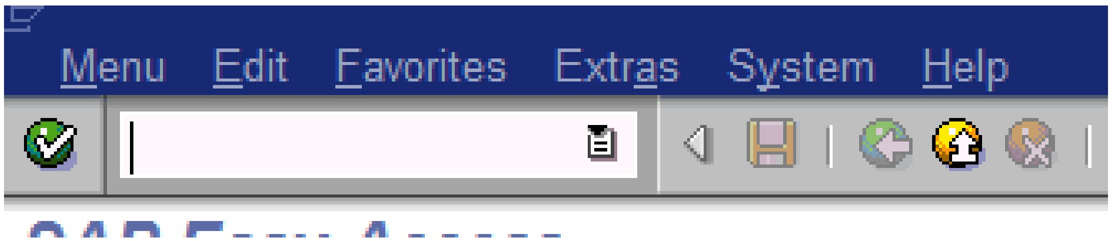
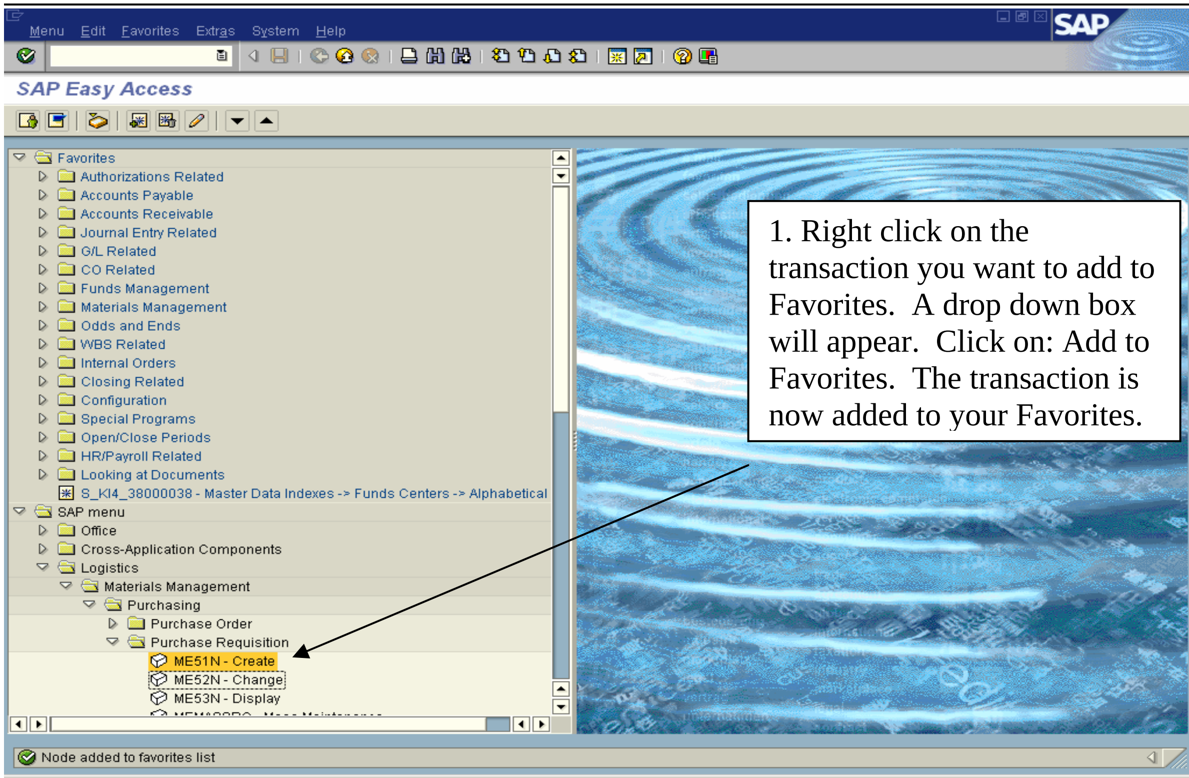
Table of Contents

Purchase Requisitions – Customizing Your Desktop Settings: Create Your Favorites Menu

Users can create their own menu of frequently used transactions, using Favorites at the top of the screen. Favorites are like Bookmarks that will save you time when accessing frequently used screens.



You can insert and remove transactions, creating your own user menu. You also have the ability to add folders to organize your Favorites. Click on Favorites, Add Folder, and name it in the pop-up box.



Add the following to your Favorites menu:

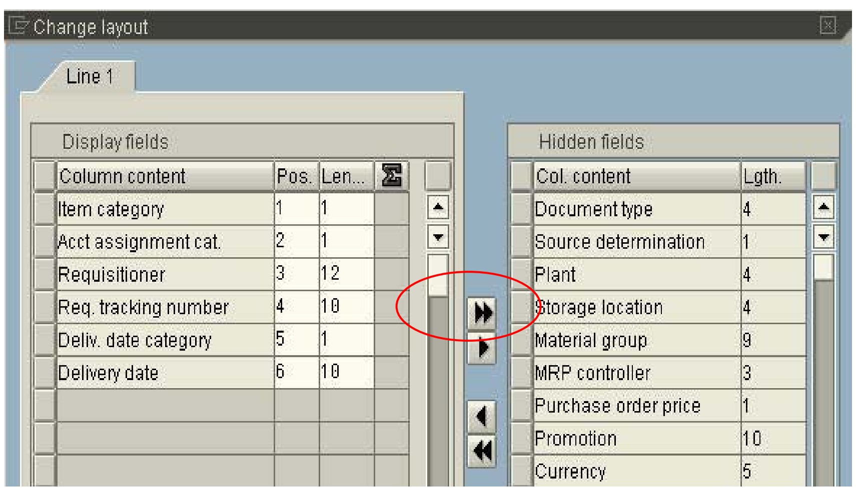
ZBUDSTAT_NOCF	Budget Check
ME51N	Create Requisition
ME53N	Display Requisition
ME23N	Display Purchase Order
ME2L	Purchase Order by Vendor
ME2K	Purchasing Documents by Account assignment

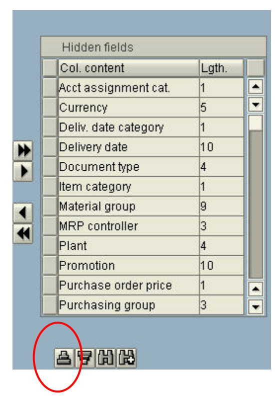
Personal Settings

In this section you will be setting up default information that will automatically place text information in the purchase requisition without you having to type it in. Time spent with this section will save you many, many keystrokes in the future.

- from the 'Favorites' folder on the left of your screen double click on ME53N 'Display Purchase Requisition'.
- when the 'display purchase requisition' screen appears click on the 'Personal settings' button on the bar. This button is located on the top third of your screen in the middle, as illustrated below:

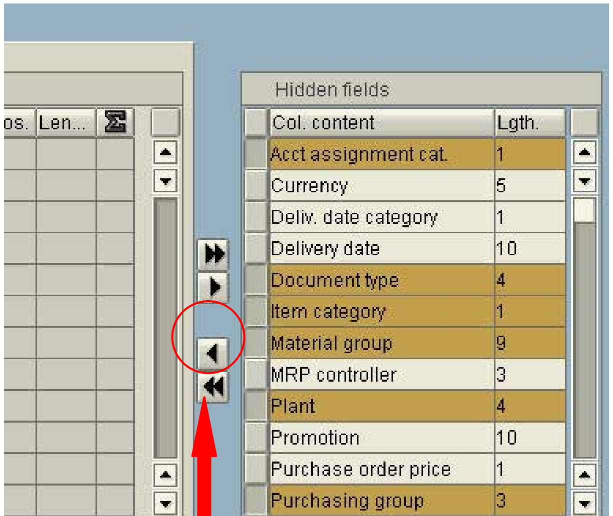
- when the pop-up box appears click on the 'default values' tab
- click on the 'More fields' button, the 'Change layout' pop-up text box will appear
  In the text box to the left, with the tab labeled 'Line 1', click on the 'double arrows right' icon. This will move all the lines from the 'Line 1' text box to the 'Hidden fields' text box.





click on the 'sort in ascending order' icon located below the 'Hidden fields' text box

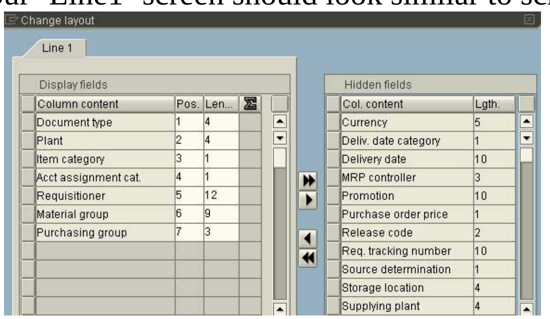
In the 'Hidden fields' box click on the small box to the left of the following lines: Acct Assignment, document type, item category, material group, plant, purchasing group and requisitioner. As you click on these fields they will become highlighted.



Use the arrow keys to scroll down for requisitioner

After highlighting these items in the right column, click on the 'single arrow pointing left' icon. This will move all the highlighted fields from the 'Hidden fields' box to the 'Line 1 box.

