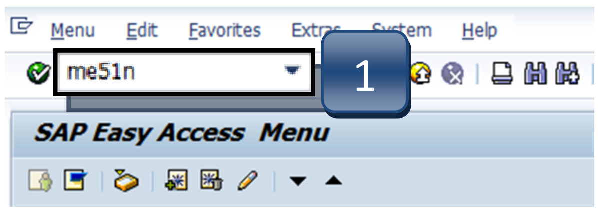
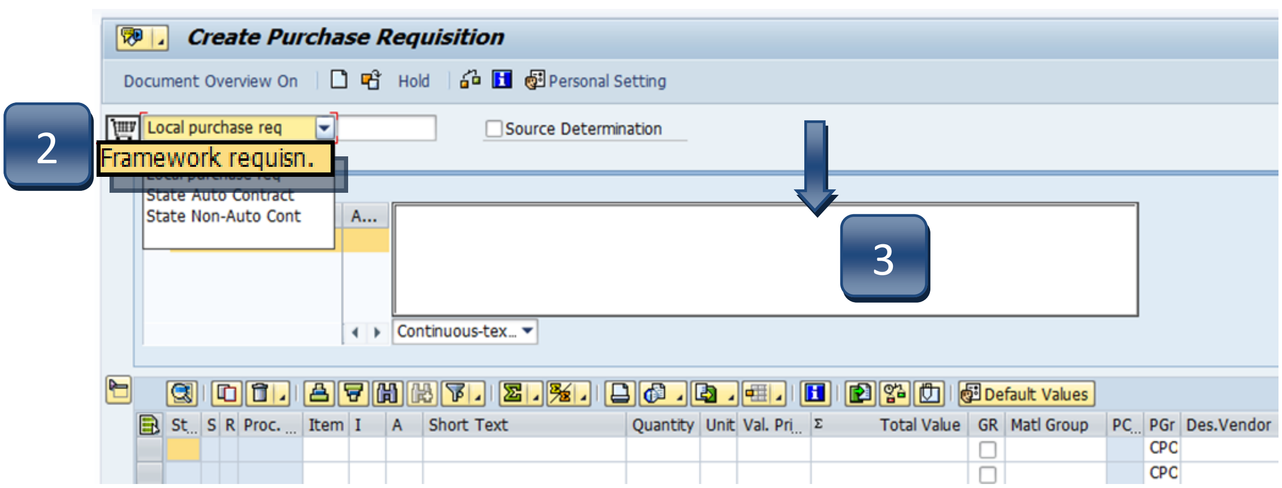
Create a Framework Requisition

Used for the creation of Service request

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



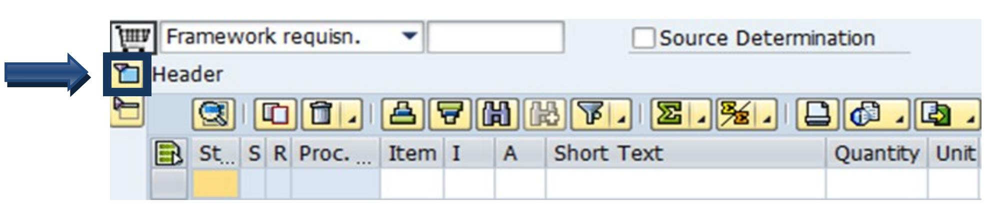


STEP 2: Select **Framework requisn.** as document type from the drop-down menu.

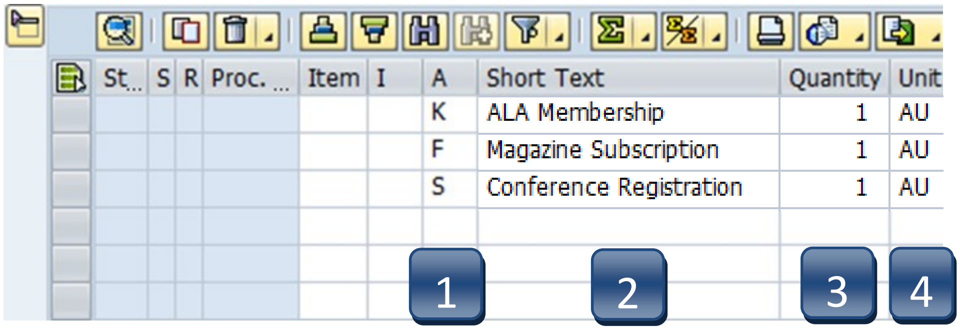
STEP 3: In **Header note** section add:

