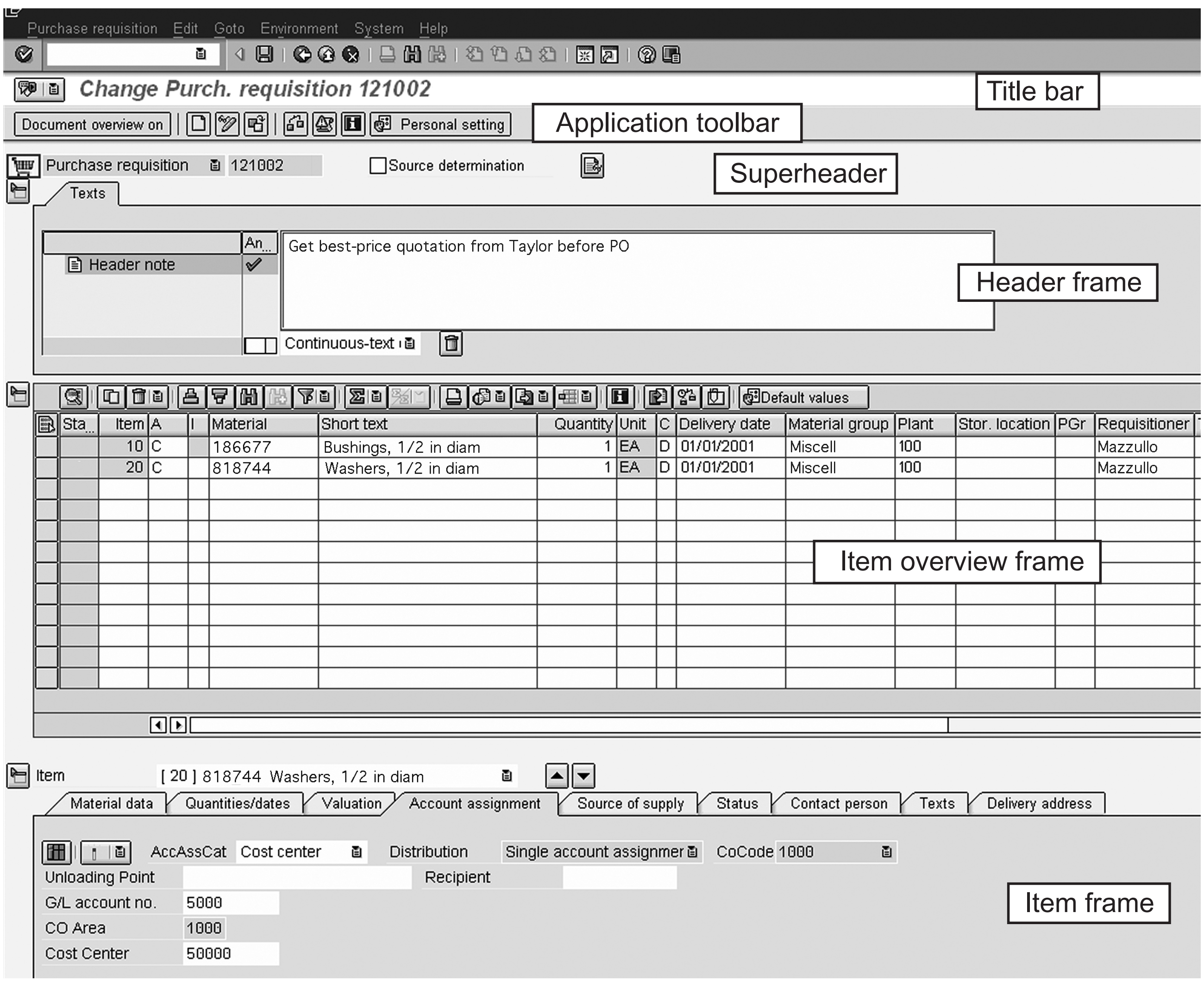
Preface

Purchase Requisition Screen: Design and Operation

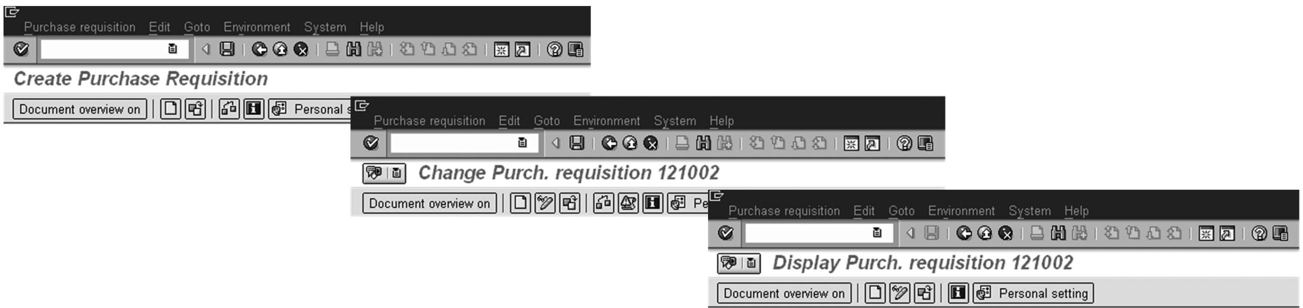
Introduction

This *SAP Purchase Requisitions manual* provides detailed instructions on creating, changing and displaying purchase requisitions with transactions ME51N, ME52N and ME53N. This preface describes the design and general operation of the screens of these transactions, and specifically their most distinctive elements, which are labeled in the following screen image.



Title bar

The **title bar** of a purchasing screen displays the transaction type* - that is, whether it is a screen for creating, changing or displaying a requisition . The title bars of change and display screens also indicate the requisition number being changed or displayed.



Application toolbar

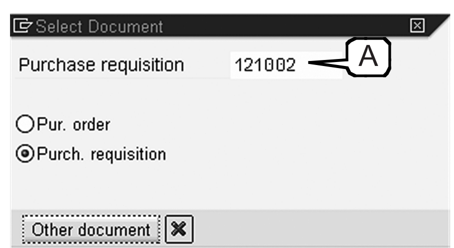
The **application toolbar** contains several buttons that are especially useful:

1. **Document overview on** [Document overview on] **button** calls up a frame on the left side of the screen where other requisition numbers are displayed. You can select another requisition to change or display by double-clicking that number. When this frame *is* displayed, the button name changes to *Document overview off*.
