



Requisition Processing Guide

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Transaction Code Quick Reference

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Setting Your Plant

Setting Parameter Defaults (Field Default Values)

1. Follow the menu path:
System → **User profile** → **Own Data** (or enter SU3 in the command field), which will take you to the *Maintenance* screen.

Note: going to the Maintenance screen will open up a second session of R/3.

On the *Maintenance* screen:

2. Click on the **Parameters** tab (the third of three tabs in the middle of the screen).
3. Click once or twice on the inside scroll bar on the Parameters tab to find empty spaces.
4. Enter **WRK** in the **Parameters** column.
5. Enter your **Plant** value (i.e., DUKE, DHSP, etc.) in the **Value** column.
6. Click on the  **Save** button. If you wish, close out the second session of R/3.
7. By setting your Plant value in the Parameters, your plant should now default in on the requisition screens, saving you keystrokes.

New Create a Purchase Requisition (without the Material Master)—ME51

The requisitioning process begins when a need for a material or service is identified. You can use the Material Master for many items or services. However, you may not find the material or service you want in the Material Master. If not, you will need to create a requisition without the Material Master. Information such as a short text description of the material or service, the quantity, purchasing group, unit of measure, estimated net price, and the GL account will need to be entered for items in a purchase requisition that does not use the Material Master.

A purchase requisition is a request for goods and/or services. Depending on the approval rules selected by a department, some purchase requisitions may require approval before they can be converted into purchase orders. Requisitions are:

- itemized
- may request multiple materials or services
- procured from different vendors.

When the requisition is processed into a purchase order, the R/3 system separates items and creates multiple purchase orders by vendor. Also, a number of requisitions for materials or services from the same vendor might be consolidated into a single purchase order.

New Create a Purchase Requisition (without the Material Master)—ME51

1. Key in **ME51** in the white command field on the main SAP R/3 screen and press or click **Enter**.

The *Create Purchase Requisition* screen is displayed:

The screenshot shows the SAP 'Create: Purchase Requisition: Initial Screen'. The window title is 'Purchase requisition Edit Goto Environment System Help'. The SAP logo is in the top right corner. The main area contains the following fields and options:

- Document type:** NB (with a drop-down arrow)
- Purchase requisition:** [Blank field]
- Source determination**
- Default data for items:**
 - Item category: [Blank]
 - Acct assignment cat.: X
 - Delivery date: T
 - Plant: DUKE
 - Storage Location: [Blank]
 - Purchasing Group: [Blank]
 - Material Group: [Blank]
 - Req. Tracking Number: [Blank]
 - Requisitioner: [Blank]
 - Supplying plant: [Blank]

The status bar at the bottom right shows 'PRD (1) (100) prdn00 OVR'.


2. In the **Document type** field, click on the drop-down and enter the appropriate **document type** from the options. The selections below are the most commonly used types:

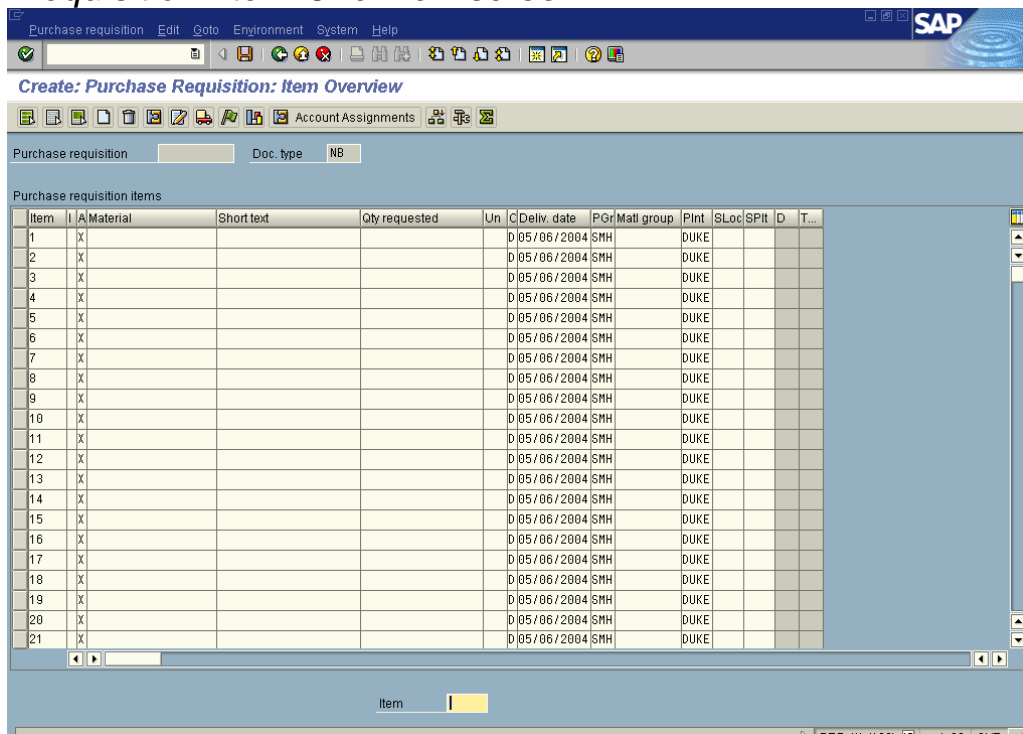
NB	for a <u>Purchase requisition</u> (used for regular purchase requisitions). This is the default.
SH	for SPECIAL HANDLING (needs Procurement Services handling i.e.: attachments)

New Create a Purchase Requisition (without the Material Master)—ME51

3. Make sure the **Source determination** box is checked. This allows the system to select a vendor, if needed.
4. In the **Acct. Assignment cat.** field, enter the **account assignment category**:


X	<u>Used for All non-asset purchases (materials for consumption).</u> This is the most commonly used selection.
R	Used for Items Goods Receipt (used when receiving activity is expected – i.e., at RCH, DRH, Clinical Labs, etc.)
Z	Used for Balance Sheet Accounts (non-depreciated assets)
<input type="checkbox"/>	left blank (used for R/3 Inventory)

5. Enter a date in the **Delivery date** field.
6. Enter a plant in the **Plant** field (e.g., DHSP or DUKE).
7. Enter a purchasing group in the **Purchasing Group** field.
8. Click on the  **Enter** button to go to the *Create: Purchase Requisition: Item Overview* screen:

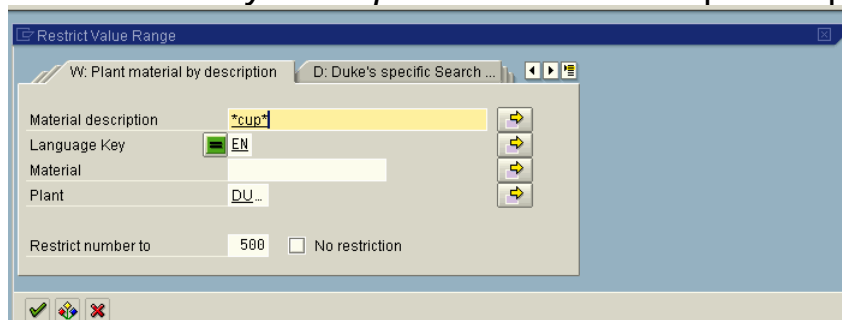



New Create a Purchase Requisition (without the Material Master)—ME51

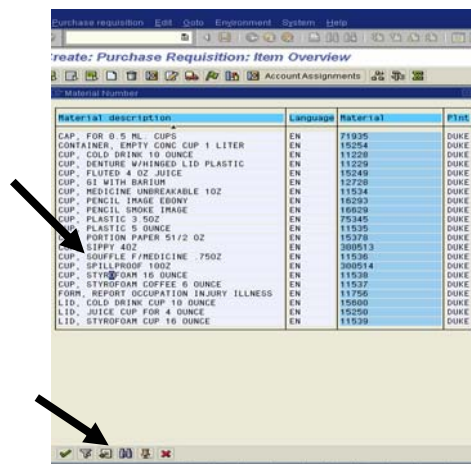
9. To search for the material in the Material Master first, click in the **Material** field and click on the drop-down box to the right to search for a **material number** from the Material Master.

*Note: The Search Help box will offer different tabs - ways of sorting for material numbers. **Select the “W” tab: Plant material by description**.* To see a list of tabs, click on the  List button.

10. Check to be sure that your Plant defaulted in the Plant field.
 11. Search for the desired material, using asterisks as wild cards on the *Plant material by description* tab – for example: *cup*.



12. To insert the item in a Personal List, click once on the item to highlight it and then click on the  **Insert in personal list** button at the bottom of the search box. The cursor will jump down one.




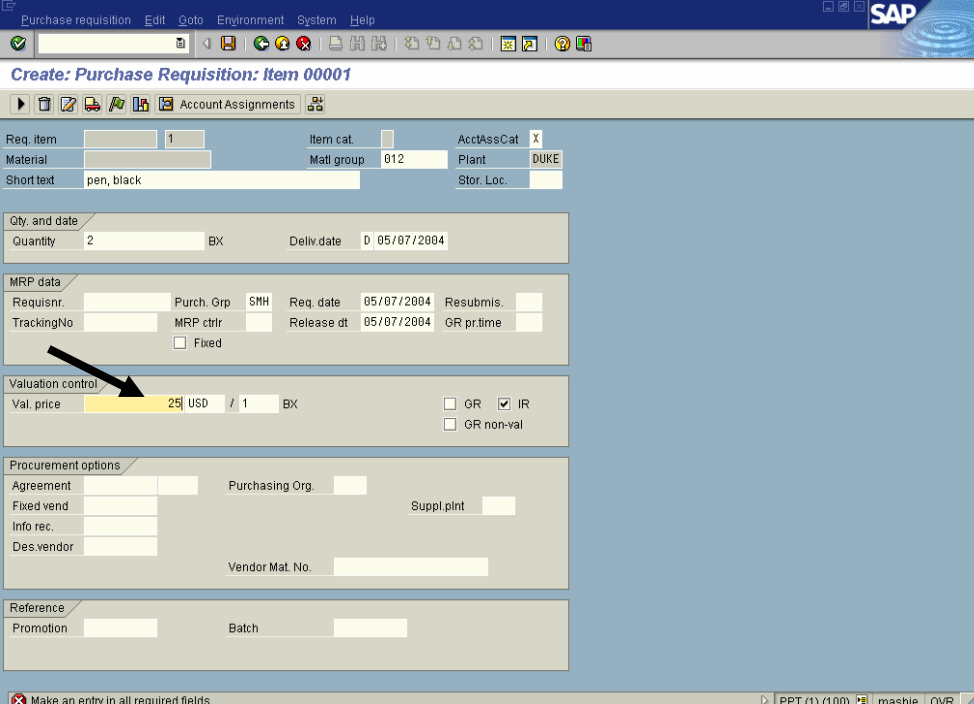
Material description	Language	Material	Plant
CAP. FOR 0.5 RL CUPS	EN	71925	DUKE
CONTAINER, EMPTY CONC CUP 1 LITER	EN	15254	DUKE
CUP, COLD DRINK 10 OUNCE	EN	11228	DUKE
CUP, DENTURE WHINNED LID PLASTIC	EN	11229	DUKE
CUP, FLUTED 4 OZ JUICE	EN	15249	DUKE
CUP, 63 WITH BARLOW	EN	12758	DUKE
CUP, MEDICINE UNBREAKABLE 10Z	EN	11534	DUKE
CUP, PENCIL IMAGE EBONY	EN	16293	DUKE
CUP, PENCIL SMOKE IMAGE	EN	16629	DUKE
CUP, PLASTIC 3 5OZ	EN	75345	DUKE
CUP, PLASTIC 5 OUNCE	EN	11525	DUKE
PORTION PAPER 5 1/2 OZ	EN	15378	DUKE
CUP, SIFFY 4OZ	EN	308513	DUKE
CUP, SOUFFLE P/MEDICINE .75OZ	EN	11536	DUKE
CUP, SPILLPROOF 10OZ	EN	308514	DUKE
CUP, STYROFOAM 16 OUNCE	EN	11538	DUKE
CUP, STYROFOAM COFFEE 6 OUNCE	EN	11537	DUKE
FORM, REPORT OCCUPATION INJURY ILLNESS	EN	11756	DUKE
LID, COLD DRINK CUP 10 OUNCE	EN	15600	DUKE
LID, JUICE CUP FOR 4 OUNCE	EN	15250	DUKE
LID, STYROFOAM CUP 10 OUNCE	EN	11539	DUKE

13. The next time you click on the drop-down in the Material field, you will see the item in your Personal Value List:

Material description	Language	Material	Plant
CUP, STYROFOAM 16 OUNCE	EN	11538	DUKE

New Create a Purchase Requisition (without the Material Master)—ME51

14. If the material is not in the Material master, type the name of the material or service in the **Short text** field. Do not use invoice numbers as descriptions or descriptions that are too general (use “**pen, black**” instead of “**office supplies**”).
15. Enter the **quantity** in the **Qty requested** field (1 for services).
16. Enter the **unit of measure** (you can click on the drop-down arrow in that box to see the choices, such as **EA, BOX**, etc.).
17. Enter the **material group** (click on the drop-down arrow).
18. Click on the **Enter** button  to display the *Create Purchase Requisition: Item 00001* screen:



The screenshot shows the SAP 'Create: Purchase Requisition: Item 00001' screen. The 'Val. price' field is highlighted in yellow and contains the value '25 USD'. A black arrow points to this field. Other visible fields include 'Req. item' (1), 'Item cat.', 'AcctAssCat' (X), 'Material', 'Matl group' (012), 'Plant' (DUKE), 'Short text' (pen, black), 'Qty. and date' (Quantity: 2 BX, Deliv. date: 05/07/2004), 'MRP data' (Requisnr., Purch. Grp, SMH, Req. date: 05/07/2004, Resubmis., TrackingNo., MRP ctrlr, Release dt: 05/07/2004, GR pr.time, Fixed), 'Valuation control' (Val. price: 25 USD / 1 BX, GR, IR, GR non-val), 'Procurement options' (Agreement, Purchasing Org., Fixed vend, Info rec., Des.vendor, Vendor Mat. No., Suppl.plnt), and 'Reference' (Promotion, Batch). The status bar at the bottom indicates 'Make an entry in all required fields'.


19. Enter the **estimated** price (ex: 100) in the Val. Price field. You will note that this is a required field for this screen. Do not put the dollar sign or decimal point - just the estimated price.

If you wish to order from a particular vendor:

20. Click in the **Des.vendor** (desired vendor) field and click on the drop-down.

New Create a Purchase Requisition (without the Material Master)—ME51

*Note: the first time you click on the dropdown in the Des. Vendor field, there will be several ways of searching. Click on 0 for **Purchasing Vendors- Ordering Addresses**.*

21. Click in the Name field (see above) and search for your desired vendor by using asterisks as wild cards (ex: *IBM*). Click on  **Enter** to display the Vendor addresses:


Group	Vendor	Name 1	Name 2	Street	City	PostalCode	Ta
ORD1	6802	IBM CORP		7100 HIGHLAND PKWY	SMYRNA	30092	
ORD1	6803	IBM CORP	EASY SERVE	3605 KNIGHT RD SUITE 9	MEMPHIS	38118	
ORD1	6804	IBM CORP	GLOBAL SERVICES	PO BOX 98880	CHICAGO	60693	
ORD1	6805	IBM CORP	GLOBAL SERVICES	3405 W DR M L KING BLVD	TAMPA	33607	
ORD1	6806	IBM CORP	AIX SUPPORT FAMILY 02 04	5 WEST KIRKWOOD BLVD	ROANOKE	76299-0001	
ORD1	6807	IBM CORP		4800 FALLS OF THE NEUSE RD	RALEIGH	27609	
ORD1	6808	IBM CORP	INS FOR ACAD TECH CONS GR	SUITE 400 2525 MERIDIAN PKWY	DURHAM	27713	
ORD1	6809	IBM CORP		PO BOX 97977	DALLAS	75397	
ORD1	6810	IBM CORP	PUBLICATIONS	PO BOX 29570	RALEIGH	27626	
ORD1	6811	IBM CORP	BLDG 203 DPT WMD DIRECT R	3039 CORNWALLIS RD	RTP	27709	
ORD1	20850	IBM CORP		PO BOX 105063	ATLANTA	30348	

Note: If you do not find your desired vendor, you can enter a note (see pages 12 and 13 for notes).

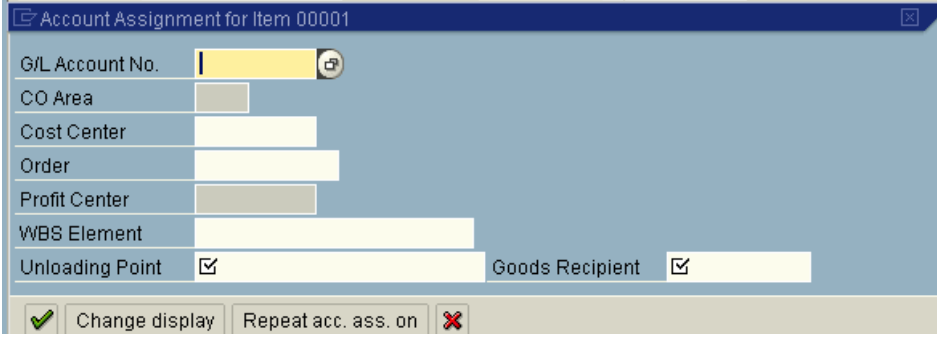
22. Enter a catalog number (if known) in the **Vendor mat. no.** field.
23. **If goods receipt is required** (and R was not selected for the Account Assignment category), place a check in the **GR** box.
Note: goods receipt entries must be made for the items received.


If goods receipt is NOT required, be sure BOTH **GR** and **GR non-val** boxes are unchecked. *The IR box should be checked.*

New Create a Purchase Requisition (without the Material Master)—ME51

24. Click on the  Enter button to display the Account Assignment for Item dialogue box.

The *Account Assignment for Item 00001* screen will be displayed:

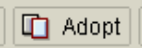


25. Enter the **General ledger (G/L) account** (search with asterisks on T if needed).
26. Enter the **Cost center** (or **WBS Element**) that is to be charged for the material in the correct field. Do not use the Order field.
27. Enter the **Unloading** point (a specific location or room).
28. Enter the **Goods recipient** (first initial and last name).
29. If all items will be charged to the same cost center, Click on the **Repeat acc. ass. on** button. If you have set up your messages to display in the middle of your screen, you will see the *Information: Account assignment data held* screen.
30. Click on the  Continue button or press Enter to display the *Delivery Address for Item 00001* screen.

New Create a Purchase Requisition (without the Material Master)—ME51

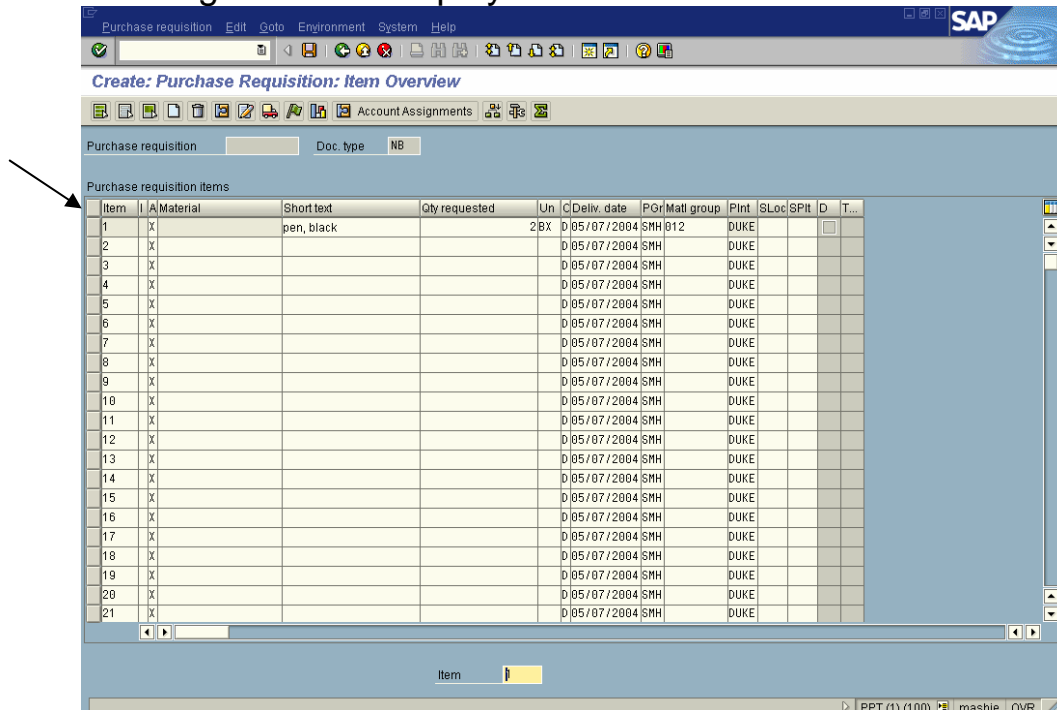
The following screen is displayed:


The screenshot shows the 'Delivery Address for Item 00001' window. At the top, there are fields for Plant (DUKE), Stor. Loc., Address, Customer, Vendor, and SC vendor. Below this is a 'Name' section with fields for Title (Duke Health Sys Duke Health Sys) and Name (Duke University). A 'Search terms' section contains 'DUKE UNIVERSITY'. The 'Street address' section includes Country (US), Region (NC), and Time zone (EST). The 'PO box address' section includes PO Box (27710) and Postal code (27710). At the bottom, there are buttons for Adopt, Reset, Repeat address on, and Repeat address off. An arrow points to the Address field.

31. Enter the Address number in the **Address** field at the upper right or select the **address** via a search (click on the dropdown and use asterisks with a single noun typed in **Name** field).
32. Double-click on the address and the SAP R/3 address number will be put into the **Address** field.
33. Press **Enter** to populate the screen. Check to see if the **Building Name** and **Address** are correct (add a room number, if necessary).
34. In a blank field under Name, put the *name of the person* who will receive the items as well as a contact *telephone number*.
35. If the address will be the same for all items on this requisition, click on the **Repeat address on** button to display the "Delivery Address Held" on the *Information* screen.
36. Click on the  **Adopt** button to display the *Create Purchase Requisition: Item Overview* screen again.