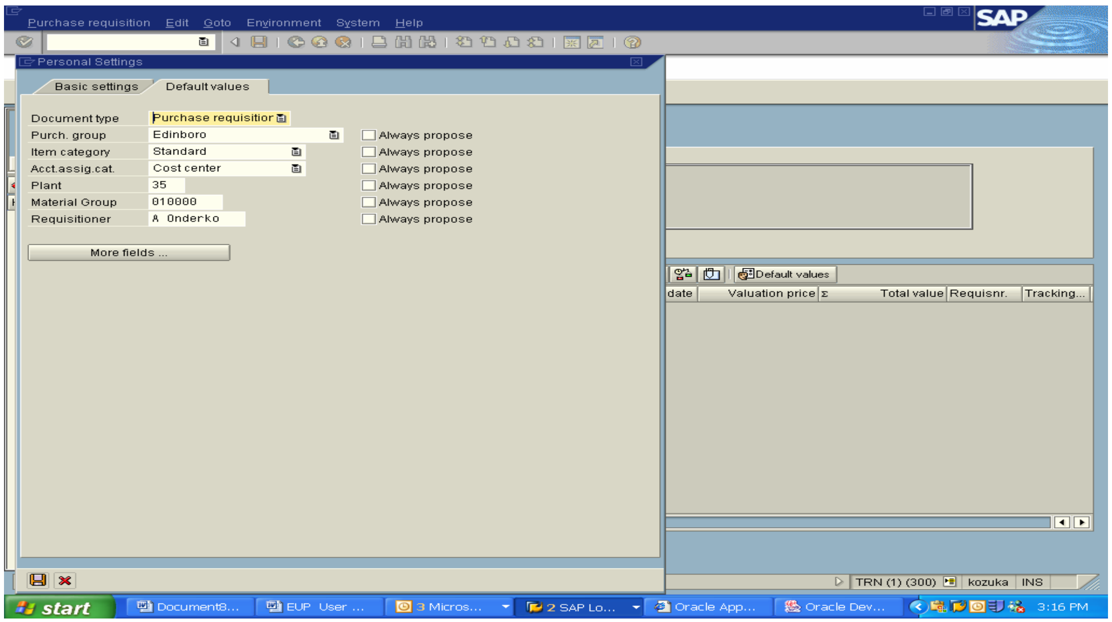
Your 'Line1' screen should look similar to screen below:



Next, press "Enter" on your keyboard to move to the next screen.

When the ‘default values’ box appears type or choose from the drop down menu following information:

Document type	Purchase requisition
Purch. Group	Edinboro
Item category	Standard
Acct. assig. cat.	Cost center
Plant	35
Material Group	010000
Requisitioner	Put your name in this field. Your screen should look similar to the one below:

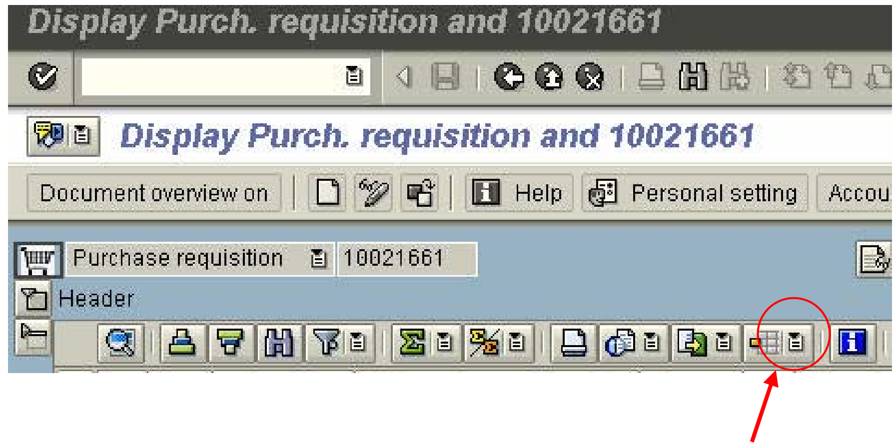


Click on the ‘save’ icon on the bottom left on your screen

Default Settings for Purchasing Screens

Click on expand 'Item overview' icon to open this section.

This icon toggles on and off. Make sure it looks just like this so you can see the icons across this line.



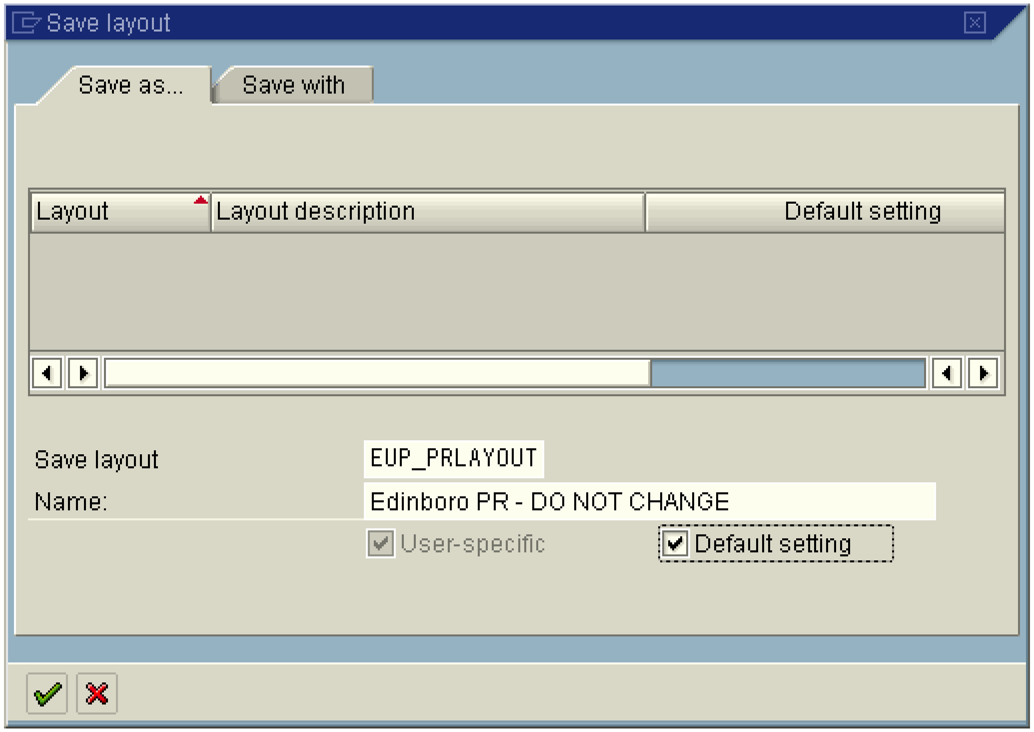
Click on the very small drop down menu icon to the right of the 'Select layout' icon on the Item Overview menu bar.

- Choose 'select layout' from the menu.
- Double click on the line /EUP_ PRLayout. This will customize your column headings for the things we need entered at Edinboro

Once again click on the very small drop down menu icon to the right of the 'select layout' icon. This time click on '**save layout'**

In the 'save layout' field, located near the bottom of the screen, type in:
EUP_PRLayout Do Not Change. Type in the Name field: Edinboro PR – DO NOT CHANGE. In addition, click on the 'default' box so that there is a check mark in this box. The 'user-specific' box should already be check marked. If not, click on this box too.

Your screen should look like this:



Press **'enter'** key on your keyboard.

Congratulations, you're done - aren't you glad you only have to do this once?!

Creating A Purchase Requisition Use Transaction ME51N

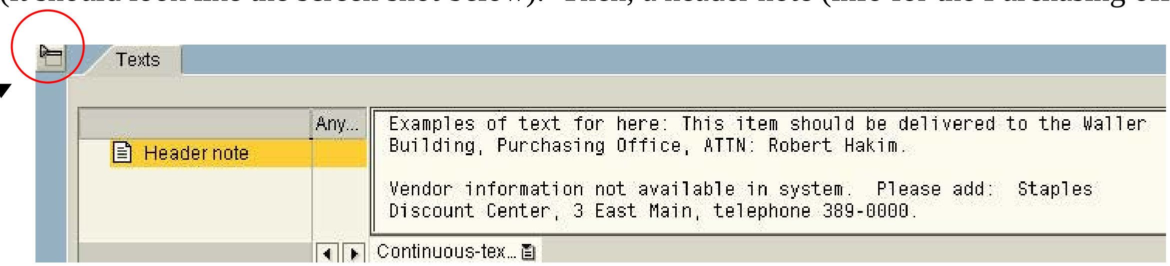
You will find this transaction under Favorites in the Purchasing folder. Before you start, make sure you have funds in the cost center and commitment area you plan on using. Refer to the Budget training materials to look up budget funds availability.

This screen is divided into 3 main parts….Header, Item Overview, and Item Detail.

Section 1 ~ Header

Make sure the header area is open (it should look like the screen shot below). Then, a header note (info for the Purchasing office).

Expand or collapse this section by clicking on this icon. It toggles off and on.



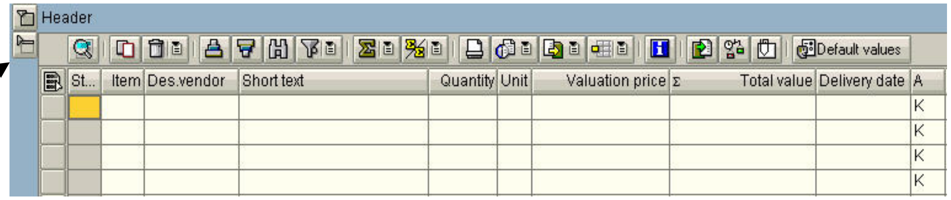
The header is the area where you will communicate with Purchasing. Please include everything you want Purchasing to know about your requisition. When applicable, this area should include the following information:

- Name and phone number of the vendor from whom you received a price or quote.
- Name and phone # of the person at Edinboro University that purchasing should call in case there are any questions
- Attachments that you will be forwarding to the purchasing department. Please include the purchase requisition # on all attachments.
- Rush orders.
- Where delivery should be made if the delivery is not to be made to your office.
- New vendor name, address, and phone # if you do not find a vendor in the 'desired vendor' section noted below.
- Information regarding special discounts and payment terms.

Header information is for internal use only.   It does not print on the purchase order.
When header is filled out, you may collapse it (click on Header icon) and go to Item Overview.

Section 2 ~ Item Overview – This is the next section of this transaction

If this section is not open, click on this icon to toggle it open.



