Work Instruction

Set Personal Settings

When to Use

Users are encouraged to use this functionality to ease the creation of a purchase order. Personal settings establish user default data to fields for creating a purchase order (i.e. Purchasing group). These settings remain within the user's profile and are defaulted into the purchase order each time a user begins creating a purchase order. If necessary, users can change the default data entered from personal settings while creating the purchase order.

Steps

1. Create your personal settings by entering the default data in the appropriate fields. Only complete the fields which will remain constant for your purchase orders.

2. Save your personal settings.

Note

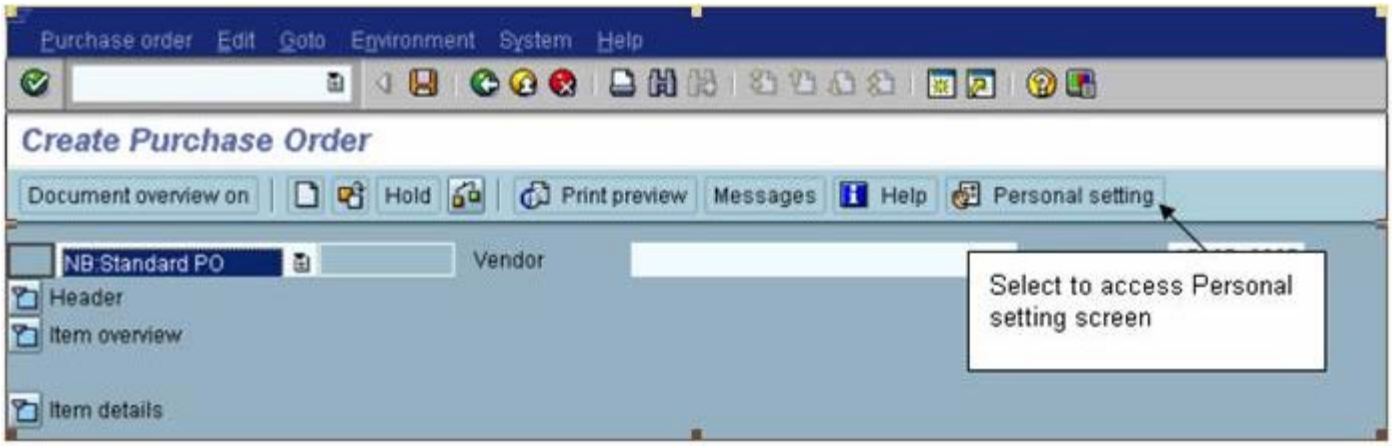
The SAP input screen for this transaction contains many fields/tabs, **this reference guide will only include information for those fields/tabs that are used in processing UofT transactions.**

