



**Office of Procurement &
Strategic Sourcing**

REQ TO CHECK USER GUIDE



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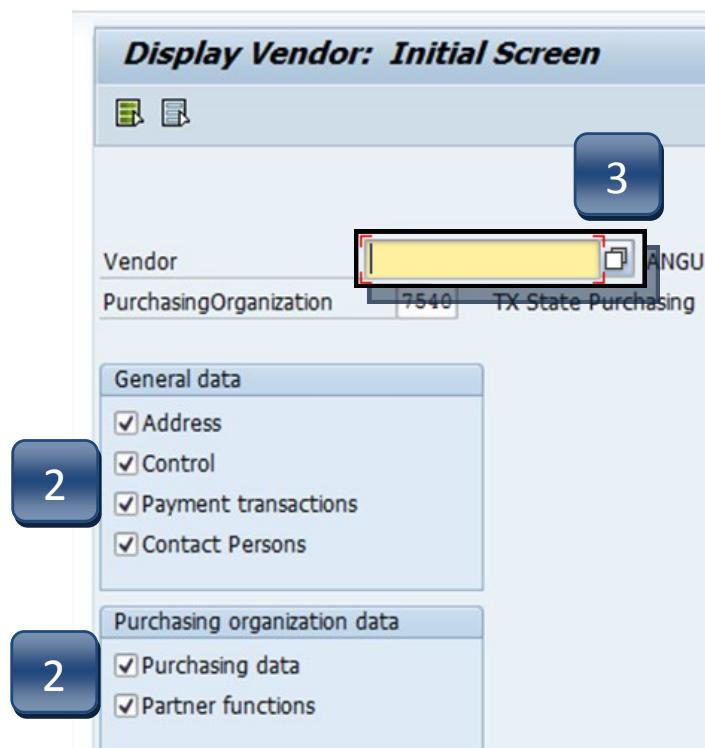
Search for Existing Vendor

STEP 1: Enter transaction code **ZMK03** in main menu search field.
Hit **Enter** on your keyboard.



STEP 2: Check all boxes in **General data** and **Purchasing organization data** sections.

STEP 3: Place cursor in **Vendor** field, then click the box icon that appears at the end of the field:



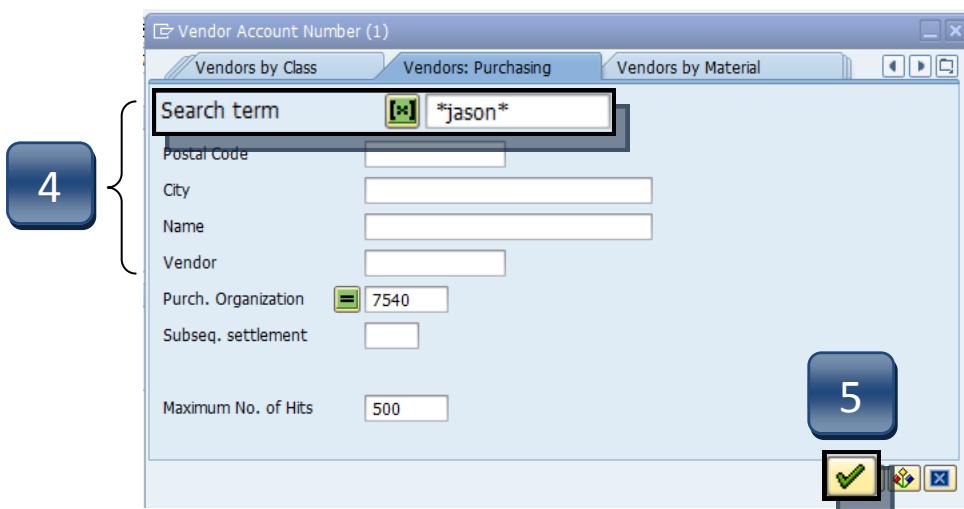
Search for Existing Vendor

STEP 4: Enter your search terms in any of the fields.

**Use *Asterisks* to include more results in your search. Words can be truncated.

Search term is a commonly-used search field.

STEP 5: Click the green check button or hit ENTER.



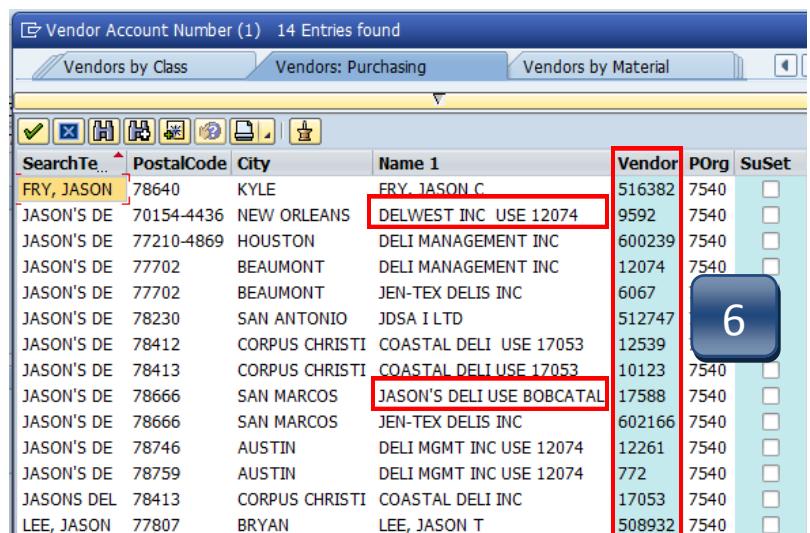
STEP 6: A listing of all the vendors with the term *jason* in their profile for the field you searched will appear. **Vendor number is located in the Vendor column; this number is required for requisition entry.** To view more information about a particular vendor, double-click vendor number and proceed to **STEPS 7 & 8.**



- NOTE -

Any "useothernumber" or "use BOBCATalog/TSUS MarketPlace" tags in the vendor search:

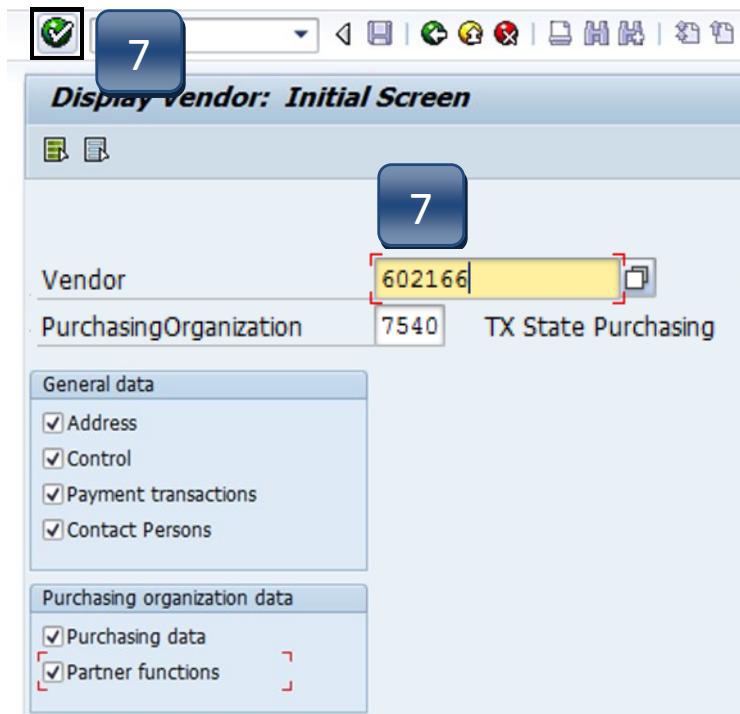
- If the record references another vendor number, use the referenced number.
- If the record notifies you that this is a *BOBCATalog/TSUS* vendor, please enter the requisition through **BOBCATalog/TSUS MarketPlace!**



SearchTe...	PostalCode	City	Name 1	Vendor	POrg	SuSet
FRY, JASON	78640	KYLE	FRY, JASON C	516382	7540	<input type="checkbox"/>
JASON'S DE	70154-4436	NEW ORLEANS	DELWEST INC USE 12074	9592	7540	<input type="checkbox"/>
JASON'S DE	77210-4869	HOUSTON	DELI MANAGEMENT INC	600239	7540	<input type="checkbox"/>
JASON'S DE	77702	BEAUMONT	DELI MANAGEMENT INC	12074	7540	<input type="checkbox"/>
JASON'S DE	77702	BEAUMONT	JEN-TEX DELIS INC	6067	7540	<input type="checkbox"/>
JASON'S DE	78230	SAN ANTONIO	JDSA I LTD	512747	7540	<input type="checkbox"/>
JASON'S DE	78412	CORPUS CHRISTI	COASTAL DELI USE 17053	12539	7540	<input type="checkbox"/>
JASON'S DE	78413	CORPUS CHRISTI	COASTAL DELI USE 17053	10123	7540	<input type="checkbox"/>
JASON'S DE	78666	SAN MARCOS	JASON'S DELI USE BOBCATAL	17588	7540	<input type="checkbox"/>
JASON'S DE	78666	SAN MARCOS	JEN-TEX DELIS INC	602166	7540	<input type="checkbox"/>
JASON'S DE	78746	AUSTIN	DELI MGMT INC USE 12074	12261	7540	<input type="checkbox"/>
JASON'S DE	78759	AUSTIN	DELI MGMT INC USE 12074	772	7540	<input type="checkbox"/>
JASONS DEL	78413	CORPUS CHRISTI	COASTAL DELI INC	17053	7540	<input type="checkbox"/>
LEE, JASON	77807	BRYAN	LEE, JASON T	508932	7540	<input type="checkbox"/>

Search for Existing Vendor

STEP 7: Once you have double-clicked a vendor it will be added to the search field. Click the green check button in the top left corner to view vendor information screen:



7

Vendor: 602166

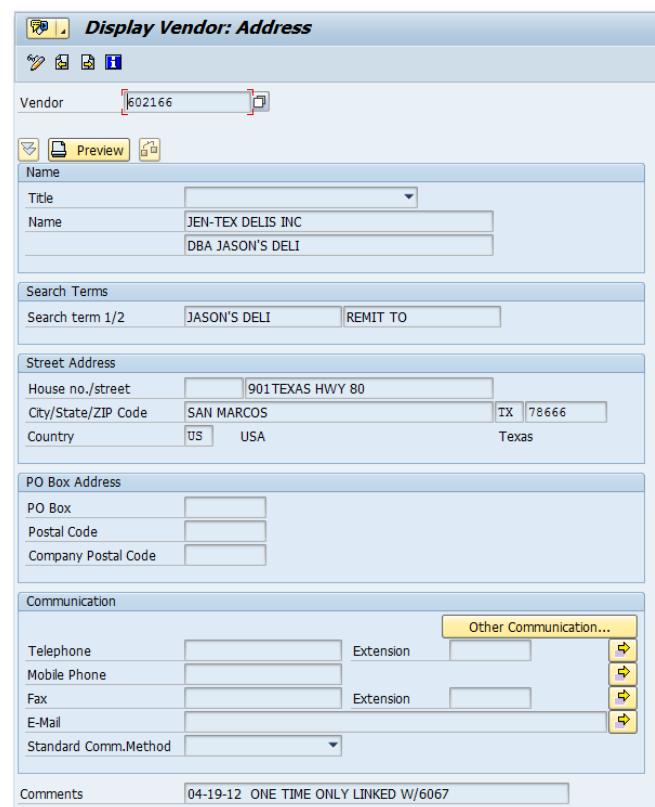
Purchasing Organization: 7540 TX State Purchasing

General data

- Address
- Control
- Payment transactions
- Contact Persons

Purchasing organization data

- Purchasing data
- Partner functions



7

Vendor: 602166

Name

Title:

Name: JEN-TEX DELIS INC
DBA JASON'S DELI

Search Terms

Search term 1/2: JASON'S DELI | REMIT TO

Street Address

House no./street: 901 TEXAS HWY 80

City/State/ZIP Code: SAN MARCOS TX 78666

Country: US USA Texas

PO Box Address

PO Box:
Postal Code:
Company Postal Code:

Communication

Telephone: Extension:
Mobile Phone:
Fax: Extension:
E-Mail:
Standard Comm. Method:

Comments: 04-19-12 ONE TIME ONLY LINKED W/6067

STEP 8: To return to the main menu, select the **Back** button twice.



If vendor is not found using the ZMK03 search, proceed to [Request Vendor Setup](#) sections.

Request Vendor Setup: Non-TX State Employee/Student

STEP 1: Vendors that are not Texas State employees or students should complete the [FS01 Vendor Maintenance form](#) and submit to Purchsing Office:

Mail: 601 University Drive
JC Kellam Building, Suite 527
San Marcos, TX 78666

E-mail: vendorrequests@txstate.edu



Form Completion

- Vendor must complete form and *sign*:
Sections C or D, and E.

SECTION D - ELECTRONIC PAYMENT EXEMPTION: I claim exemption and request payment by state warrant (check) because: <input type="text"/>	
X	Authorized signature <input type="text"/>
Printed name <input type="text"/>	Date <input type="text"/>
SECTION E - SUBSTITUTE W-9 (Required by U.S. Persons only):	
Under penalties of perjury I certify that (1) my number shown on this form is my correct taxpayer identification number or I am waiting for a number to be issued to me and (2) I am not subject to backup withholding due to failure to report interest and dividend income and (3) I am a U.S. person.	
Taxpayer identification Number <input type="text"/>	Federal Employer Identification Number: <input type="text"/> or Social Security Number: <input type="text"/>
The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.	
X	Authorized signature <input type="text"/>
Printed name <input type="text"/>	Date <input type="text"/>
SECTION F - TEXAS STATE DEPARTMENT CONTACT INFORMATION:	
Contact Name <input type="text"/>	Phone (512) <input type="text"/>
Department Name <input type="text"/>	Email <input type="text"/> @brstate.edu
Action: <input type="radio"/> New Vendor Setup <input type="radio"/> Change <input type="radio"/> Delete	If change or delete, SAP Vendor Number <input type="text"/>

If you have questions, contact the Purchasing Office at (512) 245-2521.

Request Vendor Setup: TX State Student Worker

STEP 1: Complete the online [FS02 Vendor Maintenance form](#) to add a current Texas State student worker as a vendor.

Section A - Vendor General Information

Student/Employee Id (i.e. A00XXXXXX) *

Name *

Section B - Requesting Department Information

Requestor Name *

Requestor Phone *

Email *



Form Completion

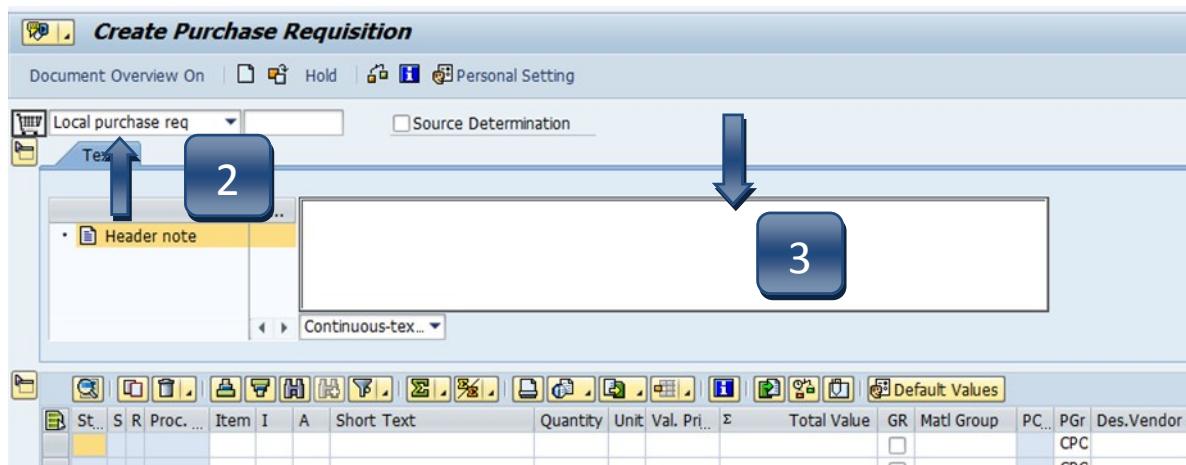
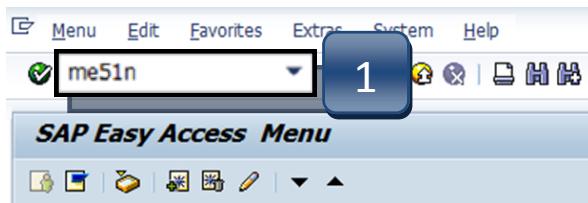
- As part of the [TRAVELTracks](#) implementation, ALL current faculty & staff are set up as vendors. Please allow time for a new employee record to be created in the system.

If you have questions, contact the Purchasing Office at (512) 245-2541.

Create a Local Requisition

Used for requests for goods only

STEP 1: Enter transaction code **ME51N** in main menu search field.
Hit **Enter** on your keyboard.

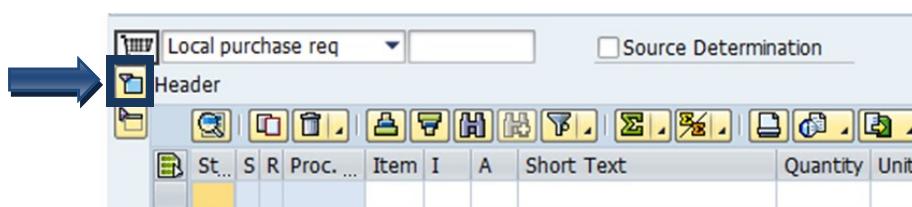


STEP 2: Verify that **Local purchase req** is selected as document type.

STEP 3: In **Header note** section add:

- Note giving clear explanation of the purchase. What are you purchasing?
Example: Furniture for Boko Room
- **Part Numbers**
- **CONTRACTS/CONSORTIUMS** you are buying off of. (TXMAS, E&I, etc.)
- Other instructions, e.g. needing a check cut or vendor requests deposit.
- Requisitioner or Department contact information

If header section is not visible, click **Expand Header button to display.



Create a Local Requisition - Line Items



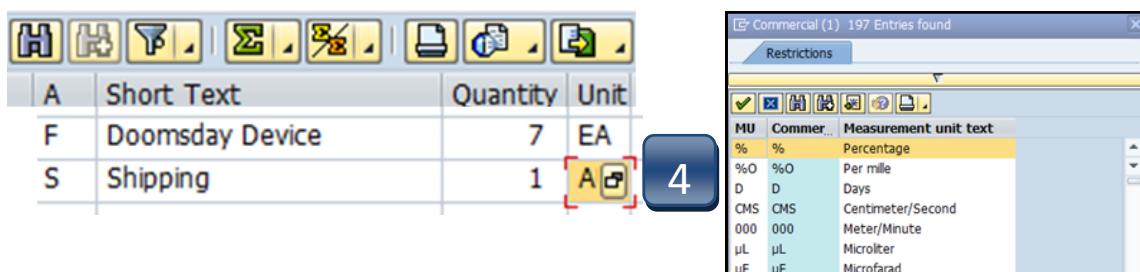
St...	S	R	Proc...	Item	I	A	Short Text	Quantity	Unit
						A	Death Star Plans	2	EA
						K	Zombie Survival Guidebook	15	EA
						F	Doomsday Device	7	EA
						S	Shipping	1	AU

STEP 1: **A (Account Assignment Category) column:** Enter **K (Cost Center), F (Internal Order), or S (Statistical Order)** for each line item. (Use down arrow on keyboard to move between lines.)

STEP 2: **Short Text column:** Enter item short text (What you are purchasing).

STEP 3: **Quantity column:** Enter quantity. (1 if using AU as Unit of Measure.)

STEP 4: **Unit of Measure column:** Enter unit of measure code. If unknown, use the database search for available options. (Click the button in the lower right corner of the field.)



A	Short Text	Quantity	Unit
F	Doomsday Device	7	EA
S	Shipping	1	A

Commercial (1) 197 Entries found

Restrictions

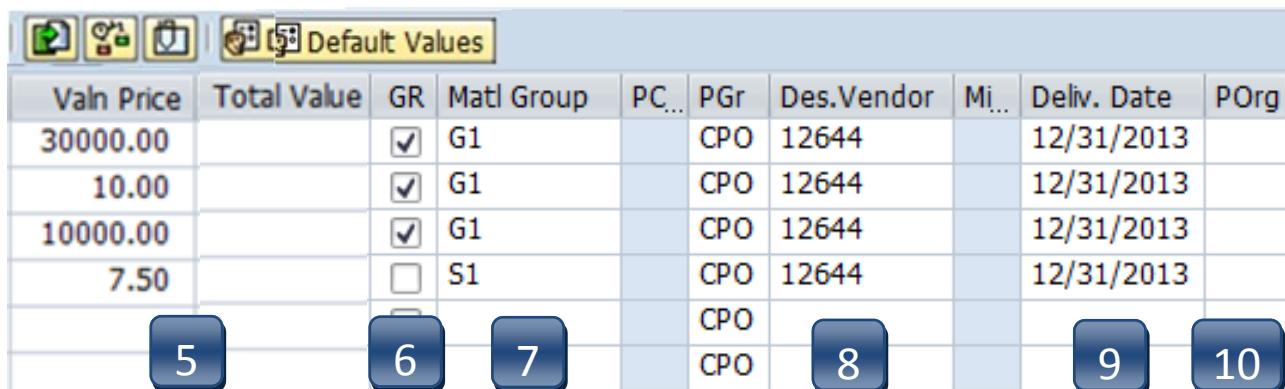
MU	Commer...	Measurement unit text
%O	%O	Per mille
D	D	Days
CMS	CMS	Centimeter/Second
000	000	Meter/Minute
µL	µL	Microliter
µF	µF	Microfarad



Unit of Measure

- EA will be used most often.
- If line item is for a *Service* such as shipping or an extra fee, use AU.
- If all lines are *Services*, stop building requisition as Local and create as a Framework or Limit Framework.

Create a Local Requisition - Line Items



The screenshot shows a table with 10 numbered steps (5-10) overlaid on it. The table has columns for Valn Price, Total Value, GR, Matl Group, PC..., PGr, Des.Vendor, Mi..., Deliv. Date, and POrg. The first four rows show data: Valn Price 30000.00, Total Value 10.00, GR checked, Matl Group G1, PGr CPO, Des.Vendor 12644, Deliv. Date 12/31/2013; Valn Price 10.00, Total Value 10.00, GR checked, Matl Group G1, PGr CPO, Des.Vendor 12644, Deliv. Date 12/31/2013; Valn Price 10000.00, Total Value 7.50, GR checked, Matl Group G1, PGr CPO, Des.Vendor 12644, Deliv. Date 12/31/2013; Valn Price 7.50, Total Value 7.50, GR unchecked, Matl Group S1, PGr CPO, Des.Vendor 12644, Deliv. Date 12/31/2013. Step 5 is over the Valn Price column, Step 6 is over the Total Value column, Step 7 is over the GR column, Step 8 is over the Matl Group column, Step 9 is over the PGr column, and Step 10 is over the Des.Vendor column.

Valn Price	Total Value	GR	Matl Group	PC...	PGr	Des.Vendor	Mi...	Deliv. Date	POrg
30000.00		<input checked="" type="checkbox"/>	G1		CPO	12644		12/31/2013	
10.00		<input checked="" type="checkbox"/>	G1		CPO	12644		12/31/2013	
10000.00		<input checked="" type="checkbox"/>	G1		CPO	12644		12/31/2013	
7.50		<input type="checkbox"/>	S1		CPO	12644		12/31/2013	
					CPO				
					CPO				

STEP 5: **Valuation Price column:** Enter the price per item.

****Total Value column** will populate when all line items have been entered.

If Total Value is \$5,000 or greater, you must attach justification documentation to the requisition. (See Attaching a Document section.)

STEP 6: **GR column:** Place a checkmark in the Goods Receipt column if you will be receiving a *tangible* item. Do not check this box if the line is for a *Service* such as shipping or a fee associated with the goods purchase.

STEP 7: **Material Group column:** Enter **G1** for Goods, Supplies, & Equipment or **S1** for Services. Use the drop-down menu for additional options.

STEP 8: **Desired Vendor column:** If known, enter the vendor number. If unknown, use the database to search by clicking the box in the bottom right corner. (See **Search for Existing Vendor** section for instructions.)



****Vendor number should be the same on ALL lines. A requisition should not have more than one vendor number.**

STEP 9: **Delivery Date column:** Enter date goods will be delivered (mm/dd/yyyy).

STEP 10: **POrg column:** Leave blank.

****7540** should populate once all STEPS are complete.

Create a Local Requisition - Line Items

Default Values							
Stor. Loc.	Plant	D...	Auto...	TBPC ...	TBPC ...	Tracking...	Requisnr.
JCKP	Texas State U	NB				bnb57	ja14
JCKP	Texas State U	NB				bnb57	ja14
JCKP	Texas State U	NB				bnb57	ja14
JCKP	Texas State U	NB				bnb57	ja14
	Texas State U	NB					
	Texas State U	NB					
	Texas State U	NB					

11 12 13

STEP 11: Storage Location column: Use the database search menu to select the storage location if you do not know the code for the location.

STEP 12: Tracking Number column: Enter your NetID.

STEP 13: Requisitioner column: Enter the NetID of the person for whom you are creating the requisition.

****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-13 as many times as necessary.**

STEP 14: Hit **ENTER** on your keyboard to generate the **Item Tabs** section.

Create a Local Requisition - Item Tab Detail

Tip

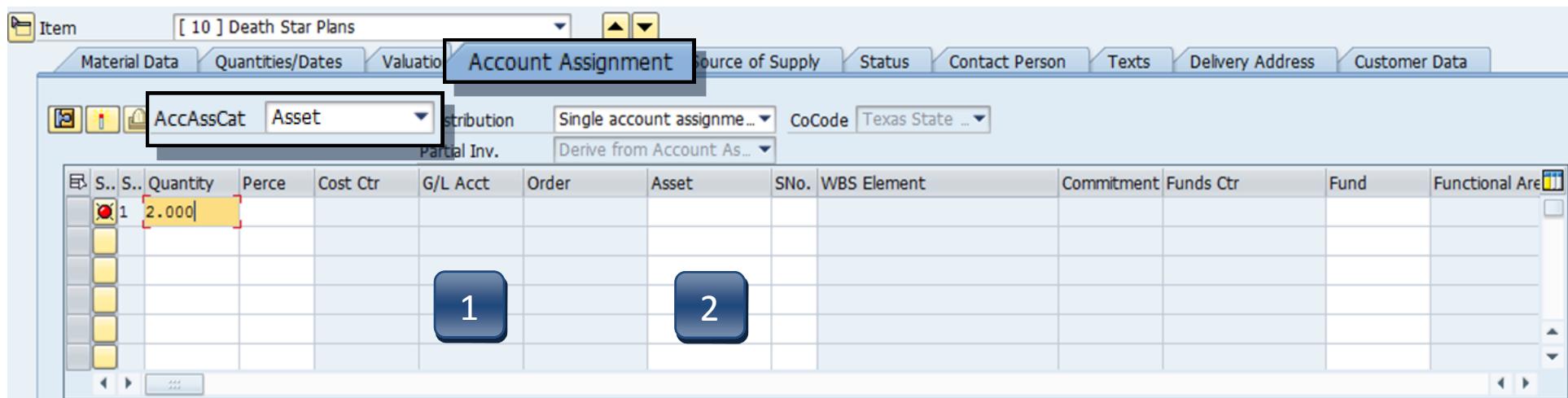
- After pressing ENTER to complete the line item additions in the previous section, you will be taken into the Item Tabs area where funding information is entered.
- The error message '*No commitment item entered in item...*' means that your account information is required in the Account Assignment tab.

