

Create a Limit Framework Requisition

Limit Framework requisitions can be created in the TSUS Marketplace **for Non-Catalog SERVICES orders only.**

Step 1: Click on **Non-Catalog item.**

The screenshot displays the TSUS Marketplace interface. On the left is a blue navigation sidebar with links for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, Reporting, and Administer. The main header includes the TSUS logo and the text 'THE TEXAS STATE UNIVERSITY SYSTEM TSUS Marketplace'. Below the header is a search bar with a dropdown menu set to 'Everything' and a 'Go' button. A breadcrumb trail shows 'Shop > Shopping > Shopping Home > Home/Shop'. A 'Go to:' menu is visible with 'non-catalog item' highlighted in a red box and a blue callout bubble containing the number '1'. The main content area is divided into two sections: 'Science & Research' and 'Technology'. The 'Science & Research' section features logos for Fisher Scientific, SIGMA-ALDRICH, ThermoFisher Scientific, and Airgas. The 'Technology' section features logos for DELL, Xerox, BH, and GT Distributors, INC. Below the logos, there are brief descriptions of each supplier's services, such as 'Possible Missions-HUB', 'Science Lab Supplies', 'Dell/ Summus HUB', 'Printers-HUB', 'Photography Equip & Supplies', 'HUB', 'GraybaR', 'ANIXER', 'Apple', and 'GT Distributors, INC'.

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A pop-up screen will appear titled **Non-Catalog Item**.

Step 2: Enter Supplier- This is an active search field. Begin typing the name and the vendor will appear below. Select the vendor. If you do not see the vendor, contact purchasing to have the vendor **activated** for shopping. Once it has been activated, start from Step 2 and proceed forward.

Step 2A: Enter a description in **Product Description**.

Step 2B: Leave **Catalog No.** blank.

Step 2C: Enter one (1) in the **Quantity**.

Step 2D: Enter the amount to be paid for the first line in **Price Estimate**.

Step 2E: Select **EA** as an option under **Packaging**.

Step 2F: If you are adding another item select **Save and Add Another**.

Step 2G: If you are only ordering one item, click **Save and Close** when complete.

