
Create a Limit Framework Requisition

Used for the creation of services requisitions and/or multiple payments

Once you determine the vendor, the vendor is required by federal and state governments, to be checked to determine if there are any sanctions or debarments that would prohibit the university from doing business with them for **ALL** purchases \$15,000 and above. The sites are:

<https://mycpa.cpa.state.tx.us/coa/> – Franchise Tax

<https://sam.gov/SAM/> - SAM – Federal Debarment

<https://fmcpa.cpa.state.tx.us/tpis/> – Vendor Warrant/Payment Hold

<https://comptroller.texas.gov/purchasing/programs/vendor-performance-tracking/debarred-vendors.php> – Texas Debarment

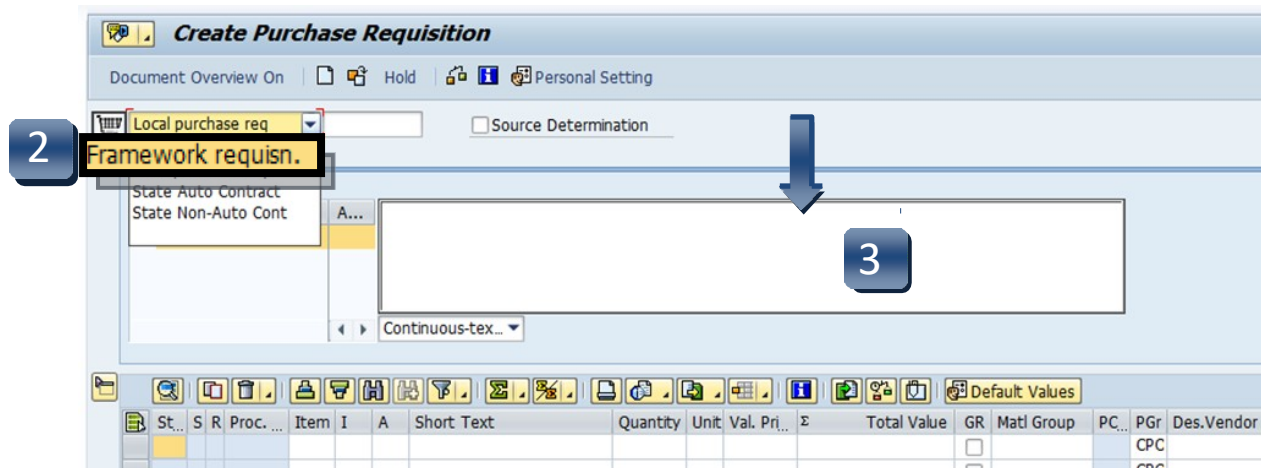
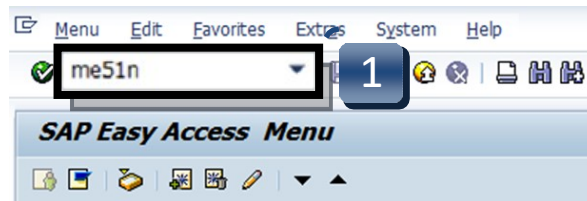
<https://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx> – The is OFAC

<https://comptroller.texas.gov/purchasing/publications/divestment.php> – This is the Comptroller site that has all the links except OFAC

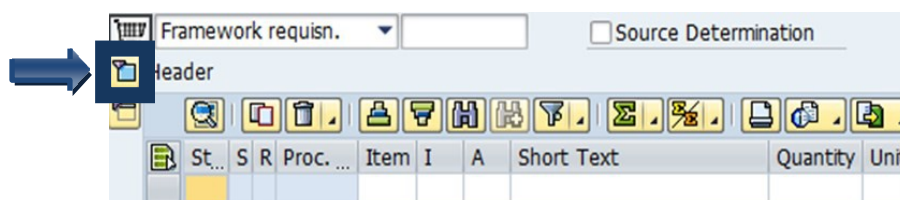
See Attaching a Document section.

Create a Limit Framework Requisition

- STEP 1:** Enter transaction code **ME51N** in main menu search field.
Press **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 or stay (lodging). **Dates are required to ensure there are no delays in creating the PO.**
-**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 lodger(s),confirmation/registration #
-Name of event, date, time, location, # of attendees



If header section is not visible, click **Expand Header button to display.



Create a Limit Framework Requisition - Line Items



It is *imperative* that the following 14 steps are completed exactly in the order that they are listed. If information is entered out of sequence, the system *will not* generate the **LIMITS** tab correctly!