The screenshot shows the SAP Fiori interface for creating a local requisition. The 'Account Assignment' tab is selected. The 'Fund' field is highlighted with a yellow background and a red border, indicating it is required. A tooltip at the bottom left says 'No commitment item entered in item 00010 754 7*'. The SAP logo is in the bottom right.

Create a Local Requisition - Item Tab Detail

Navigation between line items in the Tabs section can be executed by clicking the up or down arrows or selecting the item field drop-down menu.

Create a Local Requisition - Item Tab Detail



The screenshot shows the SAP Fiori interface for creating a local requisition. The 'Item' tab is selected. The 'Account Assignment' tab is highlighted. In the table, the 'Asset' field (row 1, column 7) contains the value '2.000'. A red box highlights the 'Asset' dropdown menu above the table, which shows 'AccAssCat' and 'Asset'. Two blue numbered boxes, 1 and 2, are overlaid on the table area. Box 1 is positioned over the first row of the table, and Box 2 is positioned over the second row.

Account Assignment Tab – Asset (A)

STEP 1: Enter **GL** number.

***Correct GL must be used to generate Asset Review workflow.*

STEP 2: Contact **Materials Management** at **245-2294** to obtain a 6-digit Asset number. Enter number into **Asset** field.

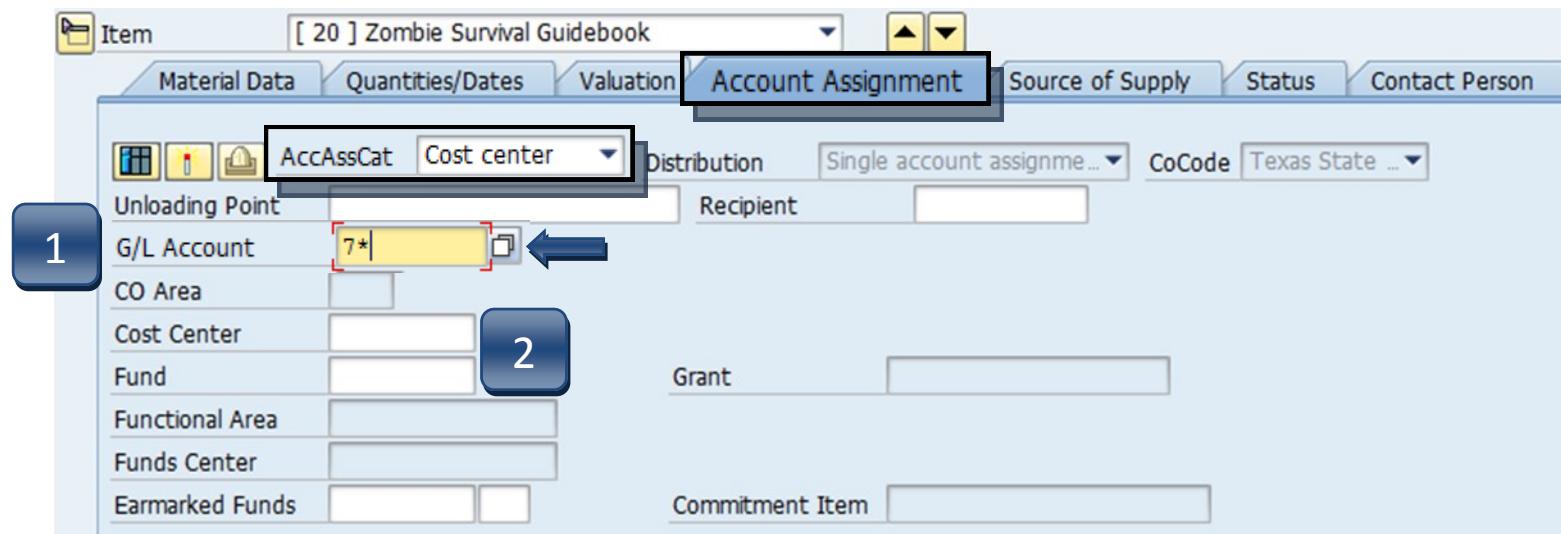
***Fund, Cost Center, and/or Internal Order will auto-populate when Asset number is entered.*

Asset GL Codes

**Valued at \$500 - \$4,999.99*

737800	Computers
737800	iPads/Tablets, Smartphones
737400	TVs
737400	Cameras, Camcorders

Create a Local Requisition - Item Tab Detail



Account Assignment Tab – Cost Center (K)

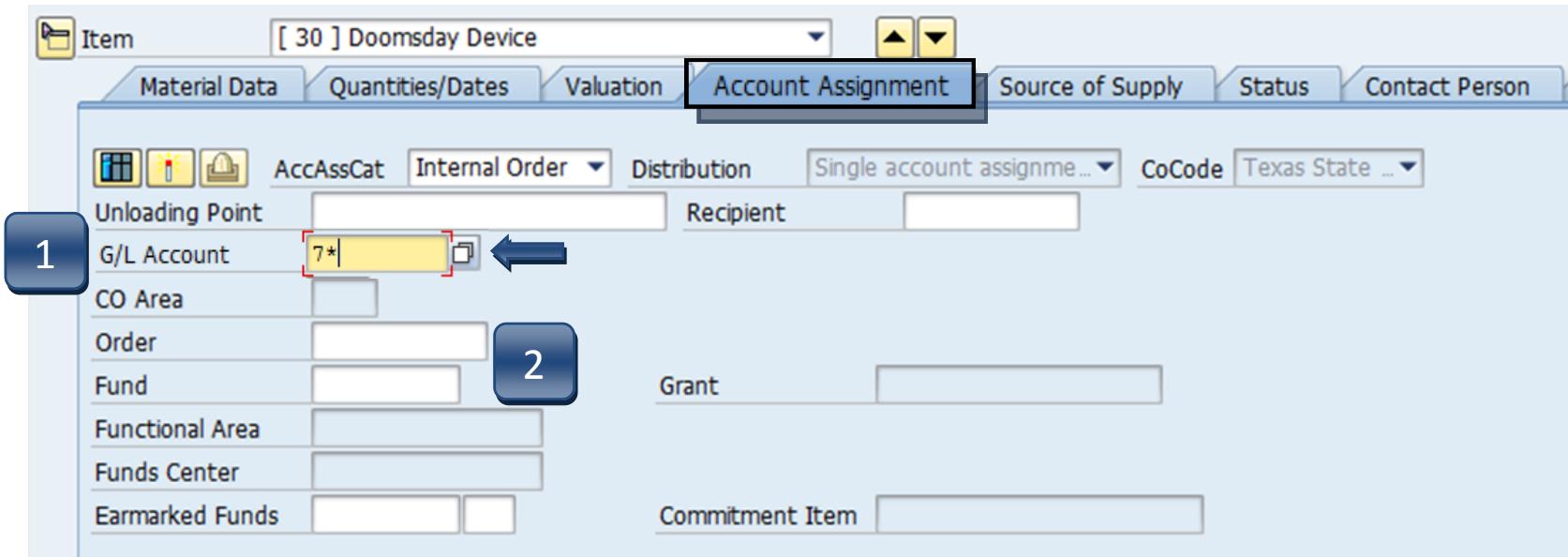
STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database Search can be used if GL is unknown.*

STEP 2: Enter **Cost Center** and **Fund**.

***Earmarked Funds will be left blank.*

Create a Local Requisition - Item Tab Detail



1

2

Unloading Point	Recipient
G/L Account	7*
CO Area	
Order	
Fund	
Functional Area	
Funds Center	
Earmarked Funds	

Grant

Commitment Item

Account Assignment Tab – Internal Order (F)

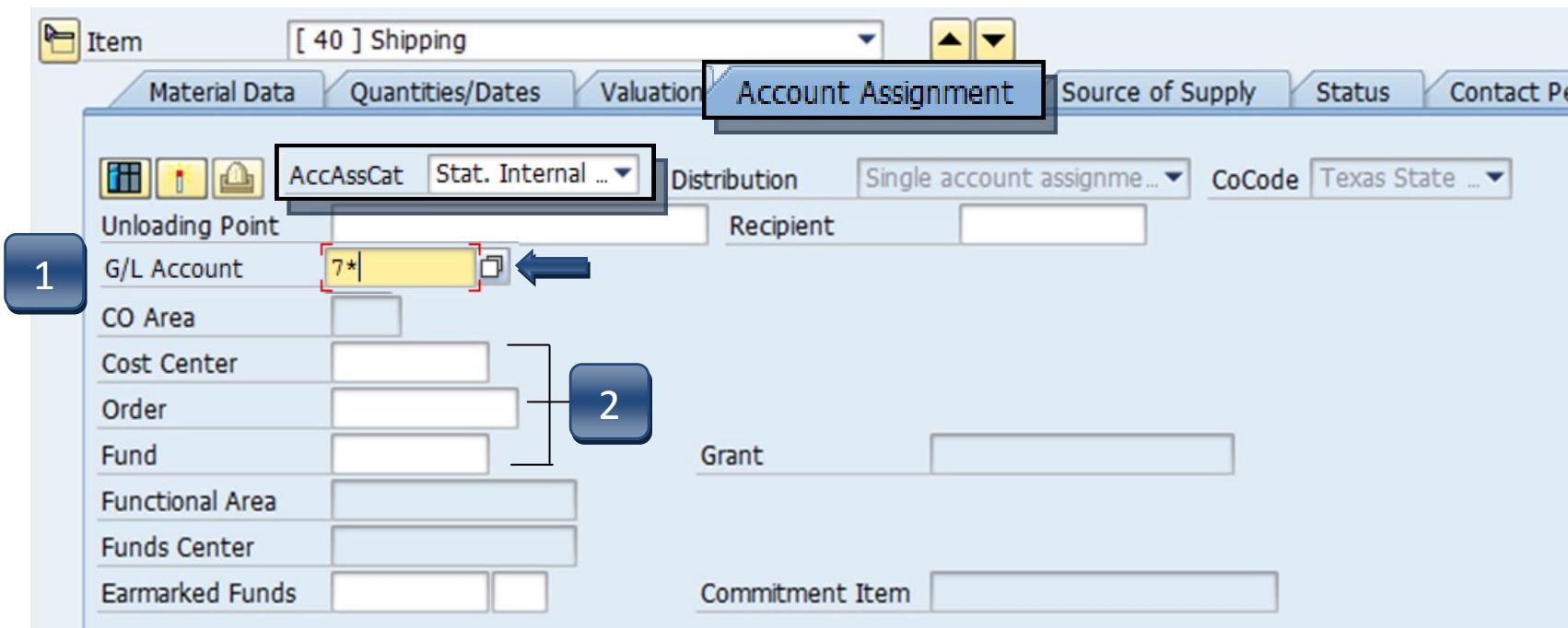
STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database Search can be used if GL is unknown.*

STEP 2: Enter **Order** and **Fund**.

***Earmarked Funds will be left blank.*

Create a Local Requisition - Item Tab Detail



Account Assignment Tab – Statistical Internal Order (S)

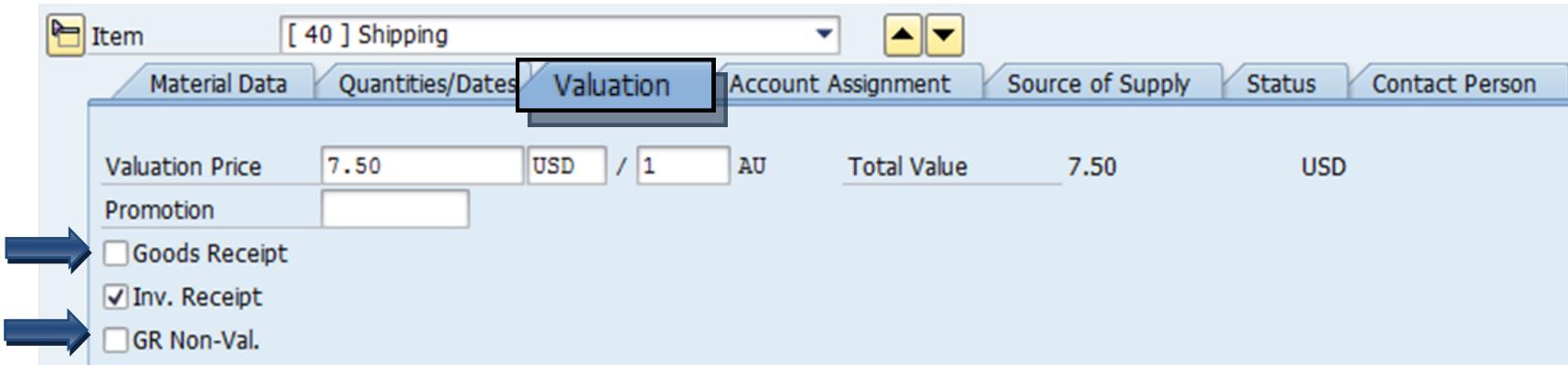
STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database Search can be used if GL is unknown.*

STEP 2: Enter **Cost Center, Order, and Fund.**

***Earmarked Funds will be left blank.*

Create a Local Requisition - Item Tab Detail



Item [40] Shipping

Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person

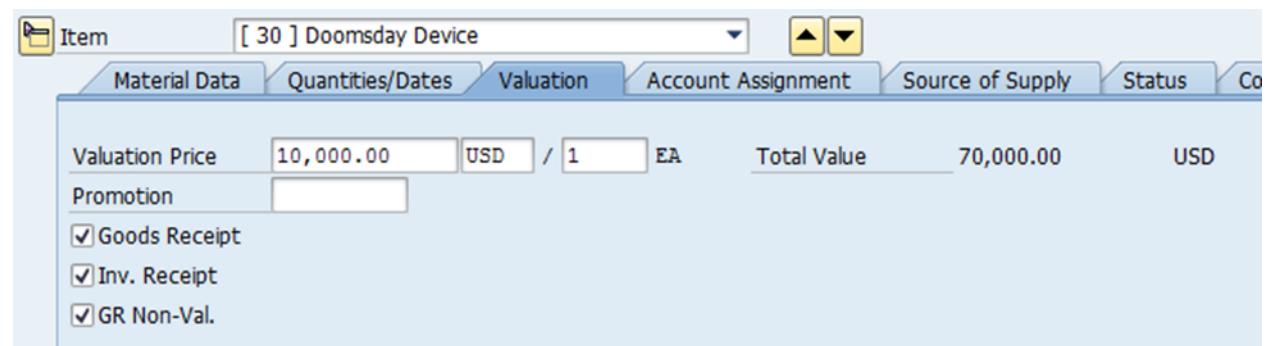
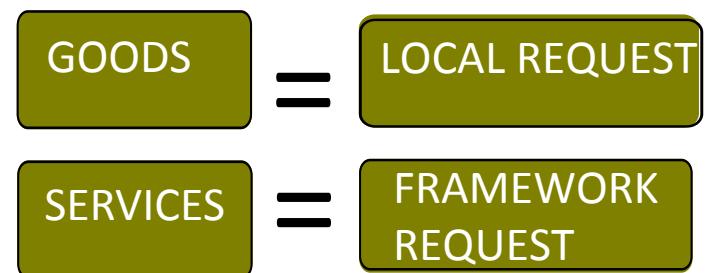
Valuation Price 7.50 USD / 1 AU Total Value 7.50 USD

Promotion

Goods Receipt
 Inv. Receipt
 GR Non-Val.

Valuation Tab

STEP 1: Navigate to any *Service* lines (S1 – shipping, fees, etc.) if applicable, and **uncheck both** **Goods Receipt** and **GR Non-Val** **boxes**. These boxes should be **checked** only if the line is for Goods (G1).



Item [30] Doomsday Device

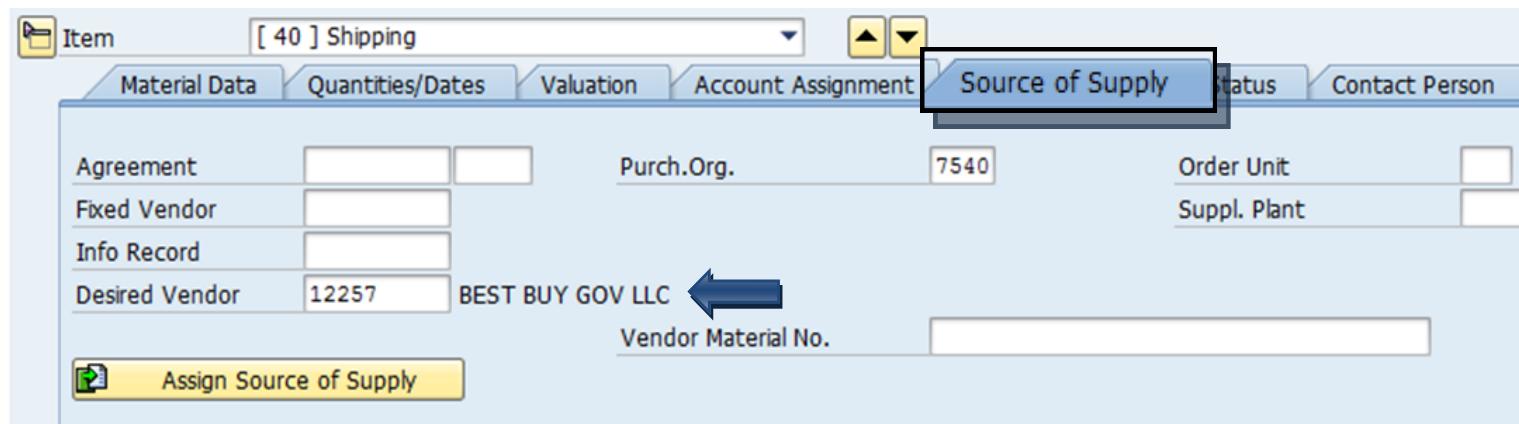
Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Co

Valuation Price 10,000.00 USD / 1 EA Total Value 70,000.00 USD

Promotion

Goods Receipt
 Inv. Receipt
 GR Non-Val.

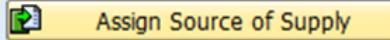
Create a Local Requisition - Item Tab Detail



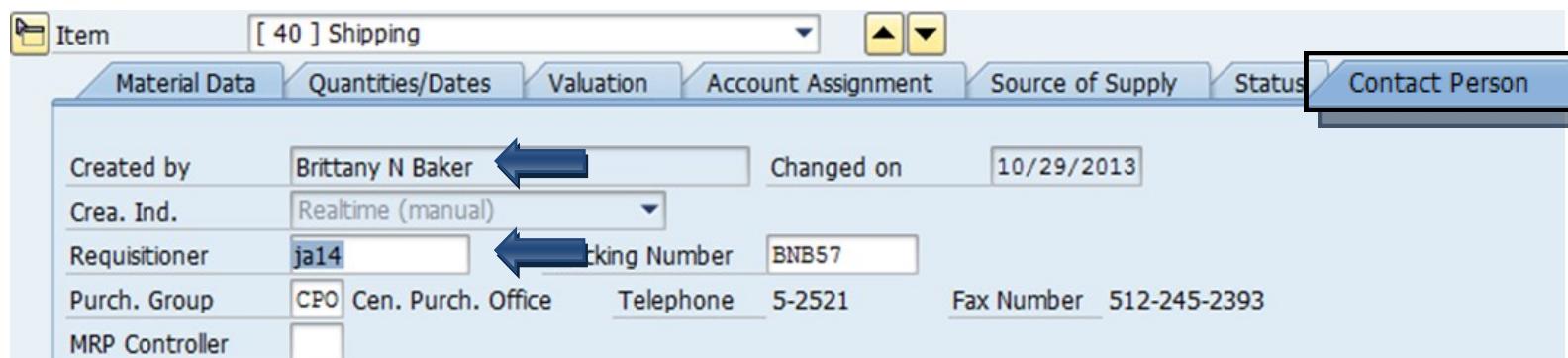
Item [40] Shipping

Material Data Quantities/Dates Valuation Account Assignment **Source of Supply** Status Contact Person

Agreement Purch.Org. 7540 Order Unit
Fixed Vendor Suppl. Plant
Info Record
Desired Vendor 12257 BEST BUY GOV LLC
Vendor Material No.

 Assign Source of Supply

Source of Supply Tab: Verify vendor listed is correct.



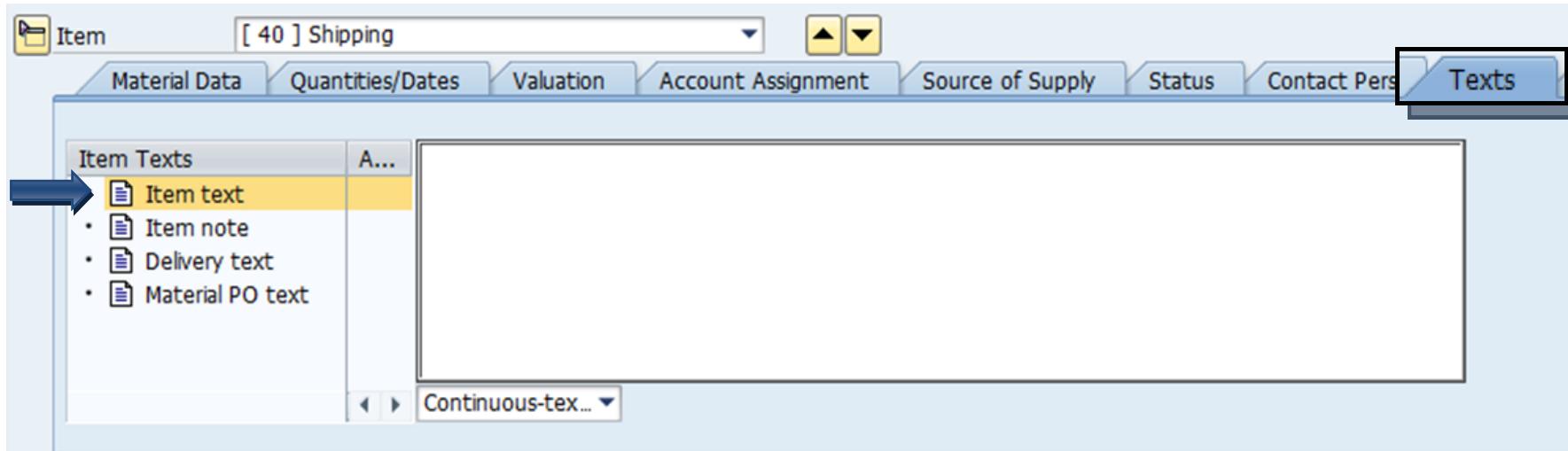
Item [40] Shipping

Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status **Contact Person**

Created by Brittany N Baker Changed on 10/29/2013
Crea. Ind. Realtime (manual)
Requisitioner ja14 Working Number BNB57
Purch. Group CPO Cen. Purch. Office Telephone 5-2521 Fax Number 512-245-2393
MRP Controller

Contact Person Tab: The person creating the requisition will be listed in the **Created by** field. Requisitioner will be listed in the **Requisitioner** field. Other contact information will be listed. Purchasing will contact this person if there are any questions/issues with the requisition.

Create a Local Requisition - Item Tab Detail



Texts Tab: Insert any notes that you would like ***printed*** on the purchase order:

- Part Numbers

If the item you are purchasing has a part or catalog number, please include here or in the Header Note.

- Special instructions to the Vendor

Create a Local Requisition - Check, Save, and Submit

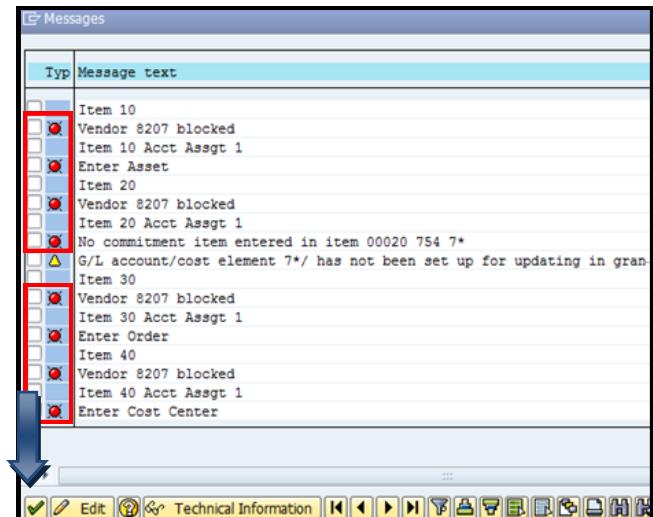
STEP 1: Click the **Check** icon to ensure there are no errors.



SAP will check your requisition and generate a window that displays found errors.

-If any errors are found, click the green check to close the message window. Double-check your requisition to verify you have not omitted any information.

-If you have checked everything and still receive **red hard stop** errors, please contact Purchasing at 245-2521.



STEP 2: If there are no errors, click **Save**.

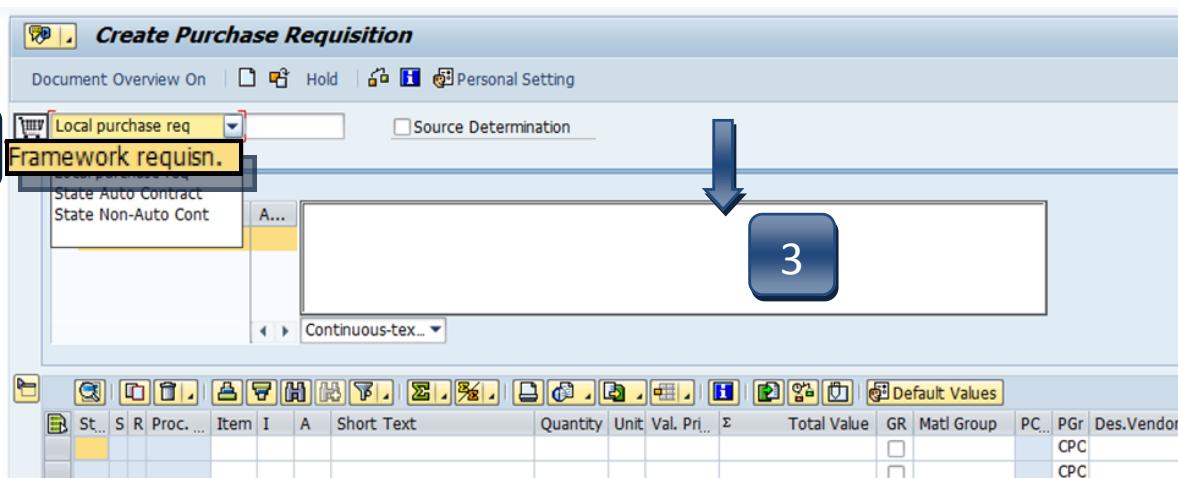
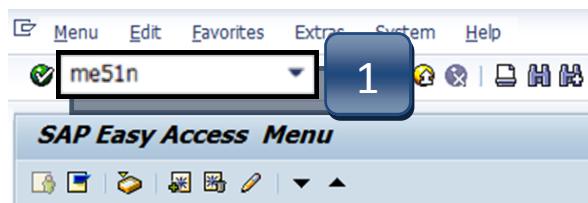


STEP 3: After you have saved, the requisition number will be displayed in the bottom left corner of the screen. Your requisition number will begin with **10** and follow with six additional numbers, example: 10057615.