- 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

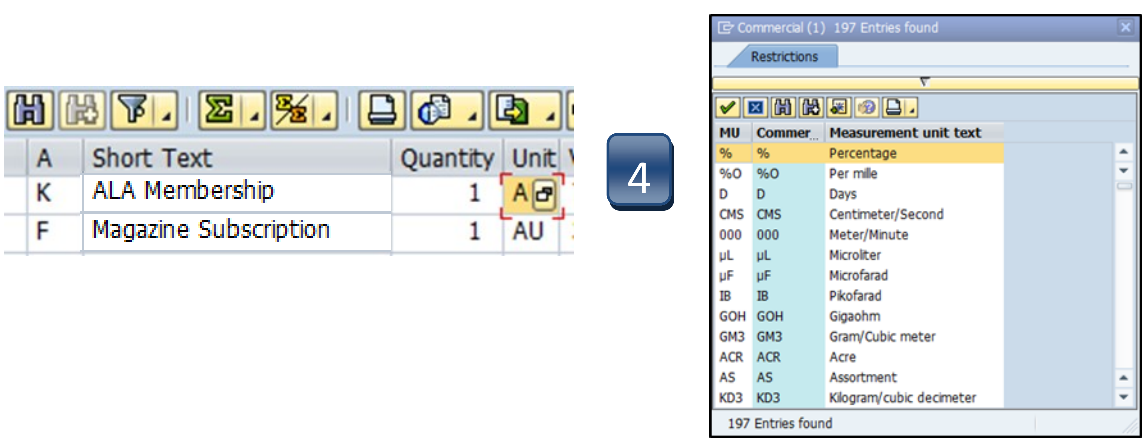


STEP 1: **A (Account Assignment Category) column**: Enter **K (Cost Center)**, **F (Internal Order)**, or **S (Statistical Order)** for each line item. (Use down arrow on keyboard to move between lines.)

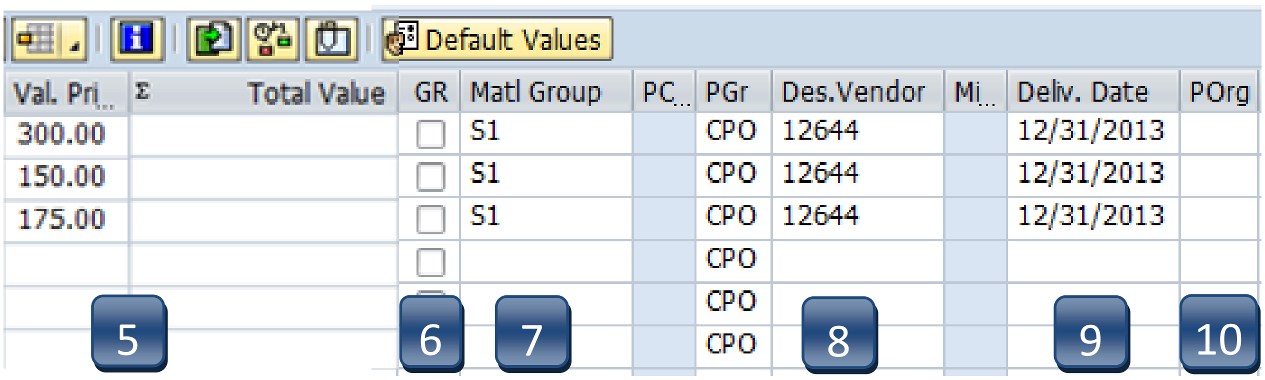
STEP 2: **Short Text column**: Enter item short text. (What you are purchasing.)

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.**



Create a Framework Requisition - Line Items

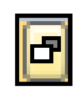


STEP 5: **Valuation Price column:** Enter **TOTAL** activity price.
Total Value will be automatically populated later.
If Total Value is $5,000 or greater, you will need to attach justification documentation to the requisition. (See Attaching a Document section.)

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)

