

Hillsborough County Public Schools

Lawson

Excel Template Manual for Library Purchases

Revised Summer 2020

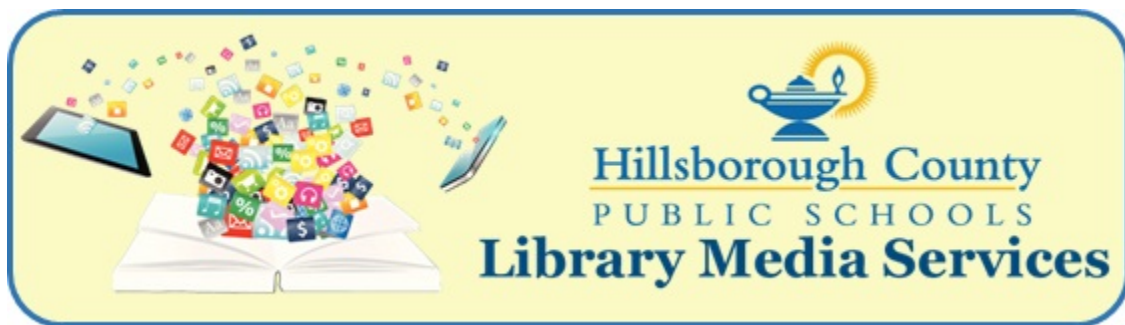


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Lawson TEMPLATE Q & A

What is the Lawson Excel Template?

The Lawson Excel Template is a specially designed template that can be used to create title lists for books and AV materials that can be uploaded into Lawson to create purchase orders. Hillsborough County Public Schools has designed a Lawson Excel template to make it easier to create book and AV materials orders for libraries within the Lawson enterprise resource program.

How can vendors work with the district to make this process easier?

Vendors may choose to fill out the vendor portions of the template for the media specialists or opt to make the template work with an Excel Export from the vendor's web catalog.

What does a vendor need to do?

Vendors enter the required data into columns A-H of the template (details on the following pages), then provides the template to media specialists for them to complete the template and submit the order to Library Technical Services. The order is then uploaded to by the Library Technical Services department within Lawson enterprise resource program and a purchase order it sent to the vendor.

What are the advantages of using the template instead of entering data directly into Lawson?

Lawson does not allow for the use of attached lists. Therefore, each title must be entered in to Lawson as a line item. Vendors, which agree to provide this service, may enter titles for you or you may enter the titles yourself. Entering titles on the template takes significantly less time for the media specialist than entering individual titles into Lawson line by line.

What do I do if I damage my template?

You can download a copy of the RQ10 Requisition for Library Template from IDEAS. Log on to IDEAS and then open the Media Specialists folder on the IDEAS desktop. Next, open the Excel Lawson Template folder. The file and a copy of this manual will be inside the folder for you to download.

Preparing a Template

The Lawson Excel template contains column headings in row 1 which MUST NOT be changed or deleted. Vendors will be responsible for completing columns A-H. Media specialist are responsible for columns I- O.

Completing the Vendor Portion of the Template

Entering Data: Vendors enter data in Columns A-H (pink columns)

- Column A School Name
- Column B Vendor Name
- Column C Title (1 title per cell in alpha order)

C
TITLE (MUST BE LISTED WITHOUT PUNCTUATION)
Shipping
Amulet Book eight
Processing

Shipping Charges

If the vendor charges for shipping, the charges must be entered as the first line item on your template.

Processing Charges

If the vendor charges for processing, the charges must be entered as the last line item on your template.

- Column D Quantity
- Column E Unit of Measure

D	E
Quantity	Unit of Measure
1	EA
2	EA
1	EA

Unit of Measure Codes & Descriptions

The unit of measure must be only 2 letters & must be in caps.

- EA Each Use EA for individual book titles
- ST Set Use ST for titles that can only be ordered in sets.
Examples: encyclopedias

- Column F Unit Cost
- Column G Item Type

F	G
Unit cost	Item Type (Library Books, Videos, etc.)
20.00	Shipping Charges
28.00	Library Book
14.00	Library Book
2.00	Processing Charges

Shipping Charges – Use for freight charges

Library Books – Use for library books

Videos – Use for Videos and DVDs

Sound Recordings – Use for audio books & music CDs

Ebooks – Use for ebooks

Processing Charges – Use for processing charges

- Column H Vendor Item# or ISBN#

H
Vendor Item # or ISBN #
01
978-1338299175
978-0439064866

Enter the Vendor Item Number or the ISBN # for each title.

Completing the Media Specialist Portion of the Template

Entering Data: Media Specialists enter date into Columns I-O (aqua columns) Media Specialists only need to enter date into the cells highlighted yellow. Cells do not need to be pulled down.

