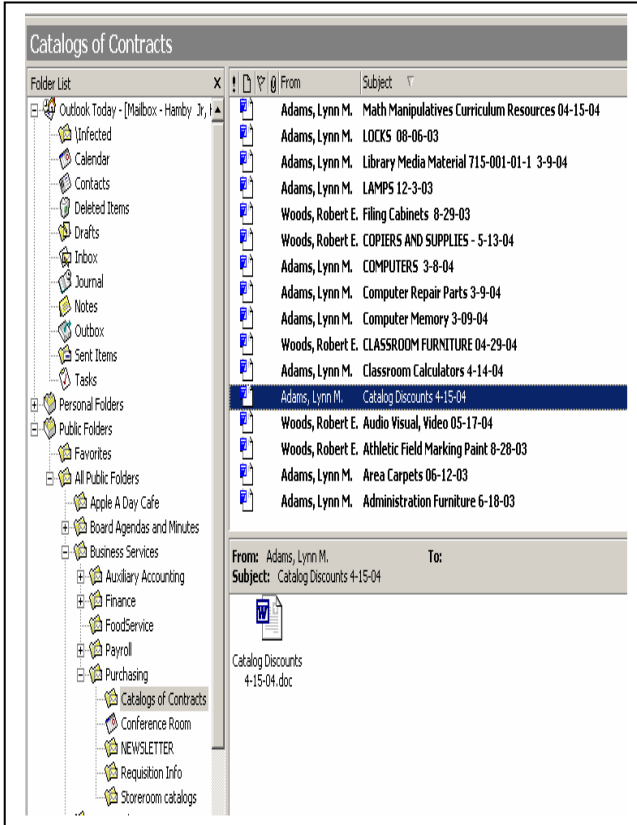


Create Purchase Requisition with Contract Discount

Steps	Screen Displayed	Procedures
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1



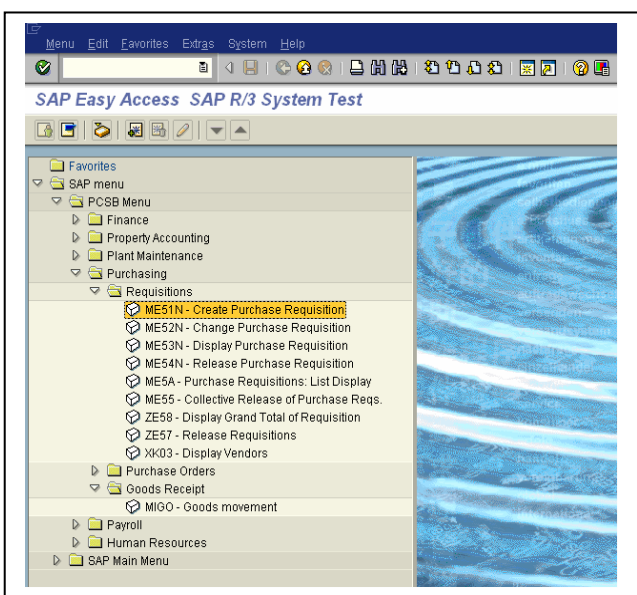
Read Before You Begin:

Before you begin a Contract Requisition you must have the information from the Contract Catalog.

If you do not have the information – **STOP** and print out the Contract Information from the Contract Catalog located in:
Outlook > Public Folders > All Public Folders > Business Services > Purchasing > Catalog of Contracts.

