Requisitions for materials should be entered into the on-line SAP Finance System using Transaction **ME51N** for all items that do not fall within your departmental credit card (PCard) limit. Below you will find step-by-step instructions to guide you through input. When you have completely entered your requisition a number will be assigned after you click the **Save or the Hold** icon.   If you were not successful in saving or holding the requisition and did not get a Requisition number your information was not saved and will require re-entry.

The SAP System "times out", which means that you have not entered any information or moved around in the system for 60 minutes.

Before you begin entering your requisition:

- ❖   Check your budget balance

- ❖   Look up/request your SAP Vendor ID

Note: The vendor ID to be used on SAP Purchase Requisitions must begin with "1".

 If you do not find the vendor ID in this list, complete the Request for SAP Vendor ID which can be found in the forms section of this manual.

The **Purchase Requisition** is divided into 3 main areas; each of these areas can be expanded by clicking on the respective icons:
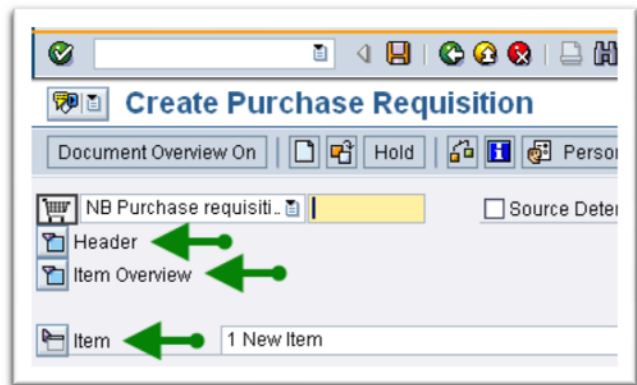

Header

Header note: The **Header Note** of **all requisitions** must include a brief description of what is being ordered on the requisition as well as where it will be used. An example of this description might be "Purchase network software "XX" for Harbold Hall". Other examples of what should be included in the Header note are:

Quote number/reference
State contract/CoStars number
Attachment is being sent to Purchasing
Please call Jane Doe 555-1212 to schedule delivery and installation of this furniture for Lyle Hall.

Item Overview

Before typing any information on the first line, click the Layout settings icon and choose Select layout, the option you want for a materials requisition is /60MTRREQ.
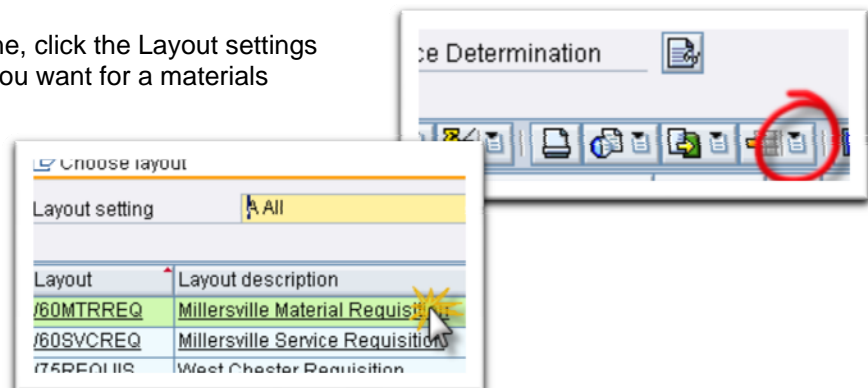
Note: There are many line items visible in this section, there is no limit to the number of line item records you enter on a requisition, the information we are currently entering now is relative only to this item. Items that are marked with an "*" are defaulted from your Personal Settings. The information that you need to enter is:

*Account assignment - the variables to choose from are:

> K - Cost Center
> G – Grant
> P - Project
> F – Order (Your Cost Center is broken down into Internal Order numbers)
> X – Mixed coding (a Cost Center and a WBS Element)

Matl group (material group) – a number that describes the item you wish to be purchased. Hit the Display Matchcode List icon to display the complete list of variables and make your choice.
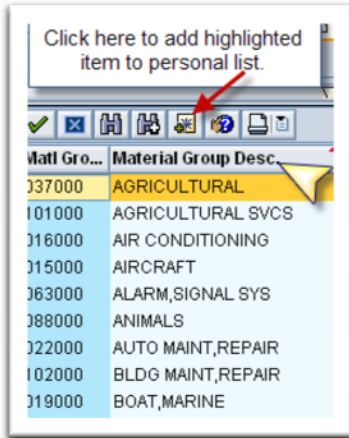
The first time you pull this list up it will be sorted in numerical order by Matl Group number, to change the sort order click the tab that reads **Matl grp description**, your list will now be in alphabetical order. Select the material group that best describes the item you wish to be purchased.

