

Work Instruction

Purchase Requisition: Finalize and Close

ME52N

When to Use

Use this procedure to release commitments when there will be no further Purchase Order items created. This process will mark each PR line item as 'CLOSED'.

Steps

- Identify Purchase Requisition to Finalize or Close.
- Confirm that no further item(s) on Purchase Requisition will be ordered.
- Change line(s) on Purchase Requisition in AMS to Finalize or Close Items.

Menu Path

Use the following menu path(s) to begin this transaction:

- Logistics → Materials Management → Purchasing → Purchase Requisition → Change

Transaction Code

ME52N

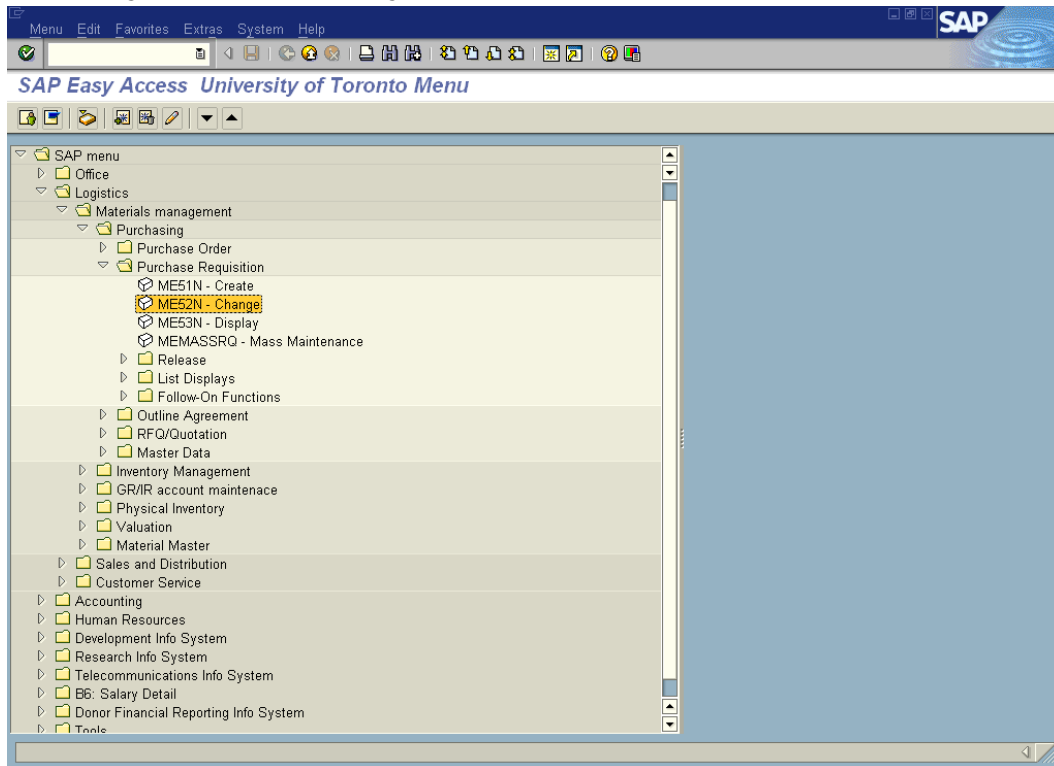
Helpful Hints

- If item has been created on a Purchase Requisition and is no longer needed it must be finalized or closed to release committed funds into FM Account free balance.
- If the Purchase Order has been created for the full quantity and all items have been ordered, the line item(s) do not need to be closed.