*Double-click the **Name of the Contract** for the type of item(s) you are ordering, and print it out.*

2



SAP Easy Access PCSB Menu

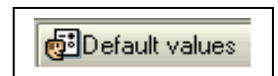
- Type **ME51N** in the command box
 - Press **Enter**
- or-
- Click the **Expand** icon to the left of **PCSB Menu > Purchasing > Requisition, Double-click Create Purchase Requisition**

NOTE:

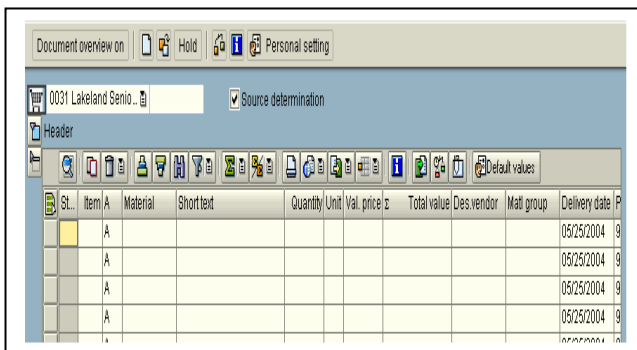
Refer to the Initial Setup of Purchase Requisition Default value screen.doc located in Outlook Public folders for the initial default screen setup.

