

SAP Requisitioning Through the ESS Portal

Requisitioning Through the PASSHE Portal

A requisition defines the need for a material or service. It is the primary instrument for identifying materials or services that must be procured outside the university. It authorizes the Purchasing department to purchase materials or services in specific quantities within a specified time frame. It is an internal document and is not used outside of the university. Vendors cannot be authorized to ship materials or deliver services with just a requisition number. The last step in the purchase requisition process is a check on budget availability. If the funds are not available, the purchase requisition cannot be created; however, the requisition can be put in a "held status" and finalized when the appropriate budget is available. Funds are encumbered (committed) when the requisition is saved.

In SAP, whether using the Pennsylvania State System of Higher Education (PASSHE) Employee Self Service (ESS) Portal or Production, a user creates an eRequisition (electronic Purchase Requisition). The Purchasing Department reviews the eRequisition and creates a Purchase Order.

Approval Process

A purchase must be approved by the appropriate cost center manager(s) prior to entering the eRequisition. This approval must adhere to the following requirements:

- The approval must be in writing and if in E-Mail format, must originate from the Cost Center manager(s)
- The approval must summarize what is being purchased and the justification for the purchase
- The approval must indicate the total dollar amount to be committed
- The approval must indicate what cost center(s) is/are to be charged for the expense
- A hardcopy of the approval must be retained in the department's files for a period of three years and made available for audit upon request.

Information You Must Have Before You Start

Prior to signing into the portal to create an eRequisition, you need to assemble the following pieces of data related to the purchase.

- If you wish a particular vendor to be considered, the proposed vendor's name, address, phone, and contact person
- An accurate and complete description of what good or service you are purchasing, including quantities, units of measure, model numbers, pricing, etc.
- A justification for the purchase being made with the use of public funds
- The name of the person who is requisitioning the good or service
- A realistic delivery date
- The location to which the goods will be shipped by the vendor (Central Receiving, Schmucker Science, Direct Department, etc.)
- The building, room number, and person to which the good or service will be delivered (very important for goods delivered to a receiving dock)
- The GL account number for each item
- The SAP Cost Center number(s) and/or SAP WBS Element number(s) to be charged for each item
- The SAP Material Group associated with each item

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Logging into the PASSHE Portal

There are two ways to log in to the PASSHE Portal.

1. You can use the direct link: <https://portal.passhe.edu/irj/portal>
2. Or you can use the WCU Website:
 - a. Use the link: <https://www.wcupa.edu/>
 - b. Click on Departments at the top right of screen
 - c. Click on E for ESS
 - d. Click on Employee Self Service

Sign into the PASSHE portal. To enter eRequisitions you need to have the Materials Management tab, as indicated below:



Welcome to the Materials Management area of the Self-Service Portal.

This page will provide you with information about each of the applications available for you to access in this area of the Self-Service Portal. For each application, you will see a corresponding entry across the second level of the navigation bar. To access an application, simply click on the entry in the navigation bar. If required, further navigation instructions or messages will be given under that area of the portal. A list of all the applications to which you have been granted access is shown below with descriptions of the applications.

Purchase Requisition

This application allows you to **create, change, display, or approve** purchase requisitions depending on your SAP security.

If you do not see the Materials Management tab, please email SAPFiscal@wcupa.edu to request access.

Please have your manager email SAPFiscal@wcupa.edu to approve the access request.

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Steps to create an eRequisition

1. Click on the Materials Management tab.

Welcome

Pennsylvania State System of Higher Education [Log off](#)

Home Employee Self-Service Manager Self-Service **Materials Management** SAP GUI Business Intelligence

Welcome | Purchase Requisition

Welcome [History](#) [Back](#) [Forward](#)

Welcome to the Materials Management area of the Self-Service Portal.

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Purchase Requisition

This application allows you to **create, change, display, or approve** purchase requisitions depending on your SAP security.

2. Click on the Purchase Requisition Link

Home Employee Self-Service Manager Self-Service **Materials Management** SAP GUI Business Intelligence

Welcome | Purchase Requisition

Purchase Requisition [History](#) [Back](#) [Forward](#)

Purchase Requisition

Purchase Requisition

This page allows you to **create** new requisitions in SAP. This page will also allow you to change or display existing requisitions. This is an alternative to transactions ME51N, ME52N, & ME53N.

