart.

Express order items are either inventoried or nonstock. An inventoried item is an item that the Inventory Control application maintains quantities and cost for. A nonstock item type is defined in the Item Master file but not tracked in inventory. To default cost from a Purchase Order (PO), agreement, or invoice and vendor information for a nonstock item, set the Inventory Tracking flag to No on the Main tab on Item Location (IC12.1).

Need More Details? Check out the following concepts:

- "What Is the Express Order Option?" on page 23

**STEPS To use the Express Order option**

1. On the Find/Shop option menu, click Express Order.

![Figure 2. Express Order](image)

2. Add an item to your shopping cart. Consider the following fields.

<table>
<thead>
<tr>
<th>Item</th>
<th>The item that you want to order.</th>
</tr>
</thead>
</table>
Quantity The quantity of the item you want to order. Type the quantity that you want. The default is 1.

**NOTE** The Quantity field has a maximum quantity of 999,999,999.

UOM The unit of measure for the product that you want to purchase. For example, bag, box, 12 pack, and so on. The stock UOM defaults to this field. This is a display only field.

3. Click the Add button to add the item to the shopping cart.

**Using the Special/Service Option**

This procedure describes how to use the Special/Service option.

**Need More Details?** Check out the following concepts:

- "What Is a Special/Service?" on page 22

**STEPS** To use the Special/Service option

1. On the Find/Shop option menu, click Special/Service.

**Figure 3. Special/Service**

2. Add an item to your shopping cart. Consider the following fields.

| Item      | The item that you want to order. |
Item Type
There are three item types; Amount Service, Quantity Service, and Special.
• Amount Service is a service with a flat fee. For Amount Service, the quantity is always set to 1 (no Item Master record).
• Quantity Service is a service with a per unit cost (no Item Master record).
• Special is an item that is not tracked in inventory (no Item Master record).

Quantity
The quantity of the item that you want to order. The default is 1. Type the quantity that you want.
NOTE The Quantity field has a maximum quantity of 999,999,999.

UOM
The unit of measure for the product that you want to purchase. For example, bag, box, 12 pack, and so on. Select the unit of measure from the menu.

Cost
Enter the cost of the item that you want to purchase.

Taxable
Whether or not the selected item is taxable.

Tax Code
The code from the Tax subsystem.

Item Description
The Item Description box lets you enter up to 32K of free-format text. Item description text is referenced as an attachment and forwarded as a PO comment or a description of the item.

Late Delivery Date
The latest date that the item can arrive and still be acceptable. You do not have to enter a late delivery date.

3. Click the Add button to add the item to the shopping cart.

Using the Inquire Option

The Inquire option lets you search for requisitions. You can search orders by requisition status, requisition number, requisition description, reference number, or requesting location. You can also perform a line item search by item, date created, and location.

Need More Details? Check out the following concepts:
• "What Is the Inquire Option?" on page 23
**STEPS**

To use the Order Inquiry option

1. Click Inquire.

![Inquire option](image)

**Figure 4. Inquire option**

2. From the Inquire screen, select the Order Inquiry tab from the drop down list.

3. Select a search criteria. The criteria are Order, Description, Reference Number, or Requesting Location.

4. In the Search field, enter the search text.
   - To search for a word, type the word.
   - or –
   - To search all, leave the Search field blank.

   **TIP**
   To refine your search, you can use a combination of search criteria, status, and information entered in the Search field.

   **TIP**
   Click on the requisition number to access the Lawson Drill-Around feature.

5. Optional. Select a status for which to search.

6. Click the Search button to begin your search. Your search results appear.

7. Copy, Modify, View, or Delete a selected requisition.
   - Copy performs a physical copy of an existing requisition, all the lines (with or without accounting distributions), comments, and user fields. You also have the ability to define the header and line information that should be copied.
   - View allows you to see and reprint the requisition.

**IMPORTANT**
Searching by Requisition or Requesting Location require an exact match. Searching by Reference Number and Description return items that contain the search query.
NOTE Punchout items will not be copied.

