

Materials Management - Purchase Requisitions

The University of Mississippi
End User Documentation – 4.6C

3/2009

E-Mail: sap@olemiss.edu

SAP Support: 662.915.5222

R/3 Path	Logistics > Materials Management > Purchasing > Purchase Requisition > Create [double-click]
Transaction Code	ME51N
NOTE:	Once you have accessed and created a requisition, the defaults screen will change. You will probably want to close Enjoy SAP – Purchase Requisition box to the left and also the document overview. The first time you may also have to select Document Type – Purchase Requisition.
Expand Screen	Expand Header, Item Overview and Item details - Left-click on the Expand Icons for each area.
Account Assignment Category	Use K for funds 10, 20, 40, 50, 70. Use F for 25, 30, 60, 61, 62, and 63. Use M for Multiple Assignments.
Material	PPD & Telecommunications ONLY.
Short Text	Type short description of item to be ordered.
NOTE:	You will have an opportunity for additional text later.
Quantity	Enter quantity requested.
NOTE:	Unit and Unit price determines the amount of money encumbered. So be careful – if you are ordering in thousands, use TH, not each.
Delivery date	Try to be as accurate as possible. You may type in date or use search button and use the SAP calendar.
NOTE:	You may receive a message from SAP asking if the delivery date can be met, if yes press enter or click on green check.
Material group	Use the search button and select the appropriate material group.
Plant	OXO1 – The University of Mississippi, this should default.
Storage location	Type in DC01 or use search button and select DC01. (Departments that have been authorized to issue good receipts are listed – however, <u>ALL EQUIPMENT</u> must be delivered to DC01).
Purchasing Group	Always select PUR (for typical End-User)
NOTE:	Buying departments should always select PUR for purchases over

	\$3,500 and for all equipment.
Requisitioner	Enter initials and extension of the person entering the purchasing requisition information.
Tracking number	Departments may use this field to help keep track of orders, code with your individual needs.
Des. vendor	If you know the vendor you wish to use, use the drop down box and select appropriate vendor.
Note:	Remember to use * as a wild card in helping with your search. When looking up vendor information, make sure tab is on A: Vendor (General). Vendors for Requisitions should always begin with 65 – <u>do not</u> use numbers beginning with 75.
Enter	Press enter or left click on green check.
Unloading point	To be used by Central Receiving – where are items to be delivered? Building and Room number.
Recipient	Person item to be delivered to (end user) and four-digit extension that will be used by Central Receiving.
G/L account	Enter G/L account (http://www.olemiss.edu/projects/discover/Accounting_index.html).
Cost Center or Order	Enter Cost Center or Internal Order number.
NOTE:	BA (Business Area), Fund Center and Fund should default when you press enter.
Enter	When all required items are complete on this page, press enter or left click on green check.
Single account assignment	Single account assignment is the default – if you wish to charge to different cost center/internal orders, see page 14.
Val price	Enter Unit Price (cost PER ITEM) – If you verify the price – make sure to include in notes to Purchasing or Purchasing will quote.
Goods receipt	This indicates that a good receipt must be processed before payment can be made to vendor. (Should default)
Invoice receipt	This indicated that an invoice must be processed before payment can be made to vendor. (Should default)
GR non- valuated	<u>Only</u> for multiple accounts. If you are using multiple accounts (cost centers/internal orders), this box must be checked.
Item text	Will appear on PO – Item text should be used for any additional information that should be included on the Purchase Order. Example: If more data is needed than short text will permit.
NOTE:	Do not put prices or vendor name and address in Item Text.

Item notes	Will not appear on PO – This field should be used for note to Purchasing, departmental information, etc. – this information will not appear on the Purchase Order.
NOTE:	If you need more space, double-click in Item text/note field.
SAVE	Save document – you should receive a notification that your requisition was created and you should be given a requisition number at the bottom of your screen.
Purchase Order	Purchasing Office will now take your requisition and either go out for bids, quotes, or turn into a Purchase Order.

Repeat account assignment	If you wish to repeat account assignment, left click on “Repeat On’ icon. You will need to enter the account assignment category for each line item. See page 11.
Multiple Assignment	See page 14.
Copy an Old Requisition	See page 16.

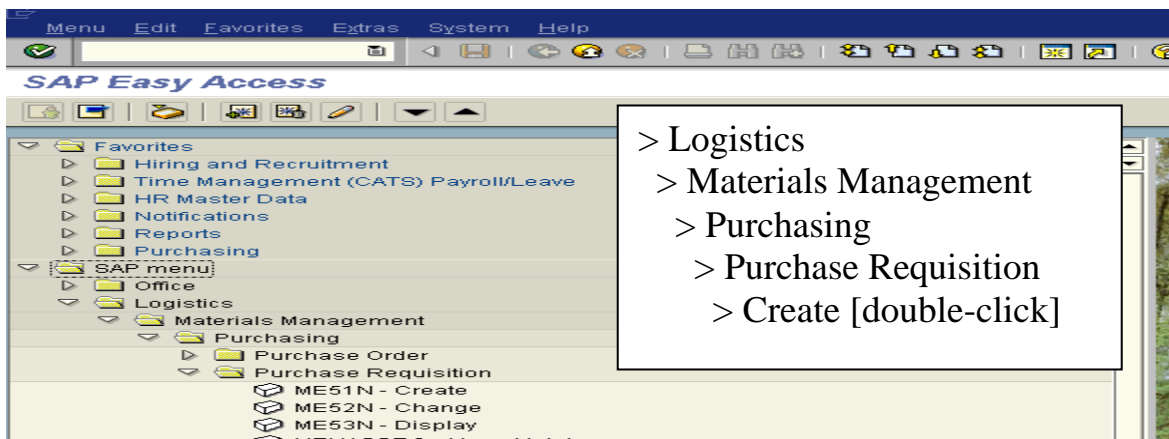
Materials Management - Purchase Requisitions

SAP Screen Shots
The University of Mississippi
End User Documentation – 4.6C
3/2009

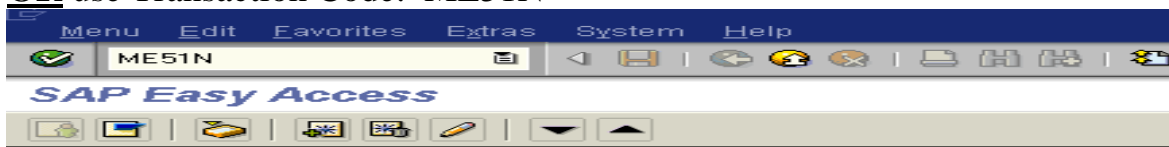
SAP Support: 662.915.5556
E-Mail: sap@olemiss.edu

SAP Web Site
www.olemiss.edu/projects/sap

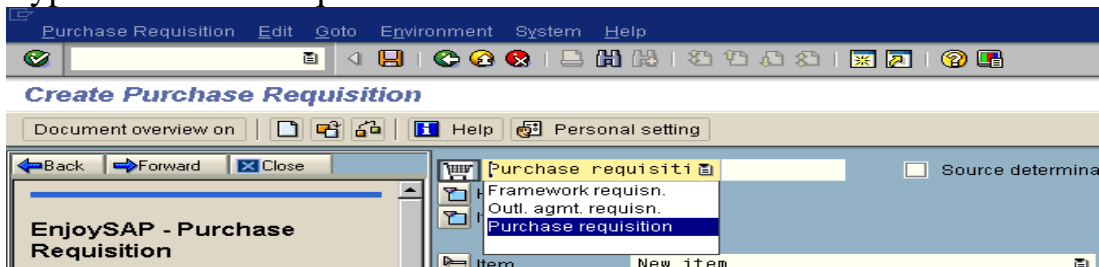
SAP Menu Path: Logistics > Materials Management > Purchasing > Purchase Requisition > Create [double-click]