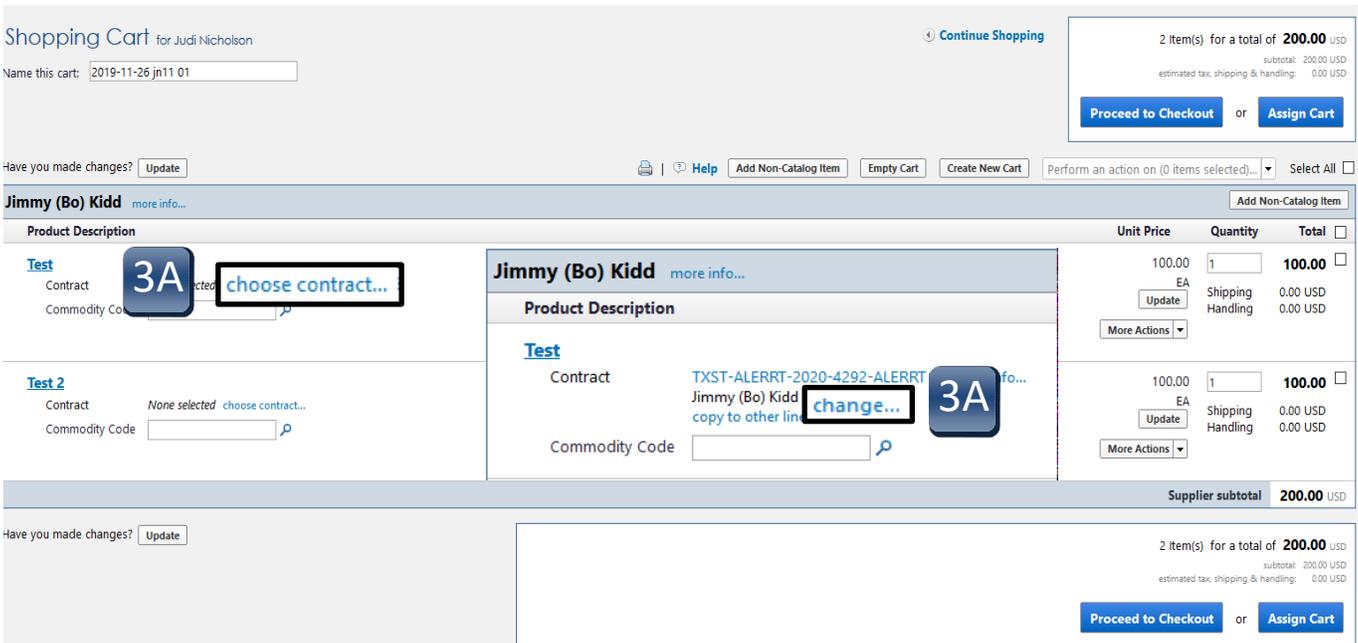
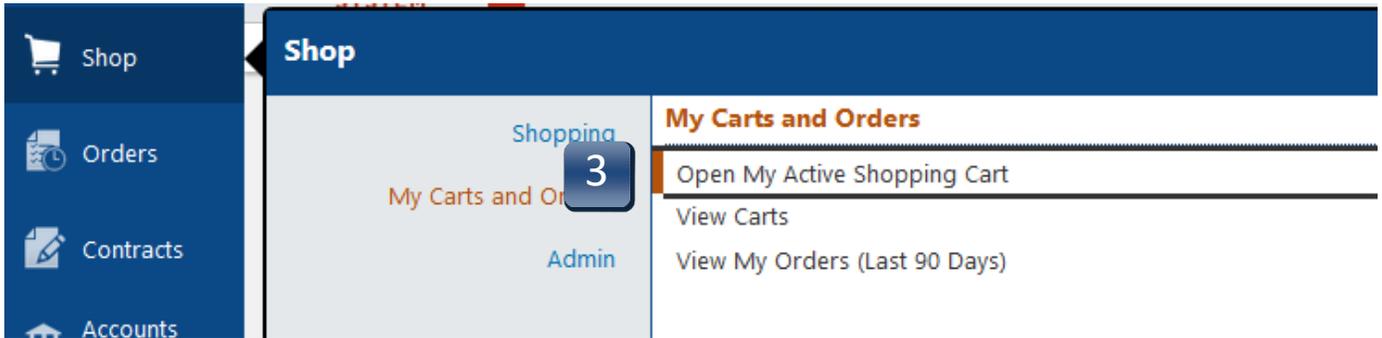
The screenshot shows the 'Non-Catalog Item' form with the following elements and callouts:

- Supplier:** JIMMY (BO) KIDD (Callout 2)
- Address:** 100 Brookhollow Dr, Wimberley, TX 78676-2503 US
- Product Description:** This is a test (Callout 2A)
- Catalog No.:** (Callout 2B)
- Quantity:** 1 (Callout 2C)
- Price Estimate:** 150.00 (Callout 2D)
- Packaging:** EA (Callout 2E)
- Product Details:** A list of checkboxes for various product attributes: Controlled substance, Recycled, Hazardous material, Radioactive, Rad Minor, Select Agent, Toxin, Energy Star, and Green.
- Buttons:** Save and Close (Callout 2F), Save and Add Another (Callout 2G), and Close.

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Step 3: On the left-hand menu ribbon, click on the **Shop** icon, then choose the **My Carts and Orders** option and choose the **Open My Active Shopping Cart** option. This will list all your active shopping carts. Choose the one from which you want to create a limit framework requisition.

Step 3A: Before clicking **Proceed to Checkout**, check to see if there is a contract associated with the entity. Click on **Choose Contract**. A screen will pop-up with possible matches. Make sure you select the correct contract if there is one and click on **OK**. If there is not a contract, select **No Contract** and click on **OK**. If you have selected an incorrect contract, you can click on **Change Contract** to make changes. Do this for each line.



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Step 3B: At the next screen click on **Proceed to Checkout**.