Create a Framework Requisition

Used for the creation of Service request

STEP 1: Enter transaction code **ME51N** in main menu search field.
Hit **Enter** on your keyboard.

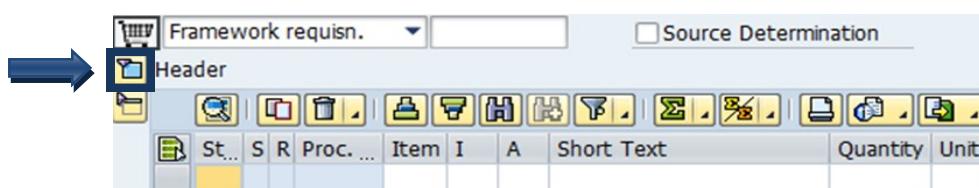


STEP 2: Select **Framework requisn.** as document type from the drop-down menu.

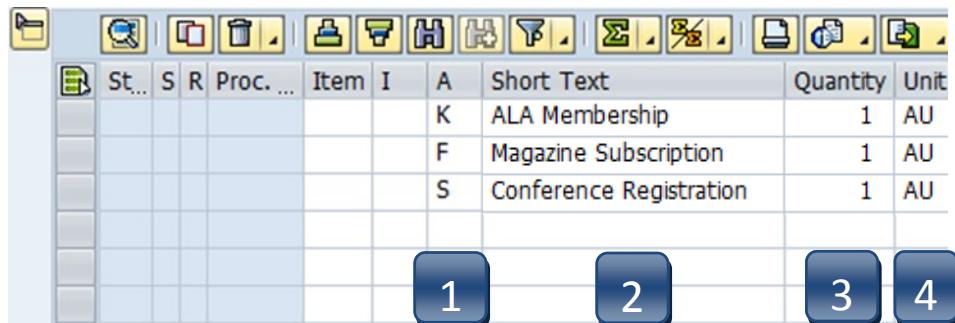
STEP 3: In **Header note** section add:

- Notes giving a clear explanation of the purchase. What are you purchasing?
- **DATES** of service. **Dates are required** to ensure PO creation.
- **CONTRACTS/CONSORTIUMS** you are purchasing off of. (TXMAS, E&I, etc.)
- Specific instructions, e.g. needing a check cut or vendor requests a deposit.
- Name of event, date, time, location, # of attendees

If header section is not visible, click **Expand Header button to display.



Create a Framework Requisition - Line Items



St...	S	R	Proc. ...	Item	I	A	Short Text	Quantity	Unit
				K		ALA Membership	1	AU	
				F		Magazine Subscription	1	AU	
				S		Conference Registration	1	AU	

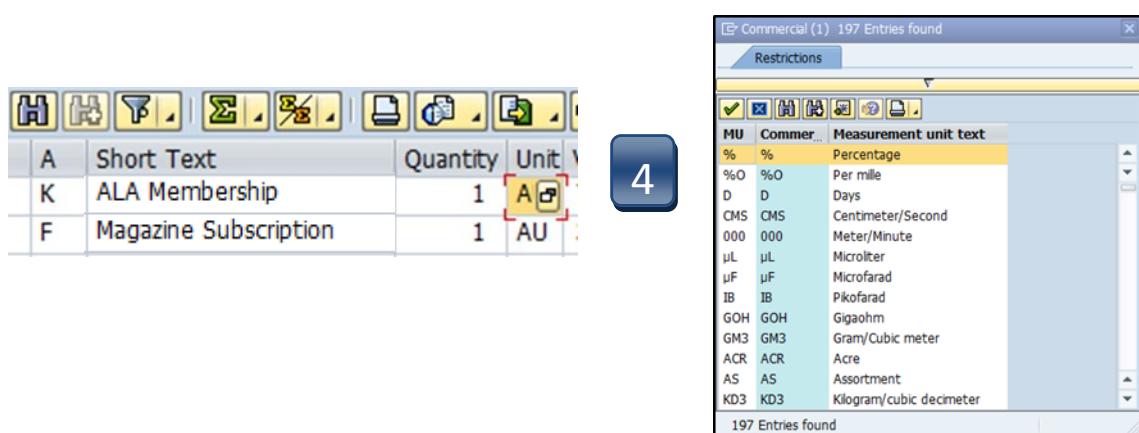
1 2 3 4

STEP 1: **A (Account Assignment Category) column:** Enter **K (Cost Center), F (Internal Order), or S (Statistical Order)** for each line item.
(Use down arrow on keyboard to move between lines.)

STEP 2: **Short Text column:** Enter item short text. (What you are purchasing.)

STEP 3: **Quantity column:** Enter quantity.

STEP 4: **Unit of Measure column:** Enter unit of measure code. If unknown, use the database search for available options (click the button in the lower right corner of the field).
AU will be used most often. **Never use UNT.



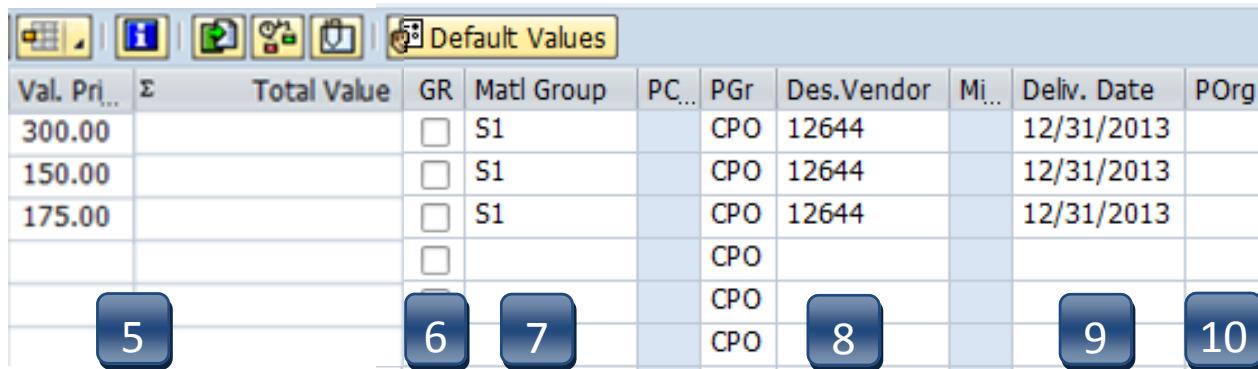
A	Short Text	Quantity	Unit
K	ALA Membership	1	AU
F	Magazine Subscription	1	AU

4

Restrictions		
MU	Commer...	Measurement unit text
%	%O	Percentage
D	D	Per mille
CMS	CMS	Days
000	000	Centimeter/Second
µL	µL	Meter/Minute
µF	µF	Microfarad
IB	IB	Pikofarad
GOH	GOH	Gigaohm
GM3	GM3	Gram/Cubic meter
ACR	ACR	Acre
AS	AS	Assortment
KD3	KD3	Kilogram/cubic decimeter

197 Entries found

Create a Framework Requisition - Line Items



The screenshot shows a table with 10 columns. The columns are labeled: Val. Pri..., Σ, Total Value, GR, Matl Group, PC..., PGr, Des.Vendor, Mi..., Deliv. Date, and POrg. There are three rows of data. Row 1: Val. Pri... is 300.00, Σ is 300.00, Total Value is 300.00, GR is unchecked, Matl Group is S1, PC... is CPO, PGr is 12644, Des.Vendor is 12644, Mi... is blank, Deliv. Date is 12/31/2013, POrg is blank. Row 2: Val. Pri... is 150.00, Σ is 150.00, Total Value is 150.00, GR is unchecked, Matl Group is S1, PC... is CPO, PGr is 12644, Des.Vendor is 12644, Mi... is blank, Deliv. Date is 12/31/2013, POrg is blank. Row 3: Val. Pri... is 175.00, Σ is 175.00, Total Value is 175.00, GR is unchecked, Matl Group is S1, PC... is CPO, PGr is 12644, Des.Vendor is 12644, Mi... is blank, Deliv. Date is 12/31/2013, POrg is blank. Below the table are ten numbered blue buttons labeled 5 through 10, corresponding to the columns.

Val. Pri...	Σ	Total Value	GR	Matl Group	PC...	PGr	Des.Vendor	Mi...	Deliv. Date	POrg
300.00		300.00	<input type="checkbox"/>	S1	CPO	12644			12/31/2013	
150.00		150.00	<input type="checkbox"/>	S1	CPO	12644			12/31/2013	
175.00		175.00	<input type="checkbox"/>	S1	CPO	12644			12/31/2013	
			<input type="checkbox"/>		CPO					
			<input type="checkbox"/>		CPO					
			<input type="checkbox"/>		CPO					

STEP 5: Valuation Price column: Enter **TOTAL** activity price.

**Total Value will be automatically populated later.

If Total Value is \$5,000 or greater, you will need to attach justification documentation to the requisition. (See Attaching a Document section.)

STEP 6: GR column: All boxes should be *unchecked* since this is a FRAMEWORK requisition and should be used for *Services* only.

STEP 7: Material Group column: Enter **S1** for Non-Professional Services or **S2** for Professional Services. (Refer to [UPPS 03.04.01](#) for definition of Professional Services.) **G1 should not be used for Frameworks.

STEP 8: Desired Vendor column: If known, enter the vendor number. If unknown, use the database to search by clicking the box in the bottom right corner. (Refer to **Search for Existing Vendor** section for instructions)



**Vendor number should be the same on ALL lines. A requisition should not have more than one vendor number.

STEP 9: Delivery Date column: Enter date services will be completed. (**mm/dd/yyyy**)

STEP 10: POrg column: Leave blank.

**7540 should populate once all STEPS are complete.

Create a Framework Requisition - Line Items

Default Values								
Stor. Loc.	Plant	D...	Auto Req	TBPC ...	TBPC ...	Tracking...	Requisnr.	
JCKP	Texas State U	FO				bnb57	ja14	
JCKP	Texas State U	FO				bnb57	ja14	
JCKP	Texas State U	FO				bnb57	ja14	
	Texas State U	FO						
	Texas State U	FO						
11	Texas State U	FO				12	13	
	Texas State U	FO						

STEP 11: Storage Location column: Use the database search to select the storage location if you do not know the code for the location.

STEP 12: Tracking Number column: Enter your NetID.

STEP 13: Requisitioner column: Enter the NetID of the person for whom you are creating the requisition.

****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-13 as many times as necessary.**

STEP 14: Hit **ENTER** on your keyboard to generate the **Item Tabs** section.

Create a Framework Requisition - Item Tab Detail

Tip

- After pressing ENTER to complete the line item additions in the previous section, you will be taken into the Item Tabs area where funding information is entered.
- The error message '*No commitment item entered in item...*' means that your account information is required in the Account Assignment tab.

The screenshot shows the SAP Fiori interface for creating a framework requisition. The top navigation bar displays 'Item' and the item number '[10] Event Catering'. Below the navigation bar is a tab bar with several tabs: 'Material Data', 'Quantities/Dates', 'Valuation', 'Account Assignment' (which is highlighted in blue), 'Source of Supply', 'Status', and 'Contact Person'. The 'Account Assignment' tab is currently active, showing fields for 'Unloading Point', 'G/L Account' (containing '72*'), 'CO Area', 'Cost Center', 'Fund', 'Functional Area', 'Funds Center', 'Earmarked Funds', 'Recipient', 'Grant', and 'Commitment Item'. A bracket on the right side of the screen groups the 'G/L Account', 'CO Area', 'Cost Center', 'Fund', 'Functional Area', 'Funds Center', and 'Earmarked Funds' fields. At the bottom of the screen, a red exclamation mark icon is followed by the error message: 'No commitment item entered in item 00010 754 72*'. The entire screenshot is framed by a thick black border.

Create a Framework Requisition - Item Tab Detail

Navigation between line items in the Tabs section can be executed by clicking the up or down arrows or selecting the item field drop-down menu.

St...	S	R	Proc...	Item	I	A	Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value
						K	ALA Membership	1	AU	300.00		
						F	Magazine Subscription	1	AU	150.00		
						S	Conference Registration	1	AU	175.00		

0.00

Serial D

[10] ALA Membership

[10] ALA Membership

[20] Magazine Subscription

[30] Conference Registration

Assignment

Source of Supply

Status

Contact Person

Single account assignment

CoCode

Texas State

Delivery Point

Recipient

Count

72*

ea

Center

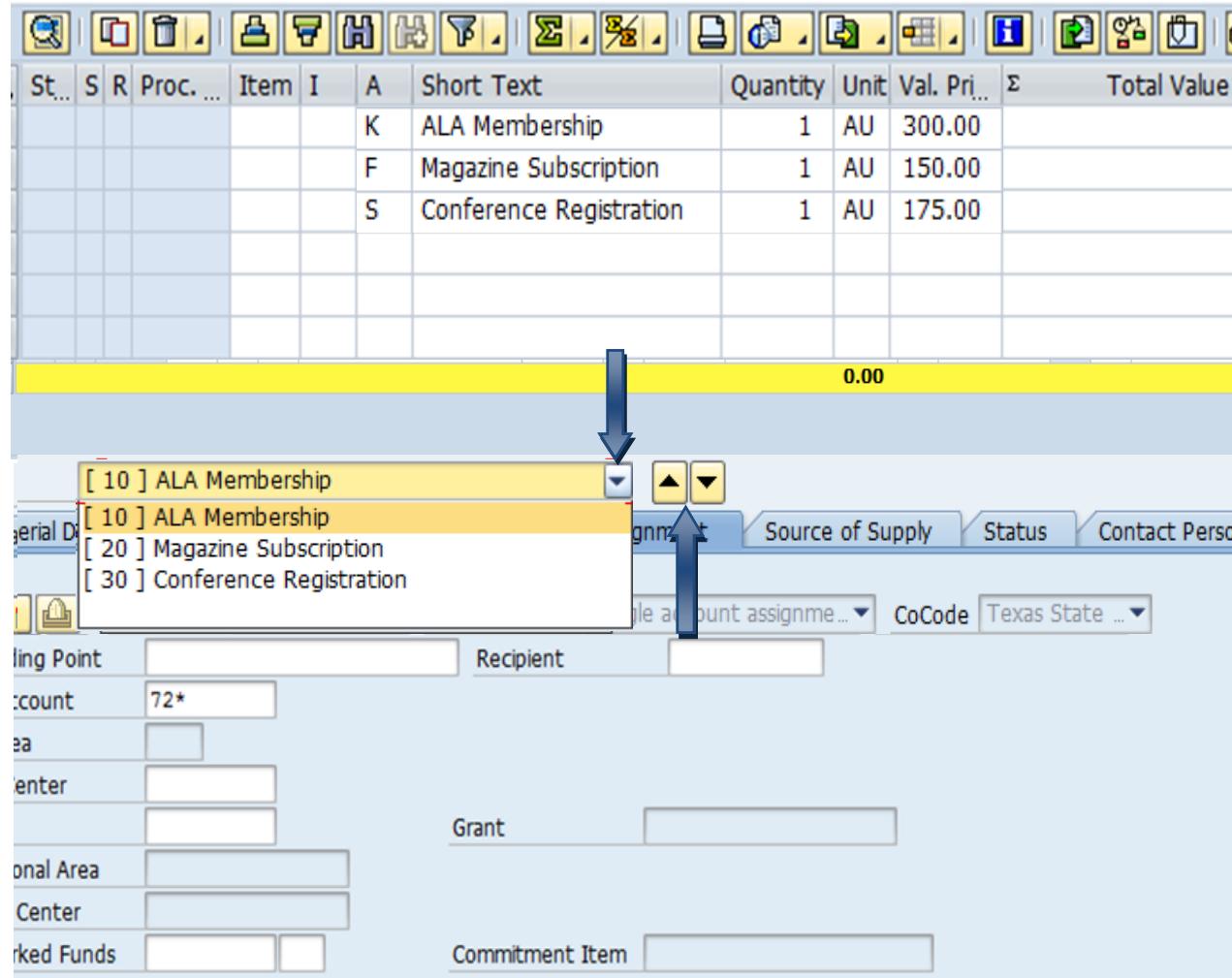
ional Area

Center

arked Funds

Grant

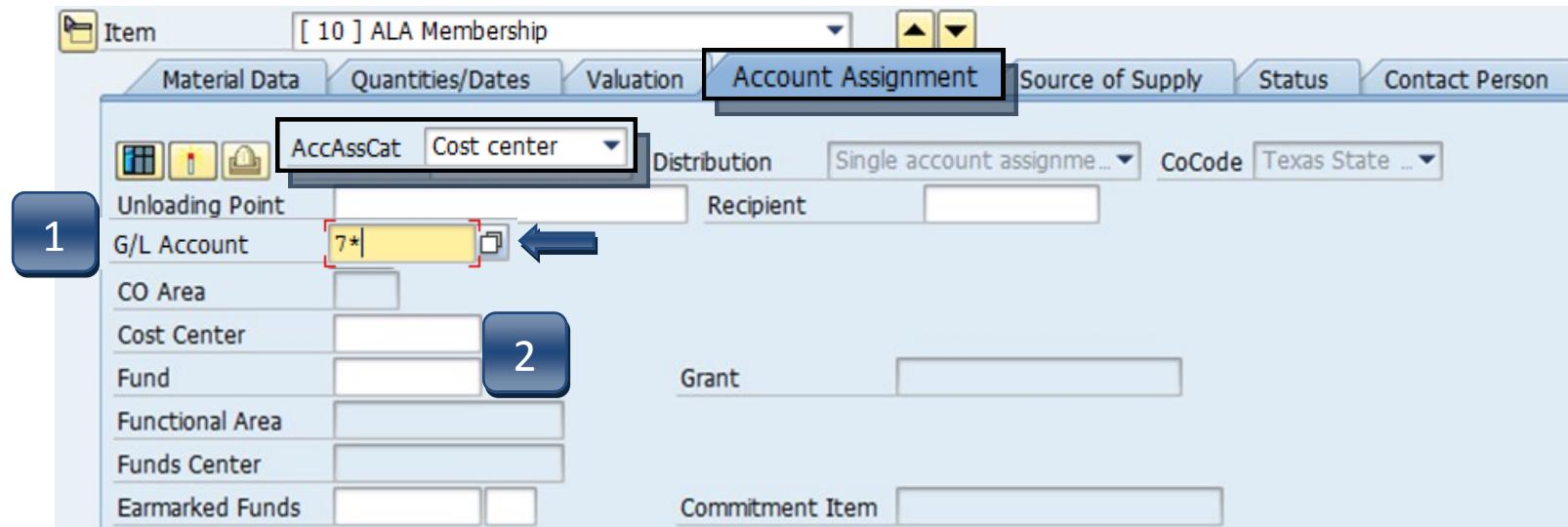
Commitment Item



rev 5/14

4.06

Create a Framework Requisition - Item Tab Detail



The screenshot shows the SAP Fiori Item detail screen with the 'Account Assignment' tab selected. The 'G/L Account' field is highlighted with a yellow background and a red border, and a blue arrow points to the 'Cost Center' field below it. The 'Cost Center' field is also highlighted with a yellow background and a red border. Other fields visible include 'Unloading Point', 'CO Area', 'Fund', 'Functional Area', 'Funds Center', 'Earmarked Funds', 'Grant', and 'Commitment Item'. The top navigation bar shows tabs for 'Item', 'Material Data', 'Quantities/Dates', 'Valuation', 'Account Assignment' (highlighted in blue), 'Source of Supply', 'Status', and 'Contact Person'. A status bar at the bottom shows 'rev 5/14' and '4.07'.

Account Assignment Tab – Cost Center (K)

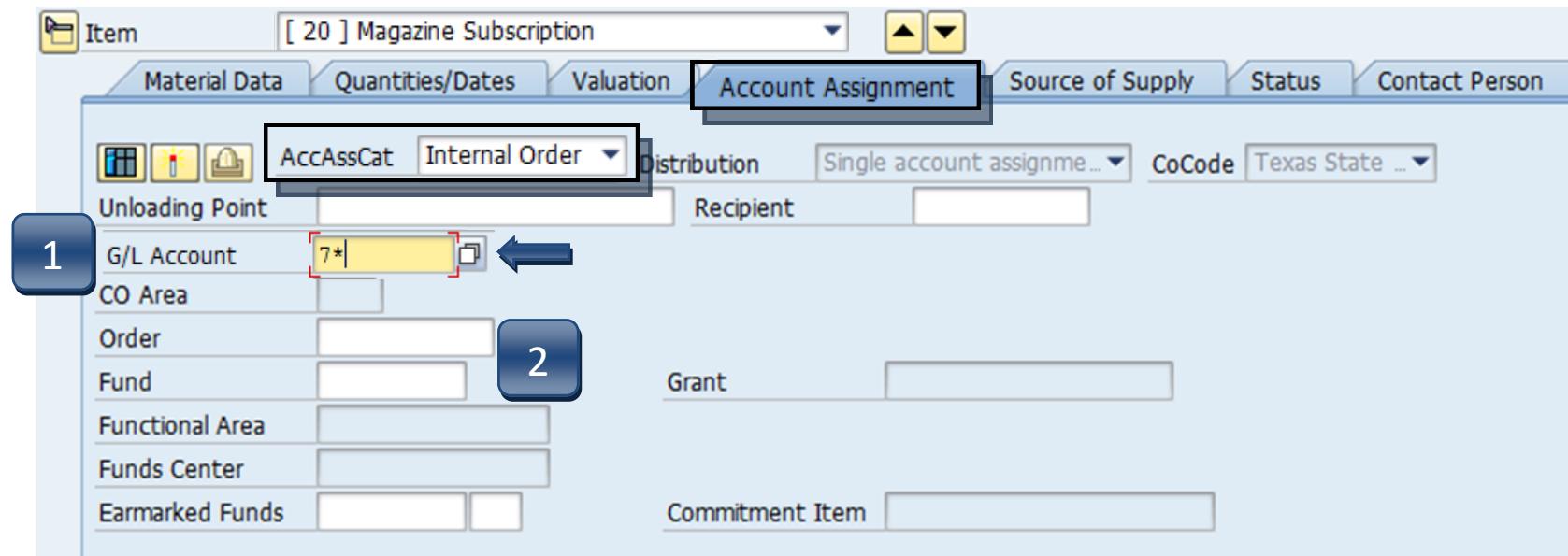
STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database search can be used if GL is unknown.*

STEP 2: Enter **Cost Center** and **Fund**.

***Earmarked Funds will be left blank.*

Create a Framework Requisition - Item Tab Detail



Account Assignment Tab – Internal Order (F)

STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database Search can be used if GL is unknown.*

STEP 2: Enter **Order** and **Fund**.

***Earmarked Funds will be left blank.*

Create a Framework Requisition - Item Tab Detail

1

Unloading Point	Recipient
G/L Account	7*
CO Area	
Cost Center	
Order	
Fund	
Functional Area	
Funds Center	
Earmarked Funds	

2

Grant

Commitment Item

Account Assignment Tab – Statistical Internal Order (S)

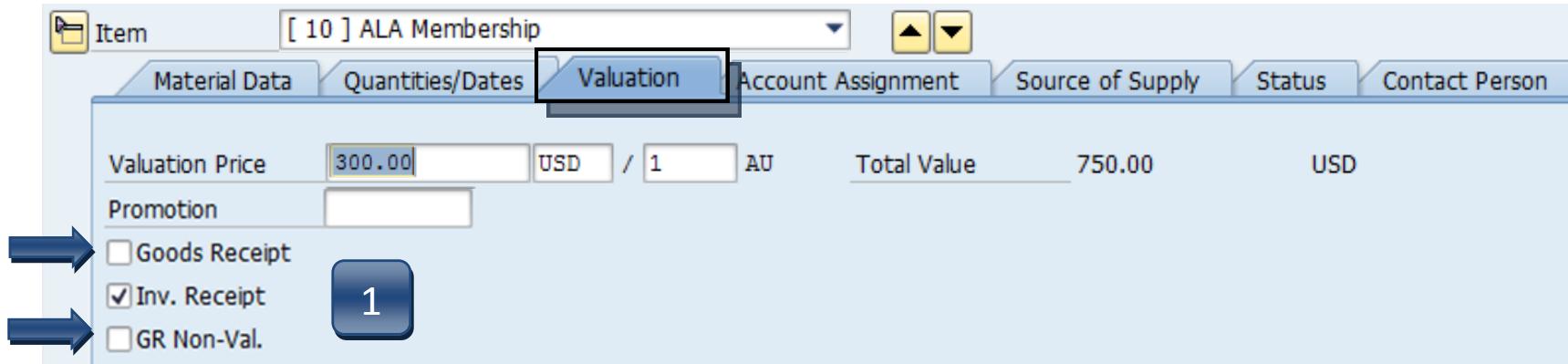
STEP 1: Enter **GL** number.

***GL/Asset Reference Guide or Database Search can be used if GL is unknown.*

STEP 2: Enter Cost Center, Order, and Fund.

*****Earmarked Funds will be left blank.***

Create a Framework Requisition - Item Tab Detail



Item [10] ALA Membership

Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status Contact Person

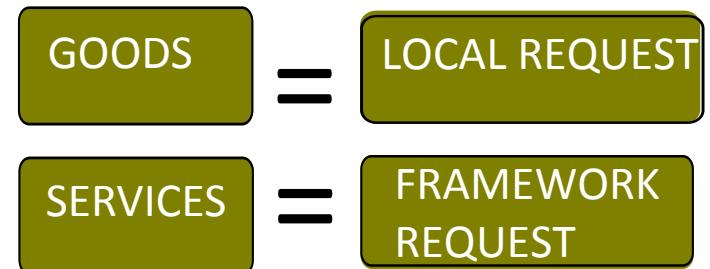
Valuation Price: 300.00 USD / 1 AU Total Value: 750.00 USD

Promotion:

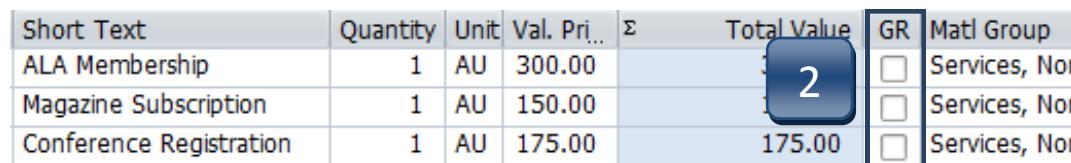
Goods Receipt
 Inv. Receipt
 GR Non-Val.

Valuation Tab

STEP 1: **Uncheck both Goods Receipt and GR Non-Val boxes** for all *Service* lines. These boxes should be checked *only* if the line is for Goods (G1).

