

## Portal PR Creation

- New feature on the portal – Create, Change, and Display a Requisition.
  - Piloted and tested with many users from several PASSHE universities
    - *Counterman and Beishline at BU*
  - All current BU requisitioners have been provided this capability by SAP Support Team.
  - Requisitioners require a role (Z:xx:MM:RQSTNR) in SAP to use this feature.
- What are the benefits of using the portal vs. SAP R/3?
  - Easier navigation and easier to follow
  - Only the fields you need are on the screen
  - Limited values to choose from in drop down lists (i.e. UOM)
  - Can access the link anywhere you have internet access and do not need the SAP gui launch pad on the PC.
  - Do not always have to use the portal. An optional way to create, change and display a requisition. Always have both options (portal and SAP R/3) available.

## Portal PR Creation cont'd

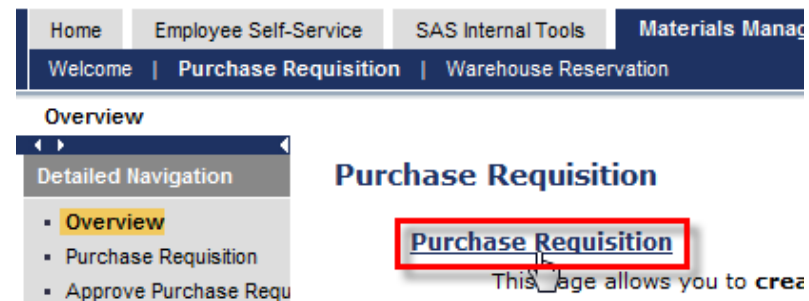
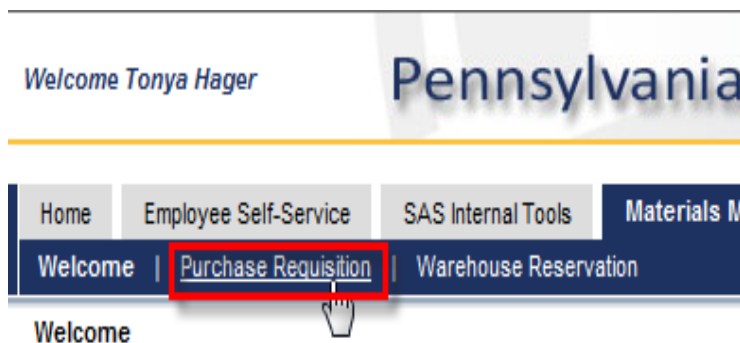
Logon to the ESS Portal website: <https://portal.passhe.edu>

Click on the “Materials Management” tab as shown below:



Note: The ESS portal screen above will vary user to user based on SAP/Portal authorizations. If the “Materials Management” tab is not displayed, contact the Procurement Department.

Click on “Purchase Requisition” links as shown below and proceed:



## Portal PR Creation cont'd

Notes: Attachments can be added in create/change. If in create, you must save the requisition first and then select a line to get the attachment tab to appear.

Purchase Req # (Assigned by SAP): 0010362281

Header Note:

Line	Short Text	Delivery Date	Quar
1	Testing PR Attachments	12/31/2012	

Line Details: Attachments

The are no documents attached to this requisition.

Attach New Document

Attach Document to Requisition

This feature will allow you to attach a document to this requisition that will be accessible by anyone who views this requisition. Enter the path of the file to attach, or use the browse button, then click the "Attach" button.

File to Upload: C:\Users\190thager\Desktop\SAPtable Browse...

Attach File to Requisition Cancel Adding Attachment

- Once saved on the portal, the requisition is immediately created in SAP.
- The portal uses the same security roles assigned in SAP.
- When creating a new requisition, you will not see the release strategy tab (if applicable) until you save the line.
- The portal will pull in defaults or "parameter ids" for the requisition.
- For a multiple line requisition, select the appropriate line to see the line item details.

