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## Create a Limit Framework Requisition

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

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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

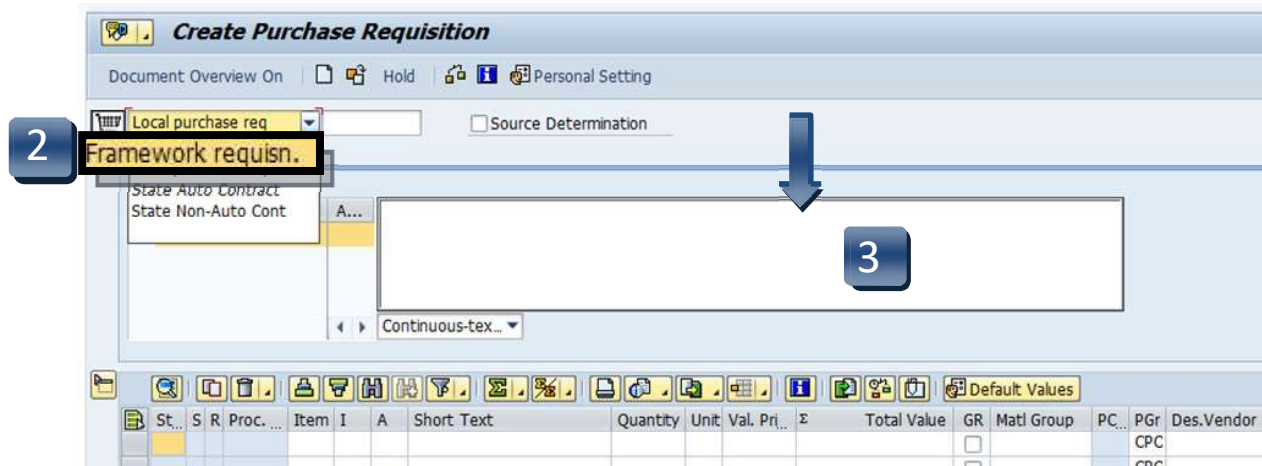
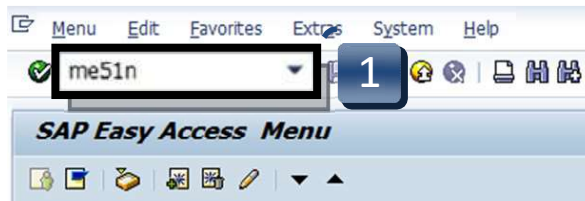
<https://www.treasury.gov/about/organizational-structure/offices/Pages/Office-of-Foreign-Assets-Control.aspx> – The is OFAC

<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					
<b>12</b>	Texas State U	FO				<b>13</b>	<b>14</b>
	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 'Limits' tab for item '[ 10 ] Event Catering'. The 'Limits' tab is highlighted with a black box. Below the tabs, there are input fields for 'Overall Limit' and 'Expected value', a 'USD' currency 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 a software interface for managing requisitions. At the top, there is a toolbar with various icons. Below it is a table with the following data:

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 row with a total value of 0.00. The interface also shows a detailed view of the 'Item' field, which is currently set to '[ 10 ] Event Catering'. A dropdown menu is open, showing the following options:

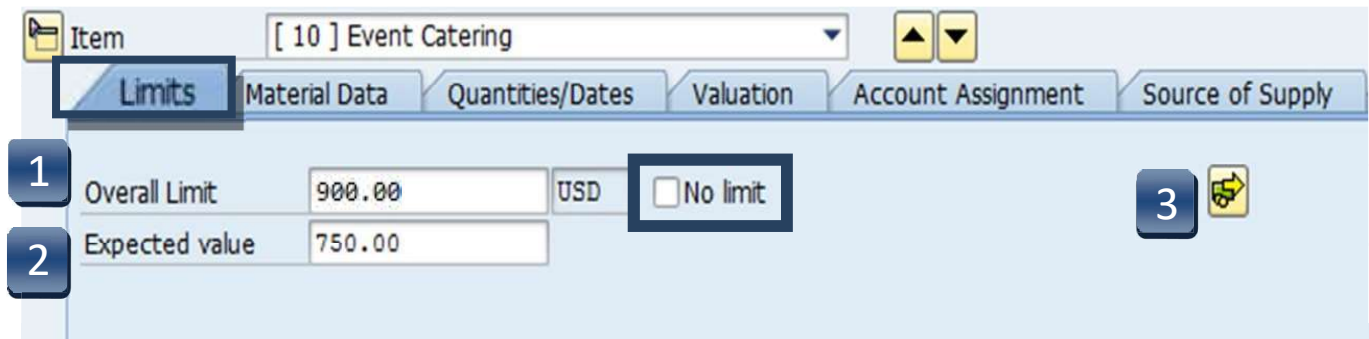
- [ 10 ] Event Catering
- [ 20 ] Lodging
- [ 30 ] Lodging Tax
- [ 40 ] Building Repairs

