

## Work Instruction

# Set Personal Settings

## When to Use

Users are encouraged to use this functionality to ease the creation of a purchase order. Personal settings establish user default data to fields for creating a purchase order (i.e. Purchasing group). These settings remain within the user's profile and are defaulted into the purchase order each time a user begins creating a purchase order. If necessary, users can change the default data entered from personal settings while creating the purchase order.

## Steps

1. Create your personal settings by entering the default data in the appropriate fields. Only complete the fields which will remain constant for your purchase orders.
2. Save your personal settings.

## Note

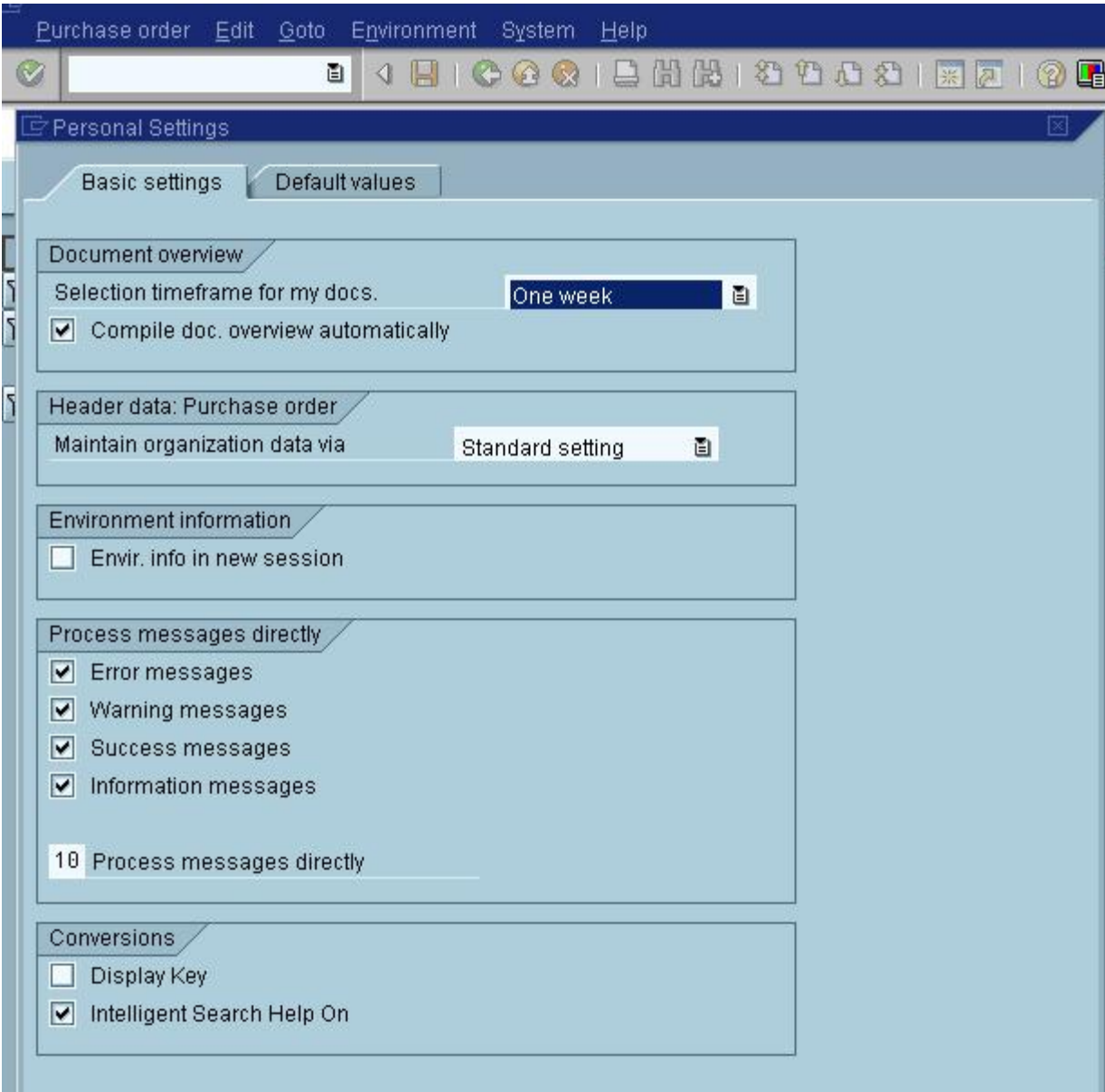
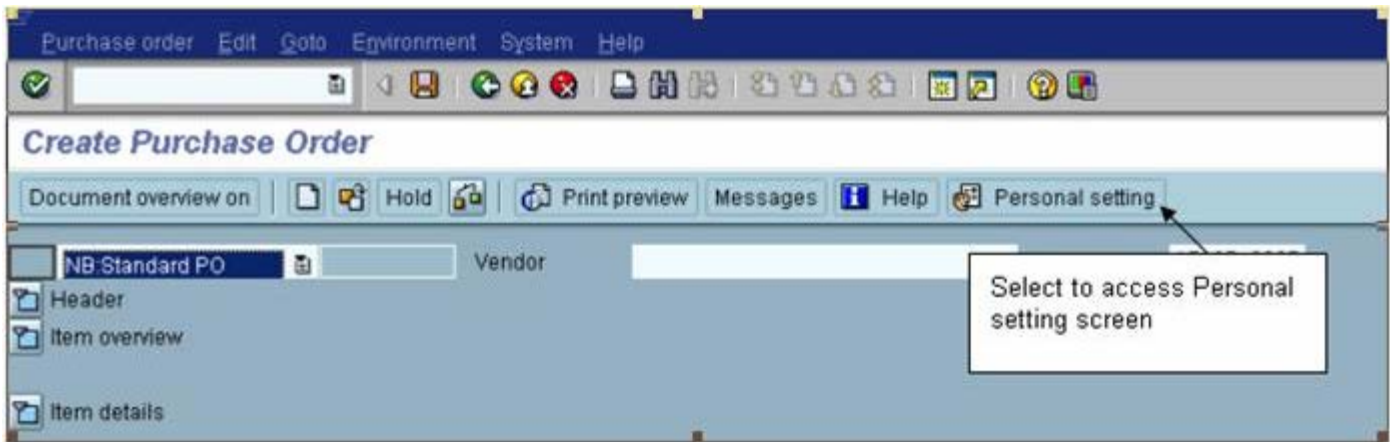
The SAP input screen for this transaction contains many fields/tabs, **this reference guide will only include information for those fields/tabs that are used in processing UofT transactions.**

