**LAWSON PORTAL 9.0
REQUISITION CENTER (RQC): SHOPPING**

CONTENTS:

I. Logging In

1. Double click on the **Internet Explorer** icon on your PC desktop.
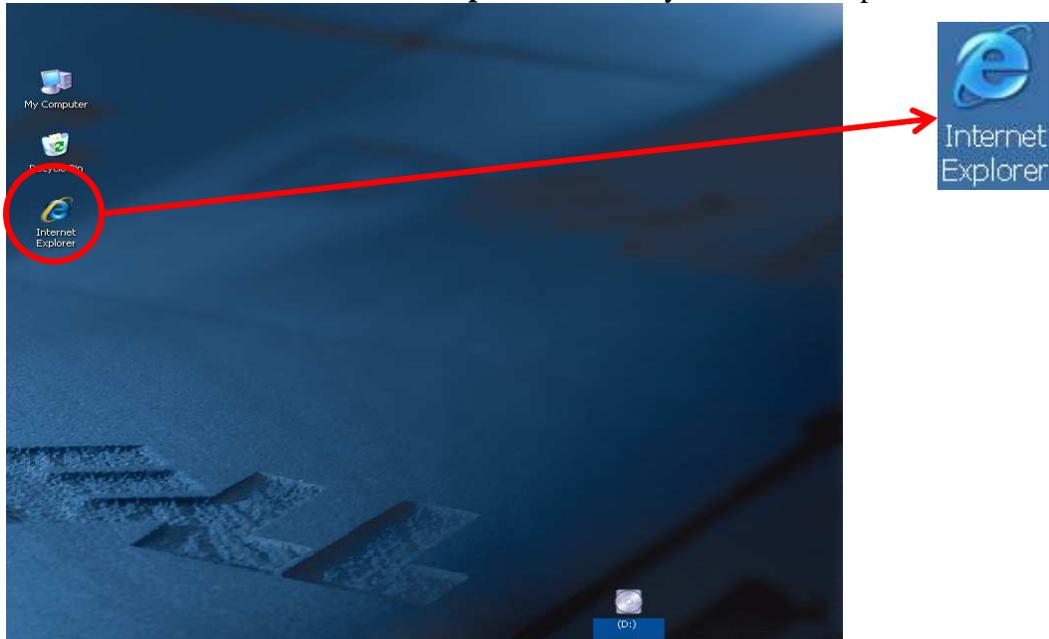
2. If not already there, go to the **Downstate** website @ http://Downstate.edu

3. Click on the **Administration** link, on the left hand side of the Downstate web page under SUNY Downstate.

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4. Click on the **Lawson** link, under the Administration
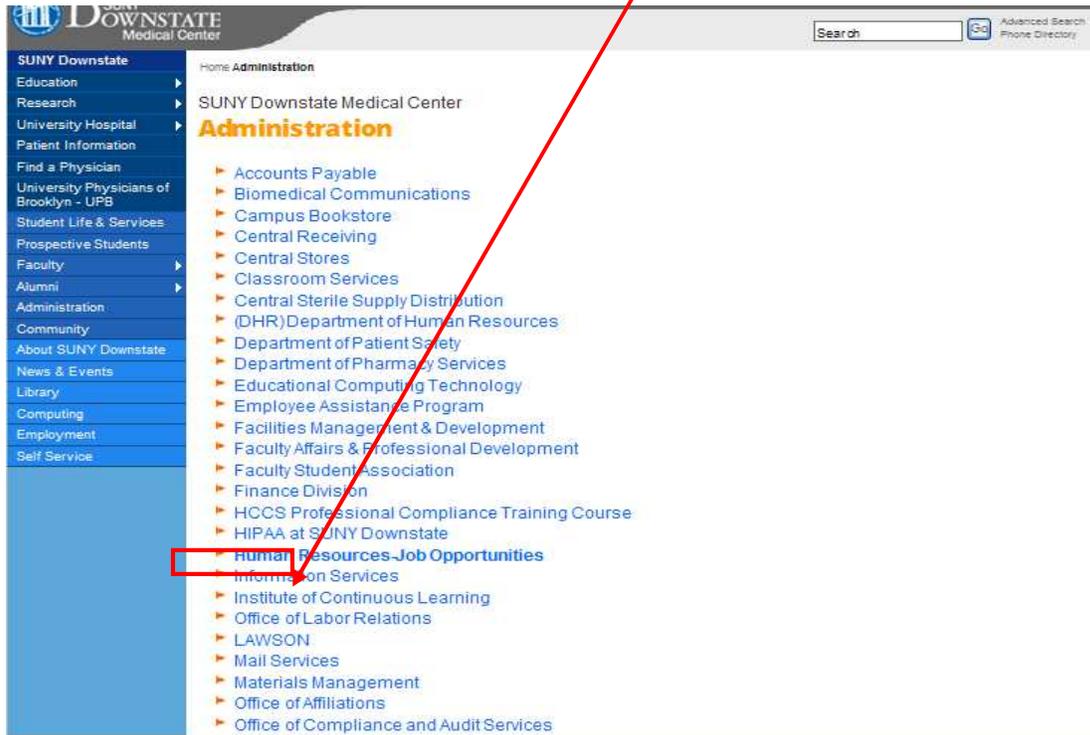
5. In the Lawson Portal Login screen, enter your **user ID**, in all lowercase characters.

6. Enter your **password** – this field is case sensitive.
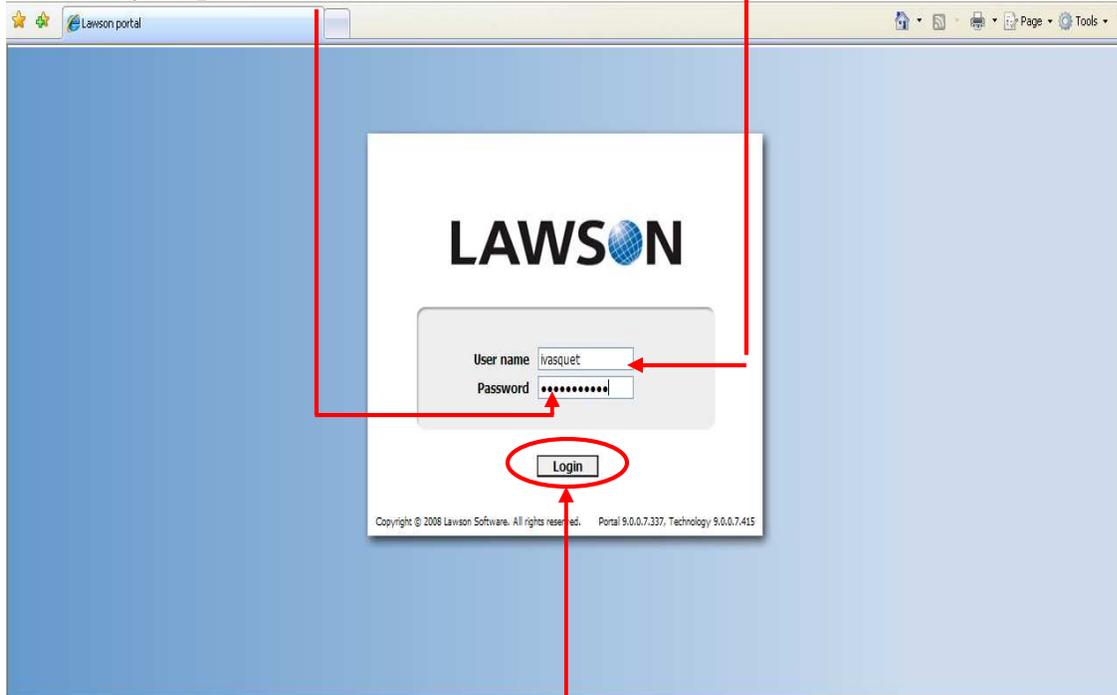
7. Click on the **Login** button to enter.

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8. Click on the **Shopping** link, under the Requisition Center Parent Bookmark.

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9. Requisition Center will open in a **new window**. Maximize the window if it is too small.
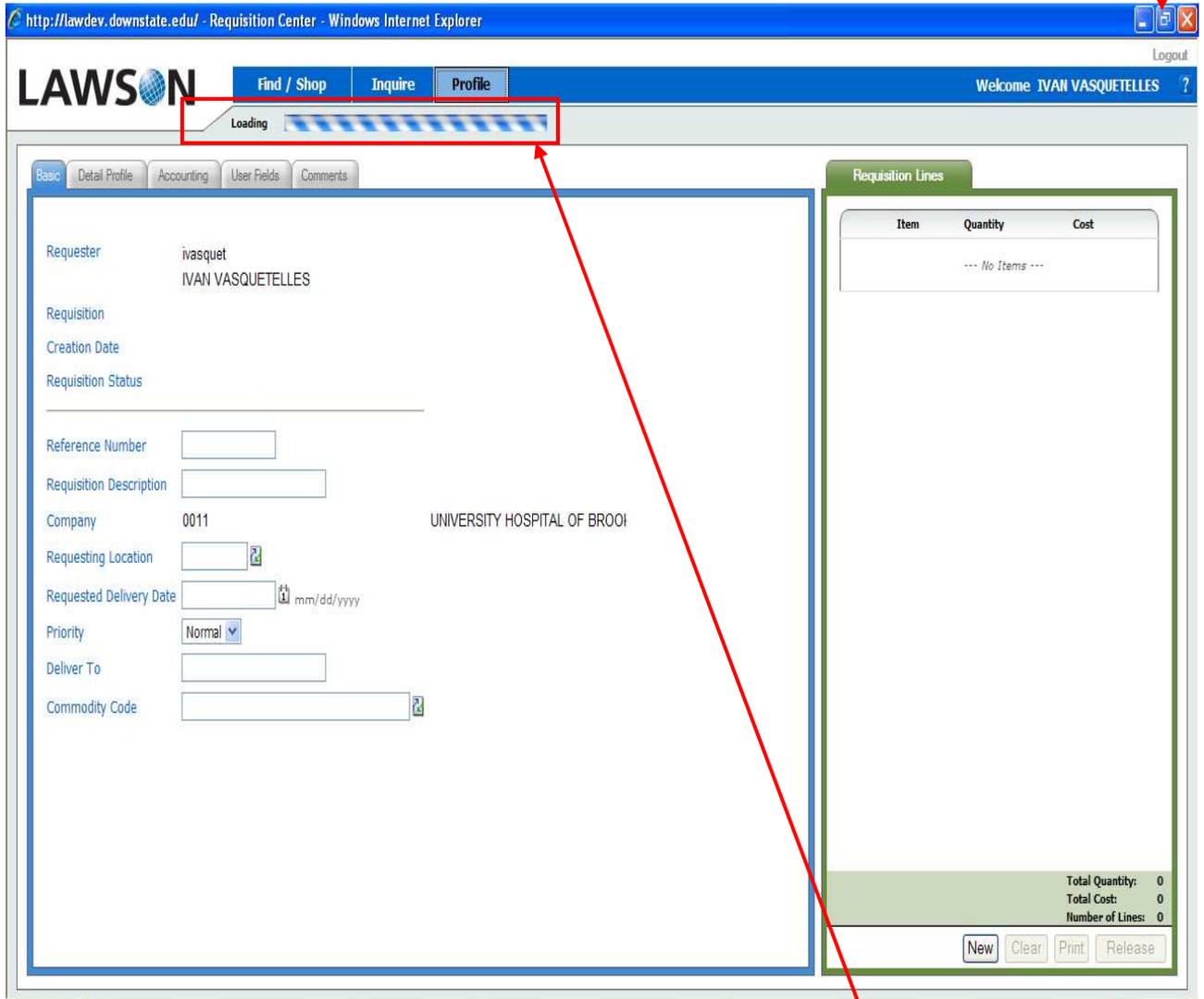
10. Wait until the rolling bar stops for the application to finish loading.