Navigation arrows (up and down) are visible next to the dropdown menu, and a blue arrow points to the dropdown arrow icon.

# Create a Limit Framework Requisition - Item Tab Detail

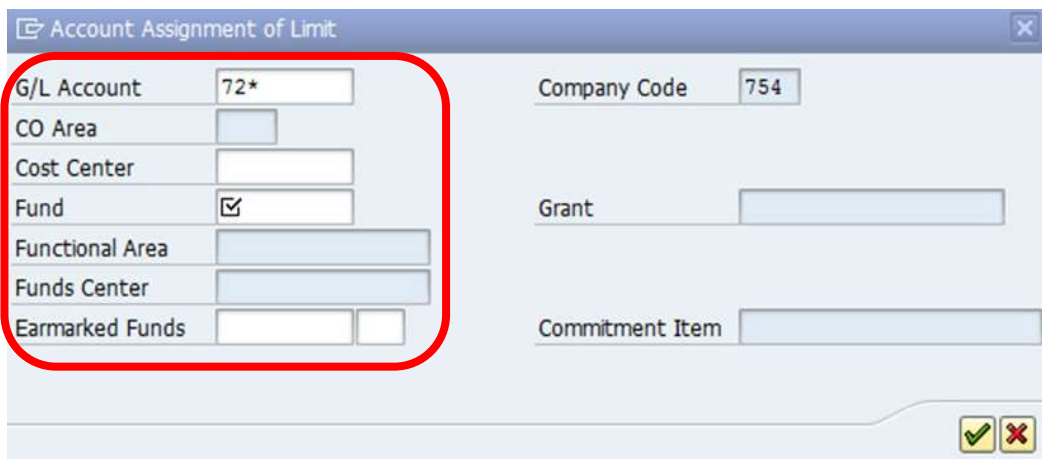
## Limits Tab

- 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.



The screenshot shows the SAP Item Limits tab for item [ 10 ] Event Catering. The 'Limits' tab is selected. The 'Overall Limit' field contains 900.00 USD, and the 'Expected value' field contains 750.00. A 'No limit' checkbox is present and is unchecked. A yellow arrow button is visible on the right side of the tab.

Field	Value	Unit	Option
Overall Limit	900.00	USD	<input type="checkbox"/> No limit
Expected value	750.00		



The screenshot shows the 'Account Assignment of Limit' dialog box. The 'G/L Account' field is highlighted with a red circle and contains the value 72\*. The 'Company Code' field contains 754. The 'Fund' field has a checked checkbox. The 'Grant' and 'Commitment Item' fields are empty.

Field	Value
G/L Account	72*
CO Area	
Cost Center	
Fund	<input checked="" type="checkbox"/>
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.

1 G/L Account 72\* Company Code 754

CO Area

Cost Center

Fund  2

Functional Area

Funds Center

Earmarked Funds

Grant

Commitment Item

3

**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 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 blue arrow pointing left. A blue callout box with the number "1" is positioned to its left.
- Company Code:** A text box containing "754".
- CO Area:** An empty text box.
- Order:** An empty text box.
- Fund:** A text box with a checked checkbox. A blue callout box with the number "2" is positioned to its right.
- Functional Area:** An empty text box.
- Funds Center:** An empty text box.
- Earmarked Funds:** Two empty text boxes.
- Grant:** An empty text box.
- Commitment Item:** An empty text box.
- Bottom Right:** A blue callout box with the number "3" is positioned above a green checkmark icon and a red X icon.

**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 software 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 the text "72\*" and has a yellow highlight. 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 in the bottom right corner of the dialog box. Other fields include "Company Code" (754), "CO Area", "Cost Center" (checked), "Fund" (checked), "Functional Area", "Funds Center", "Earmarked Funds", "Grant", 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.