## Detailed Procedures


### Access the transaction using:

<b>Menu</b>	<i>Logistics &gt;&gt; Materials management &gt;&gt; Purchasing &gt;&gt; Purchase Order &gt;&gt; Create Purchase Order</i>
<b>Transaction code</b>	ME21N

Screen: Create Purchase Order

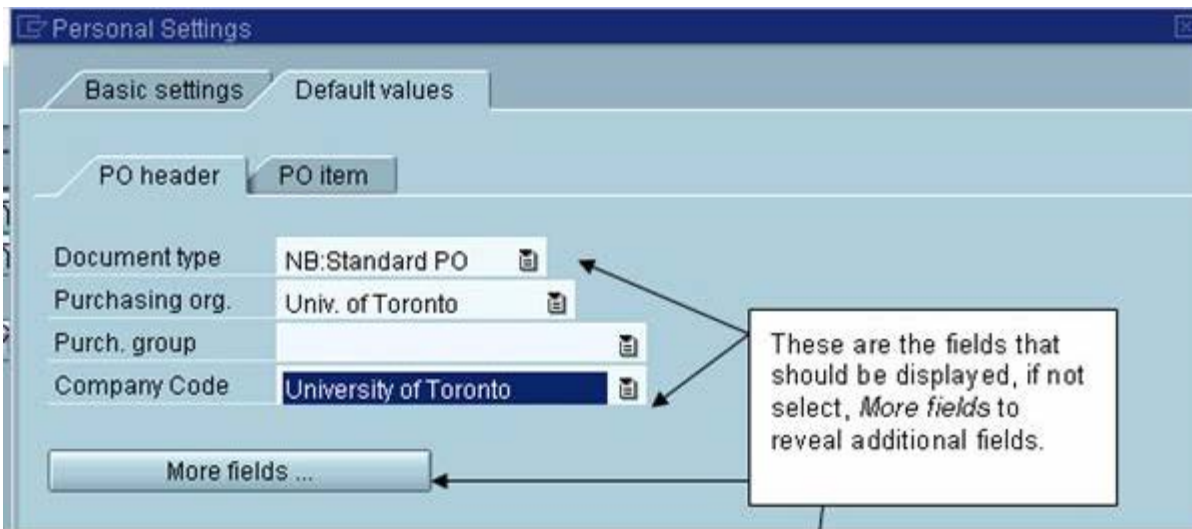


Field Name	Required (R) / Optional (O)	Description of Field Content
		This field determines the time frame (date range) for displaying your purchase orders

