



9.0 Lawson Portal Navigation



Introduction to Lawson

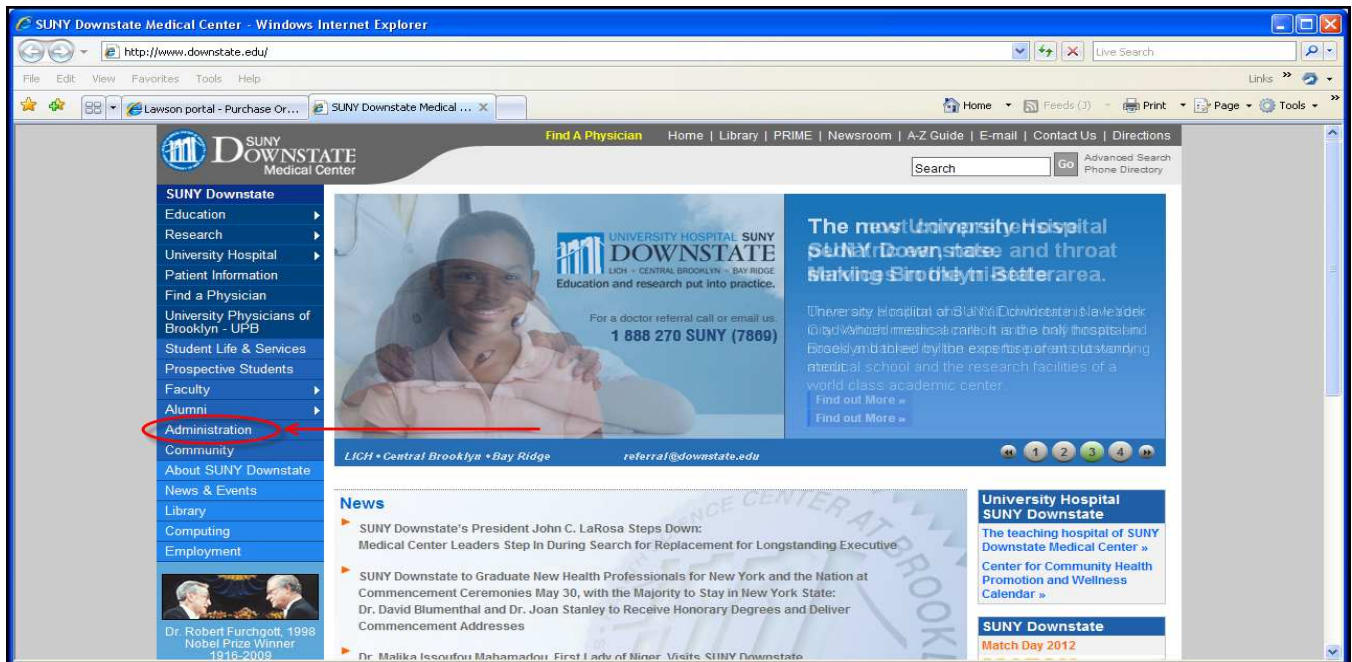
A goal for the ERP Finance component is standardizing, consolidating and integrating a number of financial reporting and accounting processes used throughout the organization. Lawson, an Enterprise Resource Planning (ERP) application, has been identified as the primary financial reporting system to help meet this goal. Through standardization, consolidation and integration, financial information across the organization will be more comparable, reliable and efficient. Lawson delivers enterprise applications in 20 languages to more than 4,000 customers in more than 40 countries.



Accessing the Lawson Portal

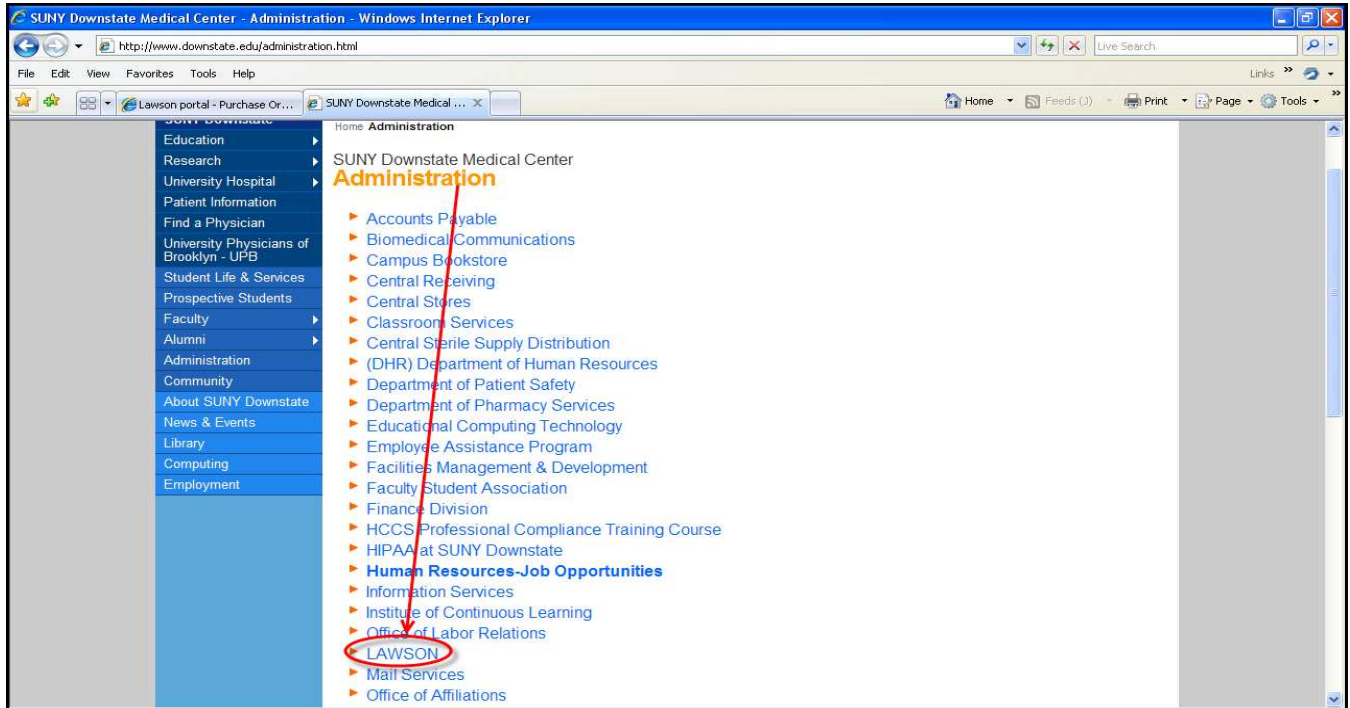
1. In your browser for Internet Explorer, enter the following URL:

<http://www.downstate.edu>



1. Click the Administration Link

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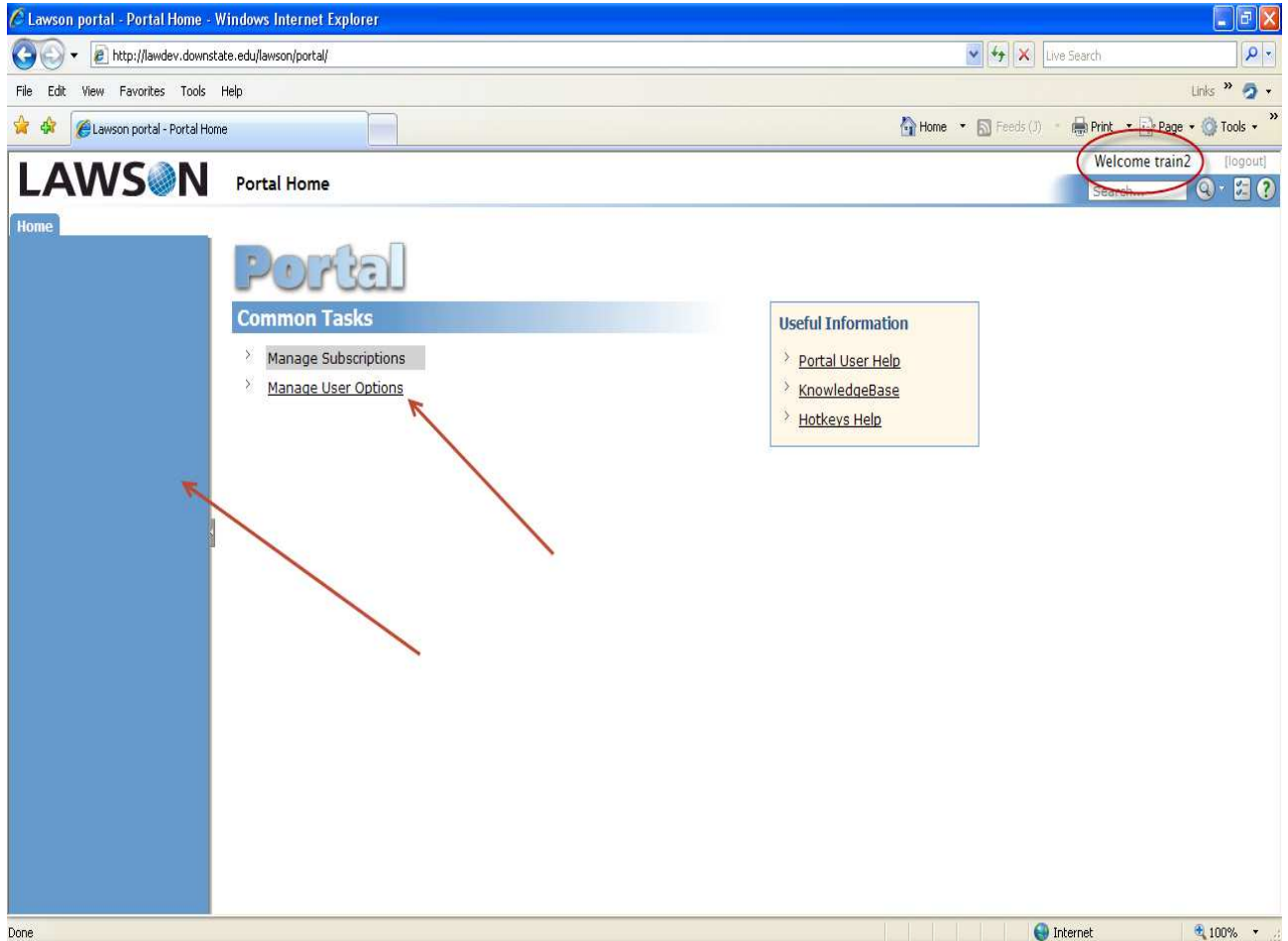
2. Next, click the Lawson link. This link will take you to the Portal login screen:

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3. Enter your **User ID** and **Password** in the login screen and click the **Login** button to go to your Lawson Home Page.

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4. This is the Home Page for the Lawson application. In the upper right corner you will see a welcome message with your **User Id**. If no options have been setup for you, the left pane is blank, while the right frame displays links for you select the navigation and content to personalize your homepage.

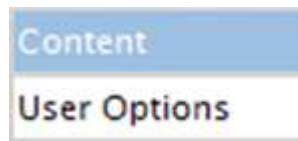
5. **Manage User Options on the homepage DO NOT CHANGE ANYTHING IN THIS SECTION:**