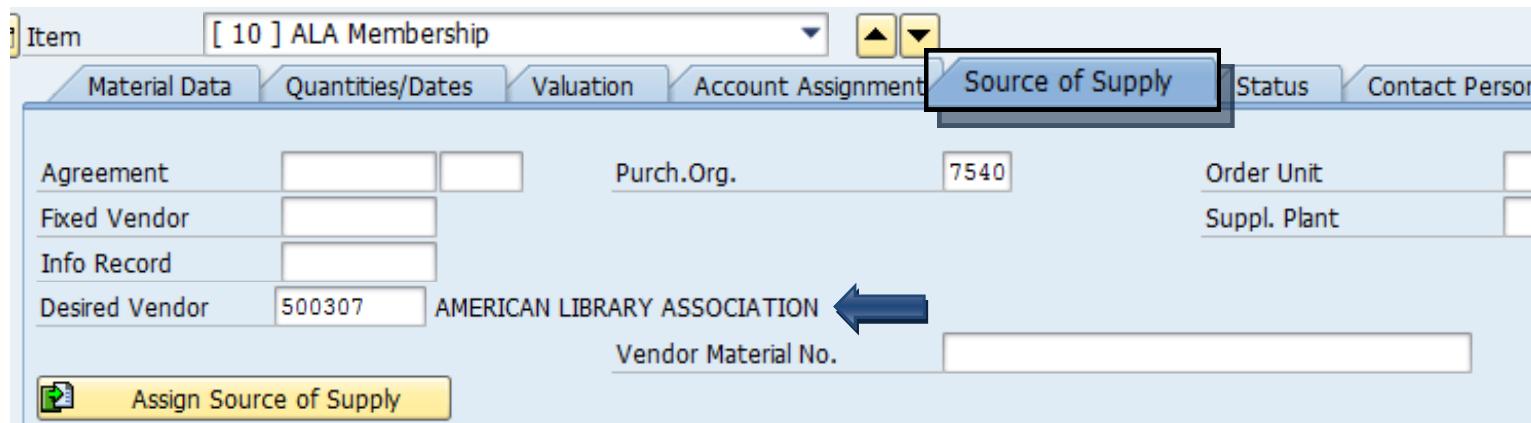


STEP 2: **In the Line Items section, uncheck the GR column box for each *Service* line.** For some reason the system inserts a checkmark in this box after you have completed adding line items and pressed ENTER to get down into the tab detail section.



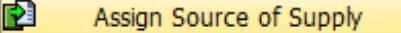
Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value	GR	Matl Group
ALA Membership	1	AU	300.00		300.00	<input checked="" type="checkbox"/>	Services, Nor
Magazine Subscription	1	AU	150.00		150.00	<input checked="" type="checkbox"/>	Services, Nor
Conference Registration	1	AU	175.00		175.00	<input checked="" type="checkbox"/>	Services, Nor

Create a Framework Requisition - Item Tab Detail

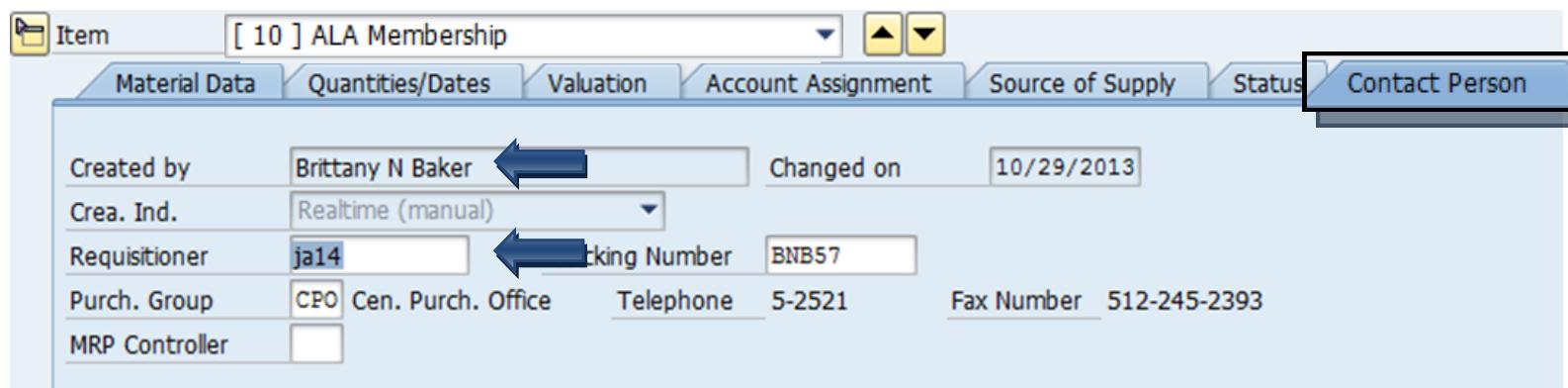


Item [10] ALA Membership

Material Data Quantities/Dates Valuation Account Assignment **Source of Supply** Status Contact Person

Agreement Purch.Org. 7540 Order Unit
Fixed Vendor Suppl. Plant
Info Record
Desired Vendor 500307 AMERICAN LIBRARY ASSOCIATION Vendor Material No.


Source of Supply Tab: Verify vendor listed is correct.



Item [10] ALA Membership

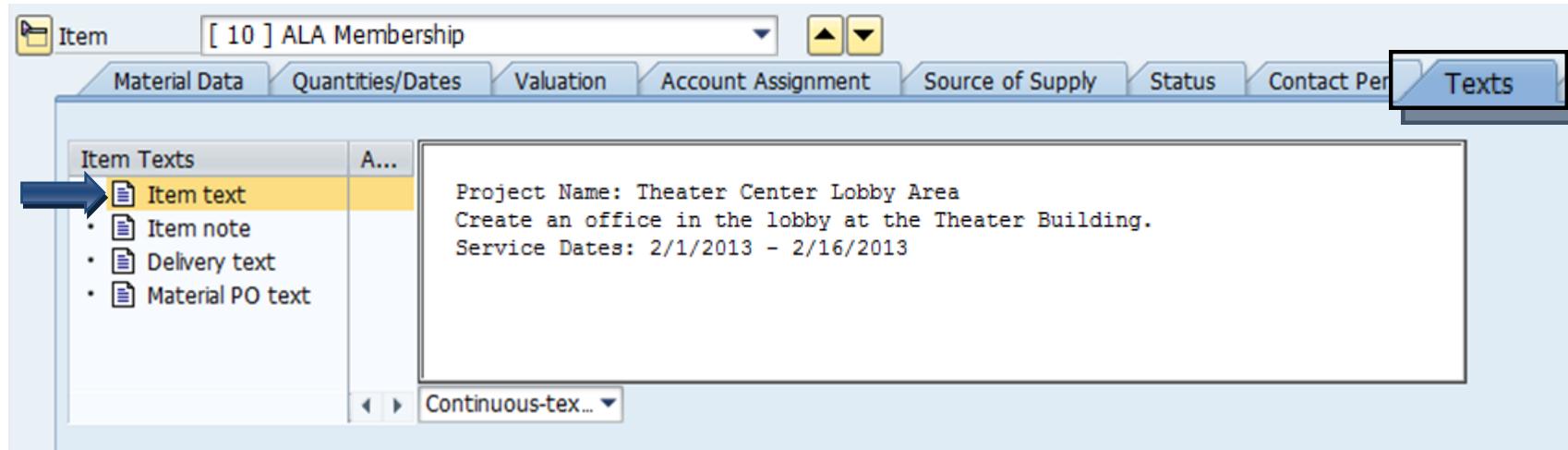
Material Data Quantities/Dates Valuation Account Assignment Source of Supply Status **Contact Person**

Created by Brittany N Baker Changed on 10/29/2013
Crea. Ind. Realtime (manual)
Requisitioner ja14 Work Number BNB57
Purch. Group CPO Cen. Purch. Office Telephone 5-2521 Fax Number 512-245-2393
MRP Controller

Contact Person Tab:

The person creating the requisition will be listed in the **Created by** field. Requisitioner will be listed in the **Requisitioner** field. Other contact information will be listed. Purchasing will contact this person if there are any questions/issues with the requisition.

Create a Framework Requisition - Item Tab Detail



Texts Tab: Insert any notes that you would like **printed** on the purchase order:

Contract requisitions

- **DATES** of **ENTIRE CONTRACT** or **SERVICE**.
- Brief **STATEMENT** of **WORK**.
- If there will be a **PAYMENT SCHEDULE** for multiple payments, please convert this requisition to a **LIMIT** Framework.
See Create a Limit Framework Requisition for instructions.

Create a Framework Requisition - Check, Save, and Submit

STEP 1: Click the **Check** icon to ensure there are no errors.



SAP will check your requisition and generate a window that displays found errors.

-If any errors are found, click the green check to close the message window. Double-check your requisition to verify you have not omitted any information.

-If you have checked everything and still receive **red hard stop** errors, please contact Purchasing at 245-2521.

Type	Message Text
Info	Item 10
Error	Vendor 8207 blocked
Info	Item 10 Acct Assgt 1
Info	Enter Asset
Info	Item 20
Error	Vendor 8207 blocked
Info	Item 20 Acct Assgt 1
Error	No commitment item entered in item 00020 754 7*
Info	G/L account/cost element 7*/ has not been set up for updating in gran-
Info	Item 30
Error	Vendor 8207 blocked
Info	Item 30 Acct Assgt 1
Info	Enter Order
Info	Item 40
Error	Vendor 8207 blocked
Info	Item 40 Acct Assgt 1
Info	Enter Cost Center

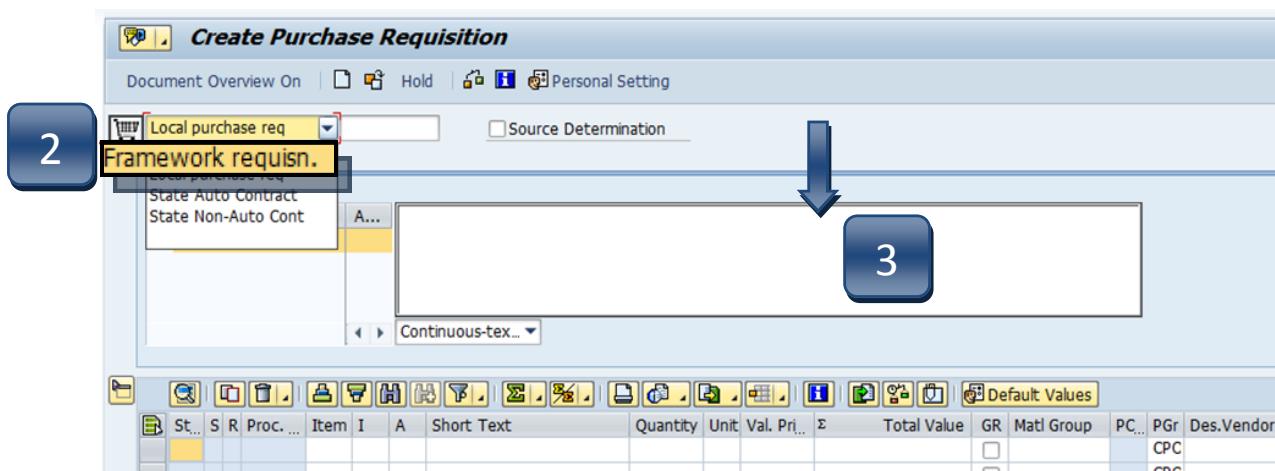
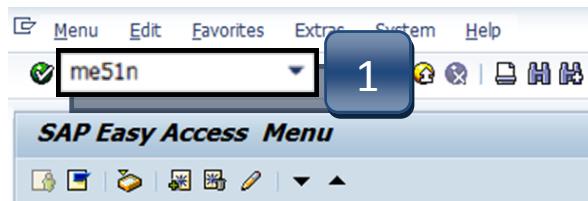
STEP 2: If there are no errors, click **Save**.



STEP 3: After you have saved, the requisition number will be displayed in the bottom left corner of the screen. Your requisition number will begin with **14** and follow with six additional numbers, example: 14057615

Create a Limit Framework Requisition

STEP 1: Enter transaction code **ME51N** in main menu search field.
Hit **Enter** on your keyboard.

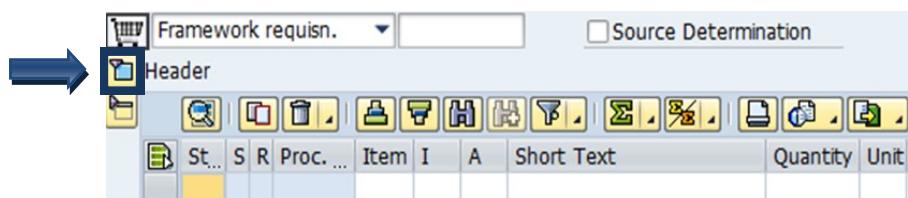


STEP 2: Select **Framework requisn.** as document type from the drop-down menu.

STEP 3: In **Header note** section add:

- Notes giving a clear explanation of the purchase. What are you purchasing?
- **DATES** of service or stay (lodging). **Dates are required** to ensure PO creation.
- **CONTRACTS/CONSORTIUMS** you are purchasing off of. (TXMAS, E&I, etc.)
- Specific instructions, e.g. needing a check cut or vendor requests a deposit.
- Name of lodger(s), confirmation/registration #
- Name of event, date, time, location, # of attendees

If header section is not visible, click **Expand Header button to display.



Create a Limit Framework Requisition - Line Items



It is *imperative* that the following 14 steps are completed exactly in the order that they are listed. If information is entered out of sequence, the system *will not* generate the **LIMITS** tab correctly!

The screenshot shows a SAP Fiori application interface with a toolbar at the top containing various icons. Below the toolbar is a table with the following data:

St...	S	R	Proc...	Item	I	A	Short Text	Quantity	Unit
					B	K	Event Catering	1	AU
					B	F	Lodging	1	AU
					B	F	Lodging Tax	1	AU
					B	S	Building Repairs	1	AU

Overlaid on the table are five blue numbered boxes: 1 is in the I column of the second row; 2 is in the A column of the second row; 3 is in the A column of the third row; 4 is in the Quantity column of the fourth row; and 5 is in the Unit column of the fifth row.

STEP 1: I (Item Category) column: Enter a **B** for each line (use down arrow on keyboard to move between lines) that will be processed as a **LIMIT**.

****This step is what makes the Framework requisition a *LIMIT* Framework.**

STEP 2: A (Account Assignment Category) column: Enter **K** (**Cost Center**), **F** (**Internal Order**), or **S** (**Statistical Order**) for each line item.

(Use down arrow on keyboard to move between lines.)

****A column cannot be changed once STEP 15 is completed.**

STEP 3: Short Text column: Enter item short text. (What you are purchasing.)

STEP 4: Quantity column: Enter quantity. (1 if using AU as Unit of Measure.)

STEP 5: Unit of Measure column: Should default to **AU**. If another code is needed, either type it in or use the database search for available options. (Click the button in the lower right corner of the field.)

****Never use UNT.**

The screenshot shows a SAP Fiori application interface with a toolbar at the top containing various icons. Below the toolbar is a table with the following data:

A	Short Text	Quantity	Unit
K	Event Catering	1	AU
F	ALA Membership	1	AU

Overlaid on the table is a blue numbered box 5 in the Unit column of the second row. To the right of the table is a small pop-up window titled "Commercial (1) 197 Entries found" showing a list of measurement unit codes and descriptions. The "AU" code is highlighted in yellow.

Create a Limit Framework Requisition - Line Items

STEP 6: Valuation Price & Total Value columns: Leave blank. They will be entered in the LIMITS tab once all line entry STEPS are complete.

If Total Value is \$5,000 or greater, you will need to attach justification documentation to the requisition. (See Attaching a Document section.)

STEP 7: GR column: All boxes should be *unchecked* since this is a FRAMEWORK requisition and should be used for *Services* only.

STEP 8: Material Group column: Enter **S1** for Non-Professional Services or **S2** for Professional Services. (Refer to [UPPS 03.04.01](#) for definition of Professional Services) ****G1 should not be used for Frameworks.**

STEP 9: Desired Vendor column: If known, enter the vendor number. If unknown, use the database to search by clicking the box in the bottom right corner. (Refer to **Search for Existing Vendor** section for instructions)

****Vendor number should be the same on ALL lines. A requisition should not have more than one vendor number.**

STEP 10: Delivery Date column: Enter date services will be completed. (mm/dd/yyyy)

STEP 11: POrg column: Leave blank.

****7540** should populate once all STEPS are complete.

Create a Limit Framework Requisition - Line Items

Default Values							
Stor. Loc.	Plant	D...	Auto Req	TBPC ...	TBPC ...	Tracking...	Requisnr.
JCKP	Texas State U	FO				bnb57	ja14
JCKP	Texas State U	FO				bnb57	ja14
JCKP	Texas State U	FO				bnb57	ja14
	Texas State U	FO					
	Texas State U	FO					
	Texas State U	FO					

12

13

14

STEP 12: Storage Location column: Use the database search to select the storage location if you do not know the code for the location.

STEP 13: Tracking Number column: Enter your NetID.

STEP 14: Requisitioner column: Enter the NetID of the person for whom you are creating the requisition.

****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-14 as many times as necessary.**

STEP 15: Hit **ENTER** on your keyboard to generate the **Item Tabs** section.

Create a Limit Framework Requisition - Item Tab Detail

Tip

- After pressing ENTER to complete the line item additions in the previous section, you will be taken into the LIMITS Tab area where funding information is entered.
- The error message '*Maintain services or limits for Item...*' means that your account information is required in the LIMITS tab.
- **ACCOUNT ASSIGNMENT TAB WILL NOT BE USED.**

Item [10] Event Catering

Limits Material Data Quantities/Dates Valuation Account Assignment Source of Supply

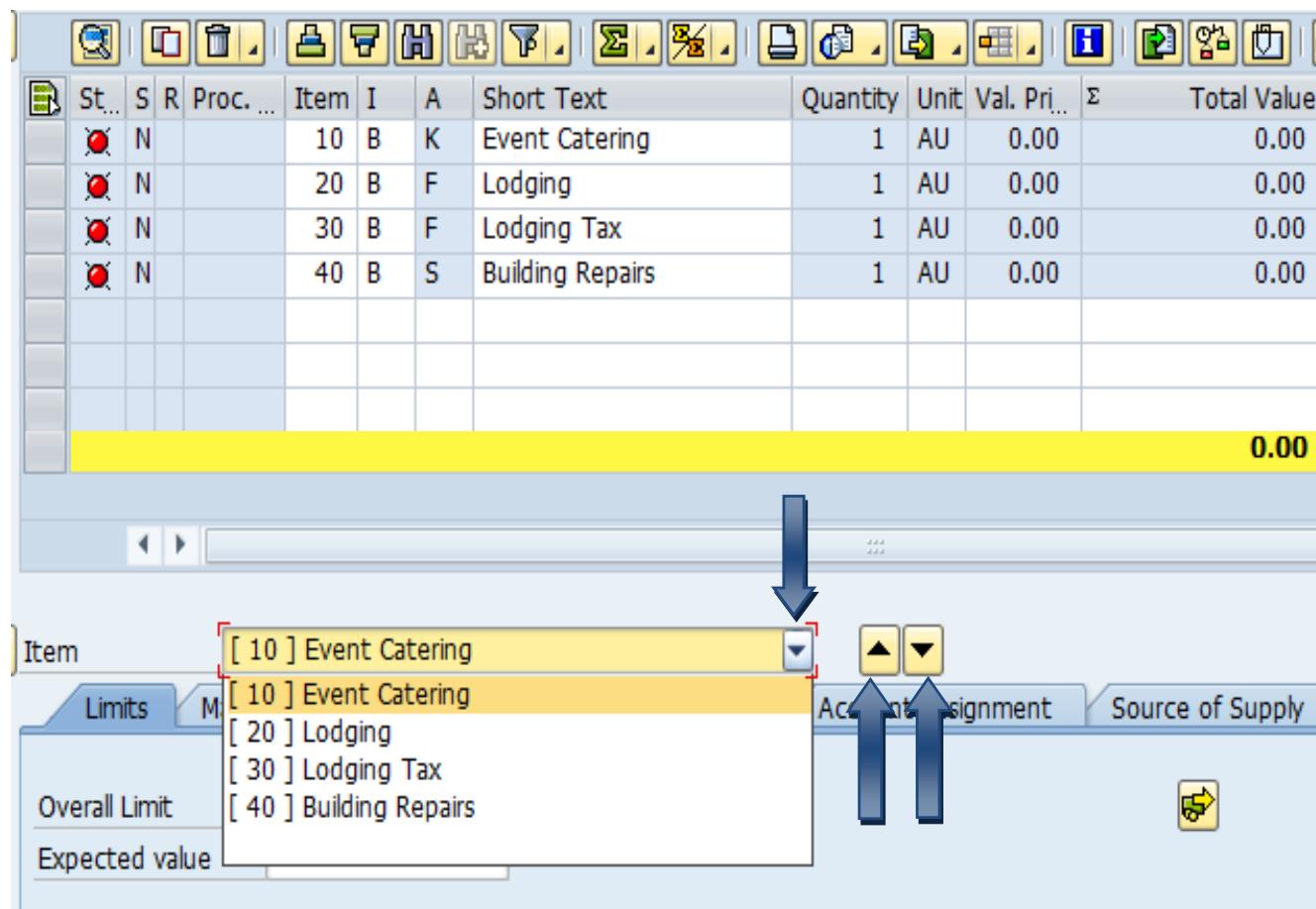
Overall Limit USD No limit

Expected value

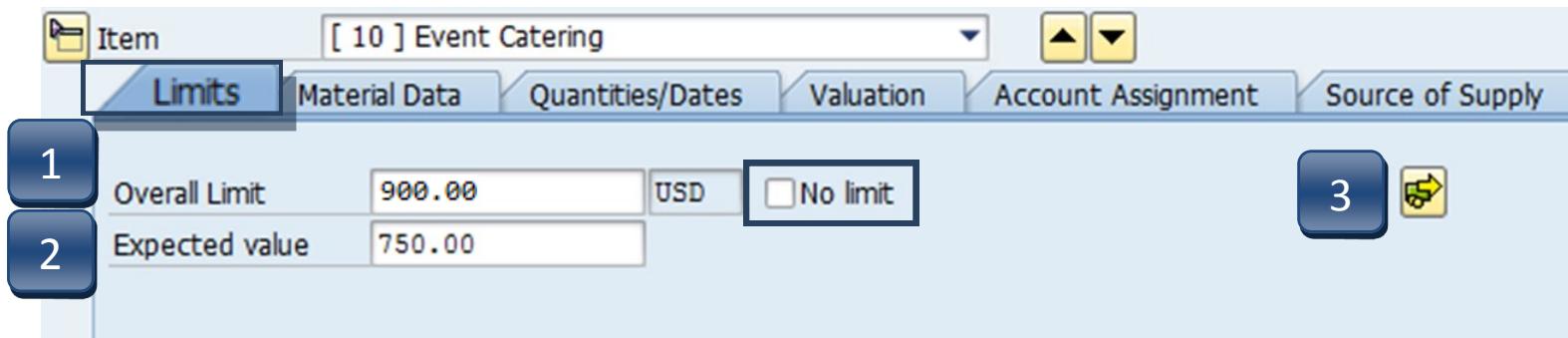
Maintain services or limits for Item 00010

Create a Limit Framework Requisition - Item Tab Detail

Navigation between line items in the Tabs section can be executed by clicking the up or down arrows or selecting the item field drop-down menu.



Create a Limit Framework Requisition - Item Tab Detail



Limits Tab

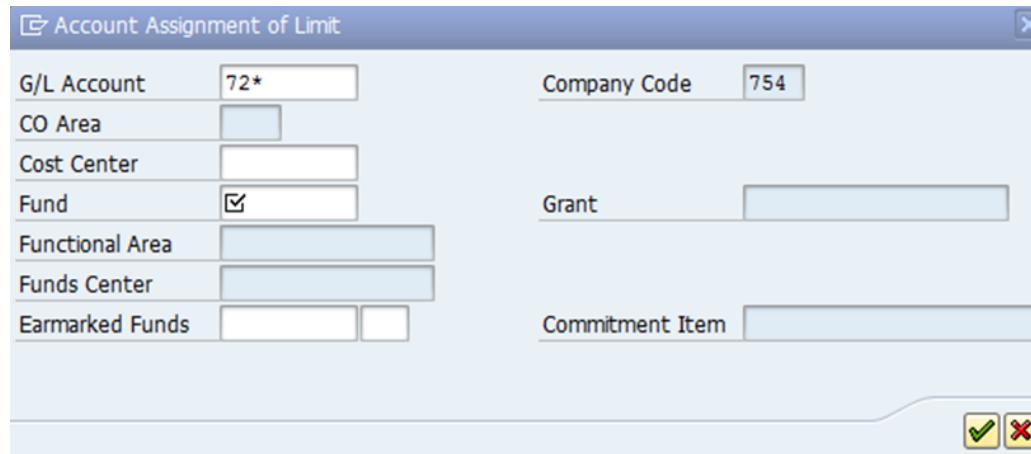
STEP 1: Enter **Overall Limit** (cushion amount Accounts Payable can pay up to) in Overall Limit field.

****No limit** should *never* be selected.

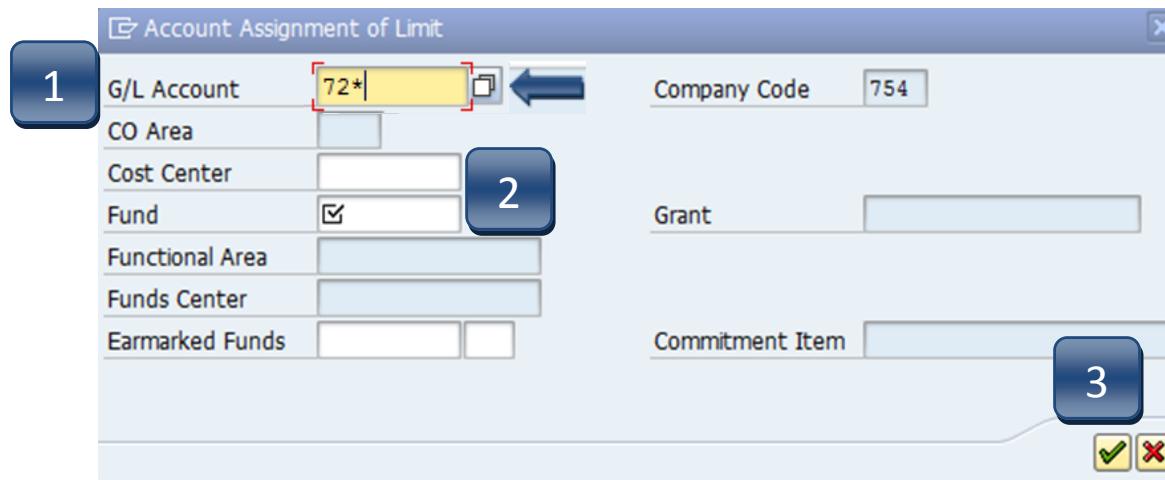
STEP 2: Enter **Expected value** (amount to be encumbered) in Expected value field. This amount is never larger than the Overall Limit field.

STEP 3: Click the **Account Assignment** (yellow arrow) button to enter the GL, Cost Center, Internal Order, or Statistical Order, as well as the Fund.

Account Assignment of Limit menu appears. See next pages for entry instructions.



Create a Limit Framework Requisition - Item Tab Detail



Account Assignment of Limit - Cost Center (K)

STEP 1: Enter **GL** number.