Step 4: The **Header Accounting Code** section, as shown below, applies to every line. If you need different accounting codes on different lines, then you must change each line's accounting codes on the requisition. Only lines that **differ** from the Header Accounting Code section will need to be changed. Enter in the information in all the **Required Field** areas making sure that the correct account combination is entered; and then click **Save**. Click on the **Edit** button to the right of each accounting code lines.

Shopping Cart for Judi Nicholson

Name this cart: 2019-11-26 jn11 01

Continue Shopping

2 Item(s) for a total of **200.00** USD
 subtotal: 200.00 USD
 estimated tax, shipping & handling: 0.00 USD

3B Proceed to Checkout or Assign Cart

Have you made changes?

Help Add Non-Catalog Item Empty Cart Create New Cart Perform an action on (0 items selected)... Select All

Jimmy (Bo) Kidd more info... Add Non-Catalog Item

| Product Description | Unit Price | Quantity | Total |
|---|------------------------|---------------------------|--------------------------------|
| Test Contract TXST-ALERRT-2020-4292-ALERRT more info... Jimmy (Bo) Kidd change... copy to other lines... Commodity Code <input type="text"/> | 100.00 EA Update | 1 Shipping Handling | 100.00 0.00 USD 0.00 USD |
| Test 2 Contract None selected choose contract... Commodity Code <input type="text"/> | 100.00 EA Update | 1 Shipping Handling | 100.00 0.00 USD 0.00 USD |

Supplier subtotal **200.00** USD

Have you made changes?

2 Item(s) for a total of **200.00** USD
 subtotal: 200.00 USD
 estimated tax, shipping & handling: 0.00 USD

3B Proceed to Checkout or Assign Cart

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Final Review

Place Order Assign Cart

Return to shopping cart Continue Shopping

Almost ready to go! The list below needs to be addressed before the request can be submitted.

- Required field: Account Assignment Category
- Required field: Fund
- Required field: G/L Account
- Required field: Storage Location

Requisition PR Approvals PO Preview Comments Attachments History

Summary Shipping Billing Accounting Codes Supplier Info Taxes/S&H

Hide value description

Accounting Codes

These values apply to all lines unless specified by line item

| Account Assignment Category | Storage Location |
|-------------------------------------|-------------------------------------|
| <input type="text"/> Required field | <input type="text"/> Required field |

| Purchasing Group | PO Type | Limit | Expected Value | Overall Limit | Valid Start Date (Enter MMDDYYYY) | Valid End Date (Enter MMDDYYYY) |
|---------------------------|------------------|----------|----------------|---------------|-----------------------------------|---------------------------------|
| CPO | BC | no value | no value | no value | no value | no value |
| Central Purchasing Office | Bobcatalog Local | | | | | |

| Fund | Cost Center | Internal Order | WBS Element | G/L Account | Asset | Asset Sub-Number |
|-------------------------------------|-------------|----------------|-------------|-------------------------------------|----------|------------------|
| <input type="text"/> Required field | no value | no value | no value | <input type="text"/> Required field | no value | no value |

4 Edit Edit Edit

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Step 5: To setup the Limit Framework, select **edit** on the second line in the **Header Accounting Codes** section and enter the following:

1. Select the correct **Purchasing Group**; CPO for most of the campus.
2. Change the **PO Type** to **BCF**;
3. Under **Limit** Select **B**.
4. Leave **Expected Value** and **Overall Limit** blank.
5. Enter a valid start date and end date for the Framework.
6. Click **Save** after all data in the **Header Accounting Codes** is entered correctly.