RQC - Main Screen

The RQC screen consists of four components:

1.) At the top of the screen is the main RQC Menu Bar. From the Menu Bar, users can select shopping options, inquire on existing requisitions and view their user profile.

2.) On the left side of the RQC page is the Information Window. This area displays user profile information, item information (when shopping) and order information (when in inquiry mode).

3.) To the right of the Information Window is the Shopping Cart. As items are selected for order, they are added to and displayed in the Shopping Cart.

4.) At the bottom of the Shopping Cart are Action Buttons that control the management of requisitions (New, Clear, Print, Release).

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II. Profile

A. Basic & Detail

1. Click on the **Profile** option at the top of the screen to enter your Basic profile.
   Note: All required fields are in bold and end with an asterisk (*).

2. In the **Requesting Location*** field, enter the requesting location the order is needed for.
   Note: Depending on your profile the Requesting Location may show a default. If the default shown is not the location you want to order then you can enter the Requesting Location information you want to order for or you can use the look up function.

   Look-Up Function – Select the following icon located on the right side of the Requesting Location field and the following screen will appear.

   Now you will need to select the Requesting Locations link

A new screen will appear and so that you can enter the Requesting Location you are searching for.
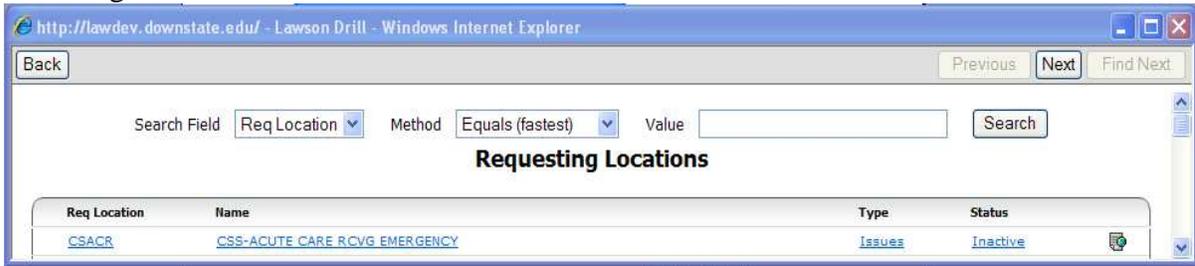
Select the drop down arrow and change the Method to "Begins with (fast)"
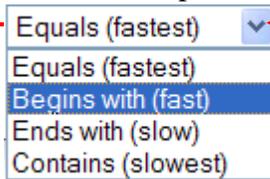
Within the Value field enter the first four characters of the requesting location you are searching for, and then select search

The search will bring back any Requesting Locations that start with first four characters entered in the value field. Now select the Requesting Location you want to order for.
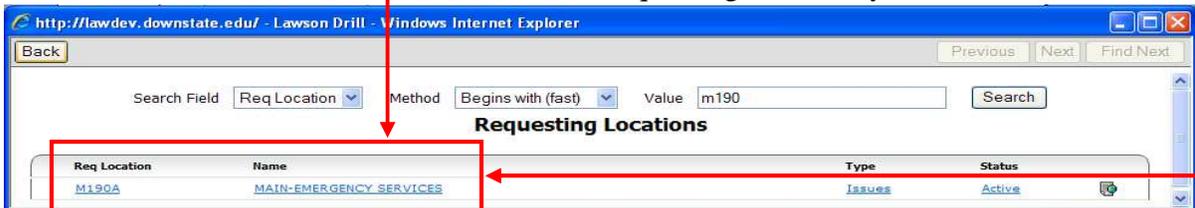
3. In the **Requested Delivery Date*** field, enter the expected delivery date in the format mm/dd/yyyy or select the date by clicking on the calendar icon to the right of the requested delivery date field, and then click on the desired date.

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4. In the Deliver To, enter the delivery information if receiving will need to bring the order to a different area then one listed on the Requesting Location record.
Deliver To field has a 30 character maximum.

Profile Data Access:
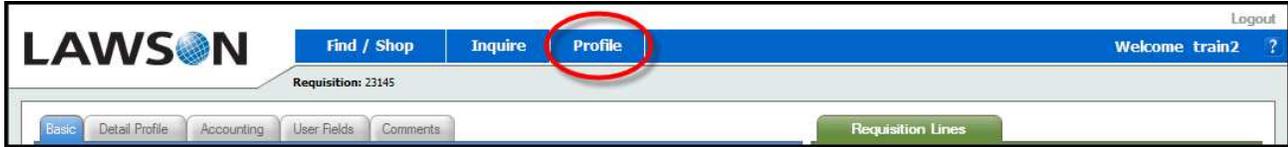
Profile data can be accessed any time during a shopping session by clicking the Profile link on the Main Menu Bar at the top of the page. Profile data can be accessed and changed at any point during a shopping session

A. **Comments**

Note: All required fields are in bold and end with an asterisk (*).

Use **Comments** to detail any special instructions for the buyer.

1. From the **Basic** tab, click the **Comments** tab.
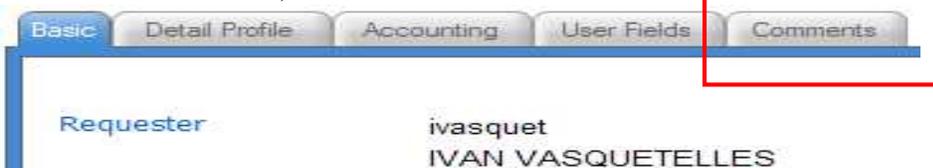
2. Click in the bubble to select **Comments to Print on Headers of Internal Documents***. These comments will appear on internal documents as the order moves through the process (Inventory Control, Purchasing, Receiving, and Accounts Payable).
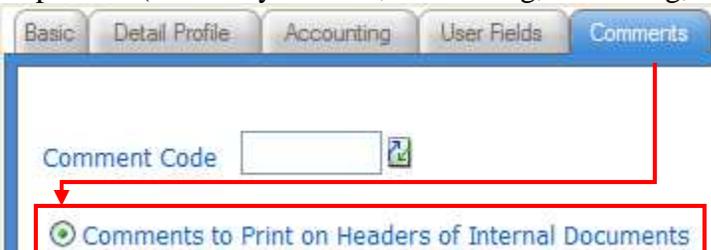
3. Enter desired comments in freeform field.

4. When finished entering needed comments, select the Update button to add / save the comments to the requisition. The Delete button is used for deleting unwanted comments. To edit the comment at any time during the shopping session, click the Profile menu option at the top of the page and then click the Comments.

III. Find / Shop

> **Shopping lists**, or templates, are lists of items that can be built for departments, to make ordering quick and easy. Shopping lists can be set up by MMIS, and will be detailed later on in this manual.

A. Shopping list Template

To start a shopping session, place your cursor over the Find / Shop option on the main menu bar. As the cursor hovers over Find / Shop, the shopping options are displayed (as a dropdown menu).
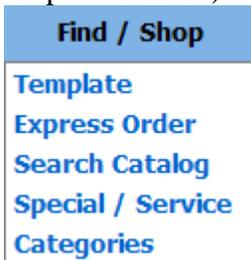
1. The Template option allows the Requester to view and select items off of a list of items custom designed for each individual Requesting Location.
2. Select the Template option by clicking it.