New Create a Purchase Requisition (without the Material Master)—ME51

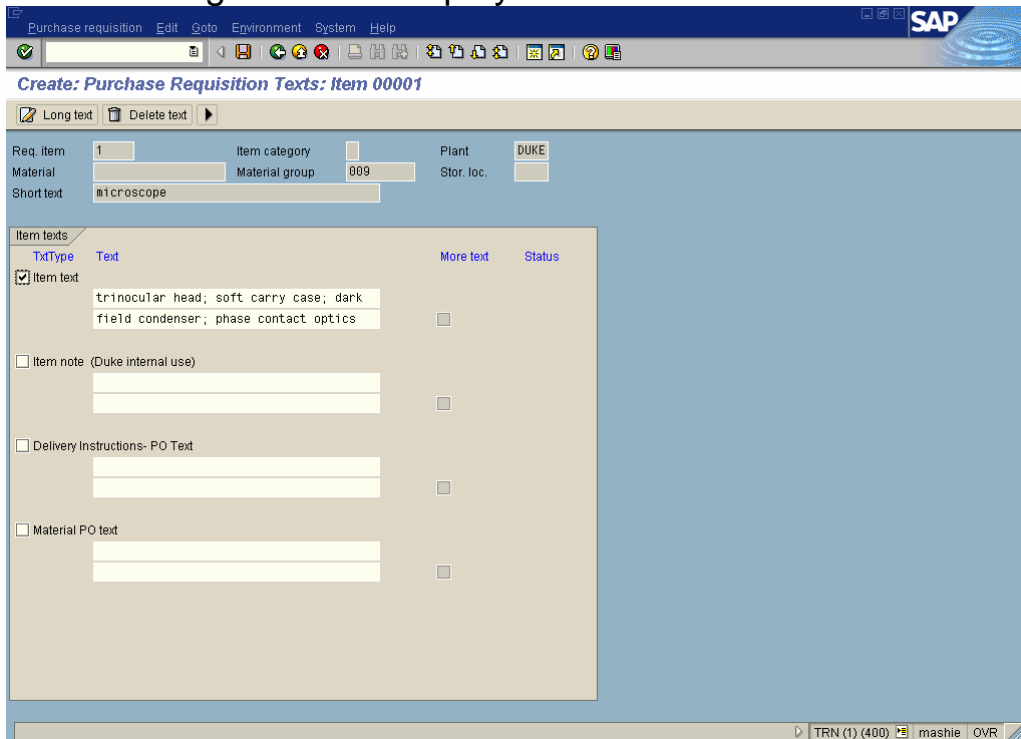
The following screen is displayed:




37. To put in a note to Purchasing or the vendor, click on the blue button(s) to the immediate left of the desired line item(s) to highlight the item(s).
38. Click on the  **Text Overview** button or press **Shift+F6** to display the *Create: Purchase Requisition Texts: Item 00001* screen.
39. Use the **Item Text** field for notes that the vendor should see.
40. If you are paying an **existing invoice**, in the **Item Text** screen, type in the words “To Pay Invoice _____ dated _____.”
41. Indicate in the **Item note (Duke Internal Use)** field if this vendor is not already in the R/3 system. Include the Vendor’s Name, Phone Number, and Vendor Fax Number. Make note of any special shipping instructions: i.e., emergencies, rush orders.
42. To type an internal note to Purchasing or Sponsored Programs, use **Item note (Duke internal use)** or the Long Text.
43. Check the boxes next to fields with notes.

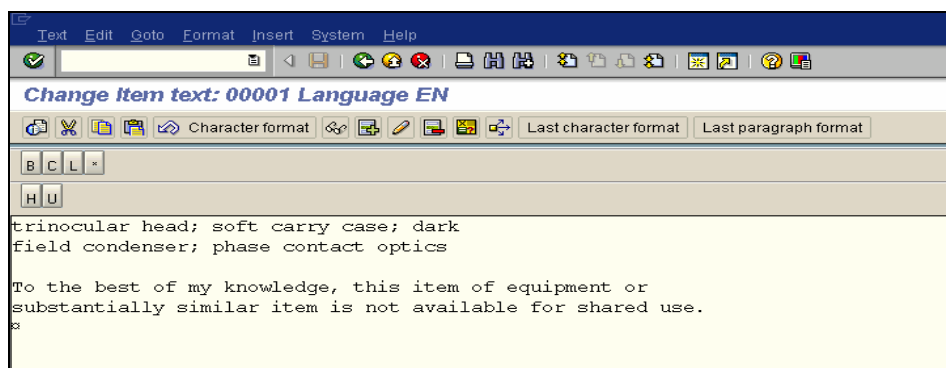
New Create a Purchase Requisition (without the Material Master)—ME51

The following screen is displayed:





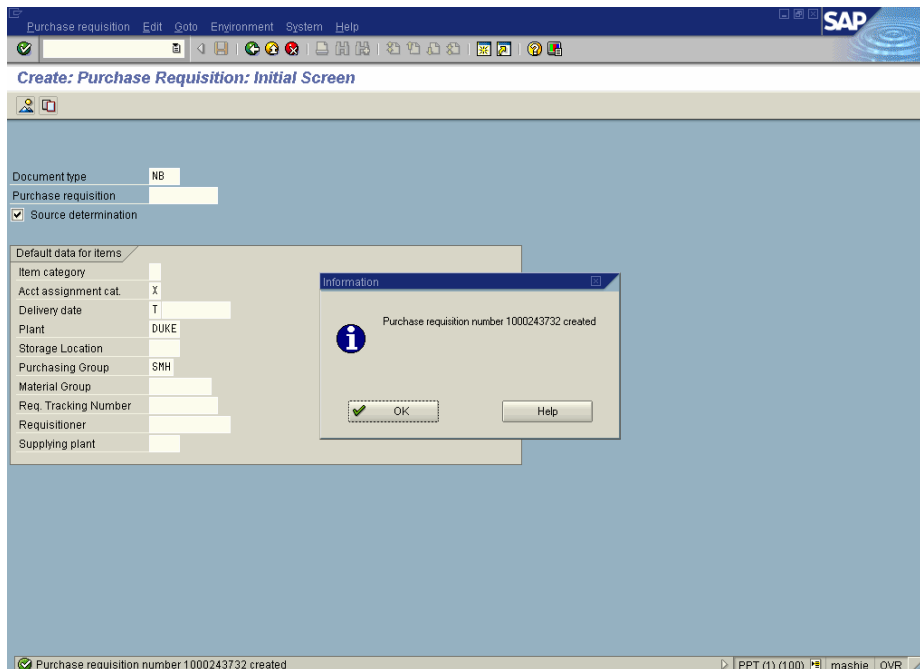
44. Click on the  **Long Text** button on the Application Toolbar to write a longer note to Sponsored Programs or to Purchasing.
45. If you are buying capital equipment (GL Account 66XXXX – over \$5000), on a Federal Sponsored Project (WBS Elements in 30X – 34X in Company Code 10) the following “certification” statement MUST be entered in the **Long Text** field.



“To the best of my knowledge, this item of equipment or substantially similar item is not available for shared use.”



New Create a Purchase Requisition (without the Material Master)—ME51

46. You may also write a note to Purchasing in one of the Text fields. For example, if the purchase is over **\$2500** or over **\$5000** for capital, you will need a justification/quote. Identify this in the Text field and fax supporting justification or quotes documentation to: **684-4344**. Be sure to reference your requisition number on the fax and include a fax cover sheet with the name of the person to whom you are sending the back-up documentation.
47. Click on the  **Back** button or press **F3** to display the *Create: Purchase Requisition: Item Overview* screen.
48. Click on the  **Save** button to display the *Information* screen with an SAP R/3 generated purchase requisition number. Be sure to reference this number when you send any faxes:



49. Click on the  **OK** button or press Enter to display the *Create: Purchase Requisition: Initial Screen*.
50. Click on the  **Exit** button or press **Shift+F3** until the initial SAP R/3 System screen is displayed.

Create a Purchase Requisition using a Material Master—ME51

The requisitioning process begins when a need for a material or service is identified. A purchase requisition is created, which includes the material, requested quantity, cost center to be charged and the required delivery date.

If you are using the Material Master, information such as the unit of measure (box, etc.), net price, storage location, and account assignment (GL account) defaults from the material master record when a purchase requisition for a material or service with a material master record is created. The purchase requisition is released and a purchase order is created. If you are not using the Material Master, you will need to provide some of the above information.

A purchase requisition is a request for goods and/or services. Depending on the approval rules selected by a department, some purchase requisitions may require approval before they can be converted into purchase orders.

Requisitions are:

- itemized
- may request multiple materials or services
- may be procured from different vendors.

When the requisition is processed into a purchase order, the R/3 system separates items and creates multiple purchase orders by vendor. Separate requisitions for materials or services from the same vendor can be consolidated into one purchase order. You can track your purchase requisition to see if it has been approved and/or turned into a purchase order. You can also see all the open (and closed, if necessary) purchase requisitions that have been charged to a particular cost center.

The transactions in this Step-by-Step guide are designed to walk you through the basic steps in creating, copying, displaying, changing, approving and looking up requisitions. For more advanced courses, please see the SAP R/3 curriculum online at www.r3.duke.edu.

Create a Purchase Requisition using a Material Master—ME51

Key **ME51** in the transaction field and press **Enter**.

The following screen is displayed:

The screenshot shows the SAP 'Create: Purchase Requisition: Initial Screen' window. The window title is 'Purchase requisition Edit Goto Environment System Help' and the SAP logo is in the top right. The main area shows a form with the following fields:

- Document type: NB
- Purchase requisition: [empty]
- Source determination:
- Default data for items:
 - Item category: [empty]
 - Acc. assignment cat.: X
 - Delivery date: T 01/16/2003
 - Plant: DUKE
 - Storage location: [empty]
 - Purchasing group: SMH
 - Material group: [empty]
 - Req. tracking number: [empty]
 - Requisitioner: [empty]
 - Supplying plant: [empty]

1. In the **Document Type** field, click and select from the valid options below:


NB	<u>for a Purchase requisition (used for regular purchase requisitions and is the default)</u>
SH	for SPECIAL HANDLING (needs Procurement Services handling i.e.: attachments)

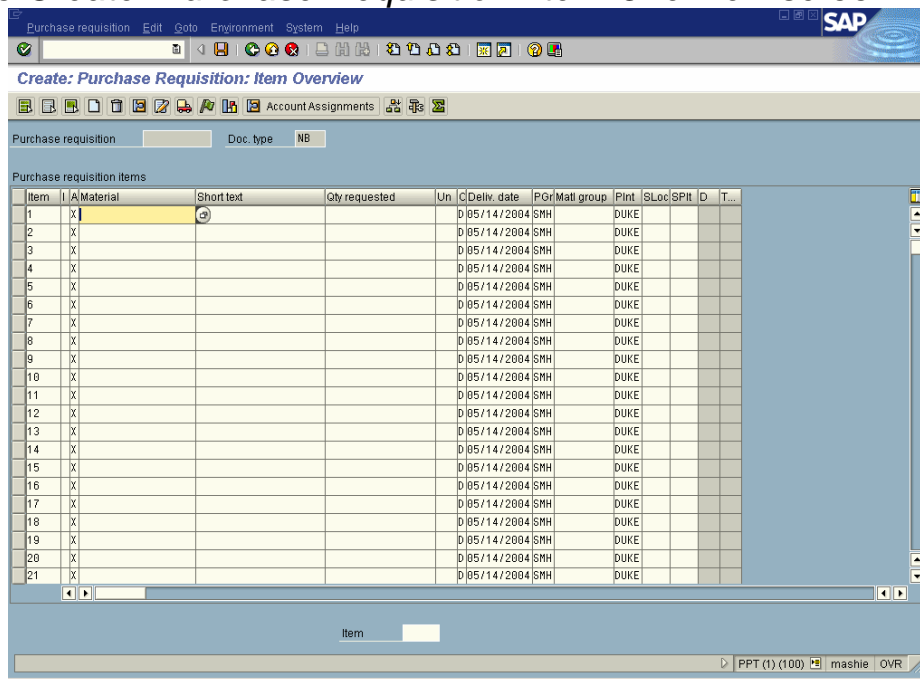
2. Make sure that the **Source determination** box is checked. This will allow the system to select a vendor.

Create a Purchase Requisition using a Material Master—ME51

3. Enter the appropriate **Account Assignment** category from the valid entries (either X or R should default, depending on the area's goods receipt policy):

X	For All non-asset purchases (materials for consumption)
R	For Items Goods Receipt (used when receiving activity is expected and performed consistently. This is the default for DRH and RCH)
Z	For Balance Sheet Accounts (non-depreciated assets)
A	for Asset (reserved for future use)
<input type="checkbox"/>	left blank (used for R/3 Inventory)

4. Enter the **Delivery Date**.
5. Select the **Plant** (appropriate facility – i.e., DHSP, DUKE, etc.).
6. Select the **Purchasing Group** from the drop-down box. (you will need to know your department's Purchasing group).
7. Click on the  **Enter** button. If you get a delivery date warning, click **OK** and hit **Enter** on the keyboard several times to display the *Create: Purchase Requisition: Item Overview* screen:




Item	Material	Short text	Qty requested	Un	C/Deliv. date	PGR/Mat group	Plant	SLoc	SPIT	D	T...
1	X				D 05/14/2004	SMH	DUKE				
2	X				D 05/14/2004	SMH	DUKE				
3	X				D 05/14/2004	SMH	DUKE				
4	X				D 05/14/2004	SMH	DUKE				
5	X				D 05/14/2004	SMH	DUKE				
6	X				D 05/14/2004	SMH	DUKE				
7	X				D 05/14/2004	SMH	DUKE				
8	X				D 05/14/2004	SMH	DUKE				
9	X				D 05/14/2004	SMH	DUKE				
10	X				D 05/14/2004	SMH	DUKE				
11	X				D 05/14/2004	SMH	DUKE				
12	X				D 05/14/2004	SMH	DUKE				
13	X				D 05/14/2004	SMH	DUKE				
14	X				D 05/14/2004	SMH	DUKE				
15	X				D 05/14/2004	SMH	DUKE				
16	X				D 05/14/2004	SMH	DUKE				
17	X				D 05/14/2004	SMH	DUKE				
18	X				D 05/14/2004	SMH	DUKE				
19	X				D 05/14/2004	SMH	DUKE				
20	X				D 05/14/2004	SMH	DUKE				
21	X				D 05/14/2004	SMH	DUKE				

Create a Purchase Requisition using a Material Master—ME51

8. Click in the **Material** field of line item1; then click on the drop-down box to the right to search for a **material number** from the Material Master.


Note: The first time you click on the search, the Restrict Value Range box will offer several tabs for ways of searching for material numbers. Select “W”. The W should default.

9. Search for the desired material, using asterisks as wild cards on the *Plant material by description* screen – for example: *cup*.


10. Click on the  green check to see a list of materials:


Material description	Language	Material	Plant
CAP. FOR 0.5 ML. CUPS	EN	71935	DUKE
CONTAINER, EMPTY CONC CUP 1 LITER	EN	15254	DUKE
CUP, COLD DRINK 10 OUNCE	EN	11229	DUKE
CUP, DENTURE W/HINGED LID PLASTIC	EN	11229	DUKE
CUP, FLUTED 4 OZ JUICE	EN	15249	DUKE
CUP, GI WITH BARIUM	EN	12728	DUKE
CUP, MEDICINE UNBREAKABLE 10Z	EN	11534	DUKE
CUP, PENCIL IMAGE EBONY	EN	16293	DUKE
CUP, PENCIL SMOKE IMAGE	EN	16629	DUKE
CUP, PLASTIC 3 5OZ	EN	75345	DUKE
CUP, PLASTIC 5 OUNCE	EN	11535	DUKE
CUP, PORTION PAPER 51/2 OZ	EN	15378	DUKE
CUP, SIPPY 4OZ	EN	300513	DUKE
CUP, SOUFFLE F/MEDICINE .75OZ	EN	11536	DUKE
CUP, SPILLPROOF 10OZ	EN	300514	DUKE
CUP, STYROFOAM 16 OUNCE	EN	11539	DUKE
CUP, STYROFOAM COFFEE 6 OUNCE	EN	11537	DUKE
FORM, REPORT OCCUPATION INJURY ILLNESS	EN	11756	DUKE
LID, COLD DRINK CUP 10 OUNCE	EN	15600	DUKE
LID, JUICE CUP FOR 4 OUNCE	EN	15250	DUKE
LID, STYROFOAM CUP 16 OUNCE	EN	11539	DUKE

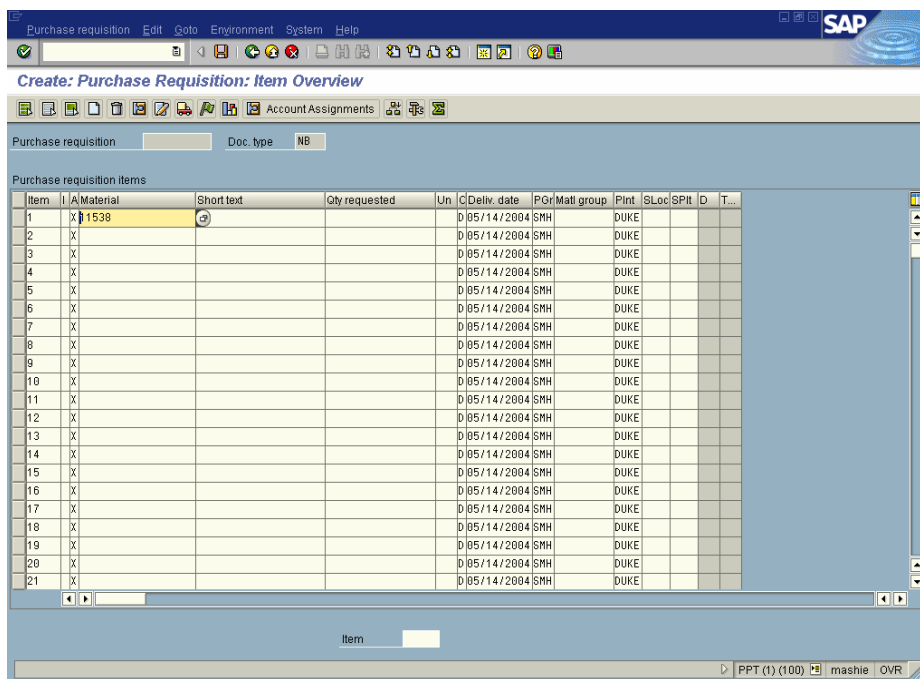
You can create a personal list of materials by using these steps:

11. Click **once** on the desired material to highlight it and click on the  **Insert in personal list** button at the bottom of the screen or press **F6**. The next time you click on the dropdown, the Personal

Create a Purchase Requisition using a Material Master—ME51

Values list will display. If you are ordering an item not on your list, click on the  **All Values** button to get back to the **W** search.


12. Note that the cursor jumped down. The next material in the list is now highlighted. To select the material you want for this current order, click it again to highlight it. Then double-click on it or click on the  **Copy** button or press **Enter** to display the *Create: Purchase Requisition: Item Overview* screen:



Item	Material	Short text	Qty requested	Un	C/Deliv. date	PGr/Matl group	PInt	S/Loc/SPit	D	T...
1	X 1538				D 05/14/2004	SMH	DUKE			
2	X				D 05/14/2004	SMH	DUKE			
3	X				D 05/14/2004	SMH	DUKE			
4	X				D 05/14/2004	SMH	DUKE			
5	X				D 05/14/2004	SMH	DUKE			
6	X				D 05/14/2004	SMH	DUKE			
7	X				D 05/14/2004	SMH	DUKE			
8	X				D 05/14/2004	SMH	DUKE			
9	X				D 05/14/2004	SMH	DUKE			
10	X				D 05/14/2004	SMH	DUKE			
11	X				D 05/14/2004	SMH	DUKE			
12	X				D 05/14/2004	SMH	DUKE			
13	X				D 05/14/2004	SMH	DUKE			
14	X				D 05/14/2004	SMH	DUKE			
15	X				D 05/14/2004	SMH	DUKE			
16	X				D 05/14/2004	SMH	DUKE			
17	X				D 05/14/2004	SMH	DUKE			
18	X				D 05/14/2004	SMH	DUKE			
19	X				D 05/14/2004	SMH	DUKE			
20	X				D 05/14/2004	SMH	DUKE			
21	X				D 05/14/2004	SMH	DUKE			

13. This will put a material item number in the **Material** field. Tab over two fields to the **Qty requested** field and enter the **quantity**.

Note: You may have to check with Purchasing to find out if the material you are ordering comes in boxes, sleeves, or single “each” units. However, it is not necessary to enter anything in the Unit field or the Matl group field when ordering from the Material Master.

14. Click on the  **Enter** button or press **Enter** (you may have to press twice) to display the *Account Assignment for Item* screen.

Create a Purchase Requisition using a Material Master—ME51

The following screen is displayed with the GL account defaulted:

The screenshot displays the SAP ME51 interface for creating a purchase requisition. The main window title is "Create: Purchase Requisition: Item 00001". The "Account Assignment for item 00001" pop-up window is active, showing the following data:

GL account	646500
Controlling area	DUKE
Cost center	4313030
Order	
Profit center	
WBS element	
Unloading point	237 Social Sciences
Goods recipient	R U Ready


Below the pop-up, the "Procurement options" section includes fields for Agreement, Fixed vend (25428), Info rec. (5300002258), Purchasing org. (DUKE), Order unit, and Suppl.plnt. The "Reference" section includes Promotion and Batch fields.

15. Enter the **Cost center** (or **WBS Element**) that is to be charged for the material in the correct field. Do not use the **Order** field.
16. Enter the unloading point in the **Unloading point** field (this should be a specific location, such as Room 2468).
17. Enter the first initial and last name of the goods recipient in the **Goods recipient** field.
18. If all items will be charged to the same cost center, Click on the **Repeat acc. ass. on** button. If you have set up your messages to display in the middle of your screen, you will see the *Information: Account assignment data held* screen.
19. Press **Enter** or click on the **Continue** button to display the *Delivery Address for Item* screen.

Create a Purchase Requisition using a Material Master—ME51

The following screen is displayed:


Delivery Address for Item 00001

Plant Address 


Stor. Loc. Customer

Vendor SC vendor

Name

Title 

Name



Search terms


Search term 1/2

Street address

Street/House number

Postal code/City


Country Region

Time zone 

PO box address

PO Box

Postal code

Company postal code 


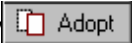
Adopt Reset Repeat address on Repeat address off

20. At the upper right on the screen, enter the address code number in the **Address** field. If you don't know the address number, you can use a match code search with asterisks (see next steps).
21. To search for a number, click in the **Address** field and click on the drop-down. Use asterisks and a single noun in the **Name** field to search— the field is not case-sensitive (example: *Biology*).
22. If the delivery address is the same for all items being ordered, click on the **Repeat address on** button to display the *Information: delivery address held* screen:

Information

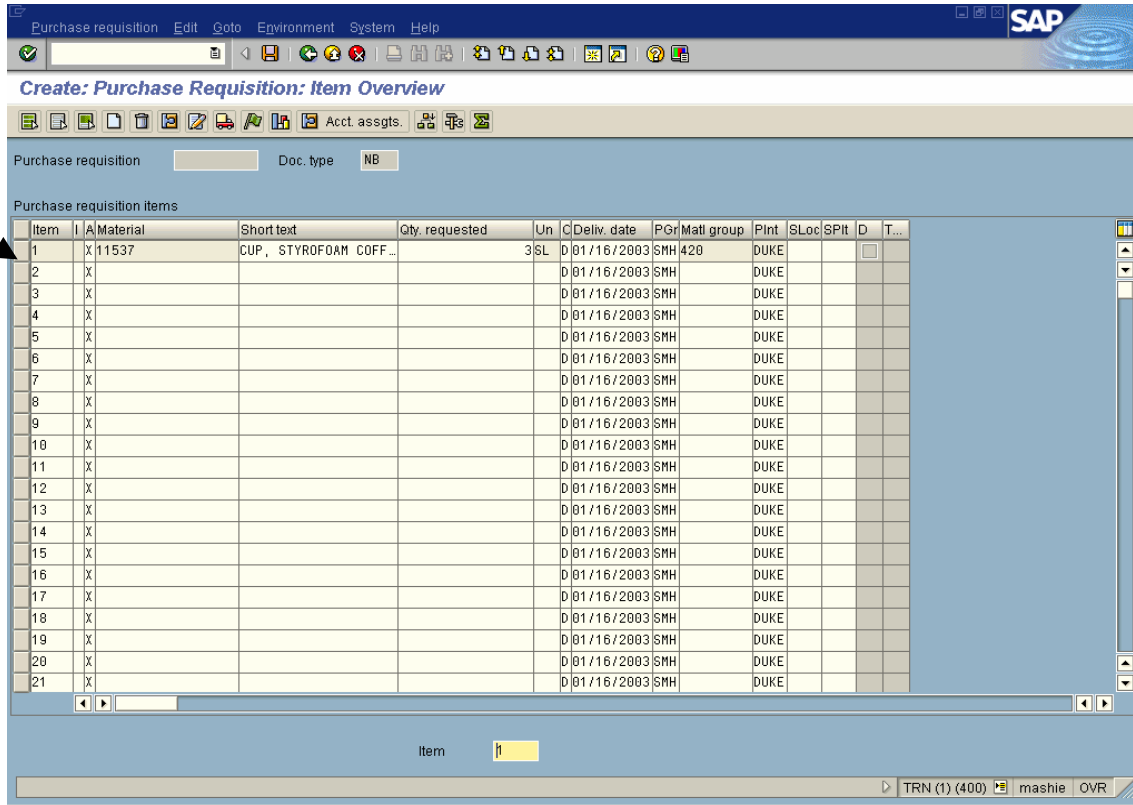
 Delivery address held



23. Click on the  **Continue** button on the Information screen.
24. Click on the **Adopt** button or press **F8** to display the *Item Overview* 

Create a Purchase Requisition using a Material Master—ME51

The following screen is displayed:





Purchase requisition: Doc. type: NB

Purchase requisition items

Item	A	Material	Short text	Qty. requested	Un	C	Deliv. date	PGr	Matl group	Plnt	SLoc	SPit	D	T...
1	X	11537	CUP, STYROFOAM COFF...		3	SL	D 01/16/2003	SMH	420	DUKE				
2	X						D 01/16/2003	SMH		DUKE				
3	X						D 01/16/2003	SMH		DUKE				
4	X						D 01/16/2003	SMH		DUKE				
5	X						D 01/16/2003	SMH		DUKE				
6	X						D 01/16/2003	SMH		DUKE				
7	X						D 01/16/2003	SMH		DUKE				
8	X						D 01/16/2003	SMH		DUKE				
9	X						D 01/16/2003	SMH		DUKE				
10	X						D 01/16/2003	SMH		DUKE				
11	X						D 01/16/2003	SMH		DUKE				
12	X						D 01/16/2003	SMH		DUKE				
13	X						D 01/16/2003	SMH		DUKE				
14	X						D 01/16/2003	SMH		DUKE				
15	X						D 01/16/2003	SMH		DUKE				
16	X						D 01/16/2003	SMH		DUKE				
17	X						D 01/16/2003	SMH		DUKE				
18	X						D 01/16/2003	SMH		DUKE				
19	X						D 01/16/2003	SMH		DUKE				
20	X						D 01/16/2003	SMH		DUKE				
21	X						D 01/16/2003	SMH		DUKE				


Item:

TRN (1) (400) mashie OVR

25. Click on the blue button(s)  to the immediate left of the desired line item(s) to highlight the entire line.
26. Click on the **Details** button  to display the *Create: Purchase Requisition: Item NNNN* screen.

