

## 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

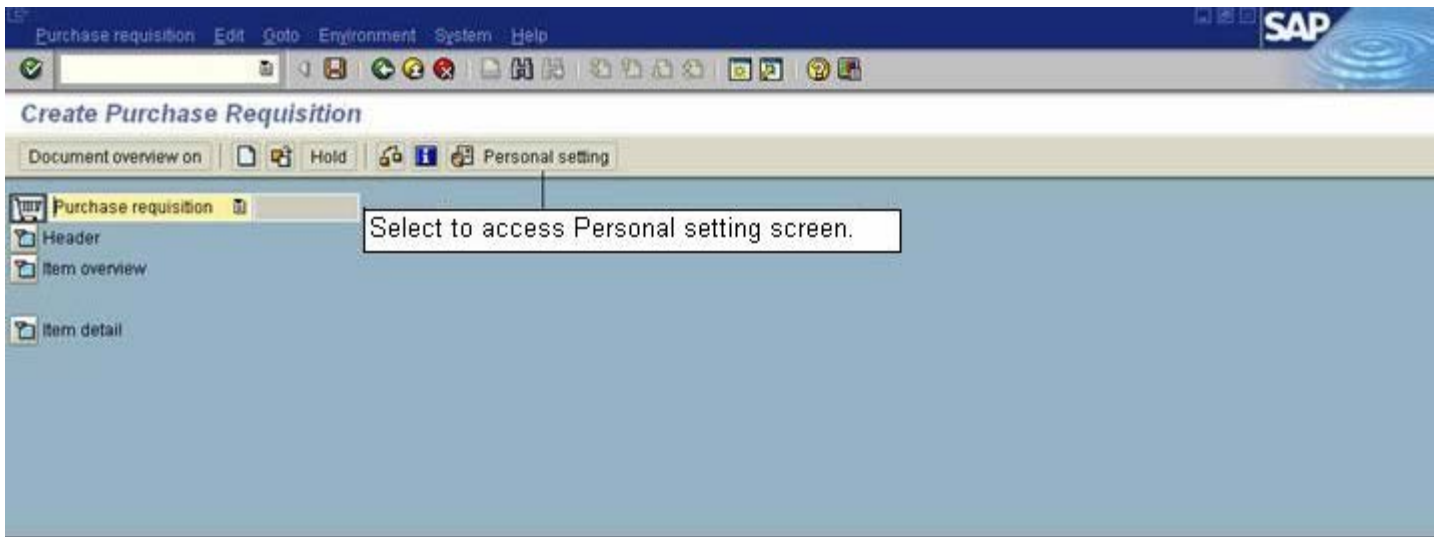
The SAP input screen for this transaction contains many fields/tabs, **this reference guide will only include information for those fields/tabs that are used in processing UofT transactions.**