FILL IN AS FOLLOWS:

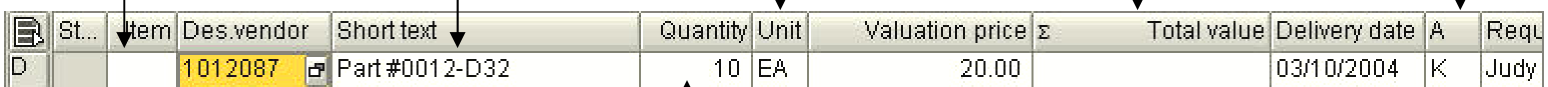
No need to fill in Item field; system creates a line # once all info is entered.

Enter Part # or Model #. Short description (Limit 40 characters)

Use drop down box to choose unit (ea, dz, etc).

No need to fill in; system does for you!

K is default (for cost center). If this is a Grant or Project purchase, change this to G or P



A paper list of cross-over vendors will be provided OR to search, click in this field and use the drop down box to find vendor. Tab titled Vendors: Purchasing should be used.

1) Click on the line called "Name" to search. Start and finish name with asterisks, eg., *stap* (for Staples) and press Enter.
2) If list is long, sort the list by clicking on the word "city" at the top of the city column.
3) Double click on vendor if found. This will fill your field with Des. Vendor number.
4) If vendor is not found, may leave blank (put a note in the Header area to request Purchasing add vendor, supplying name, address, phone, fax).

Enter quantity

Price (is okay to enter dollar amount with no cents for whole figures).

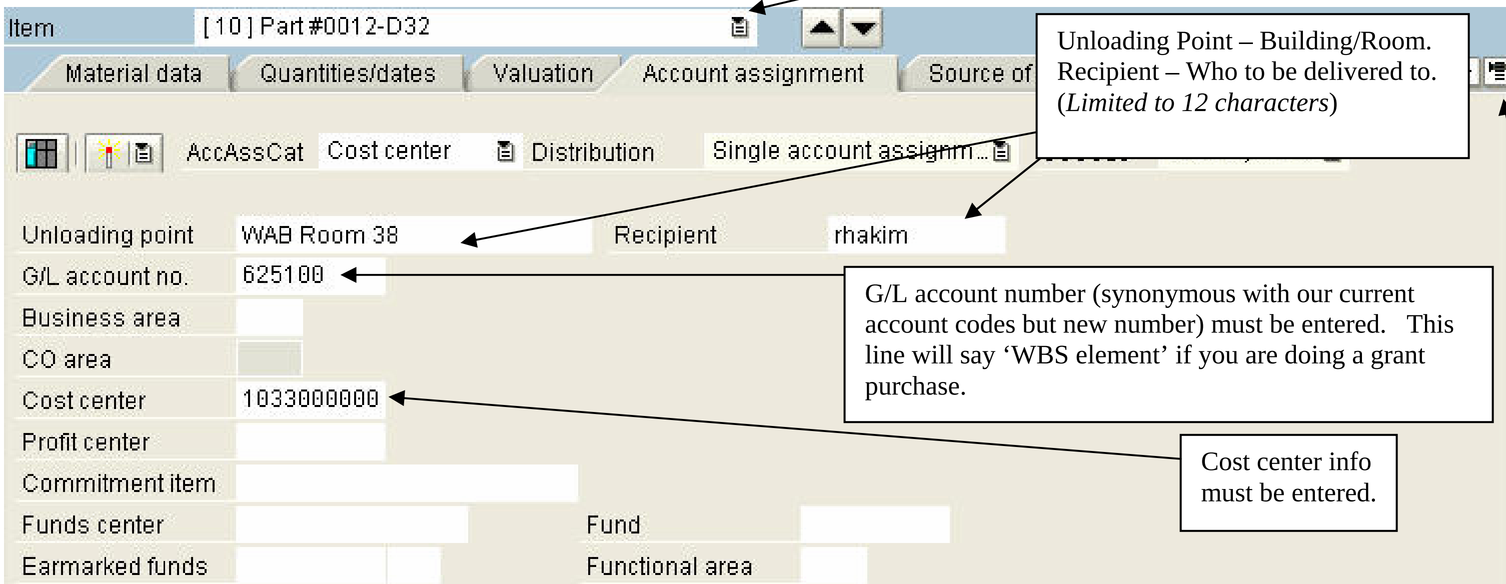
Use drop down box to choose delivery date. Enter required delivery date.

ONCE EVERYTHING IS COMPLETE (AFTER ENTERING DELIVERY DATE), PRESS ENTER WHICH WILL OPEN THE ITEM DETAIL PORTION OF THE SCREEN.

Section 3 ~ Item Detail

If you have more than 1 line item under your Item Overview, click on this drop down box to select each item. Make certain the G/L number and Cost Center is correct for each line item.

ITEMS THAT MUST BE FILLED OUT ON THIS SCREEN:



Unloading Point – Building/Room.
Recipient – Who to be delivered to.
(*Limited to 12 characters*)

G/L account number (synonymous with our current account codes but new number) must be entered. This line will say 'WBS element' if you are doing a grant purchase.

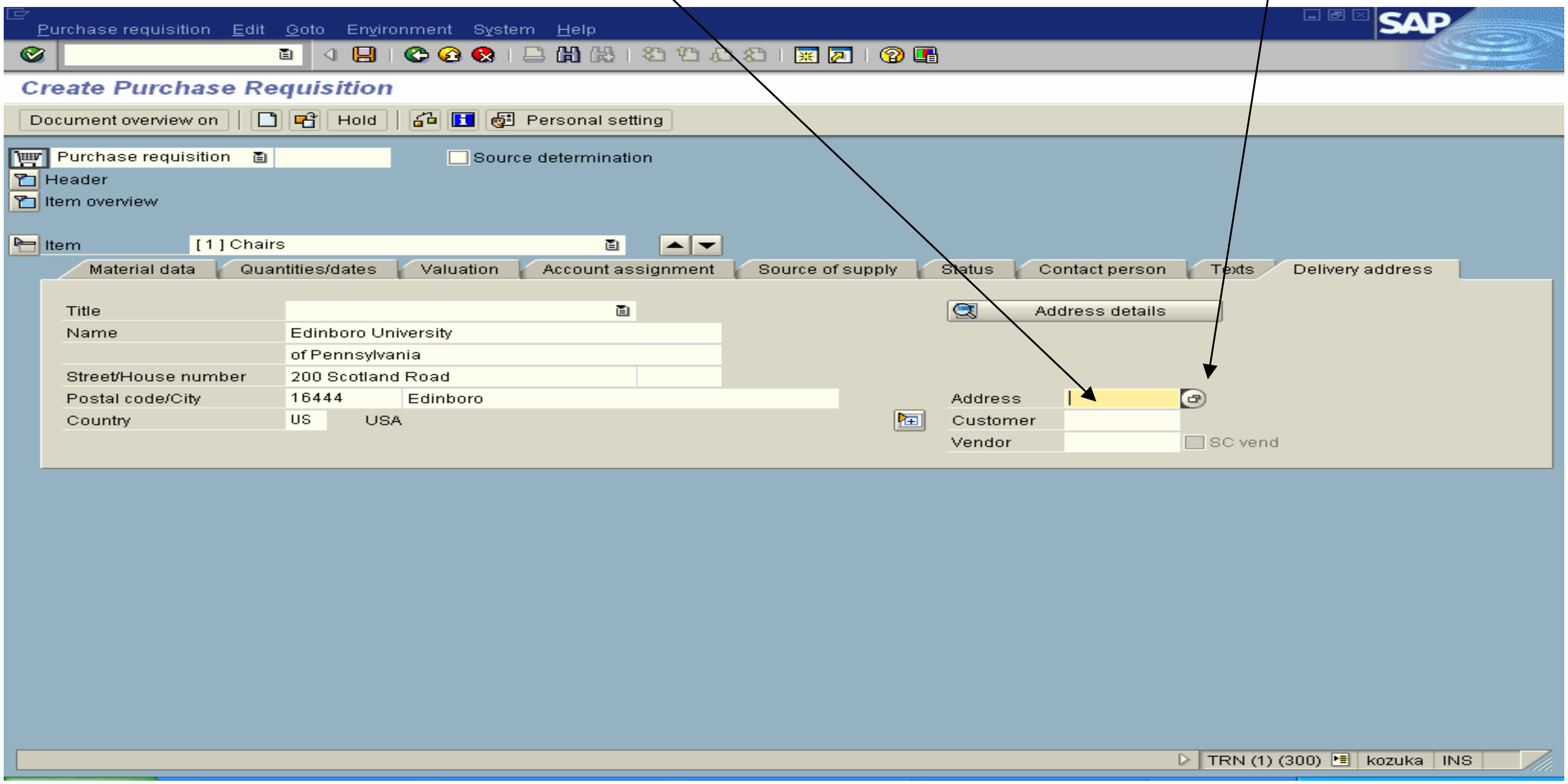
Cost center info must be entered.

Once Unloading point, Recipient, G/L account no. and cost center are entered, press the Enter key which fills the rest of this screen in.