Create a Purchase Requisition using a Material Master—ME51


The following screen is displayed:

27. **If goods receipt is required** (and **R** was not selected as the Accounting Assignment category on the initial Requisition screen), place a check in the **GR** box.
28. If goods receipt is **NOT required**, be sure BOTH **GR** and **GR non-val** boxes are unchecked.
Note: Invoices will not be paid if the GR box is checked and goods receipt entries are not made for the items received.
29. Press **Enter** or click on the  **Enter** button to display the *Item Overview* screen.


Create a Purchase Requisition using a Material Master—ME51


The following screen is displayed:

Item	A Material	Short text	Qty requ...	Un	C Deliv. date	PGr/Matt group	Plnt	SLoc	SPIT	D	MPN material	T...
1	X 11538	CUP, STYROFOAM 16 OUNCE	3	SL	D 05/14/2004	SMH 420	DUKE					
2	X				D 05/14/2004	SMH	DUKE					
3	X				D 05/14/2004	SMH	DUKE					
4	X				D 05/14/2004	SMH	DUKE					
5	X				D 05/14/2004	SMH	DUKE					
6	X				D 05/14/2004	SMH	DUKE					
7	X				D 05/14/2004	SMH	DUKE					
8	X				D 05/14/2004	SMH	DUKE					
9	X				D 05/14/2004	SMH	DUKE					
10	X				D 05/14/2004	SMH	DUKE					
11	X				D 05/14/2004	SMH	DUKE					
12	X				D 05/14/2004	SMH	DUKE					
13	X				D 05/14/2004	SMH	DUKE					
14	X				D 05/14/2004	SMH	DUKE					
15	X				D 05/14/2004	SMH	DUKE					
16	X				D 05/14/2004	SMH	DUKE					
17	X				D 05/14/2004	SMH	DUKE					
18	X				D 05/14/2004	SMH	DUKE					
19	X				D 05/14/2004	SMH	DUKE					
20	X				D 05/14/2004	SMH	DUKE					
21	X				D 05/14/2004	SMH	DUKE					

30. Click on the  **Save** button to display the *Information* screen:


25. Notice that you will get an SAP R/3 generated document number. You may record it or display it in the system later.

26. Click on the  **OK** button or press **Enter** to display the *Create: Purchase Requisition: Initial* screen.

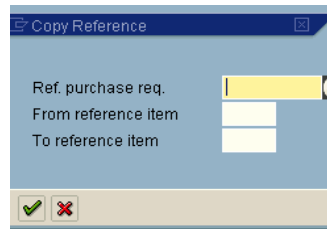
27. Click on the  **Exit** button or press **Shift+F3** until the initial *SAP R/3 System* screen is displayed.

Copy a Purchase Requisition—ME51

You may order the same items every week or month and wish to copy a previous requisition, just changing the dates and quantities.





To copy a previously used requisition, key **ME51** in the command field on the main SAP R/3 screen and click on the  **Enter** or press Enter.

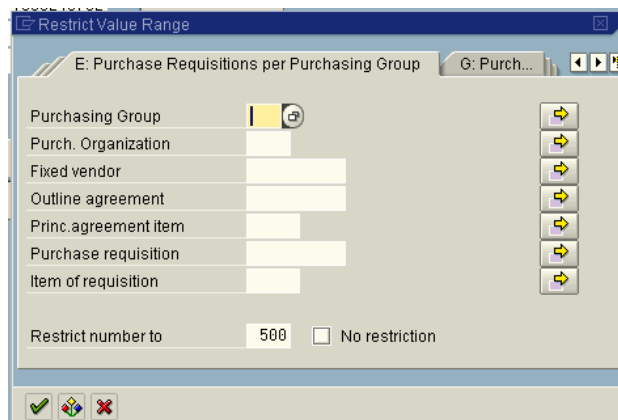
1. Click on the **Purchase Requisition** button  or press **F6** to display the *Copy Reference Dialog* box as shown below:



3. In the **Ref. Purchase Req.** field, enter the number of the purchase requisition you wish to copy.

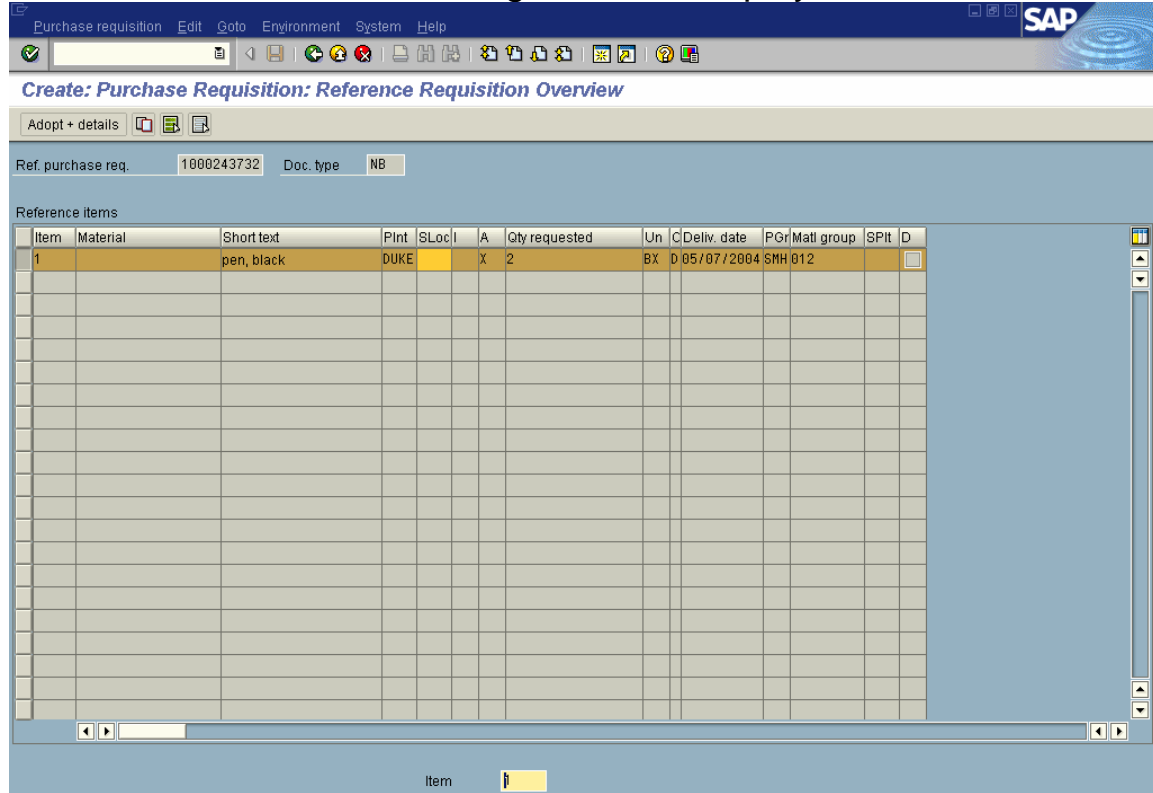
Note:





*If you need to search for your purchase requisition number, click on the drop-down in the **Ref. Purchase Req.** field. In the Search Help box, use the  Forward or  Back buttons to select tab **E Purchase Requisitions per Purchasing Group**. Enter your in the Purchasing Group field and click on the **Continue/ Enter**  button to display all purchase requisitions placed by your purchasing group. Double-click on the correct number and click on  **Enter** or press **Enter** to display the Create Purchase Requisition: Reference Requisition Overview screen.*



Copy a Purchase Requisition—ME51

The following screen is displayed:





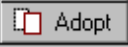

- Click on the  blue button(s) to the left of each item you wish to copy to the new requisition. This will highlight the line.
- To copy all items, click on the  **Select All** button. If you wish to deselect the items, click on the  **Deselect All** button.
- Click on the **Adopt + Details** button on the application toolbar.
- Click on the  **Enter** button or press **Enter** if you get a message asking if the delivery date can be met.
- The *Create Purchase Requisition: Item 00001* screen will appear, showing your first item to copy.

Copy a Purchase Requisition—ME51

The screenshot displays the SAP ME51 transaction screen for creating a purchase requisition. The title bar reads 'Create: Purchase Requisition: Item 00001'. The main area is divided into several sections:

- Req. item:** 1
- Material:** pen, black
- Short text:** pen, black
- Item cat.:** (empty)
- Matl group:** 012
- Plant:** DUKE
- Stor. Loc.:** (empty)
- AccAssCat:** X
- Qty. and date:** Quantity 2 BX, Deliv. date 05/14/2004
- MRP data:** Requisnr. (empty), Purch. Grp SMH, Req. date 05/10/2004, Resubmis. (empty), TrackingNo (empty), MRP ctrlr (empty), Release dt 05/10/2004, GR pr.time (empty), Fixed (checkbox)
- Valuation control:** Val. price 25.00 USD / 1 BX, GR (checkbox), IR (checked), GR non-val (checkbox)
- Procurement options:** Agreement (empty), Purchasing Org. (empty), Fixed vend (empty), Info rec. (empty), Des. vendor 2036, Vendor Mat. No. (empty), Suppl. pint (empty)
- Reference:** Promotion (empty), Batch (empty)

The status bar at the bottom shows 'PPT (1) (100) mashie OVR'.

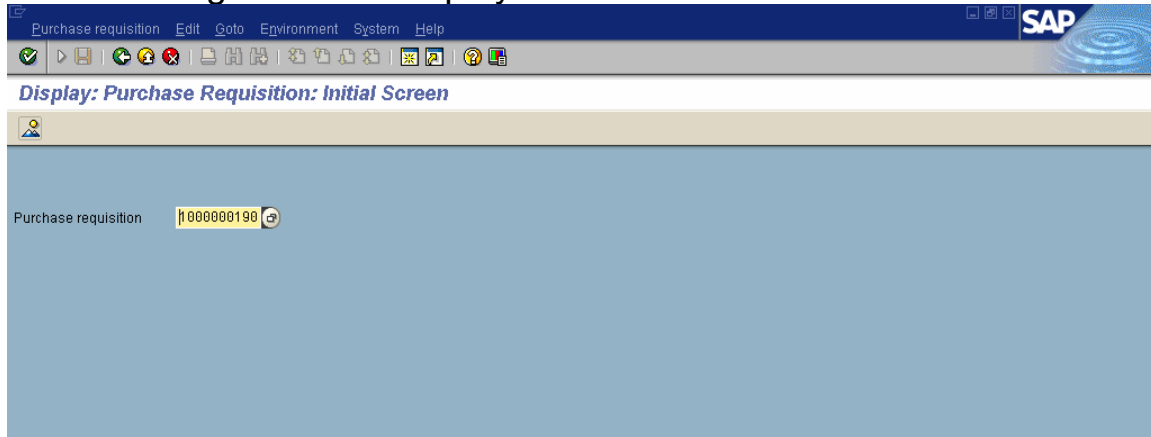
7. Make changes to the quantity, if necessary.
8. Change the delivery date to the new delivery date.
9. Check the cost center or WBS element to be charged by clicking on the  **Account Assignment** button.
10. Click on **Repeat Acc Ass On** if all new items will be charged to the same account.
11. Click on the  **Delivery Address** button to display the *Delivery Address for Item 00001* screen.
12. Make any changes needed to the address.
13. If all items are being delivered to the same address, click on **Repeat Address On**.
14. Click on the  **Adopt** button.
15. You may add materials to this requisition by clicking on the next material fields and entering new items.
16. When you have finished, click on the  **Save** button to save your requisition and record the number if you wish.


Display a Purchase Requisition—ME53

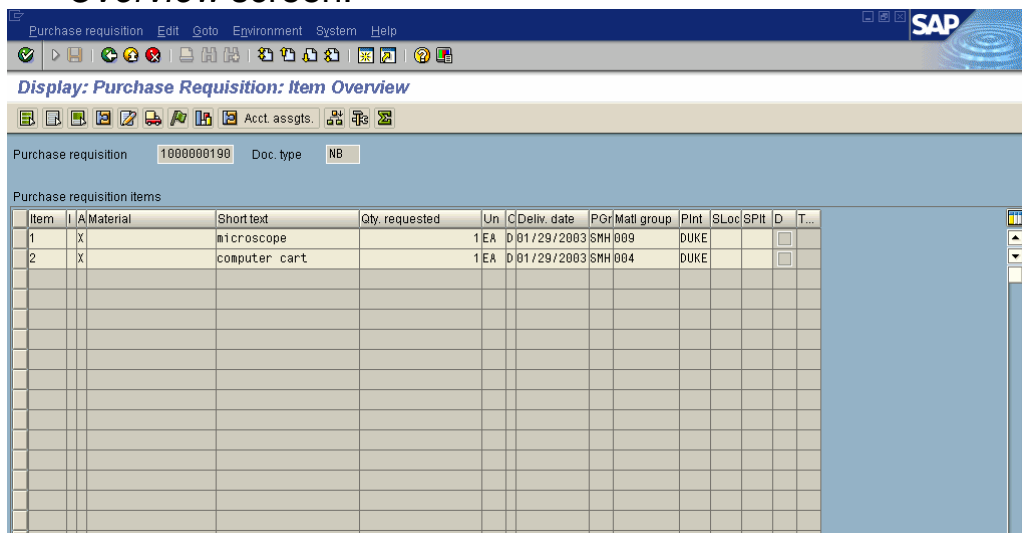
After a purchase requisition has been created, details may be reviewed by displaying the requisition. Any changes should be made before any approvals or a corresponding purchase order is created.


Enter the transaction code **ME53** in the command field on the User Menu.

The following screen is displayed:




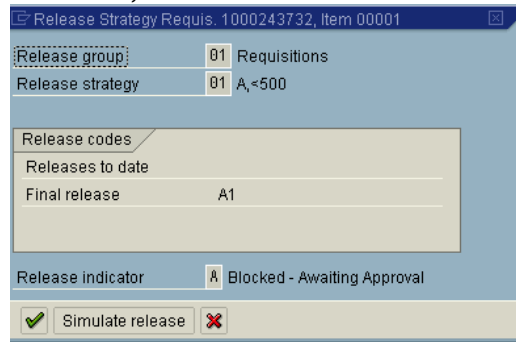
1. Enter the **Purchase requisition** number.
2. Click on the  **Enter** button or press **Enter** to display the *Item Overview* screen:



3. Click on the button(s) to the immediate left of the desired line item(s).
4. Click on the  **Details** button to display the *Item* screen.

Display a Purchase Requisition—ME53

7. To see what the release strategy is for this requisition, click on the  **Release strategy** button to display the *Release Strategy Requis. NNNNNNNNN, Item* screen:



Release group: 01 Requisitions
 Release strategy: 01 A, <500

Release codes

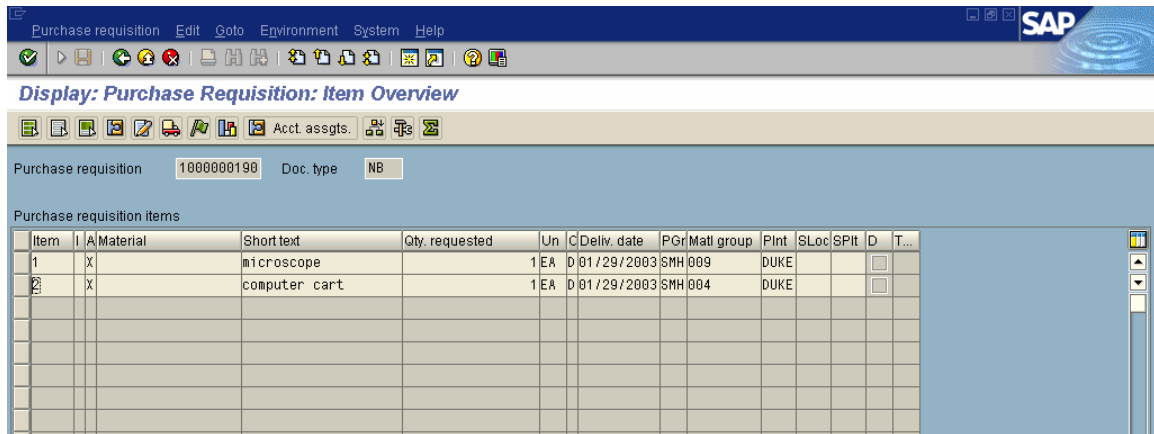
Releases to date

Final release: A1

Release indicator: A Blocked - Awaiting Approval

Simulate release


8. Click on the  **Continue** button to display the *Item Overview* screen:



Purchase requisition: 1000000190 Doc. type: NB

Purchase requisition items

Item	Material	Short text	Qty. requested	Un	C	Deliv. date	PG	Matl group	PInt	S	Loc	S	P	It	D	T...
1	X	microscope		1	EA	D 01/29/2003	SMH	009	DUKE							
2	X	computer cart		1	EA	D 01/29/2003	SMH	004	DUKE							

9. Click on the button(s) to the immediate left of the line item(s).
10. To see if a purchase requisition has been turned into a purchase order, click on the  **General statistics** button (or press Shift + F5) to display the *Purchase Requisition Statistics: for Item* screen.

Display a Purchase Requisition—ME53

The following screen is displayed:

Display: Purchase Requisition Statistics: for Item 00001

Account Assignments

Requisition item: 1

Material: pen, black

Item category: Standard

Acct. assign. cat.: X All non-asset prchs

Plant: DUKE Duke University

Storage Location:

Administrative data

Creation ind.: R Created manually Created by: JTUCKER

Processing stat.: N Not processed Changed on: 05/07/2004

"Fixed" ind. No. resubmiss.: 0

Release ind.: A Blocked - Awaiting Appr... Last resubmiss.:

Rel. strategy: 01 Total value: 50.00 USD

Order statistics

Order quantity: 0 BX

Purchase order: 0 PO date:

MRP data

Shortage: 0 BX MRP ctrlr: Reserv.No.: 0

Pind delay time: 0 SetReserNo: 0

PPT (1) (100) mashie OVR

Note: *If the requisition has turned into a purchase order, the Order Statistics fields will be filled in with the Order quantity, Purchase Order number, and the Purchase Order date.*

11. Follow the menu path given below to display the *Changes to Purchase Requisition NNNNNNNNNN Item* screen:


Goto → Statistics → Changes

Display a Purchase Requisition—ME53

The following screen is displayed:

Person resp.	Date	Time	Transaction	Change	document
Doc. header	1000000190				

Person resp.	Date	Time	Transaction	Change	document
Item	00001				
JTUCKER	01/29/2003	14.04.25	ME52		198836
LFDAT Item delivery date Changed					
Old: 01/29/2003					
New: 02/10/2003					
MENGE Purchase requisition quantity Changed					
Old: 1.000 EA					
New: 2.000 EA					
Acct. assgt 01					
JTUCKER	01/29/2003	14.04.25	ME52		198836
MENGE Purchase requisition quantity Changed					
Old: 1.000 EA					
New: 2.000 EA					

12. Click on the  **Back** button to display the *Item Overview* screen:

Item	Material	Shorttext	Qty. requested	Un	C	Deliv. date	PGr	Matl group	Plnt	SLoc	SPit	D	T...
1	X	microscope		2	EA	D 02/10/2003	SMH	009	DUKE				
2	X	computer cart		1	EA	D 01/29/2003	SMH	004	DUKE				

13. Click on the button(s) to the left of the desired line item(s).

14. Click on the  **Account assignments** button (or press **SHIFT + F8**) to display the *Account Assignment for Item* screen.

The following screen is displayed:

Account Assignment for Item 00001

G/L account: 645000

Controlling area: DUKE

Cost center: 4516090

Order:


Profit center: 1199998


WBS element:

Unloading point: 456 Nana1ine Duke

Goods recipient: Who says

Change display Repeat acc. ass. on

15. Click on the **Continue** button  to display the *Item Overview* screen.

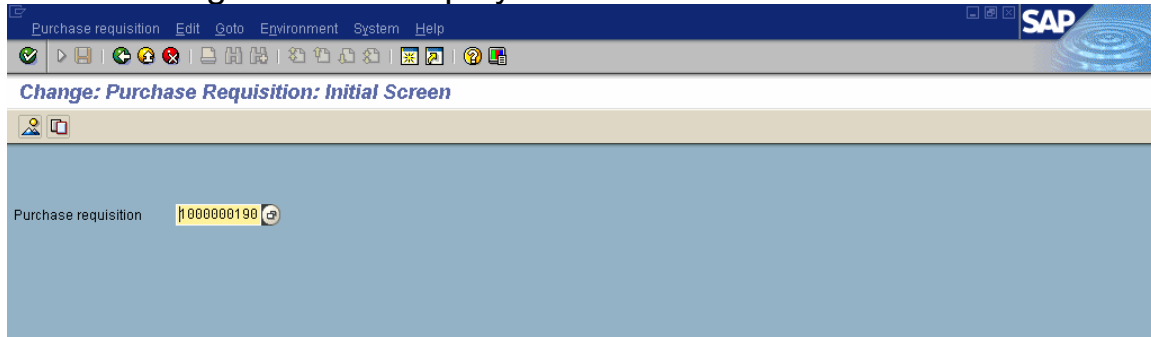
16. Click on the  **Exit** button until the initial R/3 screen is displayed.


