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Overview of SAP Requisition/Purchase Order Document Types:

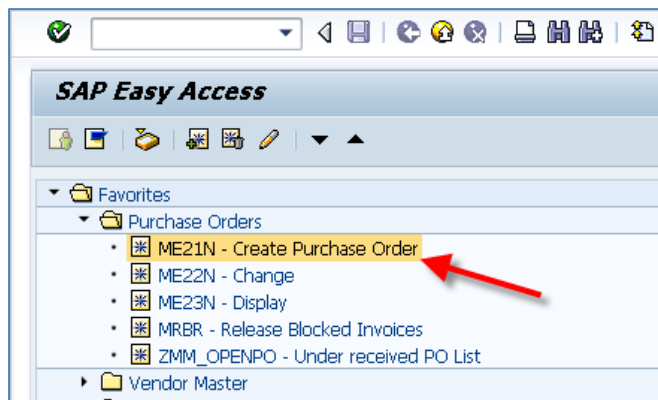
NB: Used by hospital areas for purchases typically not related to direct patient care

ZB: Used by hospital areas for purchases typically related to direct patient care

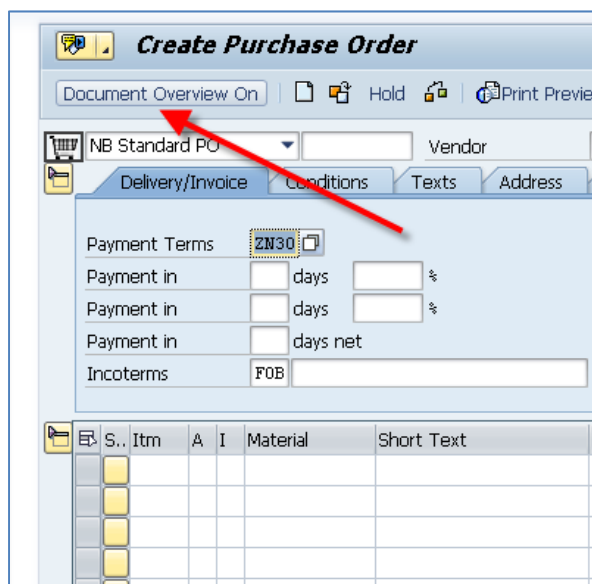
Note: Consult the NB/YB Matrix on the Hospital Purchasing webpage for more information at: <http://www.uky.edu/Purchasing/docs/zbnbmatrix.pdf>

YB: Used by Facilities (PPD/Stores) areas that purchase goods and services as part of the Plant Maintenance (PM) module.