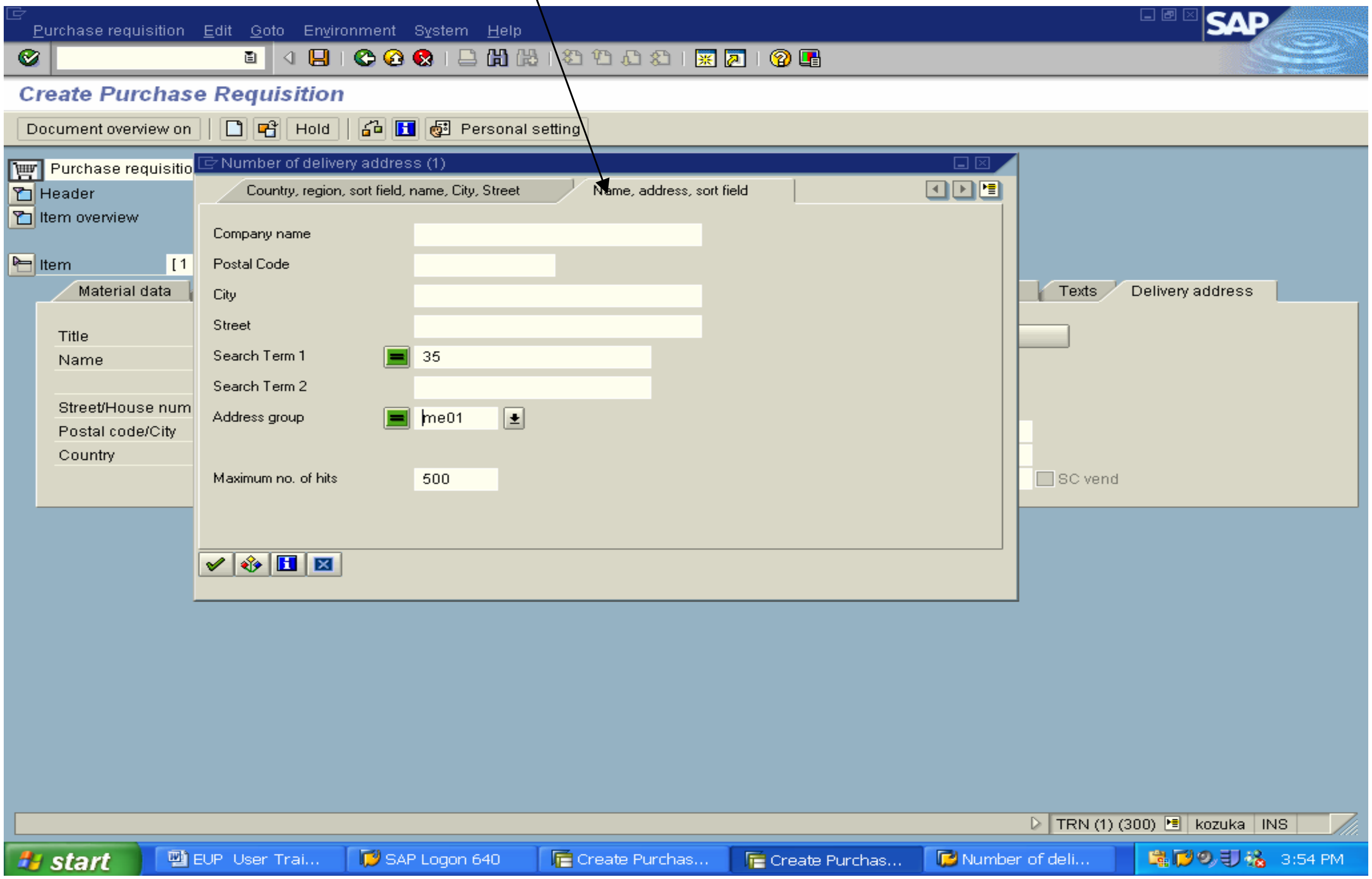
Note: If you ran out of room when entering Short Text in the Item Overview section, click on this icon to choose Texts tab. Then enter additional text under Item Text! If this is a multi-line order, be certain you have the correct line item viewing!

SELECT A DELIVERY ADDRESS:

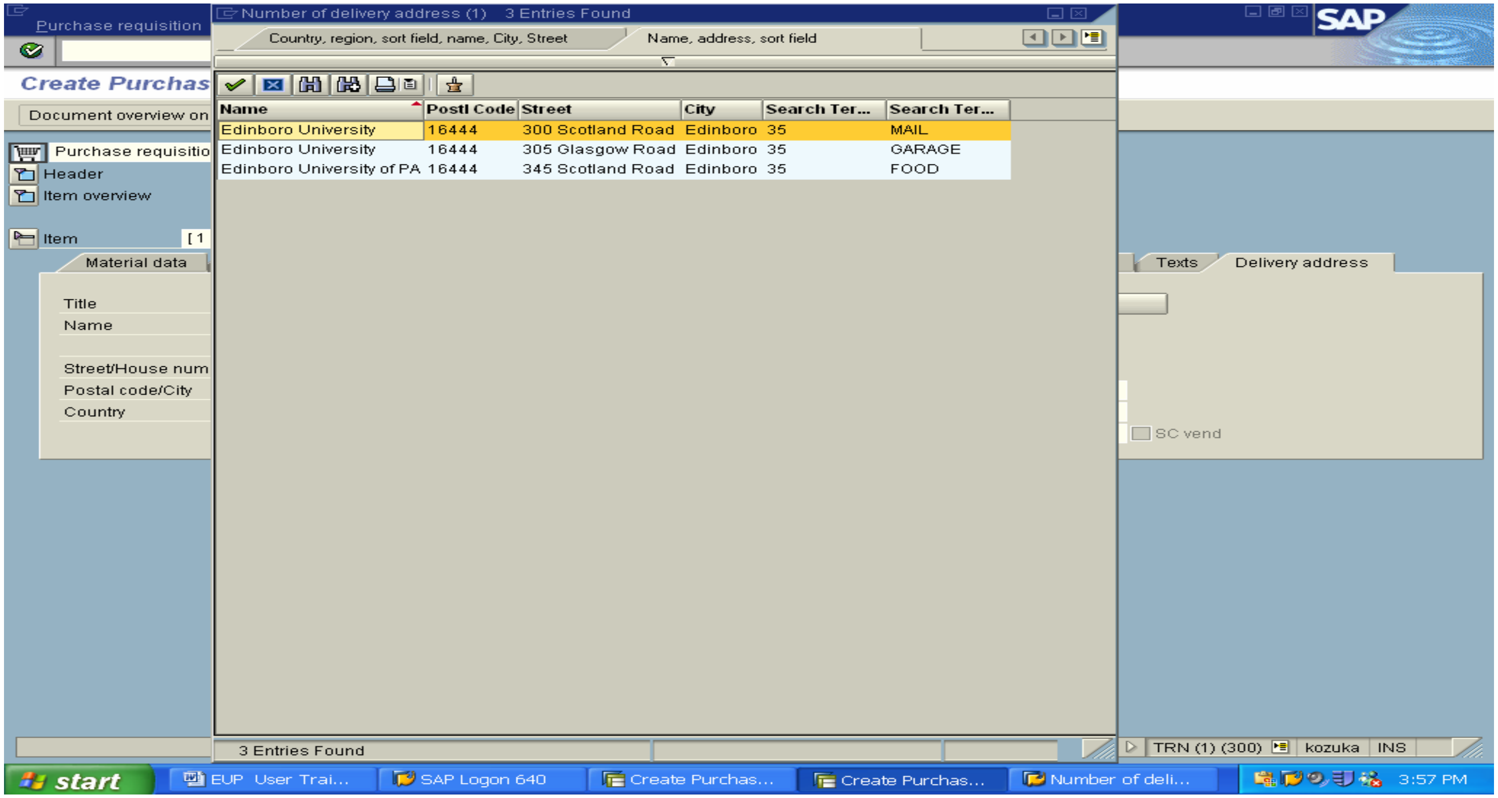
Click on Delivery Address tab and then click in Address field. Click on the circle to the right of the field.



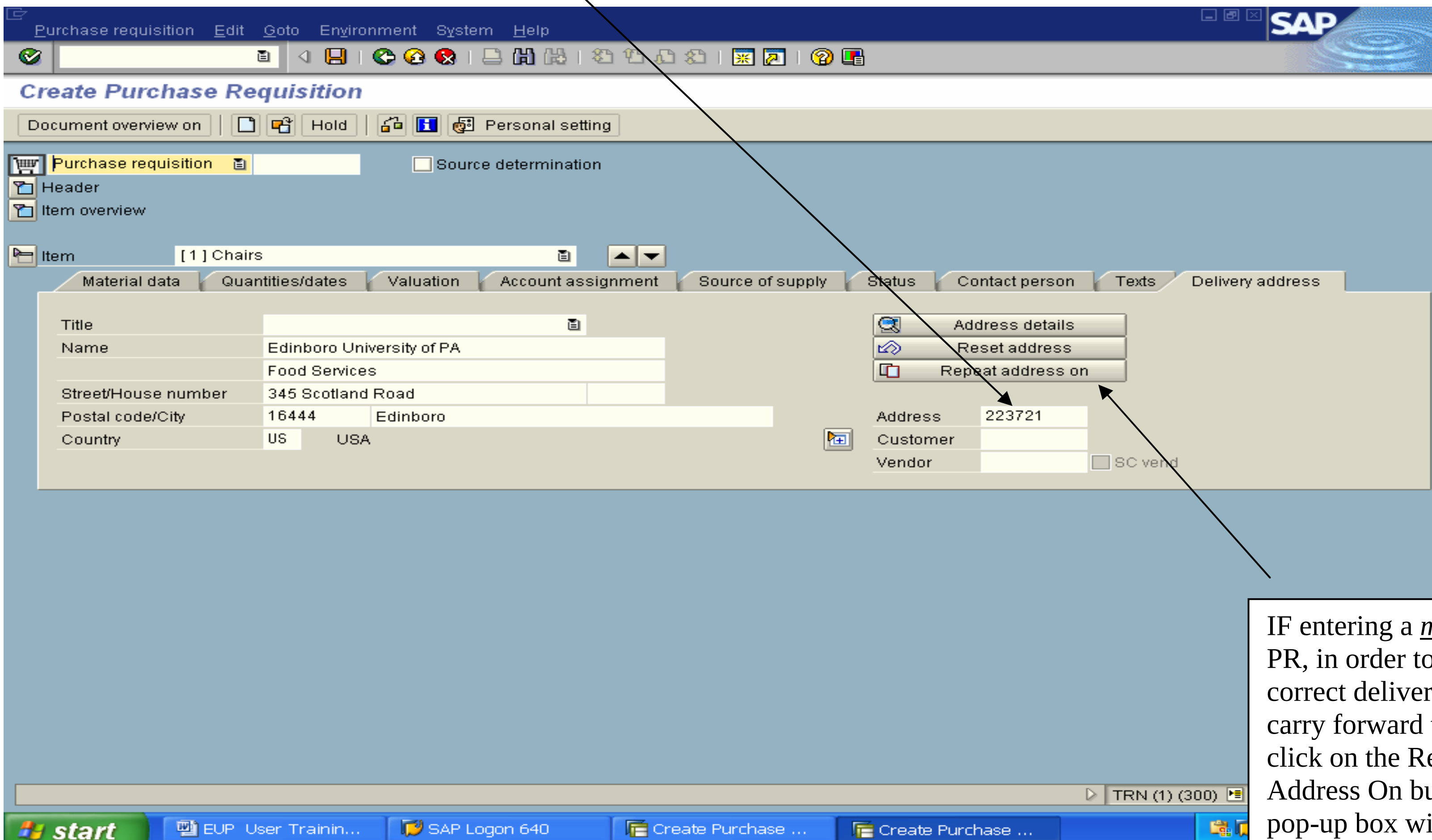
In the pop-up box, select the Name, Address, Sort Field tab. Type 35 in Search Term 1, and ME01 in Address group field**, press enter** or **click on green check.**



Find the correct address and double click.