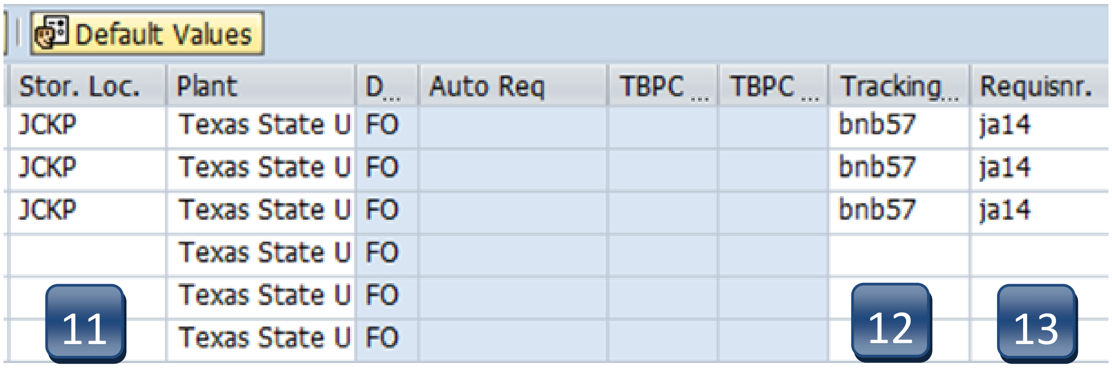


****Vendor number should be the same on ALL lines. A requisition should not have more than one vendor number.**

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					
	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: **Requistioner column:** Enter the NetID of the person for whom you are creating the requisition.

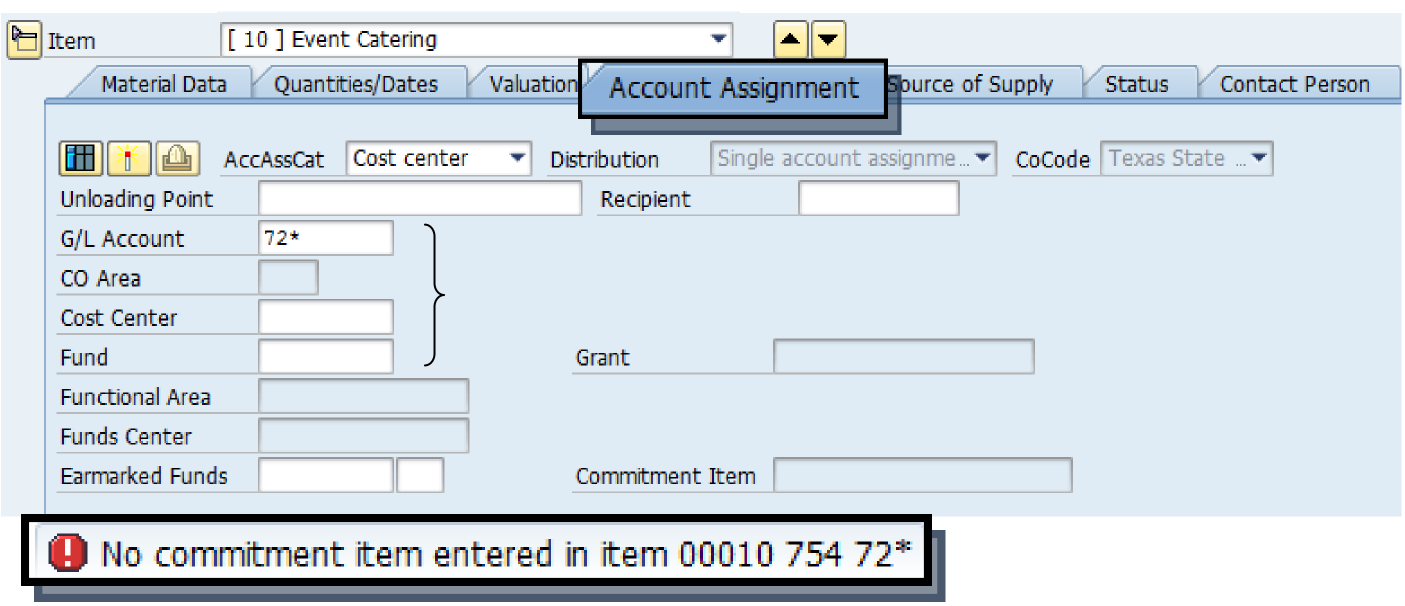
****If you have more than one line item, move to the next line using the down arrow on your keyboard and repeat STEPS 1-13 as many times as necessary.**