***GL/Asset Reference guide or Database Search can be used if GL is unknown.*

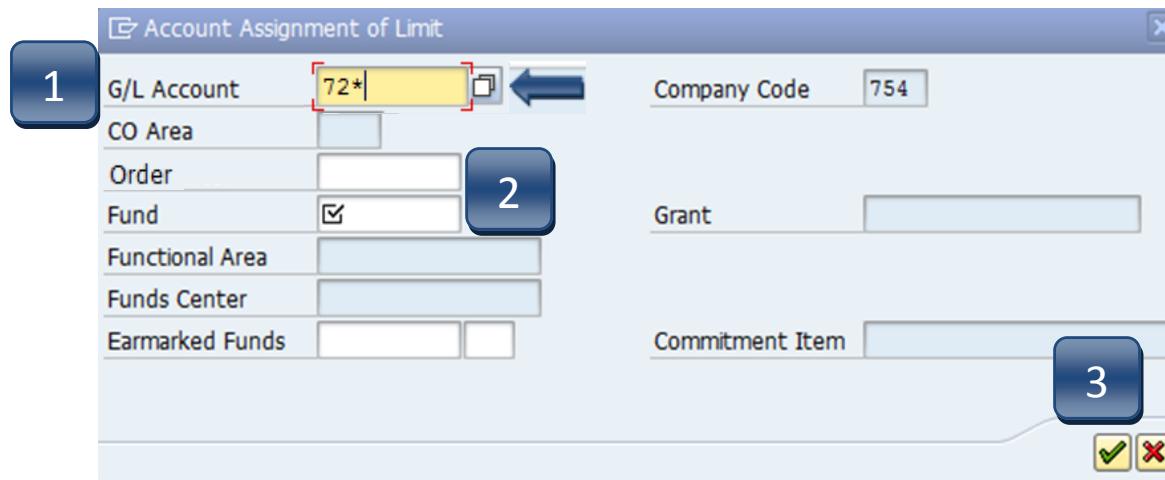
STEP 2: Enter **Cost Center** and **Fund**.

***Earmarked Funds will be left blank.*

STEP 3: Click the green check.

Multiple Funding CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail



Account Assignment of Limit - Internal Order (F)

STEP 1: Enter **GL** number.

***GL/Asset Reference guide or Database Search can be used if GL is unknown.*

STEP 2: Enter **Order** and **Fund**.

***Earmarked Funds will be left blank.*

STEP 3: Click the green check.

Multiple Funding CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail

1

2

3

Account Assignment of Limit - Statistical Internal Order (S)

STEP 1: Enter **GL** number.

***GL/Asset Reference guide or Database Search can be used if GL is unknown.*

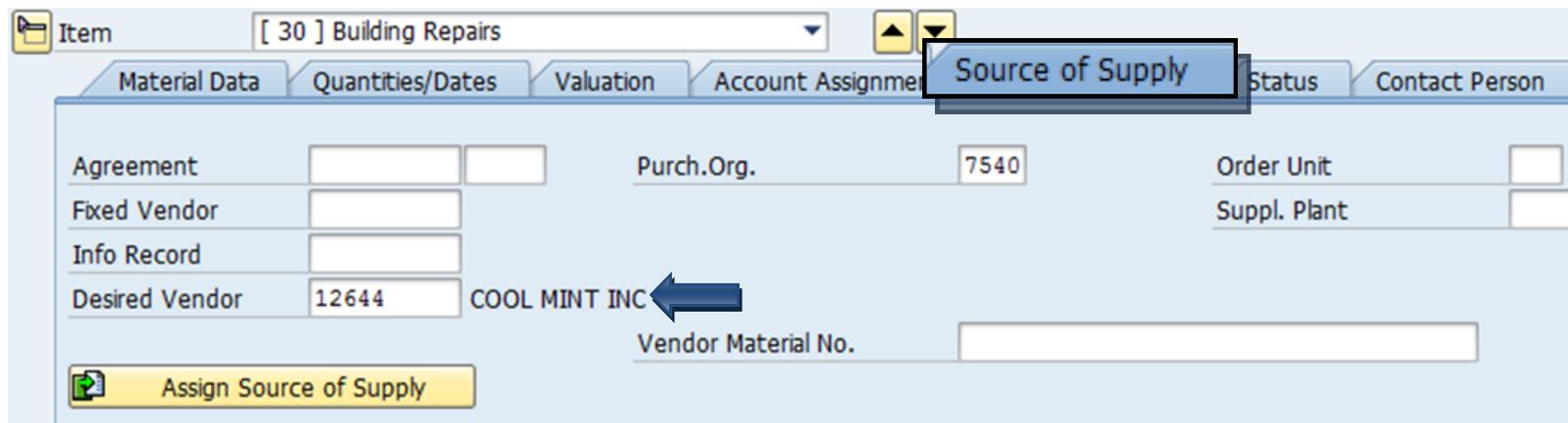
STEP 2: Enter **Cost Center, Order, and Fund.**

***Earmarked Funds will be left blank.*

STEP 3: Click the green check.

Multiple Funding CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail



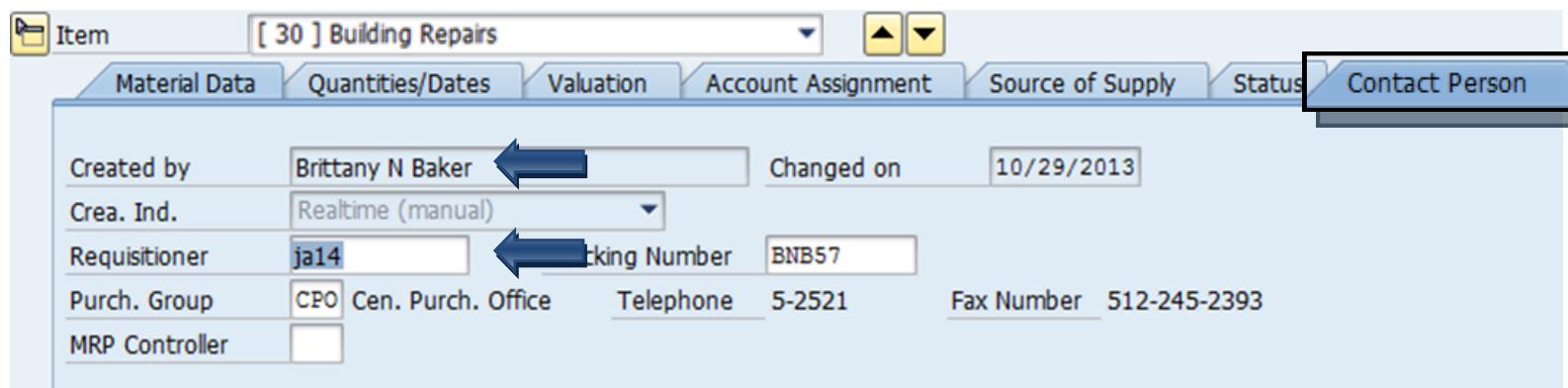
Item [30] Building Repairs

Material Data Quantities/Dates Valuation Account Assignment **Source of Supply** Status Contact Person

Agreement Purch.Org. 7540 Order Unit
Fixed Vendor Suppl. Plant
Info Record
Desired Vendor 12644 COOL MINT INC
Vendor Material No.

 Assign Source of Supply

Source of Supply Tab: Verify vendor listed is correct.



Item [30] Building Repairs

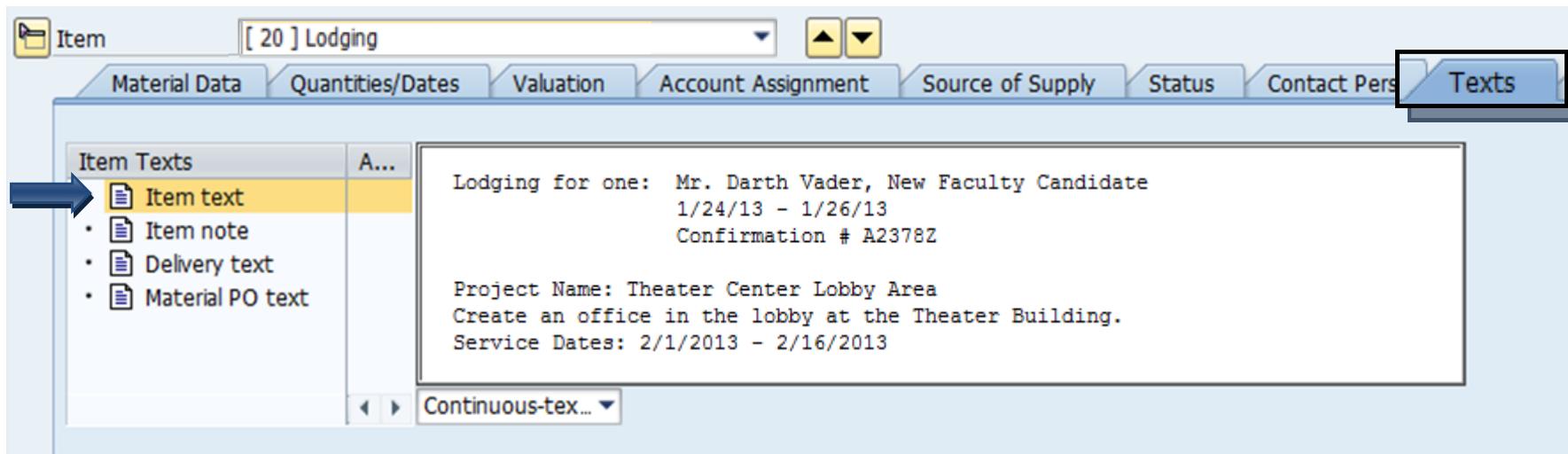
Material Data Quantities/Dates Valuation Account Assignment Source of Supply **Status** **Contact Person**

Created by Brittany N Baker Changed on 10/29/2013
Crea. Ind. Realtime (manual)
Requisitioner ja14 Work Number BNB57
Purch. Group CPO Cen. Purch. Office Telephone 5-2521 Fax Number 512-245-2393
MRP Controller

Contact Person Tab:

The person creating the requisition will be listed in the **Created by** field. Requisitioner will be listed in the **Requisitioner** field. Other contact information will be listed. Purchasing will contact this person if there are any questions/issues with the requisition.

Create a Limit Framework Requisition - Item Tab Detail



Texts Tab: Insert any notes that you would like **printed** on the purchase order:

Lodging requisitions

- **WHO** will be staying.
- **DATES** of their stay.
- **CONFIRMATION** or **RESERVATION** number.

Contract requisitions

- **PAYMENT SCHEDULE** or **TERMS** with **DATES**.
- **DATES** of **ENTIRE CONTRACT** or **SERVICE**.
- Brief **STATEMENT** of **WORK**.

Create a Limit Framework Requisition - Check, Save, and Submit

STEP 1: Click the **Check** icon to check for errors.



SAP will check your requisition and generate a window that displays found errors.

-If any errors are found, click the green check to close the message window. Double-check your requisition to verify you have not omitted any information.

-If you have checked everything and still receive **red hard stop** errors, please contact Purchasing at 245-2521.

Typ	Message text
	Item 10
	Vendor 8207 blocked
	Item 10 Acct Assgt 1
	Enter Asset
	Item 20
	Vendor 8207 blocked
	Item 20 Acct Assgt 1
	No commitment item entered in item 00020 754 7*
	G/L account/cost element 7*/ has not been set up for updating in gran-
	Item 30
	Vendor 8207 blocked
	Item 30 Acct Assgt 1
	Enter Order
	Item 40
	Vendor 8207 blocked
	Item 40 Acct Assgt 1
	Enter Cost Center

STEP 2: If there are no errors, click **Save**.



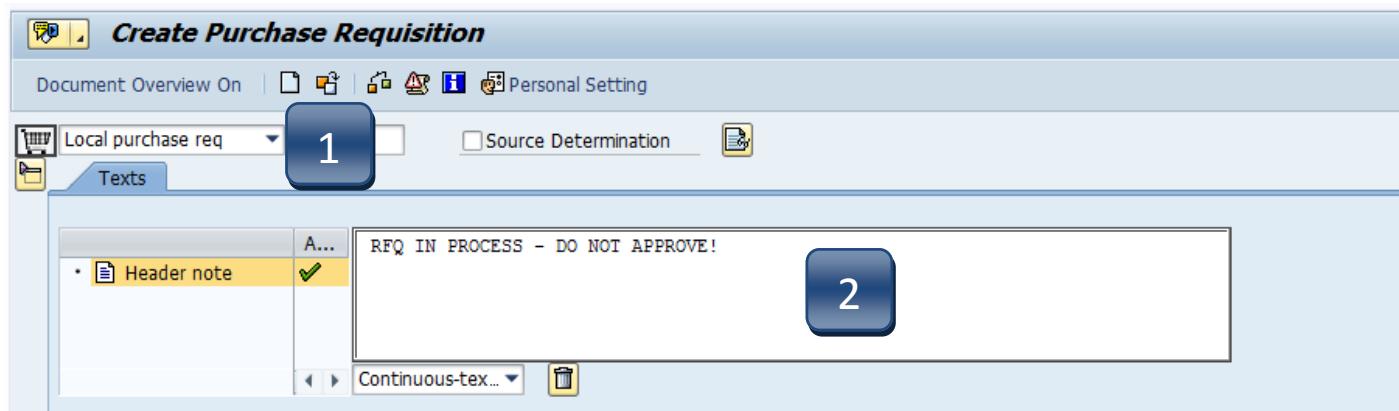
STEP 3: After you have saved, the requisition number will be displayed in the bottom left corner of the screen. Your requisition number will begin with **14** and follow with six additional numbers, example: 14057615

Create an RFQ - Requisition Creation

The entire RFQ process can be completed in the SAP web portal. Some actions can be completed in SAP GUI but other parts require completion in the Portal, as you cannot print the RFQ in GUI.

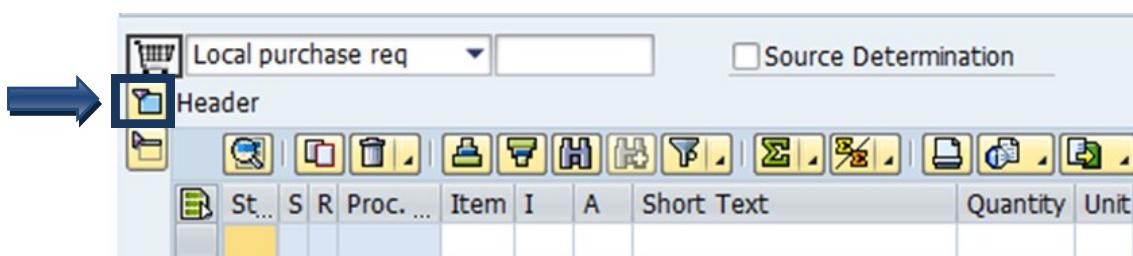
STEP 1: Create either a **LOCAL** or standard **FRAMEWORK** requisition.

****RFQs *cannot* be generated from a Limit Framework requisition. After you have completed the RFQ process, you can trash the line and create a second line if a Limit Framework is necessary.**

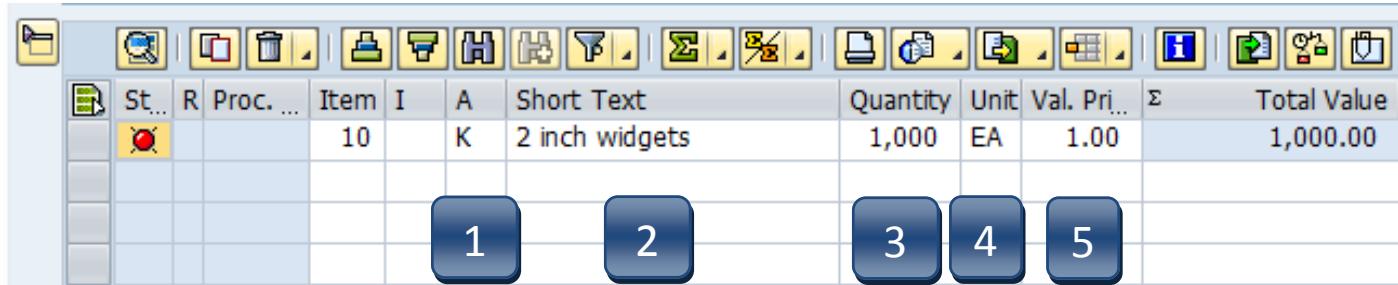


STEP 2: In **Header note** section, state that an RFQ is in process so the Account Manager *will not* approve the requisition.

****If header section is not visible, click **Expand Header** button to display.**



Create an RFQ - Requisition Creation



St...	R	Proc...	Item	I	A	Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value
			10		K	2 inch widgets	1,000	EA	1.00		1,000.00

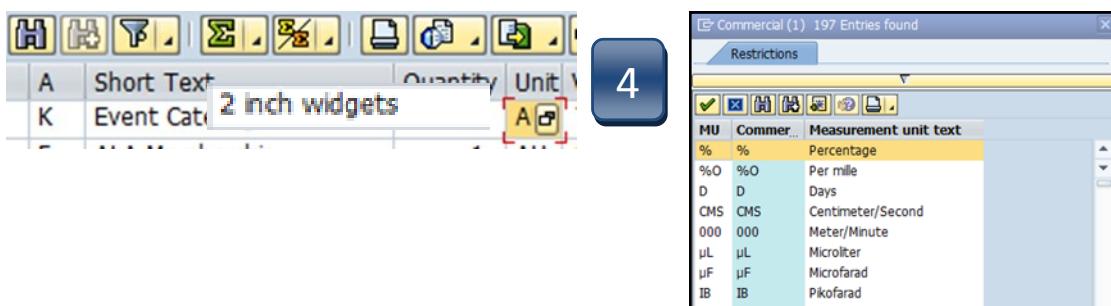
1 2 3 4 5

STEP 1: A (Account Assignment Category) column: Depending on your funding, enter **A (Asset)**, **K (Cost Center)**, **F (Internal Order)**, or **S (Statistical Order)** for each line item. (Use down arrow on keyboard to move between lines.)

STEP 2: Short Text column: Enter item short text. (What you are purchasing.)

STEP 3: Quantity column: Enter quantity. (1 if using AU as Unit of Measure.)

STEP 4: Unit of Measure column: Enter unit of measure code. If unknown, use the database search for available options. (Click the button in the lower right corner of the field.)



A	Short Text	Quantity	Unit
K	Event Cat	2 inch widgets	A

4

Restrictions		
MU	Commer...	Measurement unit text
%	%	Percentage
%O	%O	Per mille
D	D	Days
CMS	CMS	Centimeter/Second
000	000	Meter/Minute
µL	µL	Microliter
µF	µF	Microfarad
IB	IB	Pikofarad

STEP 5: Valuation Price column: Enter **\$1.00**.

Create an RFQ - Requisition Creation

GR	Matl Group	PC...	PGr	Des.Vendor	Mi...	Deliv. Date	POrg	Stor. Loc.
<input checked="" type="checkbox"/>	Goods, Supp		RFQ	700015		12/23/2013	7540	Purchasing
			CPO					
			CPO					
6	7		8	9		10	11	12

STEP 6: **GR column:** Box should be checked for GOODS, unchecked for SERVICES.

STEP 7: **Material Group column:** Enter **G1** for Goods, Supplies, & Equipment or **S1** for Services. Use the database search for additional options.

STEP 8: **PGr column:** Change from CPO to **RFQ**.

STEP 9: **Desired Vendor column:** Enter generic vendor number **700015**

STEP 10: **Delivery Date column:** Enter date goods will be delivered or services completed. (**mm/dd/yyyy**)

STEP 11: **POrg column:** Enter **7540** for each line.

STEP 12: **Storage Location column:** Use the database search to select the storage location if you do not know the code for the location.

****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-12 as many times as necessary.**

STEP 13: Hit **ENTER** on your keyboard to generate the **Item Tabs** section.

Create an RFQ - Requisition Creation

Item	[10] 2 inch widgets	▼	▲ ▼																																																								
<table border="0"> <tr> <td>Material Data</td> <td>Quantities/Dates</td> <td>Valuation</td> <td>Account Assignment</td> <td>Source of Supply</td> <td>Status</td> </tr> </table>				Material Data	Quantities/Dates	Valuation	Account Assignment	Source of Supply	Status																																																		
Material Data	Quantities/Dates	Valuation	Account Assignment	Source of Supply	Status																																																						
<table border="0"> <tr> <td></td> <td>AccAssCat</td> <td>Cost center</td> <td>Distribution</td> <td>Single account a:</td> <td>CoCode</td> </tr> <tr> <td>Unloading Point</td> <td><input type="text"/></td> <td>Recipient</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>Texas Sta</td> </tr> <tr> <td>G/L Account</td> <td><input type="text"/>730000</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>CO Area</td> <td><input type="text"/>754</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Cost Center</td> <td><input type="text"/>14131500</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fund</td> <td><input type="text"/>20000110</td> <td>Grant</td> <td><input type="text"/>NOT RELEVANT FOR</td> <td></td> <td></td> </tr> <tr> <td>Functional Area</td> <td><input type="text"/>1800</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Funds Center</td> <td><input type="text"/>1413150000</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Earmarked Funds</td> <td><input type="text"/></td> <td><input type="text"/></td> <td>Commitment Item</td> <td><input type="text"/>730000</td> <td></td> </tr> </table>							AccAssCat	Cost center	Distribution	Single account a:	CoCode	Unloading Point	<input type="text"/>	Recipient	<input type="text"/>	<input type="text"/>	Texas Sta	G/L Account	<input type="text"/> 730000					CO Area	<input type="text"/> 754					Cost Center	<input type="text"/> 14131500					Fund	<input type="text"/> 20000110	Grant	<input type="text"/> NOT RELEVANT FOR			Functional Area	<input type="text"/> 1800					Funds Center	<input type="text"/> 1413150000					Earmarked Funds	<input type="text"/>	<input type="text"/>	Commitment Item	<input type="text"/> 730000	
	AccAssCat	Cost center	Distribution	Single account a:	CoCode																																																						
Unloading Point	<input type="text"/>	Recipient	<input type="text"/>	<input type="text"/>	Texas Sta																																																						
G/L Account	<input type="text"/> 730000																																																										
CO Area	<input type="text"/> 754																																																										
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Earmarked Funds	<input type="text"/>	<input type="text"/>	Commitment Item	<input type="text"/> 730000																																																							

STEP 14: Enter **GL** and **account information** in the Account Assignment tab for each line item.

STEP 15: Click **Save**. Make note of the requisition number generated in the bottom left corner of the screen.



Create RFQ



It is *imperative* that the following 16 steps are completed in the **WEB PORTAL**. If this section is executed in *GUI*, your PDF will not generate.

4

2

3

1

Create RFQ : Initial Screen

RFQ Type AN
Language Key EN
RFQ Date 11/18/20
Quotation Deadline 12/15/2013
Purch. Organization 754
Purchasing Group RFQ
Default Data for Items
Item Category
Delivery Date T
Plant 754
Storage Location
Material Group
Req. Tracking Number

STEP 1: In the **SAP Web Portal**, enter transaction code **ME41**.

STEP 2: Enter **Quotation Deadline** date.
(Date the bids are due.)

STEP 3: Change **Purchasing Group** from CPO to RFQ.

STEP 4: Click **Reference to PReq** button.

STEP 5: Enter requisition number in **Purchase Req.** field.

STEP 6: Click the **green check** button.

5

6

Selection of Purchase Requisitions

Purchase Req.	10057865
Requisn Item	<input type="text"/>
Purch. Group	RFQ
Document Type	<input type="text"/>
Material	<input type="text"/>
MPN Material	<input type="text"/>
Plant	<input type="text"/>
Item Category	<input type="checkbox"/>
Acct Assgt Cat.	<input type="checkbox"/>
Tracking Number	<input type="text"/>
Supplying Plant	<input type="text"/>
<input checked="" type="checkbox"/> Assigned	
<input checked="" type="checkbox"/> Stock material	
<input checked="" type="checkbox"/> Open only	

Checkmarks:

Create RFQ

STEP 7: Enter the **Coll. No.** This will be your initials followed by the requisition number. Hit **Enter** on your keyboard.

Create RFQ : Header Data

RFQ	Company Code	754	Purchasing Group	RFQ	
RFQ Type	AN		Purch. Organization	7541	
Vendor					
Administrative Fields					
RFQ Date	11/18/20	Item Interval	10	Coll. No.	jn105786!
Language	EN	Subitem Interv.	1	QuotDdln	12/15/20
Validity Start		Validity End		Apply By	
		Warranty		Bindg Per.	
Terms of Delivery and Payment					
Targ. Val. <input type="text"/>					
Reference Data					
Your Reference		Salesperson			
Our Reference		Telephone			

STEP 8: Click **Select All Items**.

STEP 9: Click **Adopt + Details**.

Create RFQ : Selection List: Purchase Requisitions

Pur. Req.	Item	Material	Short Text	Plnt	SLoc	I	A	Cls	Qty	Un	C	Deliv. Date	Rel. Date
10057865	10		2 inch widgets	754	JCK	<input checked="" type="checkbox"/>	K	<input type="checkbox"/>	1,000.000	EA	12/23/2013	12/23/2013	

9 **8** **Select All Items** **Adopt** **9** **8** **Select All**

STEP 10: Click **Next** button until you are back at the **Create RFQ Item Overview** screen.

Create RFQ : Item 00010

Item	10	ItCat.	<input type="checkbox"/>	
Material		Mat. Grp	G1	
Short Text	2 inch widgets			
Quantity and Date				
RFQ Quantity	1,000	EA	QuotDdln	12/15/20
Delivery Date	12/23/20			
Deadline Monitoring				
1st Rem./Exped.	<input type="checkbox"/>	TrackingNo	<input type="text"/>	
2nd Rem./Exped.	<input type="checkbox"/>	V. Mat.	<input type="text"/>	
3rd Rem./Exped.	<input type="checkbox"/>			
No. Exped.	0			

Next **10**

Create RFQ

STEP 11: Click **Header Details**. (This option may be located under the **More** button.)

Create RFQ : Item Overview

Menu ▾ Save Back Exit Cancel System ▾ Select All Items Deselect All Select Start/End of Block Enter Lines Delete Header Details

RFQ RFQ Type AN RFQ Date 11/18/20
Vendor QuotDdln 12/15/20

RFQ Items

Item	I Material	Short Text	RFQ Quantity	OU	C Deliv. Date	Mat. Grp	Plnt	SLoc	D Tex
10		2 inch widgets	1,000	EA	12/23/2013	G1	754	JCK	

11

STEP 12: Click **Header Texts**.

Create RFQ : Header Data

Menu ▾ Save Back Exit Cancel System ▾ Overview Header Texts

RFQ Company Code 754 Purchasing Group
RFQ Type AN Purch. Organization
Vendor

Administrative Fields

RFQ Date	11/18/20	Item Interval	10	Coll. No.	JN105786
Language	EN	Subitem Interv.	1	QuotDdln	12/15/20
Validity Start		Validity End		Apply By	
		Warranty		Bindg Per.	

12

STEP 13: Click **Long Text Screen**.