## Detailed Procedures

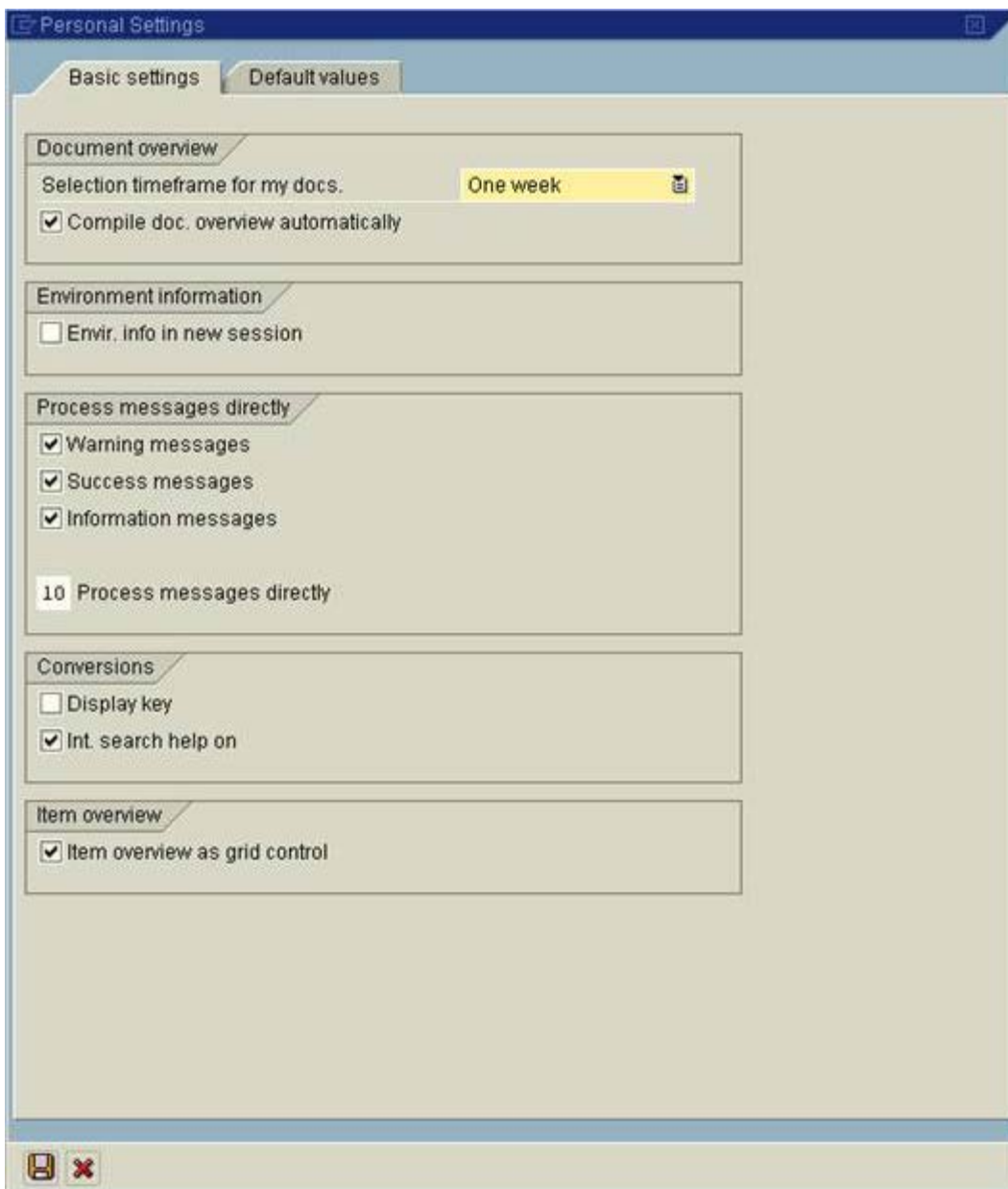
### Access the transaction using:


Menu	<i>Logistics &gt;&gt; Materials management &gt;&gt; Purchasing &gt;&gt; Purchase Requisition &gt;&gt; Create</i>
Transaction code	ME51N