- > Manage Subscriptions
- > **Manage User Options**

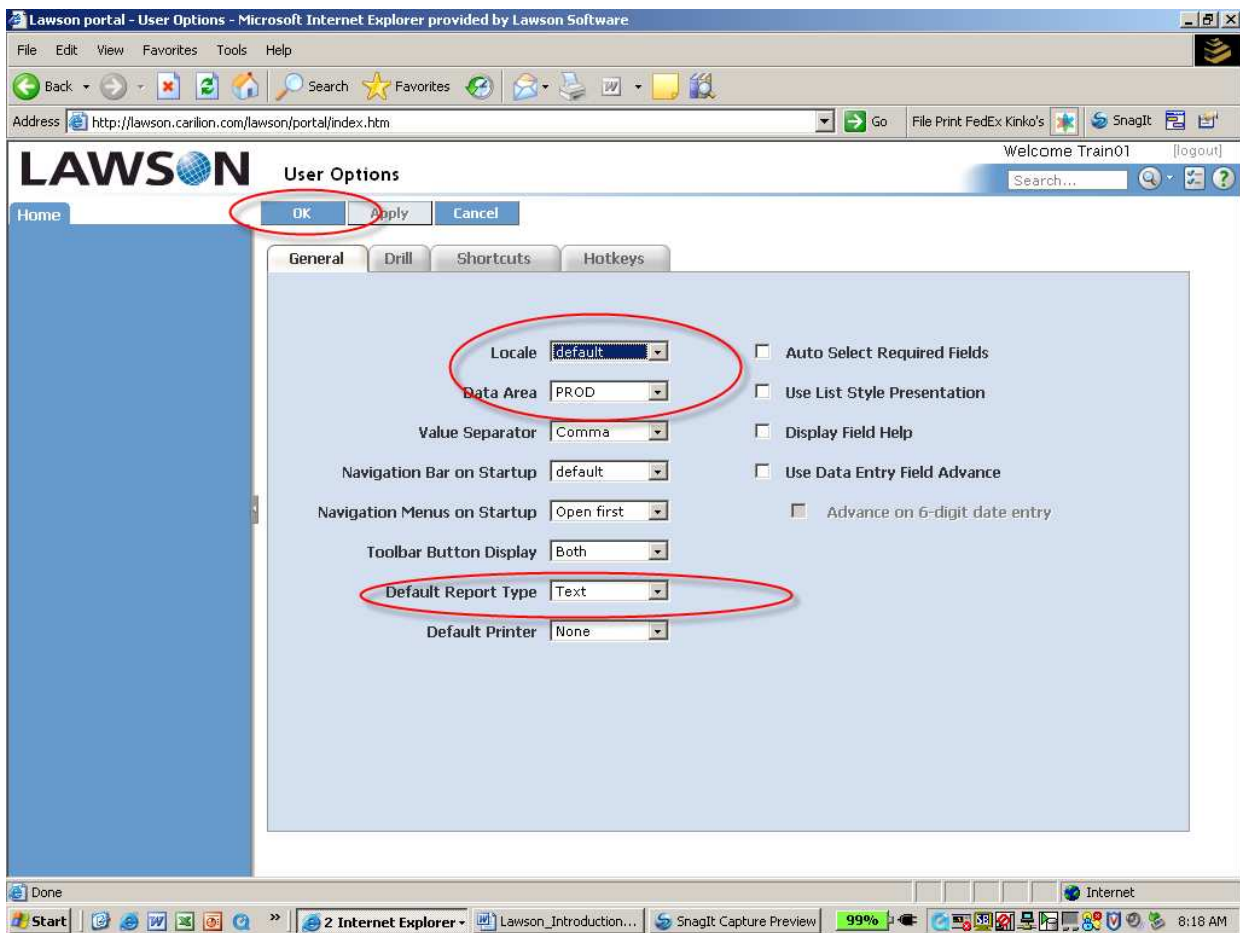
OR



Click on the  icon located in the upper right corner of the form. The following selections will appear:



6. User Options DO NOT CHANGE ANYTHING IN THIS SECTION




Settings Overview:

- **Locale:** generally used to change the language used on forms
- **Data area:** for conversion purposes, you will be in the DEV product line. In the future, you will use the PROD product line. Other product line(s) may be available for testing, depending on your security class.



- **Default Printer:** Lawson printer assigned by user setup
- **Default Report type:** the three report format options are XML, PDF and Text; choose the one you want to use as the default for your reports. Can override when viewing reports. Drill Around® capabilities are viewed in XML and Text format, not PDF.
- **Use List Style Presentation:** If this option is selected, when any form is accessed, the records accessible by the form are displayed first with a link to the blank form.

- **Display Field Help:** if checked, field help is displayed automatically. You can use Help > Field Help to eliminate field help by clicking on the  icon in the upper right corner of the form and selecting Field Help from the following list of options:

support.lawson.com
About
Hotkeys
Portal User Help
Form Help
Field Help
Form Wizard

Navigation and Content

Navigation Items versus Content Items

In the Lawson Portal, navigation and content are important concepts to understand. In simplest terms:

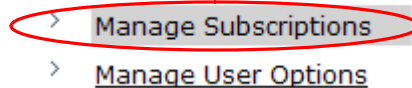
- **Navigation** is a place you want to go to. Navigation options appear in menus or lists in the **left** pane.
- **Content** is information you need. Content appears in the **right** pane.

In slightly more complex terms, navigation items are top-level bookmarks that, when you click on them, provide a list of links to content items. You can think of navigation and content as having a parent-child relationship. Navigation is the parent; content is the child. Content pages have no subordinate pages associated with them. No navigation is needed to access a content page. When you click on content that has been added to the content pane, you access the content itself, not a link to the content. You can immediately start working with content that appears in the content pane.




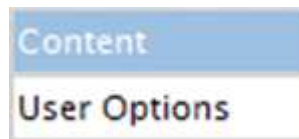
Selecting Navigation and Content Options

1. Use the **Manage Subscriptions** link to create a personal and custom portal layout.



OR

Click on the  icon located in the upper right corner of the form. The following selections will appear:




Select **Content**.