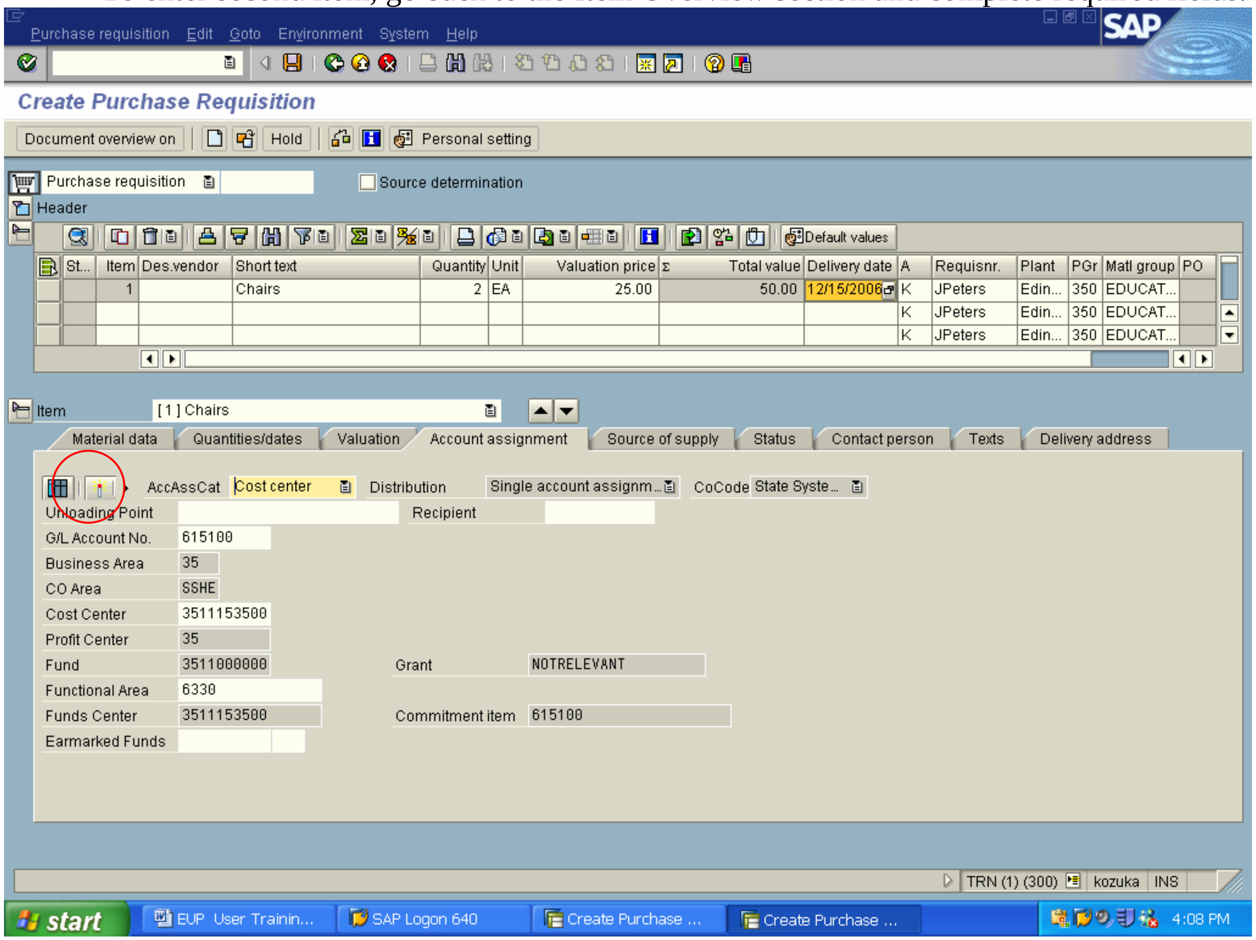
This will drop a predefined number into the field. **Press enter** to have the screen updated with the address selected.



IF entering a ***multi-line*** PR, in order to have the correct delivery address carry forward to each line, click on the Repeat Address On button. A pop-up box will appear with message Delivery Address Held. Click on green check.

Creating purchase requisitions with multiple line items with **same** account assignment

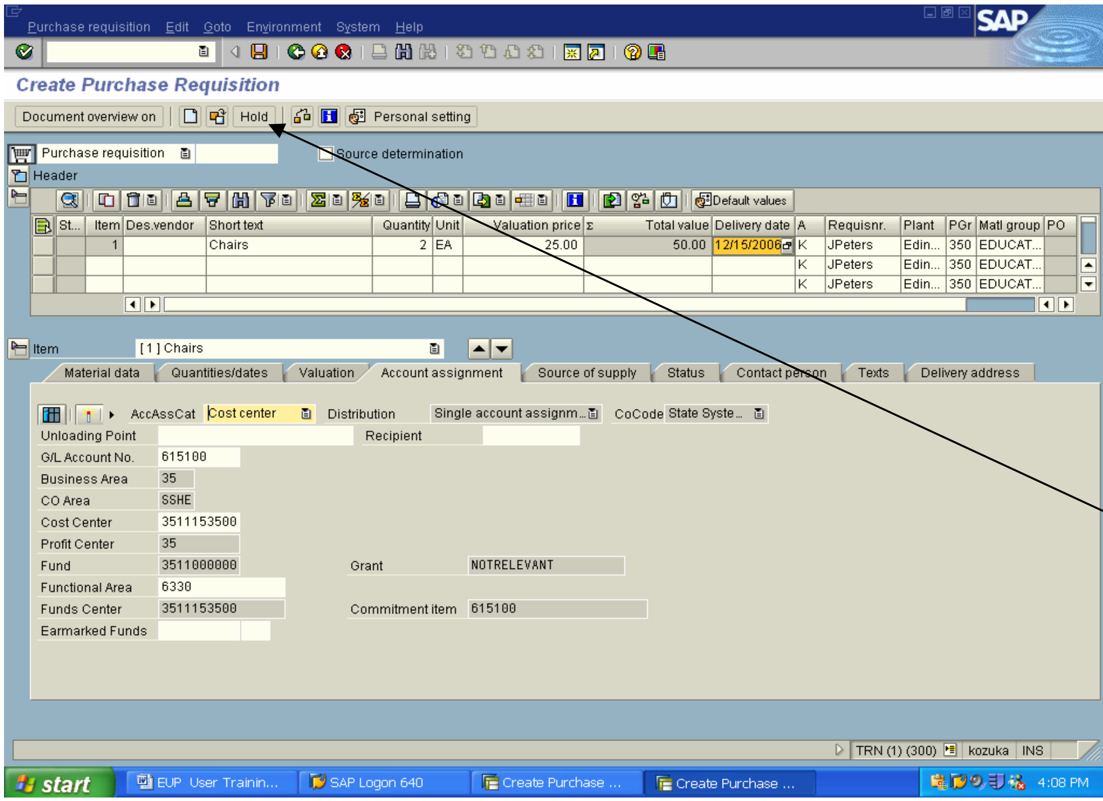
- Complete first item, through and including the Item Detail portion (where you enter unloading point, recipient, G/L number, and cost center).
- Press ENTER after finishing first line item. This will fill out additional fields in the Item Detail portion of the screen.
- For same account assignment, press "matchstick" icon. Account assignment information will repeat automatically for each line entered.
- To enter second item, go back to the Item Overview section and complete required fields.



[Saving Your Purchase Requisition]

WHEN YOU ARE COMPLETELY FINISHED ENTERING LINE ITEMS, PRESS THE "SAVE" ICON ALONG THE TOP MENU BAR.

- This looks like a little diskette. It saves and releases your PR to Purchasing.
- It is highly suggested that you write down your PR number once it is saved. This will appear in the bottom left side of your screen.



SPECIAL NOTE:
Requisitions can be placed on "HOLD" to be processed at a later time. A requisition number will still be assigned when placed on hold.