3. Choose the action you wish to take – Create, Copy, Change, or Display.

Purchase Requisition

This page allows you to create new requisitions in SAP. This page will also allow you to copy, change or display existing requisitions. Using the ESS Material Management tab is an alternative to entering requisitions directly into SAP Production (which uses transaction codes ME51N, ME52N and ME53N).

Select an option and click "Continue".

Create New Requisition

Copy an Existing Requisition

Change an Existing Requisition

Display an Existing Requisition

[Continue](#)

Choose the appropriate action and click Continue.

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- When creating a requisition, in the Header Note field enter vendor name and address, vendor contact person phone/email and TAX ID (if have it) as well as a justification/reason for the purchase:

Purchase Requisition - Create

Purchase Req # (Assigned by SAP):

Header Note:

Vendor Name
Vendor Address
Vendor Contact Information
Justification Statement

- Fill in the required information in **all** four tabs in the Line Details Section. Some fields have an option to look up values, using the Search button to the right of the blank field. 

Line Details

General | Account Assignment | Texts | Delivery Address

Purchasing Group: 750 -- West Chester Leave default of #750 unless already working with someone in Purchasing.

Short Text: Maximum of 40 characters for Short Text line item information.

Material Group: 00260 COMPUTER HARDWARE See **Appendix A** for Material Group number options.

Quantity: 1 Each (EA) Requisitioner: Don Fogg

Unit Price: 10.50 / 1 Each (EA) Tracking Number: OU812C

Delivery Date: 4/20/2012 First initial, last name can also be used for Requisitioner. Invoice number can be entered in Tracking Number field.

Desired Vendor:

Goods Receipt
 Invoice Receipt
 GR Non-Val.

Vendor information is included in the Header. Step 4 above. Purchasing will select Desired Vendor based on Header. Goods Receipt should only be selected when goods are being received through a receiving location (i.e. Warehouse, South Campus). Invoice Receipt should always be selected. (Two can be selected at the same time.)

Line Details

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

Category K is preferred. Distribution of Single Account or Split Distribution can be selected.

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

Unloading Point: 201 Carter Dr Where item is to be delivered or Recipient's service location. Don Fogg First initial, last name can also be used for Recipient.

G/L Account: 660125 G/L Account and Cost Center are **required**.

Cost Center: 7511002000

Fund: 7511001000

Funds Center: 7511002000

Functional Area: 6130

Earmarked Funds:

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Line Details

General Account Assignment **Texts** Delivery Address

Item Text
Item Note
Delivery Text

This is the Item text section. This will print on the purchase order.

The following can be included here:

- Your name and phone number as point of contact
- Line Item information if it did not fit in Short Text on the General Tab
- Agreement Date Range
- Delivery Instructions

Enter Address Number Here.

Account Assignment Texts **Delivery Address**

Number: 297354 #297354 is used for maintenance/service contract type Requisitions, where work is done at a campus location. #222714 is used for goods to be delivered to Central Receiving. See **Appendix B** for additional options or use the Search button to search by street name.

Name: West Chester University of Pennsylvania
Direct Department Delivery

Street / House Number: Direct Department

Postal Code / City: 19383 West Chester

Country / Region: US PA

Save Item

6. When you are finished entering the information into **all four tabs**, click the **Save Item** button. Skip to Step 12 if there are no other line items needed.

Add New Line Button -

7. To add additional lines, click the Add New Line button and repeat the process of steps 5 and 6.

Purchase Requisition - Create

Purchase Req # (Assigned by SAP):

Header Note:

Vendor Name
Vendor Address
Vendor Contact Information
Justification Statement

Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total
1	This is the short text. You have 40 char	4/20/2012	1	EA	\$10.50 / 1	\$10.50

Add New Line

Add New Line

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Copy Line to New Line Button if additional line needed has similar information -

8. To copy a line that was already entered, click in the first block of the line. You will then see a Copy Line to New Line button. Click that button to replicate the initial line.

Requisition Items							
Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total	
1	This is the short text. You have 40 char	4/20/2012	1	EA	\$10.50 / 1	\$10.50	

Add New Line

Line Details

General Account Assignment Texts Delivery Address

Number: 297354

Name: West Chester University
of Pennsylvania
Direct Department Delivery

Street / House Number: Direct Department

Postal Code / City: 19383 West Chester

Country / Region: US PA

Copy Line to New Line Edit Selected Item Delete Selected Item

Copy Line to New Line

Save Purchase Requisition Hold Requisition

9. Make any necessary changes to that new line and click the Save Item Button.

Hold Requisition Button can be used if funds have not yet been allocated to your cost center number. Purchasing will not process the eRequisition until it is taken off hold status. -

