

The Purchasing department provides services to the following entities: 1) Stanford Health Care; 2) University HealthCare Alliance; 3) Stanford Blood Center, LLC; 4) Lucile Salter Packard Children's Hospital at Stanford ("Lucile Packard Children's Hospital" or "Stanford Children's Health"); 5) Packard Children's Health Alliance; and 6) The Hospital Committee for the Livermore-Pleasanton Areas ("Stanford Health Care - ValleyCare").

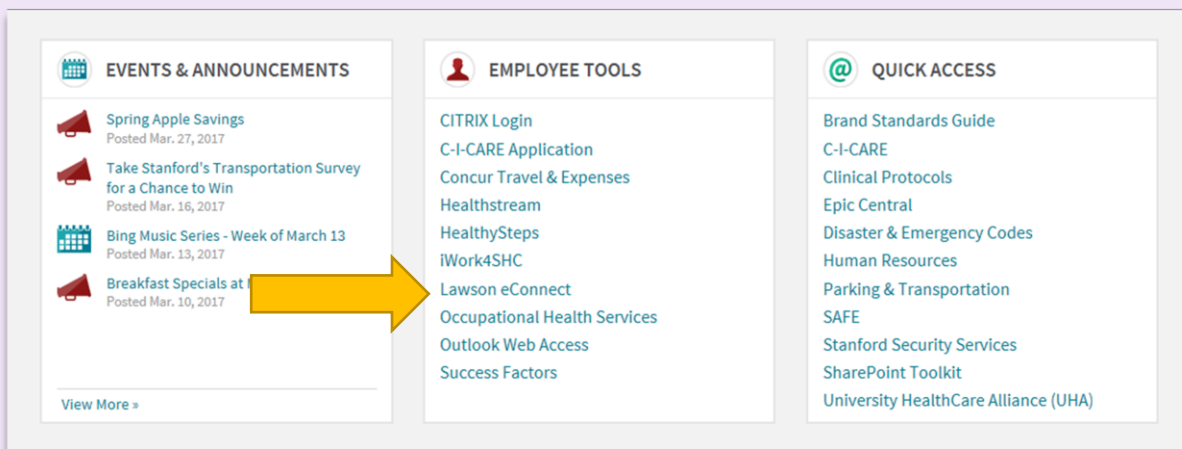
TRAINING GUIDE – Requesting Purchase Orders for Goods in Infor Lawson

Description: The Purchasing department utilizes an online system called "Infor Lawson" to create Purchase Orders for the following Stanford entities: 1) Stanford Health Care, 2) The Hospital Committee for the Livermore-Pleasanton Areas ("Stanford Health Care - ValleyCare"), 3) University HealthCare Alliance, and 4) Stanford Blood Center, LLC. Follow the steps outlined below to request a Purchase Order for goods.

1. Navigate to Infor Lawson

- a. From the SHC Connect intranet home page, select "Lawson eConnect" from the "EMPLOYEE TOOLS" section as depicted below or click the following link:

<https://infor.stanfordmed.org/sitepages/inforsuite.aspx>.

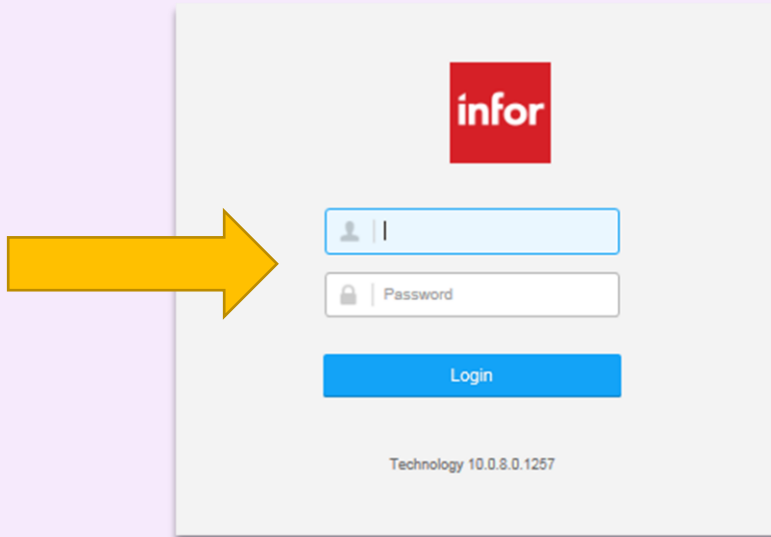


The screenshot shows a grid of three main sections: 'EVENTS & ANNOUNCEMENTS', 'EMPLOYEE TOOLS', and 'QUICK ACCESS'. The 'EMPLOYEE TOOLS' section contains a list of links, with 'Lawson eConnect' highlighted by a yellow arrow pointing to it from the left.