Detailed Procedure

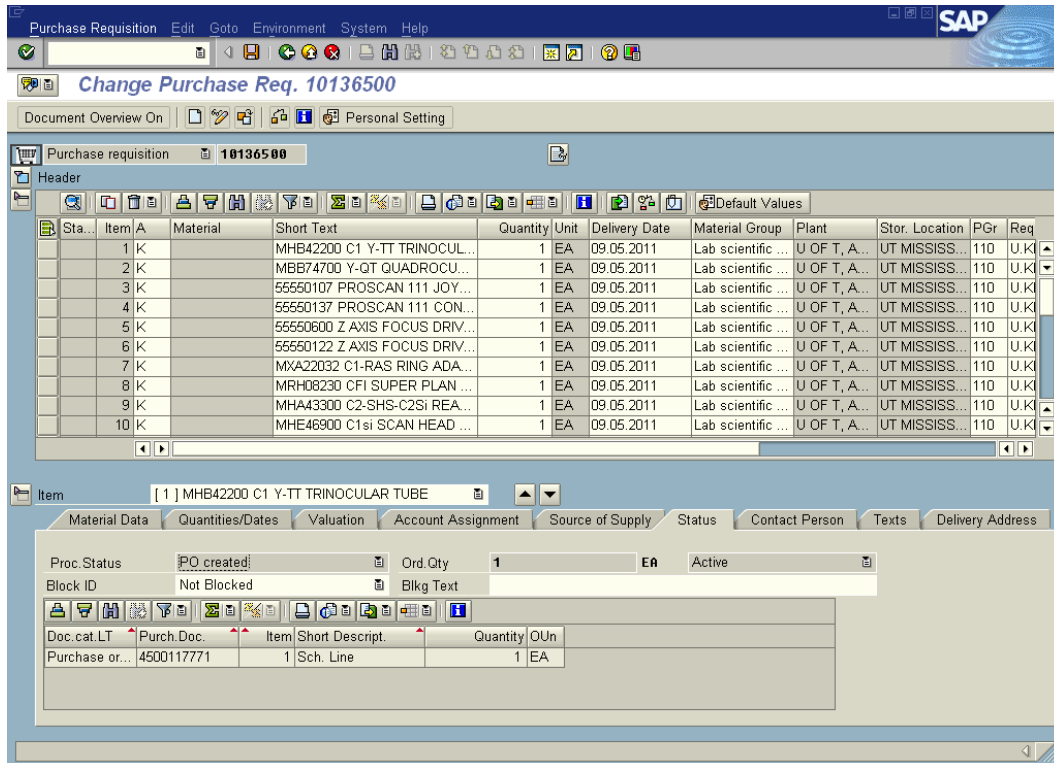
1. Start the transaction using the menu path or transaction code.

SAP Easy Access University of Toronto Menu



2. Double-click  ME52N - Change

Change Purchase Req. 10136500




The screenshot shows the SAP Purchase Requisition interface for requisition 10136500. The main table lists 10 items with columns for Item A, Material, Short Text, Quantity, Unit, Delivery Date, Material Group, Plant, Stor. Location, PGr, and Req. The selected item is MHB42200 C1 Y-TT TRINOCULAR TUBE.

Sta...	Item A	Material	Short Text	Quantity	Unit	Delivery Date	Material Group	Plant	Stor. Location	PGr	Req
	1	K	MHB42200 C1 Y-TT TRINOCUL...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	2	K	MBB74700 Y-QT QUADROC...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	3	K	55550107 PROSCAN 111 JOY...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	4	K	55550137 PROSCAN 111 CON...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	5	K	55550600 Z AXIS FOCUS DRIV...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	6	K	55550122 Z AXIS FOCUS DRIV...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	7	K	MXA22032 C1-RAS RING ADA...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	8	K	MRH08230 CFI SUPER PLAN ...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	9	K	MHA43300 C2-SHS-C2Si REA...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K
	10	K	MHE46900 C1si SCAN HEAD ...	1	EA	09.05.2011	Lab scientific ...	U OF T, A...	UT MISSISS...	110	U.K

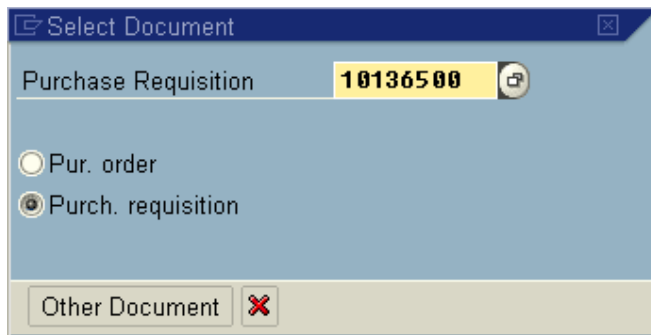
The 'Item' section shows details for MHB42200 C1 Y-TT TRINOCULAR TUBE, including Proc. Status (PO created), Ord. Qty (1), and a purchase order reference (4500117771).



Transaction will automatically display the last purchase requisition that was opened.