Create RFQ : Header Texts

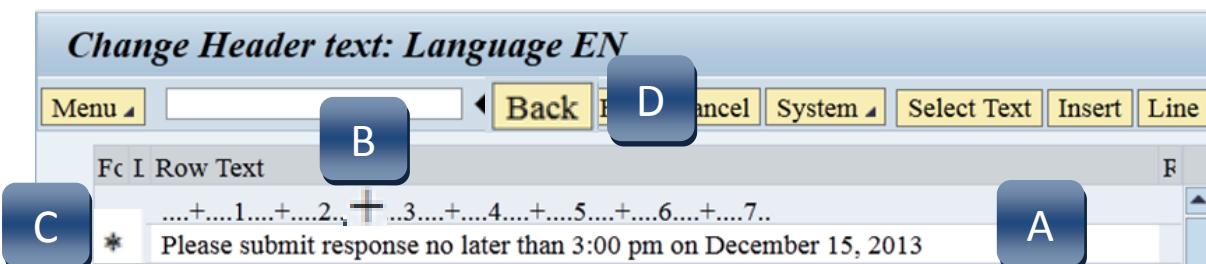
Menu ▾ Save Back Exit Cancel System ▾ Long Text Screen

Purchasing Doc. Company Code 754 Purchasing Group
Document Type AN Purch. Organization
Vendor

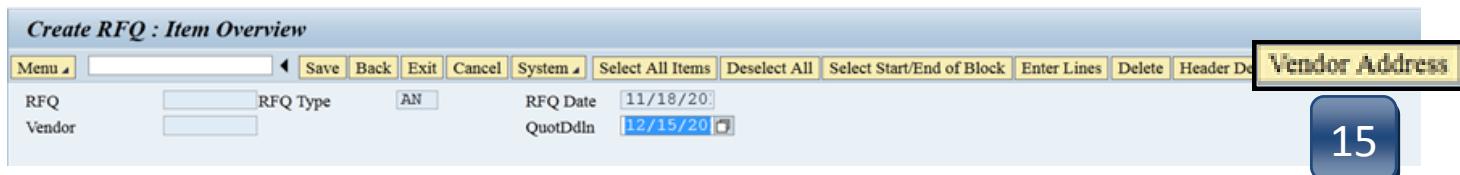
13

Create RFQ

STEP 14: A. Enter any message you want the respondents to know; this will appear on the RFQ.
B. If you use more than one line, enter the **+ sign** in the space next to the subsequent lines.
C. Leave the ***** on the first line.
D. Click the **Back** button until you get to **Item Overview**.

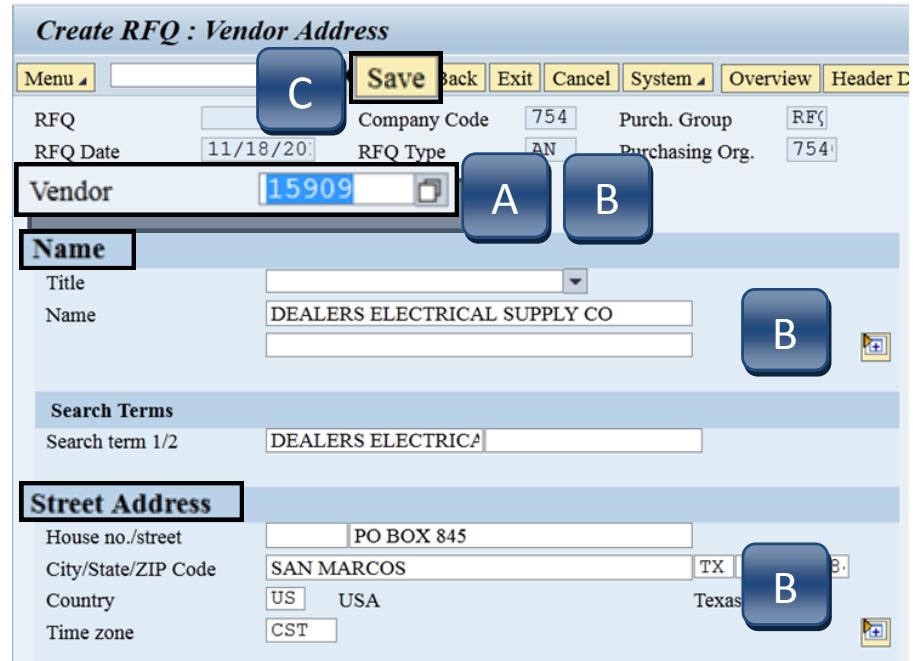


STEP 15: Click **Vendor Address**. (This option may be located under the **More** button.)



STEP 16:

A. Type in vendor number and hit **Enter** on your keyboard.
B. If vendor is *not* in SAP, enter a generic vendor number in the Vendor field and type in their **Name/Address** information. Hit **Enter** on your keyboard.
C. Click **Save**.
(A PDF of the RFQ will generate.)



Create RFQ

STEP 16: **D.** Print or Save this RFQ and close PDF. This is what you will send to the vendors along with your specifications (if any). Do this for all vendors you wish to solicit.

E. Click Exit button in the Create RFQ screen to get back to the menu screen.

D

 Texas State University | SAN MARCOS
A member of the Texas State University System

DEALERS ELECTRICAL SUPPLY CO.
PO BOX 845
SAN MARCOS, TX 78667-0845

Vendor ID Number with an - (00000)

Solicitation Instructions:

- Respondent is contractually bound to execute the entire solicitation including initial or subsequent amendments, specifications and terms.
- It is the Respondent's sole responsibility to deliver a response as or before the specified due date and time to the location specified for quotation submission.
- University's Standard Terms:
 - Delivery: FOB DESTINATION, FREIGHT PREPAID AND ALLOWED unless otherwise specified below.
 - Payment NET 30 DAYS in accordance with TX Gov't Code Inc. 22.001(d) for payment of contracts.
- Failure to sign will disqualify respondent. Failure to sign must have the solicitation in hand for this in the event of an award. Signing with a false-extrinsic or a material breach of contract and shall void the submitted response, or any resulting award.
- Respondent is to make any changes to the response any exceptions to the original delivery, specifications or terms and conditions. Failure to take exception will require, in the event of an award, that the Respondent furnish exactly as specified.
- Any proposed delivery date will not be considered unless specifically requested, and Respondent will be responsible for any resulting late delivery or cancellation if such a date is specified.
- Market administration of Respondent's terms and conditions for university's award.
- If offering other than submitted, Respondent should state, as applicable, manufacturer, brand or trade name, and/or other description, including, but not limited to, part or catalog number.

Information, documentation, and other material submitted in connection with this solicitation, or any resulting contract may be subject to public disclosure pursuant to Chapter 552 of the Texas Government Code (the "Public Information Act").

Please submit response no later than 3:00 pm on December 15, 2013

Item Description	Quantity	Unit	Unit Price(\$)	Extension(\$ x #)
Required Delivery				Faxed/Email Delivery
00000 2 inch wdgts	3,000	each		
				12/15/2013

E

Create RFQ : Vendor Address

Menu ▾ Save Back Exit Cancel System ▾ Overview Header D

RFQ	Company Code	Purch. Group	RFQ
RFQ Date	11/18/20	RFQ Type	Purchasing Org. 754
Vendor	15909		

Name

Title:

Name: DEALERS ELECTRICAL SUPPLY CO

Search Terms

Search term 1/2: DEALERS ELECTRICAL

Street Address

House no./street: PO BOX 845

City/State/ZIP Code: SAN MARCOS TX 78667-0845

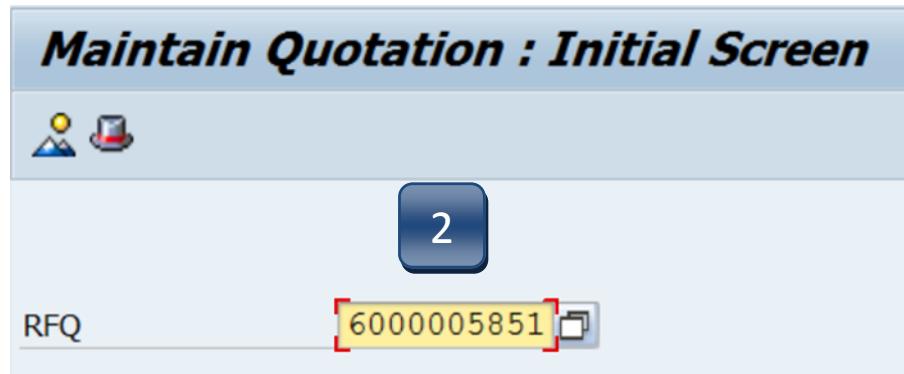
Country: US USA Texas

Time zone: CST

Create an RFQ - Maintain Quote

STEP 1: In the SAP Portal or GUI, enter transaction code **ME47**.

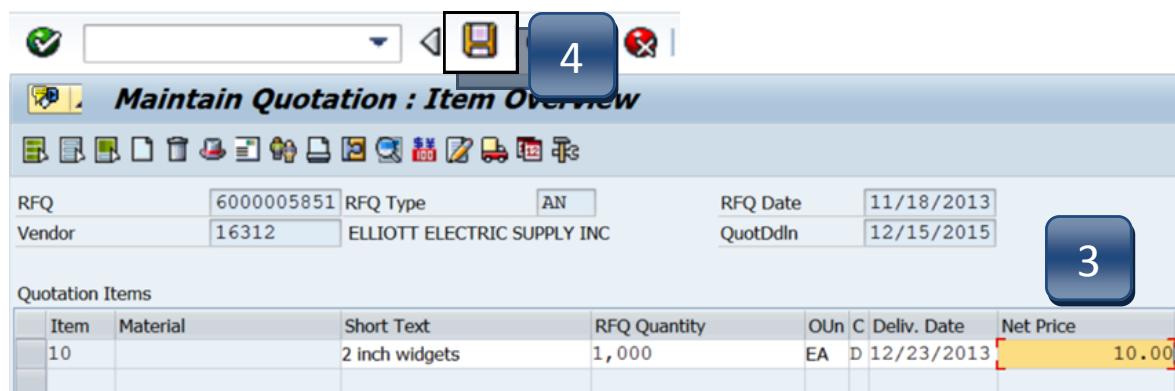
STEP 2: In the **RFQ** field, enter one of the RFQ numbers and hit **Enter** on your keyboard.



STEP 3: Enter the amount of the bid in the **Net Price** column. This will include shipping, if applicable.

****If there is a “no Bid,” enter **\$1.00**.**

STEP 4: Click **Save**.



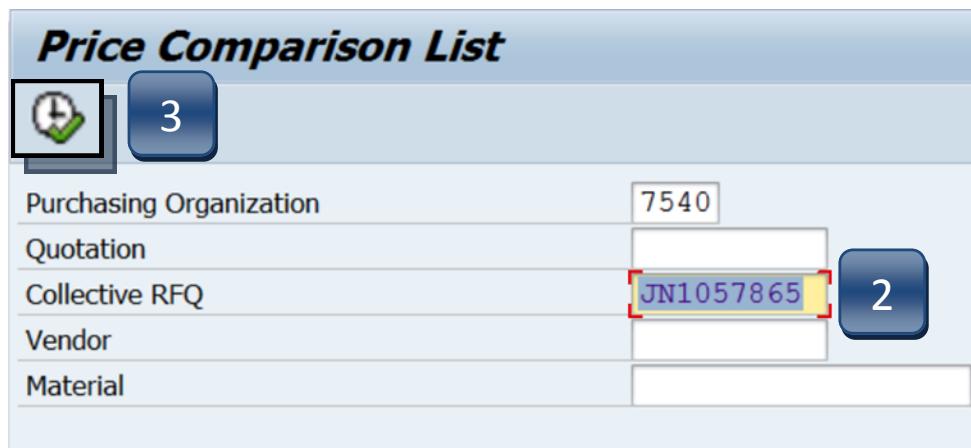
****Repeat steps 1 - 4 until all RFQ responses have been entered.****

Create an RFQ - Price Comparisons

STEP 1: In the SAP Portal or GUI, enter transaction code **ME49**.

STEP 2: In the **Collective RFQ** field, enter the Collective number.

STEP 3: Click **Execute**.



STEP 4: Double click in the area where the bid is.

Price Comparison List in Currency USD				
Quotation Vendor Additional Info Help				
Material Mat. Group	Quot.:	6000005854	6000005856	6000005855
Sh. Text	Bidder:	16312	502232	15909
Qty. in Base Unit	Coll. No. :	JN10057866	JN10057866	JN10057866
G1	Val.:	10,000.00	11,250.00	12,500.00
2 inch widgets	Price	10.00	11.25	12.50
1,000 EA	Rank:	89 %	100 %	111 %
Total Quot.	Val.:	10,000.00	11,250.00	12,500.00
	Rank:	1 89 %	2 100 %	3 111 %

Create an RFQ - Price Comparisons

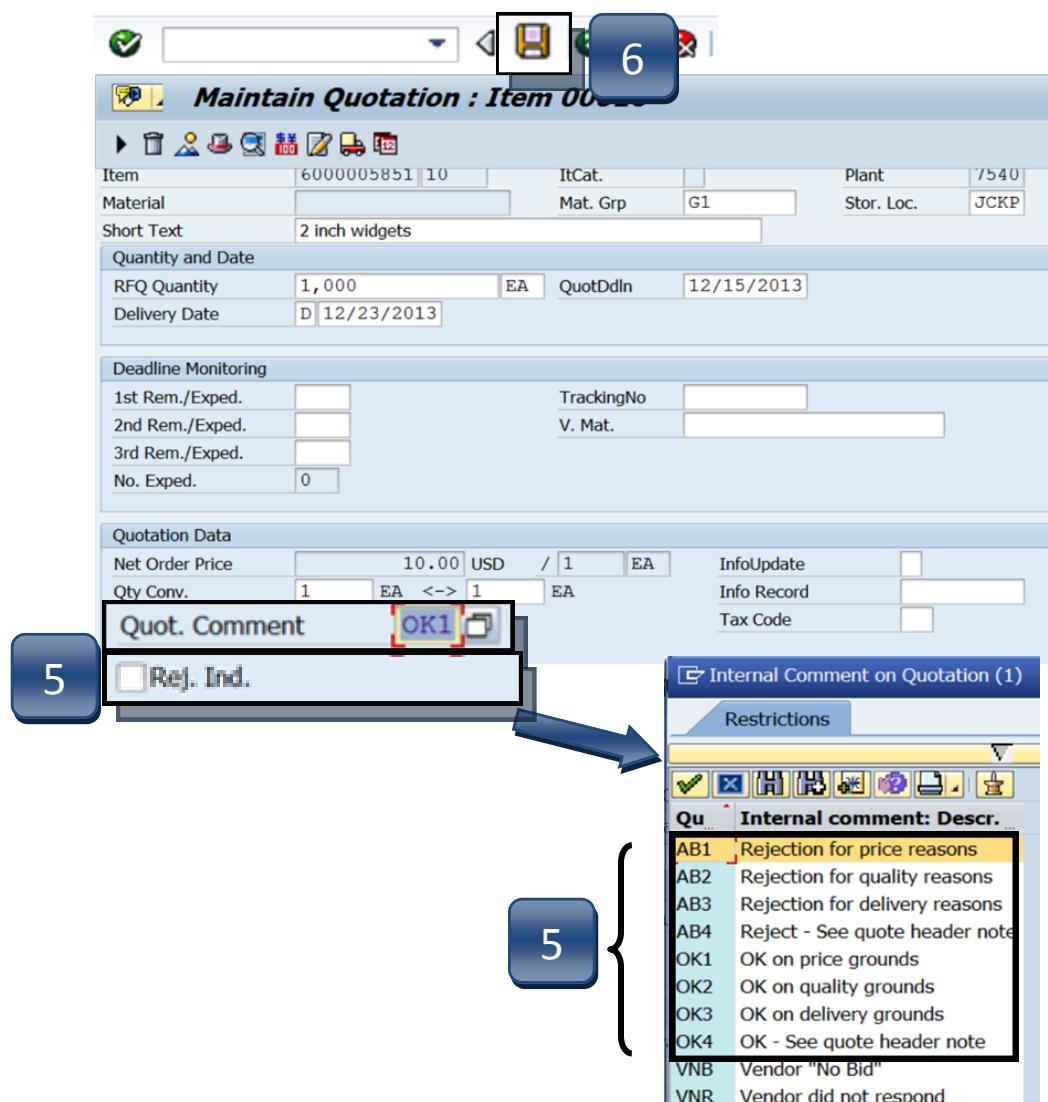
STEP 5: Click the selection box next to **Quot. Comment** field and choose one of the options from the pop-up menu.

* *For the vendor that will be *awarded*, choose one of the **OK** options.

* *For vendors *not awarded*, choose one of the rejection reasons from the options and check the **Rej. Ind. Box**.

STEP 6: Click **Save**.

STEP 7: Follow **STEPS 4-6** for all other vendors.



Create an RFQ - Review & Revise RFQ

REVIEW

STEP 1: Enter transaction code ME4S.

STEP 2: Enter the **Collective number**.

STEP 3: Change **Purchasing Group** from CPO to **RFQ**.

STEP 4: Click **Execute**.

You will then see all of the respondents & their pricing.

RFQs per Collective Number

						4
Collective number <input type="text" value="jn1057865"/>						2
Purchasing organization <input type="text" value="7540"/>						
Scope of List <input type="text" value="ANFR"/>						
Selection Parameters <input type="text"/>						
Document Type <input type="text"/>						
Purchasing Group <input type="text" value="RFQ"/>						3
Plant <input type="text" value="7540"/>						

REVISE

STEP 1: Enter transaction code **ME42**.

STEP 2: Enter the RFQ number you wish to revise & hit **enter** on your keyboard. You can enter additional information (payment, shipping terms) in the **Header Detail** option or revise any other data.

RFQ

Change RFQ : Item Overview

		3																		
		2																		
RFQ	6000005851	RFQ Type	AN																	
Vendor	16312	ELLIOTT ELECTRIC SUPPLY INC																		
RFQ Items																				
Item	I	Material	Short Text	RFQ Q																
10			2 inch widgets																	

6.13

Create an RFQ - Update Requisition & Finish

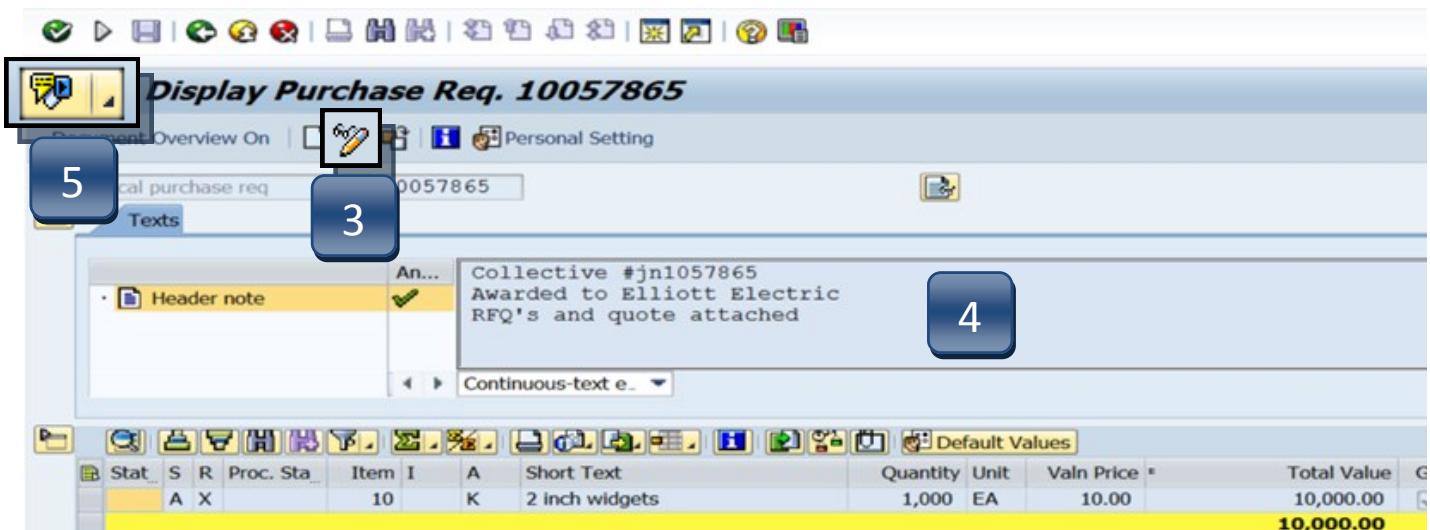
STEP 1: Enter transaction code **ME53**.

STEP 2: Type in requisition number and hit **Enter** on your keyboard.



STEP 3: Click **Display/Change** button to open requisition for editing.

STEP 4: In the **Header note** section, enter the **Collective Number**, **Vendor Awarded**, and that the **RFQs and Quote are attached**.



STEP 5: Attach all RFQ documents to the requisition. If unsure how to attach documents to a requisition, see **Attaching Documents Section**.

Create an RFQ - Update Requisition & Finish

STEP 6: Verify that the correct **amount** and **vendor** have been brought forward and that the **PGr** is **CPO**.

The screenshot shows the SAP Purchase Requisition (RFQ) screen. The title bar says "Display Purchase Req. 10057865". The "Texts" tab is selected. A note titled "Header note" contains the text: "Collective #jn1057865 Awarded to Elliott Electric RFQ's and quote attached". The "Continuous-text" field is shown below. The "Default Values" section at the bottom right shows "PGr" set to "CPO" and "Desired Vendor" set to "16312". The "Total Value" field shows "10,000.00" and "10,000.00". A blue box labeled "8" is over the header note icon, and a blue box labeled "6" is over the "Total Value" field.

STEP 7: Add any additional information in the **Text tab**, such as special payments or shipping instructions.

The screenshot shows the SAP Item screen. The "Texts" tab is selected. In the "Item Texts" section, there is a note titled "Item text" with the content "Special payment or shipping instructions". A blue box labeled "7" is over the "Texts" tab.

STEP 8: Click **Save**.

Your requisition is now ready for approval by the Account Manager.

Reprint an RFQ

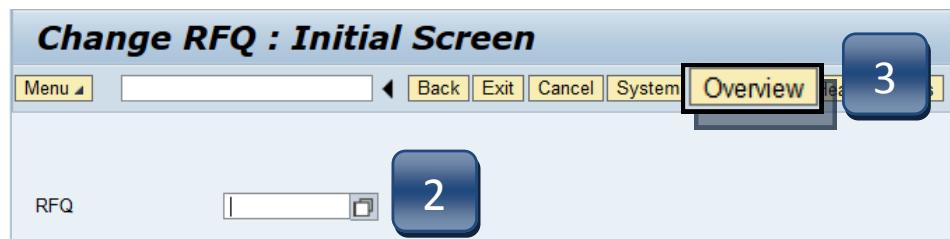


The following 10 steps must completed in the **WEB PORTAL**.
If this section is executed in *GUI*, your PDF will not generate.

STEP 1: Enter transaction code **ME42** (change RFQ).

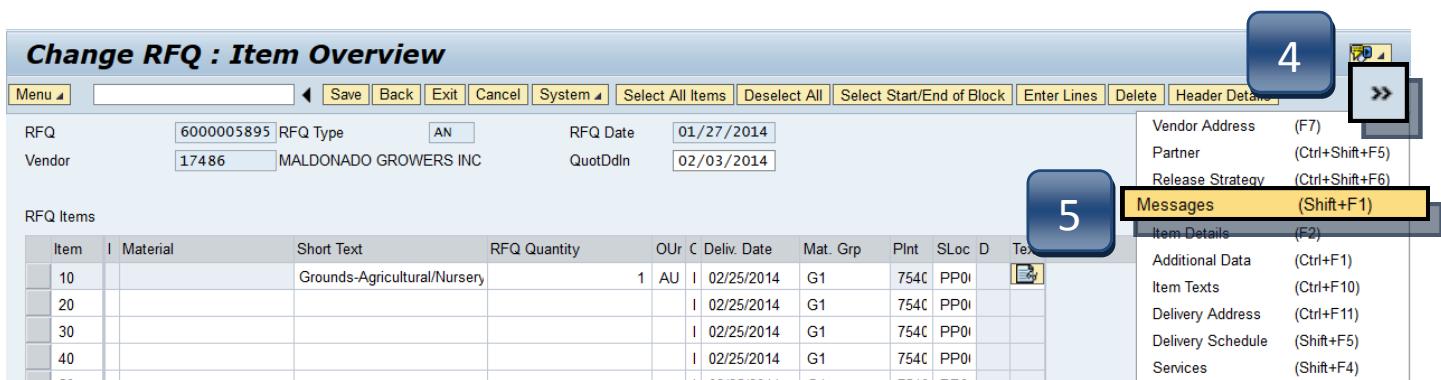
STEP 2: Enter RFQ number.

STEP 3: Select **Overview**.



STEP 4: Select **More** (double arrow to the right of **Header Details** button).

STEP 5: Select **Messages**.



Reprint an RFQ

STEP 6: Highlight the line with the green light.

Change RFQ :: Output

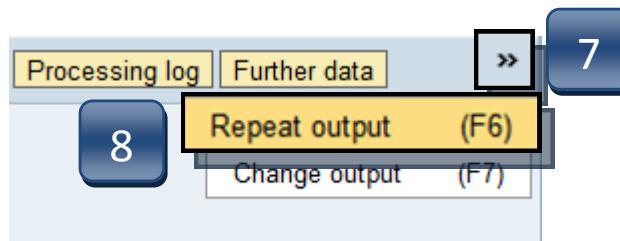
Menu ▾ Save Back Exit Cancel System ▾ New entries Delete (once)

RFQ..... 6000005895

6 Output		Status	Output T	Description	Medium	Funct	Partner	Langl	Ch	F
COO	NEU	RFQ	Print output	VN	17486	EN	<input checked="" type="checkbox"/>	0		

STEP 7: Select More (double arrow to the right of Header Details button).

STEP 8: Select Repeat Output.



STEP 9: Click Save. ****Wait 5-6 seconds.**

STEP 10: Click Back button until you get to the Main Menu. RFQ PDF should appear.

Change RFQ :: Output

Menu ▾ Save Back Exit

RFQ..... 6000005895

Create an RFQ - Generic Vendor Numbers

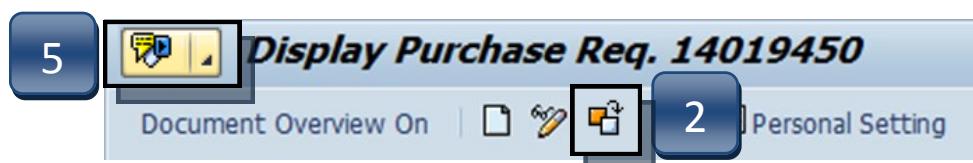
700005	Native American, Female Owned
700006	Native American, Male Owned
700007	Asian, Female Owned
700008	Asian, Male Owned
700009	Black, Female Owned
700010	Black, Male Owned
700011	Hispanic, Female Owned
700012	Hispanic, Male Owned
700013	Women Owned
700015	Not a HUB

Attach Document to Requisition - GUI

STEP 1: Enter transaction code **ME53N** in main menu search field.
Hit **Enter** on your keyboard. The last requisition accessed will appear.



STEP 2: Select **Other Purchase Requisition**.



STEP 3: Select Document box appears. Enter requisition number in **Purchase Requisition** field. Make sure **Purch. Requisition** is selected.

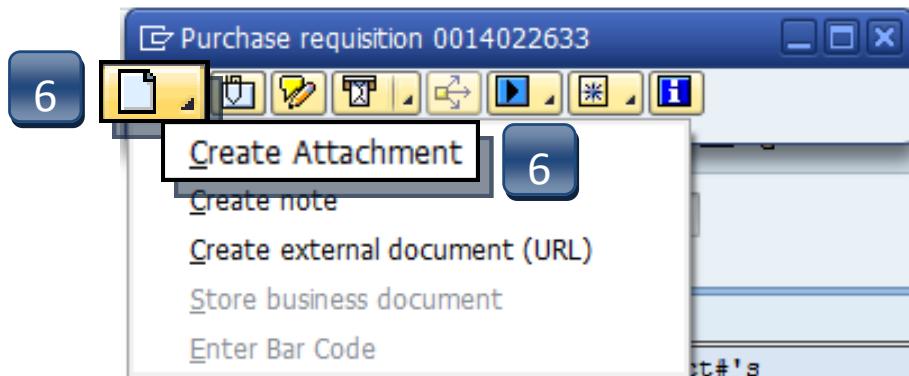


STEP 4: Click **Other Document** button. Requisition will appear.