**STEPS To use the Line Inquiry option**

1. Click Inquire.
2. From the Inquire screen, select the Line Inquiry tab from the drop down list.
3. Select a search criteria. The criteria are Item, Creation Date, or Location.
4. In the Search field, enter the search text.
   - To search for a word, type the word.
   - or –
   - To search all, leave the Search field blank.
5. Click the Search button to begin your search. Your search results appear.
   The earliest requisition with the item will be displayed in the first group in reverse date order. You may need to click Next several times to get to the current requisition.
6. Copy, Modify, View, or Delete a selected requisition.
   Copy performs a physical copy of the complete requisition. You also have the ability to define the header and line information that should be copied. When you copy a requisition, the requisition is sent through the cost defaulting process to update items to current prices.

**NOTE** Punchout items will not be copied.

View allows you to see and reprint the requisition.

---

**Using the Punchout Feature**

When enabled, the Punchout feature allows requesters to access external vendors, shop for items, and return selections to a Lawson requisition.

Punchout features are based on agreements between your company and the Punchout vendor. Therefore, you may not be able to make certain modifications to punchout requisitions depending on these agreements.

**NOTE** The Punchout feature requires the purchase of the Lawson e-Procurement product.

For more information about setting up the Punchout feature, see the e-Procurement Administration Guide.

**Need More Details?** Check out the following concepts:

- “What Is the Punchout Feature?” on page 24

**STEPS To use the Punchout option**

1. On the Find/Shop option menu, click Punchout.
2. Click a vendor icon to transfer to that vendor’s website.
3. Search for or select an item(s).
4. Add the item to the vendor site shopping cart.
5. Perform the checkout process at the vendor site. When you complete the checkout process, the item is added to the Lawson shopping cart.
6. Check out or save the requisition. Click the Requisitions Self-Service Checkout button to release a requisition or the Save Order button to save the requisition.

**Editing the Shopping Cart**

Prior to checking out, you can edit line items you have added to the shopping cart.

Click the item number in the shopping cart. The item information appears. Use the tabs to view and modify information for the selected line item.

Additional tabs are accessed by clicking the drop down arrow on each tab.

*Figure 5. Line Item tabs*

**NOTE** Clicking the Change button on any tab affects all the tabs and returns you to the Line Basic tab.

**Line Basic tab**

The Line Basic tab displays general line item information such as Item Type, Manufacturer Code, Cost Option, etc.

*Figure 6. Line Basic tab*

Consider the following fields.
Field Notes

<table>
<thead>
<tr>
<th>Field</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Source</td>
<td>Cost Source is where the line item got its price.</td>
</tr>
<tr>
<td>Cost Option</td>
<td>Vendor Determined, No Charge, or Cost Required.</td>
</tr>
</tbody>
</table>

**Line Detail tab**

The Line Detail tab displays information about the selected line item.

*Figure 7. Line Detail tab*

Consider the following fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Currency Code</td>
<td>Currency Code can only be changed if the vendor has not been set up with currency code. Any selected currency code must already be set up to convert. Currency code is only available if Vendor has been assigned.</td>
</tr>
<tr>
<td>Create PO</td>
<td>The Create PO field can only be changed if the flag is set to No.</td>
</tr>
</tbody>
</table>

**Line Accounting tab**

The Line Accounting tab allows you to define where line item costs are distributed. If you select a Distribution Code, click the Change button to populate the table.

**NOTE** Clicking the drop down arrow allows you to search.
TIP  Use the horizontal scroll bar to access the percent/quantity field for multiple distribution.

Figure 8. Line Accounting tab

Figure 9. Line User Fields tab

Line User Fields tab

The Line User Fields tab allows you to enter purchase order user dates and user fields. The information entered is then passed to the POLINE when the requisition is created into a purchase order.
Line User Analysis tab

The Line User Analysis tab is only available if you have Lawson Strategic Ledger installed and enabled.

Figure 10. Line User Analysis tab

Line Comments tab

The Line Comments tab allows you to enter comments on various forms. You can enter one of each type of comment with up to 32K of data each.

Figure 11. Line Comments tab
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