OR use Transaction Code: ME51N

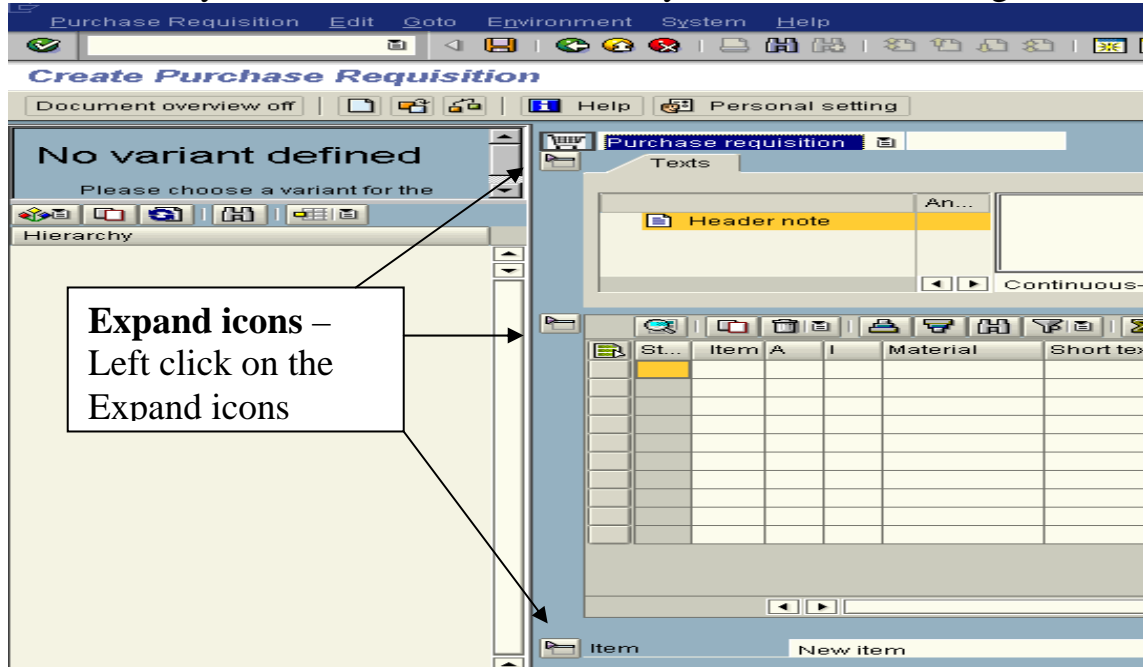


Default Create Purchase Requisition Screen – Once you have accessed and created a requisition, the defaults will change. You will probably want to close Enjoy SAP – Purchase Requisition box to the left and also the document overview. The first time you may also have to select Document Type – Purchase Requisition.

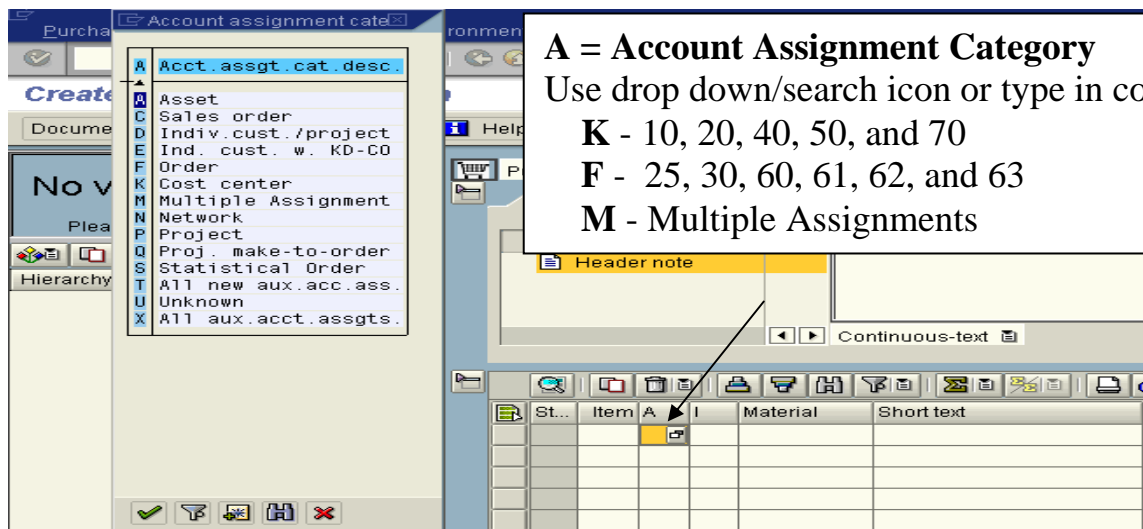


Expand Header, Item overview and Item details – Left click on the Expand Icons for each area.

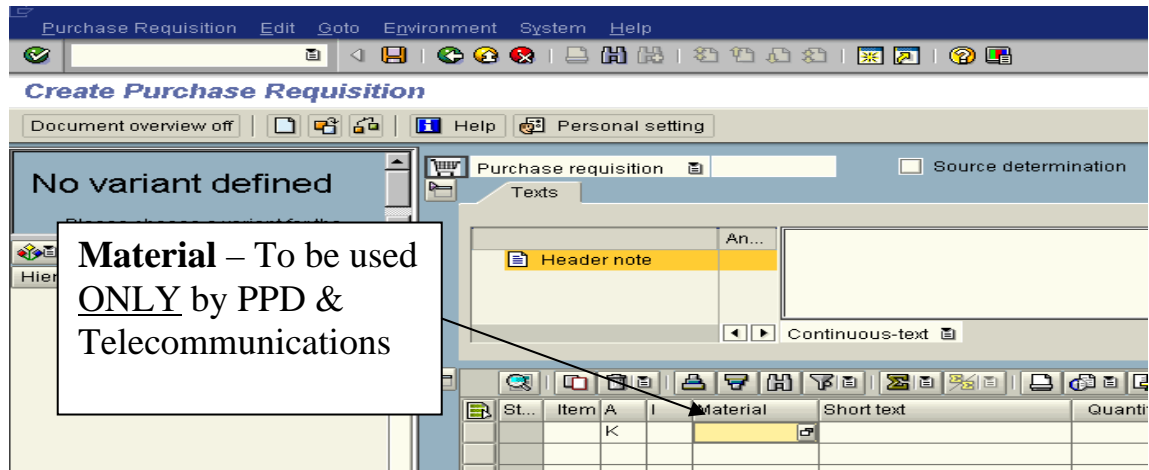
Note: Once you have accessed this screen, your default will change.