Line	Short
1	Testing

Add New Line

## Portal PR Creation cont'd

- Copying lines - Create the first line and “save item” to the requisition. When selecting the line (see red box), provided with the “Copy Line to New Line”:

**Requisition Items**

Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total
1	testing	12/31/2011	1	EA	\$1.23 / 1	\$1.23

**Line Details**

General Account Assignment Texts Release and Status Delivery Address

Acct. Assign. Cat.: K -- Cost Center Distribution: Single Account Assignment

Unloading Point: testup Recipient: test gr

GL Account: 660100 Office Supplies

Cost Center: 9011100000 Executive Office

Fund: 9011100000

Funds Center: 9011100000

Functional Area: 6000

Earmarked Funds:

**Copy Line to New Line** Edit Selected Item Delete Selected Item

*Note: At this time, can only copy one line at a time. Cannot select 4 lines and create 4 new lines as in SAP.*

*Copying brings everything from line 1 to the “new line” and changes can be made before “saving” the line to the requisition. Below the short text, quantity and price were changed.*

Requisition Items						
Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total
1	testing	12/31/2011	1	EA	\$1.23 / 1	\$1.23
2	testing - copy of line 1	12/31/2011	2	EA	\$2.44 / 1	\$4.88
<b>Total Purchase Requisition Price: \$6.11</b>						

## Portal PR Creation cont'd

Copying a PR - Have capability to create a new requisition by copying an existing requisition:

Select “Copy an Existing Requisition” and enter the requisition number or search if not known.

The screenshot shows a web interface titled "Purchase Requisition" in a yellow header. Below the header, a blue box contains the text "Select an option and click 'Continue'". There are four radio button options: "Create New Requisition", "Copy an Existing Requisition" (which is selected and highlighted with a red box), "Change an Existing Requisition", and "Display an Existing Requisition". Below these options is a text input field labeled "Purchase Req #" with a search icon to its right, also highlighted with a red box. At the bottom left of the form is a "Continue" button with a right-pointing arrow.

Multiple Account Assignment: Able to create a requisition with multiple account assignment or even mixed (using the X). In change mode, cannot change a single account assignment to a multiple account assignment on the portal.

# Material Group Search

By clicking the drop down or search box, the pop-up window will display. Enter the description in the search box as shown and then click 'search'.

**Material Group Search**  
 Enter the all or part of the description, or number, in the boxes below. Then click on the search button to load all matching results.

Description:

Material Group Number:

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**Requisition Items**

Line	Short Text
<input type="button" value="Add New Line"/>	

**Line Details**

**General** | Account Assignment | Texts | Delivery Address

Purchasing Group: 904 -- Robert Gross

Short Text: text

Material Group:

Quantity: 0 Each (EA)

Unit Price:  / 1 Each (EA)

Delivery Date: 5/14/2012

Desired Vendor:

[Vendor Listing \(ZM08\)](#)

Goods Receipt  
 Invoice Receipt

Requisitioner:

Tracking Number:

### Scenario 1:

Displayed is the “results” screen when searching for ‘office.’ It is simply a list of all Material Groups with the word ‘office’ in the description.

**Material Group Search**

Enter the all or part of the description, or number, in the boxes below. Then click on the search button to load all matching results.

Description:

Material Group Number:

**Clicking Search  
Generates the list below**

Material Group Number	Description
00148	OFFICE SUPPLIES
00156	PAPER-OFFICE_PRINTING
00668	RENTAL_LEASE-OFFICE EQUIPMENT
00876	SERVICES-OFFICE EQUIPMENT REPAIR

**Scenario 2:**

When doing an “empty” search, the full list of Material Groups is displayed and is sorted by description, not by number.

This is used when the Requisitioner does not know what group to search for. The list is ordered by the description.

**Material Group Search**

Enter the all or part of the description, or number, in the boxes below. Then click on the search button to load all matching results.

Description:

Material Group Number:

**Empty search**

Material Group Number	Description
00300	AGRICULTURE
00308	ANIMALS_ANIMAL SUPPLIES
00548	APPAREL_UNIFORMS_FOOTWEAR
00292	BARRELS_DRUMS_KEGS
00572	CHEMICALS_SOLVENTS
00260	COMPUTER HARDWARE
00252	COMPUTER SOFTWARE-SUPPORT_MAINT
00228	CONFERENCE ROOM_MATERIALS
00708	CONSTRUCTION-ELECTRICAL
00716	CONSTRUCTION-GENERAL

Row 1 of 109

**Complete list of Material Groups Sorted by Description**



## Portal PR Creation (Roles and Questions)

Any user with the SAP role = Z:10:MM:RQSTNR now has access to “Create a Requisition” on the portal. FAQ:

- What if a user does not have the MM Tab?

Ask IT Department to add that user (SAP Id) to Active Directory Folder: BUP-WEB-MM-REQUISITIONERS.

- What if a user gets a message they are not authorized to use this transaction?

Check with security team to make sure they have the SAP role - Z:10:MM:RQSTNR.

- How does a new user get added to the appropriate portal folder?

When BU security team adds a user to the SAP role - Z:10:MM:RQSTNR, they should be added to the AD folder - BUP-WEB-MM-REQUISTIONERS as well.