Change a Purchase Requisition—ME52

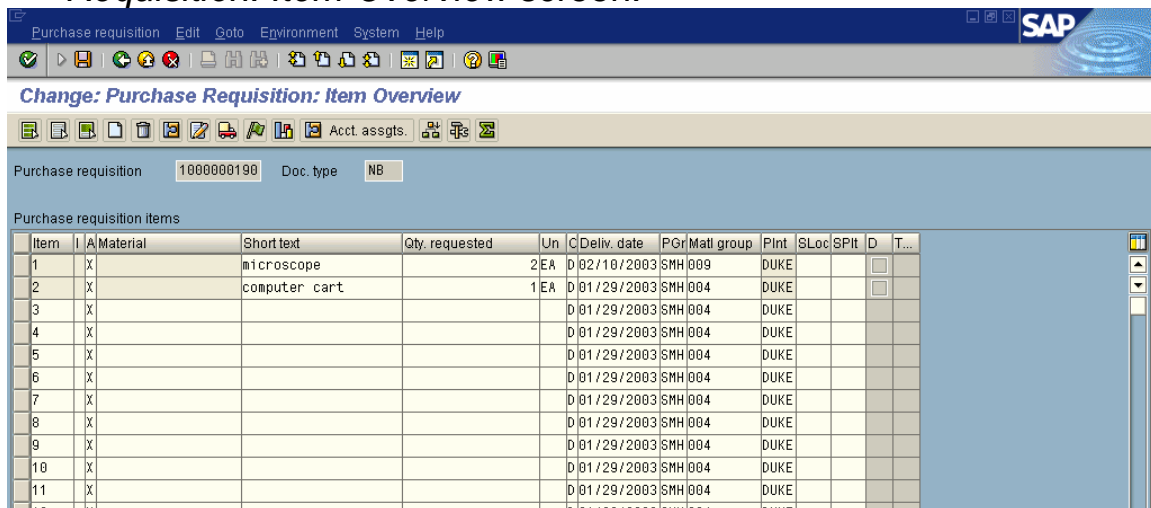
A purchase requisition for a material subject to a release strategy should not be changed after it has been approved. A requisition that has been processed into a Purchase Order cannot be changed.



Enter the transaction code **ME52** in the command field on the User Menu.

The following screen is displayed:





1. Enter the **purchase requisition** number.
2. Click on the  **Enter** button to display the *Change Purchase Requisition: Item Overview* screen:




3. Enter the new **quantity** (if applicable).
4. Click on the  **Enter** button or press **Enter**.
5. To change other elements, click on the button(s) to the immediate left of the desired line item(s).
6. Click on the  **Item details** button to display the *Item* screen:

Change a Purchase Requisition—ME52



- Enter the new **delivery date**, if applicable.
- Click on the  **Enter** button to display the *Item Overview* screen:
Note: Both Quantity requested and Delivery date reflect the changes. This will reset the approval process.

- Click on the blue buttons to the left of the desired line item(s).
- To change text, click on the  **Text overview** button (or Shift + F6) to display the *Purchase Requisition Texts: Item* screen:

Change a Purchase Requisition—ME52


11. Click in the **Item note** text box and enter item text or note text. You can also click on  **Long text**. ***THIS IS WHERE YOU WOULD ADD THE SPONSORED PROGRAMS CERTIFICATION IF YOU HAD NOT DONE IT BEFORE THE DEPARTMENT APPROVAL WAS GIVEN (see next step).***
12. When purchasing a piece of capital equipment (GL Account 66XXXX), on a Federal Sponsored Project (WBS Elements in 30X – 34X in Company Code 10) the following “certification” statement must be entered. Use the **Long Text** field to enter the statement:

“To the best of my knowledge, this item of equipment or substantially similar item is not available for shared use.”

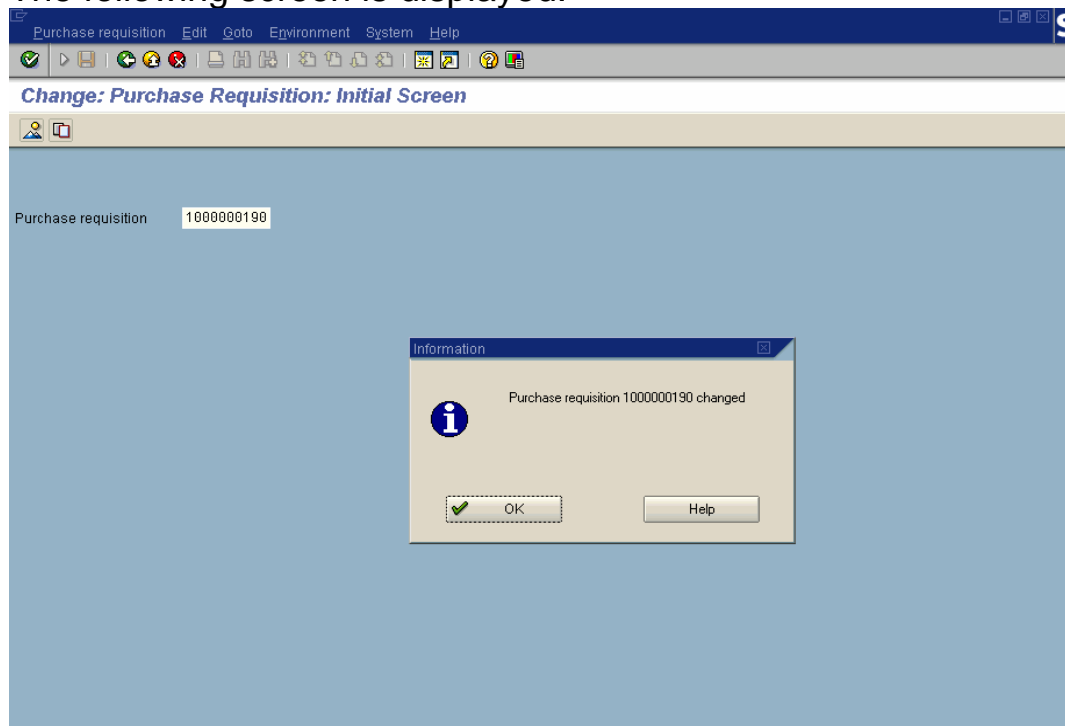
13. Click on the  **Enter** button or press **Enter**.
14. Click on the  **Back** button to display the *Item Overview* screen:

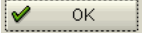

Item	I	A	Material	Short text	Qty. requested	Un	C	Deliv. date	PGr	Mat group	PInt	SLoc	SPit	D	T...
1	X			microscope		2	EA	D 02/10/2003	SMH	009	DUKE				
2	X			computer cart		1	EA	D 02/10/2003	SMH	004	DUKE				
3	X							D 01/29/2003	SMH	004	DUKE				
4	X							D 01/29/2003	SMH	004	DUKE				
5	X							D 01/29/2003	SMH	004	DUKE				

Change a Purchase Requisition—ME52


15. Click on the  **Save** button or press **Ctrl+S** to display the *Information* screen.

The following screen is displayed:



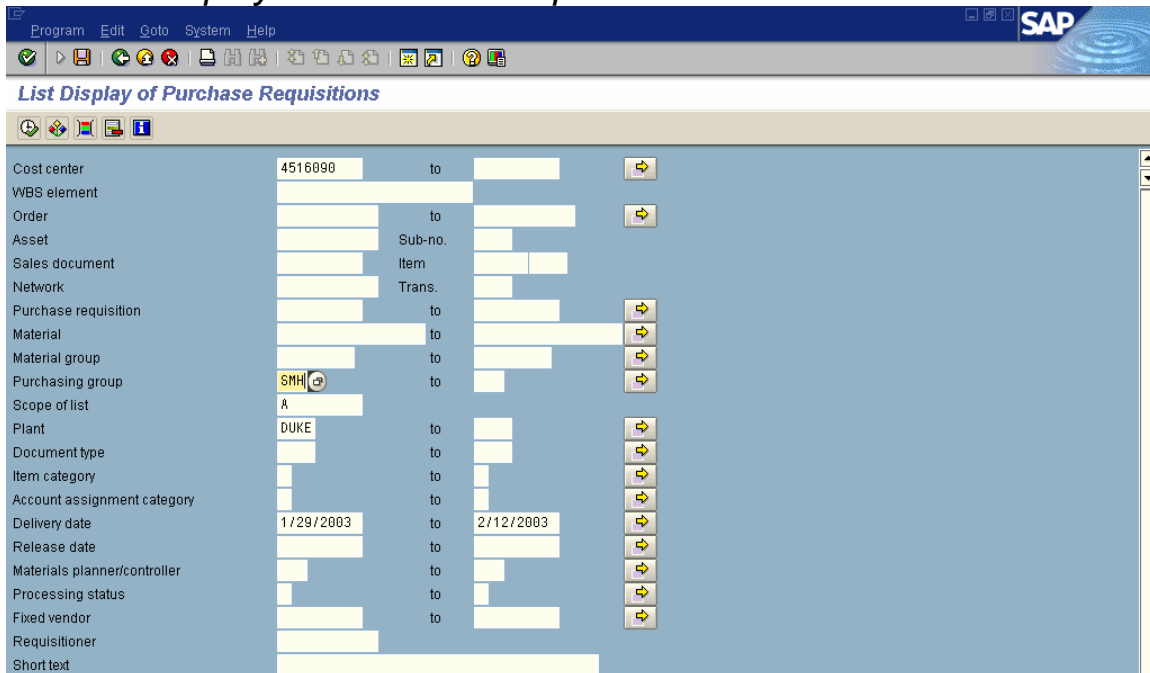
13. Click on the  **OK** button or press **Enter** to display the *Change: Purchase Requisition: Initial* screen.
14. Click on the  **Exit** button or press **Shift+F3** until the initial *SAP R/3 System* screen is displayed.

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

To see purchase requisitions in a cost center or WBS element, enter the transaction code **ME5K** in the command field on the User Menu and click on the  **Enter** button or press **Enter**.

(Or switch to the SAP Menu and use: **Logistics** → **Materials Management** → **Purchasing** → **Purchase Requisition** → **List Displays** → **By account assignment** → **ME5K General**).

The *List Display of Purchase Requisitions* screen is shown below:




Cost center	4516090	to		
WBS element				
Order		to		
Asset		Sub-no.		
Sales document		Item		
Network		Trans.		
Purchase requisition		to		
Material		to		
Material group		to		
Purchasing group	SMH	to		
Scope of list	A			
Plant	DUKE	to		
Document type		to		
Item category		to		
Account assignment category		to		
Delivery date	1/29/2003	to	2/12/2003	
Release date		to		
Materials planner/controller		to		
Processing status		to		
Fixed vendor		to		
Requisitioner				
Short text				

1. Enter the **cost center** or range of cost centers (or a WBS element) in the *Cost center* or *WBS element* field.
2. Enter your **purchasing group** in the *Purchasing group* field.
3. Enter a **date range** in the *Delivery date From* and *To* fields.

You may enter other data, as you wish, but the cost center or WBS element, purchasing group and dates are essential.


Note: If you want to view all requisitions, including those that have been turned into purchase orders, click the **Closed requisitions** checkbox at the bottom of the screen (you will get all requisitions charged during the time period you select).

4. Click on the  **Execute** button or press **F8** to display the *Purchase Requisitions per Account Assignment* screen.

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

The following screen is displayed:

Material	Short text	P6p	Mat. gp.
Requisn. Item	Requested qty. Un	Deliv. date	Requester
S C R OTy. I A	Ordered qty. Un	Release date	Trackg.no.
1000000190 00001	2 EA	D 02/10/2003	SMH
N R A NB X		01/29/2003	DUKE
Desired vendor	27706	SCIENTIFIC DEVICE LAB	
1000000190 00002	1 EA	D 02/10/2003	SMH
N R A NB X		01/29/2003	DUKE
Desired vendor	21227	HEWLETT PACKARD	

- Click once on the desired purchase requisition number.
- Click on the  **Detailed data** button or press **F8** to display the *Detailed Data on Requisition NNNNNNNNNN Item 00001* screen:

Detailed Data on Requisition 1000000190 Item 00002

Material: computer cart
 Matl group: 004 Doc. type: NB Plant: DUKE Stor. loc.: AcctAssCat: X

Qty. and date
 Quantity: 1 EA Deliv. date: D 02/10/2003 Status: Closed

Procurement options
 Agreement: 0 Purch. org.: Suppl. plant:
 Fixed vend: Info rec.:
 Des. vendor: 21227 FW order: 0

Purchase requisition data
 Req. date: 01/29/2003 Requisition: Purch. grp: SMH
 Order date: PurchOrder: 0 MRP ctrlr:
 Ordered: 0 TrackingNo: Release: A

Next requis. Release strat. Changes

Note: This screen shows purchase order information (Requisition date, Order date, PO Number); if the requisition has been turned into a purchase order, these fields will be filled in.

- Click on the  **Display requisition** button at the bottom or press **F2** to display the *Purchase Requisition: Item 00001* screen.

Note: This screen will show pricing information (Val. Price).

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

The following screen is displayed:

The screenshot displays the SAP R/3 interface for 'Display: Purchase Requisition: Item 00002'. The title bar includes 'Purchase requisition Edit Goto Environment System Help' and the SAP logo. The main content area is divided into several sections:

- Item Details:** Req. item: 1000000190 2, Item cat., AcctAssCat: X, Material, Matl group: 004, Plant: DUKE, Short text: computer cart, Stor. loc.
- Qty. and date:** Quantity: 1 EA, Deliv. date: 02/10/2003
- MRP data:** Requisnr., Purch. grp: SMH, Req. date: 01/29/2003, Resubmis.: 0, TrackingNo., MRP ctrlr, Release dt: 01/29/2003, GR pr.time: 0, Fixed, Closed.
- Valuation control:** Val. price: 100.00 USD / 1 EA, GR, IR, GR non-val.
- Procurement options:** Agreement: 0, Purchasing org., Fixed vend., Info rec., Des. vendor: 21227 HEWLETT PACKARD, Vendor mat. no., Suppl. plant.
- Reference:** Promotion, Batch.

The status bar at the bottom right shows 'TRN (1) (400) mashie OVR'.

8. Click on the  **General statistics** button or press **Shift+F5** to display the *Display: Purchase Requisition Statistics: for Item 00001* screen.

Note: The General or Statistics screen shows information such as who created the requisition (Created by), and purchase order information (Processing stat, Order quantity, Purchase order, Order date).

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

The following screen is displayed:

Display: Purchase Requisition Statistics: for Item 00002

Acct. assgts.

Requisn. item: 2
 Material: computer cart
 Item category: Standard
 Acct. assig. cat: X All non-asset prchs
 Plant: DUKE Duke University
 StorageLocation:

Administrative data


Creation ind.	R Created manually	Created by	JTUCKER
Processing stat	N Not processed	Changed on	01/29/2003
<input type="checkbox"/> "Fixed" ind.		No. resubmiss.	0
Release ind.	A Blocked - Awaiting Appr...	Last resubmiss.	
Rel. strategy	01	Total value	100.00 USD

Order statistics

Order quantity	0 EA	PurchOrderDate	
Purchase order	0		

MRP data

Shortage	0 EA	MRP ctrl	<input type="checkbox"/>	Reserv.no.	0
Pind dely time	0			SetReserNo	0

9. To see the release strategy, click on the  **Release strategy** button or press **Shift+F1**.

Note: If the item is subject to approval the Release Strategy Requis. NNNNNNNNNN, Item screen will appear and display release information. Otherwise, an Information message will state that the item is not subject to approval (example: med-surg supplies).

The following screen is displayed:

Release Strategy Requis. 1000243732, Item 00001


Release group: 01 Requisitions
 Release strategy: 01 A, <500

Release codes

Releases to date	
Final release	A1

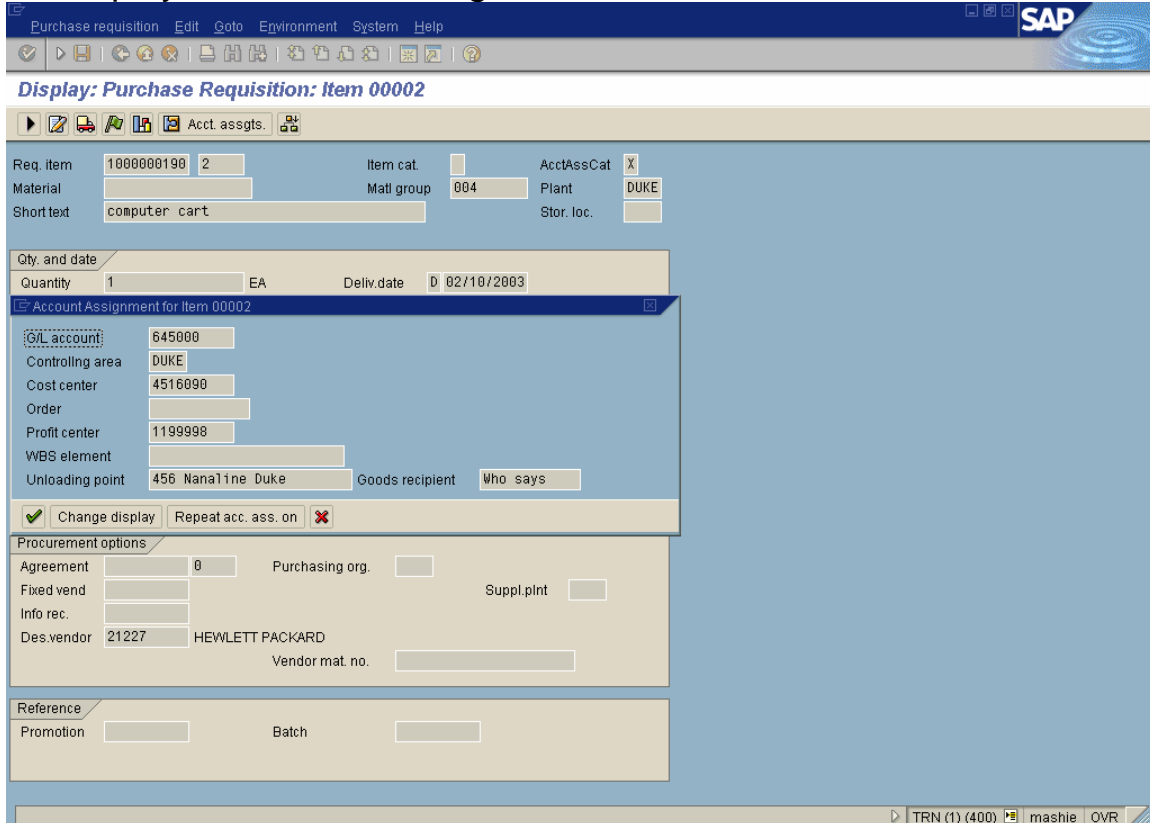
Release indicator: A Blocked - Awaiting Approval

Simulate release

10. Click on the  **Cancel** button or press **F12** to display the *Purchase Requisition: Item 00001* screen.

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

11. To check the cost center or WBS element used for charges, click on the  **Account assignments** button or press **Shift+F8** to display the *Account Assignment for Item 00001* screen:





The screenshot shows the SAP 'Account Assignment for Item 00002' screen. The main window title is 'Display: Purchase Requisition: Item 00002'. The 'Req. item' is 1000000190, 'Material' is computer cart, and 'Plant' is DUKE. A pop-up window titled 'Account Assignment for Item 00002' is open, showing the following fields:

GL account:	645000
Controlling area	DUKE
Cost center	4516090
Order	
Profit center	1199998
WBS element	
Unloading point	456 Nana1 ine Duke
Goods recipient	Who says

Below the pop-up window, there are sections for 'Procurement options' (Agreement, Fixed vend, Info rec, Des.vendor: 21227 HEWLETT PACKARD) and 'Reference' (Promotion, Batch).

Note: This screen shows information such as Unloading point (delivery point) and Goods recipient (who should receive the item/s).

12. Click on the  **Cancel** button on the Account Assignment screen or press **F12** to display the *Display: Purchase Requisition: Item 00001* screen again.

13. To check addresses, click on the  **Delivery address** button or press **F3** to display the Delivery Address for Item 00001 screen.

Note: This screen shows where the items are to be delivered (street address).

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

The *Delivery Address* screen is displayed:

Display: Purchase Requisition: Item 00002

Req. item Plant **DUKE** Address **202001911**

Material Stor. loc. Customer

Short text Vendor SC vendor

Qty. and date

Quantity

MRP data

Requisnr.

TrackingNo

Valuation cont

Val. price

Procurement Agreement

Fixed vend

Info rec.

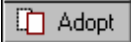
Des.vendor


Reference Promotion

Notes

Adopt Back

TRN (1) (400) mashie OVR

14. Click on the  **Adopt** button or press **F8** to display the *Display: Purchase Requisition: Item 00001* screen.

15. Click on the  **Back** button to display the *Detailed Data* screen:

Purchase Requisitions per Account Assignment

Assignments Services

Detailed Data on Requisition 1000000190 Item 00002

Material: computer cart Item cat.

Matl group 004 Doc. type NB Plant DUKE Stor. loc. AcctAssCat X

Qty. and date

Quantity 1 EA Deliv. date D 02/10/2003 Status

Procurement options

Agreement 0 Purch. org. Suppl. pint

Fixed vend Info rec.

Des. vendor 21227 FW order 0

Purchase requisition data

Req. date 01/29/2003 Requisnr. Purch. grp SMH

Order date PurchOrder 0 MRP ctr

Ordered 0 TrackingNo Release A


Next requis. Release strat. Changes

List Display of Purchase Requisitions by Account Assignment: Cost Center—ME5K

16. Click on the **Next requisn.** button at the bottom of the screen or press **Shift+F7** to display the *Purchase Requisition per Account Assignment* screen.

The following screen is displayed:

Material	Short text	P6p	Mat. gp.		
Requisn.	Item	Requested qty.	Un Deliv. date	Requester	P1nt SLoc
S C R	Oty. I A	Ordered qty.	Un Release date	Trackg.no.	SP1. MC
1000000190	00001	2	EA D 02/10/2003	SMH	009
N R A	NB X		01/29/2003		DUKE
Desired vendor	27706		SCIENTIFIC DEVICE LAB		
1000000190	00002	1	EA D 02/10/2003	SMH	004
N R A	NB X		01/29/2003		DUKE
Desired vendor	21227		HEWLETT PACKARD		

17. Repeat steps 5-16 above to see information about the other requisitions.
18. Click on the  **Exit** button or press **Shift+F3** until the initial R/3 screen is displayed.

Create a Purchase Requisition for Items Assigned to Multiple Cost Centers

Within the regular create a requisition process, an option exists to split a line item among two or more cost centers. This input can also be repeated for any additional line items in the same requisition.

Enter the transaction code **ME51** in the command field on the main SAP R/3 screen.