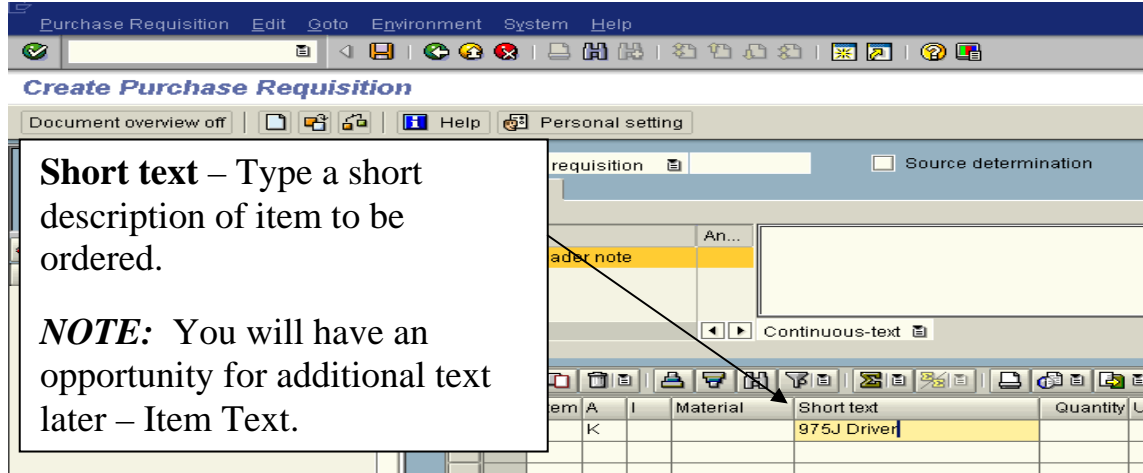
A = Account assignment –
 Use **K** for funds 10, 20, 40, 50, and 70
 Use **F** for 25, 30, 60, 61, 62, and 63
 Use **M** for Multiple Assignments



Material – PPD & Telecommunications ONLY.



Short text - Type description of item to be ordered. If additional space is needed, you will have a chance later to add long text by selecting the Item Text. **Note:** It is best to be as detailed as possible. If you are typing from a quote, type all of the description - this is what will appear on the Purchase Order. No longer will you be able to type “see attached”.



Quantity - Enter quantity requested.

Unit – this is VERY IMPORTANT. For Unit, use the drop down box and select the appropriate unit type. **NOTE:** If you are ordering in thousands, you must use the TH, not each.

Quantity – Enter quantity requested 1

UN = Unit - Use drop down/search icon or type in code. 2

Commercial	Un	Measurement unit text	Dimension text
%	%	Percentage	Proportion
%0	%0	Per mille	Proportion
000	000	Voltampere	Power
001	001	Microgram/liter	Density
002	002	Microgram/cubic meter	Density
22S	22S	Square millimeter/second	Kinematic viscosity
A	A	Ampere	electr. curr.
ACR	ACR	Acre	Area
BAG	BAG	Bag	(no dimensions)
BAR	BAR	bar	Pressure
BOT	BOT	Bottle	(no dimensions)
BQL	BQL	Becquerel/kilogram	Spec.act.radioac.sub
C3S	C3S	Cubic centimeter/second	Volume rate of flow
CAN	CAN	Canister	(no dimensions)
CD	CD	Candela	Luminous intensity
CL	CL	Centiliter	Volume
CM	CM	Centimeter	Length
CM2	CM2	Square centimeter	Area
CM3	CM3	Cubic centimeter	Volume
CMH	CMH	Centimeter/hour	Speed
CMS	CMS	Centimeter/Second	Speed
CR	CR	Crate	(no dimensions)
CS	CS	Case	(no dimensions)
CT	CT	Carton	(no dimensions)
D	D	Days	Time
DAY	DAY	Days	Time
DEG	DEG	Degree	(no dimensions)
DM	DM	Decimeter	Length
DM3	DM3	Cubic decimeter	Volume
DRM	DRM	Drum	(no dimensions)
DZN	DZN	Dozen	(no dimensions)
EA	EA	Each	(no dimensions)

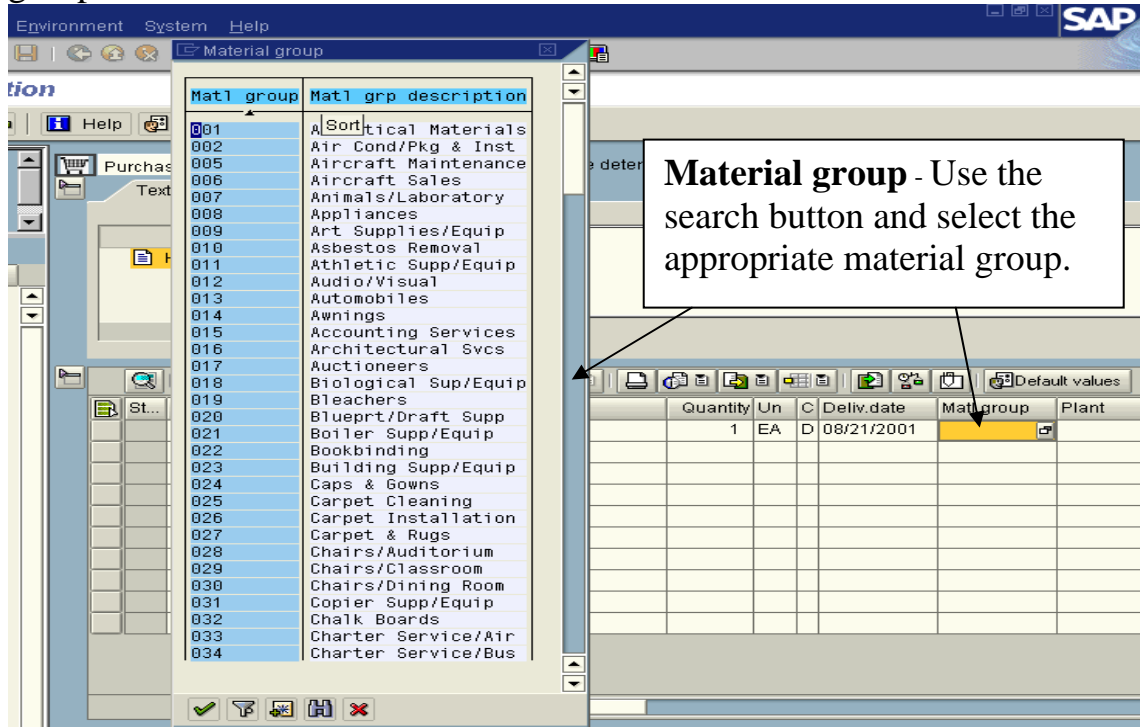
Quantity	Un	C	Deliv.date
1	EA		

Delivery date - try to be as accurate as possible. Also, you may be asked if Delivery date can be met if the date is close to present date, press enter. You may type in date or use drop down box to bring up a calendar.