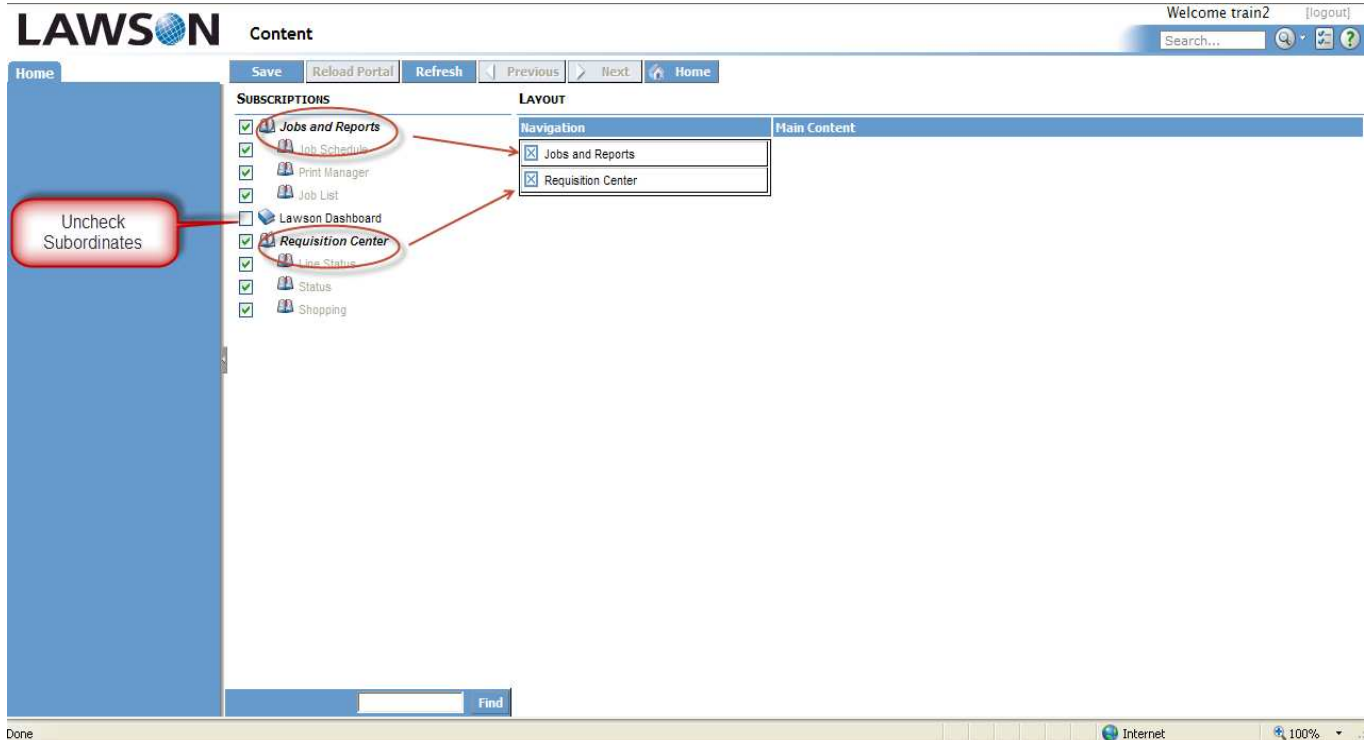
2. Add some **Navigation** and/or **Content** bookmarks. **Double-click** or **Drag** the options required for your job functions.
3. Use **Next** and **Previous** buttons to page through the list of bookmarks.



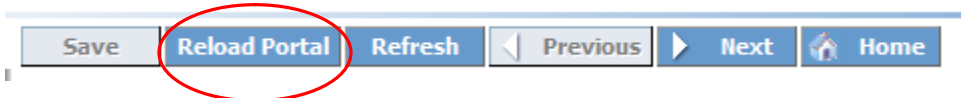
4. Your bookmarks now appear in the Navigation and Content columns. You can **Drag** the options up and down the list to change the order.

Navigation or Content options that have been selected are shown as bold in the subscription list. You can **Double-click** options added to the Navigation or Main Content columns or **Click** on the  to remove them from your layout.

The check mark next to a bookmark means you are subscribed to that bookmark. If you want to display a top-level bookmark on your portal, but you don't need all of the subordinates, you can **Uncheck** the subordinate and it won't display on your portal.



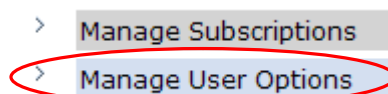
5. When you have completed making your selections, click **Save** at the top of the page. Then click **Reload Portal**. Your selections are now included in the left and right panes.




NOTE: Not all bookmarks are available for all co-workers because they are based on security profiles. Do not be surprised if you cannot change your home page in the future.

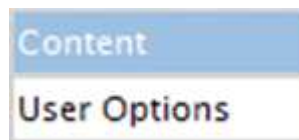
My Shortcuts

1. Each user may have a “My Shortcuts” bookmark in the navigation pane. Shortcuts let you set up custom links to websites, files on your PC, or Lawson application forms – you can create up to 20 shortcuts. Click on **Manage User Options**:



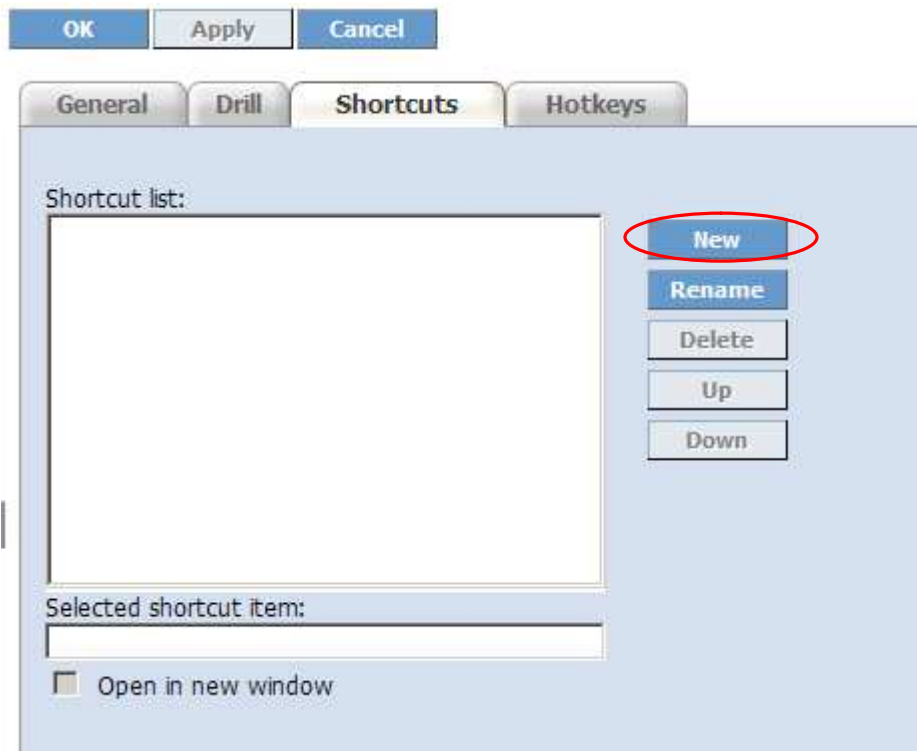
OR

Click on the  icon located in the upper right corner of the form. The following selections will appear:



Select **User Options**.