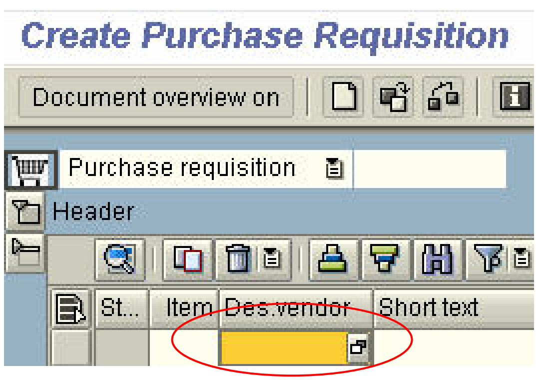
Requisition Approval/Release

After the requisition has been created but before the purchase order can be created, levels of approval have been pre-set in Edinboro's SAP system as follows:

Role name	
RQ	Requestor enters requisition in SAP
AC	Accounting reviews cost centers and accounts
RP	Responsible person (financial manager) approves all
DX	Dean/AVP approves requisitions greater than $999.99
VP	Provost/Vice President approves requisitions greater than $4999.99
FA	Fixed Assets managers review for capital assets over $4999.99
GR	Grants manager reviews requisitions for designated grants

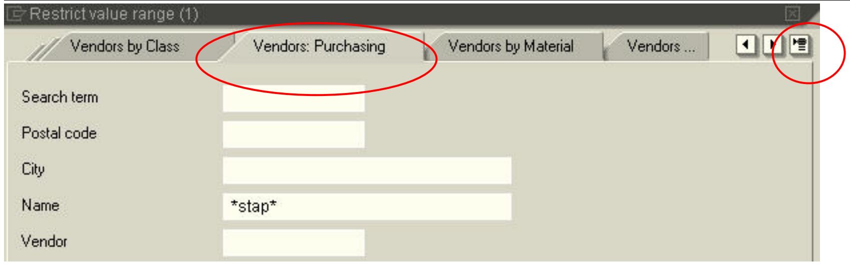
Helpful Tips:

Searching for "Des vendor" in Item Overview portion of screen ~ Click in the space directly under 'Des vendor' – a drop down icon will appear.



Click on the drop down and you will see this search window:

Be sure the 'Vendors: Purchasing' tab is highlighted. If not, click on the tablet icon on the far right and choose 'Vendors: Purchasing' from the drop down menu.



- Click your cursor in the 'name' field and type in the vendor name. Always start and finish name with asterisks. Less information is always better then more when doing vendor searches, for example, if you are looking up Staples, *stap* is better then *staples*. Hit 'enter' key.
- See if the vendor name and **correct city** you need is on the list.
- If list is very long, sort the list by the 'city' column. This is done by clicking on 'city' at the top of the column. One drawback with the above list is that a street name doesn't appear.
- Double click on your selection if it is on the list.
- If you do not find the vendor you need to exit from the screen by clicking on the blue X icon. Likewise if your search does not yield any results (a note advising you of this will appear at the bottom of your screen) exit the screen by clicking on the blue X icon.
- If you need to leave the 'Des vendor' field blank, because you did not find a vendor from the above search, it will be necessary for the purchasing department to add your vendor to the vendor database. Please provide this information as described in below:
- Open the 'Header' area of the screen and request Purchasing add vendor to database. Enter the vendor name, address/phone and fax number in the 'header note.' Click on the 'header' icon again to close this section.

Finding Vendor Address

If you have a vendor number, there is another SAP transaction you can use to view address/phone number. Use transaction **MK03** (Display Vendor). Be sure the address box is checked and hit enter. You will see address/phone information.

Item Overview Section: Columns to the Right of Delivery Date:

Item	Des.vendor	Short text	Quantity	Unit	Valuation price	Σ	Total value	Delivery date
	1012087	Part #0012-D32	10	EA	20.00		200.00	10/22/2003

- There are many fields to the right of the Delivery date column. Some of these fields contain default information which is what you set when you completed the setup instructions at the beginning of the purchasing training. If these were filled out correctly, you should not have to enter information to the right of the Delivery date column.

Ordering for grant or project accounts

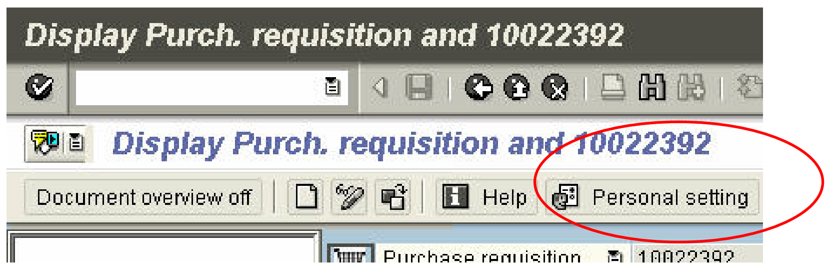
- System defaults (in item overview section) are set up for cost center purchasing.
- If you are ordering for a grant account, find the field to the right of the delivery date (in item overview) that is called “Acct. Assig. Category” – change the K to a G.
- If you are ordering for a project account, find the field to the right of the delivery date (in item overview) called “Acct. Assig. Category”. Change the K to a P.
- The Item Detail section will show a field called ‘WBS element’ instead of ‘cost center’ for grants or projects.

Using Document Overview (Transaction ME53N)

You should find this transaction under Favorites in the Purchasing folder.

Document Overview - It is very important that you learn the value of the document overview function within this software. The information contained in the document overview will provide history on all your past purchase requisitions. In addition, it will allow you to duplicate past purchase requisitions with only a few keystrokes and allow you to copy, modify, and re-release previous purchase requisitions with the new changes.

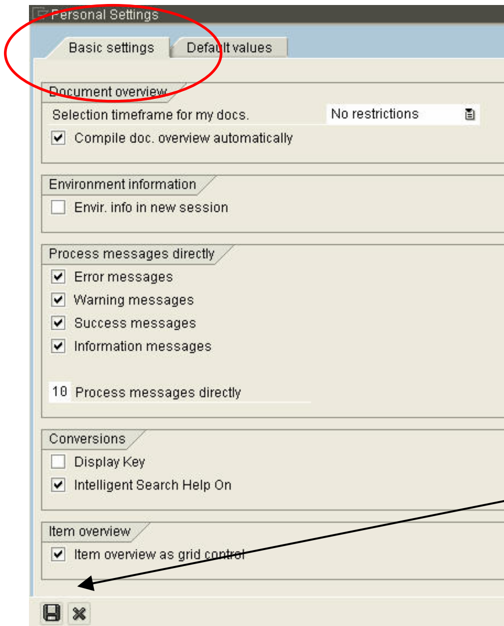
Ensuring Correct Settings to Use Document Overview ~ In order for Document Overview to work properly, you must change a setting within the transaction ME53N. Click on the area that says Personal Setting, as illustrated below:



On the next screen:

- Click on the Basic settings tab
- Click on drop down menu to the right of the 'selection timetable for by doc' field and choose 'no restrictions'.
- Click on the 'save' icon at the bottom left on your screen.

See below for illustration of how this should look!



Click on the drop down and choose no restrictions.

Click on the Save icon (diskette) to save that change!

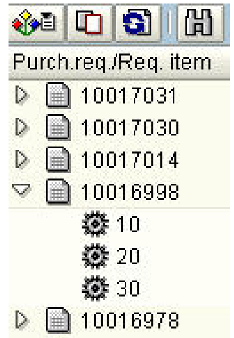
Note: The following steps will only work if you have purchase requisitions in the SAP system!

Next, click on the 'document overview on' button 

on the top left of your screen. This will open up a column of information to the left of your screen. Clicking this button on and off will change the button title from 'document overview on' to 'document overview off' and display or hide the information field. For this training session please be sure the button says 'Document Overview Off.' 

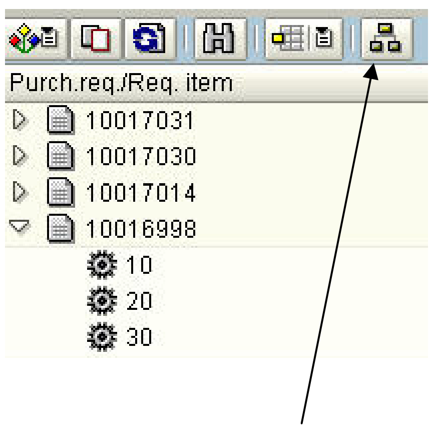
From within the 'Document overview' box click on the 'selection variant' icon and click on '**my purchase requisitions'** from the drop down menu. The display will show all the purchase requisition numbers for requisitions you have previously released.
Click on the arrow right icon next to each purchase requisition to display the line number for each purchase requisition.

Click to open any purchase requisition to see line items.



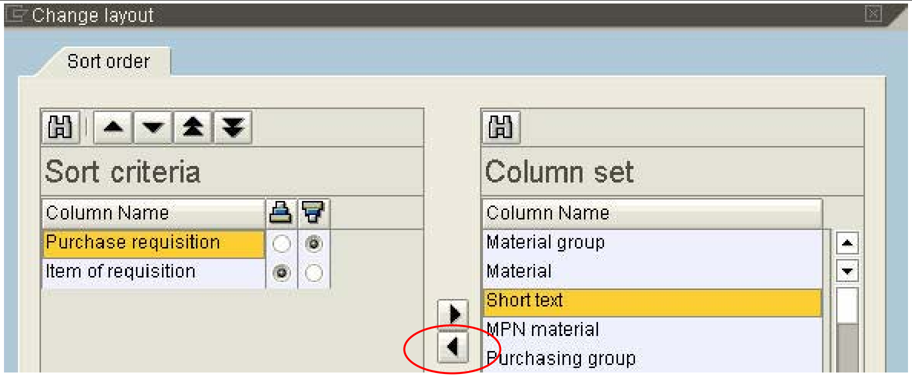
Adding Additional Data Fields To Your Document Overview

- Expand the ‘document overview’ section to the right by slowly moving your cursor along the right border of the ‘document overview’ screen until a double arrow icon appears.
- With the double arrow icon in view, hold down your left mouse button and expand the document overview window until all the icons in the window are in view, as illustrated below:



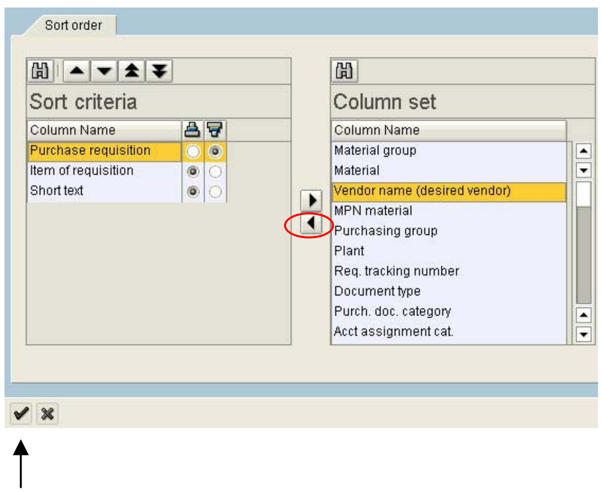
- Click the ‘change breakdown’ icon.