- STEP 1:** **I (Item Category) column:** Enter a **B** for each line (use down arrow on keyboard to move between lines) that will be processed as a **LIMIT**.
****This step is what makes the Framework requisition a LIMIT Framework.**
- STEP 2:** **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.)
****A column cannot be changed once STEP 15 is completed.**
- STEP 3:** **Short Text column:** Enter item short text. (What you are purchasing.)
- STEP 4:** **Quantity column:** Enter quantity. (1 if using AU as Unit of Measure.)
- STEP 5:** **Unit of Measure column:** Should default to **AU**. If another code is needed, either type it in or use the database search for available options. (Click the button in the lower right corner of the field.)
****Never use UNT.**

St...	S	R	Proc...	Item	I	A	Short Text	Quantity	Unit
					B	K	Event Catering	1	AU
					B	F	Lodging	1	AU
					B	F	Lodging Tax	1	AU
					B	S	Building Repairs	1	AU

MU	Commercial	Measurement unit text
"	"	Inch
"2	"2	Square inch
"3	"3	Cubic inch
%	%	Percentage
%O	%O	Per mille
000	000	Meter/Minute
A/V	A/V	Siemens per meter
ACR	ACR	Acre
AS	AS	Assortment
AU	AU	Activity unit
BA	BA	Bale

Create a Limit Framework Requisition - Line Items

STEP 6: Valuation Price & Total Value columns: Leave blank. They will be entered in the LIMITS tab once all line entry STEPS are complete.

If Total Value is \$15,000 or greater, you will need to attach justification documentation to the requisition. (See Attaching a Document section.)

STEP 7: GR column: All boxes should be *unchecked* since this is a FRAMEWORK requisition and should be used for *Services* only.

STEP 8: 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 Framework requisitions.**

STEP 9: 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 cannot have more than one vendor number.**



STEP 10: Delivery Date column: Enter date services will be completed. (mm/dd/yyyy)

STEP 11: POrg column: Leave blank.

****7540 should populate once all STEPS are complete.**

Val. Pri..	Σ	Total Value	GR	Matl Group	PC..	PGr	Des.Vendor	Mi..	Deliv. Date	POrg
			<input type="checkbox"/>	S1		CPC	12644		12/31/2013	
			<input type="checkbox"/>	S1		CPC	12644		12/31/2013	
			<input type="checkbox"/>	S1		CPC	12644		12/31/2013	
			<input type="checkbox"/>	S1		CPC	12644		12/31/2013	
			<input type="checkbox"/>			CPC				
			<input type="checkbox"/>			CPC				
			<input type="checkbox"/>			CPC				

Create a Limit Framework Requisition - Line Items

STEP 12: Storage Location column: Use the database search to select the storage location if you do not know the code for the location.

STEP 13: Tracking Number column: Enter your NetID.

STEP 14: Requisitioner 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 1-14 as many times as necessary.**

STEP 15: Press **ENTER** on your keyboard to generate the **Item Tabs** section.

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					
12	Texas State U	FO				13	14
	Texas State U	FO					

Create a Limit Framework Requisition - Item Tab Detail



- After pressing ENTER to complete the line item additions in the previous section, you will be taken into the LIMITS Tab area where funding information is entered.
- The error message *'Maintain services or limits for Item...'* means that your account information is required in the LIMITS tab.
- **Account Assignment tab will not be used.**

The screenshot shows the SAP Item Limits tab for item [10] Event Catering. The 'Limits' tab is selected and highlighted with a black box. Below the tabs, there are input fields for 'Overall Limit' and 'Expected value', both currently empty. The 'Overall Limit' field has a 'USD' unit selector and a 'No limit' checkbox. A yellow arrow icon points to the right. At the bottom, a red error message box with a white exclamation mark icon contains the text: 'Maintain services or limits for Item 00010'.

Create a Limit 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.

The screenshot displays the SAP Requisition Item Tab Detail interface. At the top, there is a toolbar with various icons for navigation and actions. Below the toolbar is a table with the following columns: St..., S, R, Proc..., Item, I, A, Short Text, Quantity, Unit, Val. Pri..., Σ, and Total Value. The table contains four line items:

St...	S	R	Proc...	Item	I	A	Short Text	Quantity	Unit	Val. Pri...	Σ	Total Value
•	N			10	B	K	Event Catering	1	AU	0.00		0.00
•	N			20	B	F	Lodging	1	AU	0.00		0.00
•	N			30	B	F	Lodging Tax	1	AU	0.00		0.00
•	N			40	B	S	Building Repairs	1	AU	0.00		0.00

Below the table, there is a summary bar with a total value of 0.00. The interface also includes a navigation area with a search field and a dropdown menu. The dropdown menu is currently open, showing the following items:

- [10] Event Catering
- [10] Event Catering
- [20] Lodging
- [30] Lodging Tax
- [40] Building Repairs

Arrows indicate the navigation controls: a blue arrow points down to the dropdown menu, and two blue arrows point up to the up and down arrow buttons next to the dropdown menu.

