

Quick Reference Guide-Creating a requisition


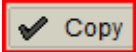
Executing Transaction

Choose one of the following navigation methods:

- From the SAP menu, use the menu path Materials Management>Purchasing>Purchasing Requisition>ME51N Create
- Type ME51N in the transaction box and click enter
- Add ME51N as a favorite and execute from favorites menu



Setting up Personal Settings

This will only need to be done once unless the settings need to be updated for any reason. Default values in Personal Settings apply only to the requisition screens

1. Click **Personal Settings**
2. Click the tab **Default Values**
3. Click the button **More Fields**
4. Select **Plant** and **Purchasing Group** from the Hidden Fields side and click the left pointing arrow  to make them display fields.
5. Click **Copy** 
6. Enter values for any of the fields that you wish to have default values (recommend purch group, plant, and requisitioner)

Entering the Requisition

Item Overview Section

1. Click Expand  to open the Item Overview screen section if it is not expanded
2. Enter the **Acct Assig. Cat**
Enter a K for cost center or a G for grant
3. Enter the **Material Group**.
Note: This field is used for reporting so please try to be as specific as possible.
4. Enter the **Short Text** or description of the item.
5. Enter the **Quantity**.
6. Enter the **Unit of Measure**, e.g. EA for each.
7. Enter the **Deliv. Date**.
8. Enter the **Valuation Price** (per unit).
Note: if the qty is being entered as priced per 100 or per 1000, you must go to the valuation tab and ensure that the correct qty per unit is entered or it will inflate the value of your requisition.

9. Enter the **Requisitioner**.
Note: it is important that the requisitioner name is entered consistently so that you receive a complete listing when you do a list display. (It is recommended to set up as a personal setting using first initial last name, all in lowercase).
10. Enter the **Purch Group** (buyer no.)
11. Enter the **Plant**.

12. Click Enter 


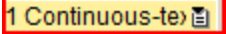
Note: if you have errors, the system will alert you to the fields that are required.

Example screen:

Item	A	I	Matl group	Short text	Quantity	Unit	Delivery date	Valn. price
1	K		PLUMBI...	valve	2	EA	11/15/2008	5.00
Requisnr.	Trackin...	Des.vendor	Fixe...	Created by	PGr	Plant		
kauchenb...	kauche...			90KAUCHEN...	903	PA S...		



Item Detail Section

Note: After you click Enter, the item detail section is expanded and the system should take you to the account assignment tab.

1. Enter the **Unloading Point**
2. Enter the **Goods Recipient**
Note: Default values can be set up for both of these fields by creating user parameters ZUP and ZGR
3. Enter the **G/L Account Number**
4. Enter Either the **Cost Center** or **Grant Number**.
NOTE: If you have more than one line on your requisition and the account assignment will be the same for all of the lines, click Repeat On  after entering the information for the first line. It will copy to the remaining lines.
5. Click the **Texts Tab** to enter additional text description. If you have a large amount of text, use the dropdown  and select SAPScript editor to get a full screen. The editor includes word processing functionality like cut and paste.





Vendor Information

If you know the vendor number, you can enter it in the field **Des. Vendor** (Desired Vendor). If you are unsure of the vendor number, enter the vendor name, address, phone, email and contact name information in the Header Notes section of the req. by expanding the Header section.

6. Click Enter  to validate your information
7. Click **Save** . The system message "Purchase requisition xxxxxxxx created" is displayed in the status bar.

Adding Attachments

Always add attachments in the display mode ME53N.

1. Execute transaction ME53N.
2. Click the **Other requisitions** icon. 
3. Enter the requisition number to create the attachment against and click **Other Document**.
4. Click on the left hand side of the **Services for Object** Icon. 
5. Click on the **Create** Icon  and then select **Create Attachment**.
6. Locate the file to be attached, **select the file** and then click on **Open** to attach document to req.
7. Click on the **Attachment List**  icon to see the document recently attached.

Notes:

- Anyone can make changes or delete attachments regardless of who uploaded them
- Attachments to purchasing documents will not print when the document is printed
- Most document formats can be added as an attachment (doc, xls, jpeg, txt, pdf, ppt, msg)
- There is no indicator that an attachment exists when displaying a purchasing document without drilling into the attachment area. Therefore it is suggested that a note be typed in the Header note field to indicate that an attachment exists (e.g. Quote attached)

To check the status of a requisition:

1. Execute transaction ME53N.
2. Click on the **Status** tab in the Item Detail section. If it is not released (approved), it will show as blocked. If it is released, it will show as unblocked. If a purchase order is created, you will see the PO number. You can display the PO document by double-clicking on the document number.
3. For blocked requisitions, click the **Release strategy** tab to view the required approvals. A check mark indicates approval while a triangle indicates an approval that is still required.

Code	Description	Processor	Sta...
GJ	Grant Program 15	Jolly RAMAKRISH...	✓
V5	VP Student Affairs	VALERIE EPPS	⚠

USER Parameters (creating default values)

Setting up default values for particular fields in the requisition can save you time when creating a req. Default values set up using Parameter IDs will apply to most screens in SAP

1. Execute transaction SU3, or
Use menu path: System> User profile > Own data
2. Click on the **Parameters** tab
3. Scroll down, if necessary, to view blank lines
4. Enter the Parameter ID (or PID) shown below and the value that you want to default.
5. These are default values that fill in automatically. If you need to override them for a particular transaction, just type over the information.

PID	Description	Value
WRK	Plant	50 (Lock Haven)
ZGR	Goods Recipient	Your "delivery person"
ZUP	Unloading Point	Your "delivery location"
EKO	Purchasing Org.	LOCL
EKG	Purchasing Group	Check with Procurement

REQUISITIONING TRANSACTIONS

ME51N: Create a requisition
 ME52N: Change a requisition
 ME53N: Display a requisition
 ME5A: Display a list of requisitions