A form similar to this appears. Click on **New**:



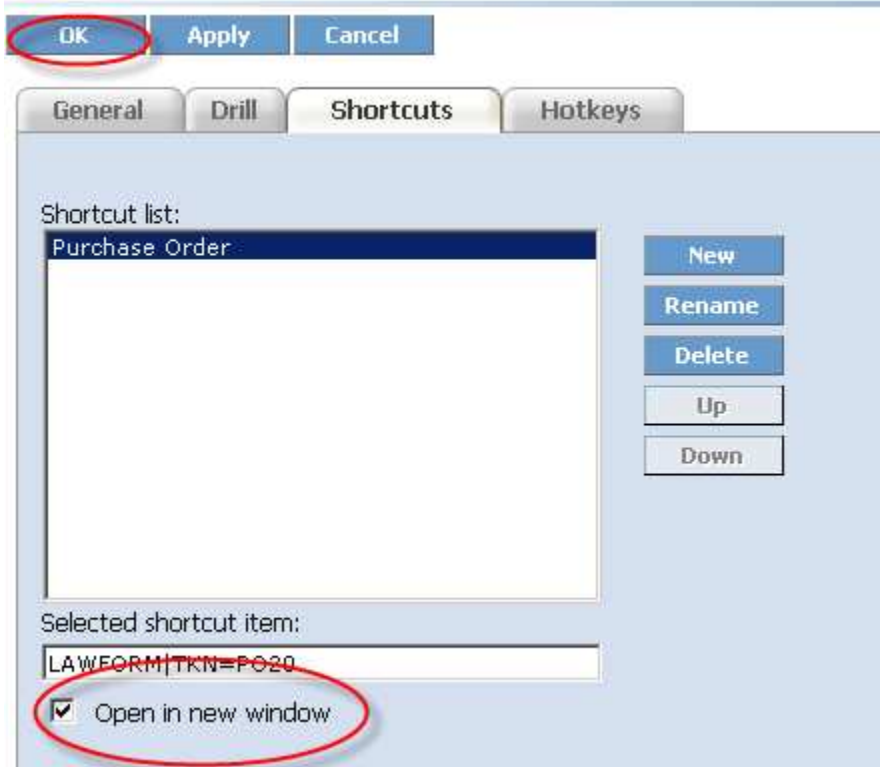
2. Enter the name of the shortcut and click **OK**:



Enter the URL or other access syntax in the box that appears next, and click **OK**:



Check **Open in new window** if you want the shortcut to launch after initial setup. Click **OK**.



3. If application options and shortcuts have been set up, the navigation frame displays a menu consisting of top-level (or parent) bookmarks with their subordinate (or child).

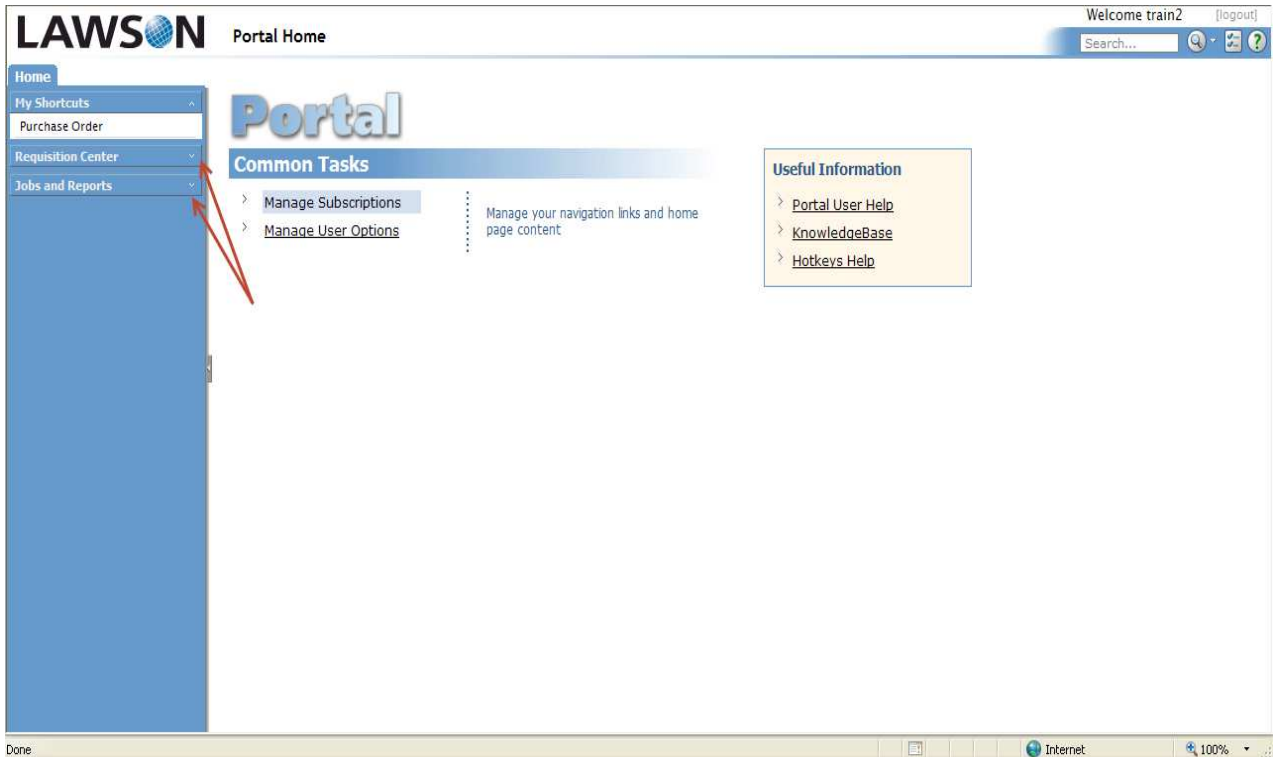
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Lawson Introduction and Navigation