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

Create a Framework Requisition - Item Tab Detail

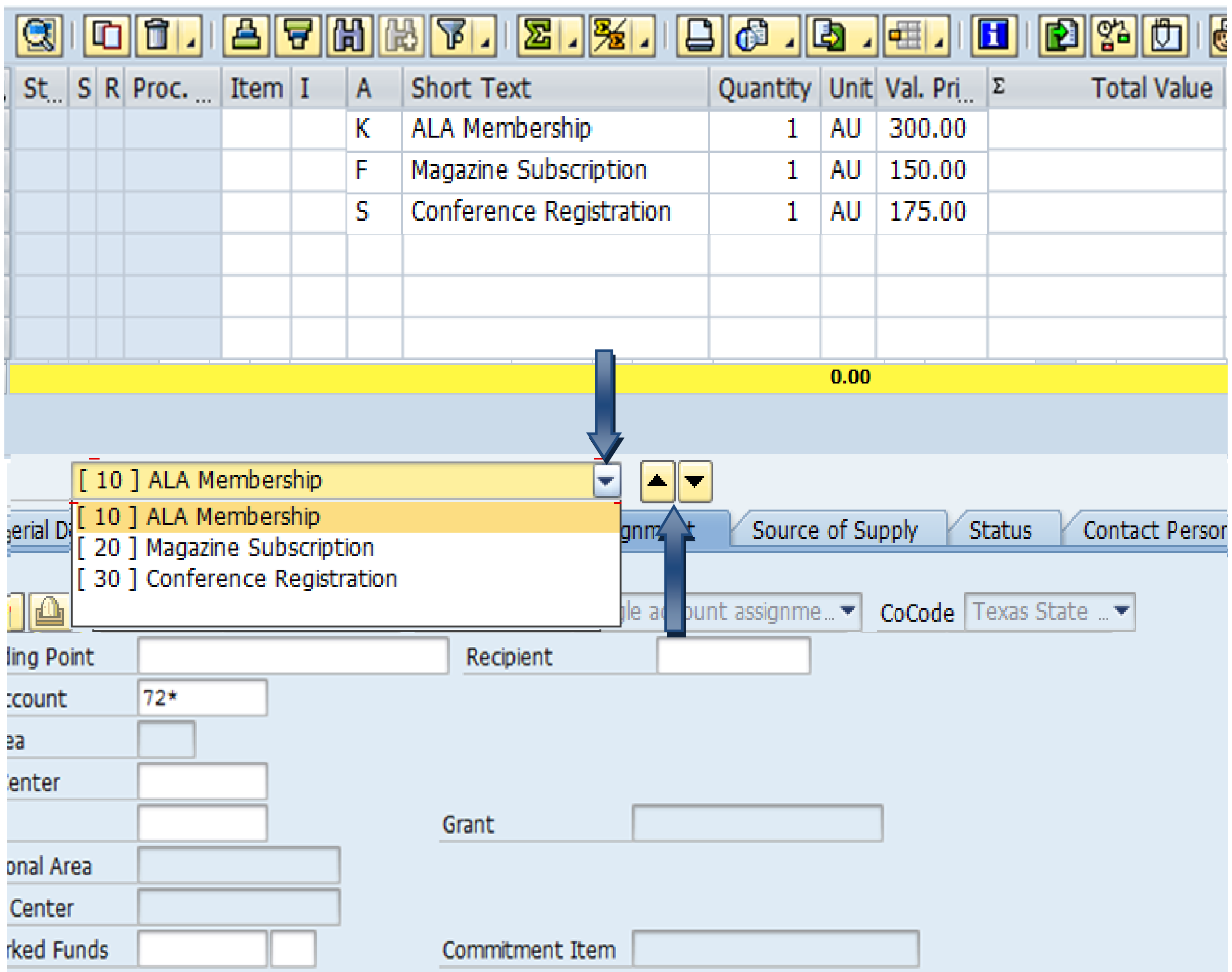
Tip

- **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.**

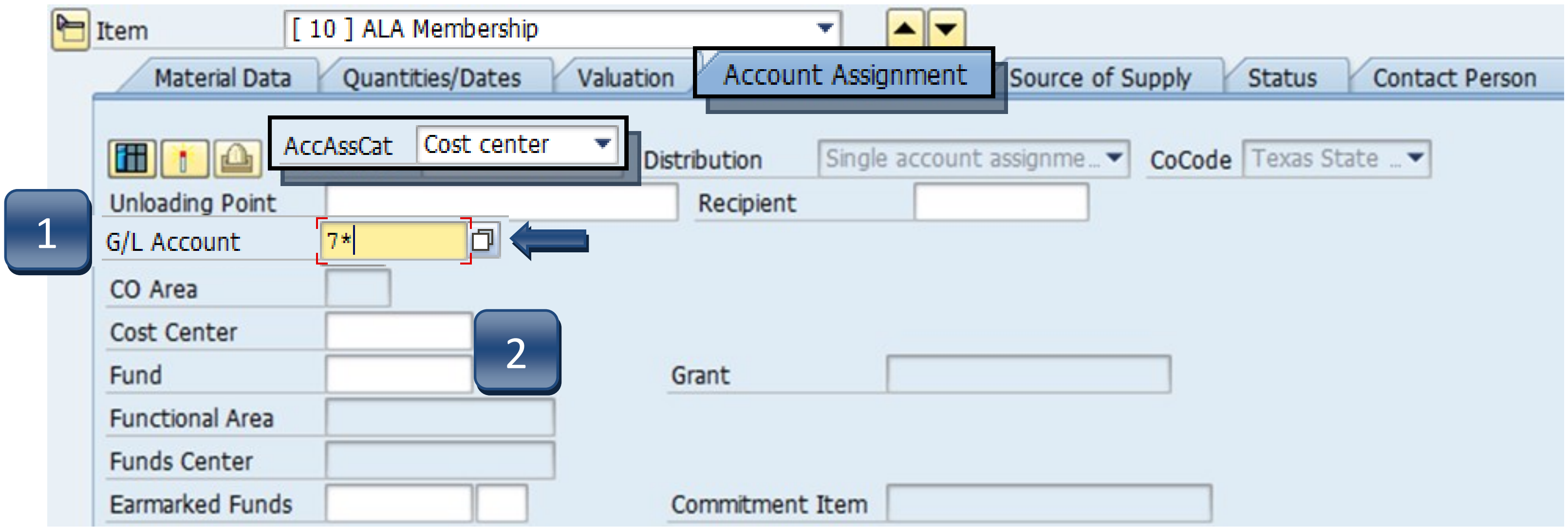


Create a Framework Requisition - Item Tab Detail