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3. When clicked, RQC displays a Template tab and prompts the Requester to search for a Template.
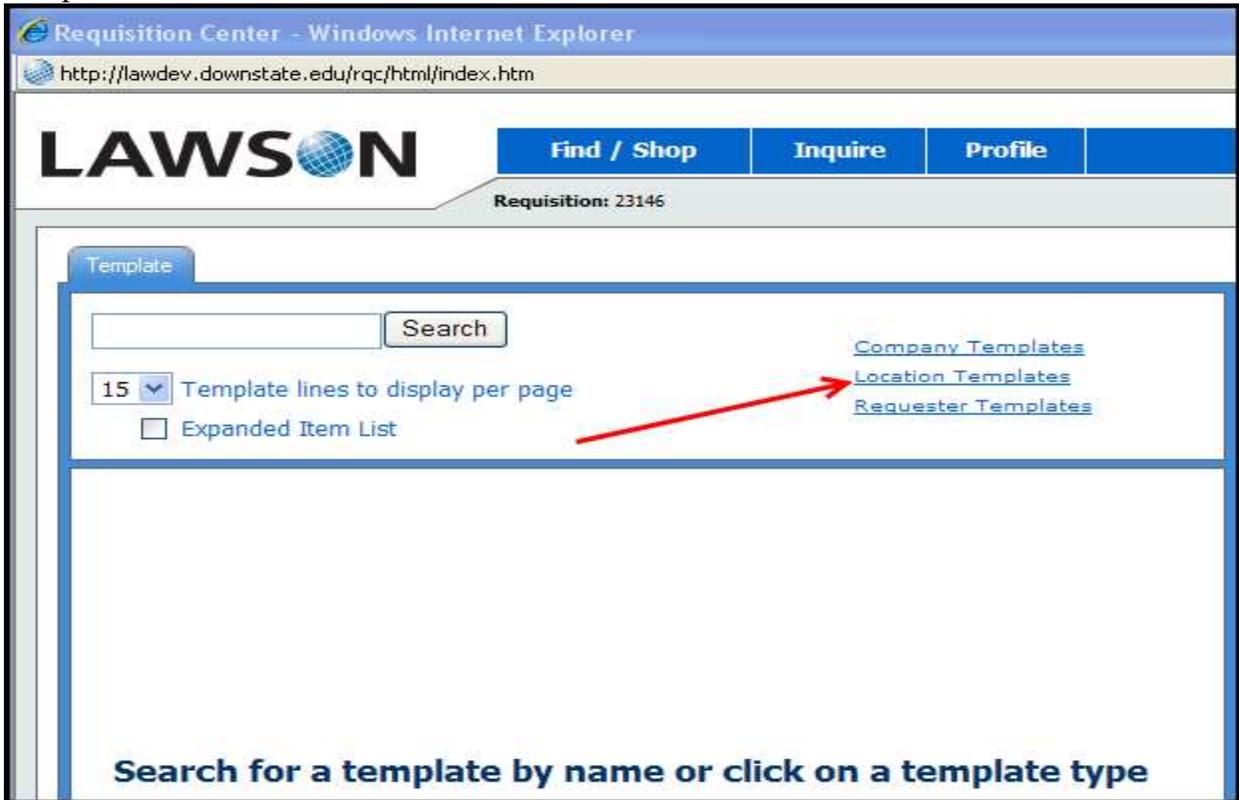
4. In the Template Search Screen, click the link for Location Template.
5. When this link is clicked, RQC opens up the Template list assigned to the Requesting Location.

6. If the Requesting Location you are ordering for has more than one Template assigned you will see a list of Templates to select from. If the Requesting Location you are ordering for only has one Template then you will only see one Template to select.
7. Once you select the Template you want to order from the Template list will open, use the displayed information to start shopping.
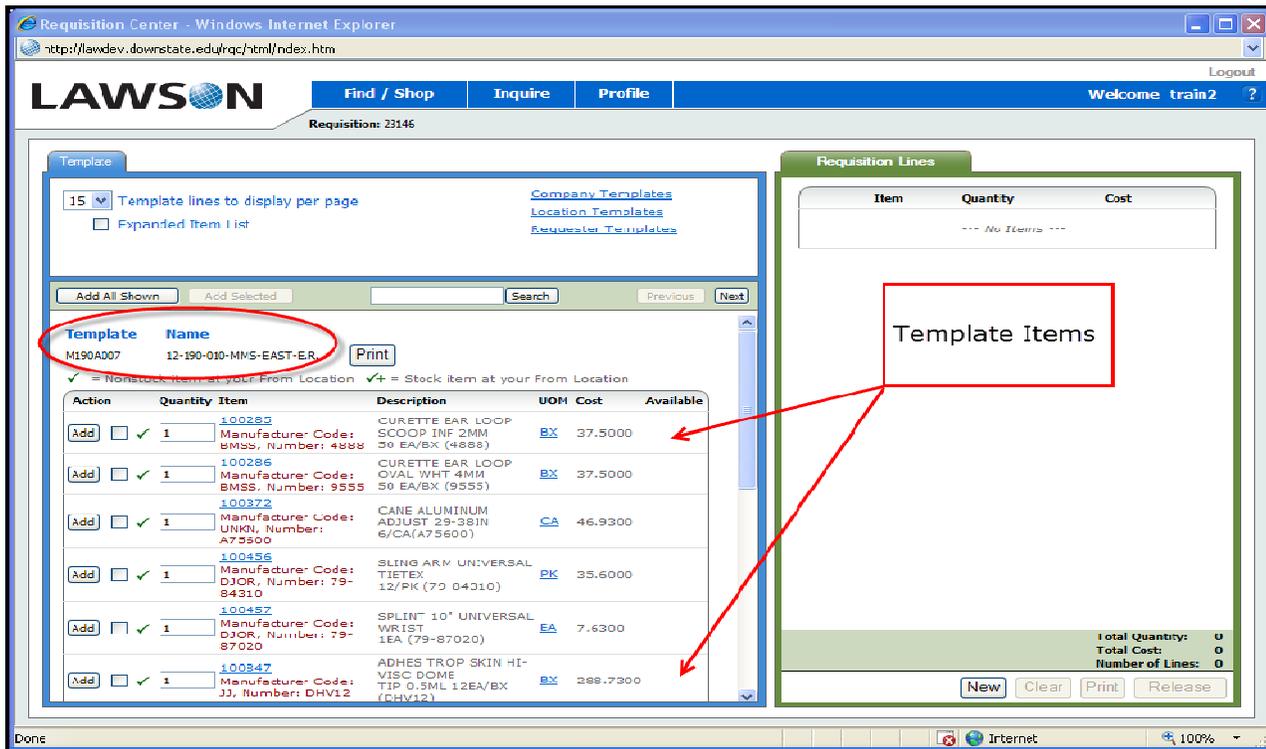
8. Requesting Location Template List window. Note the display of the Order Number, the Template List Identifier and Name. The Template List displays the Requesting Location's customized item list.

9. Note that items on the Template List are marked to indicate if they are Inventory Tracked (stocked) at your location (✓+) or if they are non-stock (✓):

10. Stocked item requests will be directed to and filled from an inventory location. Non-stock items will be directed to Purchasing and ordered direct from vendors on a Purchase Order.

   Notes: *Items with a green check mark are available to order from your location; items without the check will need information added, such as price or GL category, before they can be saved to your cart.*

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Searching a Template
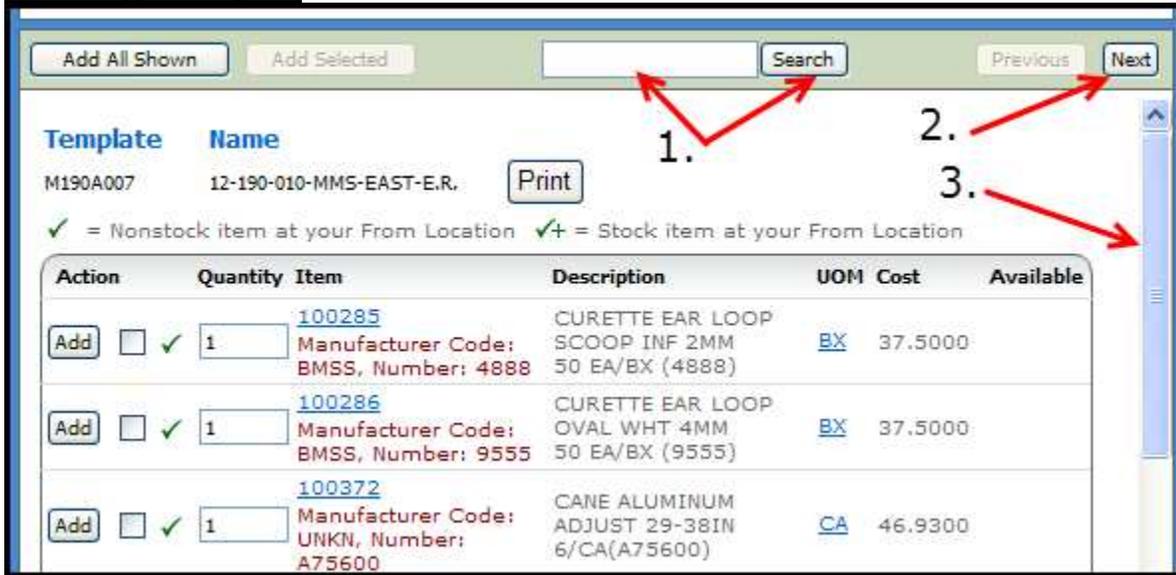
There are several ways to move around the template and /or find items.