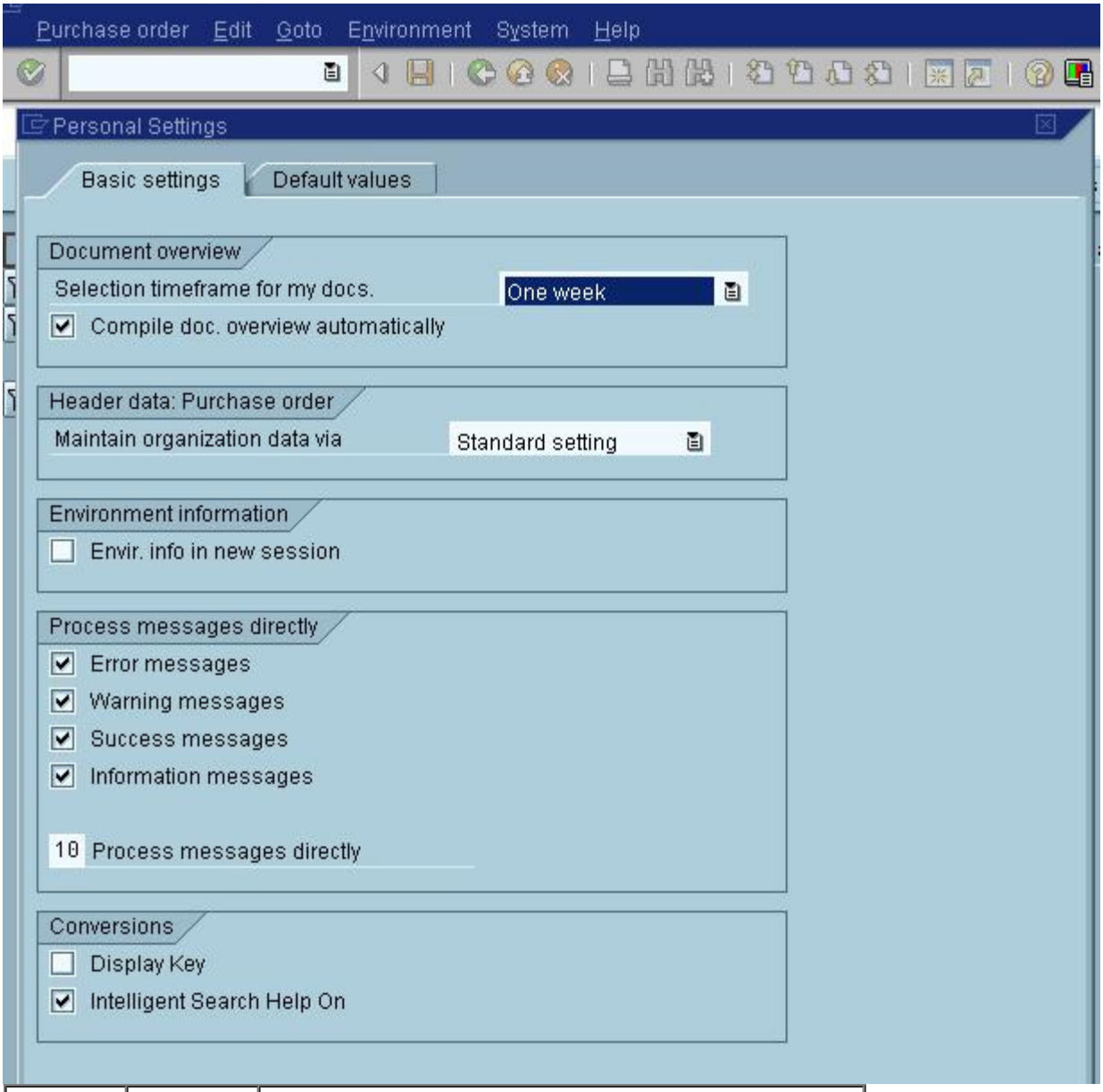
Detailed Procedures

Access the transaction using:

Menu	*Logistics >> Materials management >> Purchasing >> Purchase Order >> Create Purchase Order*
Transaction code	ME21N