2. **Create** **button** starts the process of creating a new requisition.
3. **Display/Change** **button** changes a purchasing screen from display mode to change mode or vice versa.
4. **Other requisition/order** **button** also enables you to select another existing requisition to change or display. When you navigate to the screens of change and display transactions, the system calls up by default the record of the last requisition that you worked on. To change to another:

   ¥ Click the **Other requisition/order** **button**.

   ¥ The **Other requisition/order screen** appears. Enter a requisition number in the **Purchase requisition/ field** (A), then hit the **Enter key** on your keyboard.

   ¥ SAP calls up the requested requisition.



5. **Personal settings** [Personal setting] **button** enables you to customize the layout of the **Item Overview frame** and create default entries for some of its fields.

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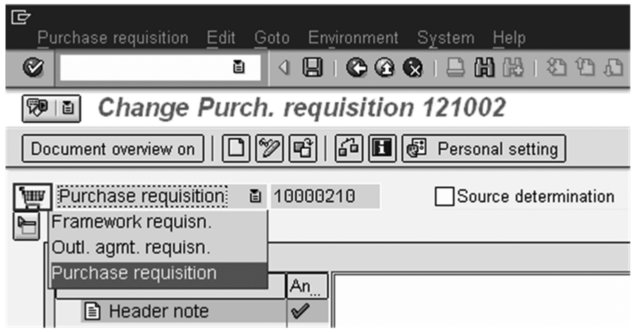
*See the Coda at the end of *SAP R/3 for Everyone* for a discussion of the basic transaction types.