- Click on the words ‘short text’ from the ‘column set’ column that is within the ‘Change layout’ pop-up screen, as illustrated below:

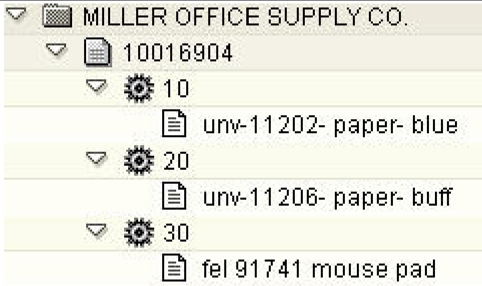


Next, click on the arrow left icon to add 'short text' to the 'sort criteria' column. This will place 'Short text' into the column called Sort Criteria.

Scroll down and click on 'vendor name (desired vendor)' from the 'column set' column that is within the 'Change layout' pop-up screen and click on the arrow left icon to add 'vendor name (desired vendor)' to the 'sort criteria' column.



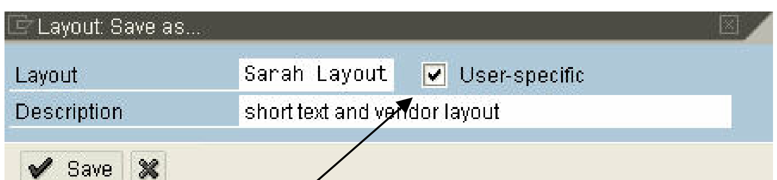
- Click on the green checkmark icon at the bottom left side of the current window.
- To see the result of what that did, click on the arrow right icon next to each purchase requisition and continue to click (drill down) on the right arrow icons. The arrows turn into downward pointing arrows and you can now see item text and vendor name displayed.



- How to save the layout you set-up above - If you do not save the above layout (to view short text and desired vendor info), you will have to re-enter the information every time you log on to SAP.
- To save the layout, click on the ‘select layout’ icon from the icon menu in ‘document overview.’ This icon is the small icon that looks like a tablet (not the icon that has the tiny yellow box).

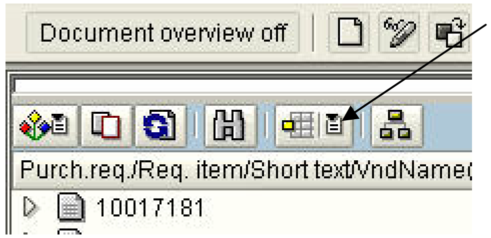
- Choose ‘save layout’ from the drop down list.

- Two fields will need to be competed in the pop-up screen called ‘Layout: save as’:
- Layout – put your name or some other identifier, i.e., Sarah Layout.
- Description – if you plan on having many layouts you may want to identify this one. Example: Short text and vendor layout.

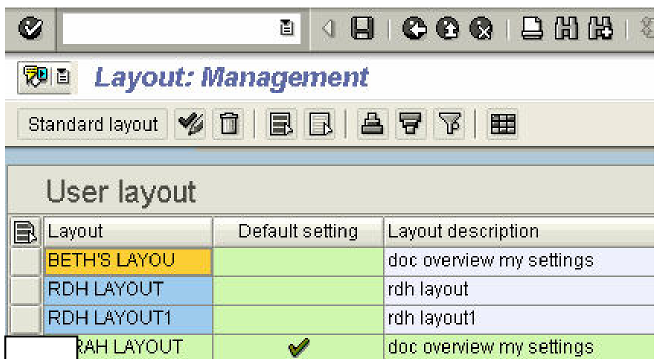


- ‘User-specific’ box must be checked.
- Click on the ‘green arrow save’ icon.

- Once again click on the 'select layout' icon from the icon menu in 'document overview.' This icon is the small icon that looks like a tablet (not the icon that has the tiny yellow box). This time click on 'manage layout' from the drop down menu.



- When the pop-up box appears, click on the layout you just created under the 'default setting' column. The green check mark will now appear in the box you just clicked.



- on the 'save icon at the top of your screen.
- layout has been saved as your default layout.
- you have completed the layout it is not necessary to have the 'document overview' column be as wide as it is now. You want to consider reducing the 'document overview' width or clicking the Document Overview button to toggle it off.
- RTANT! Once you've completed using management layout, back out of that screen or it will lock it from other users.

Duplicating A Purchase Requisition

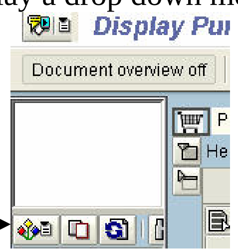
Before you get started, review the section titled “How To Use Document Overview.” (See page 21)

Double click on ‘ME51N – Create Purchase Requisition’ from the purchasing folder in Favorites.

In order to duplicate a purchase requisition the following three screen views need to be displayed:

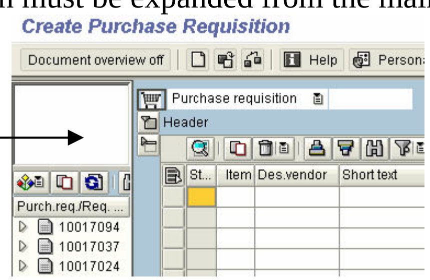
- The ‘document overview’ column must be displayed. If it is not, click on the ‘Document Overview on” button, as illustrated below:

- The ‘my purchase requisitions’ list must be displayed under the ‘document overview’ column. If it is not, click on the ‘selection variant’ icon which will display a drop down menu. From that choose ‘my purchase requisitions.’



- The ‘item overview’ section must be expanded from the main screen display to the right of the ‘document overview’ column.

Click to expand Item Overview

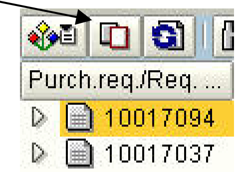


- Review the purchase requisition you wish to duplicate in ‘document overview’ from the list on the left side of your screen.

- Click on the purchase requisition you want to duplicate.

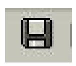
- NOTE – If you only want to duplicate a specific line from a purchase requisition then just click on the specific line under the purchase requisition and not the purchase requisition number itself.

Click on the ‘adopt’ icon located next to the ‘select variant’ icon within the ‘document overview’ section.



This will automatically place all the items on the purchase requisition in the ‘item overview’ section of the Create purchase requisition’ screen.

- Change, add and/or delete any input fields (qty, price etc) in the ‘item overview’ section. Don’t forget to update the ‘delivery date’ field.
- Expand the ‘header’ section and add all required information.
- Check the ‘item’ section to be sure the ‘unloading point,’ ‘G/L’ and ‘cost center’ information is correct.

  - Click the ‘save’ icon  to release the purchase requisition to the purchasing department.

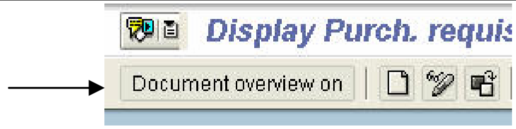
Checking the Status of a Purchase Requisition using Document Overview

Before you get started, review the section titled “How to Use Document Overview.”   (See page 21)

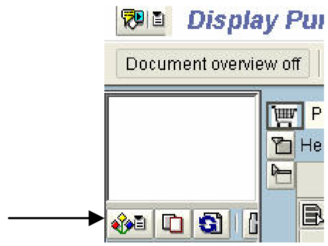
Double click on ‘**ME53N – Display Purchase Requisition’** from the purchasing folder in Favorites.

In order to check the status of a purchase requisition the following four screen views need to be displayed:

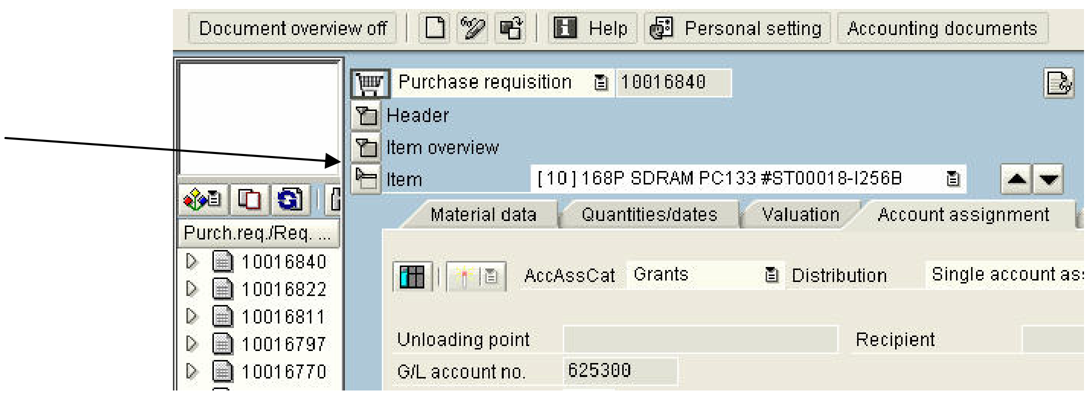
- The ‘document overview’ column must be displayed. If it is not, click on the ‘Document Overview on” button, as illustrated below:



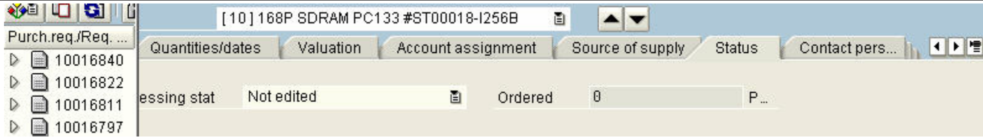
- The 'my purchase requisitions' list must be displayed under the 'document overview' column. If it is not, click on the 'selection variant' icon which will display a drop down menu. From that choose 'my purchase requisitions.'