10. Click the Hold Requisition button. An email is sent to the requisitioner every 30 days of the hold.

Save Purchase Requisition Hold Requisition

11. If you place the requisition on hold you will see the following message.

Purchase Req # (Assigned by SAP): 0010376906

Header Note: Vendor Name
Vendor Address
Vendor Contact Information

Requisition Items							
Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total	
1	This is the short text. You have 40 char	4/20/2012	1	EA	\$10.50 / 1	\$10.50	
2	This is the short text for line 2.	4/20/2012	1	EA	\$5.75 / 1	\$5.75	

Total Purchase Requisition Price: \$16.25

Add New Line

Can delivery date be met?

Can delivery date be met?

Purchase Requisition 0010376906 has been successfully created and set to hold. If you wish to change this requisition you may do so now or exit the system.

Save Purchase Requisition

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Save Purchase Requisition -

12. After clicking the Save Purchase Requisition button you will see the following:

Purchase Requisition - Change

Purchase Req # (Assigned by SAP): 0010376906

Header Note:
Vendor Name
Vendor Address
Vendor Contact Information

Requisition Items							
Line	Short Text	Delivery Date	Quantity	Unit	Price	Line Total	
1	This is the short text. You have 40 char	4/20/2012	1	EA	\$10.50 / 1	\$10.50	
2	This is the short text for line 2.	4/20/2012	1	EA	\$5.75 / 1	\$5.75	
Total Purchase Requisition Price: \$16.25							

Add New Line

 Purchase Requisition 0010376906 has been successfully changed.

Adding Attachments

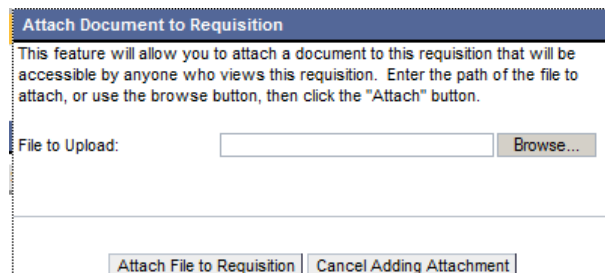
Backup approval/support for an eRequisition must be attached for the Purchasing Department to review. This could include a signed invoice, a PDF file of an email approving/requesting the purchase, a file explaining the justification for the purchase or a quote.

An eRequisition must be saved first, in order to see the Attachments option.

1. After saving, click on the eRequisition just created/changed.
2. Go to the Attachments tab and click the Attach New Document button. You must be in edit/update mode to see this button (after saving).