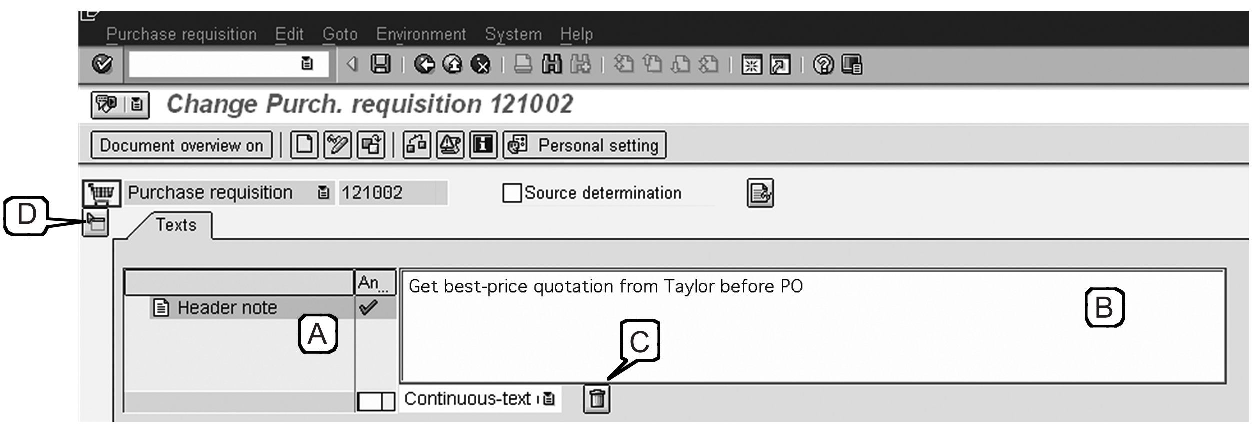
Superheader

The **superheader** contains one important element: the **Object type field** (A), where you can select a requisition type. The purchase requisition number is again displayed to the right of this field on the change and display transaction screens.



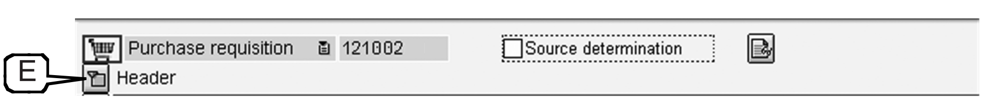
Header frame

When a purchase requisition is first created, the **Header frame** contains the **Text** tabbed subscreen. The left part of this subscreen (A) identifies the type of text in the header (*Header note*). Its right part contains a field where a header note is entered and displayed (B). The note can be deleted in one fell swoop by clicking the **Delete** **button** (C) beneath it.



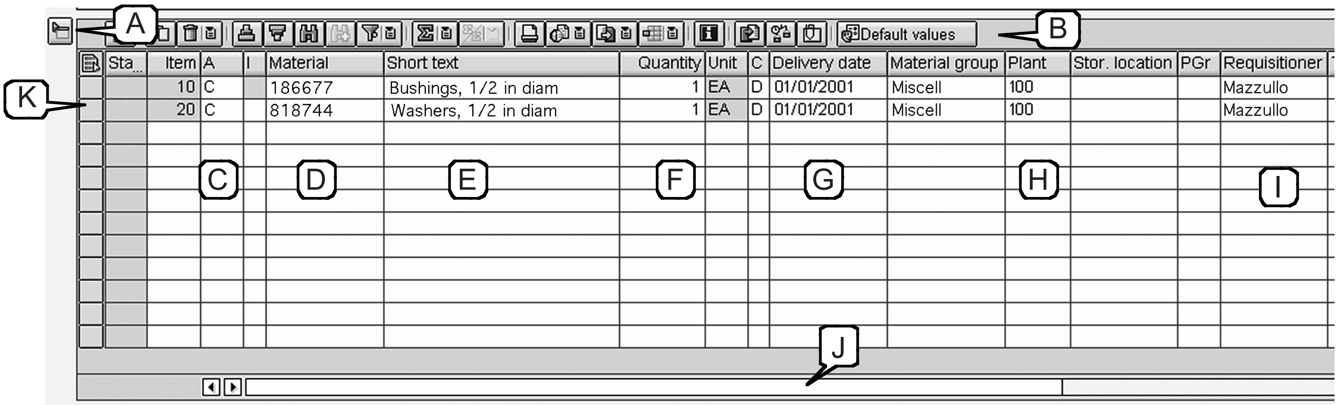
Once a purchase requisition is submitted and started to move through the approval process workflow, a second tab, **Release strategy**, appears. Click it to display the status of a purchase requisition in that workflow.

The header subscreen can be hidden from view by clicking the **Collapse header** **button** (D) to its left. This action is commonly taken to condense a screen and acquire easier access to the **Item frame**. When the header subscreen is collapsed, the button changes to the **Expand header** **button** (E); click it to display the header subscreen again.