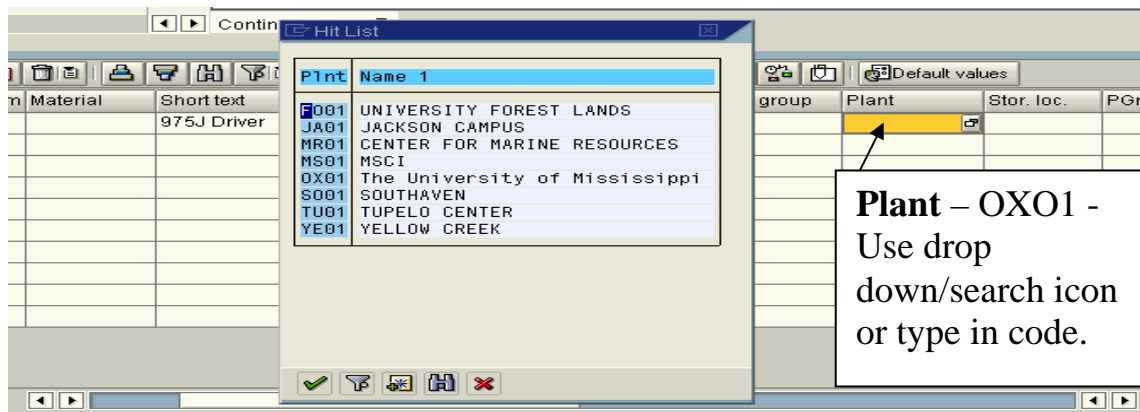
Delivery Date – Use drop down/search icon to bring up calendar or type in date

St...	Item	A	I	Material	Quantity	Un	C	Deliv.date	Matl group	Plant
	K				1	EA				

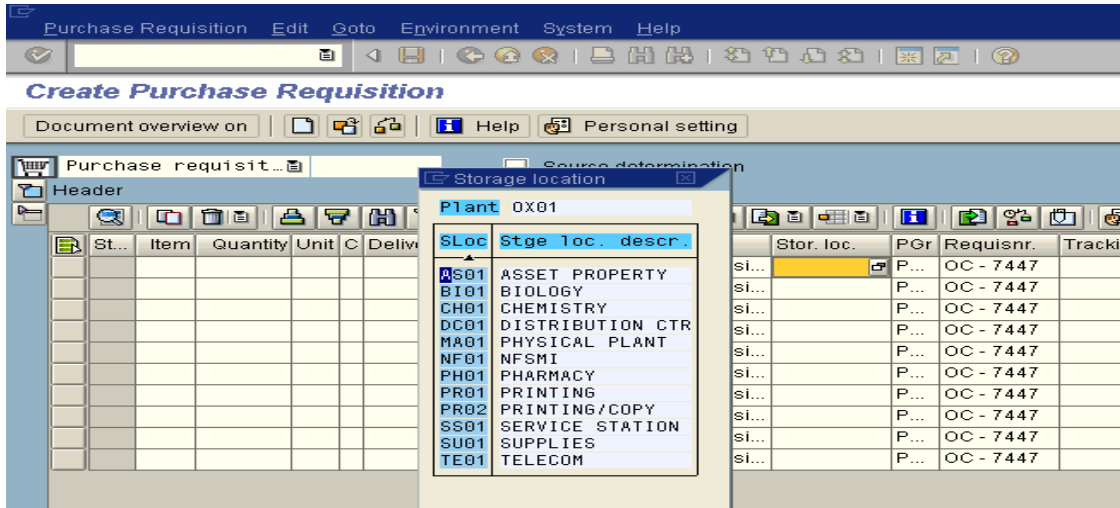
Material group - Use the search button and select the appropriate material group.



Plant – OXO1 – The University of Mississippi – Should be defaulted.



Storage Location – Select DC01. Departments that have been authorized to issue good receipts are listed. However, ALL EQUIPMENT must be delivered to DC01.



PGr - Purchasing group – ALWAYS SELECT PUR (For typical End-User)

PP1	Vicki Martin	662-915-7051	662-915-5744
PP2	Kathy Groves	662-915-7051	662-915-5744
PP3	Kathy Watson	662-915-7051	662-915-5744
PP4	Phyllis Holmes	662-915-7051	662-915-5744
PP5	Gerald Bishop	662-915-7051	662-915-5744
PP6	Russell Finley	662-915-7051	662-915-5744
PP7	Greg Bounds	662-915-7051	662-915-5744
PP8	Rachel Bost	662-915-7051	662-915-5744
PR1	Mary Card	662-915-7066	662-915-7419
PU1	Jim Windham	662-915-7448	662-915-7752
PU2	Betty Zinn	662-915-7448	662-915-7752
PU3	Belinda Redmond	662-915-7448	662-915-7752
PU4	Cathy Laswell	662-915-7448	662-915-7752
PU5	Shelley Morrison	662-915-7448	662-915-7752
PU6	Loretta Naron	662-915-7448	662-915-7752
PUR	Purchasing Dept.	662-915-7448	662-915-7752
TE1	Ann Boyd	662-915-5922	662-915-7010

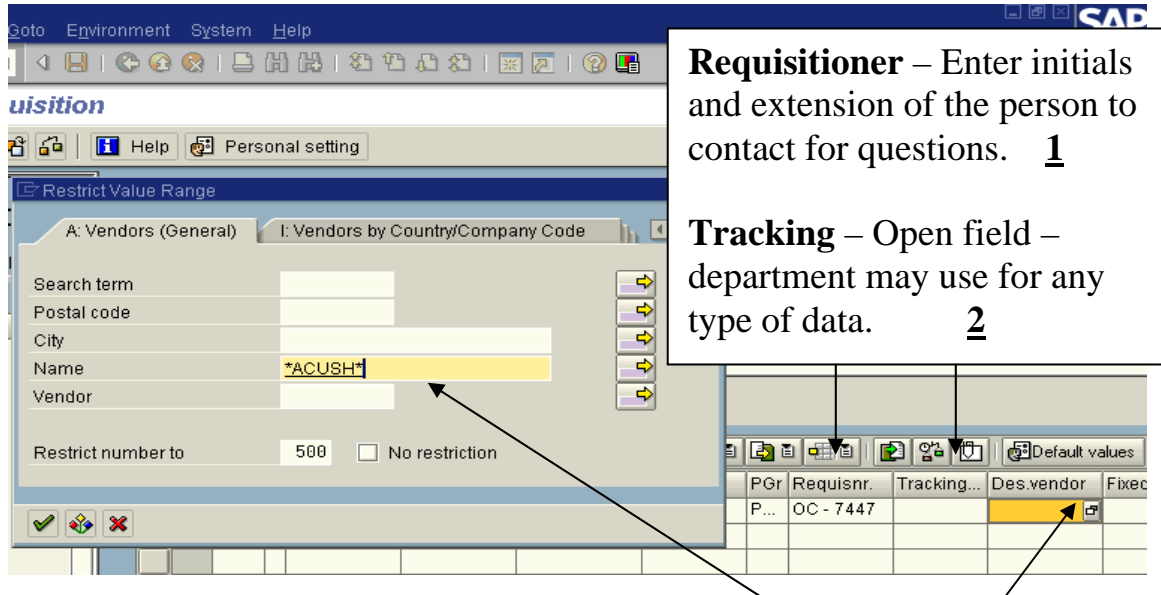
The screenshot shows the 'Purchasing group' (PGr) dropdown menu in the SAP 'Create Purchase Requisition' dialog box. The 'PUR' option is selected. The background shows a table with columns for 'Plant', 'Stor. loc.', 'PGr', and 'Requis...'. The 'Plant' field is set to OX01.

Requisitioner - Enter initials and extension of the person entering the purchasing requisition information.

Tracking - Departments may use this field to help keep track of orders, code with your individual needs.

Des. Vendor – If you know the vendor you wish to use, use the drop down box and select appropriate vendor.