Create Purchase Requisition

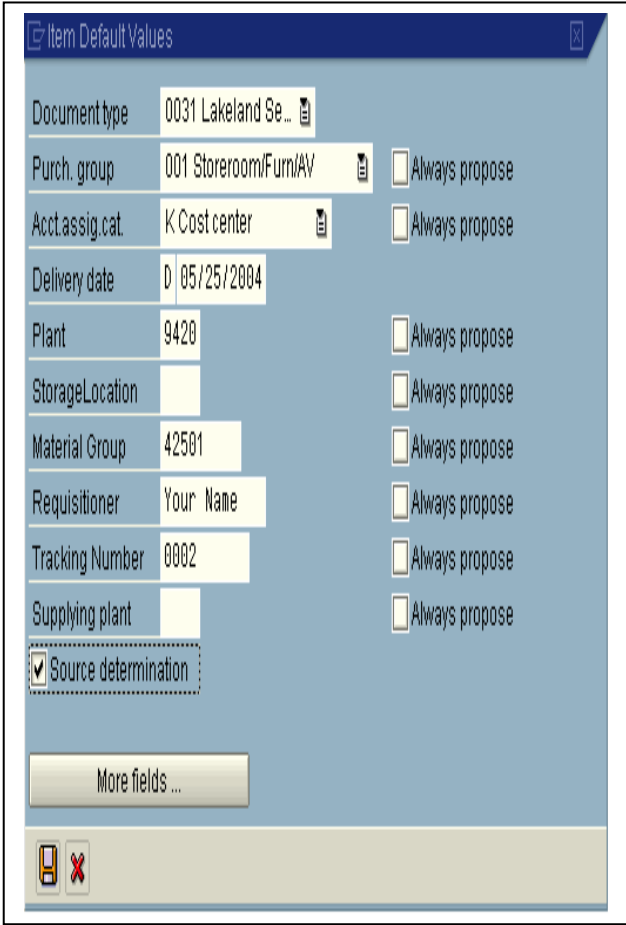

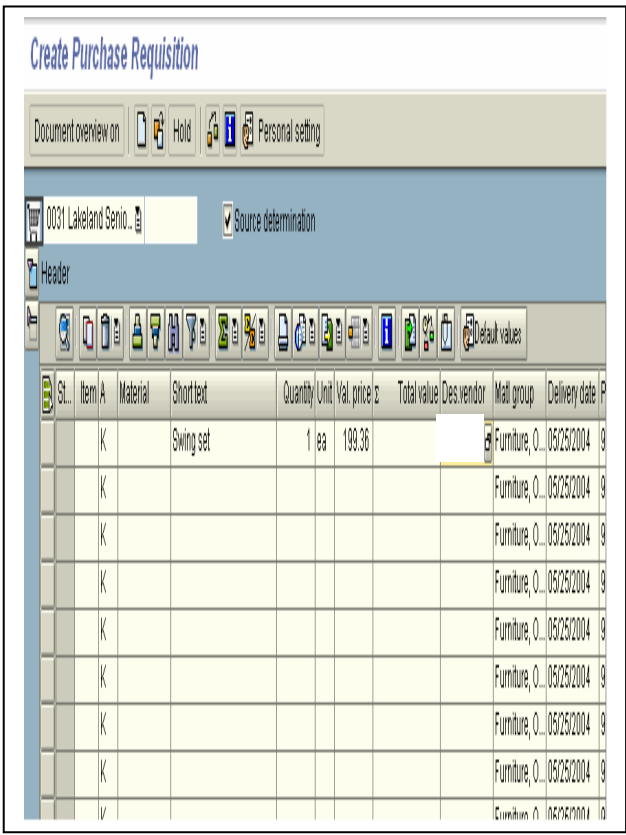
- Click the **Default values** button



The Default values serve the same function as the Create Purchase Requisition Initial screen in SAP v4.5.



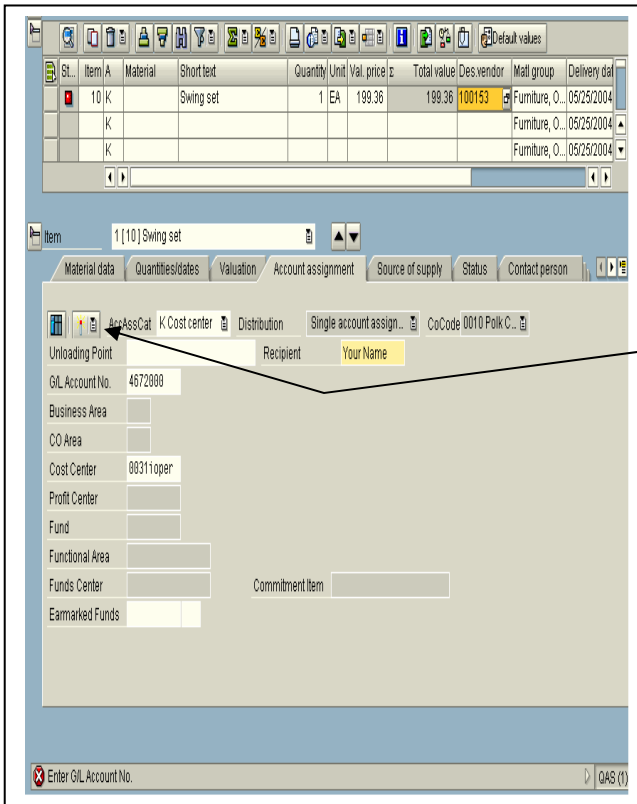
Create Purchase Requisition with Contract Discount

Steps	Screen Displayed	Procedures
3		<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">  </div> <ul style="list-style-type: none"> • <i>Type</i> your School or Department number in Document type field • <i>Type</i> the Purchasing group or <i>click</i> the search icon and <i>click</i> the group in the drop down list • <i>Type</i> “K” for Cost center, “A” for Asset (items over 750.00 each) in Acct. assig. cat. field • <i>Type</i> or <i>select</i> the Date using the Search help icon based on the Contract terms in Delivery date field • <i>Type</i> 9420 in the Plant field • <i>Type</i> the Material group or select using search help icon • <i>Type</i> Your name for “K” Cost center type orders, <i>type</i> the Cost center used to purchase the Asset for “A”- Asset type orders in the Requisitioner field • <i>Type</i> a Tracking Number (optional) • <i>Click</i> the Check box for Source determination (will always be checked) • <i>Click</i> the Save icon
4		<p><u>Important!</u> Follow these steps in order: If your entering multiple line items with the same Cost center, enter the first line following the steps as described.</p> <ul style="list-style-type: none"> • <i>Type</i> Description of the item you wish to order. Always put the item name first, followed by a short description • <i>Type</i> Quantity requested • <i>Type</i> Unit of Measure • <i>Type</i> the Price as specified in the Catalog of Contracts documentation in the Val. price field • <i>Leave</i> the Vendor number blank unless the Catalog of Contracts documentation states otherwise • <i>Press</i> Enter or <i>Click</i> the Green check

Create Purchase Requisition with Contract Discount

Steps	Screen Displayed	Procedures
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5



Account assignment

Important!