Begin at T-code ME21N

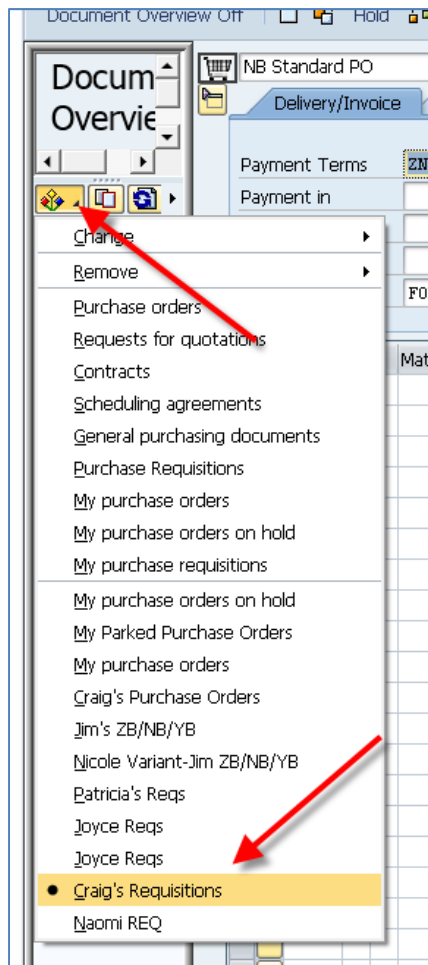


If needed click Document Overview On to open left document pane



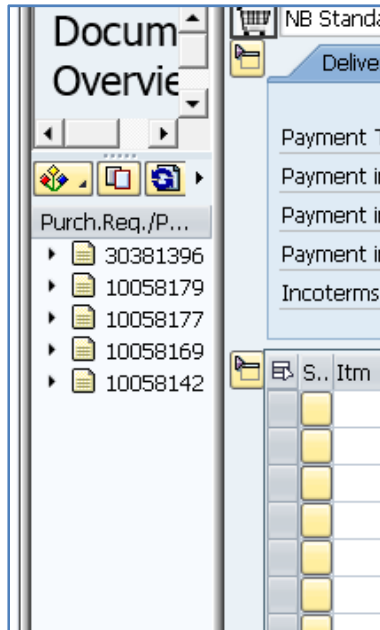
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Each buyer has a “Variant” – a mechanism that pulls requisitions assigned to them only. Buyers can also pull requisitions from other Buyers’ variants if needed.

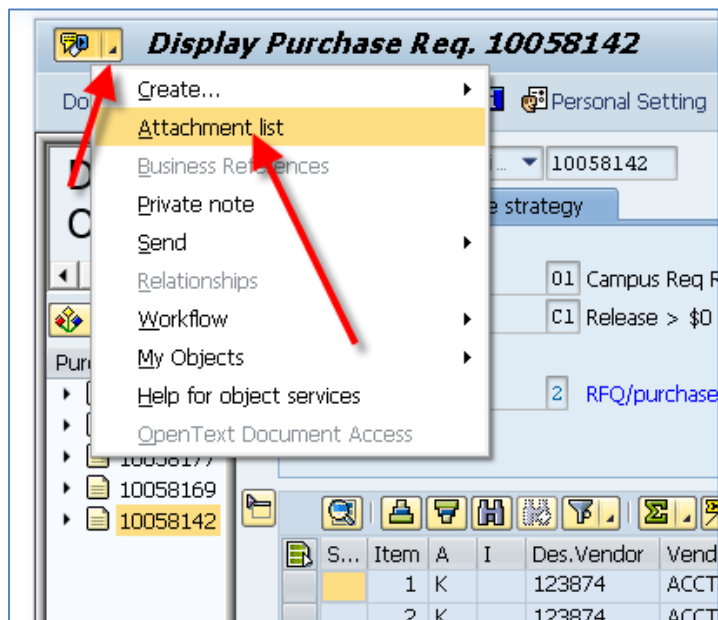


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After the variant loads, requisitions ready for processing will appear in Document Overview window.

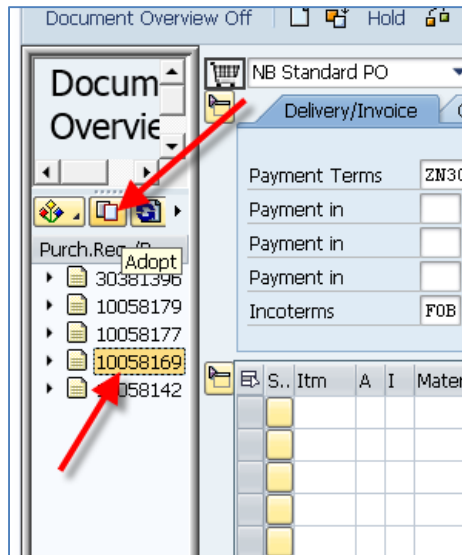


Double click the requisition to display contents. You can also pull quotes or other attachments from requisitions using the Services for Object icon.