Note: Remember to use * as a wild card in helping with your search. Vendors for Requisitions should always begin with 65 – do not use numbers beginning with 75.



Des. Vendor – If you know the vendor you wish to use, use the drop down box and select appropriate vendor. 3

Note: When looking up vendor information, make sure tab is on A: Vendors (General).

When all required items are complete, press enter or left click on green check. The next page Account assignment should appear.

Enter – Press enter on keyboard or left click on Enter Icon.

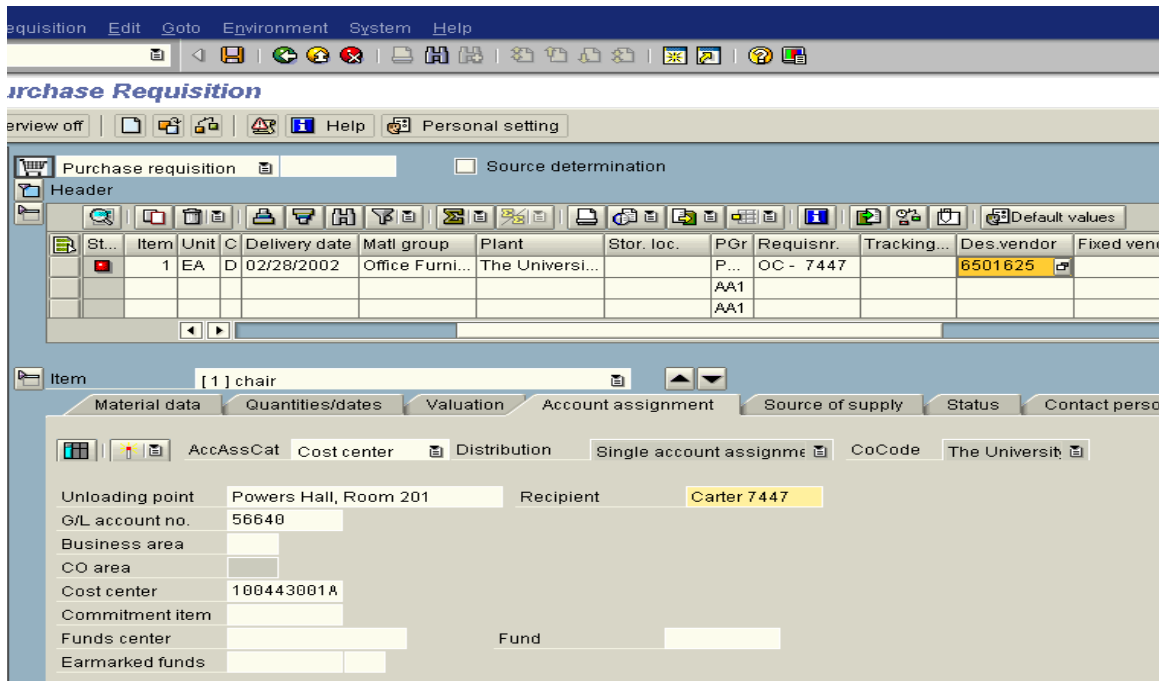
Unloading point – Enter where the items are to be delivered by Central Receiving.

Recipient – Person item to be delivered to (end user) and four-digit extension that will be used by Central Receiving.

G/L account – Enter G/L account
(<http://www.olemiss.edu/projects/discover/glcodes.htm>).

Cost center – Enter Cost Center or Internal Order (Old Term Account Number)

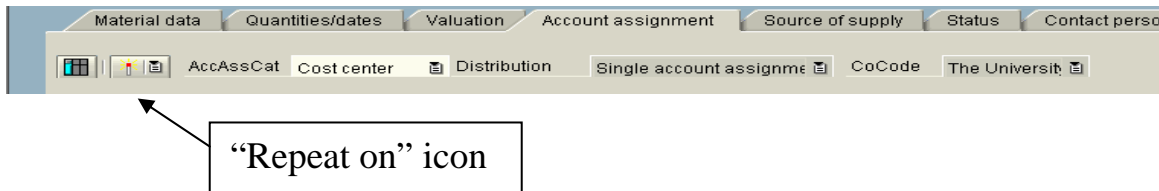
NOTE: BA (Business Area), Fund Center and Fund should default when you press enter.



Enter – When all required items are complete, press enter or left click on green check.

Single account assignment – Single account assignment is the default – if you wish to charge to different cost center/internal order, see page 14.

Note: If you wish to repeat account assignment, left click on “Repeat On” icon. You will need to enter the account assignment category for each line item.



Internal Order Screen: Example of Screen (If you selected F for Account Assignment Category)

purchase requisition

Valuation Price – Enter Unit Price (cost PER ITEM) – If you verify the price – make sure to include in notes to Purchasing or Purchasing will quote.

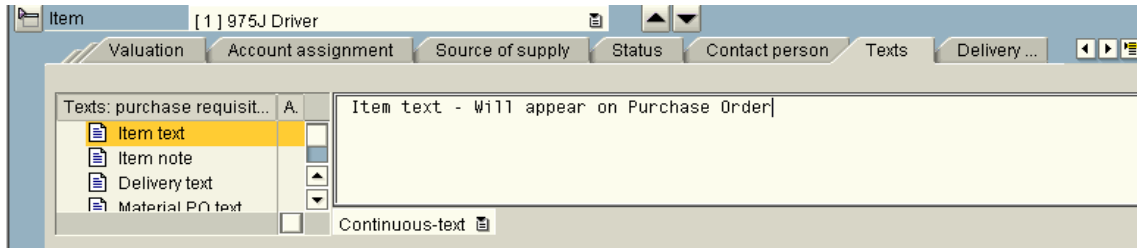
Goods receipt – This indicates that a goods receipt must be processed before payment can be made to vendor.

Invoice receipt – This indicates that an invoice must be processed before payment can be made to vendor.

GR non-val – Only for multiple accounts - If you are using multiple accounts (cost center/internal orders), this box must be checked.

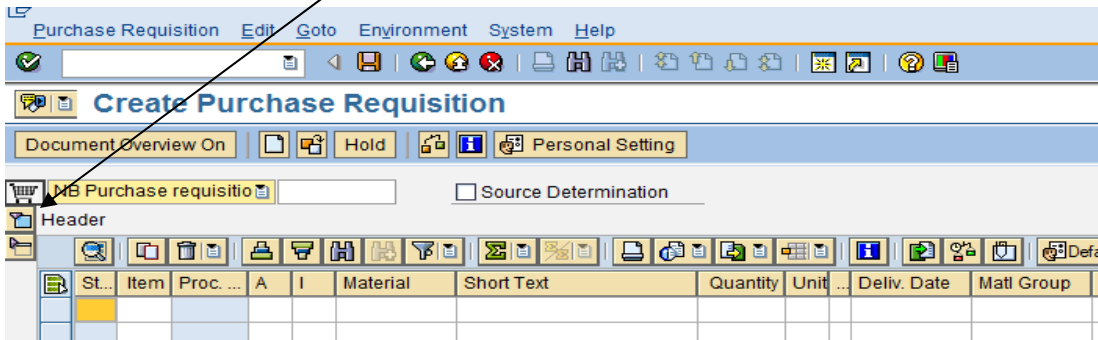
Texts – Click on the Texts Folder Tab - If you need more space, double-click in Item text/note field.