A screenshot of a web browser displaying the Lawson Portal Home page. The browser's address bar shows "http://lawdev.downstate.edu/lawson/portal/". The page header includes the "LAWSON Portal Home" logo and a user greeting "Welcome train2 [logout]". A search bar is located in the top right. On the left side, there is a vertical navigation menu with categories: "Home", "My Shortcuts" (circled in red), "Purchase Order", "Requisition Center" (with sub-items: Line Status, Status, Shopping), and "Jobs and Reports" (with sub-items: Job Schedule, Print Manager, Job List). The main content area features a large "Portal" heading, a "Common Tasks" section with links for "Manage Subscriptions" and "Manage User Options", and a "Useful Information" box with links for "Portal User Help", "KnowledgeBase", and "Hotkeys Help". The browser's status bar at the bottom shows "Done" and "Internet" with a 100% zoom level.



4. Bookmarks can be hidden to show the application area, as shown below. Click on the **Parental Bookmark**:





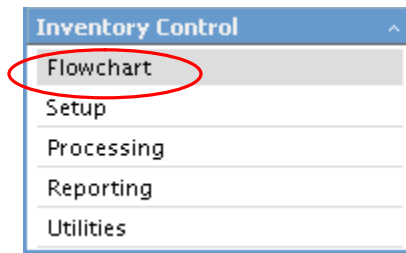
Using the Left Pane

The left, or navigation, pane is a menu of top level, or parent, bookmarks and their subordinate, or children, bookmarks.

- The left frame width is variable.
- Click a top-level bookmark to open or close the display of subordinate bookmarks.
- Double-click the Home tab to close or open all top-level bookmarks.

Bookmarks

Bookmarks for Lawson engine applications include a standard set of subordinate options: Flowchart, Setup, Processing, Reporting, Utilities, etc. as shown for Inventory Control below.





1. Click **Processing** under one of your bookmarks. A second tab displays those specific processing options, as shown below for Inventory Control Processing.



Home Page

2. Double-Click the **Lawson logo** in the upper left to return to the home page.



Form Display

When using Lawson, you will navigate to various forms in order to complete your work. Below are some terms that you should understand first:

Term	Definition
Form	A window (screen) used to accomplish a specific task such as entering, reviewing, or changing data. Each form has a title such as GL 40 , which is used for GL journal entries.
Field	Data points within a form, such as a company. A form consists of many fields.
Record	A set of related data that comes from a combination of fields.



Reports

Reports and batch jobs are run by processing a “Lawson job.” Each job has a Job Name and a Job Description. The Job Description will default with the description of the Lawson screen if it is not populated manually. There will always be a set of parameters to define for the job as well. Once a job is Added, it is available to run again in the future with the same parameters or different parameters. Each time the same job is run, it will overwrite the results of the job from when it was run previously.

1. Display the form for any batch job. The form clip below shows a **IC211 (Item Location Listing)** form. Give the Job a name and Description, then add the job parameters. Click the Add button to add the job.

A screenshot of the "Item Location Listing (IC211)" web form. The form is titled "Item Location Listing (IC211)" and includes a navigation bar with buttons for "Add", "Change", "Delete", "Previous", "Inquire", "Next", and "Inquire". Below the navigation bar are buttons for "Submit", "Reports", "Job Sched", and "Print Mgr". The form contains several input fields: "Job Name" (IC211WRS), "Job Description" (TEST LIST), "User Name" (bstory), and "Data Area/ID" (DEV). A "Parameters" section is expanded, showing fields for "Company" (11), "Location" (WHCSS), "Report Group", "Inventory Class Major", and "Inventory Class Minor". Red circles highlight the "Add" button, the "Submit" button, and the "Parameters" section.

2. After the job has been added or changed, it must be submitted for processing. To submit a job/report, click on the **Submit** icon near the top of the form.

The job scheduler and print manager can be accessed by displaying any batch job form.

The links on the top include:

- Submit
- Reports
- Job Scheduler
- Print Manager

Running a Report

3. Set up the job by completing the job form and clicking the **Add** button. Look for **Job Added** at the bottom left of the screen.
4. Click the **Submit** link in the top section of the form. The **Job Submit** form displays.



Submit Job -- Web Page Dialog

Job Name IC211WRS

User Name bstory

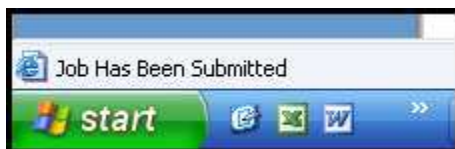
Job Queue

Start Date

Start Time (hhmm)

http://lawdev.i Internet

5. Click the **Submit** button. A message will appear that the Job has been Submitted.





Job Scheduler link

6. Click on the **Job Scheduler** link in the top section of the form.

All jobs are listed in reverse chronological order as shown below.

