REQUISITION ENTRY IN S A P – ME51N

There are three “sections” to the Requisition.

Top: **Header**

Middle: **Item Overview**

Bottom: **Item Detail**

Begin in the *Item Overview* section. Fields to complete:

1. **ST** --- Leave Blank, hit Tab
2. **Item** --- Leave Blank, hit Tab
3. **Account Assignment** ..... enter “K”, then hit Tab (see dropdown to select Grant or Project money)
4. **Item Category** --- Leave Blank, except for “SERVICES”, then enter “D”.
5. **Material Group** – Use drop down – select what best describes the item to be ordered.
6. **Short Text** – Enter Part # then a brief description of the item (there are 40 characters allowed) – continuance of the item description can be completed under the “Text” tab of the “Item Details” section for each line item.
7. **Quantity** – Enter the total amount for that line item to be ordered.
8. **Unit of Measure** – Enter how the unit is sold; i.e. ea, dz, st, etc. – see drop down
9. **Delivery Date** - 2-6 weeks out from date of entry or Vendor’s quoted delivery date
10. **Valuation Price** – The price per unit of issue.
11. **Total Value** – leave blank, this will fill in automatically
12. **Tracking Number** – Used for referencing renewals: outline agreement #’s, prior year PO and Service Contract (SP) numbers. **OR** as a work order against an SPC, enter the contract number as a reference.
13. **Purchasing Group**..... Always use “300”; **Plant** “30”; **POrg** “locl”
14. **Requisitioner**..... can use phone ext, name, or leave blank
15. **Outline Agreement**….. Leave blank unless ordering from an existing Outline agreement (Buses, Advertising, etc.)- enter that contract number as a reference. **Item** – line # of the Outline Agreement (usually “1”)
17. **Desired Vendor** - Use drop down to perform search (search tab must be “Vendors/Purchasing”) – easiest to search by Zip Code; i.e. “18301*” make certain to place an asterisk at the end to capture all possibilities.

**ITEM DETAIL SECTION (bottom of PR)**

18. **Account Assignment** tab (use drop down if you do not see it)
Only fill in: **Unloading point – Recipient – GL Account – Cost Center** (Note: if you had entered a “G” for Grant or “P” for Project, in the Item Category of the Item Overview Section, then a WBS Element number would need to be entered (ends with a “.1” at the end of the cost center) – The other areas will fill in automatically.

19. **<click>** the “Texts” tab. **<click>** “Item Text” (on left) to enter additional description for the line item. Again, this is a continuation of the short text above in section 2 and the continuation is only for each individual line item above. Each line item is separate.

  **<click>** “Item Notes” to provide the Vendor’s Name, Address, phone, fax, and email, if unable to locate the Vendor under the **Desired Vendor** search in Section 2 – or you can list vendors for purchasing to send quotes to (if you have not already got a quote) or a note to purchasing. What you put in this section does not carry over to the Purchase Order when Purchasing creates it.

**CHECKING THE PR FOR ERRORS**

**<click>** on the “Check” icon near the top – if no error messages (red dot), **<click>** “Save” at the top of the page. A PR number will appear at the bottom of the page… write the number down to reference later. The PR has now been routed to the authorized person for Release. Once fully Released, the PR will be routed to Procurement for processing.
1. **Release**: once the PR has been saved, a “Release Strategy” tab will appear in the bottom section listing all Releasers – each line must be Released individually. The number of Releasers is dependent upon the total cost for each line:

- under $5,000: one Releaser
- $5k - $9,999: Dept. Chair and Comptroller
- over $10,000: Dept. Chair, Comptroller, and VP of Finance

**Example of two Releasers:**

- As each Releaser releases each line, a ✓ will appear next to their name. If a ⚠ is displayed, that person has yet to release the line.

2. **PO/SPC # Assignment**: If all documentation needed (quotes, Scope of Work, etc.) have been attached to the PR and Request for Quotes or Bids have been completed, a PO/SPC will be issued and its number displayed under the “Status” tab of the PR:
3. **PO/SPC Release:** PO’s and SPC’s exceeding $5,000 will require multiple releases before the PO can be issued and forwarded to the Vendor.

- SPC’s require the Contractor’s signature and release by Procurement
- If the SPC is $5k - $19,099, Legal Counsel will be added as a Releaser.
- All SPC’s greater than $19,099 will require signatures from the following: Contractor Procurement Comptroller Legal Counsel Attorney General