STEP 5: In upper left corner, next to the words Display Purchase Req., select **Services for Object** button.

Attach Document to Requisition - GUI

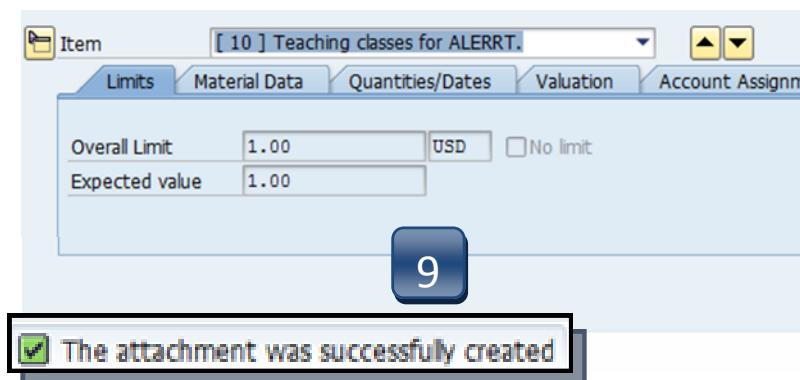
STEP 6: Select **Create**, then **Create Attachment** from drop-down menu.



STEP 7: **Import File** box will appear. Select file from wherever you have it saved.

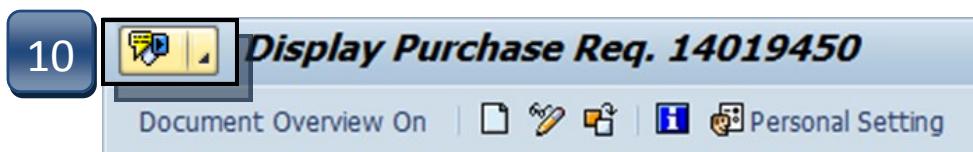
STEP 8: Click **Open**.

STEP 9: Attachment has been saved to the requisition. SAP will generate a system message at the bottom left corner of the screen:

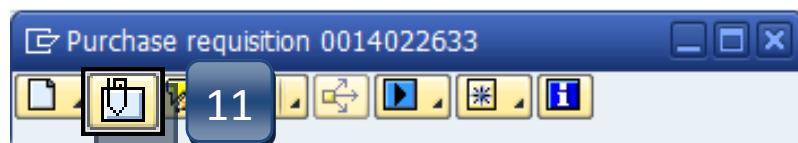


Attach Document to Requisition - GUI

STEP 10: To view list of attachments for the requisition, repeat **STEP 5.** (Select **Services for Object** button.)



STEP 11: Select **Attachment list** button.



STEP 12: Attachment list will appear with your new attachment.

STEP 13: Click **green check** or **red x** button to close window.

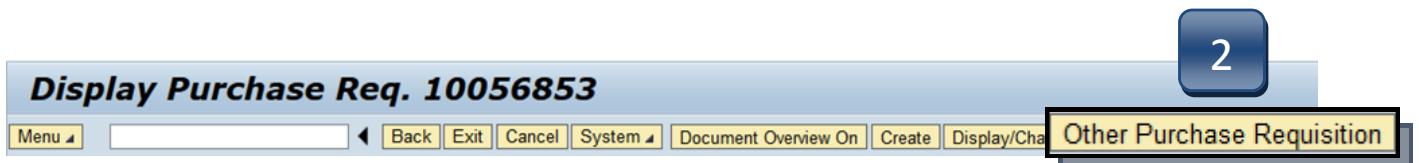


Attach Document to Requisition - Portal

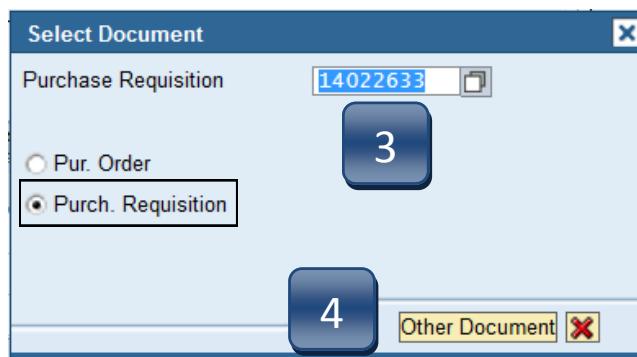
STEP 1: Enter transaction code **ME53N** in main menu search field.
Hit **Enter** on your keyboard. The last requisition accessed will appear.



STEP 2: Select **Other Purchase Requisition**.



STEP 3: Select Document menu appears. Enter requisition number in **Purchase Requisition** field. Make sure **Purch. Requisition** is selected.



STEP 4: Click **Other Document** button. Requisition will appear.

STEP 5: In upper right corner, select **Services for Object** button.

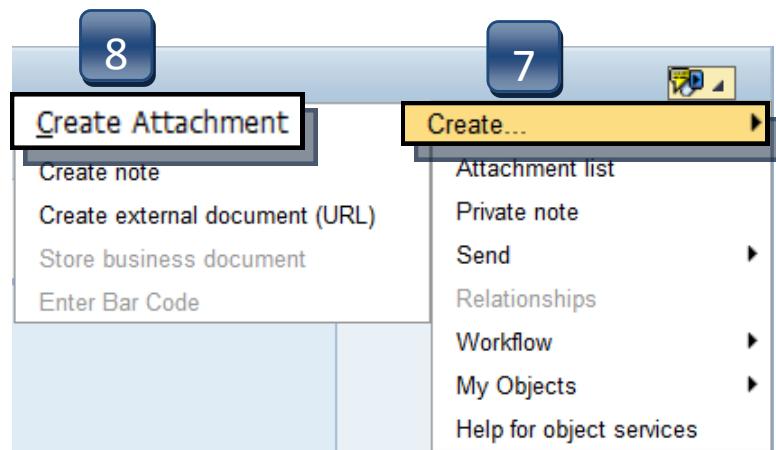


Attach Document to Requisition - Portal

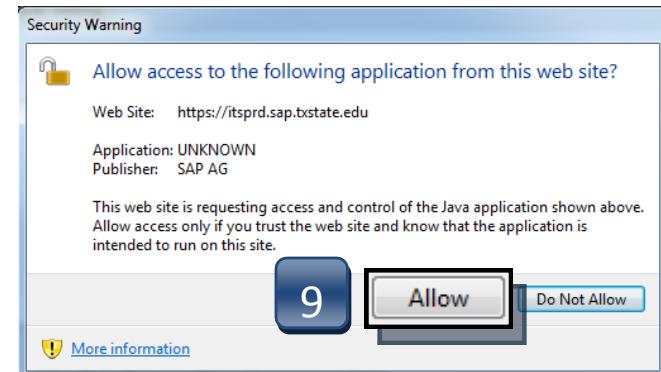
STEP 6: Select **Run, Don't Block, 'not only for this session, but always.'**, and **Yes** in the Java Applet windows if they appear.

STEP 7: Select **Create...**

STEP 8: Select **Create Attachment**.



STEP 9: Select **Allow** if Security Warning pops up.



STEP 10: **Import File** box will appear. Select file from wherever you have it saved.

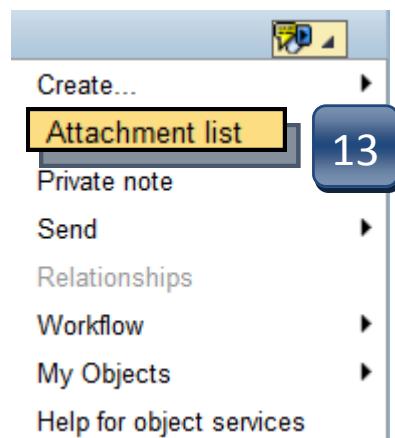
STEP 11: Click **Open**. Attachment has been saved to the requisition.

Attach Document to Requisition - Portal

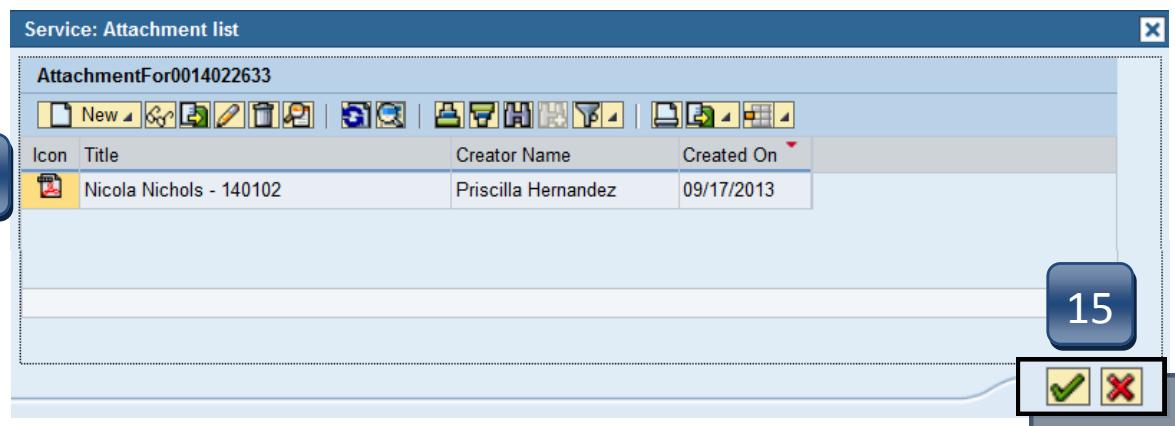
STEP 12: To view list of attachments for the requisition, repeat **STEP 5.**
(Select **Services for Object** button.)



STEP 13: Select **Attachment list** button.



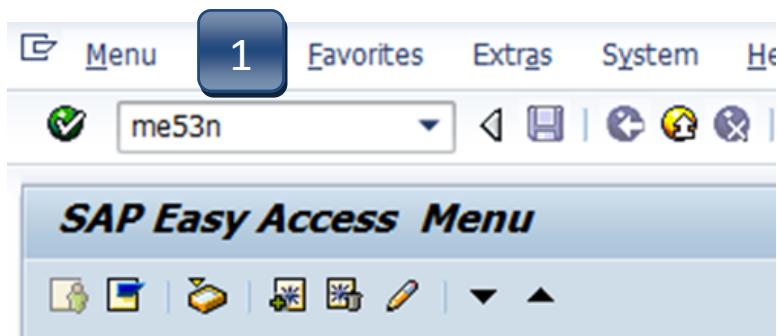
STEP 14: Attachment list will appear with your new attachment.



STEP 15: Click **green check** or **red x** button to close window.

Check Requisition Status

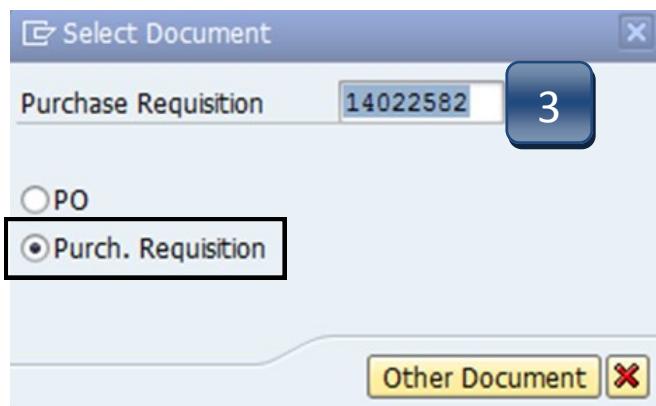
STEP 1: Enter transaction code **ME53N** in main menu search field.
Hit **Enter** on your keyboard.



STEP 2: Select **Other Purchase Requisition**.



STEP 3: Type number into **Purchase Requisition** field and select **Other Document**.
Make sure **Purch. Requisition** is selected.



Check Requisition Status

STEP 4: Navigate down to the **Release Strategy** tab.

Code	Description	Status
AM	Account Manager	✓
SP	Sponsored Programs	✓
HM	Hazardous Material	✓
PO	Purchasing Dept	✓

STEP 5: Use the navigation arrows to move between lines and check their status. All lines must complete the workflow and have green checks in their Status column before a Purchase Order will be issued.

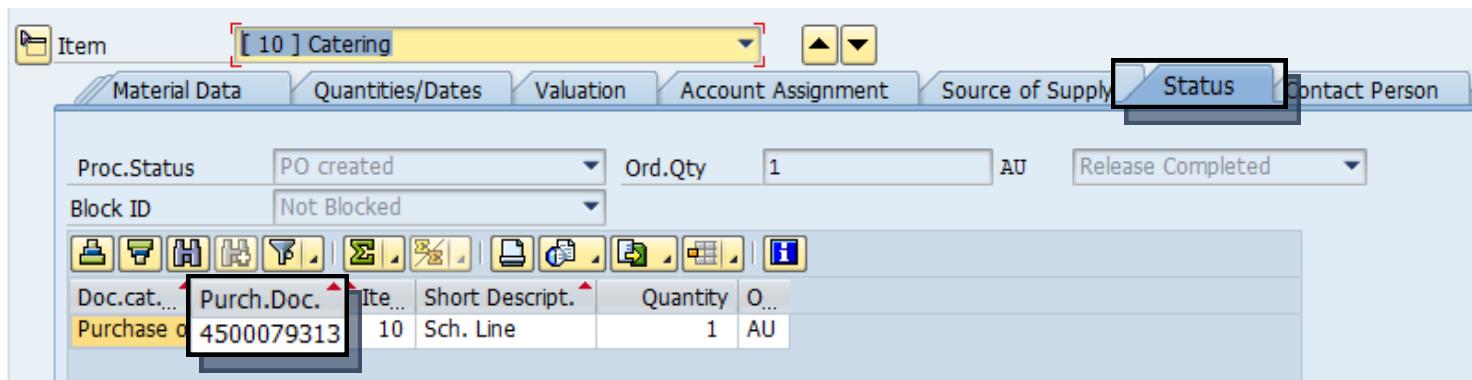


Tip

- **Completed** stages of the workflow will show a **green check** in the Status column.
- **Pending** stages will show a **yellow triangle**.
- Depending on the GL used, a requisition can travel through other workflows beside the Account Manager and Purchasing. In the example above, Line 10 has been approved by the Account Manager, Sponsored Programs, Hazardous Material, and Purchasing.

Check Requisition Status

If a Purchase Order has been issued for a requisition, it can be found in the STATUS tab under the Purchasing. Doc. column



The screenshot shows the SAP Fiori interface for a requisition. The top navigation bar includes 'Item', a search field with '10 Catering', and tabs for 'Material Data', 'Quantities/Dates', 'Valuation', 'Account Assignment', 'Source of Supply', and 'Status'. The 'Status' tab is active. Below the tabs, there are several input fields: 'Proc.Status' (PO created), 'Ord.Qty' (1), 'AU', and 'Release Completed'. The 'Block ID' is 'Not Blocked'. The main table displays requisition details: 'Doc.cat.' (Purch.Doc.), 'Item' (10), 'Short Descript.' (Sch. Line), 'Quantity' (1), and 'O...' (AU). The document number '4500079313' is highlighted in a yellow box in the 'Purch.Doc.' column.



LOCAL Requisitions

- If your requisition is a LOCAL and has been approved by the Purchasing Dept. but no PO exists, please call the Office of Procurement & Strategic Sourcing at 245-2521 or e-mail purchasing@txstate.edu.
- If e-mailing, be sure to provide a requisition number so we can investigate.

Approve or Reject Requisition

STEP 1: Go into **SAP Web portal** and select the **Worklist** tab.

STEP 2: Select **AM Release** task to process. You will see the requisition number and line in the Subject line.

The screenshot shows the SAP Web portal Worklist interface. A blue box labeled '1' highlights the 'Worklist' tab in the top navigation bar. A blue box labeled '2' points to the 'AM Release' task in the list of tasks. A blue box labeled '3' points to the 'Subject' column of the task list, which displays the requisition number. A blue box labeled '4' points to the 'Refresh' button in the toolbar at the top of the list view.

Subject	From	Sent	Status	Substituted For
AM Release eq. 14013056 / 00020	Allbright, Jacque	Oct 28, 2013	1 New	
AM Release eq. 14012756 / 00040	Allbright, Jacque	Oct 28, 2013	1 New	
AM Release eq. 14012756 / 00030	Allbright, Jacque	Oct 28, 2013	1 New	

PO Release - req. 10058370 / 00110

Sent: Yesterday by Salinas, Crystal Status: New
Priority: Normal

Attachments

Type	Title
Requisition item:	001005837000110

You can also:

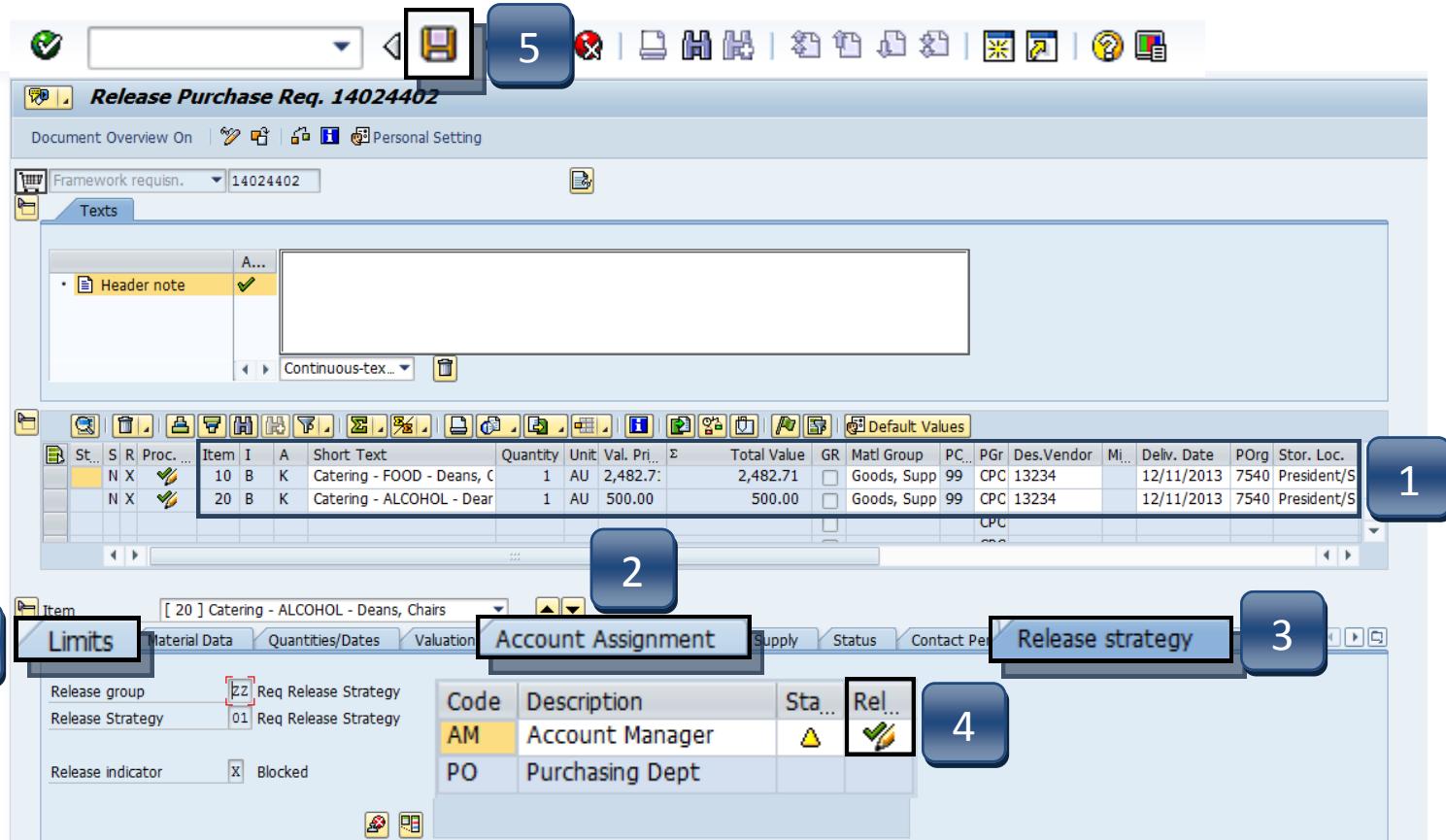
- [Add Memo](#)
- [Manage Attachments](#)
- [View History](#)

STEP 3: Follow **Approve or Reject** steps (pages 9.02 - 9.03).

STEP 4: Following task completion, click **Refresh** to see the task removed from your worklist.

Approve or Reject Requisition

APPROVE



STEP 1: Verify accuracy of requisition including storage location, goods receipt, tracking number, etc.

STEP 2: Click **Account Assignment** or **Limits** (if Limit Framework requisition) tab to review accuracy of account information.

STEP 3: Select **Release Strategy** tab to continue with the release.

STEP 4: Click **green check with pencil** to release. Repeat **STEPS 1-4** for each line.

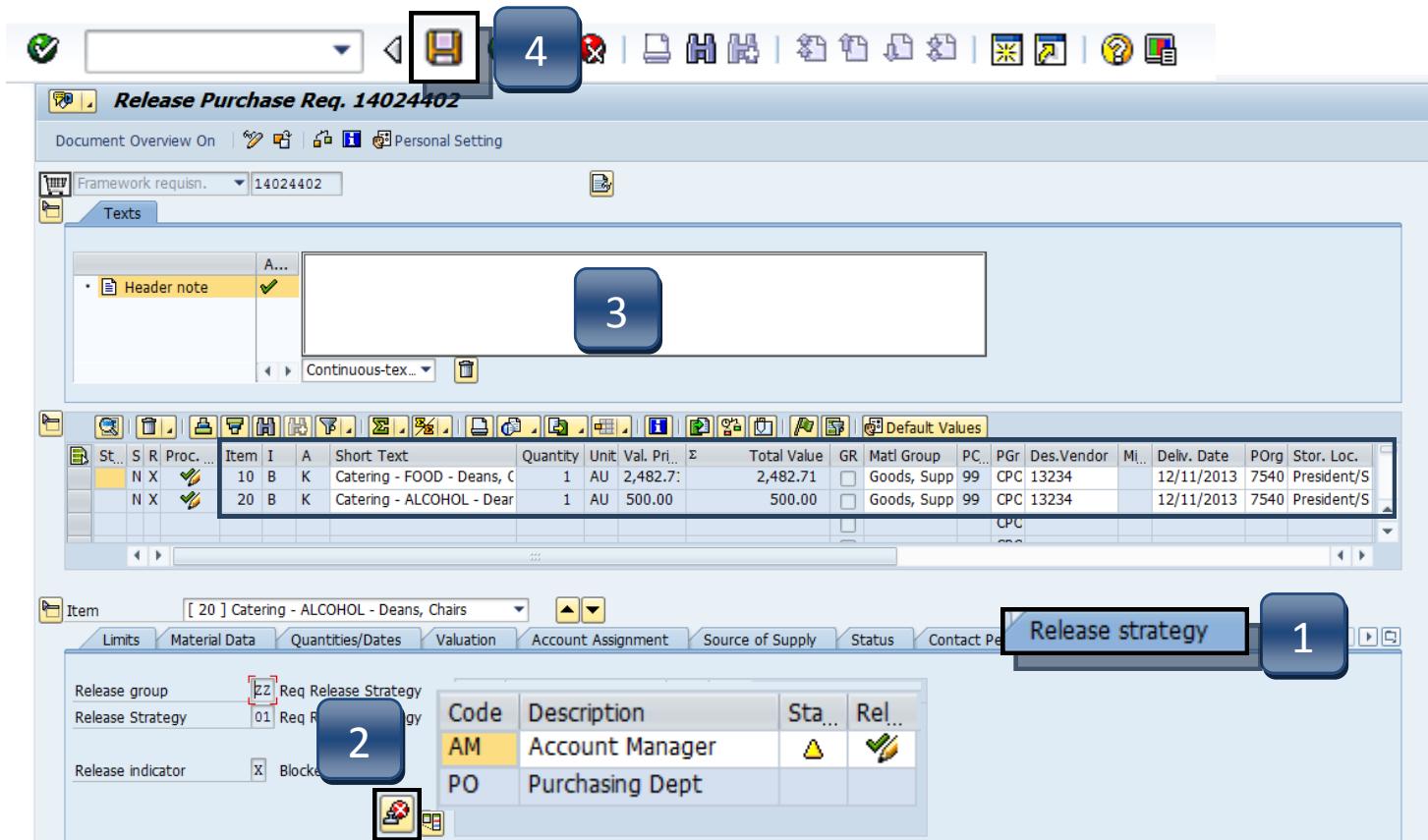
STEP 5: Click **Save**.

rev 5/14

9.02

Approve or Reject Requisition

REJECT



STEP 1: Select **Release Strategy** tab.

STEP 2: Click **Reject** button.

STEP 3: Enter appropriate comments to requisitioner in the **Header note** section. The requisitioner will use these comments when correcting the requisition.

STEP 4: Click **Save**.

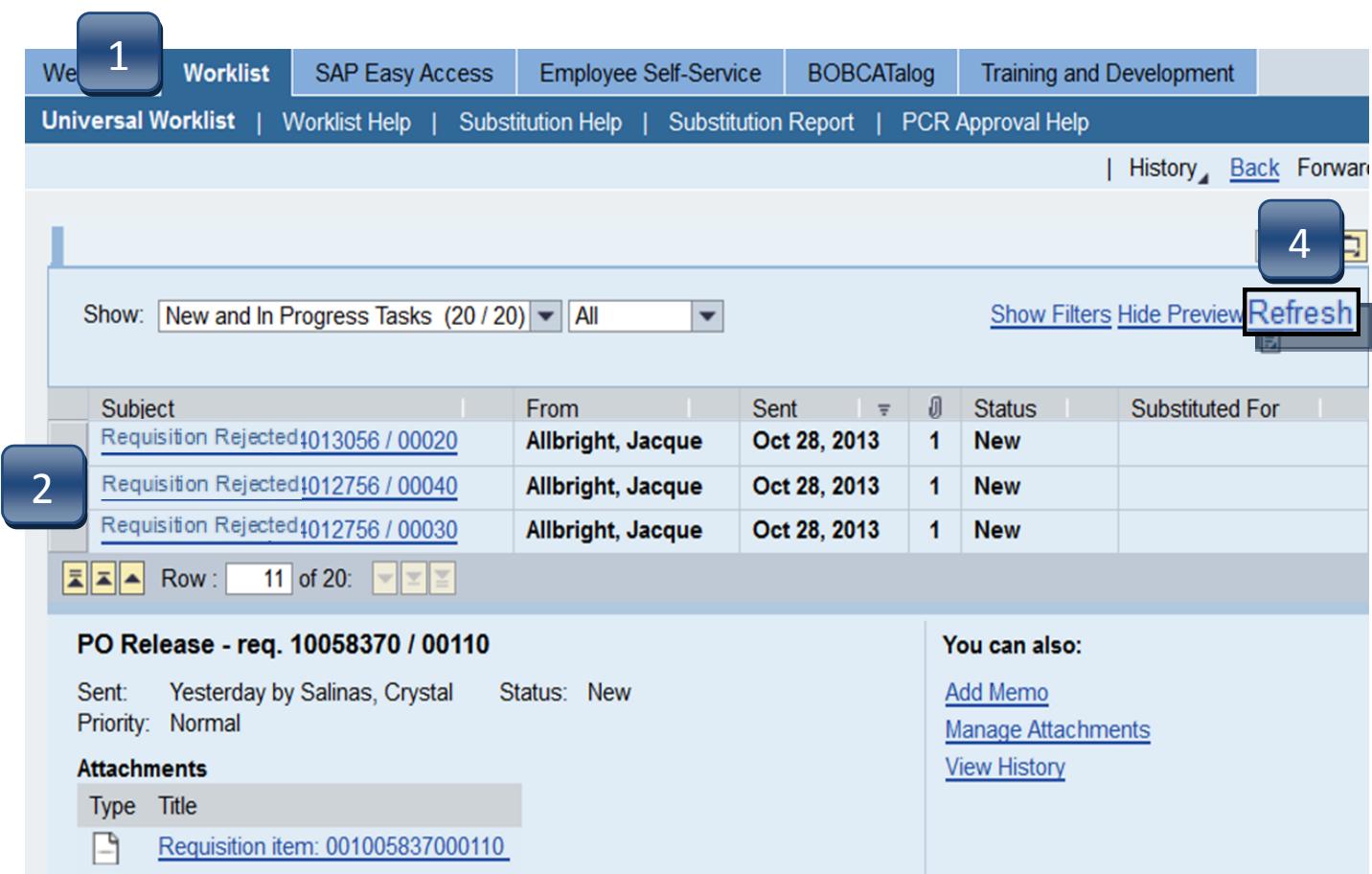


Upon rejection, the requisitioner will receive an e-mail notification as well as an immediate **Requisition Rejected** task in their worklist to resolve the rejection.