3. Click  or Select **Purchase Requisition** → **Other Requisition Shift+F5** to select a different Requisition.

Select Document

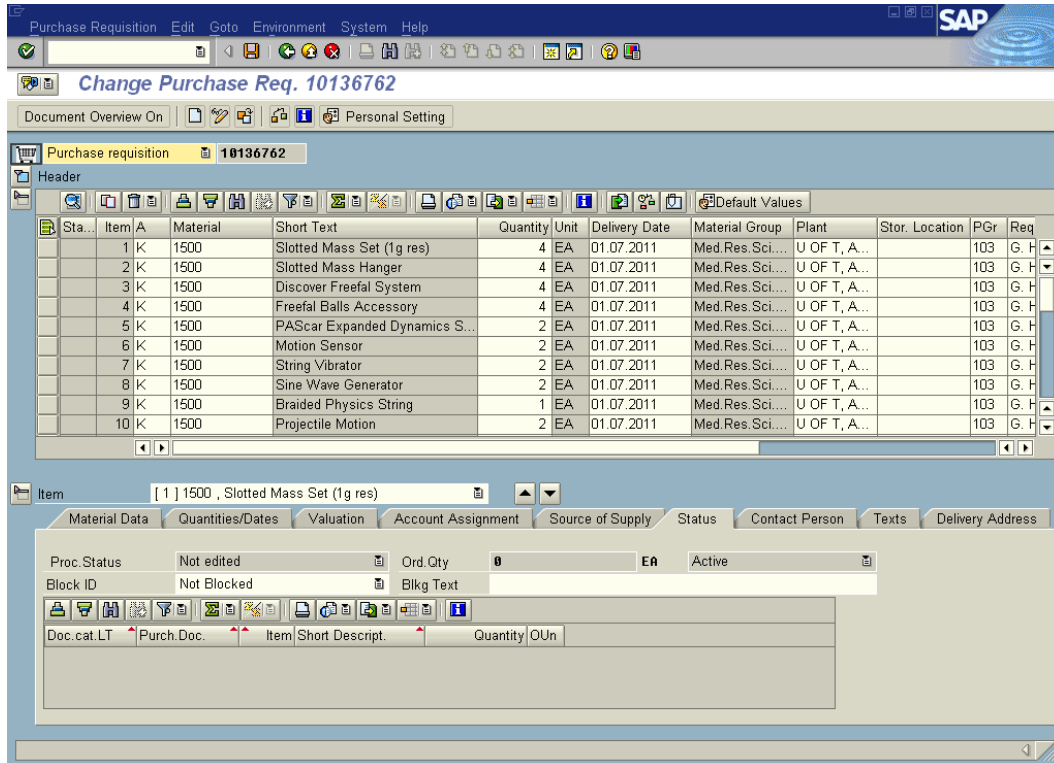


The screenshot shows the 'Select Document' dialog box. The 'Purchase Requisition' option is selected, and the requisition number 10136500 is displayed. There are radio buttons for 'Pur. order' and 'Purch. requisition', with 'Purch. requisition' being selected. An 'Other Document' button with a red 'X' is also visible.