EVENTS & ANNOUNCEMENTS	EMPLOYEE TOOLS	QUICK ACCESS
<ul style="list-style-type: none"> Spring Apple Savings Posted Mar. 27, 2017 Take Stanford's Transportation Survey for a Chance to Win Posted Mar. 16, 2017 Bing Music Series - Week of March 13 Posted Mar. 13, 2017 Breakfast Specials at... Posted Mar. 10, 2017 	<ul style="list-style-type: none"> CITRIX Login C-I-CARE Application Concur Travel & Expenses Healthstream HealthySteps iWork4SHC Lawson eConnect Occupational Health Services Outlook Web Access Success Factors 	<ul style="list-style-type: none"> Brand Standards Guide C-I-CARE Clinical Protocols Epic Central Disaster & Emergency Codes Human Resources Parking & Transportation SAFE Stanford Security Services SharePoint Toolkit University HealthCare Alliance (UHA)

2. Log in to Infor Lawson

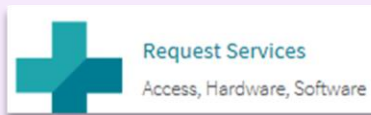
- a. Log in to Infor Lawson using your Stanford ID (SID) and Password.



- b. Infor Lawson requires special access, which can be obtained by following the steps below:
- From the SHC Connect intranet home page, click on "ORGANIZATION" and then click on "Digital Solutions".

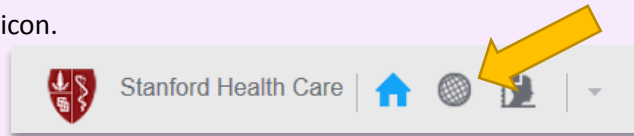


- Click the "Request Services" tile and submit a request for "Requisition Rights in Infor Lawson".

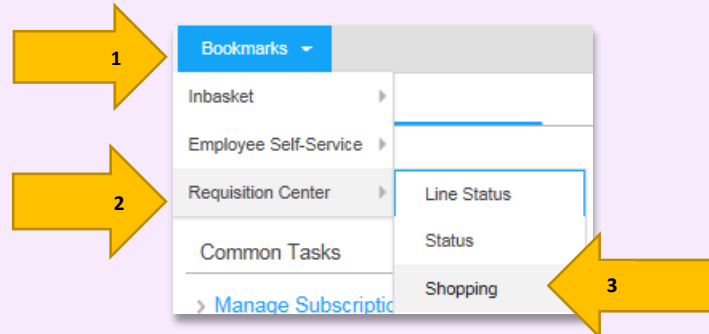


3. Navigate to the Infor Lawson "Requisition Center"

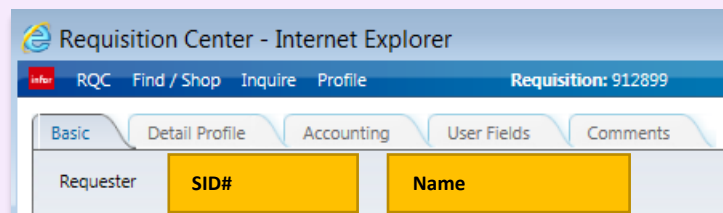
- a. Click on the "Globe" icon.



- b. Select "Bookmarks", "Requisition Center", and then "Shopping".



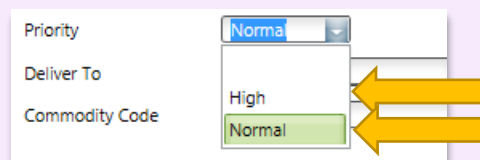
- c. The "Basic" tab will pop up and your default profile will appear for you to validate your information.