The following screen is displayed:

The screenshot shows the SAP 'Create: Purchase Requisition: Initial Screen' interface. The document type is set to 'NB'. The 'Source determination' checkbox is checked. The 'Default data for items' section includes the following fields:


Item category	
Acc. assignment cat.	X
Delivery date	T 02/14/2003
Plant	DUKE
Storage location	
Purchasing group	SMH
Material group	
Req. tracking number	
Requisitioner	
Supplying plant	

1. Enter the appropriate **document type** from the valid options:

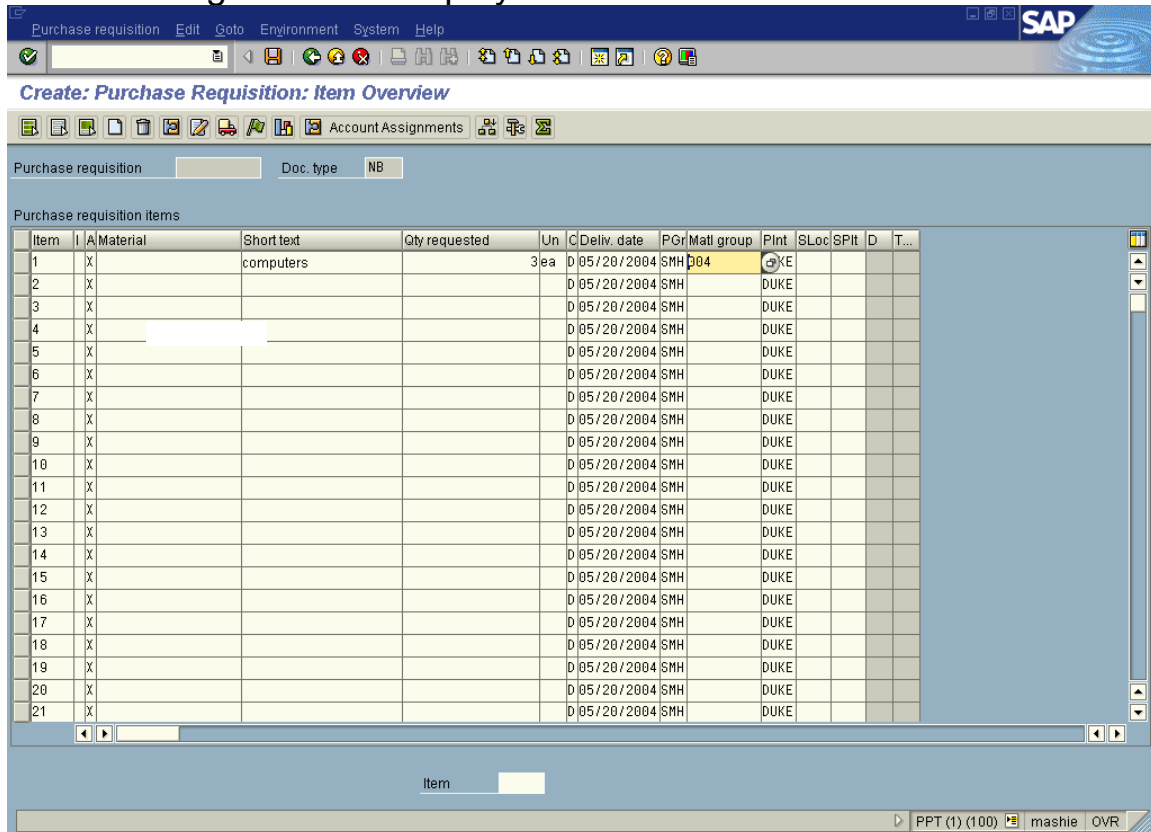
NB	<u>for a Purchase requisition (used for regular purchase requisitions and is the default)</u>
SH	for SPECIAL HANDLING (needs Procurement Services handling i.e.: attachments)

2. Be sure that the **Source determination** check box defaults with a checkmark. This allows the system to select a vendor if possible.

Create a Purchase Requisition for Items Assigned to Multiple Cost Centers

3. Enter the appropriate **account assignment category** from the valid entries:
X for All non-asset prchs (materials for consumption and is the default)
R for Items Goods Receipt (used when receiving activity is expected and performed consistently – may be set as the default for those areas)
4. Enter the delivery date.
5. Select the appropriate facility (**plant**).
6. Enter the purchasing group.
7. Click on the  **Enter** button or press **Enter** to display the *Create: Purchase Requisition: Item Overview* screen.


The following screen is displayed:



Item	I	A	Material	Short text	Qty requested	Un	C	Deliv. date	PGr/Matl group	Pint	SLoc	SPit	D	T...
1	X			computers		3ea	D	05/20/2004	SMH 004	DUKE				
2	X						D	05/20/2004	SMH	DUKE				
3	X						D	05/20/2004	SMH	DUKE				
4	X						D	05/20/2004	SMH	DUKE				
5	X						D	05/20/2004	SMH	DUKE				
6	X						D	05/20/2004	SMH	DUKE				
7	X						D	05/20/2004	SMH	DUKE				
8	X						D	05/20/2004	SMH	DUKE				
9	X						D	05/20/2004	SMH	DUKE				
10	X						D	05/20/2004	SMH	DUKE				
11	X						D	05/20/2004	SMH	DUKE				
12	X						D	05/20/2004	SMH	DUKE				
13	X						D	05/20/2004	SMH	DUKE				
14	X						D	05/20/2004	SMH	DUKE				
15	X						D	05/20/2004	SMH	DUKE				
16	X						D	05/20/2004	SMH	DUKE				
17	X						D	05/20/2004	SMH	DUKE				
18	X						D	05/20/2004	SMH	DUKE				
19	X						D	05/20/2004	SMH	DUKE				
20	X						D	05/20/2004	SMH	DUKE				
21	X						D	05/20/2004	SMH	DUKE				

8. If you are ordering from the Material Master, click in the **Material** field and search by clicking the dropdown.
 Note: *The first time you click on this match code search, a Search Help Selection box will offer several ways of sorting for material numbers, select "W".*
9. Search for the material, using a single noun and asterisks (e.g., *computers*)


Create a Purchase Requisition for Items Assigned to Multiple Cost Centers

10. Enter the requested **quantity**.
 11. Click on the  **Enter** button or press **Enter** to display the *Create Purchase Requisition: Item* screen.
- If you are ordering from outside, the following screen is displayed:

The screenshot displays the SAP 'Create: Purchase Requisition: Item 00001' screen. The interface includes a menu bar (Purchase requisition, Edit, Goto, Environment, System, Help) and a toolbar. The main area is divided into several sections:

- Req. item:** 1, Item cat., Mat. group: 004, Plant: DUKE, Stor. loc.
- Material:** computers
- Qty. and date:** Quantity: 4 EA, Deliv. date: 02/14/2003
- MRP data:** Requisition, Purch. grp, SMH, Req. date: 01/30/2003, Resubmis., TrackingNo, MRP ctrlr, Release dt: 01/30/2003, GR pr.time, Fixed checkbox.
- Valuation control:** Val. price: 1,200.00 USD / 1 EA, GR checkbox, IR checked checkbox, GR non-val checkbox.
- Procurement options:** Agreement, Purchasing org., Fixed vend, Suppl.plnt, Info rec., Des.vendor: 24337 IBM/TRANSARC, Vendor mat. no.
- Reference:** Promotion, Batch.

The status bar at the bottom shows 'TRN (1) (400) mashie OVR'.

11. Enter the approximate cost in the Val. Price field.
12. Enter a vendor number, if desired, in the Des. Vendor field. If you do not know the number, do a match code search by clicking on the dropdown.
13. Select the **0 Purchasing Vendors – Ordering Addresses** tab and typing the vendor name in the Name field with asterisks. Click on **Enter** and select the vendor by double-clicking on the correct name and ordering address.
14. Click on the  **Enter** button to display the *Account Assignment for Item* screen:

The screenshot displays the SAP 'Account Assignment for Item 00001' screen. The fields are as follows:

- G/L account: 687400
- Controlling area: DUKE
- Cost center: 1512039
- Order: [empty]
- Profit center: [empty]
- WBS element: [empty]
- Unloading point: 230 Social Sciences
- Goods recipient: Bea There

The status bar at the bottom shows 'Change display Repeat acc. ass. on' with a red 'X' icon.

Create a Purchase Requisition for Items Assigned to Multiple Cost Centers

15. Enter the **GL Account** and the **Cost center** (or **WBS Element**).
16. Enter the **Unloading point**.
17. Enter the **Goods recipient**.
18. **IMPORTANT**: Click on the **Change display** button to display the *Account Assignment for Item* screen:

Purchase requisition Edit Goto Environment System Help

Create: Purchase Requisition: Account Assignment for Item 00001


Req. item 1 AcctAssCat X Quantity 4 EA
 GR IR Distribution 1
 GR non-val Partial invoice

N	Quantity/percent	Cost ctr	G/L acct	Order	WBS element	Profit center	Unloading point	Recipient	D	A
14.000		1512039	687400			1199998	230 Social Sci...	Bea There	<input type="checkbox"/>	<input type="checkbox"/>
2									<input type="checkbox"/>	<input type="checkbox"/>
3									<input type="checkbox"/>	<input type="checkbox"/>
4									<input type="checkbox"/>	<input type="checkbox"/>
5									<input type="checkbox"/>	<input type="checkbox"/>
6									<input type="checkbox"/>	<input type="checkbox"/>
7									<input type="checkbox"/>	<input type="checkbox"/>

19. If goods receipt is required, place a check in the **GR** box. If goods receipt is NOT required, be sure BOTH **GR** and **GR non-val** boxes are unchecked.
20. Select the appropriate distribution method to charge to different cost objects in the **Distribution** box, either **quantity** or **percent**.
21. Enter the same choice (1 or 2) in the **Partial invoice** box as selected in the **Distribution** box.
22. Enter the appropriate quantities/percentages in the **Quantity/percent** fields – for example, 1,2, etc. or 50, 50. The system will accept only whole numbers, not decimals.
23. Enter the appropriate cost centers in the **Cost ctr** fields (or **WBS Elements**, if applicable).
24. Enter the **unloading points** (you can have delivery to different rooms in same building)
25. Enter the **Recipients** (goods recipients can be different).

Create a Purchase Requisition for Items Assigned to Multiple Cost Centers

N.	Quantity/percent	Cost Ctr	G/L Acct	Order	WBS Element	Profit Center	Unloading Point	Recipient	D	A
1	50	1573070	687400			1199998	011 Broad	JTucker		
2	50	1573123	687400				230 Broad	MKenney		
3										
4										
5										
6										
7										

26. Follow the menu path given below to repeat the information on this screen for additional items to be ordered if the information is going to be the same: **Edit** → **Repeat acct assgt** → **Switch on**. There will be a message: Repeat account assignment held.
27. Click on the  **Back** button or press **F3** to display the *Delivery Address for Item* screen:

Plant: DUKE Address: 202001973

Req. item: Stor. loc. Customer: Vendor: SC vendor

Title: Duke University Search terms: A SOCIAL SCIENCES
Name: Social Sciences B

House address
Street/House number: West Campus
Postal code/City: 27708 Durham
District: Details...
Country: US USA Time zone: EST
Region: NC NORTH CAROLINA Jurisdic. code: NC0000000

PO box address
PO Box: Postal code: Other city...
Company postal code:

Communication
Language: EN English Other communication...
Telephone: Fax: Standard comm.type:

Notes:

Buttons: Adopt, Reset, Repeat address on, Repeat address off

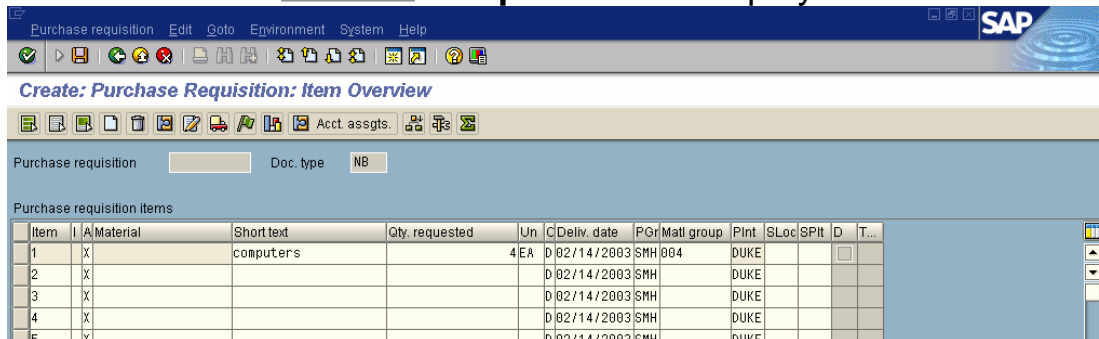
28. Enter the **Address** number or select it via matchcode search.

Create a Purchase Requisition for Items Assigned to Multiple Cost Centers


25. Click on the **Repeat address on** button to display the *Information* screen. You will get a message: "Delivery address held."

26. Click on the  **Continue** button to display the full address.

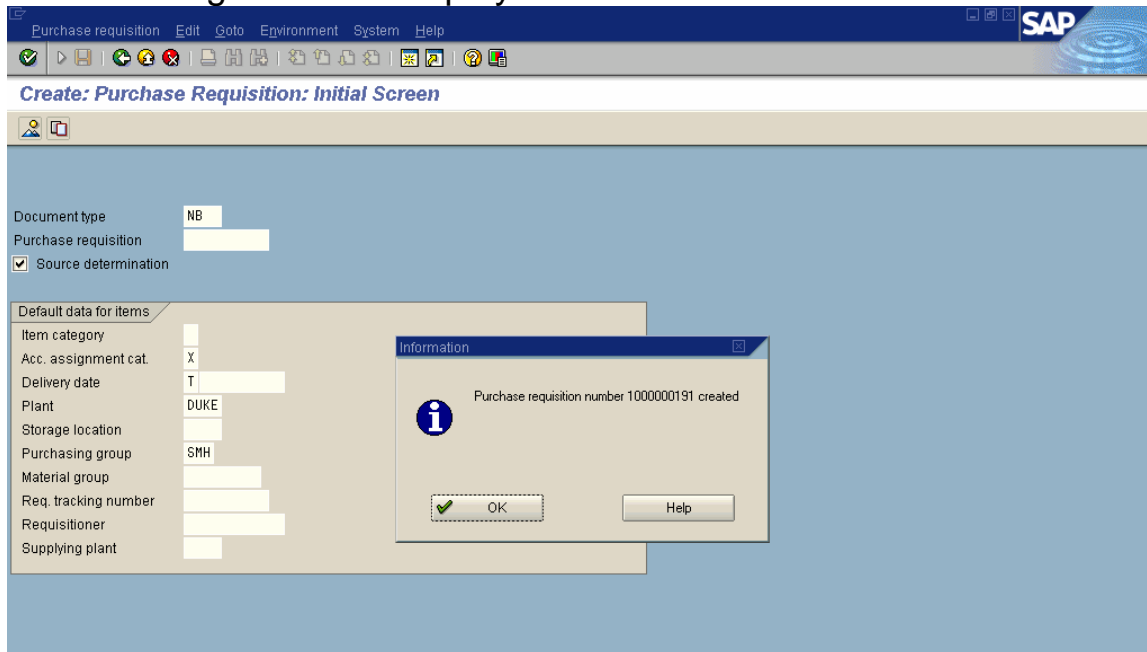
27. Click on the  **Adopt** button to display the *Item Overview*:



Item	Material	Short text	Qty. requested	Un	C	Deliv. date	PGr	Matl group	Plnt	SLoc	SPit	D	T...
1	X	computers	4	EA	D	02/14/2003	SMH	004	DUKE				
2	X				D	02/14/2003	SMH		DUKE				
3	X				D	02/14/2003	SMH		DUKE				
4	X				D	02/14/2003	SMH		DUKE				
5	X				D	02/14/2003	SMH		DUKE				

28. Click on the  **Save** button or press **Ctrl+S** to display the *Information* screen.

The following screen is displayed:





Document type: NB
 Purchase requisition:
 Source determination

Default data for items

Item category	
Acc. assignment cat.	X
Delivery date	T
Plant	DUKE
Storage location	
Purchasing group	SMH
Material group	
Req. tracking number	
Requisitioner	
Supplying plant	

Information
 Purchase requisition number 1000000191 created

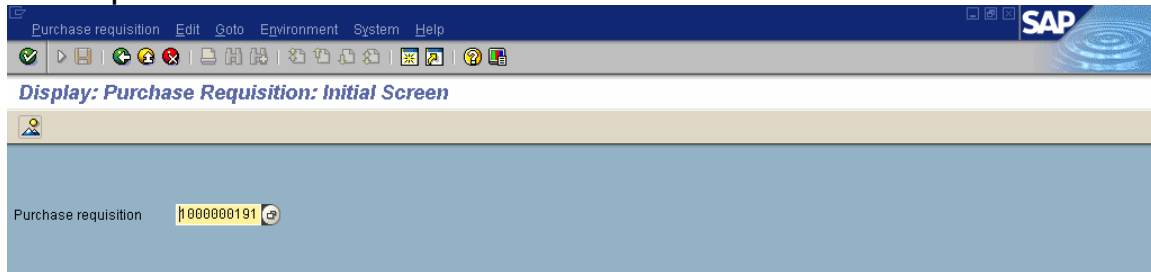
29. Click on the  **OK** button or press **Enter** to see the *Create: Purchase Requisition: Initial Screen*.


30. Click on the  **Exit** button or press **Shift+F3** until the initial SAP R/3 System screen is displayed.

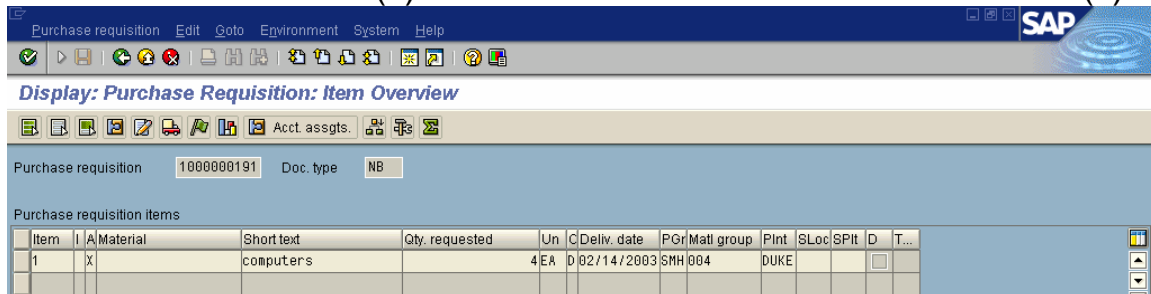
Display a Purchase Order Using a Purchase Requisition Number—ME53

Enter **ME53** in the command field on the main SAP R/3 screen.

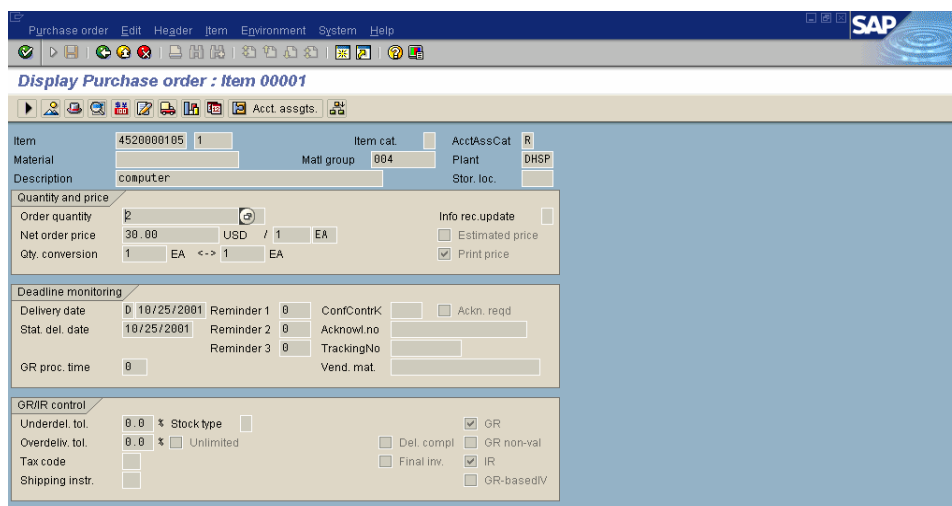
1. Enter the **purchase requisition** number in the Purchase requisition field:



2. Click on the  **Enter** button or press **Enter** to display the *Item Overview* screen.
3. Click on the button(s) to the immediate left of the desired item(s):



4. Follow the menu path below to display the Purchase Order:
Environment→**Purchase Order**→**Last Purchase Order**

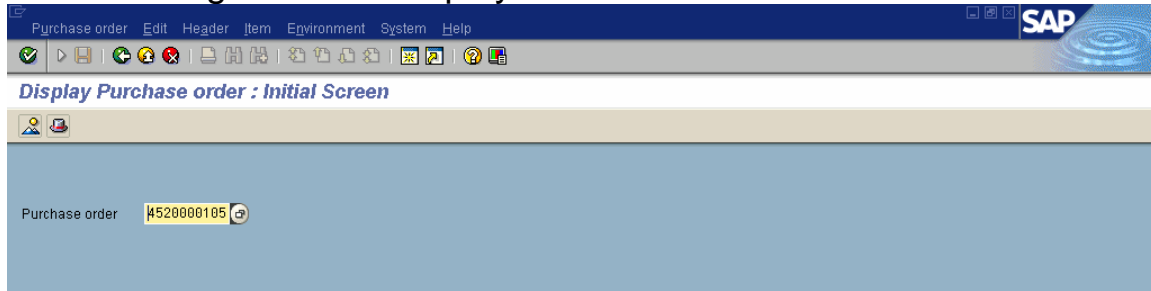



5. Proceed to Step 4 in the exercise on the next page (page 51):

Display a Purchase Order Using a Purchase Order Number—ME23

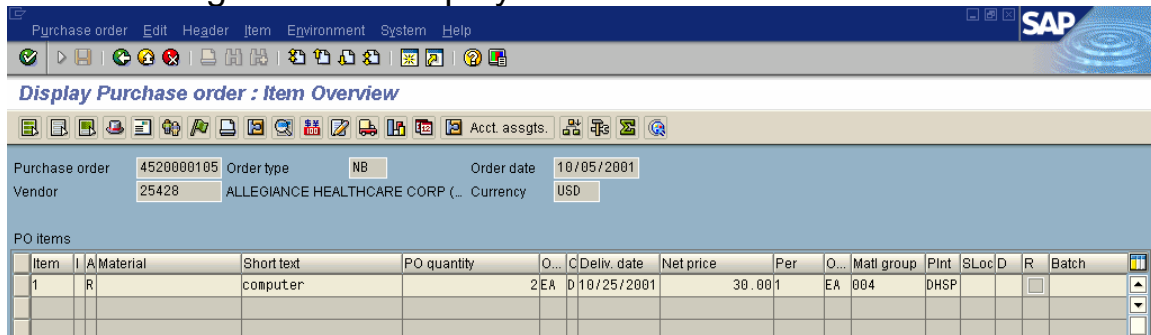
To view a purchase order using a **purchase order number**, enter the transaction code **ME23** on the main SAP R/3 screen.

The following screen is displayed:




1. Enter the **purchase order** number.
2. Click on the  **Enter** button to display the *Display Purchase order: Item Overview* screen.

The following screen is displayed:



3. Click on the button(s) to the immediate left of the desired item(s).

[The **Display a Purchase Order Using a Purchase Requisition Number** resumes here.]

4. Click on the button next to the item and click on the  **Header details** button or go to **Header** → **Details** to display the *Header Data* screen.

Display a Purchase Order Using a Purchase Order Number—ME23

The following screen is displayed:


Display Purchase order : Header Data

Purchase order: 4520000105 Company code: 0030 Purchasing group: SMH
 Document type: NB Purch. organization: DUKE
 Vendor: 25428 ALLEGIANCE HEALTHCARE CORP (NONR...)