1. You can search for items by entering item specific information in the search window and clicking the Search Button.
2. You can use the Next and Previous Buttons to advance from page to page
3. You can use the Scroll bar to move up and down the item list currently displayed
4. To search for items on the list that contain the word "AIRWAY":
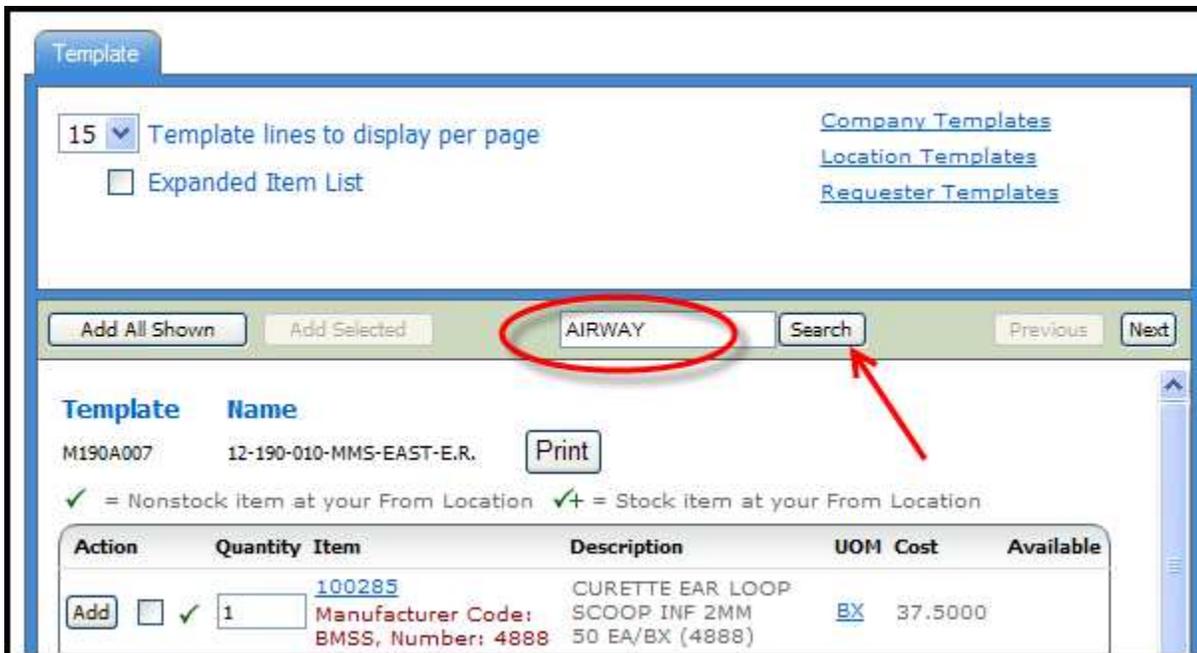
5. Enter "AIRWAY" in the Search Box and click the Search Button.

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6. RQC displays all Template List items with AIRWAY in the description. Note that the Template List name and Search Criteria are displayed for reference purposes.

7. To order item 127157, "AIRWAY NASOPHARYN LTEX ST 32FR " click the Item Number (highlighted in blue)

(1) After clicking the item number, RQC returns to the template list with the requested item displayed at the top.

(2) To order the item, enter the desired quantity in the Quantity box and click the line's Add button.

8. RQC adds the item to the Shopping Cart.
9. Note that once the Shopping Cart has items, it displays a summary for the items in your cart (item count, line count and total cost).
10. To order additional items, continue selecting items from the Template List and adding them to the Shopping Cart.
11. Items can also be selected randomly from the list and added to the cart. There are two ways to do this:

Add selected option:

1. Click the box next to each item you want to add to the Cart and enter a quantity in the Quantity box
2. Then click the Add Selected items button in the Template List header area.

3. Alternately, add a quantity to each item Quantity box and click the Add button next to each item:

4. Once Add is clicked, the items are added to the Shopping Cart:

5. The new items are added to the Shopping Cart.
6. Note that the order summary is now updated to show a Total Quantity of 11, Total Cost of $188.33 and Total Number of Cart items = 5.

The ADD ALL option:

1. The Template List option also allows the Requester to order <u>EVERY </u>item on the Template List by clicking the ADD ALL option button.
2. Note that every item on the Template List has a "1" defaulted in the Quantity box.
3. Clicking the ADD ALL Button will order at least 1 of every item on your custom supply list.
4. Do Not Click ADD ALL unless you really want to order EVERYTHING on your list.

Managing the Shopping Cart

The Shopping Cart displays the items ordered, a summary of item information and provides options for managing the Requisition (and Requisition Lines).

1. The Delete Button 🗑 (an icon that looks like a Trashcan) allows the Requester to remove items from the Shopping Cart. Click the icon to remove the item from the cart.

2. The Line Information icon ⓘ displays information about the line if the cursor is hovered over it:

3. The Information icon can appear in other places during an RQC shopping session. For example, when inquiring on the status of a requisition, there is an information Icon that gives you the status of the Request.

Shopping Cart Action Buttons

1. Shopping Cart Action Buttons determine how the Requester will manage the shopping session. The order can be saved, checked out, printed, cleared, etc.
2. Each Action Button has a different function:
   a. New – the New Button clears the current requisition and creates a new one. Prior to clearing the screen however, RQC does give you the opportunity to save your current requisition if you have not already done so (see below).
   b. Clear – Clears out the current contents of your cart. RQC will ask if you are sure you want to clear the cart contents before processing the request (see below).
   c. Print – Directs a copy of the current requisition to a printer (see below).
   d. Release – Saves, Completes and Releases shopping process for the current order.

If you click the "New" button before you select the "Release "button will save your current Requisition order for modifying at a later date and will create a new Requisition for a new order.

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If you click the "Clear" Button you will receive a warning message. Clicking "Yes" will clear out the current cart contents but leaves current order number open. "No" cancels the Clear action.
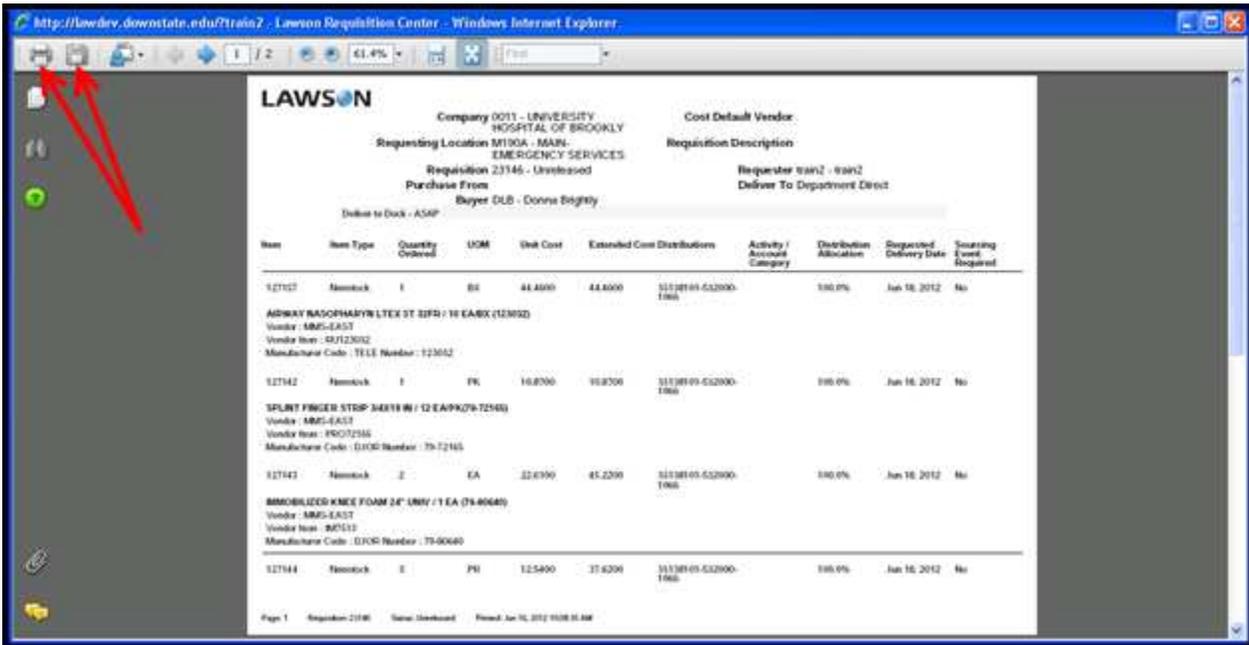
"Print" display – Print allows the Requester to send a copy of the order to a local printer or save a copy onto the computer. Click the print icon "🖨" to print a copy of the order or click the save icon "💾" to save a copy of the order to complete this action. See above screen shoot.

"Release" Message. Note that once the request goes into a Processed Status, it can no longer be updated or changed. Click OK button to acknowledge the status

After clicking OK, RQC returns to a blank Shopping Screen. From this point, the Requester can Logout, create another order (Find/Shop) or Inquire on existing orders.
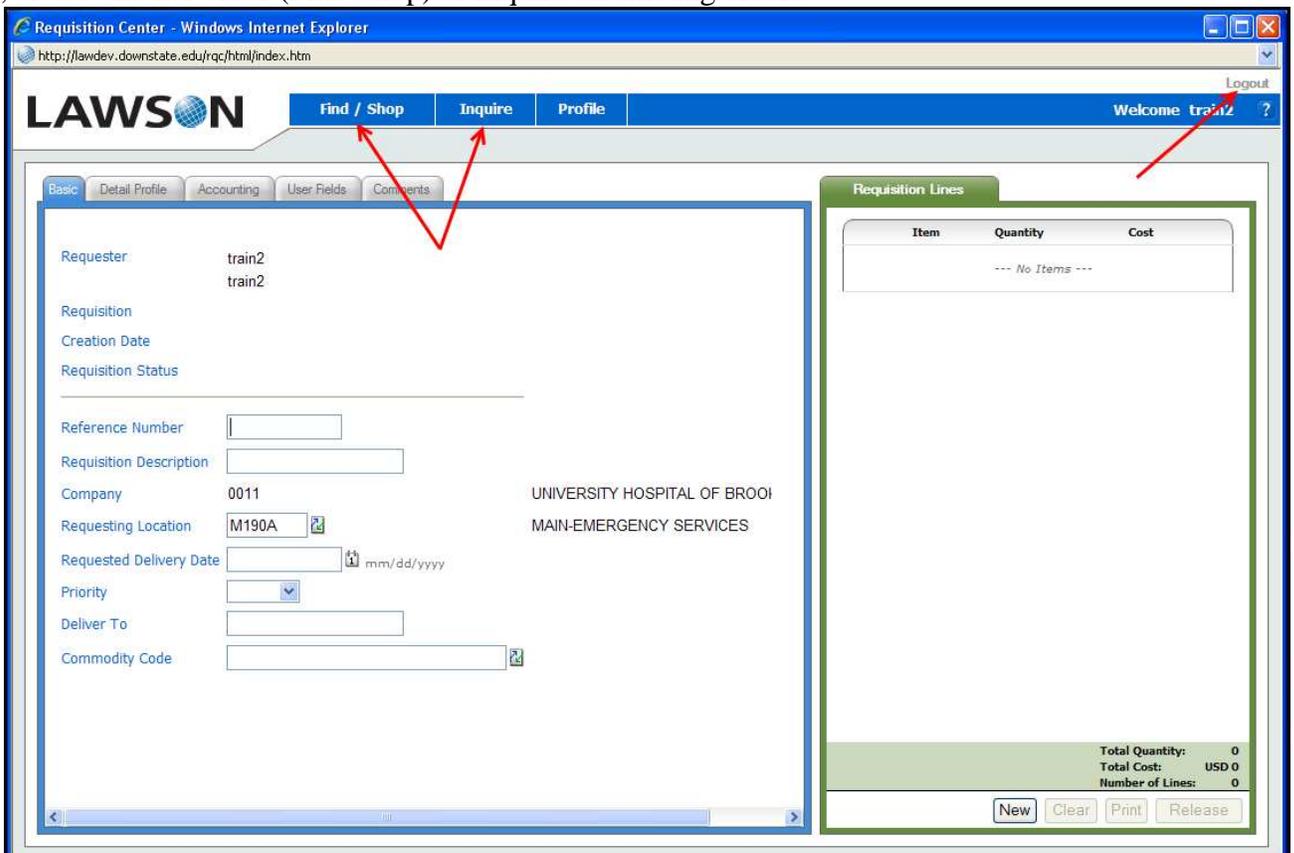
Ordering for a Different Requesting Location:

Some Requesters can order for different Requesting Locations. To do this, they must change the Requesting Location that it initially to defaults on the Basic tab of the Profile screen:

1. To enter an order for another Requesting Location, change the Requesting Location Code in the Basic Tab on the Order Profile. Either manually enter the new Requesting Location Code or select it from a list.

2. To select from a list, first click the ⬔ Menu Button next to the Requesting Location field.
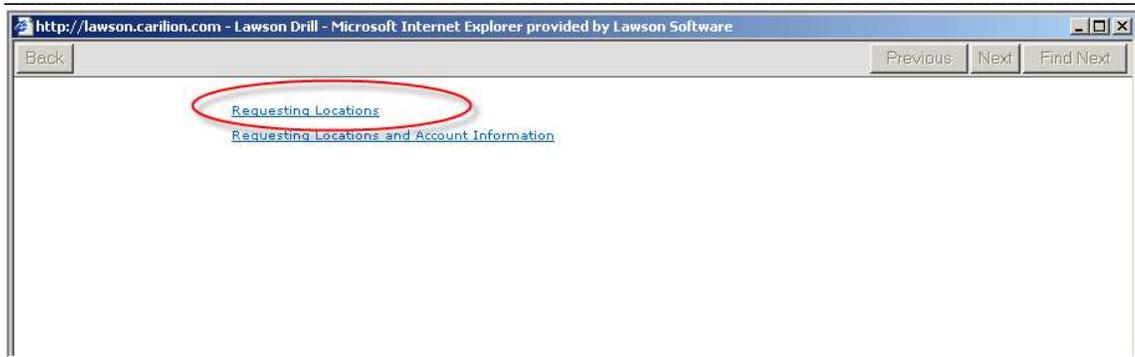
3. In the drill window, click on the Requesting Location link
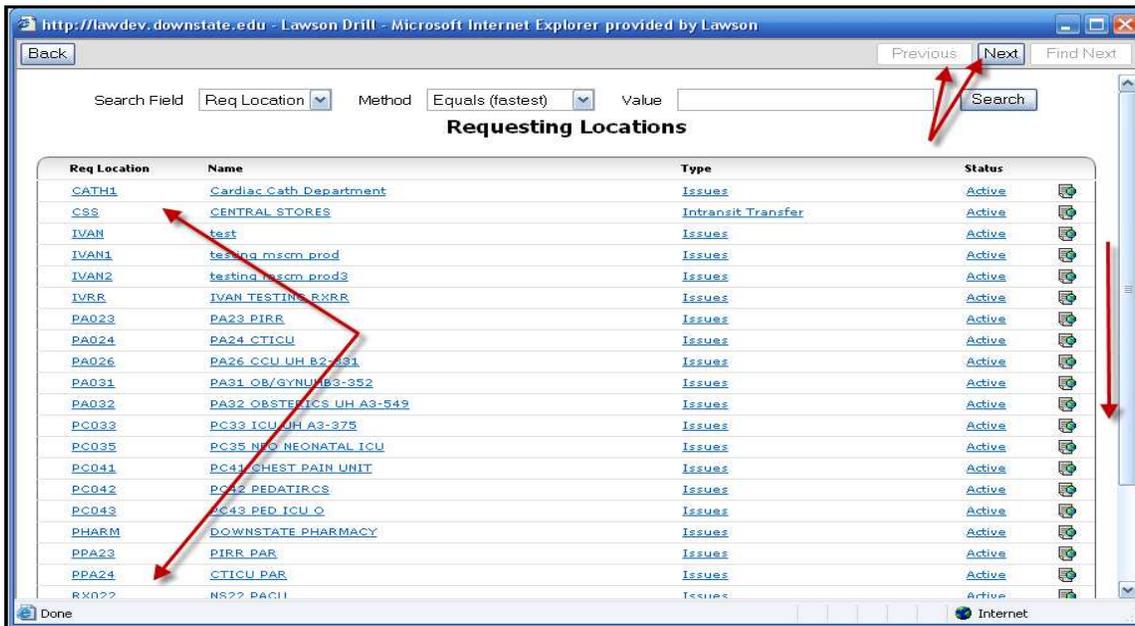
4. In the Requesting Location window, you have two ways to find and select a new location.
5. Review the displayed list and click on the desired Req Location Code. If the Location is not displayed, use the Scroll bar and the Next / Previous buttons to advance through the list until you find the Location you want.
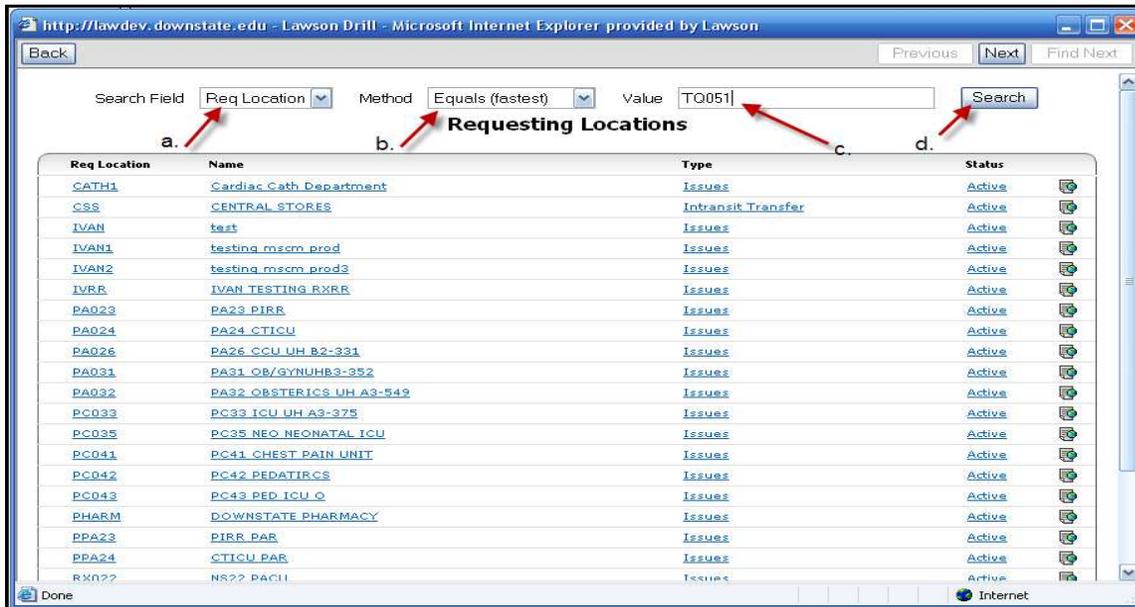
6. Or, search for a Requesting Location if you know all or part of the code. To find "TQ051":
   a. select Req. Location in the Search Field
   b. Select "Equals" in the Method field
   c. Enter "TQ051" in the value field
   d. Click the Search button
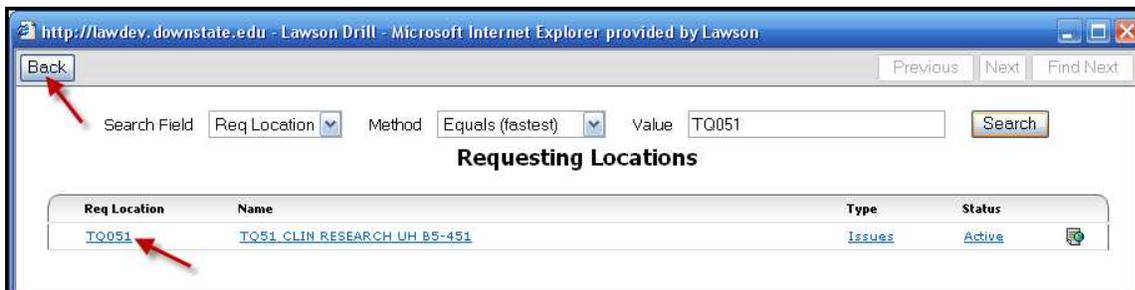
7. Click the TQ051 Requesting Location code to select it. Click the Back button to return to the Req Location list and search again
8. Once clicked, RQC returns to the Basic Profile tab and enters "TQ051" in the Requesting Location field.

To start a shopping session for this requesting location, return to the Find / Shop menu option and select Template. Note: you can only select and order for one Requesting Location per Requisition.

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B. Express Order
  Note: All required fields are in bold and end with an asterisk (*).