Item text will appear on your purchase order. Do not include information not needed by vendor. Use this text field to include items such as model numbers, color, sizes, etc. (DO NOT PUT PRICES OR VENDOR NAME AND ADDRESS

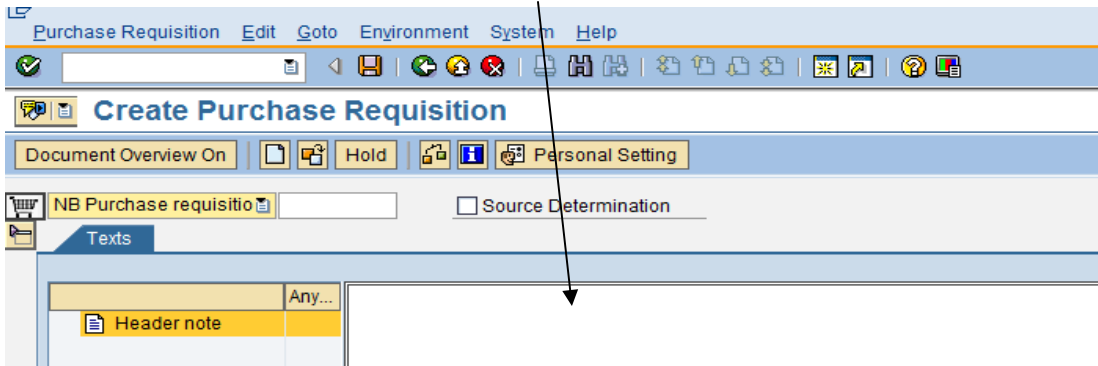


Header notes Use this field to provide information to Purchasing such as 'pricing has been confirmed'. You may also use this field for notes for your department for future reference, FOB terms if known or requesting that a new vendor be added.

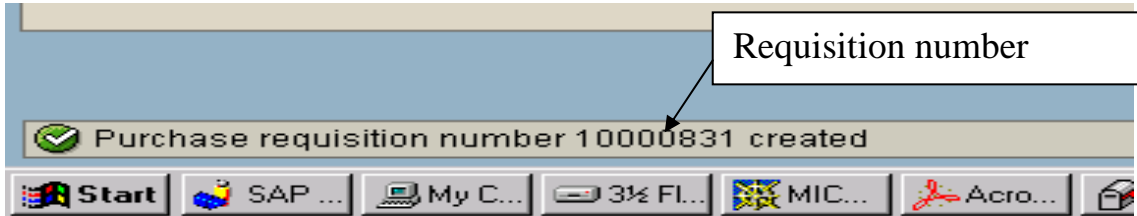
Click on 'Header':



Enter instructions in the text box:



SAVE - When you save your document, you should receive notification that your requisition was created and you should be given a requisition number at bottom of your screen. Note: Make sure you have your screen maximized to see this information.

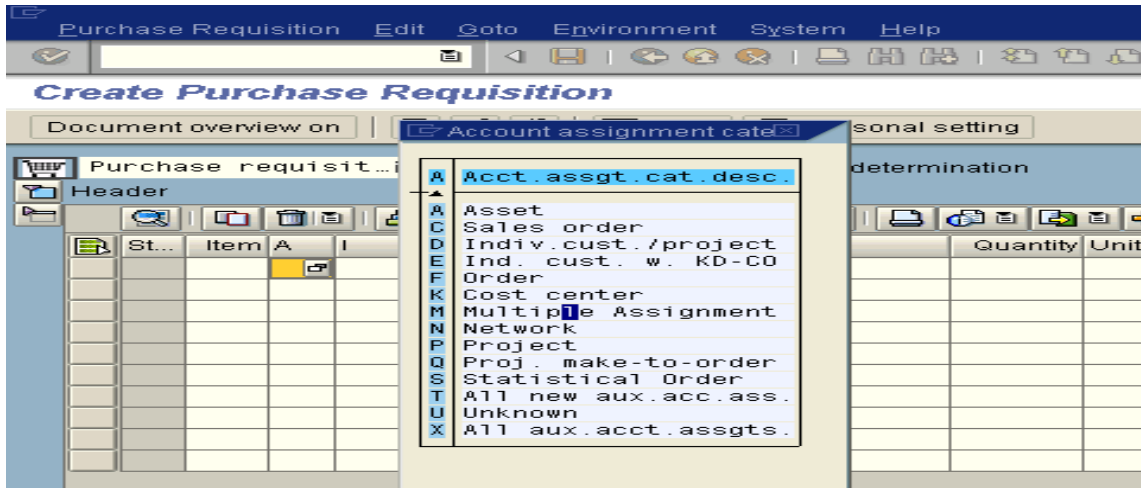


Purchasing will now take your requisition and either go out for bids, quotes or turn into a purchase order.

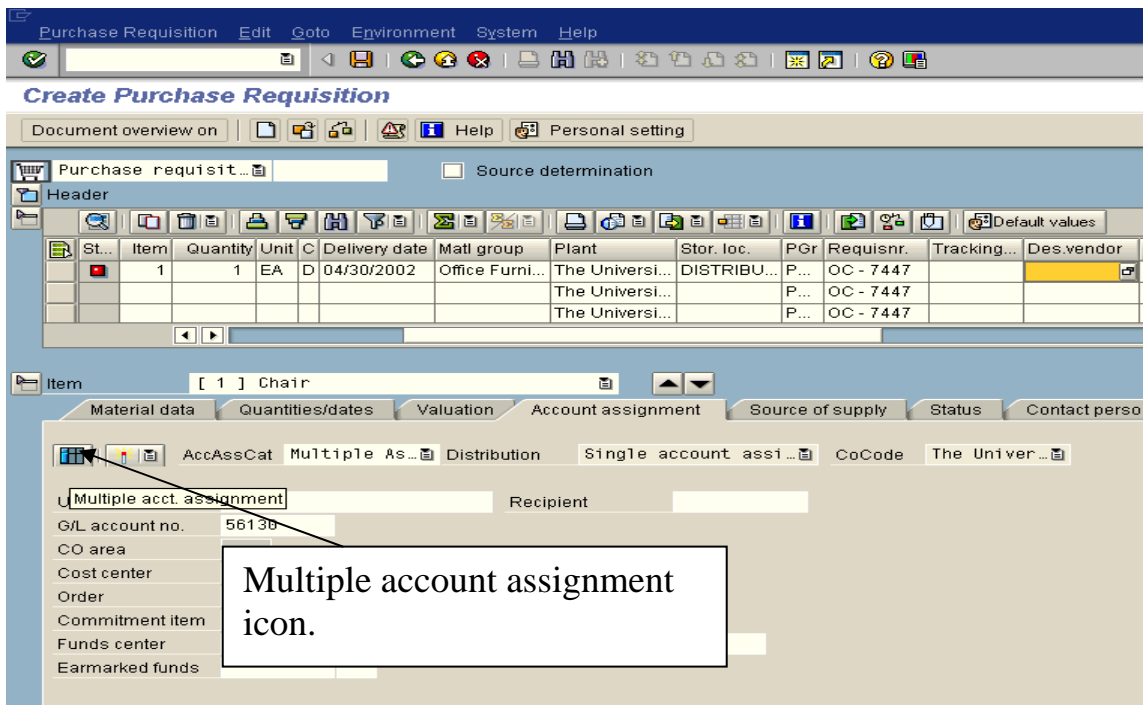
Multiple Assignment

Item that will be different if you need to charge to more than one cost center/internal order.