- d. Select the applicable date the goods should be delivered in the "Requested Delivery Date" box.



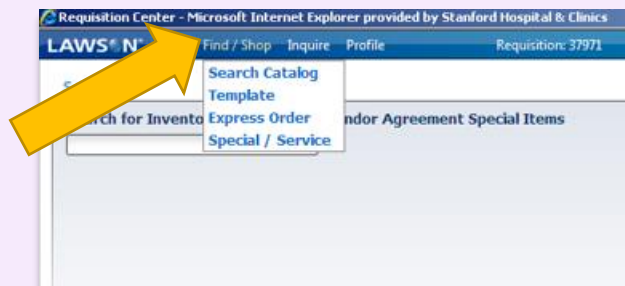
- e. Select either "Normal" or "High" in the "Priority" box using the drop-down list:



- i. "Normal" means that the request will be processed within 24 hours.
- ii. "High" means that the request will be processed overnight or within the same day, if the request is entered before 12:00 p.m.

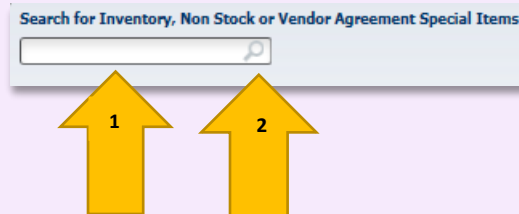
4. Request a Purchase Order for Goods

- a. There are three different ways to request a Purchase Order for goods.
 - i. **Search Catalog:** use this option to search for items by item number (you can find item numbers in Google, searching by item name, e.g., “gloves item number”) or vendor catalog number (you can find this number in the quote provided by the vendor) or by description (e.g., band aid).
 - ii. **Express Order:** use this option to search for items by Infor Lawson item number.
 - iii. **Special / Services:** use this option to search for items without Infor Lawson numbers, when the item is not in any Catalog and it’s not possible to search for the item using the “Search Catalog” option.

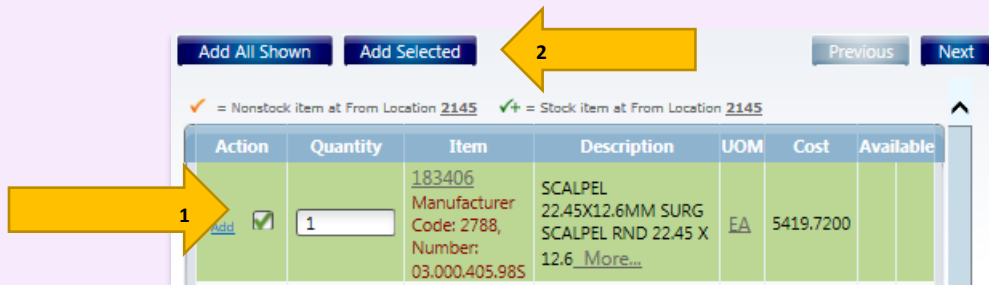


4.i. Request a Purchase Order for Goods Using the “Search Catalog” Option

- a. After clicking on “Search Catalog” from the “Find / Shop” navigation box at the top of the screen, in the “Search for Inventory, Non-Stock or Vendor Agreement Special Items” dialogue box, type either the item number, the catalog number, or the description of the good to order; then press “Enter” or click on the magnifying symbol.



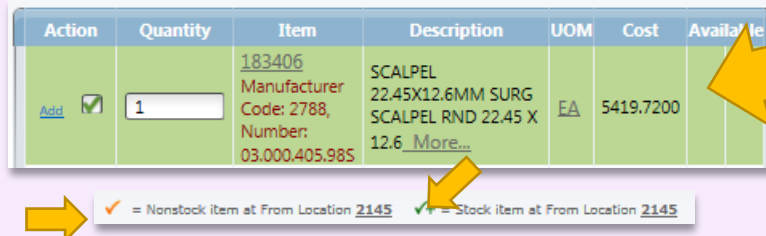
- b. Add the item by checking the “Add” box and then clicking on “Add Selected”.



- c. Click the blue “Release” button at the bottom right of the screen to submit the request.