Follow these steps in order:

Account assignment for "K" Cost Center

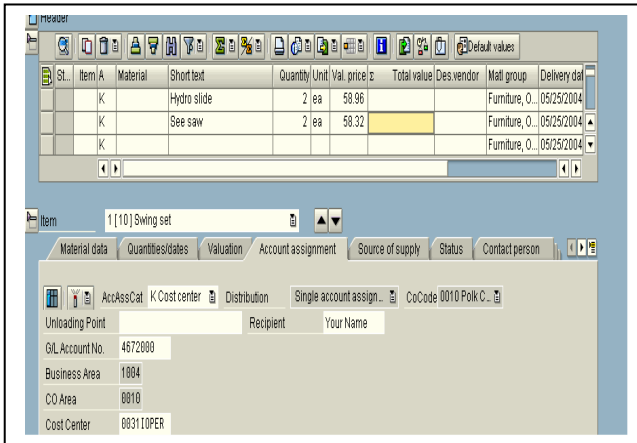
- Type the **GL Account Number**
- Type the **Cost Center**
- Type the **Recipient** (the name of person receiving item(s))
- Click the **Repeat on** icon (this performs the same function as **Repeat acc. ass. on** button in SAP v4.5b)



For the GL and Cost center to use refer to *Expenditure Guide SAP Budget Accounts.doc* located in Outlook Public folders.

- Press **Enter** or click the **Green check**

6

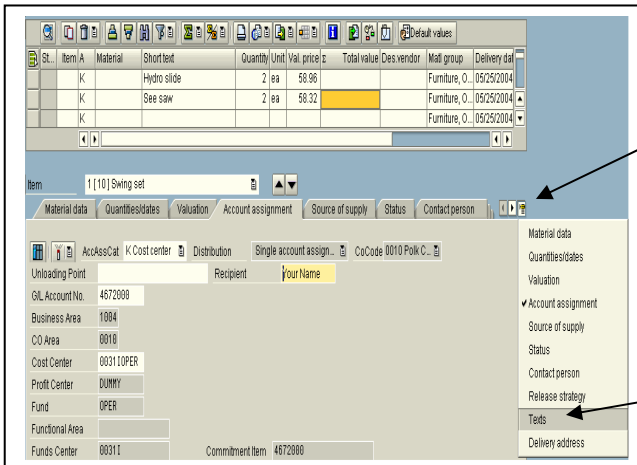


To order additional line items follow these directions.

- Click in the **Short text** column in next available row and enter short text
- Type the **Quantity** requested
- Type the **Unit of Measure**
- Type the **price per unit** in the **Val. price** column

Continue these steps until you enter all requested items.

- Press **Enter** or click the **Green check**



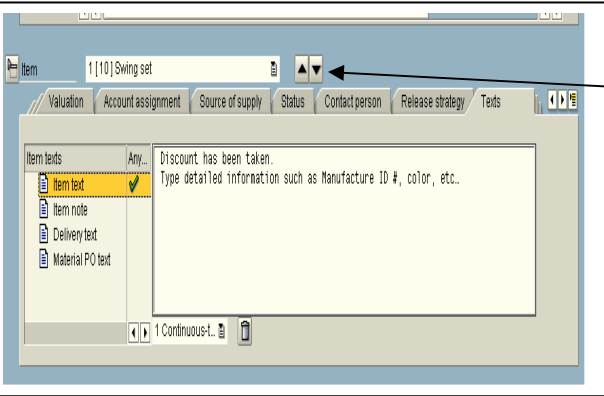
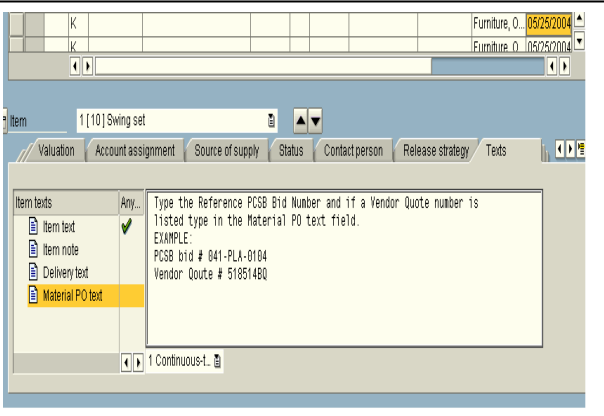