3.1 Enter the Purchase Requisition Document Number to be changed.




4. Click  or Enter to select Purchase Requisition document.

Change Purchase Req. 10136762



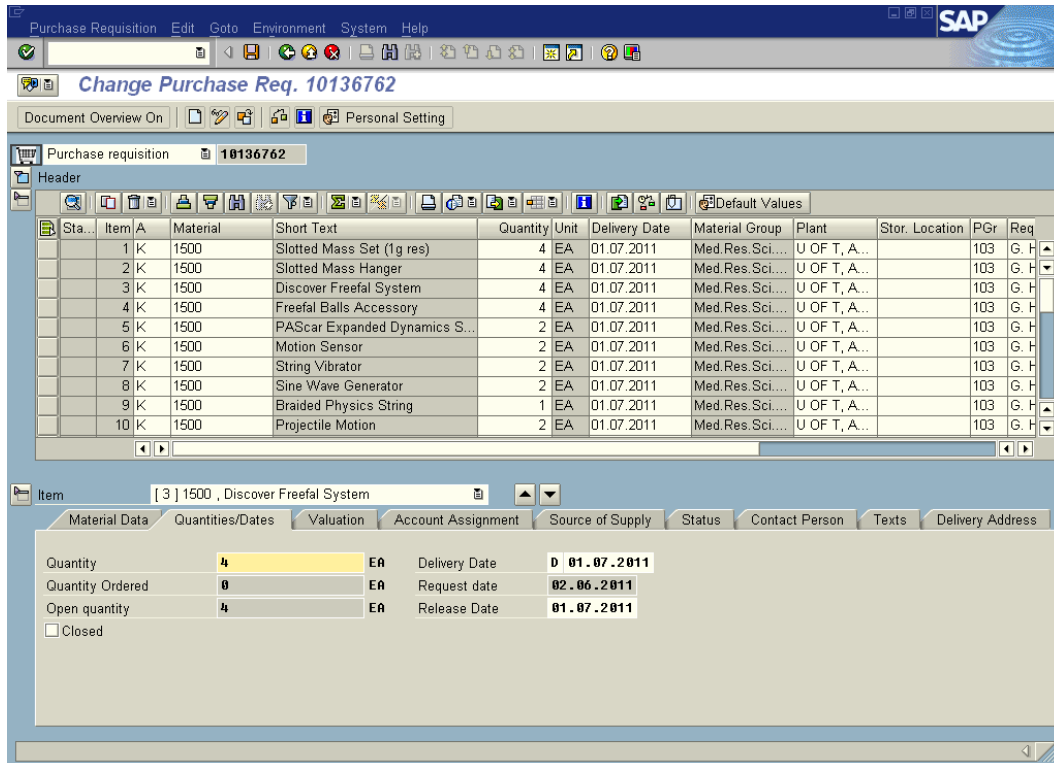
The screenshot shows the SAP Purchase Requisition interface for document 10136762. The main table lists 10 items with columns for Item A, Material, Short Text, Quantity, Unit, Delivery Date, Material Group, Plant, Stor. Location, PGr, and Req. The Item Details section at the bottom shows the selected item: [1] 1500, Slotted Mass Set (1g res). The Proc. Status is 'Not edited', Ord. Qty is '0', and EA is 'Active'. The Block ID is 'Not Blocked'.

Sta...	Item A	Material	Short Text	Quantity	Unit	Delivery Date	Material Group	Plant	Stor. Location	PGr	Req
	1 K	1500	Slotted Mass Set (1g res)	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	2 K	1500	Slotted Mass Hanger	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	3 K	1500	Discover Freefal System	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	4 K	1500	Freefal Balls Accessory	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	5 K	1500	PAScar Expanded Dynamics S...	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	6 K	1500	Motion Sensor	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	7 K	1500	String Vibrator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	8 K	1500	Sine Wave Generator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	9 K	1500	Braided Physics String	1	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	10 K	1500	Projectile Motion	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H

5. In the *Item Details* section at the bottom of the screen Click  or   to scroll through and select the item to be Finalized/Closed.

6. Click the **Quantities/Dates** Tab for the selected item.

Change Purchase Req. 10136762



The screenshot shows the SAP interface for changing purchase requisition 10136762. The main table lists 10 items with columns for Item A, Material, Short Text, Quantity, Unit, Delivery Date, Material Group, Plant, Stor. Location, PGr, and Req. Item 3 is highlighted.

Sta...	Item A	Material	Short Text	Quantity	Unit	Delivery Date	Material Group	Plant	Stor. Location	PGr	Req
	1 K	1500	Slotted Mass Set (1g res)	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	2 K	1500	Slotted Mass Hanger	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	3 K	1500	Discover Freefal System	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	4 K	1500	Freefal Balls Accessory	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	5 K	1500	PAScar Expanded Dynamics S...	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	6 K	1500	Motion Sensor	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	7 K	1500	String Vibrator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	8 K	1500	Sine Wave Generator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	9 K	1500	Braided Physics String	1	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H
	10 K	1500	Projectile Motion	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. H

The detailed view for item 3 shows the following data:

Material Data	Quantities/Dates	Valuation	Account Assignment	Source of Supply	Status	Contact Person	Texts	Delivery Address
Quantity	4	EA	Delivery Date	D 01.07.2011				
Quantity Ordered	0	EA	Request date	02.06.2011				
Open quantity	4	EA	Release Date	01.07.2011				
<input type="checkbox"/> Closed								