Item overview frame

The **Item overview frame** can be displayed or hidden with the **Expand item overview** button (A) and the **Collapse item overview** button. The frame contains a **line-item table**, where data on materials or services that are being requisitioned are entered or displayed. This tab has its own **application toolbar** (B) with buttons for controlling the layout and content of the table.



When creating or changing a purchase requisition, enter data for one material or service on the first available line. If you don t know the required codes, you can search for them in the usual way.

Some of the most important columns in this table are:

- **Acct Assignment category** (C): for a code for a cost collector. Purchase requisitions are often charged to cost centers, production orders, service and maintenance orders, and other cost collectors that are set up in the Controlling module of SAP to track costs and income. Each type is represented by a code, such as *F* for *Internal order, K* for *Expense* and *W* for *Capital.*
- **Material** (D): for the code for a material. Double-click the entry in this column to display the master record for that material. If you are requisitioning a service, leave this field blank.
- **Short text** (E): for a description of the requisitioned material or service.
- **Quantity** (F): for the number of purchased items.
- **Delivery date** (G): for the expected date of delivery.
- **Plant** (H): for the place of delivery.
- **Requisitioner** or **Tracking Number** (I): for the name of the requisitioner. This is an important column, because you can use this entry to list-display all your requisitions (see the job aids *List-display of Purchase Requisitions* at the end of this manual).

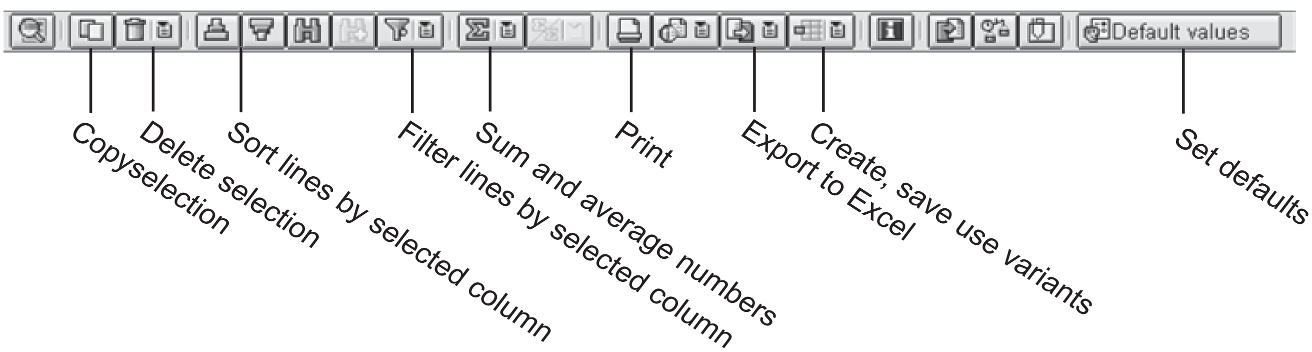
This table contains many columns, so you will need to use its scroll bar (J) to navigate its length. However, you can also narrow columns and display more columns in one screen view by clicking-and-dragging the margins of their headers.

Once you make the required entries on any one line, hit the **Enter key** on your keyboard. The system responds in one of two ways:

- ¥ *If you forgot to enter a required data,* the system displays a warning message in the status bar and sets the cursor into the empty column. Enter the missing data, then hit the **Enter key** again.
- ¥ *If you entered all the required data,* the system automatically enters data in other columns of the table (such as **Item** and **Unit of measure**). It also displays the **Item frame**, where you enter more detailed data about the requisition, at the bottom of the screen.

The application toolbar of the line-item table contains many buttons for working on the table. The most useful ones are identified on the screen image below.

Lastly, some buttons in the application toolbar (such as *Copy* and *Delete*) act on a selected line item in the table. To select a line item for action, click the selection box at its far left end (K on the previous page).



Customizing the Item Overview Table

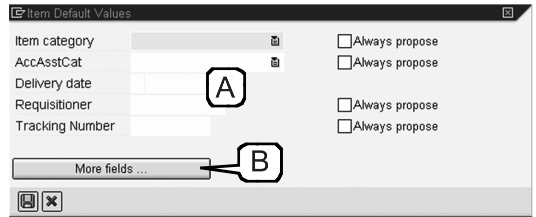
You can customize the line-item table in the **Item overview frame** so that it contains default entries in certain columns.