If you find that you are using the same **Material Group** number(s) more often you can add them to your own personal list. Highlight the number you want to select and click on the **Insert in personal list** icon.

Short text – Type the description of the item to be purchased beginning with the most general and descriptive noun first. Be very specific, use catalog numbers, brand names, manufacturing model numbers, colors, sizes, etc. Provide the Unit of measure detail (for example, 6/case or 4/carton). If the full description for this line item will not fit in the space allowed, you will be able to complete your text information in the next section.

Quantity – Type the desired quantity for the designated Unit of measure.

Unit of measure – Type the desired unit of measure or hit the **Display Matchcode List icon** to display the complete list of variables and make your choice.

Valuation Price – Type in the unit price for the designated Unit of measure, do not include dollar signs or commas as the system is only looking for numbers, decimals are acceptable.

Delivery Date – Type in the date the item is needed. If you do not have a specific date, type in a date that is 30 days in the future. You can also use the **Display Matchcode List** icon to display a calendar, double-click the date to make your choice. It is recommended that you add a note in **Item text** if there is a specific date that your item must be delivered. **This date controls the fiscal year of the funds.**

Des. Vendor – Type in vendor ID that was obtained from ZM08.

POrg – (Purchasing Organization) Type in **LOCL**.

*Requisitioner – Type in the first initial and last name of the person who will receive the goods/services.

*PGr – (Purchasing Group) Defaults to 600 which is the main Purchasing Group for Millersville University. This should not be changed.

*Plant – Defaults to 60.

Once you have entered all the fields above you are finished with this area but not the complete line, press enter, this will open the item detail portion of the screen where you will finish entering data for this item.

Item Detail

The information in the area is a continuation of the information you just completed in the Item Overview area. Every line item must have this information entered in order to complete (save) or hold the requisition.

If you are not already there, click the **Account Assignment** tab:

Unloading Point – Type in the building (abbreviated building), department, and room number where the materials are to be delivered. This important information tells the Receiving staff where the package is to be delivered, if needed more detailed delivery information can be typed in the Header Note.

Recipient – Type in the first initial and last name of the person who will be receiving the materials.

G/L Account No. – This is the number in the accounting string that best describes the item category.

Cost Center – This is the assigned number that describes your department. The variables in this section will change depending on what you entered in the section above **Account assignment.** The variables are: K - Cost Center; G – Grant; F – Order (Your Cost Center is broken down into Internal Order numbers).

     =If you entered K – Cost Center, complete the Cost Center field
     =If you entered G – Grant, complete the WBS Element field
     =If you entered P – Project, complete the WBS Element field
     =If you entered F – Order, complete the Cost Center and the Order field
     =If you entered X – Mixed coding, complete the Cost Center and WBS Element field by following these steps:
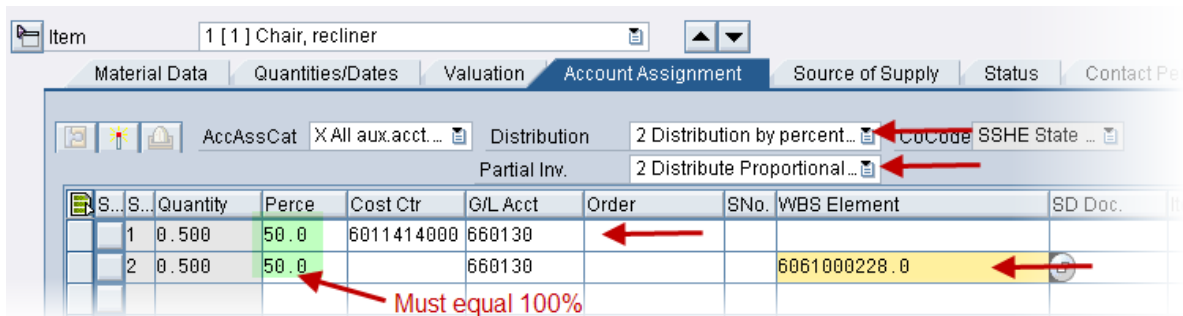
Type in the Unloading Point and the Recipient fields, and click the Multiple Acct Assignment icon.
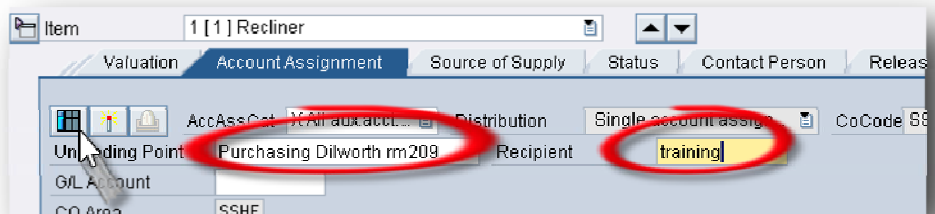
Click the Distribution icon and choose Distribution on quantity basis or Distribution by percentage.
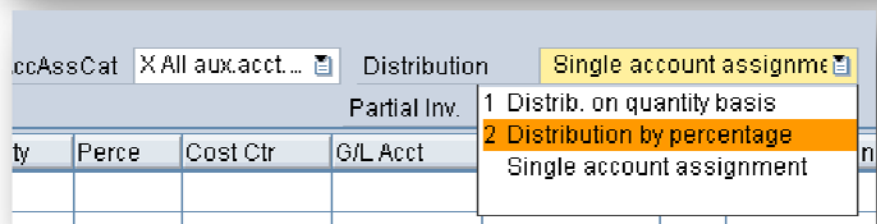
Fill out the rest of the fields as illustrated below:

Must equal 100%

Click the **Texts** tab:

Item text - This is the area where you will enter a continuation of the **Short Text** in the **Item Overview** section.

Delivery Text – Type text for this specific line item regarding delivery including special delivery dates, if needed. This would also be a good place to type delivery information such as who the vendor should call to arrange delivery/installation of furniture, equipment, which should include the person's full name as well as the full phone number.

Click the **Delivery address** tab to confirm or choose the address the material will be delivered on campus, this will be the **Ship To** address that prints on the purchase order. The default **Deliver To** address is the Receiving Department, if you need to change this, the complete list can be found in Outlook – **Public Folders, Purchasing-SAP,** double click **MUDeliveryAddresses.xls** to open. Type the corresponding number for the address you want to be printed on the purchase order in the Address field and hit **Enter**, the updated delivery address will now be displayed.

YOU HAVE NOW COMPLETED THE FIRST LINE ITEM ON YOUR REQUISITION!

If you look at the **Purchase requisition** field near to the top of the screen the number is not yet assigned.
If you shut down SAP or your computer shuts down for any reason the information you had entered will be lost!
Multi-line Requisitions (more than one line item per requisition)

When entering a multi-line order, enter the first line completely (Item Overview as well as the Item Detail sections). Go back to the Item Overview section, on your first line item, click on the far-left box (the whole line will not be high-lighted), click the Copy icon. This will copy the first line information including the Item Overview as well as the Item Detail sections to a new line. Navigate through the newly added line to change the fields that are different.
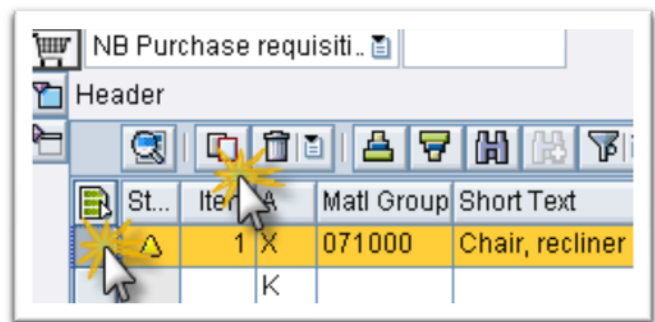
When you have entered all information regarding your
Purchase requisition click the **Check** icon, if there are entry errors you will see a red bomb, if you click on the bomb you will get a description of the error that must be corrected in order to complete the requisition.

> ❖ Click the **Save** icon when you are sure the information is entered accurately.

> ❖ To save the information on your Purchase requisition but not send it on for processing, click the **Hold** icon.

You will get your **Purchase requisition** number either in a pop-up box or at the bottom of your screen in the grey area.

Write your Purchase requisition number down, it is your responsibility to remember to take the hold off the document so that it can be processed. Purchase requisitions that are on hold do not appear in the Release Strategies (approvals) and will not be forwarded to the purchasing staff for processing.
Removing the Hold from your Requisition

To take the hold off your requisition, go to **ME52N Change Purch. Requisition,** if the held requisition is not display click the **Other Requisition** icon, in the pop-up box type in your held requisition number, and click the **Other document** icon. The Purchase requisition is displayed as "held", if the fields are not accessible click the **Display/Change** icon, you are now in edit mode and changes can be made to the document, if necessary.

Once you are sure you want to take the hold off your **Purchase requisition,** click the **Save** icon.

You will now get a message that your Purchase requisition has been changed.

The display will now change to **Display Purch requisition**, your Purchase requisition is now completed, saved, forwarded to the Requisition Release process, then on to the Purchasing Office for processing into a Purchase Order.