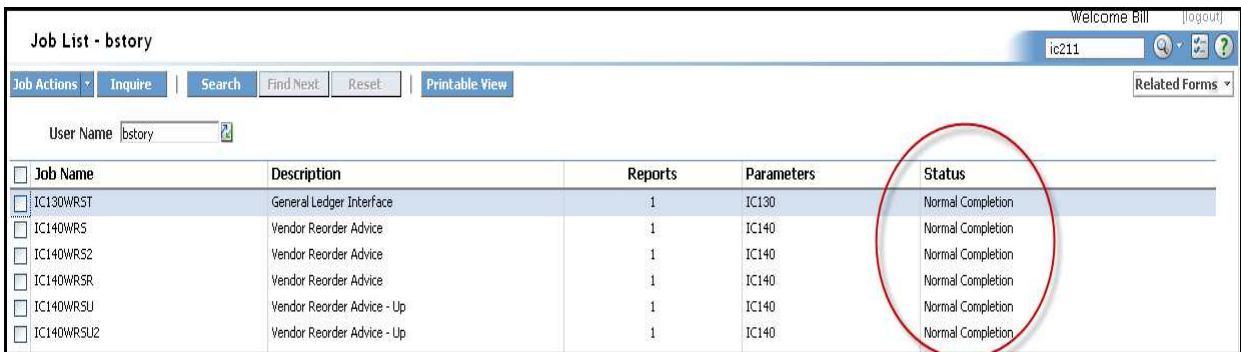
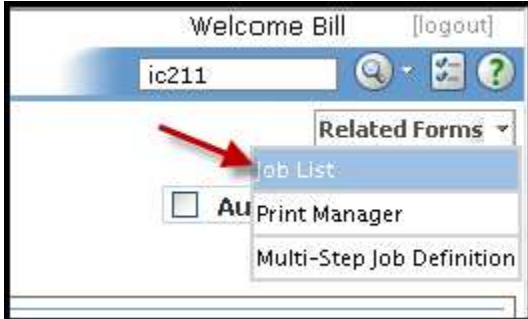
Job Name	Parameters	Job Queue	Start Date	Stop Date	Status
<input type="checkbox"/> IC211WRS	IC211	*****	03/19/2009 08:50:20	03/19/2009 08:50:26	Normal Completion
<input type="checkbox"/> PO230WRS	PO230	*****	03/18/2009 14:10:17	03/18/2009 14:10:21	Normal Completion
<input type="checkbox"/> IC130WRST	IC130	*****	03/16/2009 10:40:38	03/16/2009 10:40:46	Normal Completion
<input type="checkbox"/> IC191WRS	IC191	*****	03/12/2009 12:11:24	03/12/2009 12:11:25	Normal Completion
<input type="checkbox"/> IC192WRS	IC192	*****	03/12/2009 12:09:09	03/12/2009 12:09:10	Normal Completion
<input type="checkbox"/> IC192WRS	IC192	*****	03/12/2009 12:08:24	03/12/2009 12:08:25	Normal Completion
<input type="checkbox"/> IC179WRS	IC179	*****	03/12/2009 11:14:38	03/12/2009 11:14:39	Normal Completion
<input type="checkbox"/> IC270WRS	IC270	*****	03/12/2009 11:06:47	03/12/2009 11:06:48	Normal Completion
<input type="checkbox"/> IC170WRS	IC170	*****	03/12/2009 11:05:29	03/12/2009 11:05:31	Normal Completion
<input type="checkbox"/> WH130WRS2	WH130	*****	03/12/2009 10:58:36	03/12/2009 10:58:36	Normal Completion
<input type="checkbox"/> IC141WRSU	IC141	*****	03/12/2009 10:57:50	03/12/2009 10:57:51	Normal Completion
<input type="checkbox"/> WH130WRS2	WH130	*****	03/12/2009 10:55:16	03/12/2009 10:55:17	Normal Completion

There tabs to view Completed Jobs (as shown above), Active Jobs and Waiting Jobs. Active Jobs include the jobs that are currently in process. Waiting Jobs include jobs that are waiting in queue to be processed and those that have not completed successfully and are in “Needs Recovery” mode.

NOTE: If you cannot recover a job after one try, call the Help Desk.

Job List

Lists jobs run in alphanumeric order. Click on **Related Forms** in the upper right corner and click on “Job List”.



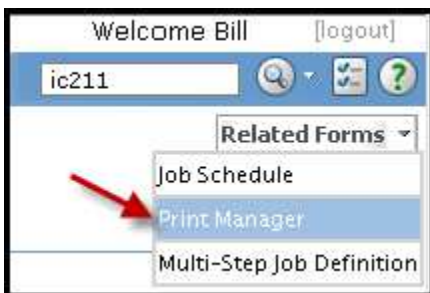
A screenshot of the "Job List - bstory" page. The page has a header with "Welcome Bill" and "[logout]". Below the header is a search bar with "ic211". There are buttons for "Job Actions", "Inquire", "Search", "Find Next", "Reset", and "Printable View". A "User Name" field contains "bstory". Below this is a table with the following columns: Job Name, Description, Reports, Parameters, and Status. The "Status" column is circled in red.

Job Name	Description	Reports	Parameters	Status
<input type="checkbox"/> IC130WRST	General Ledger Interface	1	IC130	Normal Completion
<input type="checkbox"/> IC140WRS	Vendor Reorder Advice	1	IC140	Normal Completion
<input type="checkbox"/> IC140WRS2	Vendor Reorder Advice	1	IC140	Normal Completion
<input type="checkbox"/> IC140WRSR	Vendor Reorder Advice	1	IC140	Normal Completion
<input type="checkbox"/> IC140WRSU	Vendor Reorder Advice - Up	1	IC140	Normal Completion
<input type="checkbox"/> IC140WRSU2	Vendor Reorder Advice - Up	1	IC140	Normal Completion

The Job List displays Jobs that have been requested and their status.

Print Manager Link

Click on **Related Forms** in the upper right corner and click on “Print Manager”.





Lists jobs run in alphanumeric order where reports can be viewed.

Print Manager - bstory

Welcome Bill [logout] ic211

Report Actions Inquire Search Find Next Reset Printable View

User Name bstory

Job Owner	Job Name	Description	Parameters	File Name	Created
<input type="checkbox"/> bstory	IC211WRS	TEST LIST	IC211	IC211.prt	03/19/2009 08:50:26
<input type="checkbox"/> bstory	PO230WRS	Unreleased Receivers	PO230	PO230.prt	03/18/2009 14:10:21
<input type="checkbox"/> bstory			POIE.1	away2	03/18/2009 12:37:17
<input type="checkbox"/> bstory			POIE.1	delvtdcs1	03/18/2009 12:37:17
<input type="checkbox"/> bstory	IC130WRST	General Ledger Interface	IC130	IC130.prt	03/16/2009 10:40:46
<input type="checkbox"/> bstory	IC191WRS	Item Master Audit Trail	IC191	IC191.prt	03/12/2009 12:11:25
<input type="checkbox"/> bstory	IC192WRS	ICLOC ITEM AUDIT	IC192	IC192.prt	03/12/2009 12:09:10

Print Manager - bstory

Report Actions Inquire Search Find Next Reset Printable View

View

Print bstory

Delete

	Job Name	Description
<input checked="" type="checkbox"/> bstory	IC211WRS	TEST LIST
<input type="checkbox"/> bstory	PO230WRS	Unreleased Receivers

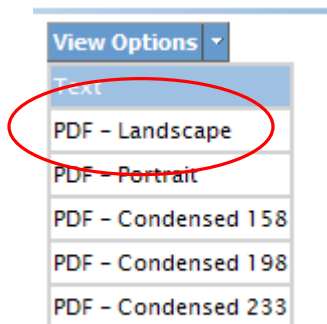
Print Manager displays a list of completed jobs for viewing. To view a job, check the box next to the job and select the View option from the Report Actions options. You can also place the pointer directly on the job and double click.