Consider this scenario: You are the purchasing group administrator for your department, which is located at a certain physical plant. When you create requisitions, you enter the same data in the **Plant**, **Purchasing group** and **Requisitioner column** of the line-item table. You can customize the purchasing screens so that this data is prepopulated when you navigate to them by following this next procedure.

Step 1. Call up the **Item Defaults Value screen** in one of two ways:

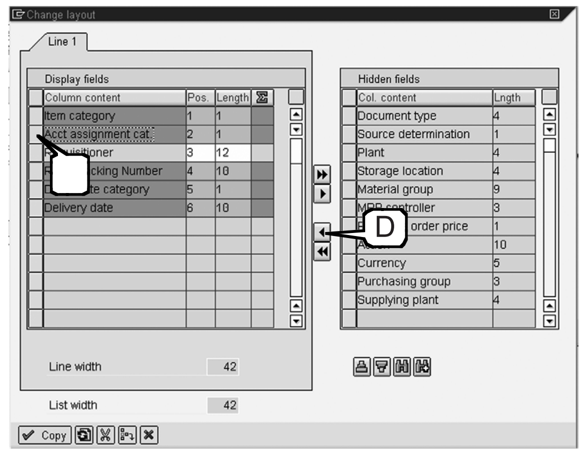
1. *Recommended:* Click the **Default values button** in the application toolbar above the line-item table *or*
2. *Slow way:* Click the **Personal settings button** of the main application toolbar to call up the **Personal settings screen**, then click the **Default values tab** on that screen.

Step 2. The **Item Default Values screen** appears. It contains fields for the default values for five columns (A). We will change it so that it displays fields for the **Plant**, **Purchasing group** and **Requisitioner columns**:



A. Click the **More fields button** (B).

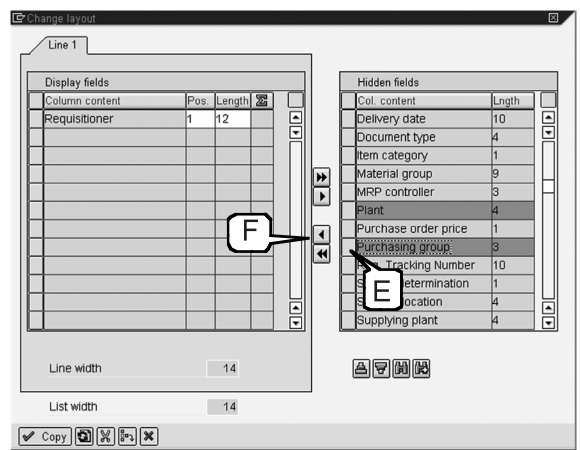
Step 3. The **Change layout screen** appears:



A. The left side of the screen contains the **Display fields window**, where the current fields on the **Item Default Values screen** are listed.

¥ Select and highlight the unwanted data fields by clicking their selection boxes (C).

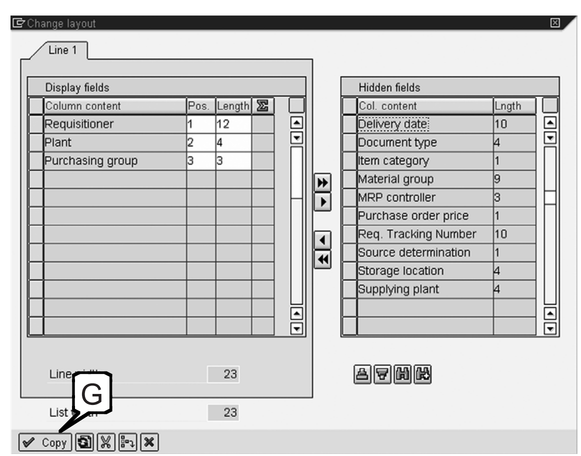
¥ Click the **Hide selected fields** button (D) to move them to the **Hidden fields window**.



B. The right side of the screen bears the **Hidden fields window**, where other fields are listed.

¥ Select and higlight the data fields you want to show on the **Item Default Values screen** by clicking their selection boxes (E).

¥ Click the **Show selected fields** button (F) to move them to the **Display fields window**.



C. Click the **Copy button** (G) to save your changes to the screen.

And so on...