Correct a Rejected Requisition

STEP 1: Go into SAP Web portal and select the **Worklist** tab.

STEP 2: Select **Requisition Rejected** task to process. You will see the requisition number and line in the task description.



1 Worklist SAP Easy Access Employee Self-Service BOBCATalog Training and Development

Universal Worklist | Worklist Help | Substitution Help | Substitution Report | PCR Approval Help | History Back Forward

Show: New and In Progress Tasks (20 / 20) All Show Filters Hide Preview Refresh

Subject	From	Sent	Status	Substituted For
Requisition Rejected 013056 / 00020	Allbright, Jacque	Oct 28, 2013	1 New	
Requisition Rejected 012756 / 00040	Allbright, Jacque	Oct 28, 2013	1 New	
Requisition Rejected 012756 / 00030	Allbright, Jacque	Oct 28, 2013	1 New	

2 Row : 11 of 20:

PO Release - req. 10058370 / 00110

Sent: Yesterday by Salinas, Crystal Status: New
Priority: Normal

Attachments

Type	Title
Requisition item:	001005837000110

You can also:

[Add Memo](#)
[Manage Attachments](#)
[View History](#)

STEP 3: Follow **Correction** steps on next page.

STEP 4: Following task completion, click **Refresh** to see the task removed from your worklist.

Correct a Rejected Requisition

STEP 3 - CORRECTION STEPS:

To fix all items that caused requisition rejection:

- A. Click button to cancel the rejection.
- B. Follow message instructions in the **Header Notes**.
- C. Make changes as directed or delete line to cancel.
- D. Click **Save**. (Requisition will re-route to the Account Manager responsible for approval.)
- E. Click **Complete Work Item** in the pop-up window to complete this task and close. **Cancel** will retain the task.

The image consists of three screenshots of the SAP interface, each with a callout box labeled A, B, C, D, or E.

- Screenshot A:** Shows the SAP requisition header screen. A callout box labeled 'A' points to the 'Release indicator' field, which is set to 'Blocked'. A blue button labeled 'A' is overlaid on the 'Blocked' indicator.
- Screenshot B:** Shows the 'Texts' screen for the requisition. A callout box labeled 'B' points to a message box containing rejection notes. The message states: "Requisition approver will enter any comments here to identify reason for rejection." and "Framework dates/sufficient documentation not attached. Please correct, attaching appropriate documentation & providing dates of service." A blue button labeled 'B' is overlaid on the message box.
- Screenshot C:** Shows the SAP requisition details screen. A callout box labeled 'C' points to the 'Release group' field, which contains a red 'STOP' icon. A blue button labeled 'C' is overlaid on the 'STOP' icon.
- Screenshot D:** Shows the SAP header screen with a 'Save' button highlighted. A blue button labeled 'D' is overlaid on the 'Save' button.
- Screenshot E:** Shows a 'Requisition REJECTED' pop-up window. A callout box labeled 'E' points to the 'Complete Work Item' button. The window also contains a 'Description' section and an 'Objects and attachments' section. A blue button labeled 'E' is overlaid on the 'Complete Work Item' button.

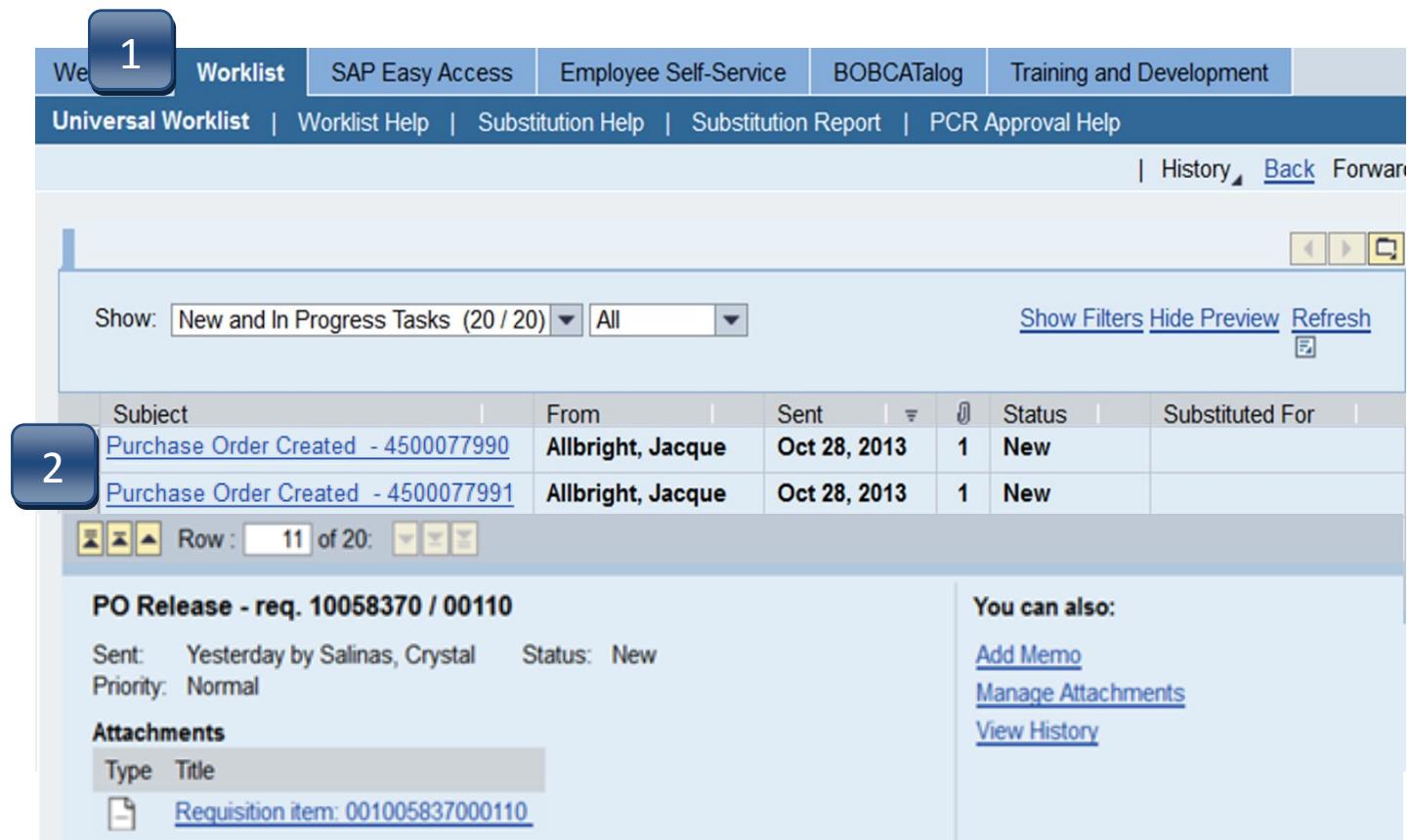
STEP 4: Following task completion, click **Refresh** to see the task removed from your worklist. (See previous page.)

Review and Print Purchase Orders

When a Purchase Order is created, a *Purchase Order Created* workflow task will route to the SAP Portal Worklist of the requisition creator. Requisition creators will be sent hourly e-mails to notify them that a New Workflow has been delivered to their worklist.

STEP 1: Go into SAP Web portal and select the **Worklist** tab.

STEP 2: Select **Purchase Order Created** task to process.



The screenshot shows the SAP Web portal Worklist interface. A blue box labeled '1' highlights the 'Worklist' tab in the top navigation bar. The main content area displays a list of tasks. A blue box labeled '2' highlights the first task in the list, which is a 'Purchase Order Created' task. The task details show it was sent to 'Allbright, Jacque' on 'Oct 28, 2013' with a status of 'New'. The task title is 'Purchase Order Created - 4500077990'. The interface includes a toolbar with icons for back, forward, and search, and a footer with links for history, back, and forward.

Subject	From	Sent	Status	Substituted For
Purchase Order Created - 4500077990	Allbright, Jacque	Oct 28, 2013	1 New	
Purchase Order Created - 4500077991	Allbright, Jacque	Oct 28, 2013	1 New	

PO Release - req. 10058370 / 00110

Sent: Yesterday by Salinas, Crystal Status: New
Priority: Normal

Attachments

Type	Title
	Requisition item: 001005837000110

You can also:

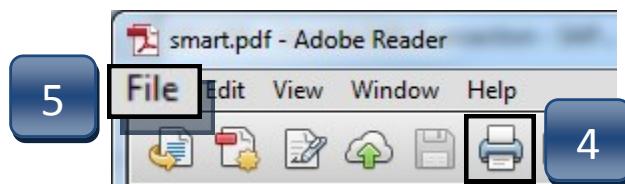
- [Add Memo](#)
- [Manage Attachments](#)
- [View History](#)

Review and Print Purchase Orders

STEP 3: Select **Print Preview**. Purchase Order will open in Adobe as PDF.



STEP 4: Review the purchase order and select **Print**. If any information is incorrect, please contact the Purchasing Office at **245-25121** or purchasing@txstate.edu.



STEP 5: Click **Save As** from the File menu to save a PDF copy to your computer for your records. Close PDF.

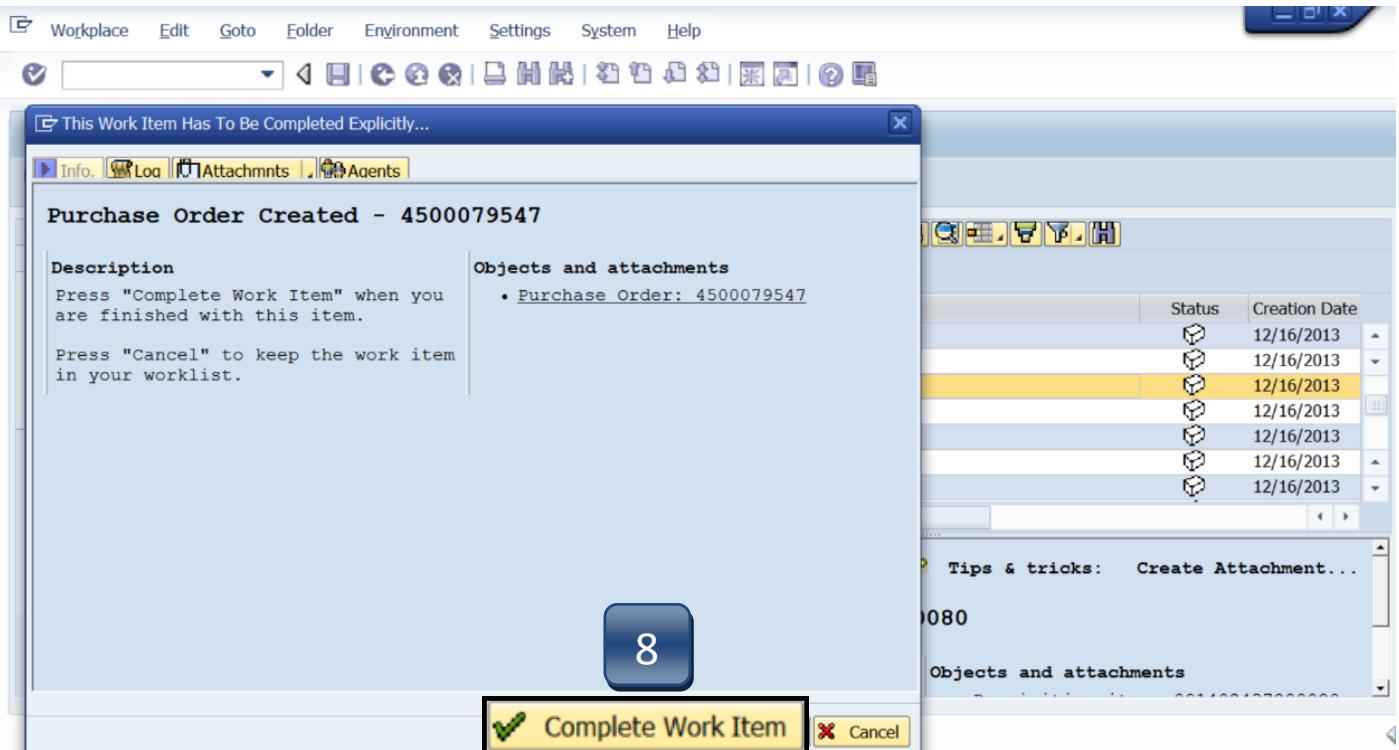
STEP 6: Select **Back** when finished to return to the prior screen.



STEP 7: Select **Back** again to return to the worklist.

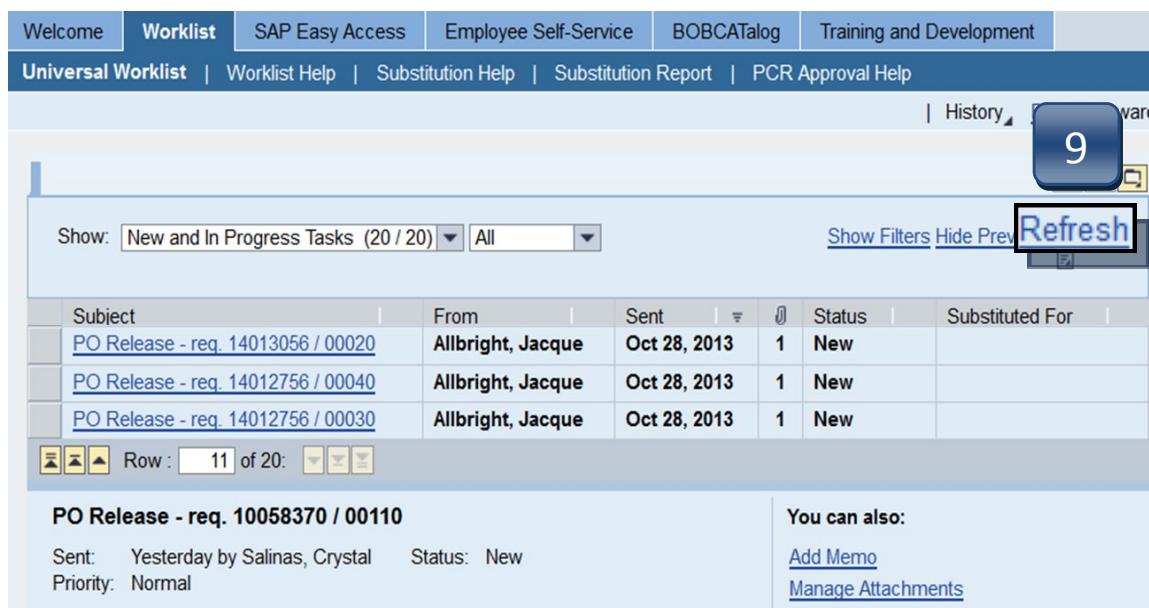


Review and Print Purchase Orders



STEP 8: Select **Complete Work Item** to complete this task, then **Close**.

STEP 9: Following task completion, click **Refresh** to see the task removed from your worklist.

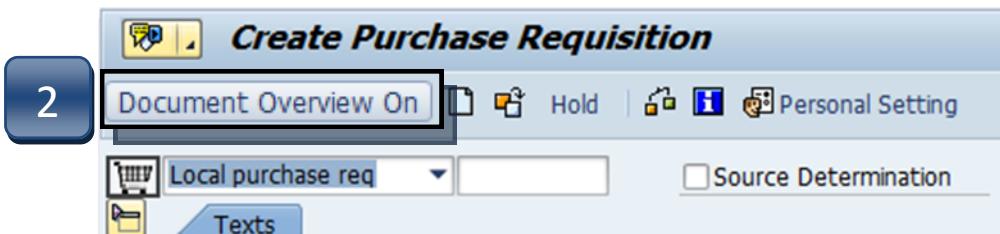


Copy a Requisition

STEP 1: Enter transaction code **ME51N** in main menu search field.
Hit **Enter** on your keyboard.



STEP 2: Select **Document Overview On**.

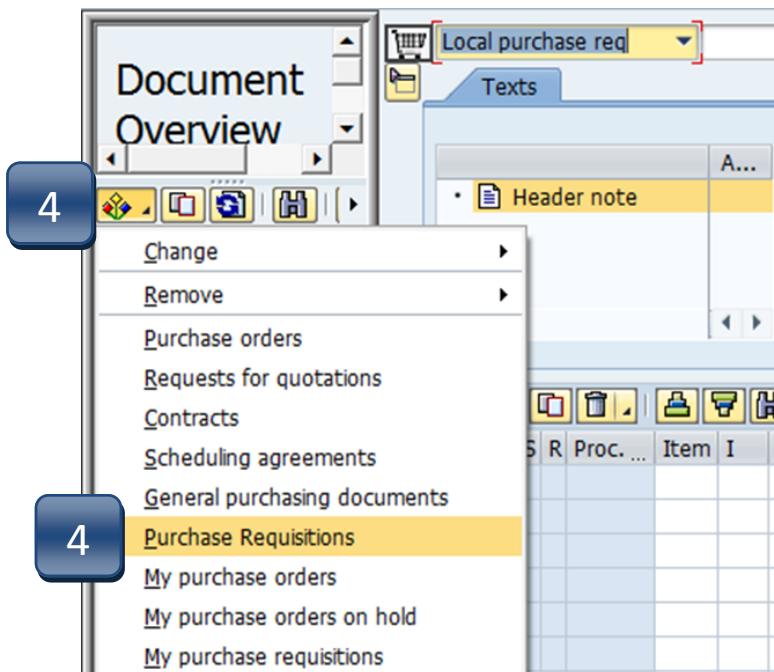


STEP 3: Click green check button.



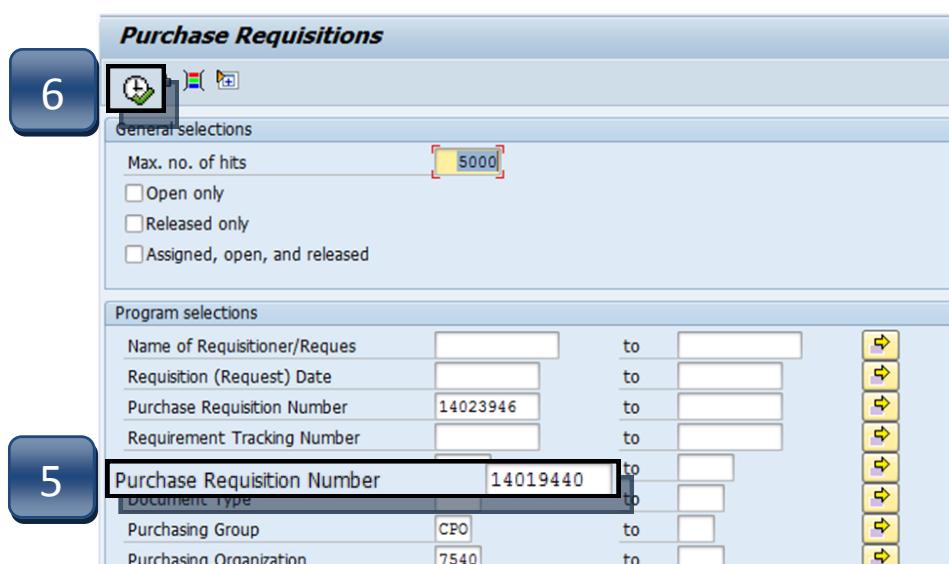
Copy a Requisition

STEP 4: Click **Selection Variant** (blue/yellow/red flower), then **Purchase Requisitions**.



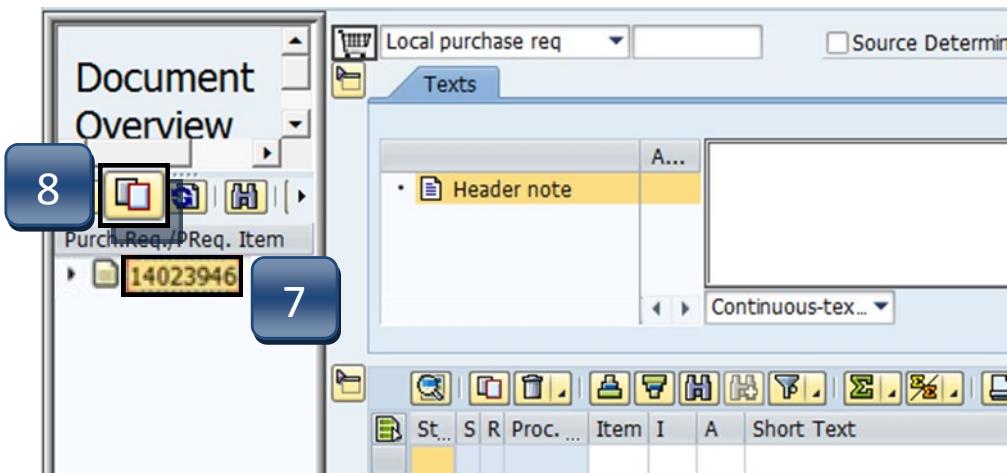
STEP 5: Enter requisition number to be copied in the **Purchase Requisition Number** field.

STEP 6: Click **Execute**.



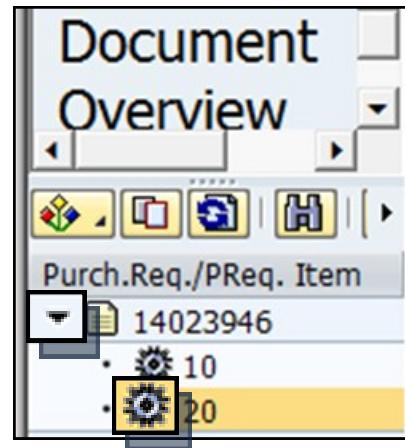
Copy a Requisition

STEP 7: Select requisition number in the Document Overview pane.



Tip
If the requisition to be copied contains **deleted** items, **DO NOT** copy them to the new requisition.

Select the active lines by clicking the black arrow pointing to the requisition number, then the black sun next to the line number, and proceed to **STEP 8**.



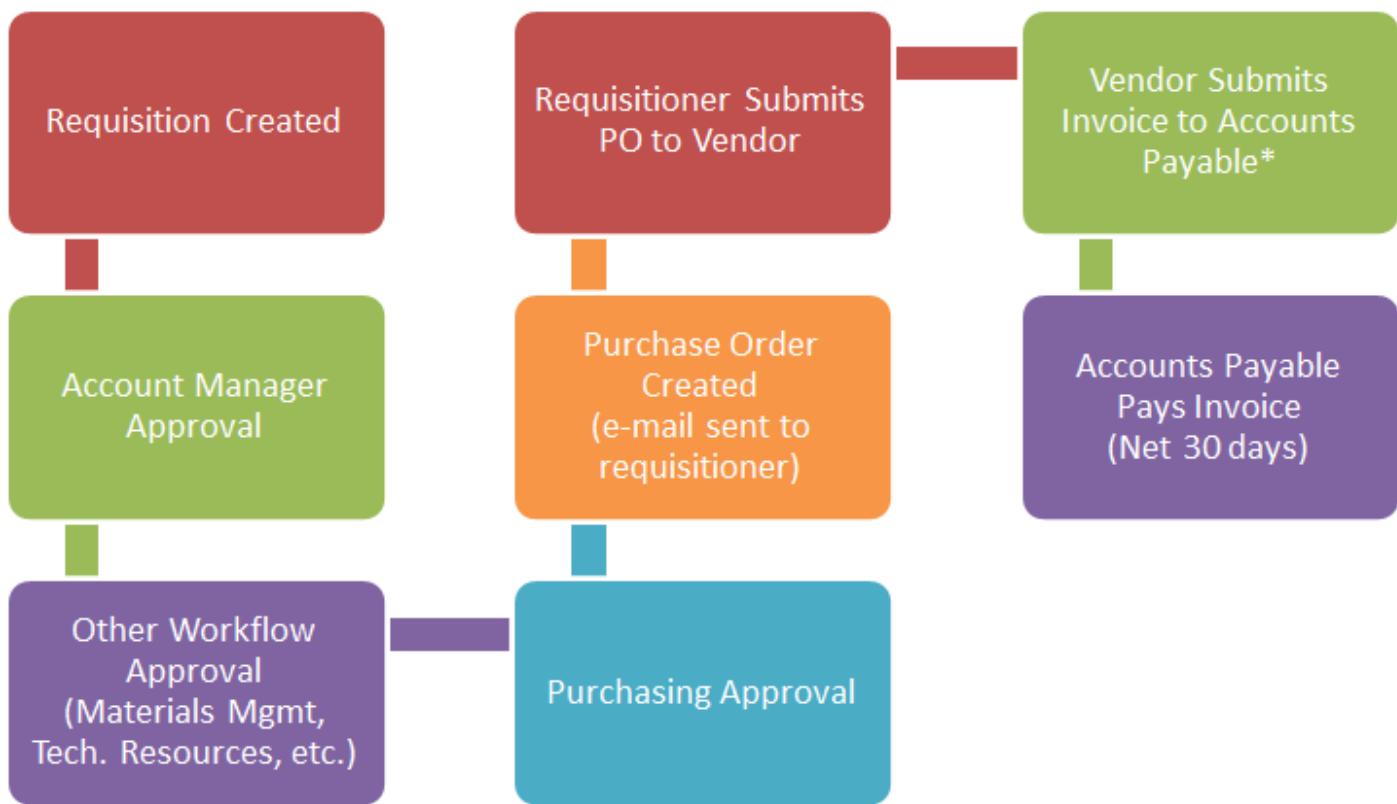
STEP 8: Click **Adopt**.

The copied requisition should now appear in the Create Purchase Requisition screen. Double-check entries to make sure everything is correct, and make any necessary changes. Review the account information, especially the fiscal year. **Header notes are not copied into the new requisition.**

STEP 9: Click **Save**. New requisition number will be generated in the lower left corner.

Requisition to Check Flowchart

Consult the flowchart below to view the full Requisition to Check process:



***Some vendors will send the invoice directly to the department. If you receive an invoice from a vendor, you are responsible for getting this invoice to Accounts Payable so the bill can be paid in a timely manner.**