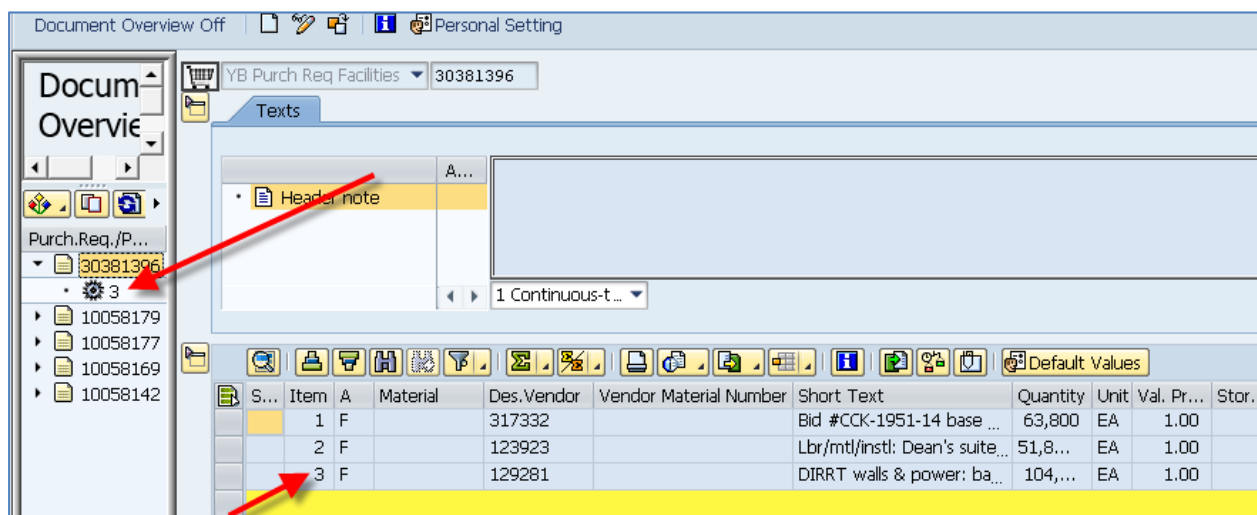
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When ready to process requisition to a purchase order, start with a fresh (blank) ME21N screen. Highlight the requisition and click the Adopt icon. You can alternatively drag the requisition to the Shopping Cart icon.



Note: For some requisitions, the Buyer may only be assigned specific line items. For multiple line requisitions, the buyer can also select which lines to pull, if desired, by highlighting those lines only within Document Overview.

Example 1: Some orders (usually 3000 requisitions) have multiple lines, some of which are logged to other Buyers. In this case, only line 3 is logged to a given buyer and that is the only line that will move to the PO screen.



Example 2: If you only want to process line item 1 to a PO, highlight only that line item and click Adopt.

The screenshot displays the SAP Release Strategy Configuration interface. On the left, the 'Docum Overview' pane shows a tree of release indicators, with indicator 2 selected. The main area shows the configuration for Release Indicator 2, including Release group (01 Campus Req Release), Release Strategy (C1 Release > \$0 - \$10K), and Release Indicator (2 RFQ/purchase order). The bottom table shows the release strategy configuration for Release Indicator 2, with columns S..., Item, A, Des. Vendor, I, Vendor Material Number, Short Text, Quantity, Unit, Val. Pr..., and Σ.

S...	Item	A	Des. Vendor	I	Vendor Material Number	Short Text	Quantity	Unit	Val. Pr...	Σ
	1	K	123874		ACCT 36611 INV 1230...	KCH PATIENT GUIDE CO...	1	EA	2,01...	
	2	K	123874		ACCT 36611 INV 1230...	KCH PATIENT GUIDE TE...	1	EA	3,59...	

The initial purchase order adopts information from the requisition, appearing similar to below:

[illegible]

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Confirm vendor selected is correct. The PO vendor address must match address on the quote. If vendor is not matched correctly, perform vendor search to assign correct vendor.

Purchase Order

Off | Hold | Print Preview | Messages | Personal Setting

NB Standard PO | Vendor: 195927 Hindman Broadcasting Corp. | Loc. date: 06/05/2014

Delivery/Invoice | Conditions | Texts | Address | Communication | Partners | Additional Data | Org. Data | Status

House no./street: | City/State/ZIP Code: Hindman 41822 | Country: US United States | Telephone: 606-785-3129 | Extension: | Fax: | Extension: |

Address details

Item	Material	Short Text	PO Quantity	Deliv. Date	Net Price	Curr	Per

Set the PO Document type:

- If pulling a 1000 requisition, set PO document type to NB
- If pulling a 2000 requisition, set PO document type to ZB
- If pulling a 3000 requisition, set PO document type to YB

Create Purchase Order

Document Overview Off | Hold | Print Preview | Messages

Document type: NB Standard PO | Vendor: | Conditions | Texts | Address

FO Framework order
FOPO Framework order SRM
NB Standard PO
NBPO Standard PO SRM
PSPO Personal Service PO
YB Std PO Facilities
ZB PO Healthcare
ZO Subawards FO
ZOPO Subawards FO SRM

Days: | Days: | Days net: | Destination PPY and Allowed: |

Item	Material	Short Text
1	K	Radio Spots

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Set terms as to whether a freight charge applies. This can only be Prepay and Add (if there is an additional freight charge involved) or Prepay and Allowed– if there is not a separate freight charge involved.