7. Check the Closed indicator to mark the item as complete.

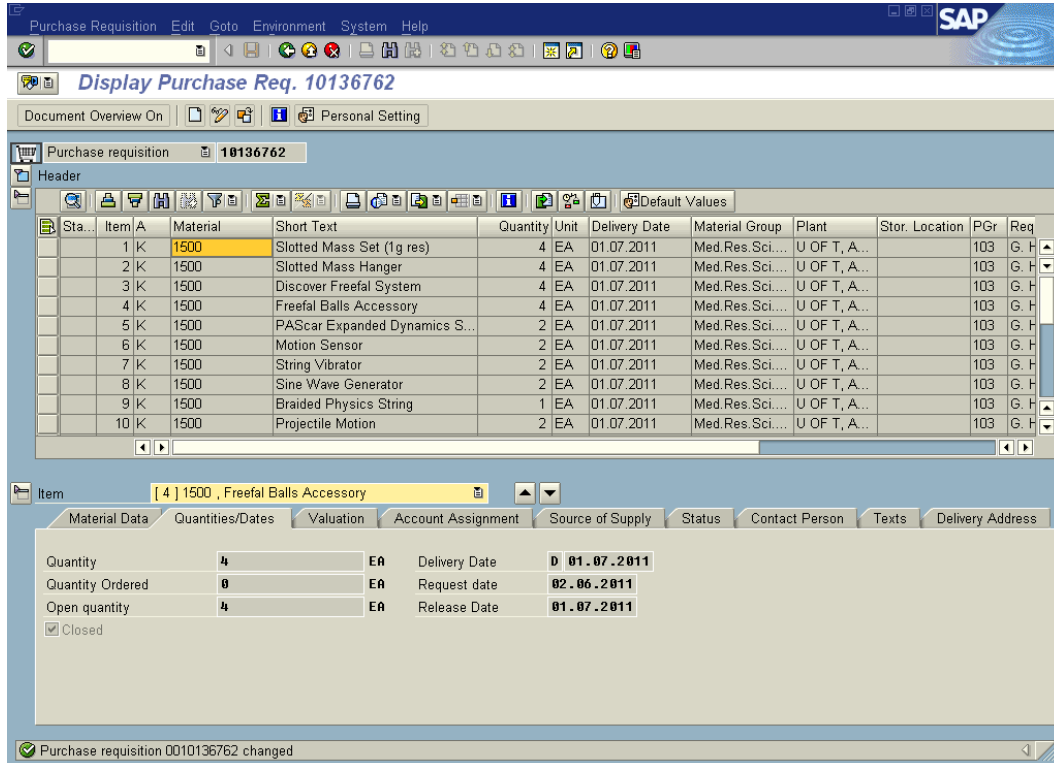


If Quantity Ordered equals Quantity then marking the item as Closed is not required.

8. Repeat steps 5 to 7 for other items as required.

9. Click  to save changes.

Display Purchase Req. 10136762



The screenshot shows the SAP interface for displaying purchase requisition 10136762. The main table lists 10 items with their respective quantities, units, delivery dates, and material groups. The selected item is 'Freefal Balls Accessory' (Material 1500, Quantity 4 EA, Delivery Date 01.07.2011).

Sta...	Item	A	Material	Short Text	Quantity	Unit	Delivery Date	Material Group	Plant	Stor. Location	PGr	Req
	1	K	1500	Slotted Mass Set (1g res)	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	2	K	1500	Slotted Mass Hanger	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	3	K	1500	Discover Freefal System	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	4	K	1500	Freefal Balls Accessory	4	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	5	K	1500	PAScar Expanded Dynamics S...	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	6	K	1500	Motion Sensor	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	7	K	1500	String Vibrator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	8	K	1500	Sine Wave Generator	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	9	K	1500	Braided Physics String	1	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F
	10	K	1500	Projectile Motion	2	EA	01.07.2011	Med.Res.Sci...	U OF T, A...		103	G. F

The 'Item' section for 'Freefal Balls Accessory' shows the following details:

Quantity	4	EA	Delivery Date	D 01.07.2011
Quantity Ordered	0	EA	Request date	02.06.2011
Open quantity	4	EA	Release Date	01.07.2011

A status message at the bottom indicates: 'Purchase requisition 0010136762 changed'.



The system displays message  Purchase requisition 0010136762 changed.

End of procedure.

Resource Information:



Contact your FAST team representative for additional assistance using this function.
<http://www.finance.utoronto.ca/fast/contacts.htm>

Reference Guides:

Finalize and Cancel Purchase Order:

<http://www.finance.utoronto.ca/fast/qrg/purch/po/finalizecancel.htm>