Screen: Create Purchase Order



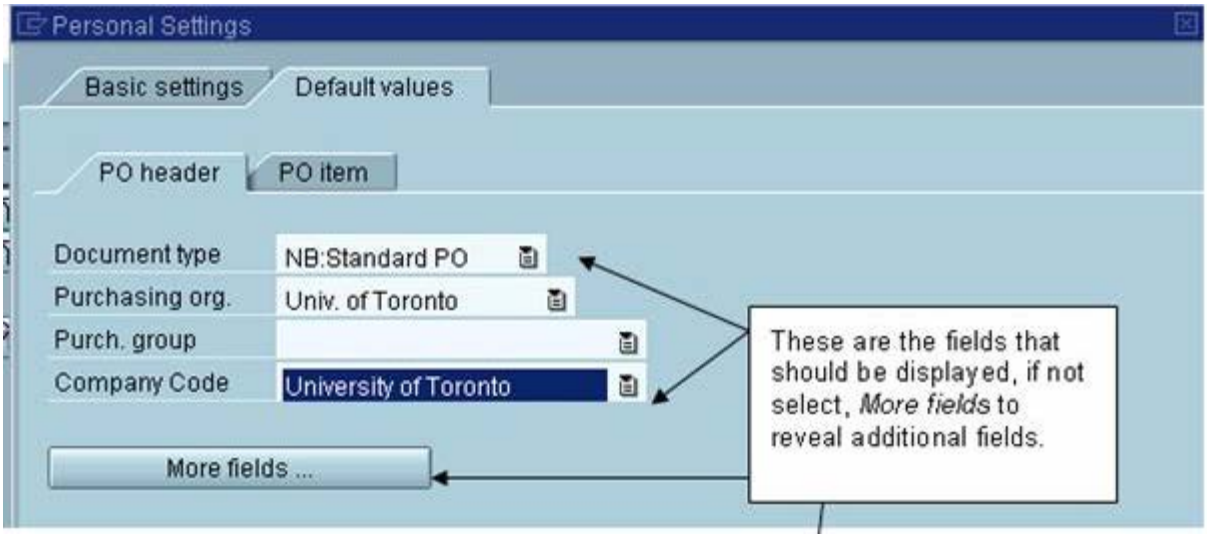


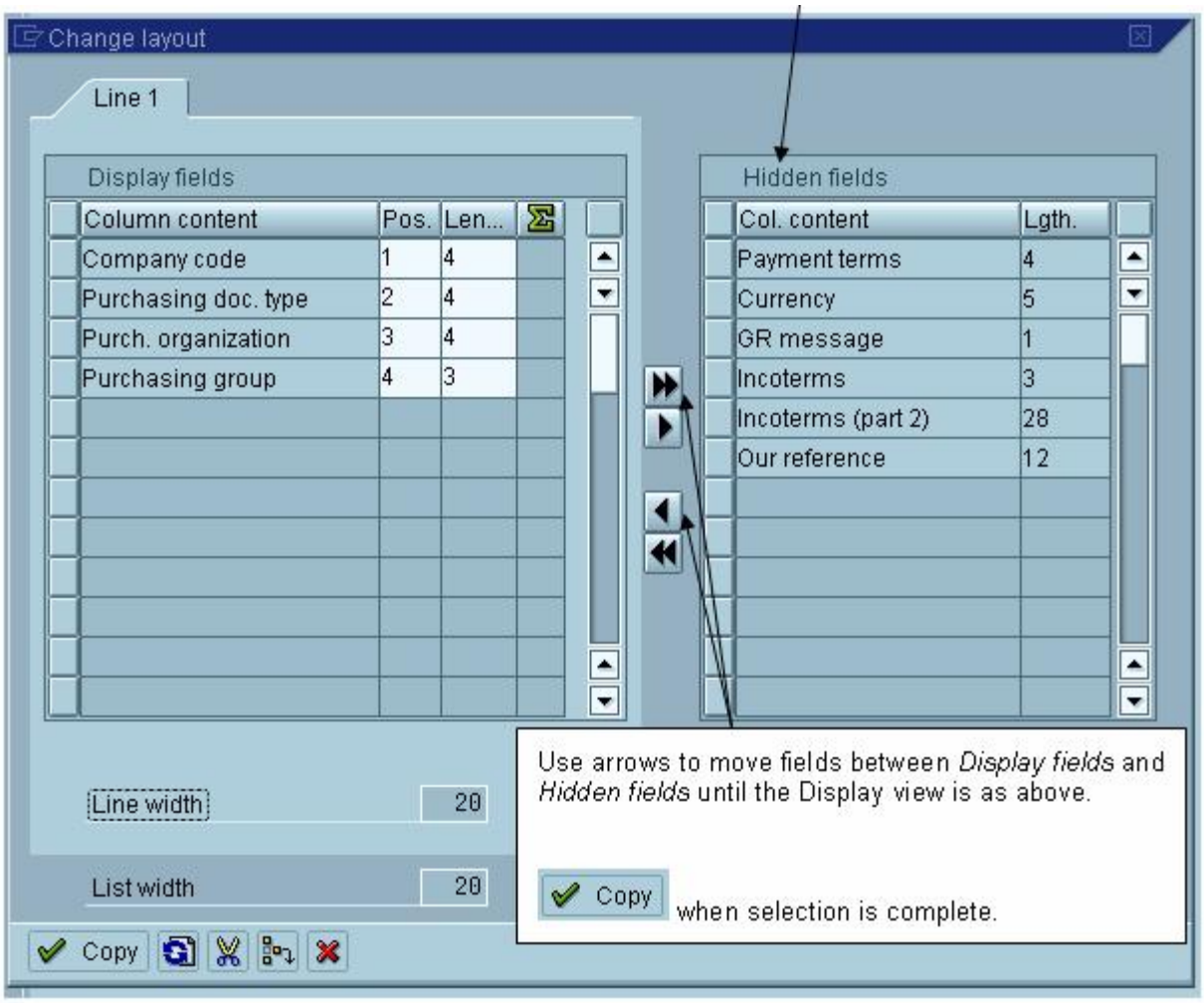
Field Name	Required (R) / Optional (O)	Description of Field Content
		This field determines the time frame (date range) for displaying your purchase orders

Selection time frame for my docs.	O	requisitions in the Document overview. The default is for 7 days (one week) but can be changed to display purchase orders in any date range from 1 day to (i.e. "No restrictions"). Use the pick list matchcode button to select a time frame.
Leave all other settings as is in this tab.		