Note: Hospital purchase orders use only FRE – Pay Freight or NFR – Do Not Pay Freight

The screenshot shows the SAP Purchase Order form for 'NB Standard PO'. The 'Delivery/Invoice' tab is selected. The 'Incoterms' field is set to 'FOB Destination PPY and Allowed'. Other fields include 'Payment Terms' (2N30), 'Payment in' (30 days), and 'Currency'.

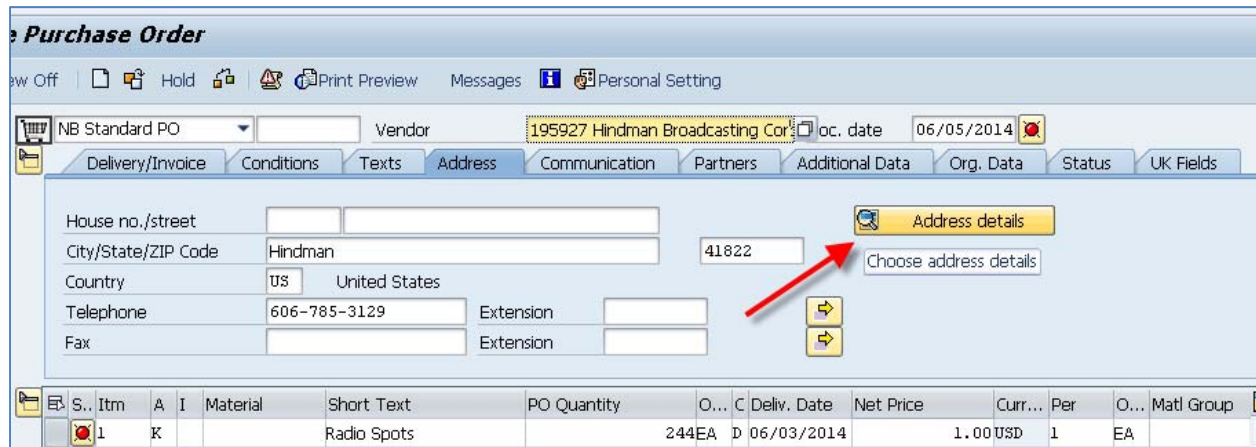
Header text: Free hand any text that might need to be conveyed to the vendor such as quote number, job name, special order details, rush order, etc. This will print on the PO to the vendor.

The screenshot shows the 'Header Texts' section of the SAP Purchase Order form. The 'Header note' option is selected, and a red arrow points to it. The 'Header text' option is also visible. The 'Pricing types' and 'Deadlines' options are also listed. The '1 Continuous-t...' dropdown is visible at the bottom.

You can also place internal notes if needed under "Header Note". This does not print on the PO.

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Set the transmit method. Click Address Details:



The screenshot shows the SAP Purchase Order form with the 'Address' tab selected. The form includes fields for House no./street, City/State/ZIP Code, Country, Telephone, and Fax. A red arrow points to the 'Address details' button, which is located next to the 'Choose address details' button. The 'Address details' button is highlighted in yellow.

S.	Itm	A	I	Material	Short Text	PO Quantity	O...	C	Deliv. Date	Net Price	Curr...	Per	O...	Matl Group
1	K				Radio Spots	244EA	D		06/03/2014	1.00 USD	1	EA		

Transmission method operates based on an If/Then sequence:

- If there is a fax number on the vendor record, PO will automatically fax.
- If there is no fax number, but an email address, PO will email.
- If both fax number and email spaces are empty, PO will email to the buyer through Outlook.

Note: Many vendors within hospital, and a minor number within Central Purchasing, transmit based on Electronic Data Interchange (EDI). POs for these vendors transmit via EDI automatically and supersede any transmit options Buyer may select on the purchase order.