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.



Create a Framework Requisition - Item Tab Detail

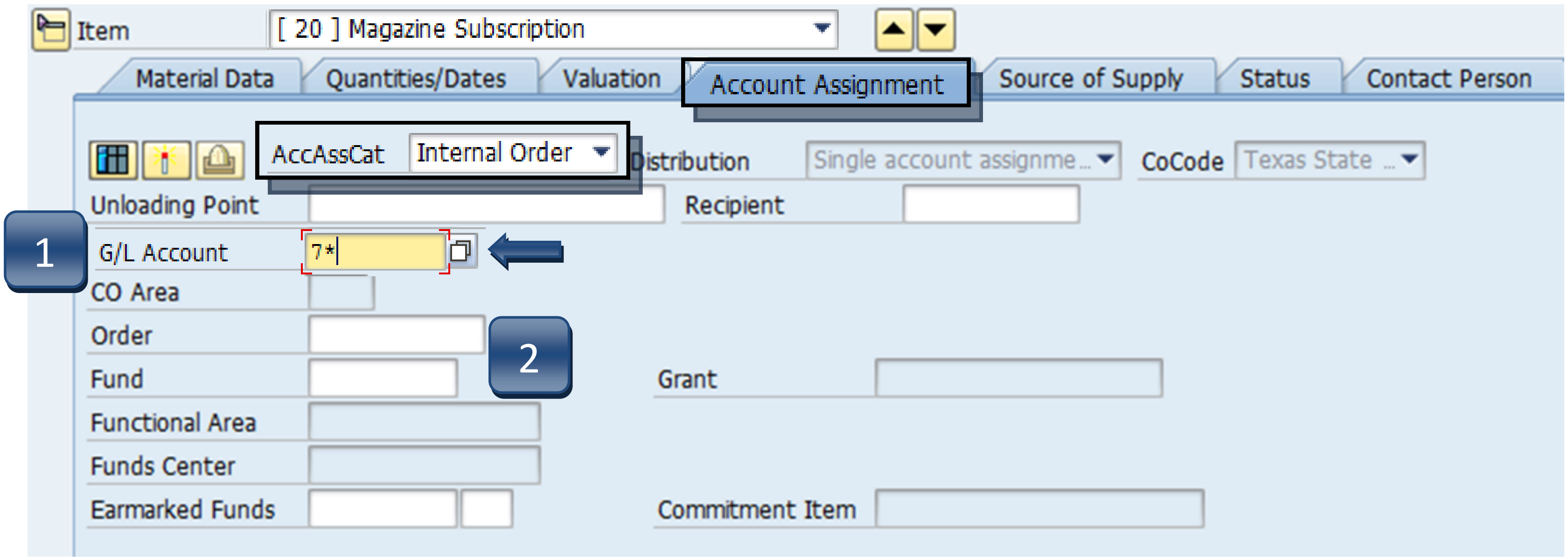


Account Assignment Tab – Cost Center (K)

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 Framework Requisition - Item Tab Detail