Create a Limit Framework Requisition - Item Tab Detail

Limits Tab

- STEP 1:** Enter **Overall Limit** (cushion amount Accounts Payable can pay up to) in Overall Limit field. **The Overall Limit does not encumber the funds.**
****No limit should never be checked.**
- STEP 2:** Enter **Expected value** (amount to be encumbered) in **Expected value** field. This amount is never larger than the Overall Limit field.
- STEP 3:** Click the **Account Assignment** (yellow arrow) button. The **Account Assignment of Limit** menu appears that allows you to enter the accounting and funding codes.

Item [10] Event Catering

Limits | Material Data | Quantities/Dates | Valuation | Account Assignment | Source of Supply

1 Overall Limit 900.00 USD No limit 3

2 Expected value 750.00

Account Assignment of Limit

G/L Account 72*

CO Area

Cost Center

Fund

Functional Area

Funds Center

Earmarked Funds

Company Code 754

Grant

Commitment Item

Create a Limit Framework Requisition - Item Tab Detail

Account Assignment of Limit - 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.*

STEP 3: Click the green check.

The screenshot shows a software window titled "Account Assignment of Limit". The form contains the following fields and controls:

- G/L Account:** A text box containing "72*" with a yellow highlight and a red box around it. A blue arrow points to the right of this field.
- Company Code:** A text box containing "754".
- CO Area:** An empty text box.
- Cost Center:** An empty text box.
- Fund:** A text box with a checked checkbox. A blue box with the number "2" is positioned to its right.
- Grant:** An empty text box.
- Functional Area:** An empty text box.
- Funds Center:** An empty text box.
- Earmarked Funds:** Two empty text boxes.
- Commitment Item:** An empty text box.
- Buttons:** A blue box with the number "3" is positioned above a green checkmark icon and a red 'X' icon at the bottom right of the form.

Multiple Account Assignment Codes CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail

Account Assignment of Limit - 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.*

STEP 3: Click the green check

The screenshot shows a web-based form titled "Account Assignment of Limit". The form has several input fields and a "Company Code" field. A blue arrow points from the "G/L Account" field to the "Company Code" field. Three numbered callouts are present: 1 points to the "G/L Account" field containing "72*", 2 points to the "Fund" field which has a checked checkbox, and 3 points to a green checkmark icon at the bottom right of the form. The "Earmarked Funds" field is empty.

1	G/L Account	72*	Company Code	754
	CO Area			
	Order			
	Fund	<input checked="" type="checkbox"/>	Grant	
	Functional Area			
	Funds Center			
	Earmarked Funds		Commitment Item	

Multiple Account Assignment Codes CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail

Account Assignment of Limit - 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.*

STEP 3: Click the green check.

The screenshot shows a dialog box titled "Account Assignment of Limit". It contains several input fields and checkboxes. A blue callout box with the number "1" points to the "G/L Account" field, which contains "72*" and has a red selection box around it. A blue callout box with the number "2" points to the "Order" field, which has a checked checkbox. A blue callout box with the number "3" points to a green checkmark icon at the bottom right of the dialog box. Other fields include "Company Code" (754), "CO Area", "Cost Center" (checked), "Fund" (checked), "Grant", "Functional Area", "Funds Center", "Earmarked Funds", and "Commitment Item".

Multiple Account Assignment Codes CANNOT be used on a LIMIT line.

Create a Limit Framework Requisition - Item Tab Detail

Source of Supply Tab:

Verify vendor listed is correct.

The screenshot shows the 'Source of Supply' tab selected. The 'Item' dropdown is set to '[30] Building Repairs'. The 'Desired Vendor' field contains '12644' and 'COOL MINT INC'. A blue arrow points to this vendor name. The 'Purch.Org.' field contains '7540'. The 'Vendor Material No.' field is empty. A yellow button labeled 'Assign Source of Supply' is visible at the bottom left.

Contact Person Tab:

The person creating the requisition will be listed in the **Created by** field. The person who the purchase is for will be listed in the **Requisitioner** field. Purchasing will contact this person if there are any questions/issues with the requisition

The screenshot shows the 'Contact Person' tab selected. The 'Item' dropdown is set to '[30] Building Repairs'. The 'Created by' field contains 'Brittany N Baker' with a blue arrow pointing to it. The 'Crea. Ind.' dropdown is set to 'Realtime (manual)'. The 'Requisitioner' field contains 'ja14' with a blue arrow pointing to it. The 'Working Number' field contains 'BNB57'. The 'Purch. Group' is 'CPO', 'Cen. Purch. Office' is checked, 'Telephone' is '5-2521', and 'Fax Number' is '512-245-2393'. The 'MRP Controller' field is empty.