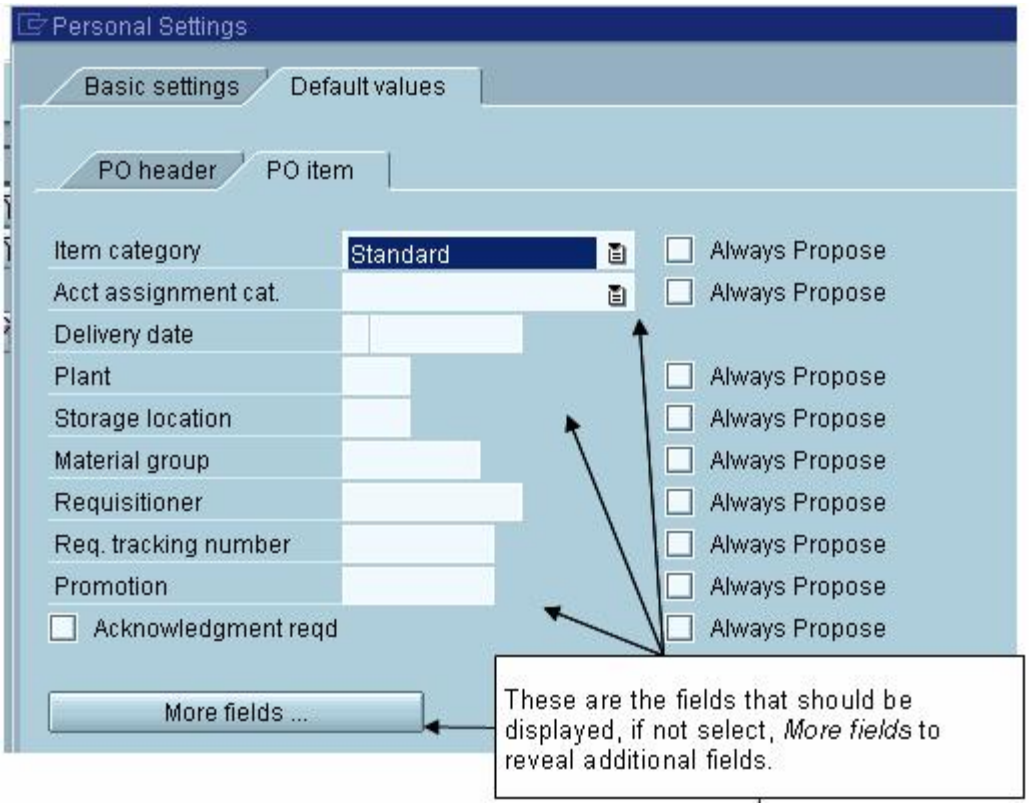
Click on the Default values tab (Default values **).**