Item [ 30 ] Building Repairs

Material Data | Quantities/Dates | Valuation | Account Assignment | **Source of Supply** | Status | Contact Person

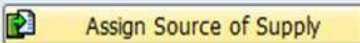
Agreement   Purch.Org. 7540 Order Unit

Fixed Vendor  Suppl. Plant

Info Record

Desired Vendor 12644 COOL MINT INC 

Vendor Material No.




## 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

Item [ 30 ] Building Repairs

Material Data | Quantities/Dates | Valuation | Account Assignment | Source of Supply | Status | **Contact Person**

Created by Brittany N Baker  Changed on 10/29/2013

Crea. Ind. Realtime (manual)

Requisitioner ja14  Tracking Number BNB57

Purch. Group CPO Cen. Purch. Office Telephone 5-2521 Fax Number 512-245-2393

MRP Controller

# 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

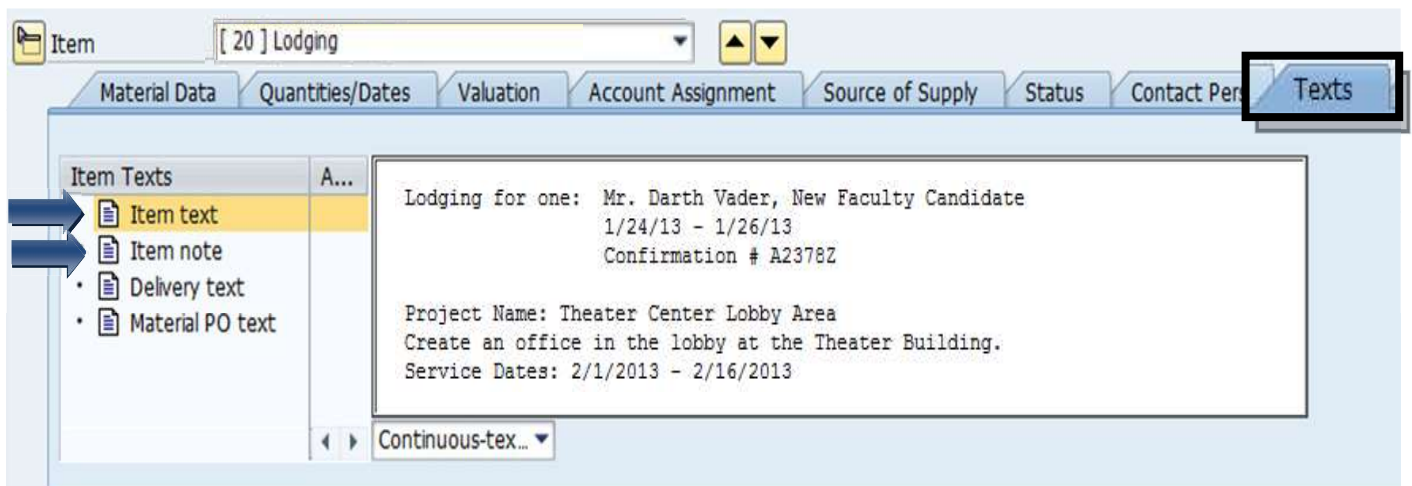
- **WHO** will be staying.
- **DATES** of their stay.
- **CONFIRMATION** or **RESERVATION** number.

#### 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

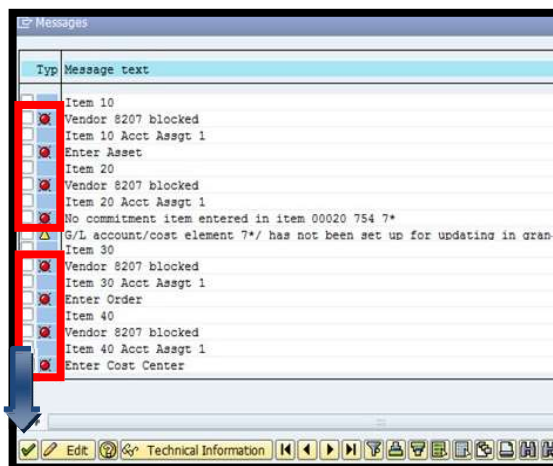
## Create a Limit Framework Requisition - Check, Save, and Submit

**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