### Screen: Create Purchase Requisition

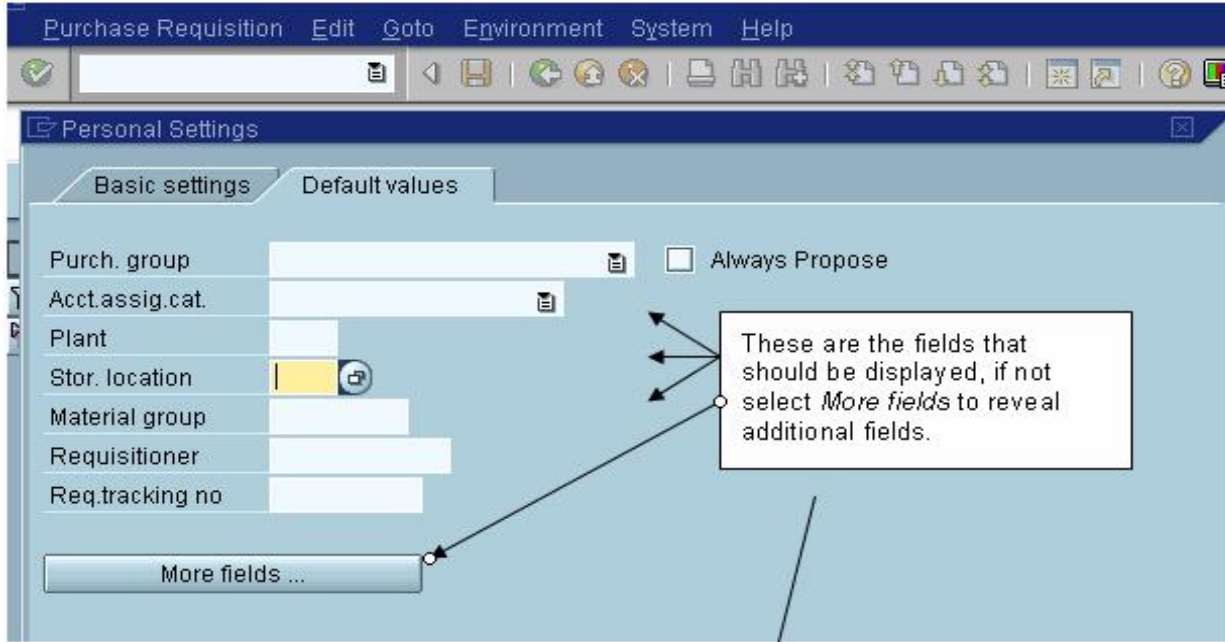


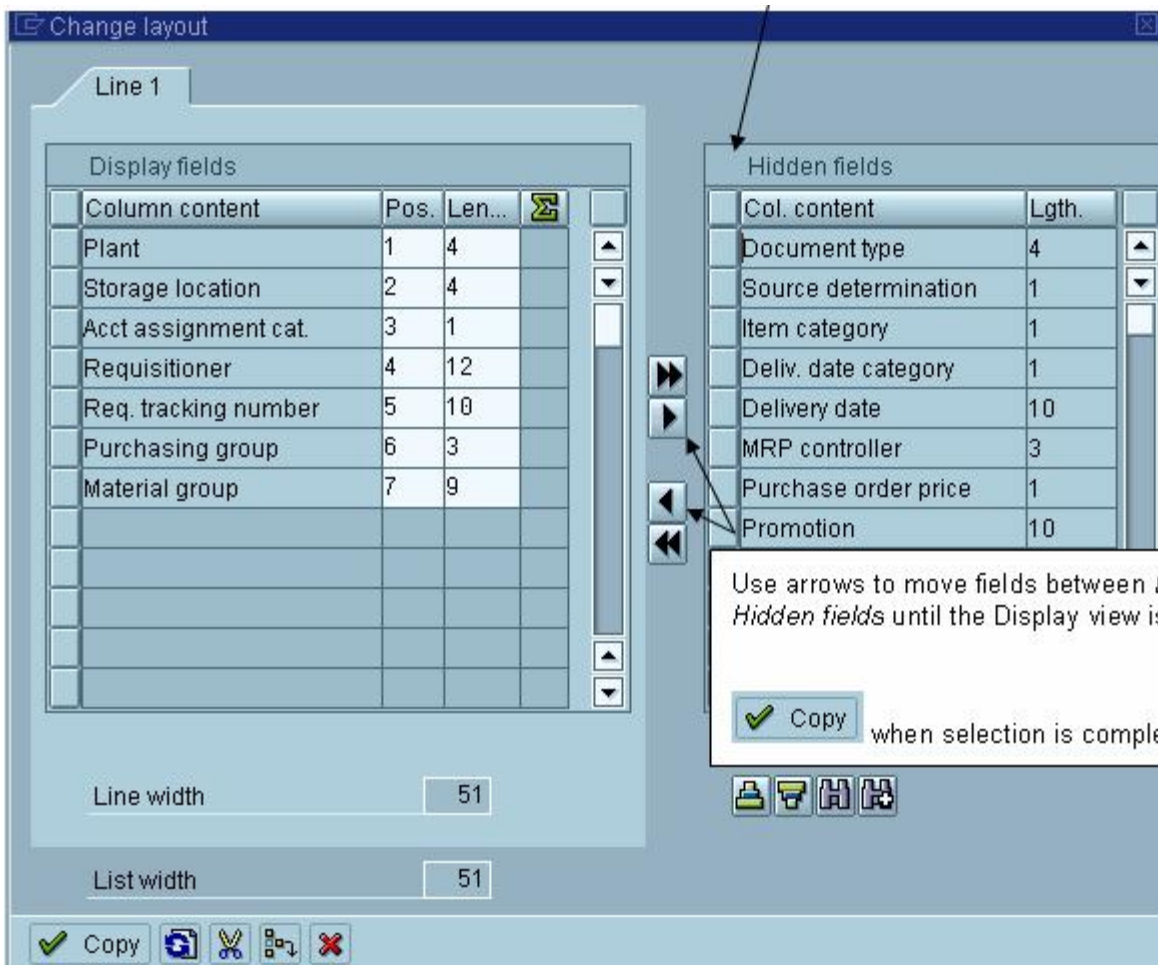
### Basic Settings Tab









Field Name	Required (R) / Optional (O)	Description of Field Content
Selection time frame for my docs.	O	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 settings as is in this tab.		

**Click on the Default values tab**





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 s.</i>
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 <b>Storage location</b> .
Material Group	O	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	O	Only fill in if you are creating several purchase orders for this requisitioner (enter name), otherwise, leave this field blank.
Req. Tracking number	O	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 <b>Always propose</b> . The system automatically defaults your settings when you are creating a purchase order.
Save		Saves your personal settings.

End of Procedure.