Administr. fields
 PurchOrderDate: 10/05/2001 Item interval: 1
 Language key: EN Sub-item inter.: 1 Complete deliv.:
 Validity start: Validity end:

Terms of delivery and payment
 Payment terms: N15 Currency: USD
 Payment in: 15 Days 0.000 \$ Exch. rate: 1.00000 Ex.rate fix:
 Payment in: 0 Days 0.000 \$ Incoterms: FOB Origin Freight Allowed
 Payment in: 0 Days net

Reference data
 Quotation date: Quotation:
 Your reference: Salesperson:
 Our reference: Telephone:
 Suppl. vendor: Invoicing party: 25427

5. To see any text in the order, click on the  **Text overview** button to display the *Header Texts* screen.

The following screen is displayed:

Display Purchase Order : Header Texts

Long text

Purchasing Doc.: 4520001075 Company Code: 0010 Purchasing group: MB6
 Document Type: NB Purch. Organization: DUKE
 Vendor: 71 ROCHE DIAGNOSTICS CORPORATION


TxtType	Text	More text	Status
<input type="checkbox"/>	Header text	<input type="checkbox"/>	
<input type="checkbox"/>	Header note APPROVAL PER KURT AVERY	<input type="checkbox"/>	
<input type="checkbox"/>	Shipping instructions	<input type="checkbox"/>	

6. Click on the  **Back** button to display the *Item Overview* screen:

Display a Purchase Order Using a Purchase Order Number—ME23

Purchase order: 4520000105 Order type: NB Order date: 10/05/2001
Vendor: 25428 ALLEGIANCE HEALTHCARE CORP (L) Currency: USD

Item	I	A	Material	Short text	PO quantity	O...	C	Deliv. date	Net price	Per	O...	Matl group	PInt	S	Loc	D	R	Batch
1		R		computer	2	EA	D	10/25/2001	30.001	1	EA	004	DHSP					

- Click on the button(s) to the immediate left of the desired line item(s).
- Click on the  **Vendor address** button to display the *Vendor Address* screen:

Purchase order: 4520000105 Company code: 0030 Purch. group: SMH
PurchOrderDate: 10/05/2001 Order type: NB Purchasing org.: DUKE
Vendor: 25428

Title: _____ Search terms: A ALLEGIANCE, B _____
Name: ALLEGIANCE HEALTHCARE CORP (NONRSK)
VALUELINK FACILITY

House address:
Street/House number: 2800 PERIMETER PARK DRIVE STE A
Postal code/City: 27560 MORRISVILLE
District: _____
Country: US USA Time zone: EST
Region: NC NORTH CAROLINA Jurisdic. code: NC0000000

PO box address:
PO Box: _____
Postal code: _____ Other city...: _____
Company postal code: _____

Communication:
Language: EN English Other communication...: _____
Telephone: 800-469-9664
Fax: 410-290-9513

Notes: _____

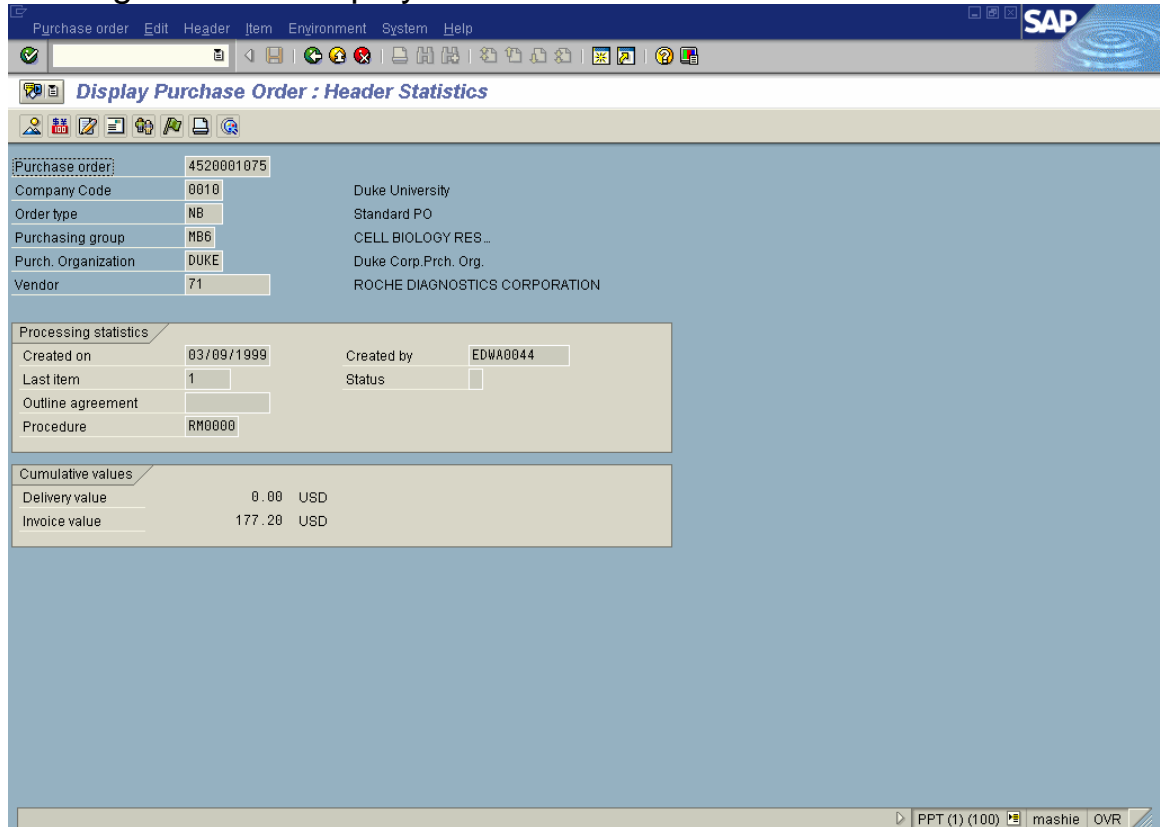
TRN (1) (400) mashie INS

- Follow the menu path given below to display the *Header Statistics* screen:

Header → Statistics → General

Display a Purchase Order Using a Purchase Order Number—ME23

The following screen is displayed:



Display Purchase Order : Header Statistics

Purchase order: 4520001075

Company Code 0010 Duke University

Order type NB Standard PO

Purchasing group MB6 CELL BIOLOGY RES...

Purch. Organization DUKE Duke Corp.Prch. Org.

Vendor 71 ROCHE DIAGNOSTICS CORPORATION

Processing statistics

Created on 03/09/1999 Created by EDWA0044

Last item 1 Status

Outline agreement

Procedure RM0000

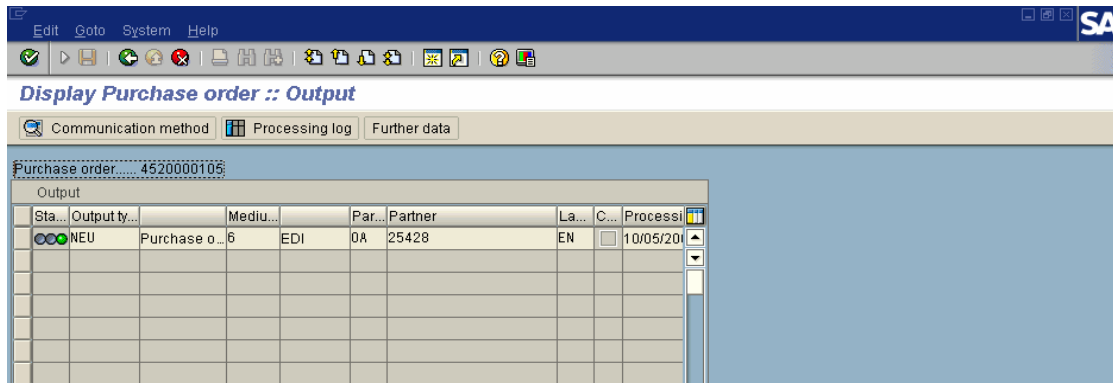
Cumulative values

Delivery value 0.00 USD

Invoice value 177.20 USD

Note: The ID of the person who created the purchase order is in the Created by field.

10. Follow the menu path: **Header** → **Messages** to display the *Output* screen:



Display Purchase order :: Output


Communication method Processing log Further data

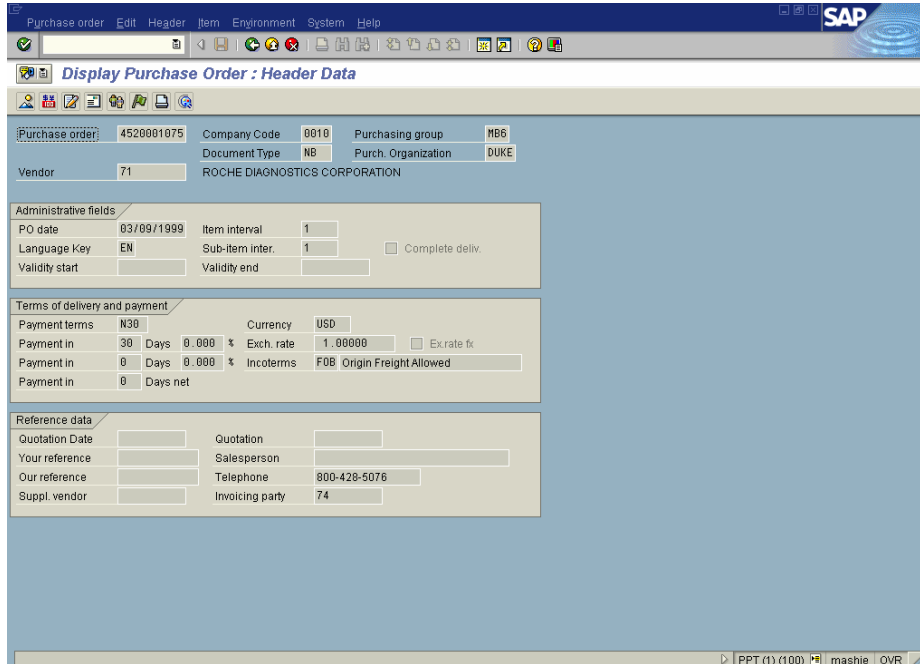
Purchase order: 4520000106

Sta...	Output ty...	Mediu...	Par...	Partner	La...	C...	Processi
●	NEU	Purchase o...	6	EDI	0A	25428	EN 10/05/20

11. A green light means the purchase order has been sent to the vendor. A yellow light means a delay for some reason and a red light means there is a problem with the purchase order.

Display a Purchase Order Using a Purchase Order Number—ME23

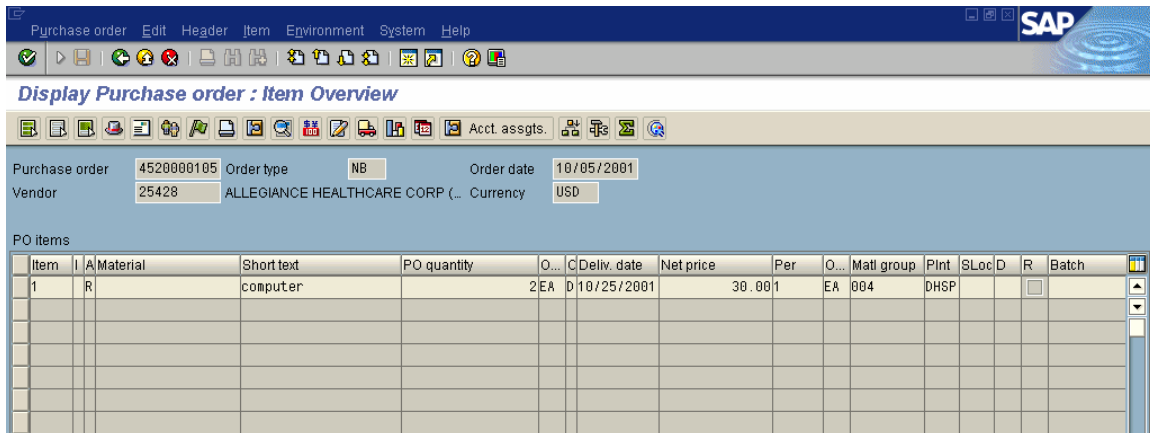
12. Click on the  **Back** button to display the *Header Data* screen:



The screenshot shows the SAP 'Display Purchase Order: Header Data' screen. The interface includes a menu bar (Purchase order, Edit, Header, Item, Environment, System, Help) and a toolbar. The main data area is divided into several sections:

- Header Data:** Purchase order: 4520001075, Company Code: 0010, Purchasing group: MB6, Document Type: NB, Purch. Organization: DUKE, Vendor: 71, ROCHE DIAGNOSTICS CORPORATION.
- Administrative fields:** PO date: 03/09/1999, Item interval: 1, Language Key: EN, Sub-Item Inter.: 1, Validity start/end fields, and a 'Complete deliv.' checkbox.
- Terms of delivery and payment:** Payment terms: N30, Currency: USD, Payment in: 30 Days, Exch. rate: 1.00000, Incoterms: FOB Origin Freight Allowed.
- Reference data:** Quotation Date, Quotation, Your reference, Salesperson, Our reference, Telephone: 800-428-5076, Suppl. vendor, Invoicing party: 74.

13. Click on the  **Overview** button to display the *Item Overview* screen:



The screenshot shows the SAP 'Display Purchase Order: Item Overview' screen. It displays a table of PO items with the following data:

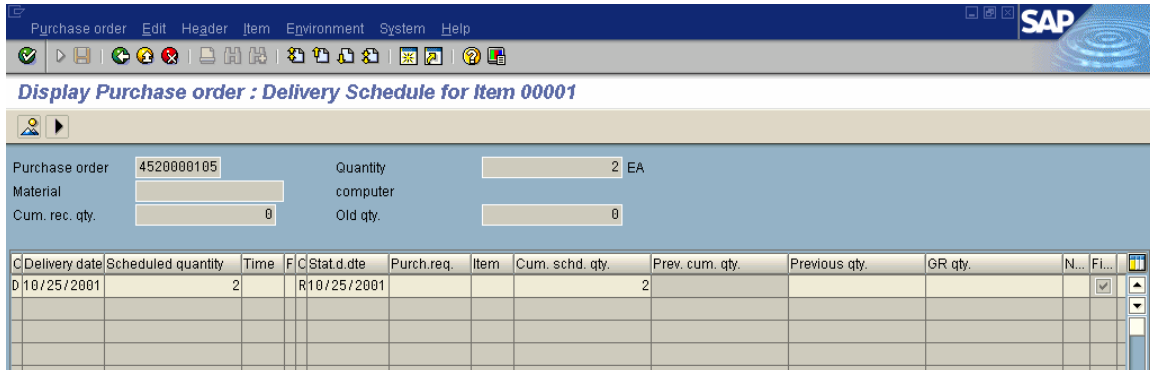
Item	I	A	Material	Short text	PO quantity	O...	C	Deliv. date	Net price	Per	O...	Matl group	PInt	S	Loc	D	R	Batch
1		R		computer		2	EA	D 10/25/2001	30.00	1	EA	004	DHSP					


14. Click on the button(s) to the immediate left of the desired line item(s).
15. Follow the menu path given below to display the *Item* screen:

Item → Delivery schedule

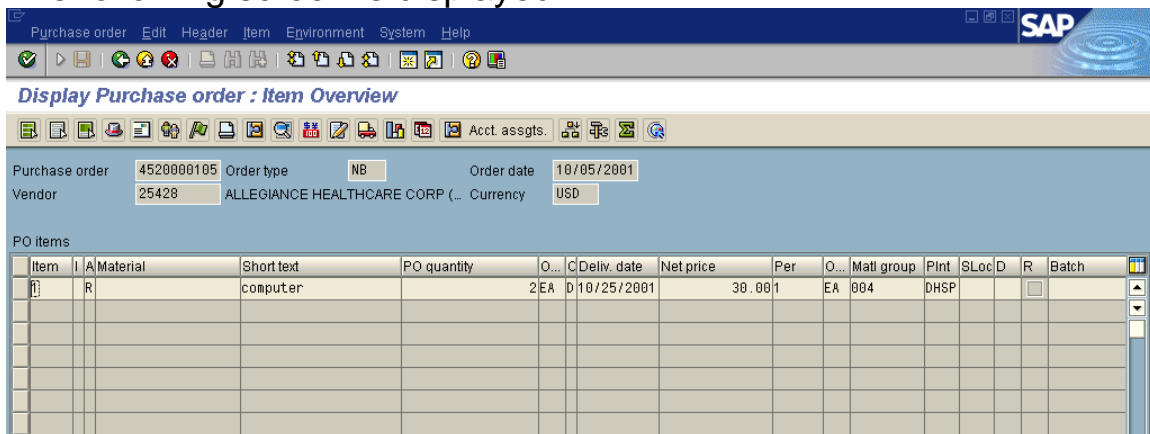
The following screen is displayed:

Display a Purchase Order Using a Purchase Order Number—ME23



16. Click on the  **Back** button to display the *Item Overview* screen.

The following screen is displayed:

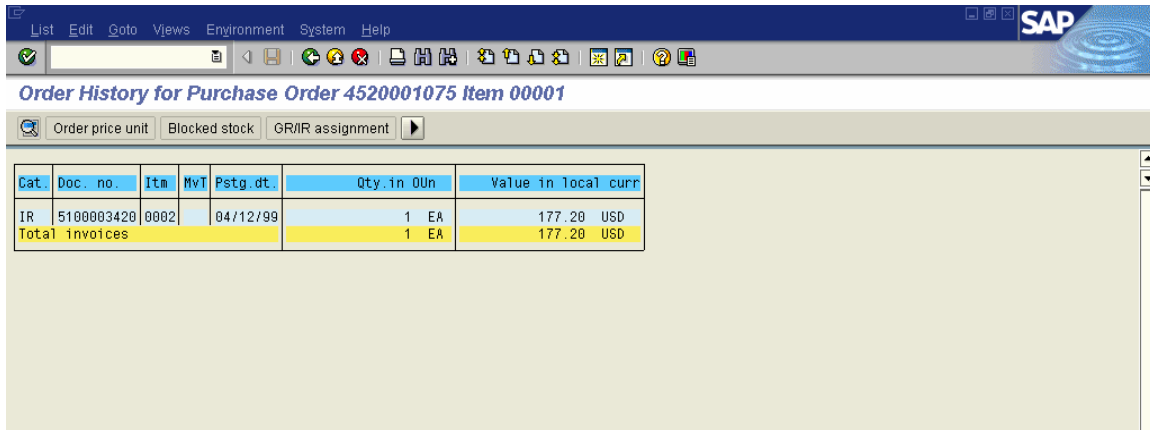


17. Click on the button(s) to the immediate left of the desired line item(s).

18. Click on the  **PO History** button to display the *Order History for Purchase Order NNNNNNNNNN Item* screen.

Display a Purchase Order Using a Purchase Order Number—ME23


The following screen is displayed:



The screenshot shows the SAP ME23 'Order History' screen for Purchase Order 4520001075, Item 00001. The interface includes a menu bar (List, Edit, Goto, Views, Environment, System, Help), a toolbar with various icons, and a title bar with the SAP logo. Below the title bar, there are tabs for 'Order price unit', 'Blocked stock', and 'GR/IR assignment'. The main content area displays a table with the following data:

Cat.	Doc. no.	Itm	MVT	Pstg. dt.	Qty. in UoM	Value in local curr.
IR	5100003420	00002		04/12/99	1 EA	177.20 USD
Total invoices					1 EA	177.20 USD

Note: if goods receipt is done, there will be information on the goods receipt in the Order History.

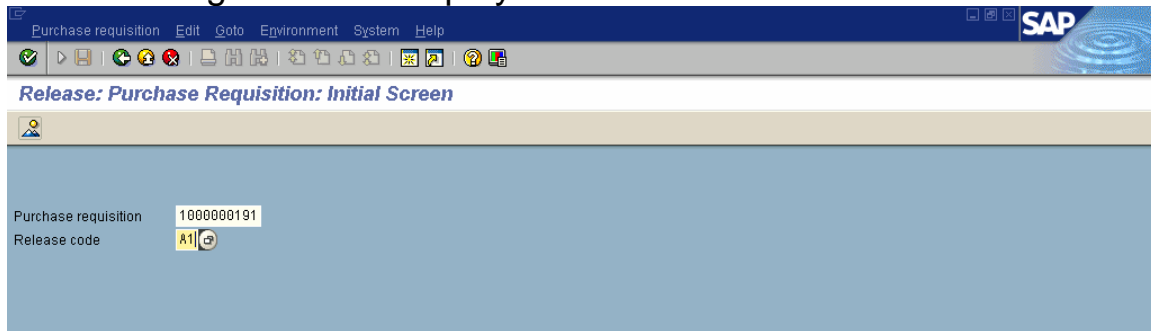
19. Click on the  **Exit** button or press **Shift+F3** until the initial *SAP R/3 System* screen is displayed.


Individual Release of a Purchase Requisition—ME54

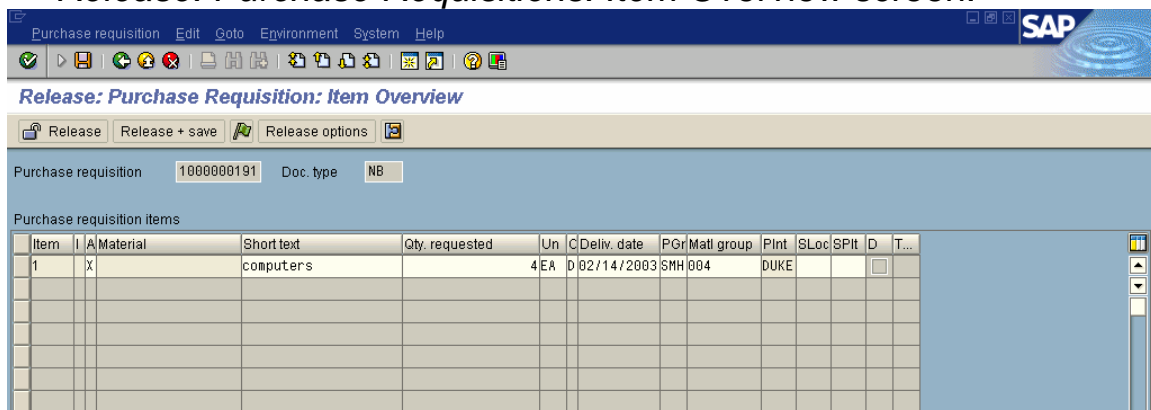
Some purchase requisitions may require approval before they can be converted into a purchase order. The approving party may change a requisition that is subject to approval before it is released.


Enter the transaction code **ME54** in the command field on the main SAP R/3 screen.

The following screen is displayed:



1. Enter the **purchase requisition** number.
2. Enter the **release code**. In this example, the release code is **A1**.
3. Click on the  **Enter** button or press **Enter** to display the *Release: Purchase Requisitions: Item Overview* screen:



4. Click on the button(s) to the left of the line item(s) for approval.
5. To select all items, click on **Edit** → **Selections** → **Select All**.
6. When ready to release, click on the **Release + save** button (not the Release with the lock) or press **F8** to display the *Initial Screen*.
7. Click on the  **Exit** button or press **Shift+F3** until the initial SAP R/3 System screen is displayed.

Collective Release of a Purchase Requisition—ME55


A collective release of purchase requisitions allows several purchase requisitions to be approved simultaneously and is executed when several requisitions sharing similar criteria must be released. A collective release of purchase requisitions functions similarly to list display transactions. Selection criteria, such as the release code, purchasing group and plant, are entered in the initial screen. All purchase requisitions meeting the selection criteria are displayed.

Enter the transaction code **ME55** in the command field on the main SAP R/3 screen.

The following screen is displayed:

1. Enter the **release code**.
2. Enter the **purchasing group**.

Note: You can enter additional information in other fields such as Document type, Delivery date, etc which will narrow down your search.

3. Click on the  **Execute** button to display the *Collective Release of Purchase Requisitions* screen.

Collective Release of a Purchase Requisition—ME55

The following screen is displayed:

Material	Short text	P6p	Mat. gp.
Requisn. Item	Requested qty. Un	Deliv. date	Requester
S C R Qty. I A	Req. val. Cur	Release date	Trackg.no. SPl. MC
Release strategy	Release indicator	Release option	
<input type="checkbox"/>	microscope	SMH	009
1000000180 00001	1 EA D 01/30/2003		DUKE
N R A NB X	789.00 USD 01/16/2003		
01/02	A,>500 A Blocked - Awaiting A Release possible		
Desired vendor	27706 SCIENTIFIC DEVICE LAB		
<input type="checkbox"/>	microscope	SMH	009
1000000181 00001	2 EA D 01/30/2003		DUKE
N R A NB X	10,450.00 USD 01/16/2003		
01/03	A,>5K A Blocked - Awaiting A Release possible		
Desired vendor	27706 SCIENTIFIC DEVICE LAB		
<input type="checkbox"/>	CUP, STYROFOAM 16 OUNCE	SMH	420
11538			
1000000182 00001	10 SL D 01/30/2003		DUKE
N R A NB X	7.70 USD 01/29/2003		MM
01/01	A,<500 A Blocked - Awaiting A Release possible		
Info rec	5300002259 Vendor 0000025428 Purch. org. DUKE		
<input type="checkbox"/>	CUP, STYROFOAM COFFEE 6 OUNCE	SMH	420
11537			
1000000183 00001	3 SL D 01/16/2003		DUKE
N R A NB X	2.01 USD 01/16/2003		MM
01/01	A,<500 A Blocked - Awaiting A Release possible		
Info rec	5300002258 Vendor 0000025428 Purch. org. DUKE		
<input type="checkbox"/>	microscope	SMH	009

- Click on the check box to the left of the desired purchase requisition item(s) and press **F9** to select.
- Click on the **Save** button or press **Ctrl + S** to save the release.