Click on PO item sub-tab (PO header **).**

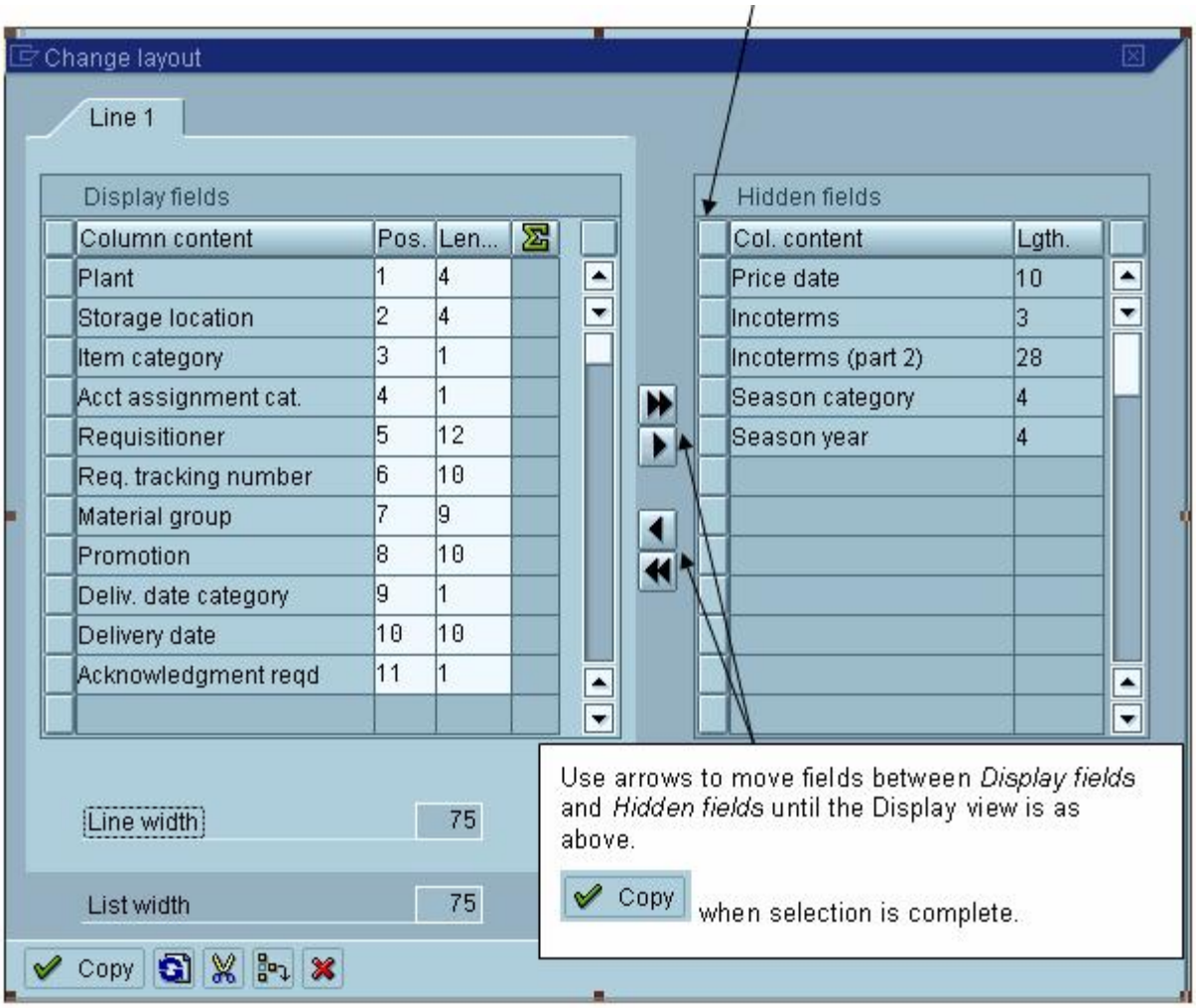




Field Name	Required (R) / Optional (O)	Description of Field Content
Document type	O	Defaults to **NB Standard PO** . Select the document type most commonly processed. Use matchcode button for possible entries (i.e. Lease orders, Standard PO).
Purchasing org.	R	Enter Univ. of Toronto (1000) or U. of T. - EBP (2000).
Purch. group	R	Enter your Purchasing group. Use matchcode button for possible entries.
Company Code	R	Enter **UOFT** for University of Toronto. Use matchcode button for possible entries (i.e. FLDI for Fields Institute).
Click on PO item sub-tab (PO item **).**		



Do not select **Always propose** . The system automatically defaults settings when creating a purchase order.



Field Name	Required (R) / Optional (O)	Description of Field Content
Item category	O	Defaults to **O Standard** . Leave as is.
Acct assignment cat.	O	Use the pick list button to select either *Cost Center* or *Order*s.
Plant	R	Code should be within 1XXX or 2XXX. Use matchcode button to find your Plant code; if a specific one is not available, use general campus code (ie. 1000 for Scarborough Campus, 1500 for Mississauga Campus 2000 for UofT St. George Campus).
Storage location	R	Enter your storage location. Use matchcode button to find your departmental **Storage location** .
Material group	O	Enter the material group. Unless you are creating several purchase orders with this material group, leave this field blank. Use matchcode button for possible entries (i.e. RADIATION for ALL radioactive purchases).

Requisitioner	O	Enter the requisitioner's name. Unless you are creating several purchase orders for this requisitioner, leave this field blank.
Req. Tracking number	O	This is an open text field that can be used to further track postings. (10 character field similar to the ASSIGNMENT field).
Acknowledgement reqd	O	Select this box. This will enter a line at the top of the purchase order requesting the vendor acknowledge receipt of your purchase order. This can be very valuable when faxing purchase orders to ensure your purchase order was faxed to the correct vendor.
Save		Saves your personal settings.

End of procedure.