Purchase Requisition (DUHS Only)

An SAP Purchase Requisition document is created electronically by a department (purchasing group) to request the purchase of goods or services. The approvals for the requisition are also done electronically. Once all approvals are obtained, the requisition is changed into a Purchase Order and sent to the vendor. The process of changing a Requisition into a Purchase Order is done automatically if certain criteria are met, or manually by Procurement if needed.

Note: Requisitions are created directly in SAP by those belonging to the Hospital company codes and others belonging to Health System Company Codes. Requisitions, known as shopping carts, are created in Buy@Duke by those belonging to University Company Codes (such as Company Code 0010). This section of the guide pertains to requisitions created directly in SAP.

Purchase Requisition Types

<table>
<thead>
<tr>
<th>Type</th>
<th>Document Reference no. begins with:</th>
<th>Brief Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NB</td>
<td>100xxxxxxx</td>
<td>Regular or “normal business”</td>
</tr>
<tr>
<td>RSU</td>
<td>200xxxxxxx</td>
<td>Re-supply</td>
</tr>
<tr>
<td>SH</td>
<td>400xxxxxxx</td>
<td>Special handling</td>
</tr>
<tr>
<td>MRP</td>
<td>500xxxxxxx</td>
<td>Central inventory</td>
</tr>
<tr>
<td>PDAD</td>
<td>700xxxxxxx</td>
<td>Computer generated for cart inventory</td>
</tr>
<tr>
<td>BOP</td>
<td>8xxxxxxx</td>
<td>Bill Only / Confirming Order (Do not ship) mostly used for consignment items</td>
</tr>
</tbody>
</table>
Display a Purchase Requisition (Document Number is Known)

1. Via the User Menu: Purchasing → Display Purchase Requistion

2. On the Display: Purchase Requisition Initial Screen, enter the document number in the Purchase requisition field.

3. Click on the Item Overview button to display the Display: Purchase Requisition: Item Overview screen.

Display a List of Purchase Requisitions (Document Number is Not Known)

1. Via the User Menu: Purchasing → Purchasing Documents List Display → Requisitions by Account Assignment

2. On the List Display of Purchase Requisitions screen, enter the cost center or range of cost centers or a WBS Element or range of WBS Elements as needed to find a requisition.

   Note: Date/s can also be used as additional criteria for narrowing a search. If these initial criteria don’t work, try removing excess criteria like Plant and/or Purchasing group. Also, the check boxes at the bottom of the initial screen can ALL be checked to view ALL requisitions.

3. Click on the Execute button (F8) to display the Purchase Requisitions per Account Assignment screen.

4. From the resulting list, double click on the desired Requisition number to display the screens for that requisition.

5. When ready, click on the Back button to exit the transaction.
Display a Purchase Requisition from a Referencing Purchase Order

1. From the *Display Purchase Order: Document Overview* screen, follow the menu path: *Environment > Purchase Requisition*.

2. Click on the Back button to return to Item Overview screen.

Display a Purchase Requisition from a Commitment on a Report

1. **Double click** on the commitment line item for a Requisition.
   - If a line item for a Purchase Requisition contains a positive dollar amount, the Purchase Requisition is considered *open* and has **NOT** been converted to a Purchase Order document as of yet.
   - If a line item for a Purchase Requisition contains a zero dollar amount, the Purchase Requisition is considered *closed* and **HAS** changed to a Purchase Order (which may already have a Goods Receipt or Invoice document entered into SAP and also be closed / zero amount).

   *Note:* These zero dollar line items will appear on a commitment line item report from the drill-down of a summary report. The zeros can be eliminated when executing a Commitment Line Item report by clicking on the “Open items only” box on the initial selection screen before executing the report.

2. Click on the Back button to return to report when ready.
Examples of Purchase Requisition Document (NB or RSU):

The examples below show Display: Purchase Requisition: Item Overview screens with short text line items and material line items (materials).

Note: When drilling down from a report into the Purchase Order, use the line item number listed in a column on the report to locate the corresponding line item listed in the Item column on the Purchase Order.

Key Pieces of Information

1. The item number for reference
2. An SAP material number if this item was ordered from materials listed in SAP (primarily used by Hospitals/Health System).
3. Either the short text description corresponding to a material number OR a description of the item (with no material number in SAP) as entered on the requisition.
4. The Purchase order quantity, unit of measure, and delivery date.
View the Details of a Line Item, like the Price per Item
From the Purchase Requisition document (Display: Purchase Requisition: Item Overview screen):

1. Click once in the box to the left of the line item to select.
2. Click on the Item Details button.
3. On the Display: Purchase Requisition: Item ##### screen, review the fields of information, such as the Val. (Valuated) Price field.
4. Click on the Back button or the Overview button to return to the Item Overview screen.

Note: The Overview button for requisitions looks different than the Overview button for Purchase Orders.
See if this Line Item is Subject to Release

From the Purchase Requisition document (*Display: Purchase Requisition: Item Overview* screen):

1. Click once in the box to the left of the line item to select.
2. Click on the Release Strategy button.
3. Review the release strategy, release codes needed and obtained, and the release status (example: Z Fully released for PO or bid).
   
   *Note: If no release strategy is required for this item, a message states that the item is not covered by a release strategy.*

4. Click on the Continue button to return to Item Overview screen.
Find Who Created the Purchase Requisition

From the Purchase Requisition document (Display: Purchase Requisition: Item Overview screen):

1. Click once in the box to the left of the line item to select.
2. Click on the General button.
4. Click on the Back button or the Overview button to return to the Item Overview screen.

Note: IF NEEDED, use transaction code ZTCD to look up the identity of a user per the User ID that is listed in the Created by field. On the ZTCD screen, enter the User ID and click on the Execute button. The name will be listed on the next screen.
See the Accounts Charged, Delivery Location, and Goods Recipient

From the Purchase Requisition document (*Display: Purchase Requisition: Item Overview* screen):

1. Click once in the **box to the left of the line item** to select.
2. Click on the **Account Assignments** button.
   
   *Note: If more than one line was selected, click on the ✅ Continue button to move to the next line’s information.*

3. On the **Account Assignment for Item ####** screen, review the fields below as needed:
   
   - **Cost Center** or **WBS Element** = identifies the cost object (Duke department / area or the Project) to be charged for these items.
   
   - **Unloading Point** = specific location (room number or floor) where the delivery is to be made within a building per the delivery address.
   
   - **Goods Recipient** = first initial and last name of person who should receive the item when delivered.

4. Click on the ✅ Continue button to return to *Item Overview* screen.