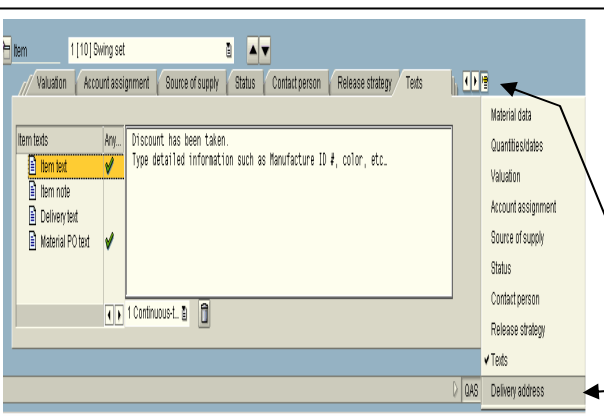
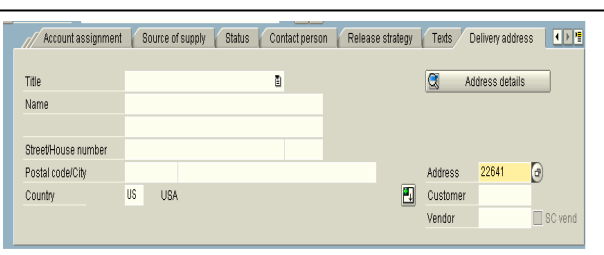


Texts

- Click the **List box** icon to add text to a line item

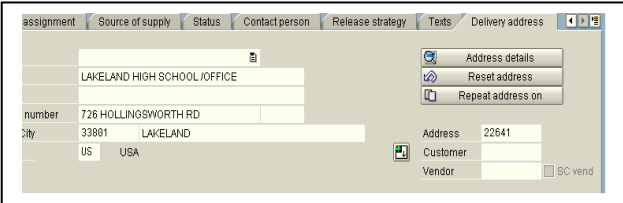
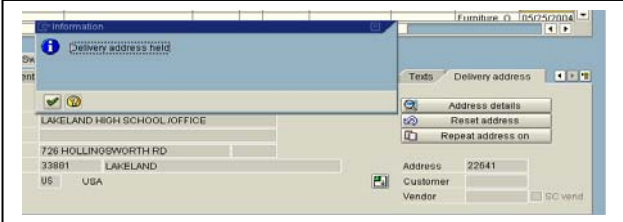