- The 'item detail' section must be expanded from the main screen display to the right of the 'document overview' column.



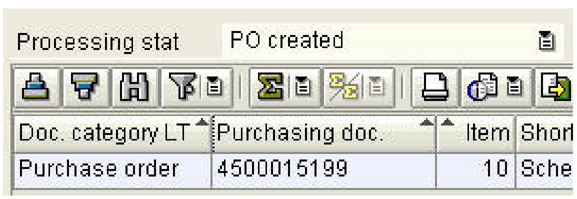
- The 'status' tab must be selected from the 'item' section. Use the scroll bar and/or the tablet icon to locate the 'status' tab if it is not in view.



Click here and choose Status tab

- Double click on the purchase requisition you wish to check on, from the list on the left side of your screen.
- In the ‘status tab’ **one of two** possible text fields will be displayed, as follows:
- The field labeled ‘Processing stat:’ will say ‘not edited’ – if the purchase requisition has not been released by the purchasing department and a purchase order has not been sent to the vendor. This is how your screen will appear:

- The field labeled ‘Processing stat:’ will say ‘PO created’- if the purchase requisition has been released by the purchasing department and a purchase order was sent to the vendor. This is how your screen will appear:

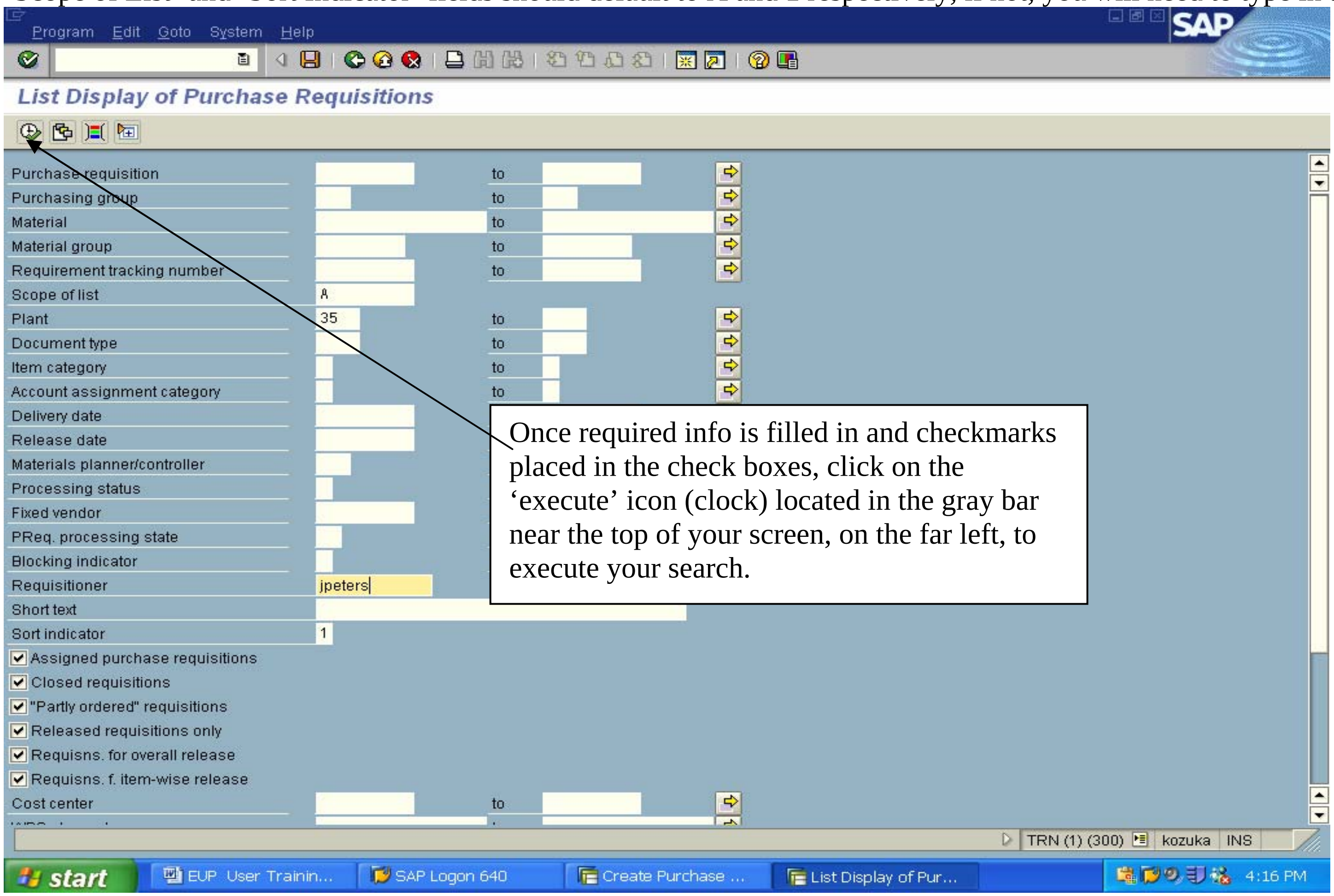


To View History of All Your Purchase Requisitions

USE TRANSACTION ME5A ~ you will find this transaction under Favorites in the Purchasing folder.
There are many fields on this screen; two fields require your input:

- Plant – Type in 35.
- Requisitioner – Type in your name as it appears in the ‘requisitioner’ column on the ‘create purchase requisition’ screen. This is the name you typed in as a default when you set up your initial desktop settings.

Be sure all six boxes are checked midway down your screen on the left side.
‘Scope of List’ and ‘Sort Indicator’ fields should default to A and 1 respectively, if not, you will need to type in this information.

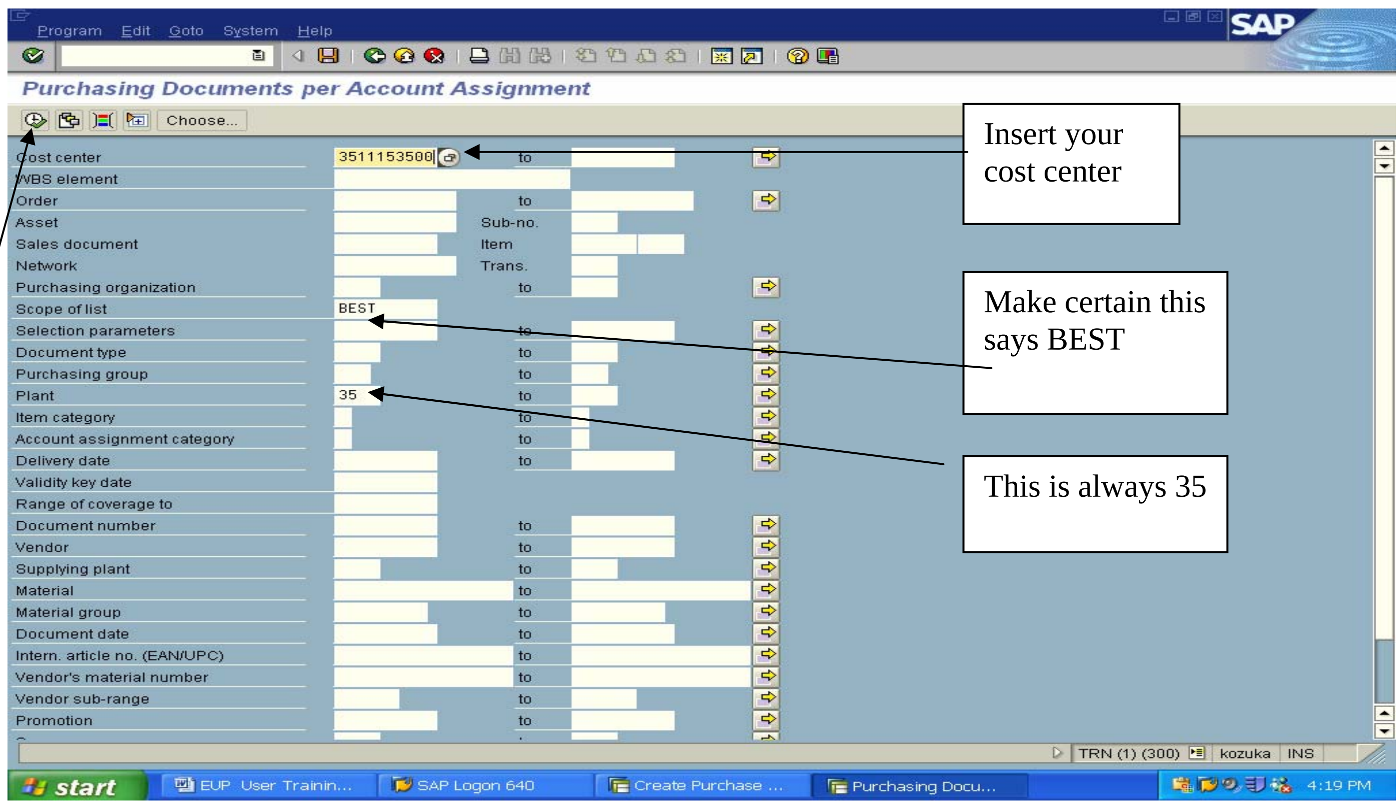


Viewing Purchase Order History for Specific Cost Center or WBS Element

USE TRANSACTION ME2K ~ you will find this transaction under Favorites in the Purchasing folder.

There are many fields on this screen, **three fields require your input**

- **cost center –** type in your cost center
  If you are looking up a WBS (Grant) element, leave the cost center field blank and type in your WBS element in the corresponding WBS field.
- **scope of list –** type in BEST
- **plant –** type in 35



Click on the 'execute' icon located in the gray bar near the top of your screen, on the far left (looks like a clock).

Congratulations!

You’ve completed SAP Requisition Training