Column I Processing Code – Mandatory

Processing Code - Mandatory
LIB8

The media specialist enters a processing code into the yellow cell of Column I that has a book or video title listed. This is a Mandatory field for the requisition so the data MUST be entered. There are 17 different processing codes. Use the processing codes listed below to determine which code to enter for your order.

Code	Description
LIB1	Process as per HCPS specifications (specs)
LIB1G	Process as per HCPS specs + genre
LIB2	Process as per HCPS specs + mylar covers
LIB2G	Process as per HCPS specs + genre, mylar covers
LIB3	Process as per HCPS specs + mylar covers, security.
LIB3G	Process as per HCPS specs + genre, mylar covers, security
LIB4	Process as per HCPS specs + security
LIB4G	Process as per HCPS specs + genre, security
LIB5	Special Order – No Processing
LIB6	Process as per HCPS specs + school name, barcode number
LIB6G	Process as per HCPS specs + genre, school name, barcode number
LIB7	Process as per HCPS specs + school name, barcode number, security
LIB7G	Process as per HCPS specs + genre, school name, barcode number, security
LIB8	Process as per HCPS specs + mylar covers, school name, barcode number
LIB8G	Process as per HCPS specs + genre, mylar covers, school name, barcode number
LIB9	Process as per HCPS specs + mylar covers, school name, barcode number, security
LIB9G	Process as per HCPS specs + genre, mylar covers, school name, barcode number, security

Columns J-O are Budget Codes & indicate what funds are being used for the order

Column J	Fund (3-digit number) also referred to as Company in the Lawson System
Column K	Site (4-digit number) school site number
Column L	Project (4-digit number)
Column M	Program (3-digit number)
Column N	Function (4-digit number)
Column O	Object (3-digit number)

J	K	L	M	N	O
Fund	Site #	Project	Program	Function	Object
101	2561	4505	610	6200	610

Remaining Columns (gray columns) should not be edited

Column P	Cost Z (auto-populated)
Column Q	Total Cost (auto-populated)
Column R	Assigned by Lawson

P	Q	R
Cost	Total Cost	Assigned by Lawson
12.74	102.66	
22.48		

Directions for Sending Completed Templates to Library Technical Services

Naming Template

Templates **MUST** be named using the following nomenclature formula:

SchoolName-VendorName-Date

Example: Alafia-Follett-2-16-19



The image shows a standard Windows file save dialog box. The 'File name' field is populated with 'Alafia-Follett-2-16-04'. Below it, the 'Save as type' dropdown menu is open, showing 'Microsoft Excel Workbook' selected. To the right of the text boxes are two buttons: 'Save' and 'Cancel'.

Every file should be given a unique name. If you create two order lists for the same vendor on the same date, you should add a letter at the end of the date.

Example: Alafia Follett 2-16-19 and Alafia Follett 2-16-19A

Sending Template

Email templates as attachments to Library Template, a special IDEAS account specifically for Library Lawson template orders. Template orders cannot be submitted to the personal email addresses of any Library Technical Services staff members.

Directions for Sending Attached Files

1. Log in to IDEAS.
2. Click on your mail box to open it.
3. Click New Message
 - a. Subject: SchoolName Order (ex. Alafia Order)
 - b. To: Library Template
4. Click Attach button
 - a. Navigate to & click on the name of the file and then click open
5. Include the following information in the body of your message.
 - a. See attached (Vendor Name) order for (School Name)
Example: See attached Follett order for Alafia Elementary
 - b. Special instructions for the vendor that need to be printed on the purchase order.
Examples: Send free or bonus items with order
Sunshine State Books, Battle Books, other special books
Include free AR or RC tabs with order
Special Deadlines or Special pricing Information
6. Press the Send button or icon

Sample Completed Lawson Excel Template

School Name	Vendor Name	TITLE (MUST BE LISTED WITHOUT PUNCTUATION)	Quantity
Library Technical	Follett	Dry	1
		Undivided	2
		UnSouled	2
		UnWholly	2
		Unwind	2
		Processing Charges	1

Unit cost	Item Type (Library Books, Videos, etc.)	Vendor Item # or ISBN #	Processing Code - Mandatory
12.74	Book	32380Q0-46110597	LIB8
11.24	Book	0555QYX-46110597	
11.24	Book	0591LS0-46110597	
11.24	Book	0805LK5-46110597	
11.24	Book	04995W3-46110597	
0.00	Processing Charges		

Fund	Site #	Project	Program	Function	Object	Cost	Total Cost
101	9360	4505	610	6200	610	12.74	102.66
						22.48	
						22.48	
						22.48	
						22.48	
						0.00	