Creating a Requisition for Services (ME51N) - FULL INSTRUCTIONS

Requisitions for services should be entered into the on-line SAP Finance System using transaction **ME51N** for all items that fall under the category of services (guest lecturers, consultants, contracted maintenance, rentals, etc.). <u>These Purchase Requisitions should be entered 2-3 weeks prior to the start of services. Do not wait until you have an invoice before you enter your requisition.</u>

Item Overview

Note: Items that are marked with an "*" are defaulted from your Personal Settings. The information that you need to enter is:

*Account assignment - the variables to choose from are:

> K - Cost Center
> G – Grant
> P - Project
> F – Order (Your Cost Center is broken down into Internal Order numbers)
> X – Mixed coding (a Cost Center and a WBS Element)

Item Category – Type "D" for service.

Matl group (material group) – All service requisitions will have the Material Group 109000 (professional services).

Short text – Type a brief description of the service to be provided (e.g. honorarium, consulting services, maintenance/support, etc).

Quantity/Unit of measure/Valuation Price – Leave these areas blank, they will be filled in from the information you provide in the **Services** tab in Item Detail.

Delivery Date – Type in the date the service is expected to begin. You can also use the **Display Matchcode List** icon to display a calendar, double-click the date to make your choice.   **This date controls the fiscal year of the funds.**

Des. Vendor – Type in vendor ID (beginning with "1") that was obtained from ZM08.

POrg – (Purchasing Organization) Type in **LOCL**.

*PGr – (Purchasing Group) Defaults to 600 which is the main Purchasing Group for Millersville University. This should not be changed.

*Plant – Defaults to 60.

Once you have entered all the fields above press enter. A red bomb will appear in the **Status** field and the system will take you directly to the **Services** tab in **Item Detail**.

Item Detail

The information in this area is the itemized detail for the line you just completed in the Item Overview area.

If you are not already there, click the **Services** tab to provide the following information:

Short text – Short detail of the service, activity, or work.

Quantity – Type the desired quantity for the designated Unit of Measure.

Unit of Measure – Type the desired unit of measure or hit the **Display Matchcode List** icon to display the complete list of variables and make your choice.

Gross price – Type in the gross price for the designated **Unit of Measure**, do not include dollar signs ($) or commas as the system is only looking for numbers, decimals are acceptable.

For example – a speaker fee can be entered as 1 "lot" @ $1 0 Tc -0.0024 Tw 20nformation:

Cost Center – This is the assigned number that describes your department. The variables in this section will change depending on what you entered in the **Category** field of the **Item Overview** section:

> =If you entered K – Cost Center, complete the Cost Center field
> =If you entered G – Grant, complete the WBS Element field
> =If you entered P – Project, complete the WBS Element field
> =If you entered F – Order, complete the Cost Center and the Order field
> =If you entered X – Mixed coding, which is when you split the cost of the item between a Cost Center, a WBS Element, and/or a Project.   Complete the fields as described below:
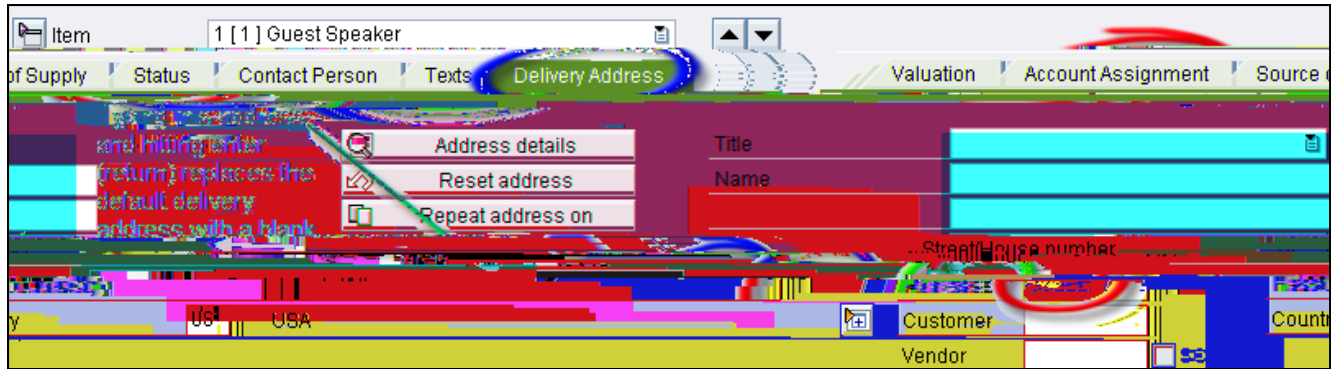
After you hit enter you will see the following pop-up screen:

When you have entered all the accounting information, click the green back button (or F3) to return to the

Click the **Delivery address** tab – In most cases for services you will type 223857 (no campus delivery) in the **Address** field and click enter (return) to delete the default delivery address (Receiving/Palmer).

If you look at the **Purchase requisition** field near to the top of the screen the document number is not yet assigned. If you shut down SAP or your computer shuts down for any reason the information you had entered will be lost!

When you have entered all information regarding your **Purchase requisition** click the **Save** icon, if there are entry errors you will see a red bomb, if you click on the bomb you will get a description of the error that must be corrected in order to complete the requisition.

3   Click the **Save** icon when you are sure the information is entered accurately.

3   To save the information on your Purchase requisition but not send it on for processing, click the **Hold** icon.

You will get your **Purchase requisition** number either in a pop-up box or at the bottom of your screen in the grey area.

Write your Purchase requisition number down, it is your responsibility to remember to take the hold off the document so that it can be processed. Purchase requisitions that are on hold do not appear in the Release Strategies (approvals) and will not be forwarded to the purchasing staff for processing.

Removing the Hold from your Requisition:

To take the hold off your requisition, go to **ME52N Change Purch. Requisition. I**f the held requisition is not displayed, click the **Other Requisition** icon and in the pop-up box type the held requisition number, then click the **Other document** icon. The Purchase requisition is displayed as "held". If the fields are not accessible click the **Display/Change** icon, you are now in edit mode and changes can be made to the document, if necessary.

Once you are sure you want to take the hold off your **Purchase requisition,** click the **Save** icon.

You will now get a message that your