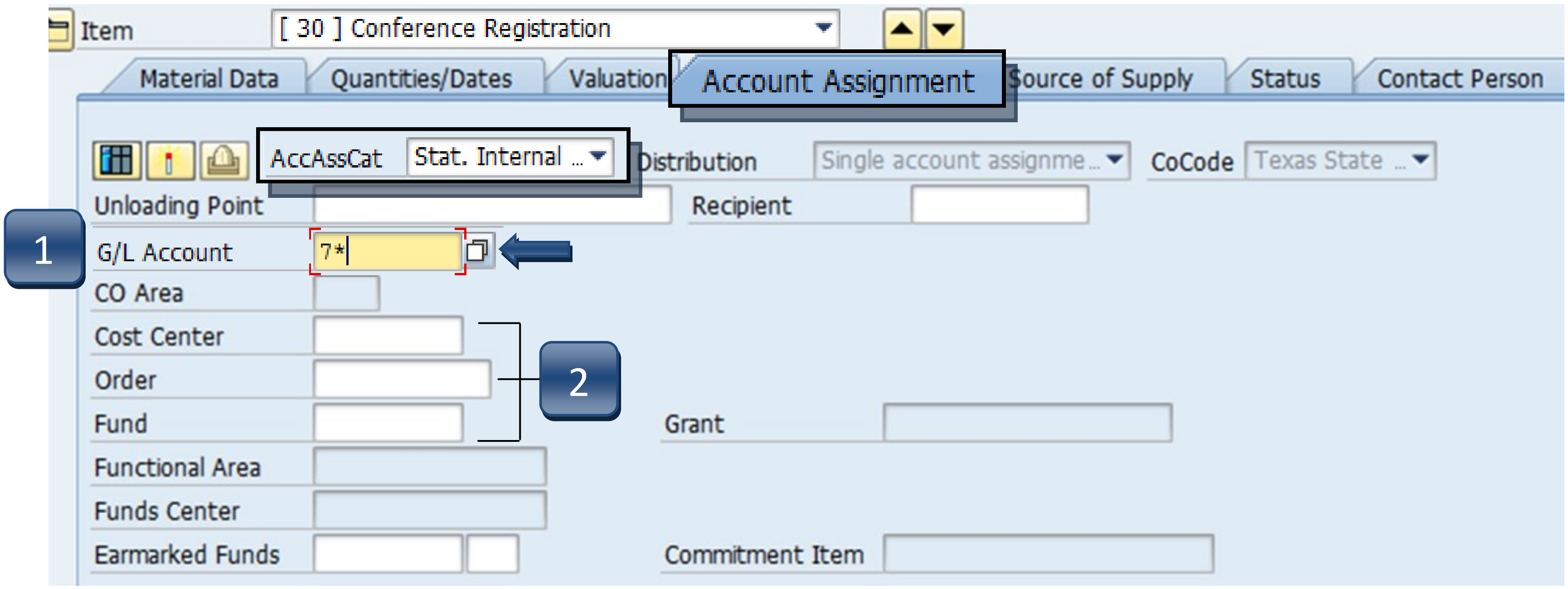


Account Assignment Tab – Internal Order (F)

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.*

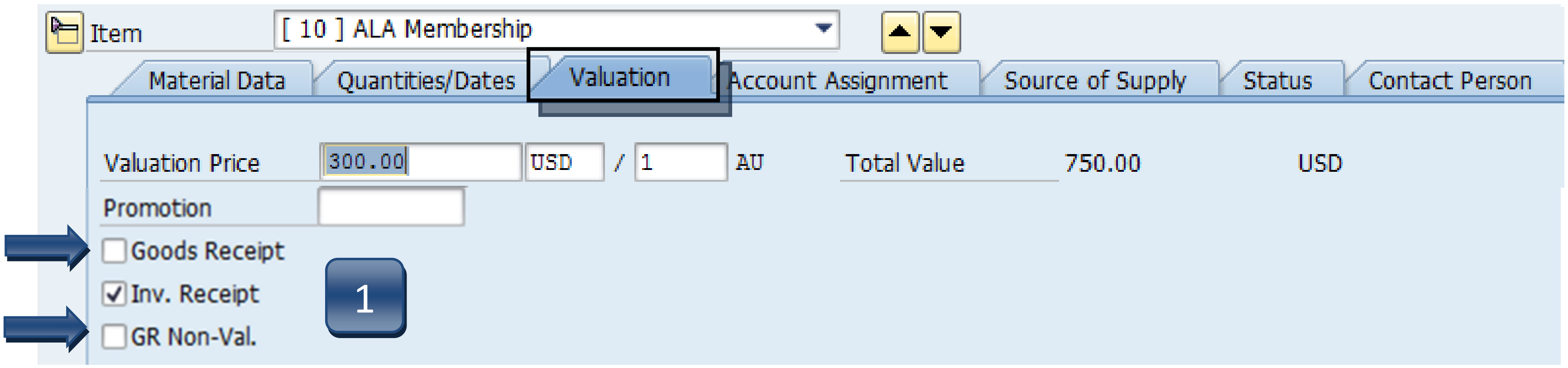
Create a Framework Requisition - Item Tab Detail