The following green lines (with information on additional release codes) are displayed:

Material	Short text	P6p	Mat. gp.
Requisn. Item	Requested qty. Un	Deliv. date	Requester
S C R Qty. I A	Req. val. Cur	Release date	Trackg.no. SPl. MC
Release strategy	Release indicator	Release option	
<input type="checkbox"/>	microscope	SMH	009
1000000180 00001	1 EA D 01/30/2003		DUKE
N R A NB X	789.00 USD 01/16/2003		
01/02	A,>500 A Blocked - Awaiting A Release effected		
Desired vendor	27706 SCIENTIFIC DEVICE LAB		
<input type="checkbox"/>	microscope	SMH	009
1000000181 00001	2 EA D 01/30/2003		DUKE
N R A NB X	10,450.00 USD 01/16/2003		
01/03	A,>5K A Blocked - Awaiting A Release effected		
Desired vendor	27706 SCIENTIFIC DEVICE LAB		
<input type="checkbox"/>	CUP, STYROFOAM 16 OUNCE	SMH	420
11538			
1000000182 00001	10 SL D 01/30/2003		DUKE
N R A NB X	7.70 USD 01/29/2003		MM
01/01	A,<500 Z Fully Released for P Release effected		
Info rec	5300002259 Vendor 0000025428 Purch. org. DUKE		
<input type="checkbox"/>	CUP, STYROFOAM COFFEE 6 OUNCE	SMH	420
11537			
1000000183 00001	3 SL D 01/16/2003		DUKE
N R A NB X	2.01 USD 01/16/2003		MM

- Click on the **Exit** button or press **Shift+F3** until the initial **SAP R/3 System** screen is displayed.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10


You can use the Single Point of Entry for Ordering (ZM10 transaction) to order materials with a material number (Material Master item). The result will be either a reservation or a requisition.

The system will create a **reservation** for the allowable quantity from inventory (the STAT room in Materials Management) if the order is marked as STAT.

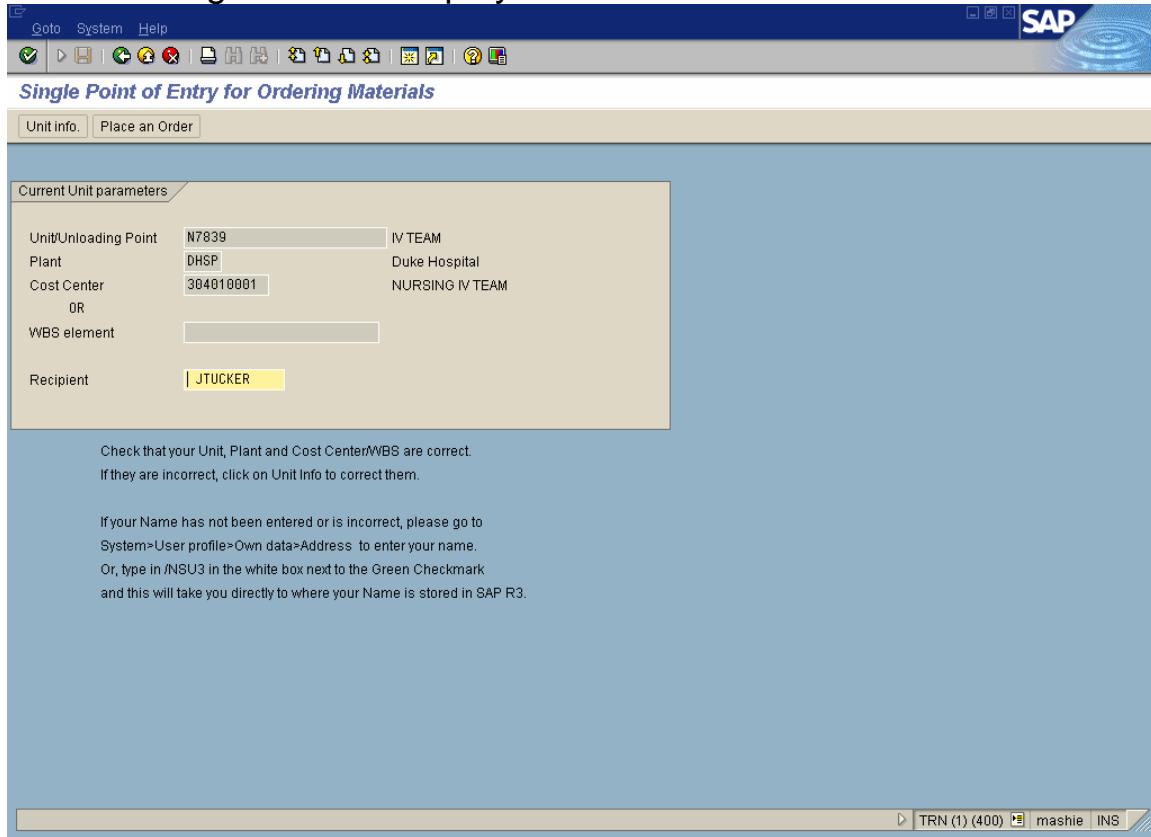
The system will create a **requisition** if you:

- have ordered a quantity that exceeds the allowable quantity stored in Materials Management,
- or, if the item is not in inventory and needs to be ordered from outside.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

1. Enter **ZM10** in the command window on the initial *SAP R/3 System* screen as shown. **ZM10** can be in upper or lower case.
2. Click on the  **Enter** button or press **Enter** to display the *Single Point of Entry for Ordering Materials* screen.

The following screen is displayed:



Current Unit parameters

Unit/Unloading Point	N7839	IV TEAM
Plant	DHSP	Duke Hospital
Cost Center	304010001	NURSING IV TEAM
OR		
WBS element		
Recipient	JTUCKER	

Check that your Unit, Plant and Cost Center/WBS are correct.
If they are incorrect, click on Unit Info to correct them.

If your Name has not been entered or is incorrect, please go to
System>User profile>Own data>Address to enter your name.
Or, type in /NSU3 in the white box next to the Green Checkmark
and this will take you directly to where your Name is stored in SAP R3.

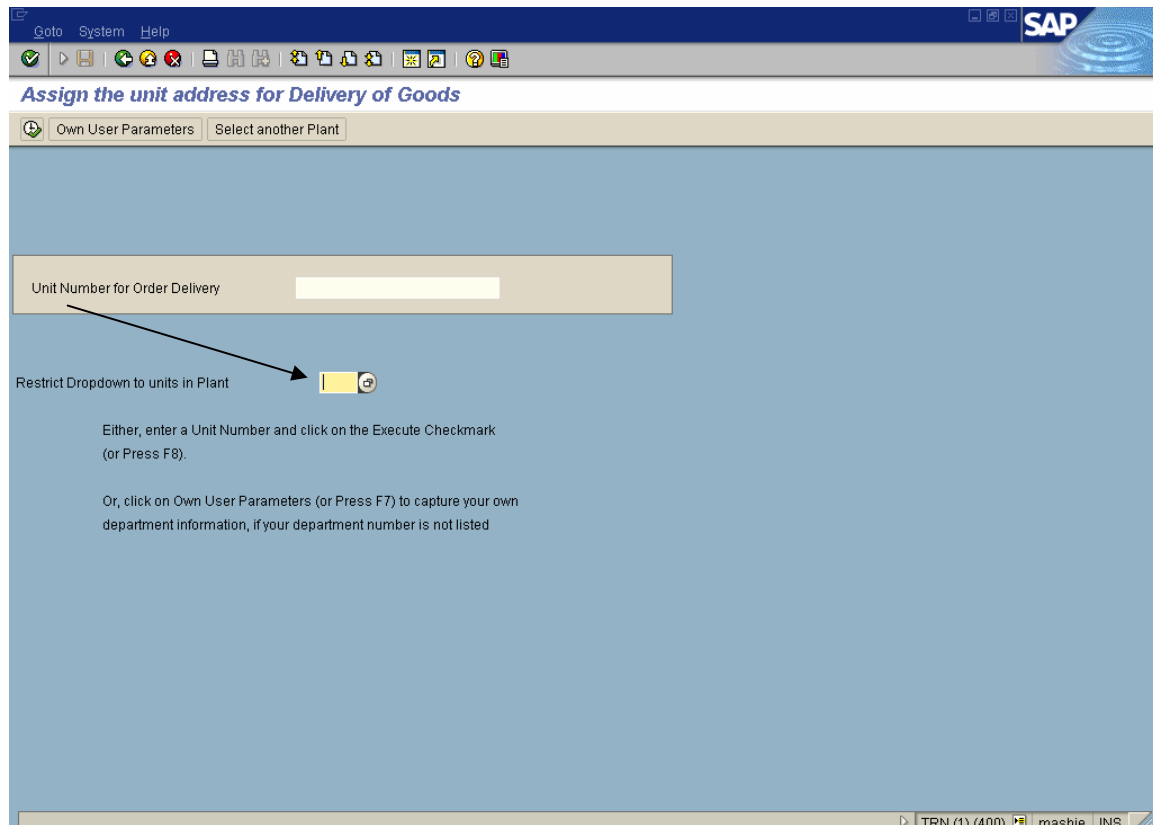
TRN (1) (400) mashie INS


Note: *The first time you log into ZM10, you will need to set up the **Recipient** or person's name who will receive the order (see step 3) and the **Unit** or delivery place (steps 4–19). If these fields are correct, go to step 20 to **Place An Order**.*

3. To set up the **Recipient**, just type the name in the **Recipient** field and hit **Enter** on your keyboard.
4. To add or change an address, click on the **Unit info** button (next to the Place an Order button) or press **F5** to display the *Assign the unit address for Delivery of Goods* screen.

The following screen is displayed:

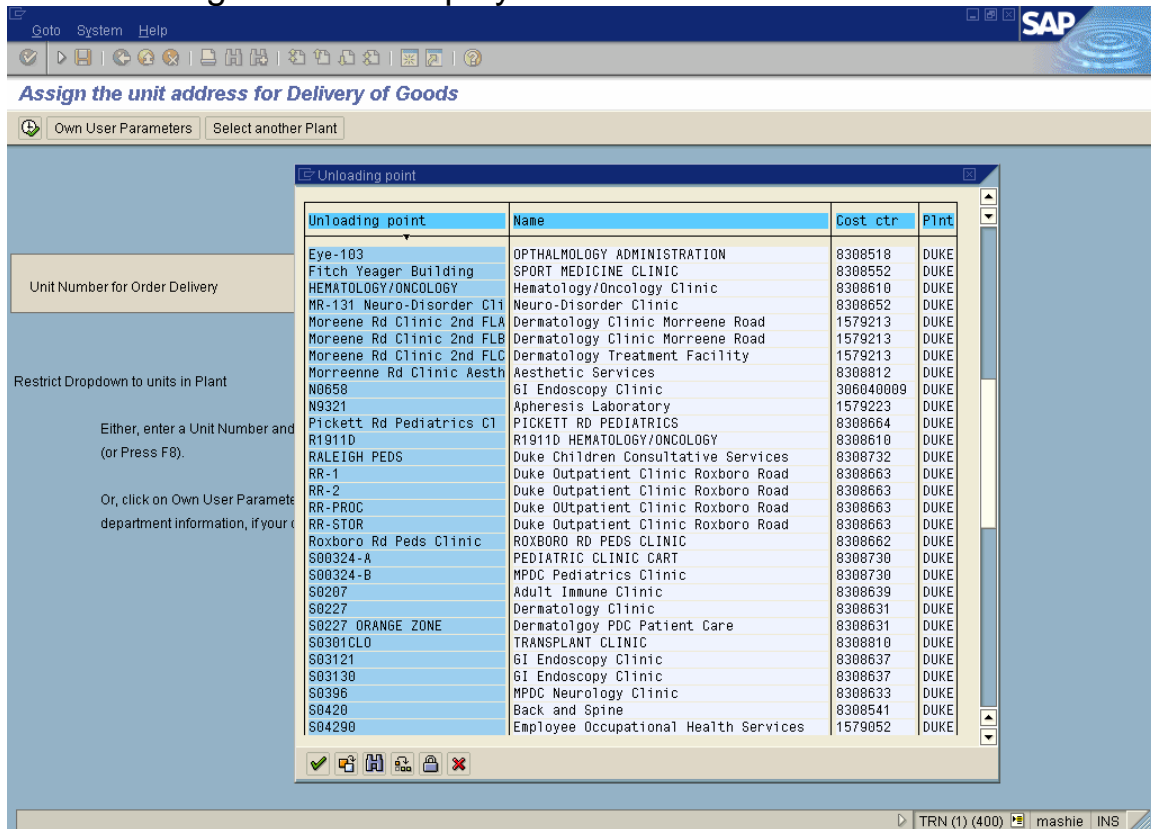
Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10



5. Click in the **Restrict dropdown to units in Plant** field; type in your plant or click on the drop-down box beside it and select the appropriate plant code by double-clicking on it.
6. To lock in the selected plant on the *Assign the unit address for Delivery of Goods* screen, click on either the  **Enter** or click on the **Select another Plant** button. You will not get a message.
7. Click in the **Unit Number for Order Delivery** field (above the Restrict dropdown field) and click on the drop-down to the right of that field to display the *Unloading point* screen.


Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

The following screen is displayed:



- Select the unit address for order delivery by double-clicking on it and proceed to Step 20.

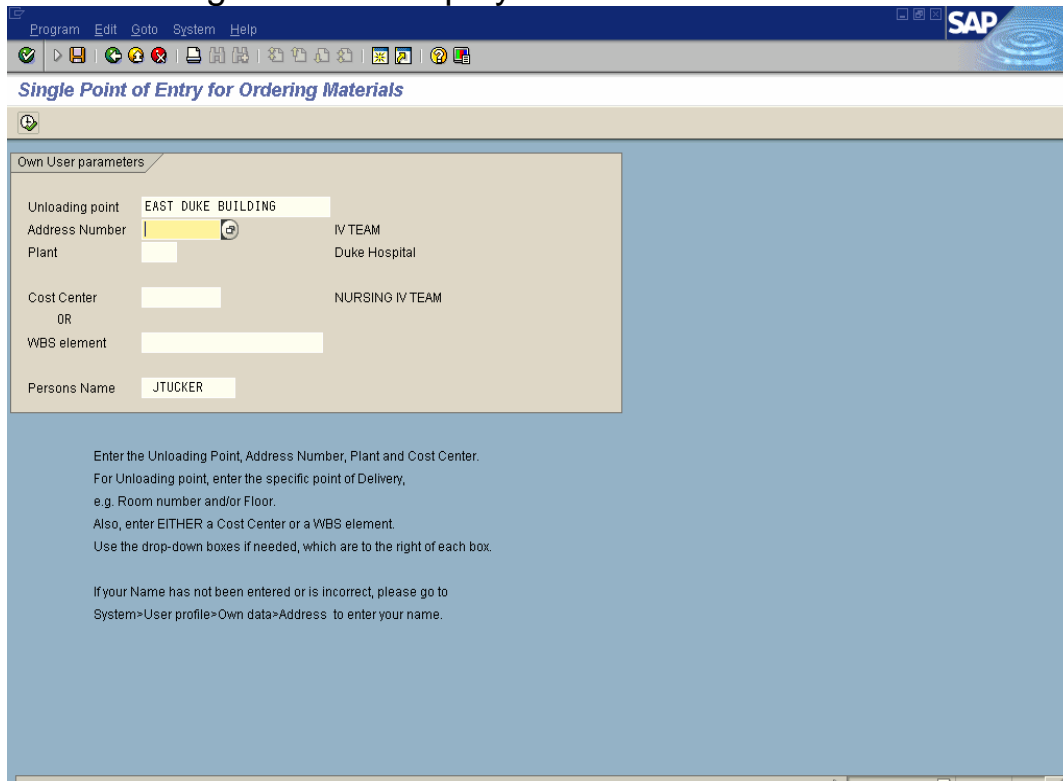
OR

If your unit address isn't in the list, click the  **Cancel** button or press **F12** to return to the *Assign the unit address for Delivery of Goods* screen.

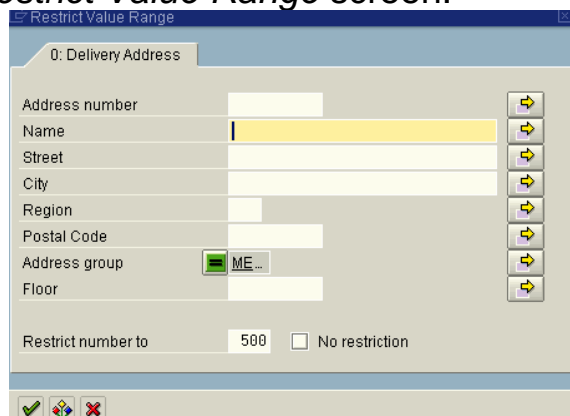
- Click on the **Own User Parameters** button to display the *Single Point of Entry for Ordering Materials* screen. This will allow you to enter an address that isn't yet included in the Unit Number for Order Delivery list.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

The following screen is displayed:




10. Enter a specific place for delivery (i.e., Room number, floor number) in the **Unloading point** field. In this example, the Unloading point is East Duke Building.
11. Click in the **Address Number** field and click on the drop down to display the *Restrict Value Range* screen:

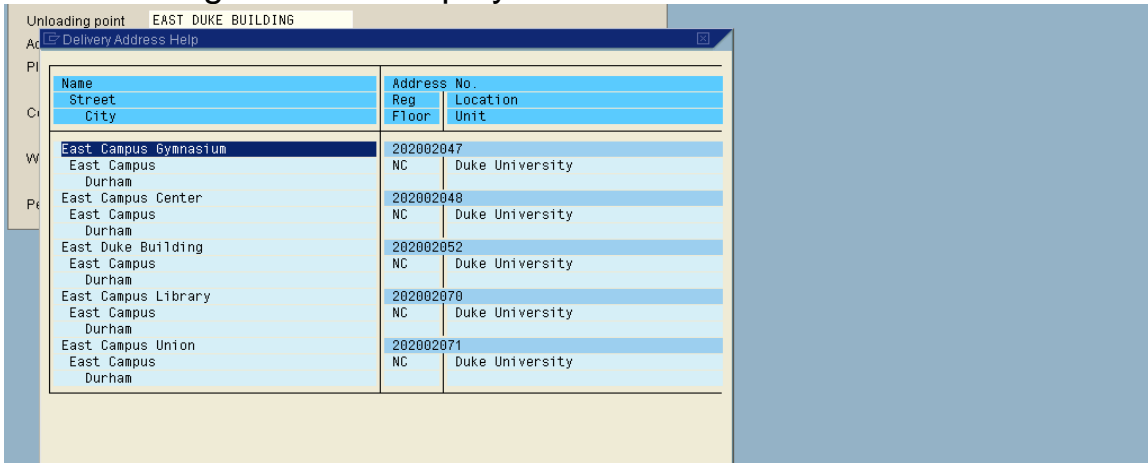


12. Type a department name or building name or part of one with an asterisk (*) before and after it in the Name field. For example, type ***East*** to find the East Duke building. The first letter in the name may need to be upper case.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

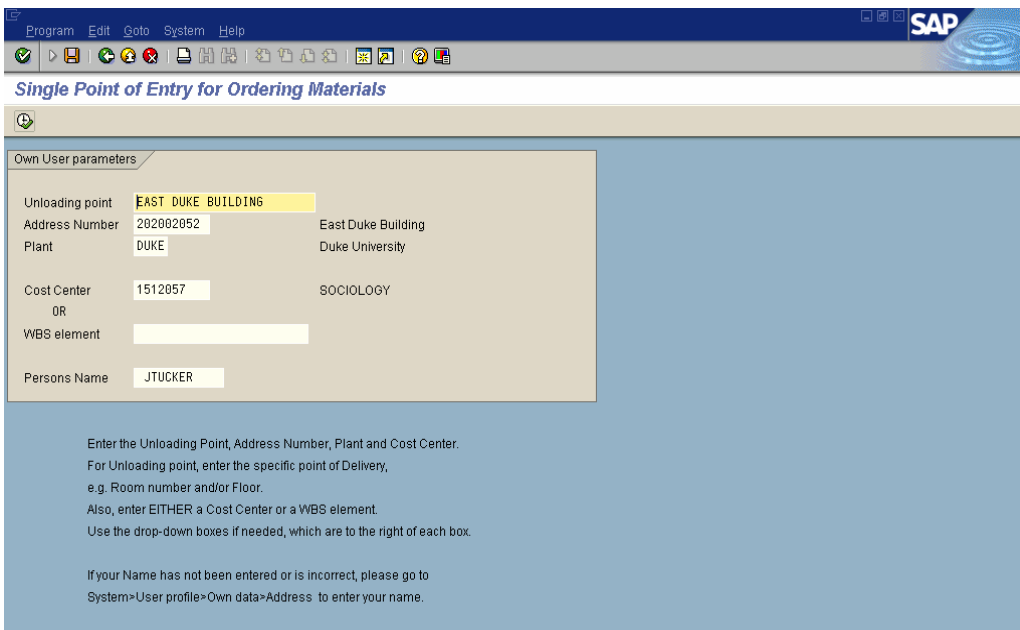
13. Click on the  **Continue** button or press **Enter** to display the *Number of delivery address* screen.


The following screen is displayed:



Name	Address No.	Reg	Location	Floor	Unit
East Campus Gymnasium	202002047	NC	Duke University		
East Campus Center	202002048	NC	Duke University		
East Duke Building	202002052	NC	Duke University		
East Campus Library	202002070	NC	Duke University		
East Campus Union	202002071	NC	Duke University		

14. Select your address from the list by double-clicking on the address line to display the *Single Point of Entry for Ordering Materials* screen. The address number should appear.



Program Edit Goto System Help 

Single Point of Entry for Ordering Materials

Own User parameters

Unloading point **EAST DUKE BUILDING**

Address Number **202002052** East Duke Building

Plant **DUKE** Duke University

Cost Center **1512057** SOCIOLOGY

OR

WBS element

Persons Name **JTUCKER**

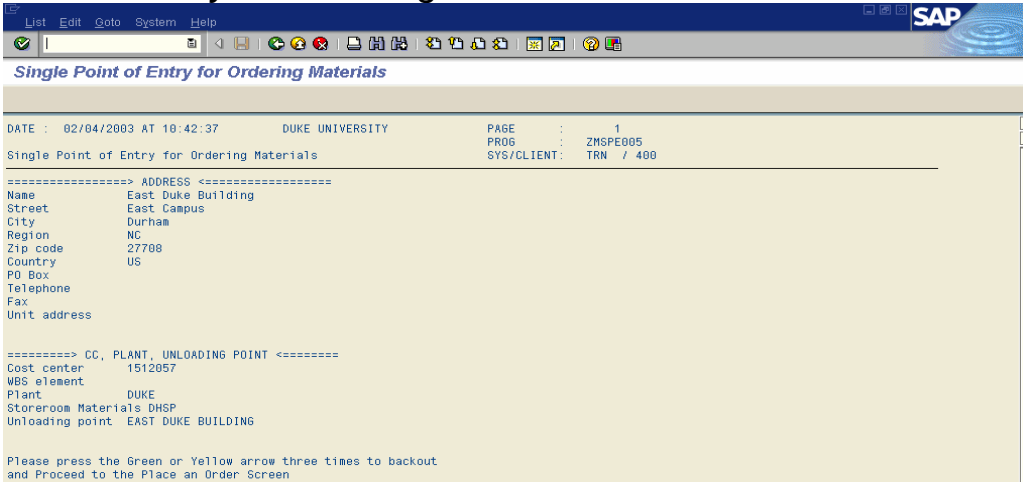
Enter the Unloading Point, Address Number, Plant and Cost Center.
For Unloading point, enter the specific point of Delivery,
e.g. Room number and/or Floor.
Also, enter EITHER a Cost Center or a WBS element.
Use the drop-down boxes if needed, which are to the right of each box.