Create a Limit Framework Requisition - Item Tab Detail

Texts Tab

Item Text:

Insert any notes that you would like *printed* on the purchase order:

Lodging requisitions

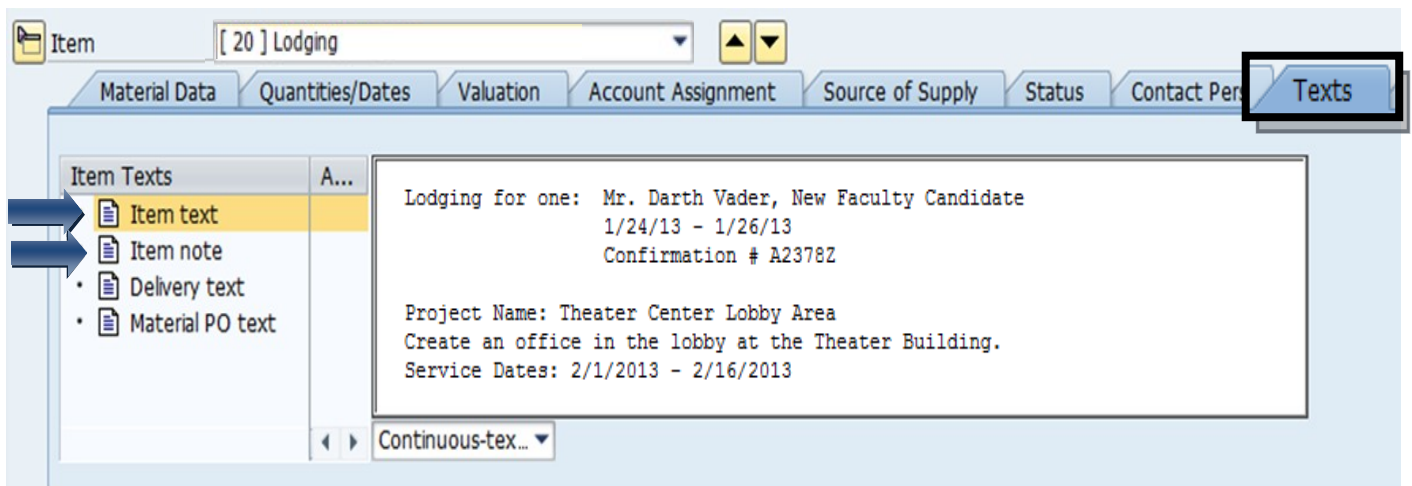
- **WHO** will be staying.
- **DATES** of their stay.
- **CONFIRMATION** or **RESERVATION** number.

Contract requisitions

- **PAYMENT SCHEDULE** or **TERMS** with **DATES**.
- **DATES** of **ENTIRE CONTRACT** or **SERVICE**.
- Brief **STATEMENT** of **WORK**.

Item Note:

In the **Item Note** field, insert any notes for the purchasing department. This must include the contract number for all purchases \$15, 000 and greater, either the Total Contract Manager contract number, the consortium contract number, etc. This is where you would state if it is a sole source or proprietary purchase. In addition, list the contact person's name, phone number and email address for any questions on the order or invoice.



The screenshot shows the SAP Item Texts tab for item [20] Lodging. The 'Texts' tab is selected and highlighted with a red box. The 'Item Texts' table on the left has 'Item text' selected, indicated by a red arrow. The main text area contains the following information:

Lodging for one: Mr. Darth Vader, New Faculty Candidate
1/24/13 - 1/26/13
Confirmation # A2378Z

Project Name: Theater Center Lobby Area
Create an office in the lobby at the Theater Building.
Service Dates: 2/1/2013 - 2/16/2013

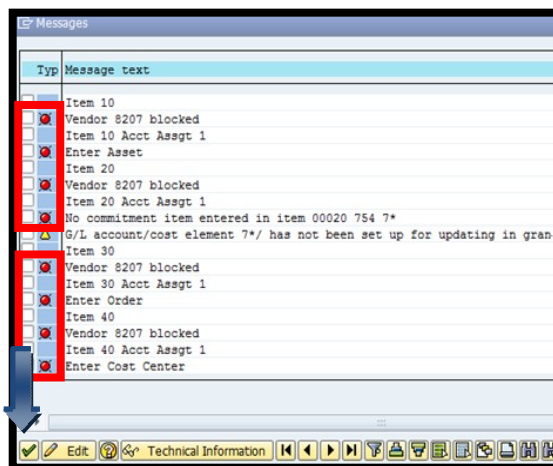
Create a Limit Framework Requisition - Check, Save, and Submit

STEP 1: Click the **Check** icon to check for errors.



SAP will check your requisition and generate a window that displays 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