Release

NOTE 1: For departments which have an inventory (e.g., Surgical Materials and Supply Distribution, etc.), “Nonstock” items cannot be combined with “Stock” items. Create separate Purchase Order requisitions for “Nonstock” items and “Stock” items. In order to determine whether items are “Nonstock” items or “Stocks” items, a check mark appears at the right of the item line:



- i. a “green” check mark signals that the requested item is a “Stock item”: the item is available in the inventory of the department (e.g., Location 2145, etc.);
- ii. an “orange” check mark signals that the requested item is a “Nonstock” item: the item is not available in the inventory of the department (e.g., Location 2145, etc.).

NOTE 2: Click on the “Clear” button, at the bottom right of the screen, in order to clear the request and start over to select different items.

Clear

4.ii. Request a Purchase Order for Goods Using the “Express Order” Option

- a. After clicking on “Express Order” from the “Find / Shop” navigation box at the top of the screen, in the “Search for and Add a known item to the requisition” dialogue box, input the Infor Lawson Item Number; then click on “Find” and the item description will appear:

Express Order

Search for and Add a known item to the requisition.

Item

- b. Update the “Quantity” box to enter the desired quantity of the item and then click on “Add”.

Item

Description CATH NEPHRO 24FR MALECOT
DRN MLCT NPHROSTMY DRNG 24FR

Quantity

UOM CA

Entry Code Item

- c. Click the blue “Release” button at the bottom right of the screen to submit the request.

4.iii. Request a Purchase Order for Goods Using the “Special / Service Order” Option

- a. If an item cannot be located in the “Search Catalog” database, after clicking on “Special / Service” from the “Find / Shop” navigation box at the top of the screen, fill out all of the following fields:

1 Add → Item BAND AID
2 → Description band aid

1. This is the Vendor catalog number or part number (this number is located in the Vendor Quote).

2. This is the description of the item (e.g., gloves, stretchers).

3 → Item Type Special
Quantity Special
UOM Amount Service
Cost Quantity Service

3. Select “Special”. Don’t use “Amount Service” or “Quantity Service”.

4. This is the desired quantity of the item to order.

4 → Quantity 1
5 → UOM
6 → Cost
7 → Cost Default Vendor

5. This is the “Unit Of Measure”. Click on the arrow at the right of the box and select the unit of measure (e.g., box, case, pack).

8 → Accounting Unit 84004

6. This is the price that was quoted from the Vendor. Requestors should obtain a price prior to keying in a special order.

7. This is the Vendor Name. Click on the arrow to the right of the box and select the applicable option. NOTE: ALWAYS change the vendor name if the requested Purchase Order is for multiple different special items.

[Active Vendors By Name](#)
[Active Vendors By Number](#)
[Active Vendors By Class](#)
[PO Vendors By Number](#)
[PO Add Inactive Vendors](#)

8. This is the General Ledger number: click on the arrow at the right, select the applicable option:


[Active Detail Accounts](#)
[Chart of Accounts](#)
[Active Accounts For Req Company](#)

Then choose the General Ledger number, e.g., 541000 Medical/Surgical supply).




9 → Taxable No
Tax Code

9. If the item is Taxable, select “Yes”.

4.iii. Request a Purchase Order for Goods Using the “Special / Service Order” Option - Continued





- b. Click on , at the top left of the screen, and the items will move to the right, in the “Requisition Lines” window:

Requisition Lines

	Item	Quantity	Cost
	<u>1820</u> CATH NEPHRO 24FR MALECOT	1 <u>CA</u>	59.7600 USD 59.7600
	<u>7631</u> SCREW BONE 2MM 3.5MM 14MM DCP	1 <u>EA</u>	33.0200 USD 33.0200
	<u>168</u> BANDAID SHEER SPOT 7/8	1 <u>BX</u>	2.0447 USD 2.0447

- c. At the bottom right of the screen, you will see a small chart showing the “Total Quantity”, “Total Cost” and “Number of Lines”.

Total Quantity:	2
Total Cost:	35.06 USD
Number of Lines:	2

- d. Then the following options are available:
- “New”** - Create a new requisition.
 - “Clear”** - Clear all the items you have in the requisition.
 - “Print”** - Print the requisition.
 - “Release”** - Submit the requisition for approval.

For additional assistance, please email Purchasing@stanfordhealthcare.org.