Vendor Address

Name
Title
Name: Hindman Broadcasting Corp
WKCB-FM

Search Terms
Search term 1/2: WKCB FM

Street Address
House no./street
City/State/ZIP Code: Hindman KY 41822
Country: US United States Kentucky
Time zone: EST Jurisdict. code

PO Box Address
PO Box: 864
Postal Code
Company Postal Code

Communication
Language: EN English
Telephone: 606-785-3129 Extension
Mobile Phone
Fax: 859-247-9848 Extension
E-Mail: sales@hindmanbroadcast.com
Standard Comm.Method
Data line
Telebox

Comments

Buttons: Preview, International Versions

Check/confirm Buyer assignment. If you are pulling the req from your queue, it automatically sets you as the Buyer on the PO. If you are pulling this from another Buyer's queue, you may need to set the Purchasing Group to your own number. Confirm if correct; change as necessary.

NB Standard PO Vendor: 195927 Hindman Broadcasting C... Doc. date: 06/05/2014

Delivery/Invoice Conditions Texts Address Communication Partners Additional Data **Org. Data** Status UK Fi

Purch. Org.: UK00 UK Purchasing
Purch. Group: 025 Craig Locke
Company Code: UK00 University of Kentucky

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15. Move to bottom line item detail section

If item has any type of catalog or product number, insert into Vendor Material Number cell. Otherwise, leave blank. If multiple line item purchase order, navigate among lines as needed to make entries.

The screenshot shows the SAP Material Data tab for item 1 [1] Radio Spots. The interface includes a toolbar with icons for various functions and buttons for 'Default Values' and 'Add Planning'. The 'Material Data' tab is active, showing fields for Material group, Vendor mat. no., Vendor sub-range, EAN/UPC, Vendor Batch, and InfoUpdate. Red arrows point to the Material group field, the Vendor mat. no. field, and the Delivery tab.

Navigate to Account Assignment tab. Review GL Account. If capital equipment (over \$5000 per item), GL must start with 55XXXX. Otherwise, no changes are needed.

The screenshot shows the SAP Account Assignment tab for item 1 [1] Radio Spots. The interface includes a toolbar with icons for various functions and buttons for 'AccAssCat', 'Cost center', 'Distribution', 'Single account assignm...', and 'CoCode'. The 'Account Assignment' tab is active, showing fields for Unloading Point, G/L Account, Business Area, CO Area, Cost Center, Order, Fund, Functional Area, Funds Center, Earmarked Funds, Recipient, Grant, and Commitment Item. Red arrows point to the G/L Account field and the Account Assignment tab.

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Line item text tab: If desired, insert text here that may be applicable to the line items (e.g., additional item description, special item details, etc.). This will print on the purchase order beneath the line item.

1 [1] Radio Spots

Quantities/Weights | Delivery Schedule | Delivery | Invoice | Conditions | Account Assignment | **Texts** | Delivery Address

Texts | A... | xxxxxxxxxxxxxxxxxxxx

Item text
Info record PO text
Material PO text
Delivery text
Info record note

Delivery address tab: Confirm delivery address is correct and complete. Some departments have a preset address identified by a number. Requisitioners for other areas may free hand the delivery address. If there are multiple lines on the PO, click Repeat Address button on line item 1 to repeat for all lines.

Item 1 [1] Radio Spots

Delivery Schedule | Delivery | Invoice | Conditions | Account Assignment | Texts | **Delivery Address** | Confirmations

Title: []
Name: UK HealthCare Marketing
House no./street: 2333 Alumni Park Plaza Ste 300
District: []
City/State/ZIP Code: Lexington KY 40517-4290
Country: US United States Kentucky

Address details
Reset address
Repeat address on

Address: 1263636
Vendor: [] SC vend

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Click Print Preview button at the top. Review hardcopy preview for issues or items that need corrected. Click yellow button at top to return to screen.

te Purchase Order

view Off | **Print Preview** | Messages | | Personal Setting

NB Standard PO | Vendor: 195927 Hindman Broadcasting C... | Doc. date

Delivery/Invoice | Conditions | Texts | Address | Communication | Partners | Additional D

