

Purchase Requisition Checklist

Purchase requisitions can be created any time throughout the year using transaction code ME51N within SAP GUI.

_____ Purchase requisitions can be created any time throughout the year using transaction code ME51N within SAPGUI.

_____ Attend a myNKU – Requisitioning workshop to learn how to enter purchase requisition using ME51N.

_____ Add personal settings to ME51N (this should be a one-time set-up unless your SAP security is changed for any reason. This is normally completed in a myNKU requisitioning workshop.

_____ Before entering a requisition, please know the following information:

- Detailed order information (part numbers, quote numbers, etc.)
- If the requisition is for a payment (utilities, FedEx, or for services already completed) for which the original invoice has been sent to the department, please send original invoice to accounts payable. In the header text of the requisition, please state, “FOR PAYMENT ONLY”.
- Delivery address. If the delivery address is not listed or needs to be changed, email Jeff Strunk, Holly Vasquez, or Sharon Koenig in Procurement Services.
- Vendor name and number. To search for a vendor that may already be created, use transaction code MK03.

_____ If the vendor is not in the master list, use vendor number 102580 (unspecified vendor), and add header comments regarding the use of this vendor. Fill out the vendor set-up form from procurement services website and deliver in person or via fax, email, or interoffice mail to Betty Castle in Procurement Services. It is imperative that the department chair/director sign the form for expedited processing. Please add in header comments of the requisition that the form has been submitted to procurement services. When creating requisitions, do not use vendor numbers that begin with “AP” or vendor #'s that include “blocked” in the name.

_____ On the short text line of the requisition, please be as detailed as possible. More detail can also be included in the header text of the requisition. For example, when ordering computer equipment or medical supplies, please include a detailed description, along with part and serial numbers etc. Please include quote #'s or information in the header text and attach a copy of the quote.

_____ Attach your quotes or other hardcopy order information to the requisition in SAP. Purchase orders are often delayed when Purchasing has to call the department for quotes or wait for hardcopy quotes to arrive.

_____ Complete the purchase requisition and save.

_____ A release strategy is created if the line item is over \$1000 or if a grant cost center is used. The requisition workflows to the responsible person on the cost center(s) or the Principle Investigator (PI) and Grants Accounting office for grant cost centers.

_____ If the requisition is placed on hold until a budget transfer is completed to cover the cost of the item(s), the requisitioner needs to use transaction code ME52N and remove the hold to complete processing of the requisition. The requisition, even when placed on hold, still workflows to the person responsible on the cost center, but cannot be released until it is taken off hold.

_____ Procurement services will create the purchase order. The purchase order number will appear under the STATUS tab of the requisition, once it is created. The STATUS tab is located on the item detail (last section) of the purchase requisition page. Please monitor the STATUS tab to make sure your requisitions are released and PO's are created.

_____ As a general rule, if the purchase order begins with a "45", then enter a goods receipt using transaction code, MIGO_GR when the items are received.

_____ Continue to monitor the progress of the purchase order using the PURCHASE ORDER HISTORY tab. Once the goods receipt and invoicing have been completed, the goods receipt number and invoice number will appear on the purchase order history tab, located on the item detail (last section) of the purchase order page. You can also use transaction code ZME2K to monitor the goods receiving and invoicing status of your purchase orders.