If your Name has not been entered or is incorrect, please go to
System>User profile>Own data>Address to enter your name.

15. Enter the **appropriate plant** (for example, DUKE).
16. Enter either the **cost center** (or the WBS Element) in the appropriate field.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

17. Click on the  **Execute** button or press **F8** to display the *Single Point of Entry for Ordering Materials* screen.




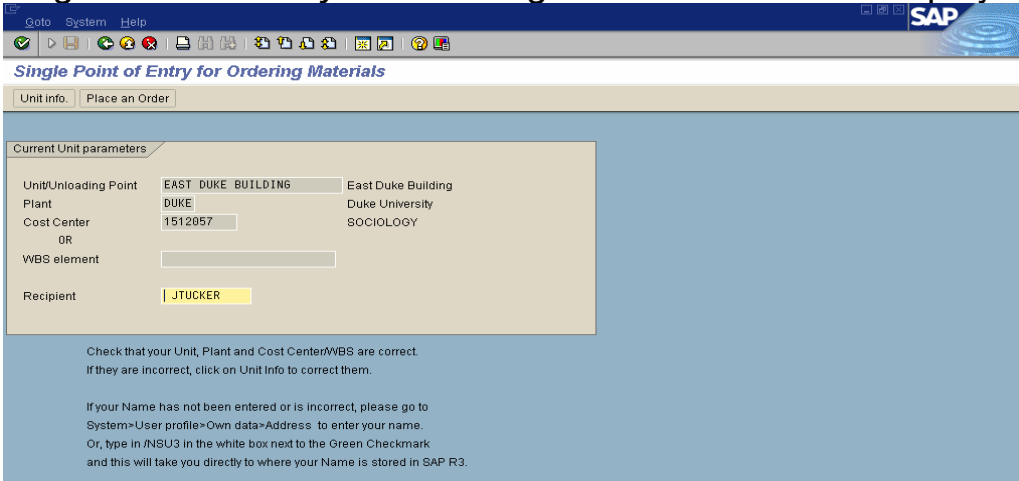
DATE : 02/04/2003 AT 10:42:37 DUKE UNIVERSITY PAGE : 1
 Single Point of Entry for Ordering Materials PROG : ZMSPE005
 SYS/CLIENT: TRN / 400

===== ADDRESS =====
 Name East Duke Building
 Street East Campus
 City Durham
 Region NC
 Zip code 27708
 Country US
 PO Box
 Telephone
 Fax
 Unit address

===== CC, PLANT, UNLOADING POINT =====
 Cost center 1512057
 WBS element
 Plant DUKE
 Storeroom Materials DHSP
 Unloading point EAST DUKE BUILDING

Please press the Green or Yellow arrow three times to backout
 and Proceed to the Place an Order Screen

18. Confirm that the address information is correct.
19. Click on the  **Exit** button or press **Shift+F3** until the **ZM10** or *Single Point of Entry for Ordering Materials* screen is displayed:



Goto System Help SAP

Single Point of Entry for Ordering Materials

Unit Info. | Place an Order

Current Unit parameters

Unit/Unloading Point	EAST DUKE BUILDING	East Duke Building
Plant	DUKE	Duke University
Cost Center	1512057	SOCIOLOGY
OR		
WBS element		
Recipient	JTUCKER	

Check that your Unit, Plant and Cost Center/WBS are correct.
 If they are incorrect, click on Unit Info to correct them.

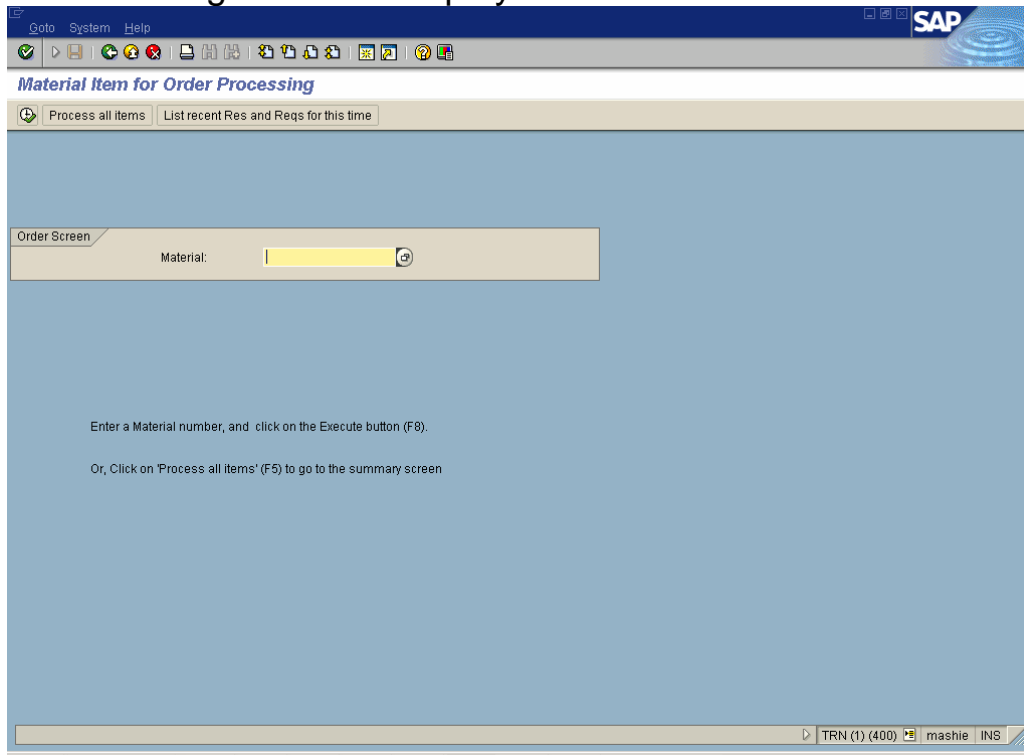
If your Name has not been entered or is incorrect, please go to
 System>User profile>Own data>Address to enter your name.
 Or, type in /NSU3 in the white box next to the Green Checkmark
 and this will take you directly to where your Name is stored in SAP R3.

Note: *The new information on this screen will be your delivery point unless you change it.*

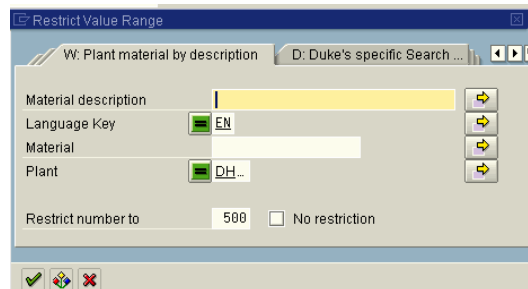
20. Click on the **Place an Order** button or press **F6** to display the *Material Item for Order Processing* screen.


Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

The following screen is displayed:




21. If you know the material number, enter the number. Otherwise, click in the **Material** field, then click on the drop-down box to the right to display the search box:



22. On the *Plant material by description* tab, type the **main singular noun** of the material to be ordered with an asterisk (*) before and after in the Material description field (Ex. ***cup*** or ***needle***).
23. Enter the appropriate plant (or select it from the dropdown box) in the Plant field.
24. Click on the  **Continue** button or press **Enter** to display the *Material number* screen.

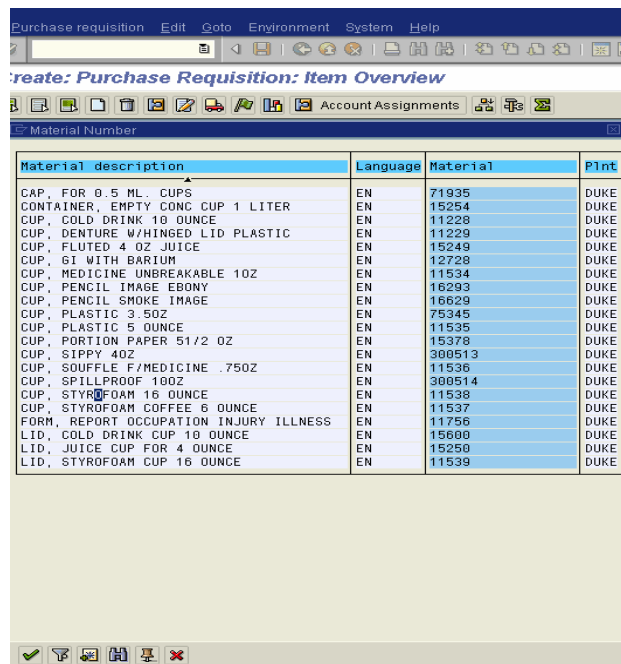
Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

25. Remember that you can create a personal list of materials by clicking **once** on the desired material to highlight it and clicking on the  **Insert in personal list** button at the bottom of the box. The cursor will jump down one item.

Note: The next time you click on the drop-down in the Material field, you will see the item in your Personal Value List:

Material description	Language	Material	Plnt
CUP, STYROFOAM 16 OUNCE	EN	11538	DUKE

26. To select the material you want for the current order, click it again to highlight it.

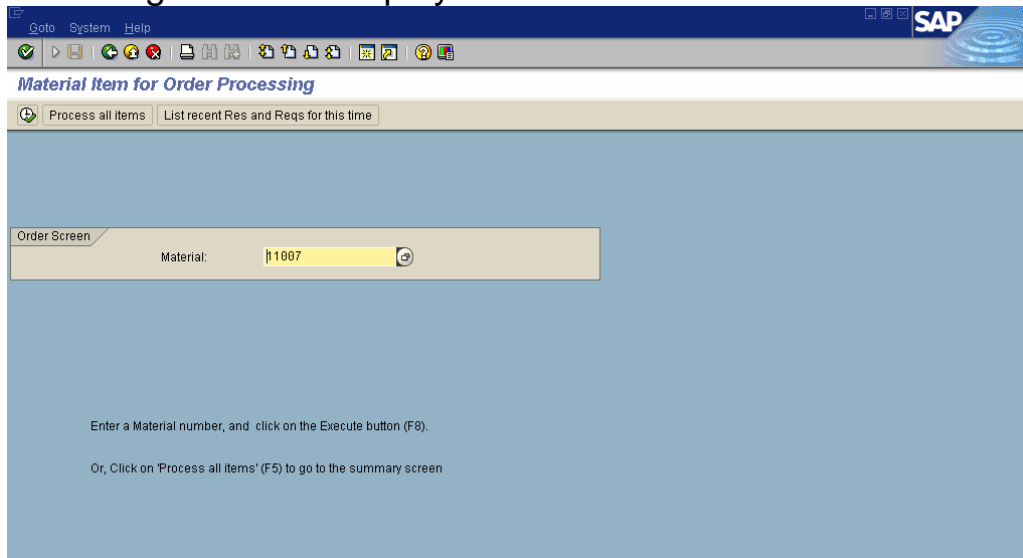



Material description	Language	Material	Plnt
CAP. FOR 0.5 ML. CUPS	EN	71935	DUKE
CONTAINER, EMPTY CONC CUP 1 LITER	EN	15254	DUKE
CUP, COLD DRINK 10 OUNCE	EN	11228	DUKE
CUP, DENTURE W/HINGED LID PLASTIC	EN	11229	DUKE
CUP, FLUTED 4 OZ JUICE	EN	15249	DUKE
CUP, GI WITH BARIUM	EN	12728	DUKE
CUP, MEDICINE UNBREAKABLE 10Z	EN	11534	DUKE
CUP, PENCIL IMAGE EBONY	EN	16293	DUKE
CUP, PENCIL SMOKE IMAGE	EN	16629	DUKE
CUP, PLASTIC 3.5OZ	EN	75345	DUKE
CUP, PLASTIC 5 OUNCE	EN	11535	DUKE
CUP, PORTION PAPER 5 1/2 OZ	EN	15378	DUKE
CUP, SIPPY 4OZ	EN	300513	DUKE
CUP, SOUFFLE F/MEDICINE .75OZ	EN	11536	DUKE
CUP, SPILLPROOF 10OZ	EN	300514	DUKE
CUP, STYROFOAM 16 OUNCE	EN	11538	DUKE
CUP, STYROFOAM COFFEE 6 OUNCE	EN	11537	DUKE
FORM, REPORT OCCUPATION INJURY ILLNESS	EN	11756	DUKE
LID, COLD DRINK CUP 10 OUNCE	EN	15600	DUKE
LID, JUICE CUP FOR 4 OUNCE	EN	15250	DUKE
LID, STYROFOAM CUP 16 OUNCE	EN	11539	DUKE


27. Click on the  **Copy** button or press **Enter** to display the *Material Item for Order Processing* screen (see next page).

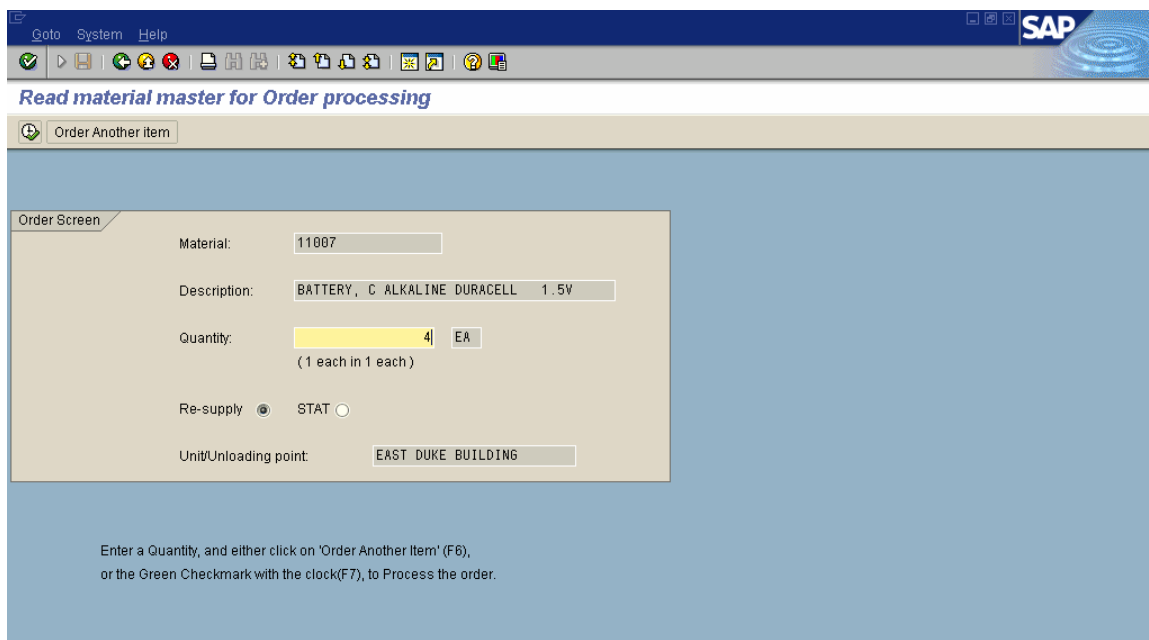
Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

The following screen is displayed:



28. *Optional:* to see if this item has already been ordered today to avoid duplicating, click on the **List today's Res and Reqs for this item** button or press **F6**. To go back to the previous screen, click once on the  **Back** button.


29. Click on the  **Execute** button or press **F8** to display the *Read material master for Order processing* screen:



Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10

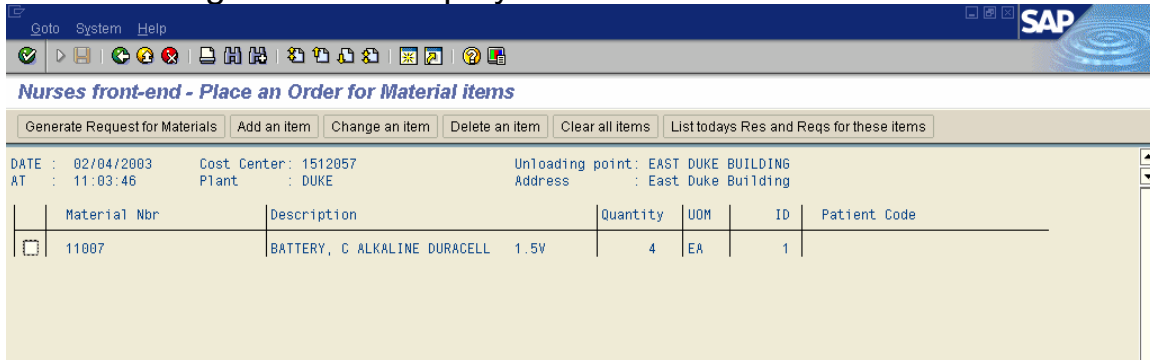
30. Enter the Quantity needed. In this example, the Quantity is 4.
(Note the unit of measure information).

Note: The **STAT** button usually defaults (at DRHS the Resupply button defaults); if the order is a resupply, click on the **Re-supply** button.

30. Click on the  **Process all items** button or press **F7** to display the *Place an Order for Material Items* screen to view the summary.

Note: An option on this next screen is to press the **Order Another item** button. This action returns you to the Read material master for Order processing screen to allow additional items to be added to the order.

The following screen is displayed:



Nurses front-end - Place an Order for Material items

Generate Request for Materials | Add an item | Change an item | Delete an item | Clear all items | List today's Res and Reqs for these items

DATE : 02/04/2003 Cost Center : 1512057 Unloading point: EAST DUKE BUILDING
 AT : 11:03:46 Plant : DUKE Address : East Duke Building

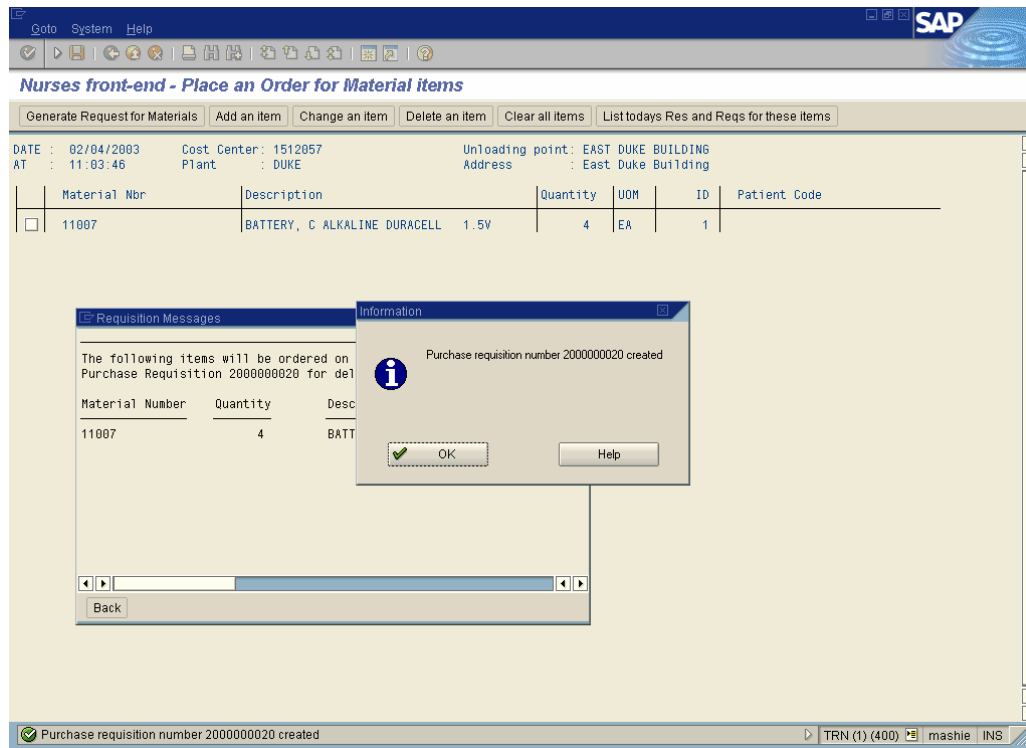
	Material Nbr	Description	Quantity	UOM	ID	Patient Code
<input type="checkbox"/>	11007	BATTERY, C ALKALINE DURACELL 1.5V	4	EA	1	



31. Click on the **Generate Request for Materials** button to process the order.

Note: The other options are: **Add an item, Change an item, Delete an item, Clear all items, and List today's Res and Reqs for these items.** To change or delete items, you must first place a check in the box to the left of each item before clicking on the button.

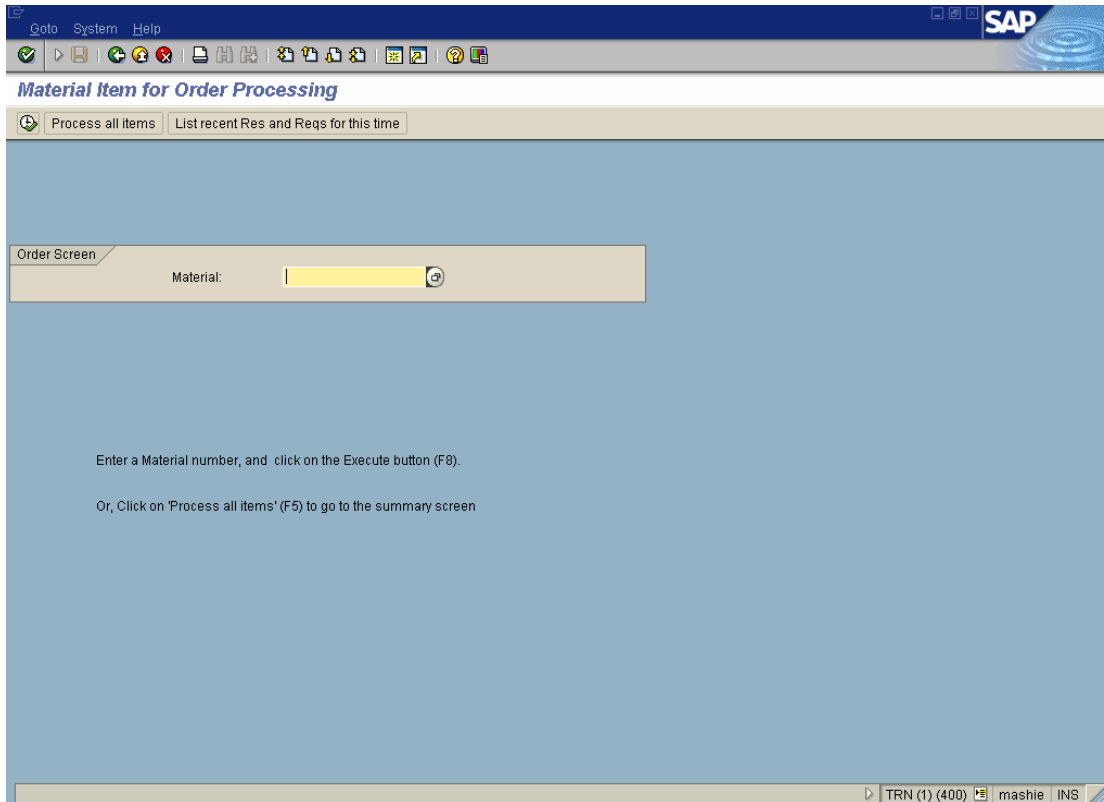
The following screen is displayed:

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10





32. A reservation, a requisition, or a combination of each will be generated, depending on the request and the inventory allotment.
33. Click on the  **OK** button or press **Enter** on the *Information* screen.
34. Click on the  **Back** button on the *Reservation (or Requisition) created NNNNNNNNNN* screen or press **Enter** until the *Material Item for Order Processing* screen is displayed again.

Single Point of Entry for Ordering Materials STAT and Re-supply: ZM10



35. If desired, another order may be placed by repeating the steps beginning at Step 21.

Note: If you created a Personal Values list, the next time you click on the Material dropdown, the Personal Values list will display. If you are ordering an item not on your list, click on the  **All Values** button to get to the **W** search.

36. After completing all orders, click on the  **Exit** button or press **Shift+F3** until the initial R/3 screen is displayed.