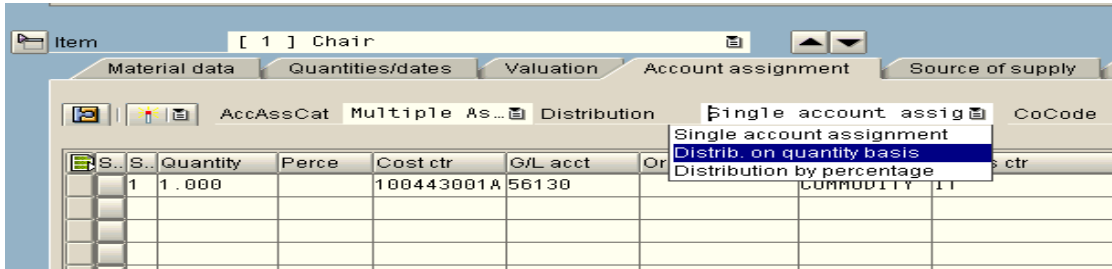
A - Account Assignment – Select M for Multiple Assignments



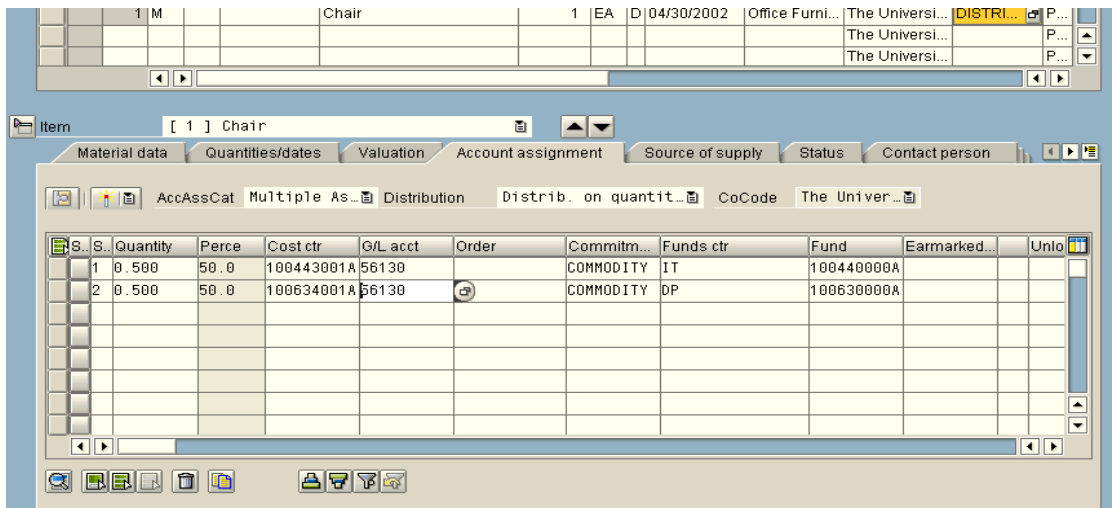
Multiple acct assignment icon – Left-click on Multiple account assignment icon.



Distribution – select Distribution by quantity basis or by percentage.

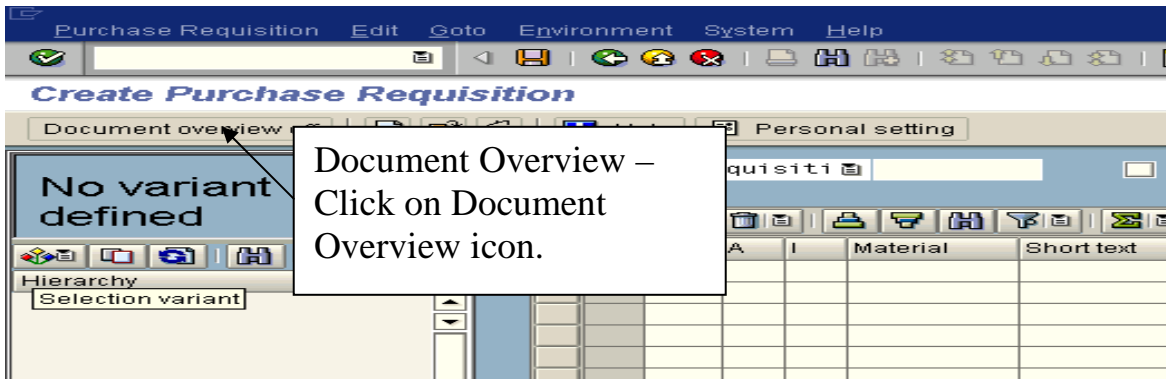


Quantity – Change quantity or percentage in Quantity column.

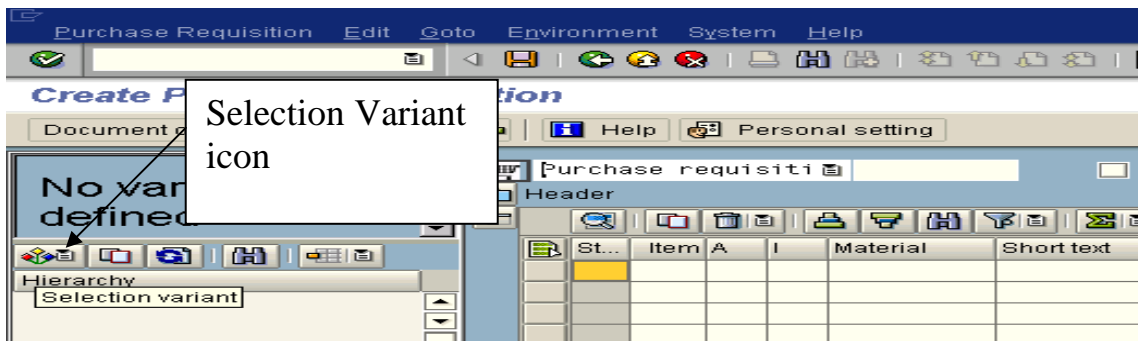


Copying an old Requisition

Document Overview: Document Overview must be displayed.