Report Display

A report's on-line display can be in one of 3 formats: XML, PDF or text. The format Lawson defaults is XML, however, the user can reset the default by clicking on **Manage User Options** and selecting another option. All versions can be accessed from the Print Manager View Options.

7. The "View Options" at the top of the form allows the user to select the text print option. Select PDF Landscape to view the output in that format.





Item Location Listing

IC211 Date 03/19/09 Company 11 - UNIVERSITY HOSPITAL OF BROOKLYN Page 1
 Time 08:50 Item Location Listing

Location WHCSS - INVENTORY MAIN WAREHOUSE

Item Number	100000	Last Issue Cost	-2000	Last Issue Date	03/11/09	Tracking	Y
Description	DSG TRANS TEGADERM 2 3/8X 2.75	Standard Cost	0.0000	Last Update Date	03/11/09	Bin Tracking	Y
	100 EA/BX 4 BX/CA (1624W)	Future Standard Cost	0.0000	Last Receive Date	03/11/09	Allow Receipts	Y
Buyer Code	Stock UOM EA	Last Cost	0.0000	Last Count Date		Allow Issues	Y
GL Category	1032 Secondary UOM	Market Price	0.0000	MSDS Date		Chargeable	N
Preferred Bin	BIN1 Storage Code	Overhead Cost	0.0000	Added Date	03/11/09	Active Status	A
Order Policy	POP Reorder Point Code F	Average Cost	-2000	Reorder Quantity Code F	Inspection	Required	N
Reorder Document Code	P Average Add-on Cost		0.0000	Special Cycle Count			
Minimum Order	0 Maximum Order	0	Economic Order Quantity	0	Order Multiple	400	
Reorder Point	400 Safety Stock	0	Movement Class 1	Movement Rank	0	Leadtime Control	M
Reorder Quantity	1200 Average Leadtime	5	Last Leadtime			Previous Leadtime	
Prime Vendor	101320 Vendor Item	10001624W	Replenish From Company and Location				
Purchase From Location	Vendor Description	DSG TRANS TEGADERM 2 3/8X 2.75	Forecast	Replenish From Bin			
Purchase Taxable	Purchase Tax Code		Sell Taxable N	Sell Tax Code			
Item Location Alpha 1		Item Location Alpha 2		Item Location Alpha 3			
Lot Tracking N	Serial Tracking N	OE Minimum Quantity	0	OE Maximum Quantity			0
OE Create PO N	OE Dropship N						

Item Number	100001	Last Issue Cost	.1000	Last Issue Date	03/11/09	Tracking	Y
Description	TAPE DURAPORE 3INX1.5YD	Standard Cost	0.0000	Last Update Date	03/11/09	Bin Tracking	Y
	1000L/BX 5/CA(15388-1)	Future Standard Cost	0.0000	Last Receive Date	03/11/09	Allow Receipts	Y
Buyer Code	Stock UOM RL	Last Cost	0.0000	Last Count Date		Allow Issues	Y
GL Category	1032 Secondary UOM	Market Price	0.0000	MSDS Date		Chargeable	N
Preferred Bin	BIN2 Storage Code	Overhead Cost	0.0000	Added Date	03/11/09	Active Status	A
Order Policy	POP Reorder Point Code F	Average Cost	.1000	Reorder Quantity Code F	Inspection	Required	N
Reorder Document Code	P Average Add-on Cost		0.0000	Special Cycle Count			
Minimum Order	0 Maximum Order	0	Economic Order Quantity	0	Order Multiple	500	
Reorder Point	500 Safety Stock	0	Movement Class 1	Movement Rank	0	Leadtime Control	M
Reorder Quantity	1500 Average Leadtime	5	Last Leadtime			Previous Leadtime	
Prime Vendor	101320 Vendor Item	100015388-1	Replenish From Company and Location				
Purchase From Location	Vendor Description	TAPE DURAPORE 3INX1.5YD	Forecast	Replenish From Bin			
Purchase Taxable	Purchase Tax Code		Sell Taxable N	Sell Tax Code			
Item Location Alpha 1		Item Location Alpha 2		Item Location Alpha 3			
Lot Tracking N	Serial Tracking N	OE Minimum Quantity	0	OE Maximum Quantity			0
OE Create PO N	OE Dropship N						

The Create CSV File option allows you to download the report into Excel. You will get a Download window giving you the option to save the file to a disk and then it allows you to save the file to your desktop.



Help Features

8. You can access the Lawson **Help** menu (upper right) from any form.



Below is a description of the Help Features.

Help Feature	Description
About	Displays information about the software version.
Hotkeys	Displays the available shortcuts.
Form Help	Displays information about the current form including the form purpose (i.e. Use GL40 to define and release journal entries).
Field Help	Displays information about the current field such as number of characters and what the field means (i.e. GL40 Types of Journal Entries).
Form Wizard	Available only for IT functions.

Security

If your security class does not allow you access to a certain screen, these are the messages you will receive: **0 hits for XX### and Form is Secured**. You may have full access to all screens or you may only have limited access depending on your security class. If you feel you should have access to a screen that you have been denied, contact your manager.





Logging Off

1. To exit the Lawson portal, simply click the **[logout]** in the upper right hand corner of the screen.