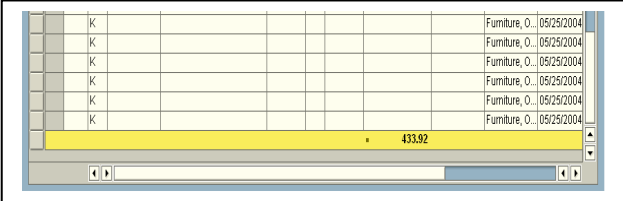
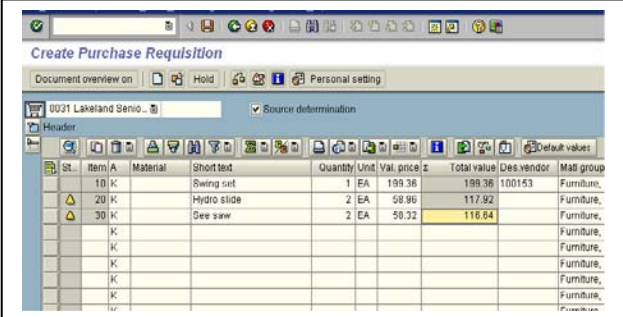
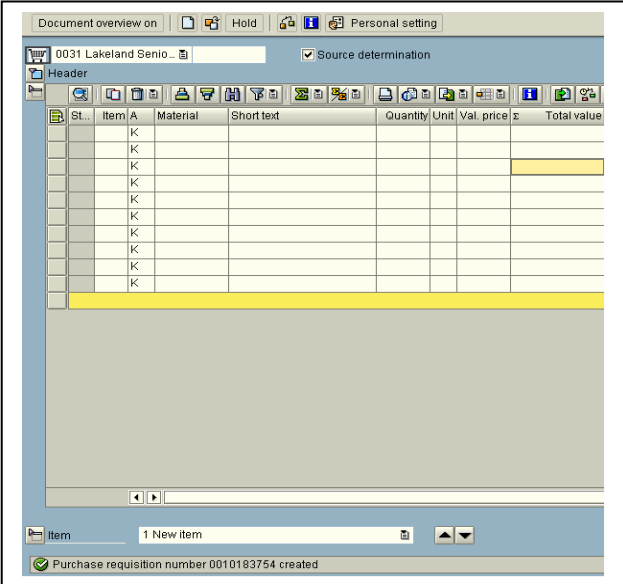


- Click **Texts**

Create Purchase Requisition with Contract Discount

Steps	Screen Displayed	Procedures
7	 	<div data-bbox="917 149 1516 201" style="border: 1px solid black; padding: 2px;">Texts</div> <ul style="list-style-type: none"> Click the List box icon or the up, down arrow to select the line item to add the text <div data-bbox="1154 285 1419 365" style="border: 1px solid black; padding: 5px; margin: 5px 0;">  </div> Type Discount has been taken (if Catalog of Contracts documentation specifies this step) in the Item text for each line item and any other pertinent information <p>The following step is only required for the first line item of the requisition</p> <ul style="list-style-type: none"> Click Material PO text, then Click in the box Type the Reference PCSB Bid Number and if a Vendor Quote number is listed in the Material PO text field
8	  	<div data-bbox="917 995 1516 1056" style="border: 1px solid black; padding: 2px;">Delivery address</div> <p>NOTE: Enterprise v4.7 is designed for use with the screen resolution set at 1024 x 768. If you aren't using those settings you will have to use scroll bars located on the right side and bottom of your screens.</p> <ul style="list-style-type: none"> Click the List box icon <div data-bbox="1321 1287 1419 1350" style="border: 1px solid black; padding: 5px; margin: 5px 0;">  </div> Click Delivery address Type your Delivery address number in the Address field or click the Search help icon (Depending on your screen resolution you may need to scroll using the scroll bars on the bottom and right of your screen) Press Enter or Click the Green check Click the Yes button

Create Purchase Requisition with Contract Discount

Steps	Screen Displayed	Procedures
9	   	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; text-align: center;"> Delivery address </div> <ul style="list-style-type: none"> Click Repeat address on Click the Green check or Press Enter to acknowledge this Information box <p>FYI: Enterprise v4.7 has a new feature, which displays Total cost per line item and displays the Grand total, scroll down to display the grand total.</p>
10	 	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px; text-align: center;"> Create Purchase Requisition </div> <ul style="list-style-type: none"> Click the Save icon <p>The system saves the Requisition, generates a Requisition number, and returns you to a blank Requisition page with the Requisition number displayed on the lower left status bar.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px; text-align: center;"> Purchase requisition number 0010183754 created </div>