  Express Order is used when you know the Lawson numbers of the items you want to order.
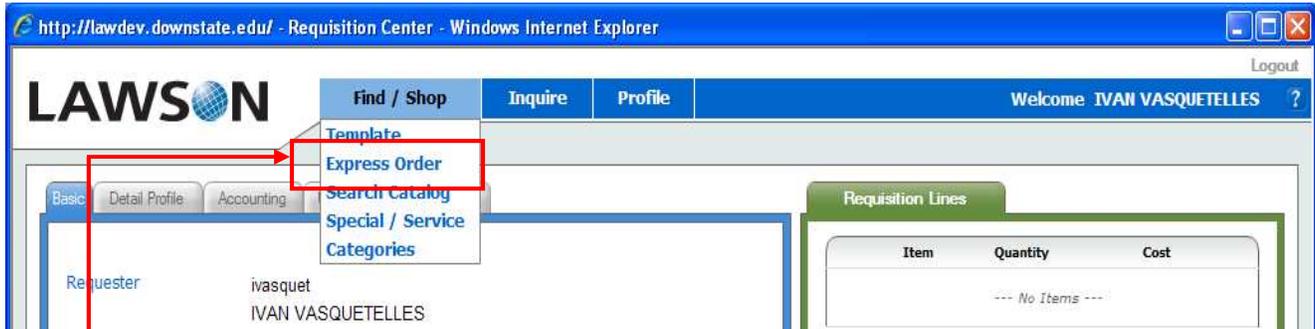
1. Select the Express Order option by clicking it.

2. In the **Item*** field, enter the Lawson number of the item you want to order.

3. Select the find button to pull up the description and unit of measure.

4. Click in the **Quantity*** field to adjust the qty. as needed.
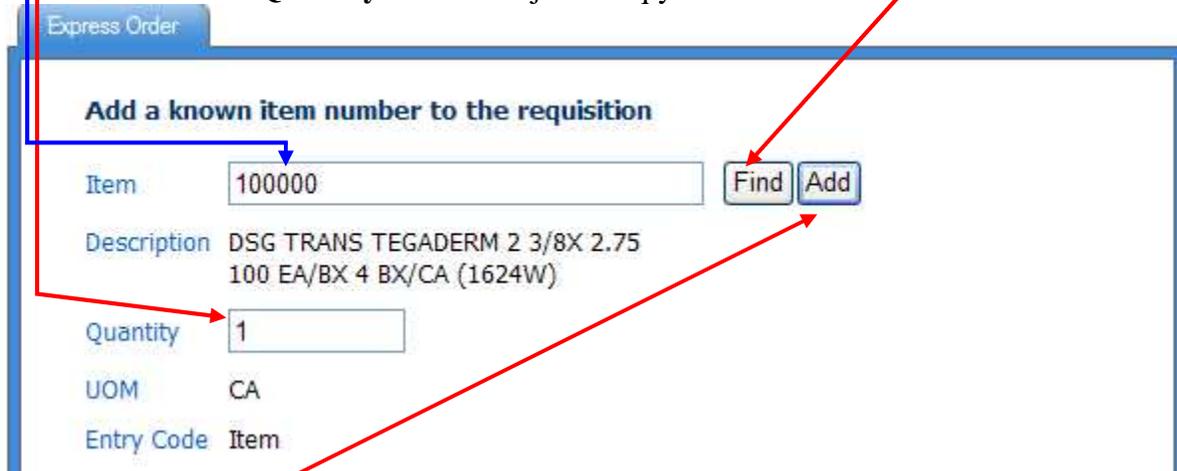
5. Click the **Add** button to add the item to your shopping cart.

6. After you have selected the Add button Express Order Form will be cleared out, so that you may order another item if needed.
7. Once order has been completed select the release button to release the order

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C. Search Catalog

Note: All required fields are in bold and end with an asterisk (*).

Use **Search Catalog** to look for a Lawson number by any one of various search criteria's such as manufacturer number, vendor number, description, etc.
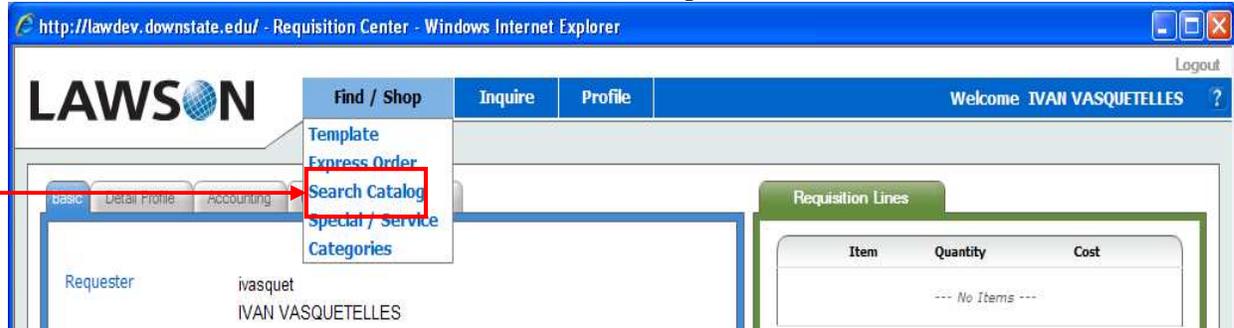
1. Select the Search Catalog option by clicking it.
2. In the empty field under the **Search** tab, enter the data you want to search for.
3. Click the **Search** button to obtain results.
4. Adjust the quantity in the **Quantity*** field for any item(s) you would like to order.
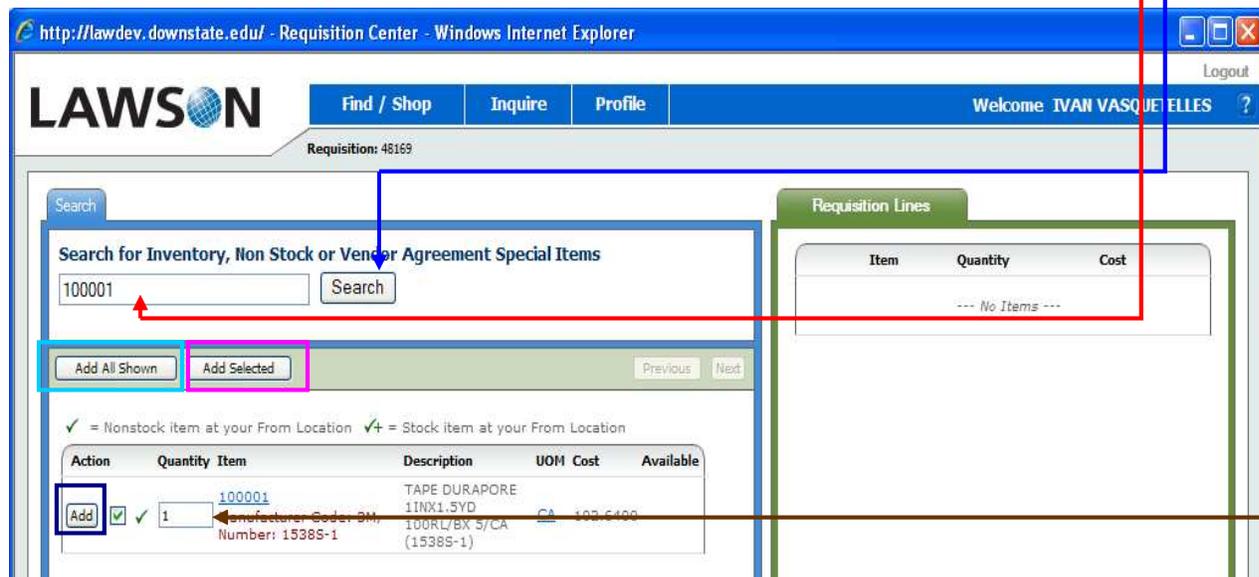
5. Add the item(s) to your shopping cart using one of the three methods available:
   - Click the **Add All Shown** button to add all items from the listing to the cart;

   - Click in the check boxes of the items you want to add, and click the **Add Selected** checked button to add only the checked items to your shopping cart;

   - Click the **Add** button alongside of each item you want added to your cart.

6. Once order has been completed select the release button to release the order.

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D. **Special Items**
   <u>*Note*</u>*: All required fields are in bold and end with an asterisk (*).*

*** NOTE – Prior to starting the shopping process, you must determine if the goods to be ordered are "Bill Only" items. Bill Only items are goods that have been delivered directly to the Healthcare system by a sales rep, been consumed and now require the issuance of a Purchase for payment only. If the order qualifies as such, follow the specific steps for vendor entry below.

Use the **Special / Service** option to order items which have been searched for but are not yet in Lawson. An item is a **special**, or X, item if it is any tangible item that will need to be received by the workers in the receiving dock. For example, a stent, boxes of catheters or case of gloves are tangible items that would need to be received.
Note: If the special, or X, item you are ordering will need to be ordered again, please submit the item information to your buyer. Always perform an item search through the ***Search Catalog*** *option detailed in the previous section of this manual* ***before*** *entering a special item.*
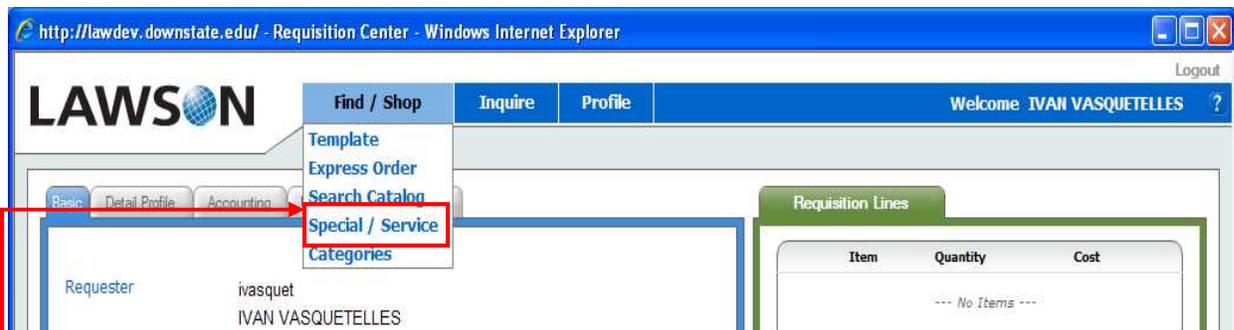
1. Select the **Special / Service** option by clicking it

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2. Since this item is not set up in the system, it is necessary to enter as much information about the item as possible.