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.*



Valuation Tab

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

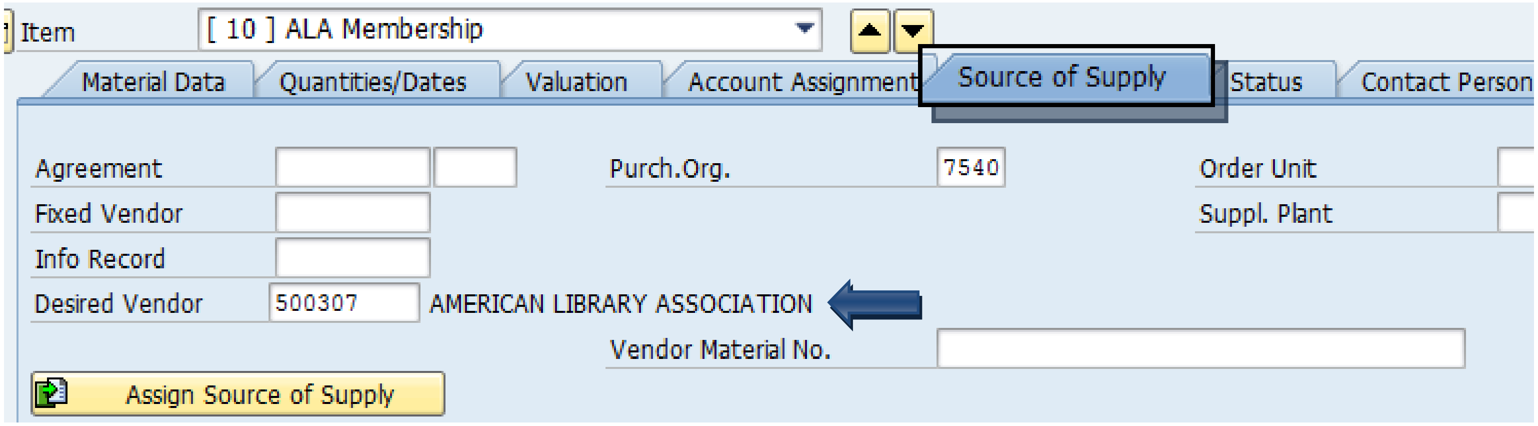
GOODS = LOCAL REQUEST

SERVICES = FRAMEWORK REQUEST

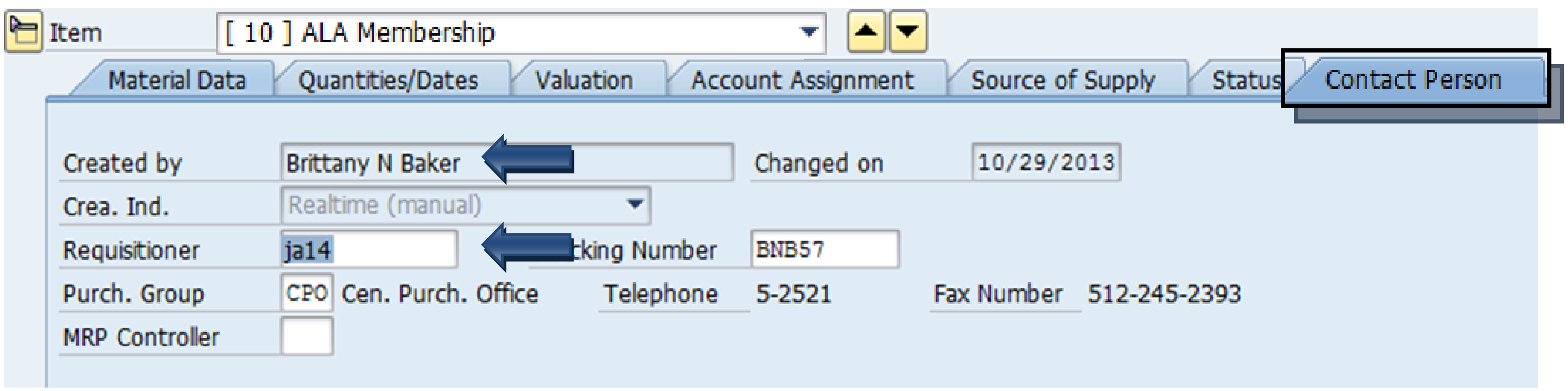
STEP 2: **In the Line Items section, uncheck the GR column box for each *Service* line.** For some reason the system inserts a checkmark in this box after you have completed adding line items and pressed ENTER to get down into the tab detail section.

Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value	GR	Matl Group
ALA Membership	1	AU	300.00		[illegible]	☐	Services, Nor
Magazine Subscription	1	AU	150.00		[illegible]	☐	Services, Nor
Conference Registration	1	AU	175.00		175.00	☐	Services, Nor

Create a Framework Requisition - Item Tab Detail

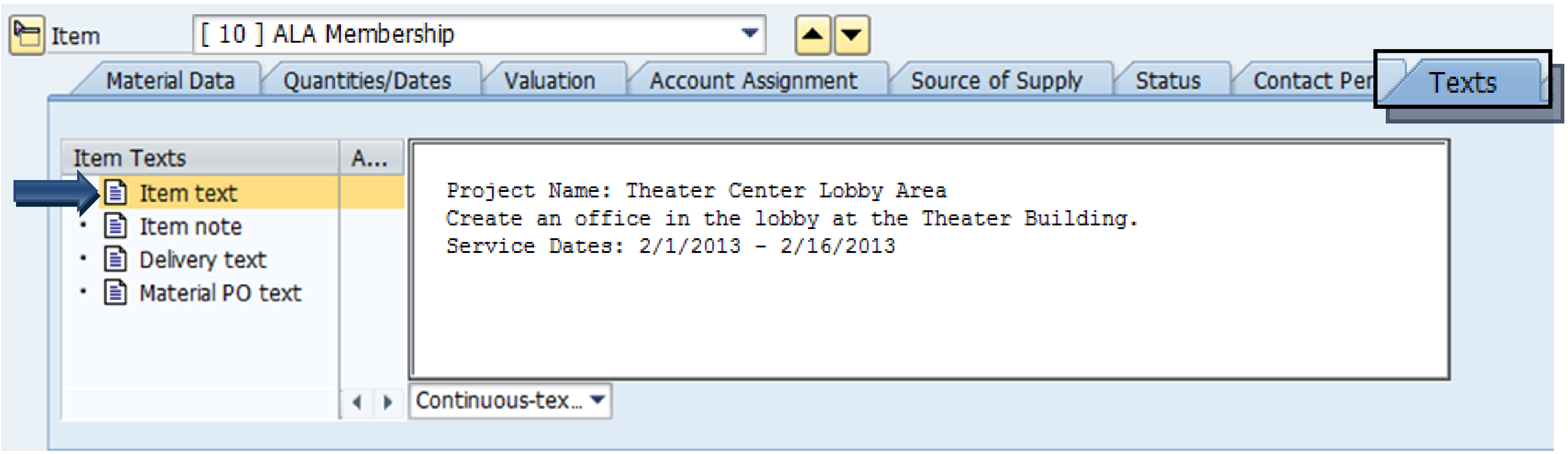


Source of Supply Tab: Verify vendor listed is correct.



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.

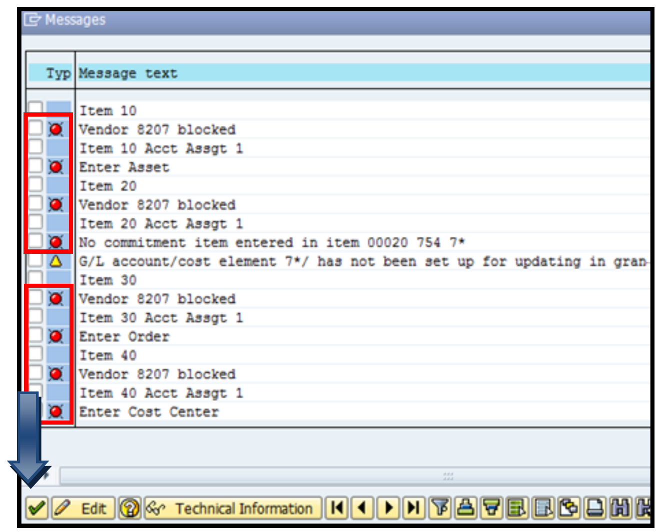
Create a Framework Requisition - Check, Save, and Submit

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.



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