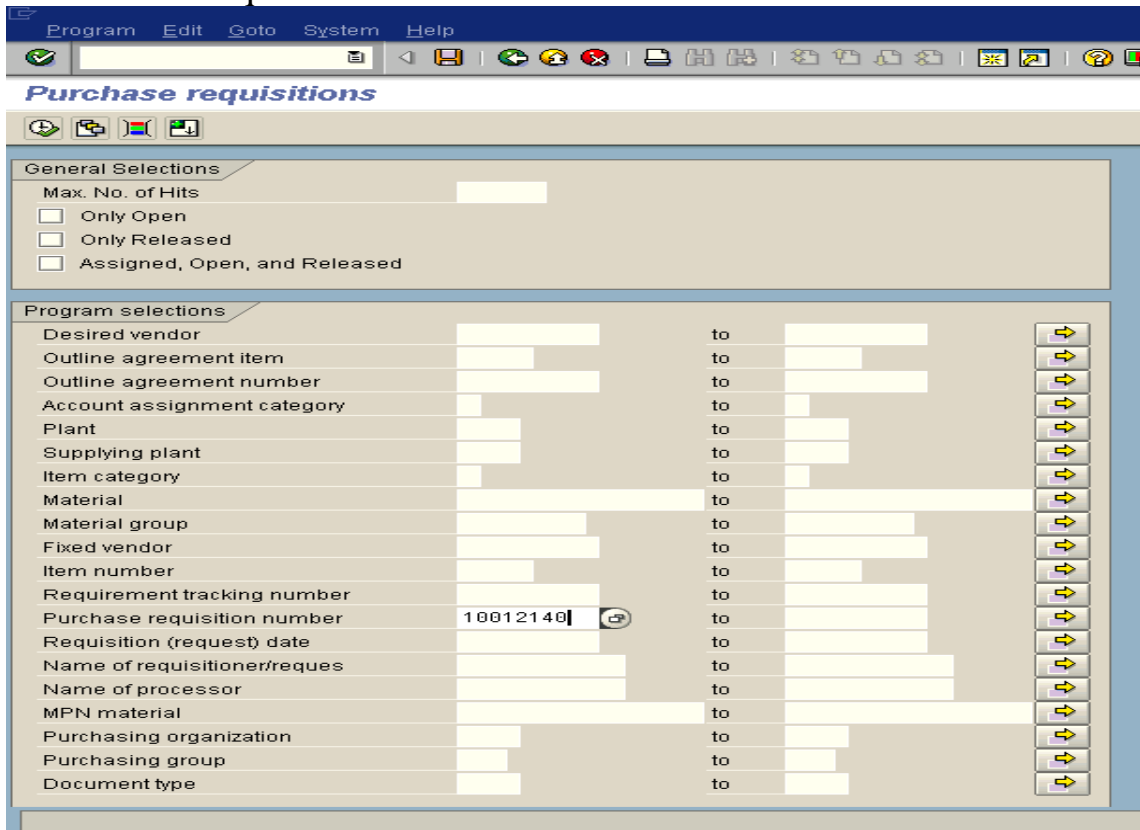
Selection Variant – Left-click on Selection Variant icon.



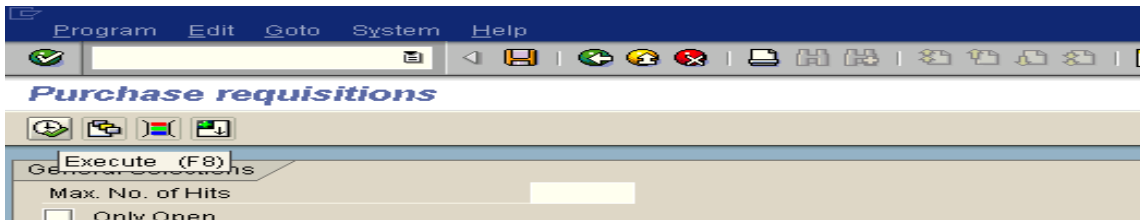
Purchase Requisitions – Left click on Purchase requisitions.



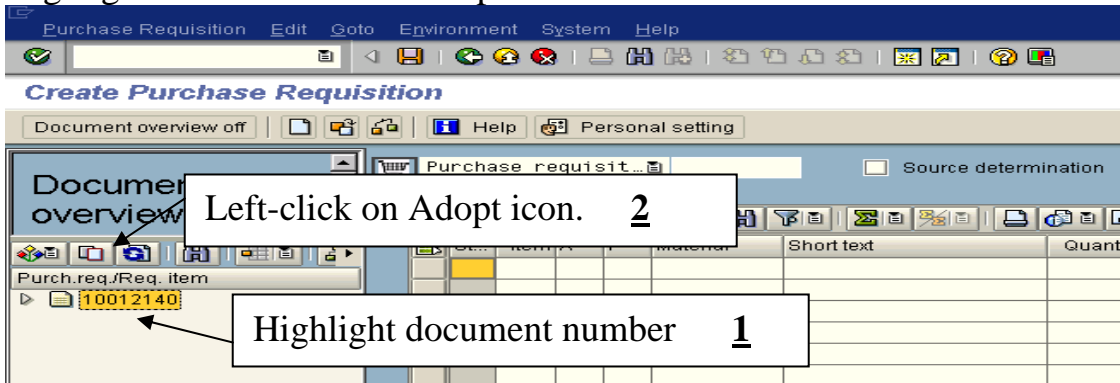
Purchase Requisitions screen may have data, if so, delete all data. Enter old Purchase requisition number in field.



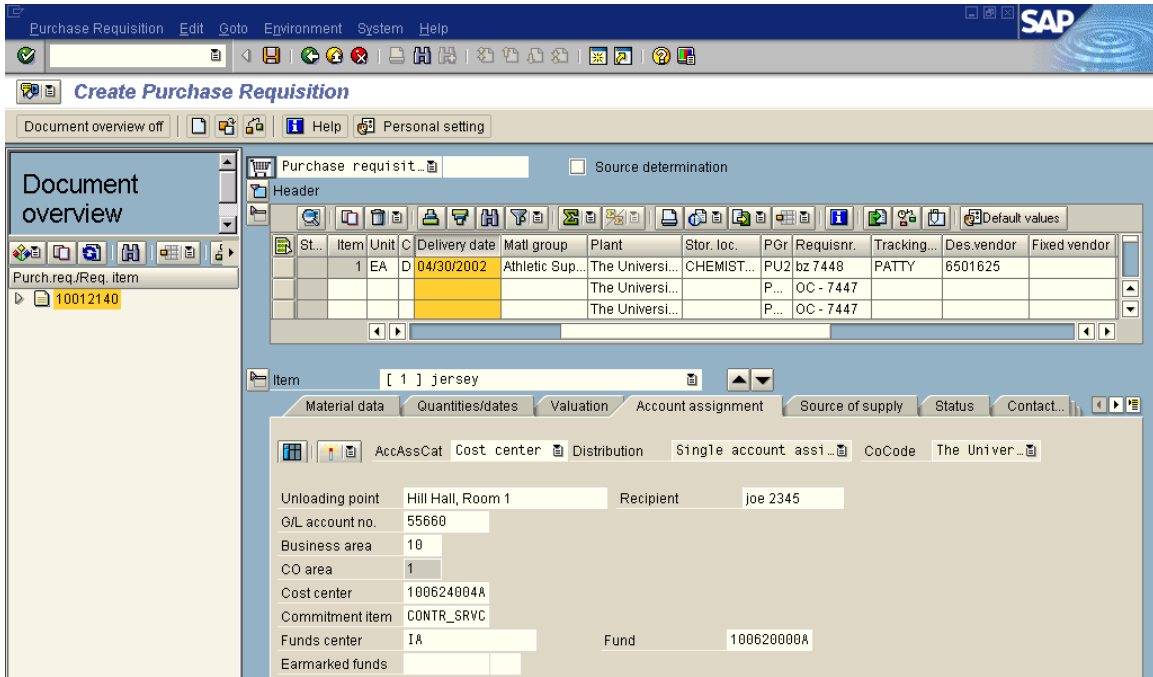
Execute Icon – Left-click on Execute icon.



Document number should now appear in the Document Overview box. Highlight and left-click on Adopt icon.



Make changes - Make any changes and then save document, example delivery date.



Save – Left click on the save icon and new purchase requisition will appear at the bottom of the screen.