Header Texts

- Header text ☒
- Header note
- Pricing types
- Deadlines

Departmental contact: Jim Smith

Quote number 49498

1 Continuous-t...

S...	Itm	O...	C	Deliv. Date	Net Price	Curr...	Per	O...	Matl Group	Plnt	Sto
1	EA	D	06/03/2014		1.00 USD		1	EA		00	
						USD					
						USD					

Text | Edit | Goto | Extras | System | Help

Print Preview of RIGHT FAX Page 00001 of 00001

UKPurchEmail clocke@email.uky.edu
User ID CLOCKE
PO Date: 06/05/2014
PO Number: Hosp Bill To:
Vendor Number: 195927

Page 1 of 1

Purchase Order

Vendor: Hindman Broadcasting Corp
WKCB-FM
P.O. Box 864
Hindman KY 41822

Ship To: University of Kentucky
UK HealthCare Marketing
2333 Alumni Park Plaza Ste 300
Lexington KY 40517-4290
Phone: 859-323-2887

Information: Purchasing Contact:
Email: clocke@email...
Phone: 859-257-2964
Fax: 859-257-1951
Payment Terms: Net
Shipping Terms: FOB

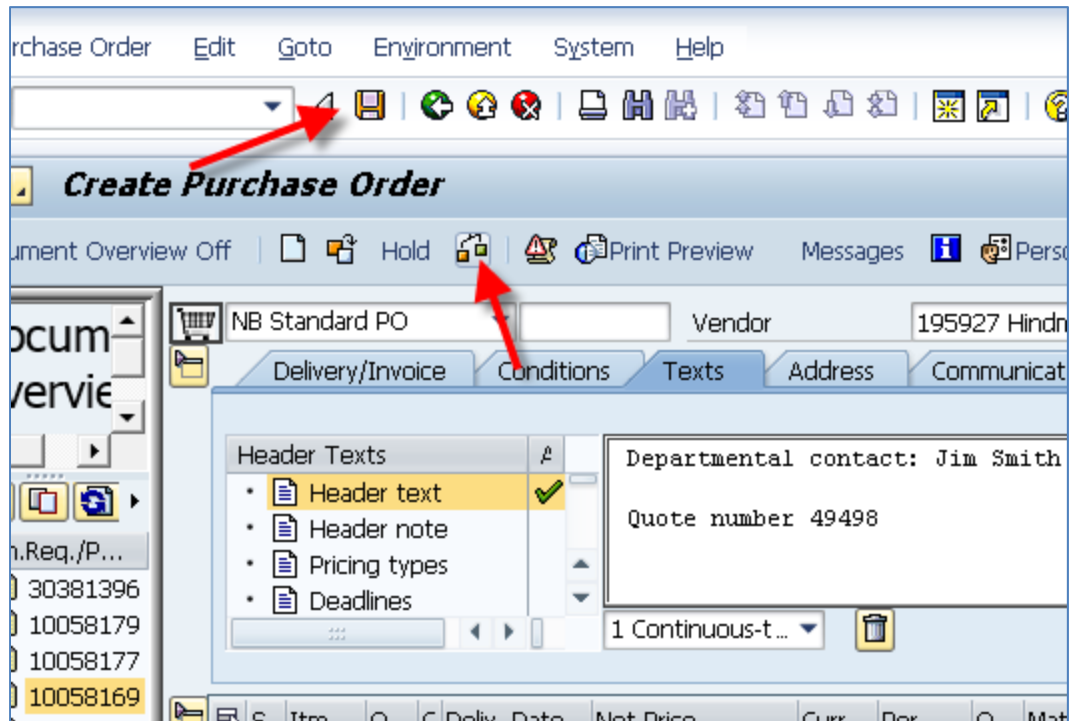
Departmental contact: Jim Smith

Quote number 49498

001 244 EA Radio Spots

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Click Check button to confirm no errors. Click Save icon to finish and process.



If you selected FAX or Email as transmit type, PO automatically delivers to destination.

If you cleared both, it emails to you as the Buyer. Exception: EDI vendors place electronically and automatically regardless of Buyer settings.

If there problems while creating a PO, you can leave it at any time using the yellow or green buttons at the top to exit and start over.

If needed, there is also a Hold button that can be used to place the order on hold to finish later. A Held PO does not transmit to the vendor.