Selection time frame for my docs.	O	requisitions in the Document overview. The default is for 7 days (one week) but can be changed to display purchase orders in any date range from 1 day to (i.e. "No restrictions"). Use the pick list matchcode  button to select a time frame.
Leave all other settings as is in this tab.		

Click on the Default values tab (  ).

Click on PO item sub-tab (  ).



Change layout

Line 1

Display fields			
Column content	Pos.	Len...	
Company code	1	4	
Purchasing doc. type	2	4	
Purch. organization	3	4	
Purchasing group	4	3	




Hidden fields	
Col. content	Lgth.
Payment terms	4
Currency	5
GR message	1
Incoterms	3
Incoterms (part 2)	28
Our reference	12

Line width: 20

List width: 20

Use arrows to move fields between *Display fields* and *Hidden fields* until the Display view is as above.

Copy when selection is complete.

Field Name	Required (R) / Optional (O)	Description of Field Content
Document type	O	Defaults to <b>NB Standard PO</b> . Select the document type most commonly processed. Use matchcode  button for possible entries (i.e. Lease orders, Standard PO).
Purchasing org.	R	Enter Univ. of Toronto (1000) or U. of T. - EBP (2000).
Purch. group	R	Enter your Purchasing group. Use matchcode  button for possible entries.
Company Code	R	Enter <b>UOFT</b> for University of Toronto. Use matchcode  button for possible entries (i.e. FLDI for Fields Institute).

Click on PO item sub-tab (  ).

Personal Settings

Basic settings | Default values

PO header | PO item

Item category: Standard  Always Propose

Acct assignment cat.  Always Propose

Delivery date  Always Propose

Plant  Always Propose

Storage location  Always Propose

Material group  Always Propose

Requisitioner  Always Propose

Req. tracking number  Always Propose

Promotion  Always Propose

Acknowledgment reqd  Always Propose

More fields ...

These are the fields that should be displayed, if not select, *More fields* to reveal additional fields.

A screenshot of the SAP Personal Settings interface for PO item settings. The window title is 'Personal Settings'. There are two tabs at the top: 'Basic settings' and 'Default values'. Below these are two sub-tabs: 'PO header' and 'PO item'. The 'PO item' tab is active. The settings are listed in a table-like format. On the right side of each setting is a checkbox labeled 'Always Propose'. Arrows point from a text box at the bottom to the 'Always Propose' checkboxes for 'Delivery date', 'Plant', 'Storage location', 'Material group', 'Requisitioner', 'Req. tracking number', and 'Promotion'. Another arrow points from the text box to the 'More fields ...' button. The text box contains the text: 'These are the fields that should be displayed, if not select, *More fields* to reveal additional fields.'

Do not select **Always propose** . The system automatically defaults settings when creating a purchase order.

Change layout

Line 1

Display fields			
Column content	Pos.	Len...	
Plant	1	4	
Storage location	2	4	
Item category	3	1	
Acct assignment cat.	4	1	
Requisitioner	5	12	
Req. tracking number	6	10	
Material group	7	9	
Promotion	8	10	
Deliv. date category	9	1	
Delivery date	10	10	
Acknowledgment reqd	11	1	





Hidden fields		
Col. content	Lgth.	
Price date	10	
Incoterms	3	
Incoterms (part 2)	28	
Season category	4	
Season year	4	

Line width: 75

List width: 75

Use arrows to move fields between *Display fields* and *Hidden fields* until the Display view is as above.

Copy when selection is complete.

Field Name	Required (R) / Optional (O)	Description of Field Content
Item category	O	Defaults to <b>O Standard</b> . Leave as is.
Acct assignment cat.	O	Use the pick list  button to select either <i>Cost Center</i> or <i>Orders</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	Enter your storage location. Use matchcode  button to find your departmental <b>Storage location</b> .
Material group	O	Enter the material group. Unless you are creating several purchase orders with this material group, leave this field blank. Use matchcode  button for possible entries (i.e. RADIATION for ALL radioactive purchases).