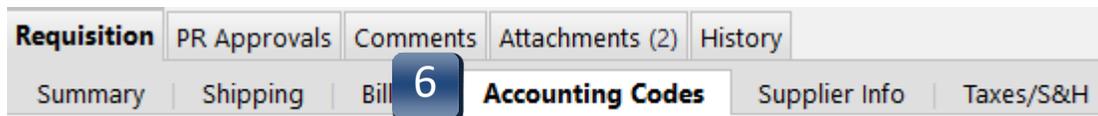
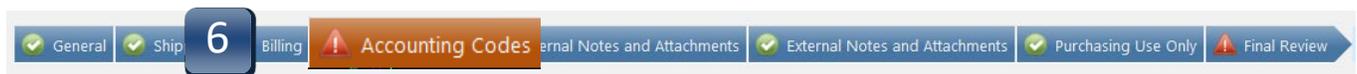
*****It is critical that the dates are entered as shown in the example MMDDYYYY. The framework order will fail and not post into SAP if entered incorrectly.*****

The screenshots illustrate the configuration steps for a Limit Framework Requisition in SAP:

- Information 1:** Shows the 'Account Assignment Category' field set to 'K' and 'Storage Location' set to 'JCKP'. Both fields are marked as required.
- Information 2:** Shows the 'Purchasing Group' set to 'CPO', 'PO Type' set to 'BCF', and 'Limit' set to 'B'. The 'Valid Start Date' is '05102018' and the 'Valid End Date' is '06012018'. Both dates are in MMDDYYYY format.
- Codes:** Shows the 'Fund' set to '2000011019' and 'G/L Account' set to '726600'. Both are marked as required.
- Other Information 2:** Shows the final configuration with callouts 1 through 5 pointing to the 'Purchasing Group', 'PO Type', 'Limit', 'Expected Value', and 'Valid Start Date' fields respectively. The 'Valid End Date' is also highlighted with callout 5.

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- Step 6:** To set the **Expected Value** and **Overall Limit** for each line, make sure the **Accounting Codes** tab is selected; scroll down to the **Product Description** section.
- Step 6A:** For line 1, click on the **edit** button to the right of **Other Information 2 (same as header)** line. A pop-up screen will appear that will allow you to enter the **Expected Value** and the **Overall Value**. When you have finished, click on the **Save** button. Make sure that for each line, you click **edit** and enter the **Expected Value** and the **Overall Value**, clicking on the **Save** button after each entry.
- Step 7:** If you need to attach any internal or external notes and or attachment, proceed to those tabs. Once the notes and attachments sections are complete or you do not have any, proceed to the **Final Review** tab. (See Completing the Checkout Process – Internal and External Notes and Attachments)



| Product Description | Catalog No | Size / Packaging | Unit Price | Quantity | Ext. Price |
|---|------------|------------------|------------|----------|------------|
| 1 Test more info... | | EA | 100.00 | 1 EA | 100.00 USD |
| Other Information (same as header) edit | | | | | |
| Other Information 2 (same as header) 6A Edit | | | | | |

Other Information 2 ? X

| Purchasing Group | PO Type | Limit | Expected Value | Overall Limit | Valid Start Date (Enter MMDDYYYY) | Valid End Date (Enter MMDDYYYY) |
|----------------------------------|-----------------------------------|----------------------------------|----------------------------------|----------------------------------|-----------------------------------|---------------------------------|
| CPO Central Purchasing Office | BCF Bobcatalog Framework Order | <input type="text" value="100"/> | <input type="text" value="100"/> | <input type="text" value="100"/> | 05182018 | 06012018 |

6A Save Cancel



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Step 8: On the **Final Review** it will be noted if you have completed all the required fields. If you have not, you will need to complete them before you can place the order or assign the cart. There may be a note stating that there is an error, but it will not prevent you from placing the order or assigning the cart. Review the **Accounting Code** section to ensure the correct values are entered for the framework values and the account assignment values. Click on **Place Order** or **Assign Cart** as applicable. If not a requisitioner, only the **Assign Cart** option will be available. Once the cart is placed into order, the requisition will go through the standard workflow for approvals. After approvals, the order is sent to the vendor and imported into SAP. Login into SAP and view the framework order.

General Shipping Billing Accounting Codes Internal Notes and Attachments External Notes and Attachments Purchasing Use Only Final Review

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Place Order

Assign Cart

Return to site

All done! The required information has been completed and this request is ready to be submitted.

Once you have reviewed the details, you may continue by clicking the button at the top of the page.

You need to be aware of the following issue(s), but it will not prevent you from submitting your request.

- Empty field: Description