3. Information should be entered in the following fields (***** = **Required**):

4. For defaulted values, use the values that Lawson has defaulted from the setup.
5. Follow these steps for all other fields (example):
   a. Item – Enter the Vendor Part Number
   b. Description – Enter a general to specific description in the Description field (character maximum)
   c. Item Type – Special (leave the default)
   d. Quantity – Enter the quantity in the Unit of Measure to follow

e. Unit Of Measure – Enter the SUNY standard 2 character Unit of Measure. If you are unsure of the right abbreviation, click the drop down menu button and select from the list.
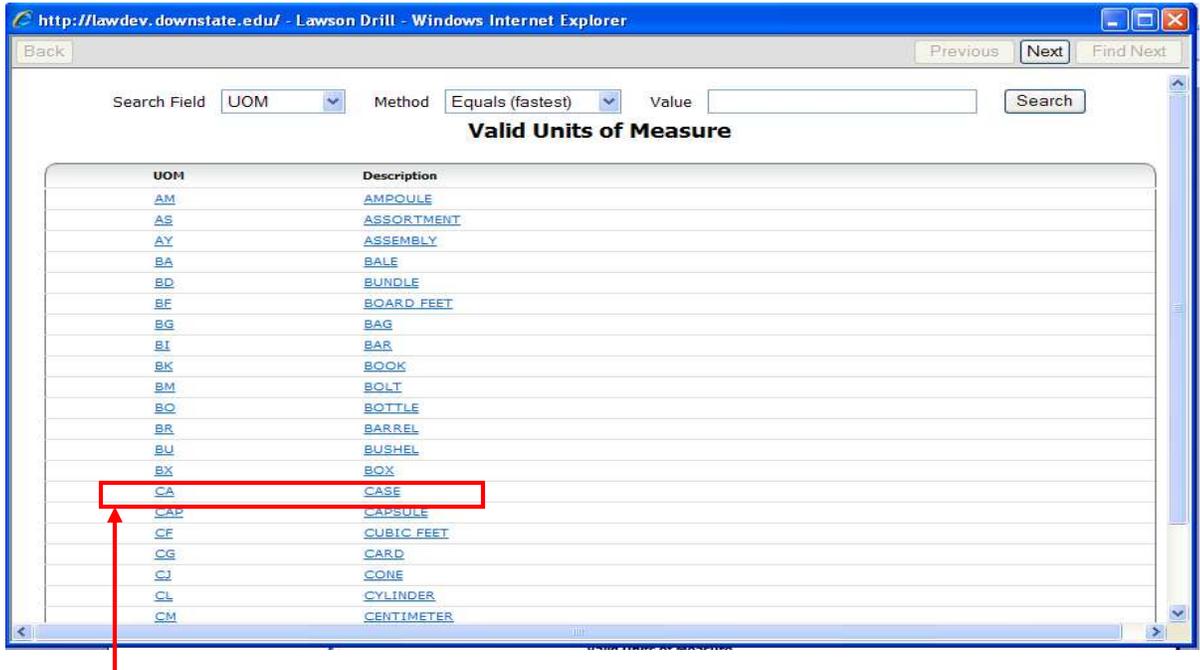
Click "CA" to select the Unit of Measure for Case or you can also search two different ways.

1.) By selecting the Next button on the top right hand side.
2.) By entering a value within the Value field which will search on the UOM or Description field.
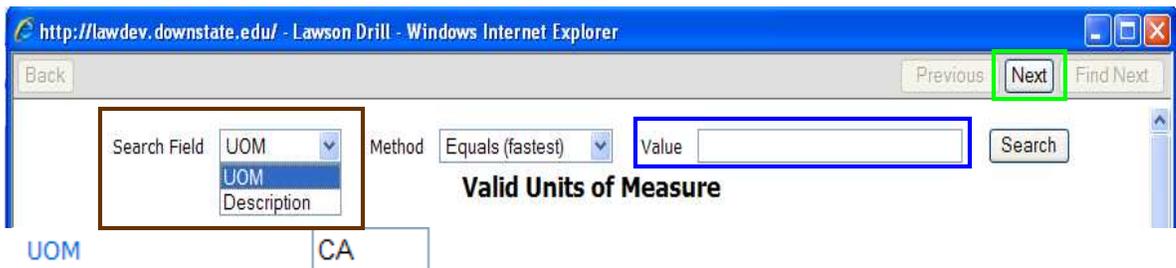
f. Cost - Enter the Cost for the item (and unit of measure)

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g. Cost Default Vendor – Enter the Vendor Code or select from the drop down
menu:

Click the Active Vendors By Name link

Select from the display, click a number or letter button to advance to those pages or
enter a value for search. Click in the Name field when the vendor is found

h. Purchase From – Enter the Vendor Purchase From code or select from the list
following the same procedure in g.
i. ** NOTE Regarding Bill Only requests and vendors** If the item can be
classified as Bill Only and the requester has identified the Vendor as an EFAX or
EDI vendor, they must enter "PUR1" as the Purchase From identifier. Using this
code insures that the Purchase Order created from this requisition is not
inadvertently communicated electronically to the vendor – causing a double
shipment.
j. Distribution Company – Leave Default value
k. Accounting Unit – Leave Default or enter a new value

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l. Account – Enter a value of select from Drop Down:

Click Active Detail Accounts

Click on a value from the list or search for the value. Note the Account and Sub Account relationships and try to select the correct combination

m. Sub Account – Should default from Account entry in k.

6. Once all the required information is entered, click the "Add" button to Add the item to the Shopping Cart.

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7. The item has now been added to the Shopping Cart. Note the Order number and the order statistics.

8. To order another item, click Specials / Service option under the Find / Shop menu. Repeat the above steps until all required items are added to the Shopping Cart

9. When all items are added to the Shopping Cart, move over to the cart area to complete the order

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10. Once order has been completed select the release button to release the order.

IV. Requisition Inquiry

Requisition Inquiry:

The Order Inquiry function allows requesters to look at information specific to their requisitions. This information might include approval status, purchase or issue status, checkout status, etc. Inquiries can be entered for individual requisitions or for all requester requisitions. Requisitions that have been released can be opened for additional processing. An existing requisition can also be selected and copied from the Inquiry screen.

To inquire on existing orders, click the Inquire menu option at the top of the page.
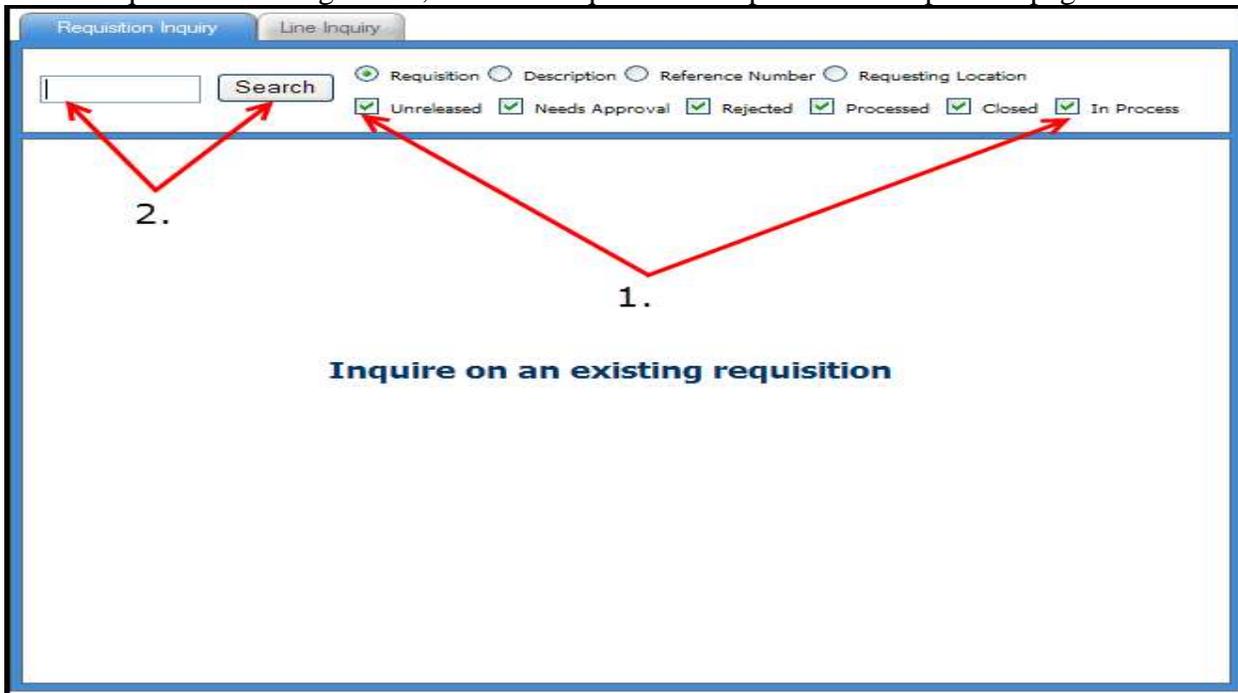
1. The Inquiry window provides many ways to search for your orders. You could search for an individual order or all orders. You could search for all unreleased orders, all closed orders, etc.
2. The easiest method to use is simply to leave the Search Window blank and click the Search Button.

