

Work Instruction

Personal Settings

When to Use

Users are encouraged to use this functionality to ease the creation of a purchase requisition. Personal settings stores user default data which will then be automatically populated to the appropriate fields when creating a purchase requisition. If necessary, the data can be manually overridden during processing.

These settings will remain within the user's profile until they are changed.

Steps

- 1. Update your personal settings by entering the default data in the appropriate fields. (Hint: only complete the fields which will remain constant for all of your purchase requisitions to reduce the possibility of submitting incorrect data or having to override information in a field)
- 2. Save your personal settings.

Note

The SAP input screen for this transaction contains many fields/tabs, **this reference guide will only include information for those fields/tabs that are used in processing UofT transactions**.

Detailed Procedures

Access the transaction using:

Menu	Logistics >> Materials management >> Purchasing >> Purchase Requisition >> Create
Transaction code	ME51N

Screen: Create Purchase Requisition

Purchase requisition Edit Goto Emg	ronment System Help	SAP
S 0 0	C C C C L L L C C C C C C L L C C C C C	
Create Purchase Requisition	n /	
Document overview on	📔 🚰 Personal setting	
Purchase requisition D Header Item overview	Select to access Personal setting screen.	

Basic Settings Tab

Selection timeframe for my docs.	One week	۵
Compile doc. overview automatically		
Environment information		
Envir. Info in new session		
Process messages directly		
✓ Warning messages		
Success messages		
Information messages		
10 Process messages directly		
Conversions		
Display key		
✓ Int. search help on		
Item overview		
Item overview as grid control		

Field Name	Required (R) / Optional (O)	Description of Field Content
Selection time frame for my docs.	0	This field determines the time frame (date range) for displaying your purchase requisitions in the Document overview. The default is for 7 days (one week) but can be changed to display purchase requisitions in any date range from 1 day to all purchase requisitions (i.e. "no restrictions"). Use the pick list button to view the options.
Leave all	other sett	ings as is in this tab.

Leave all other settings as is in this tab.

Click on the Default values tab

	Purchase Requisition	<u>E</u> dit	<u>G</u> oto	Environment	System	<u>H</u> elp		
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1	🖻 Personal Settings							
	Basic settings	Defau	lt value:	s				
	Purch, group				1 L #	dways Propose		
٦	Acct.assig.cat.			1	-	-		-
C	Plant				~	These are the	fields that	
	Stor. location	0)			should be dis	played, if not	
	Material group					select <i>More 11</i> additional fiel	<i>elds</i> to reveal Hs	
	Requisitioner			/				
	Req.tracking no					1		
						/		
	More fields .		P					

Display fields						Hidden fields		
column content	Pos.	Len	Z			Col. content	Lgth.	
Plant	1	4				Document type	4	
Storage location	2	4				Source determination	1	
Acct assignment cat.	3	1			0.0	Item category	1	
Requisitioner	4	12				Deliv. date category	1	
Req. tracking number	5	10				Delivery date	10	
Purchasing group	6	3				MRP controller	3	
Material group	7	9				Purchase order price	1	
						Promotion	10	
				•		Vise arrows to move fiel Hidden fields until the D	os betwee isplay viev ion is com	en <i>Uisplay</i> w is as ab nplete.
Line width		51						
List width		51						

Field Name	Required (R) / Optional (O)	Description of Field Content
Purch. group	R	Use the pick list button to select the appropriate Purchasing group.
Acct assignment cat.	R	Use the pick list button to select either <i>Cost Center</i> or <i>Order</i> s.
Plant	R	Code should be within 1XXX or 2XXX. Use matchcode button to find your Plant code; if a specific one is not available, use general campus code (ie. 1000 for Scarborough Campus, 1500 for Mississauga Campus 2000 for UofT St. George Campus).
Storage location	R	Use matchcode button to find your departmental Storage location .
Material Group	0	Only fill in if you are creating several purchase orders with the same material group, otherwise, leave this

		field blank. Use matchcode button for possible entries (i.e. RADIATION for ALL radioactive purchases).
Requisitioner	о	Only fill in if you are creating several purchase orders for this requisitioner (enter name), otherwise, leave this field blank.
Req. Tracking number	0	This is an open text field that can be used to further track postings. (10 character field similar to the ASSIGNMENT field).
Always propose	N/A	There is no need to select Always propose . The system automatically defaults your settings when you are creating a purchase order.
Save	8	Saves your personal settings.

End of Procedure.