The Inquiry screen lists your orders in descending order. It displays order number (in blue), Requesting Location, total order cost, order status and order date. Order Status key:

1. "Processed" orders are waiting additional processing within either the Inventory Control or Purchase Order systems.
2. "Closed" orders have already completed this processing.
3. "Unreleased" orders are still open to the Requester to maintenance.
4. "Needs Approval" status orders have been Checked Out but still require an additional level of approval before they can move on for processing.
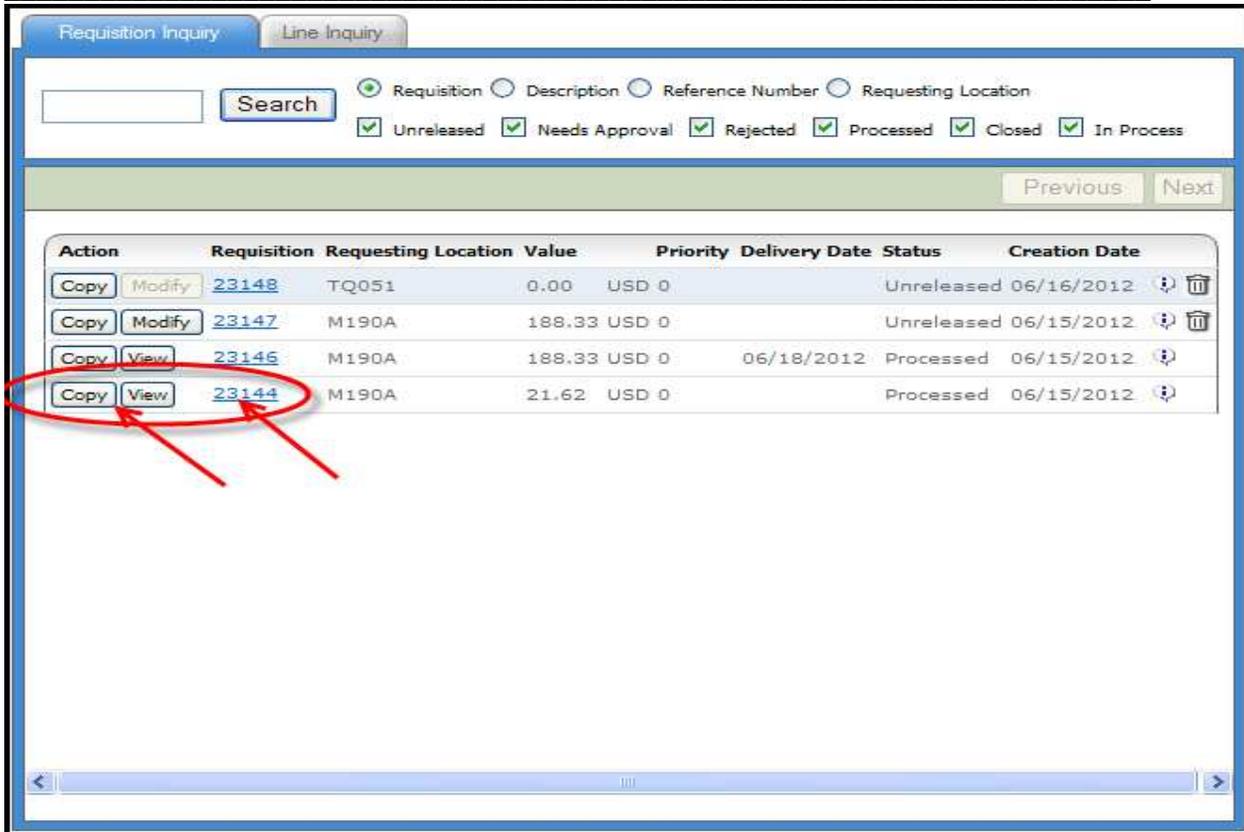
To work with a specific order in the Inquiry window, you have three options: Copy the order, View the order or Inquire on the order.

Inquire on an Order:
1. Most Requesters will use the Inquiry process to check on the status of their orders.
2. To inquire on the order, click the order number (in blue).
3. RQC opens a Drill Window and displays order information. Options highlighted in blue can be clicked and reviewed

4. Note that only two options are highlighted in blue: Requisition Header Detail and Requisition Lines. Clicking on either of these links will open additional drill windows with more information.

5. **To Assess The Purchase Status of an Order:**
    a. Click the Requisition Lines link (from above)
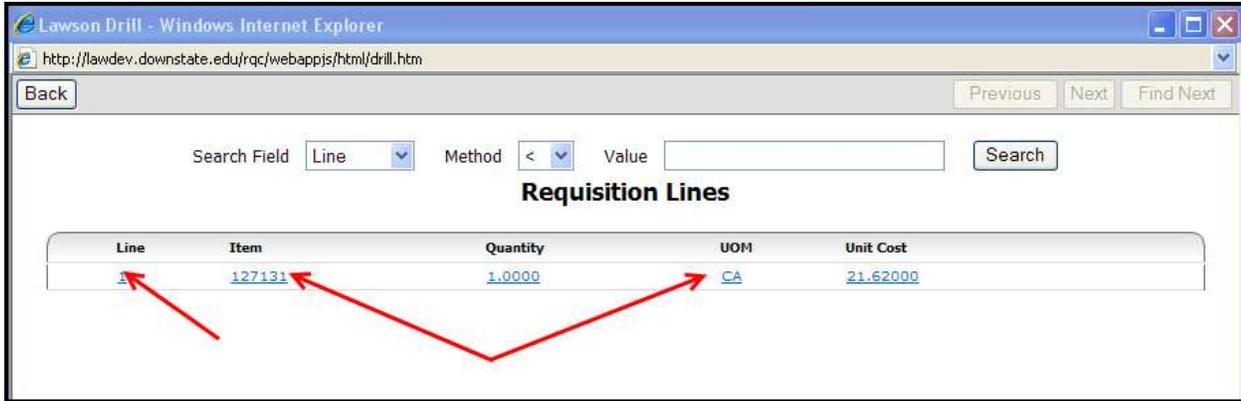
In the Requisition Lines Window, note that you have many different fields that you can drill on. Any field that is highlighted in blue is drillable.

    b. To find Purchase Order Detail for this line, click the Line Number (1)
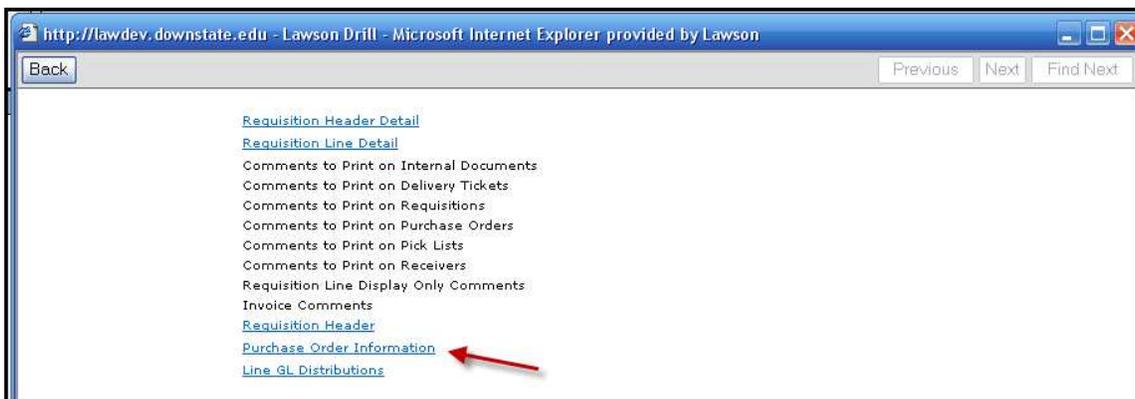
    c. In the Line Detail window, click the link for Purchase Order Information
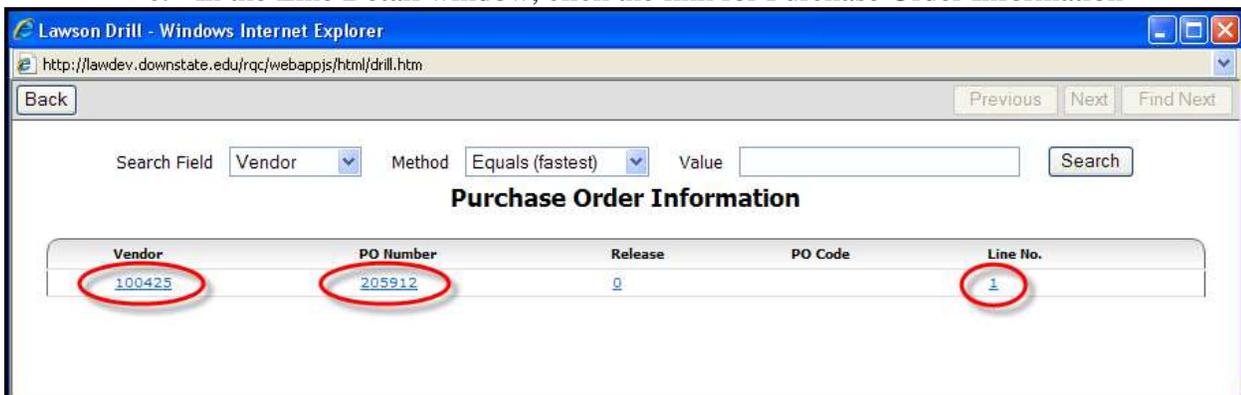
    d. Purchase order information is displayed. Note that you could drill further into the Vendor, PO Number or Line Number (to get due date, receipt date, etc.).
    e. To return to the Inquiry window, click the X to exit or click the Back Button until you are back at the main window.

Viewing an Order:

1. At the Inquiry window, click the View Button next to the order you want to review (for order 23144).

2. Information for Requisition 23144 is displayed. Note that even though this appears to look like a standard requisition, there are some differences. You can't add anything to this order nor can you change any of the entered information.
3. Also note the Action Buttons in the Shopping Cart. You can only Print the information or click to start a new order.

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Copy an Order:

1. To copy from an existing order, click the Copy Button next to the order you want to duplicate. The Copy mode allows you to duplicate all or part of an existing order. Once created, you may perform additional actions on the order prior to releasing.

2. Click the Check All Button and then click the Copy Button.

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3. RQC creates a new order (23149) that is identical to 23146.
4. At this point, the Requester can click Release to process the order, they can click New to save it or they can click the Find / Shop option to select additional items off of their Template List.

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Exiting RQC:

On the RQC Header, locate the Logout link at the top right and click it. You can also exit RQC by clicking the red X box in the upper right hand corner.