3. Follow the prompts to find the backup file(s) and click the Attach File to Requisition button.



4. Click the Save Purchase Requisition button when finished adding all Attachments.

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Appendices

Appendix A: Material Group Numbers

Appendix B: Delivery Address Numbers

Appendix A

Material Group Number	Material Group Description	Additional Description
00300	AGRICULTURE	AGRICULTURE
00308	ANIMALS_ANIMAL SUPP	ANIMALS_ANIMAL SUPPLIES
00548	APPAREL_UNIFORMS	APPAREL_UNIFORMS_FOOTWEAR
00292	BARRELS_DRUMS_KEGS	BARRELS_DRUMS_KEGS
00572	CHEMICALS_SOLVENTS	CHEMICALS_SOLVENTS
00260	COMPUTER HARDWARE	COMPUTER HARDWARE
00252	COMPUTER SOFTWARE	COMPUTER SOFTWARE-SUPPORT_MAINT
00228	CONFERENCE RM_MATLS	CONFERENCE ROOM_MATERIALS
00180	COPIER-PURC_RENT_EQ	COPIER-PURCH_RENT_EQUIPMENT_MAINT
00172	DESKTOP PRINTERS	DESKTOP PRINTERS
00100	EDUCATION-MATLS_SUPP	EDUCATIONAL-MATERIALS_SUPPLIES
00340	ELEVATOR-INSTALL_M&R	ELEVATOR-INSTALL_MAINT_REPAIR_RENOVATION
00124	EQ_LIBRARY_ARCHIVAL	EQUIPMENT-LIBRARY_ARCHIVAL
00444	EQ_SP_LANDSCAPING	EQUIPMENT_SUPPLIES-LANDSCAPING
00452	EQ_SP_MATRIAL_HNDLNG	EQUIPMENT_SUPPLIES-MATERIAL HANDLING
00460	EQ_SP_MEDICAL	EQUIPMENT_SUPPLIES-MEDICAL
00468	EQ_SP_PAINTING	EQUIPMENT_SUPPLIES-PAINTING
00476	EQ_SP_PARK_PLAYGRND	EQUIPMENT_SUPPLIES-PARK_PLAYGROUND
00484	EQ_SP_PLUMBING	EQUIPMENT_SUPPLIES-PLUMBING
00492	EQ_SP_POLICE	EQUIPMENT_SUPPLIES-POLICE
00500	EQ_SP_RADIO_TELEPH	EQUIPMENT_SUPPLIES-RADIO_TELEPHONE
00508	EQ_SP_SECURITY_ACCESS	EQUIPMENT_SUPPLIES-SECURITY_ACCESS SYS
00516	EQ_SP_WATER_TREATMNT	EQUIPMENT_SUPPLIES-WATER TREATMENT
00524	EQ_SP_WELDING	EQUIPMENT_SUPPLIES-WELDING
00316	FLOOR-INSTALL_M&R	FLOORING-INSTALL_MAINT_REPAIR
00236	FOOD_BEVERAGE PRODS	FOOD_BEVERAGE PRODUCTS
00588	FUEL_OIL_GREASE	FUEL_OIL_GREASE
00332	FURNITURE-PURCH_M&R	FURNITURE-PURCHASE_MAINT_REPAIR
00580	GASES-MED_RESEARCH	GASES-MEDICAL_RESEARCH
00564	HAZARDOUS MATERIALS	HAZARDOUS MATERIALS
00196	HONORARIUM	HONORARIUM
00212	HOTEL_LODGING	HOTEL_LODGING
00108	LIBRARY MATLS_SUPP	LIBRARY MATERIALS_SUPPLIES
00276	LIGHT FIXTURES_BULBS	LIGHT FIXTURES_BULBS
00540	LOGISTICS-DELIVERY	LOGISTICS-DELIVERY_FRIEGHT

Appendix A

00188	MEMBERSHIPS	MEMBERSHIPS
00284	MRO SUPPLIES	MRO SUPPLIES-MAINT_REPAIR_OPERATIONS
00148	OFFICE SUPPLIES	OFFICE SUPPLIES
00156	PAPER-OFFICE_PRINTNG	PAPER-OFFICE_PRINTING
00556	PHARMACEUTICALS	PHARMACEUTICALS
00140	PROMOTIONAL PRODUCTS	PROMOTIONAL PRODUCTS
00684	REAL ESTATE_ACQUISIT	REAL ESTATE - LAND/PROPERTY ACQUISITION
00644	RENTAL-GENERAL EQ	RENTAL-GENERAL EQUIPMENT
00652	RENTAL-IT EQ	RENTAL-IT EQUIPMENT_COMPUTERS
00660	RENTAL-JANITORL EQ	RENTAL_LEASE-JANITORIAL EQUIPMENT
00668	RENTAL-OFFICE EQ	RENTAL_LEASE-OFFICE EQUIPMENT
00676	RENTAL-REAL PROPERTY	RENTAL_LEASE-REAL PROPERTY
00132	SIGNS_FLAGS_BANNERS	SIGNS_FLAGS_BANNERS
00204	SPEAKERS_ENTERTAINER	SPEAKERS_ENTERTAINERS
00788	SRVC-EDUCATIONAL	SERVICES-EDUCATIONAL
00796	SRVC-ENVIRONMENTAL	SERVICES-ENVIRONMENTAL
00804	SRVC-FINANCIAL	SERVICES-FINANCIAL
00812	SRVC-GRNDS_LAND_SNOW	SERVICES-GROUNDS KEEPING_LANDSCAPING
00820	SRVC-HAZARDOUS MATRL	SERVICES-HAZARDOUS MATERIALS
00828	SRVC-HR RECRUIT_TEMP	SERVICES-HR RECRUITING_TEMP PERSONNEL
00836	SRVC-INFO TECHNOLOGY	SERVICES-INFO TECHNOLOGY_PROGRAMMERS
00844	SRVC-JANITORIAL	SERVICES-JANITORIAL
00852	SRVC-MAILING	SERVICES-MAILING
00860	SRVC-MEDICAL_HEALTH	SERVICES-MEDICAL_HEALTH RELATED
00868	SRVC-MOVE_RELOCATION	SERVICES-MOVING_RELOCATION
00876	SRVC-OFFIC EQ REPAIR	SERVICES-OFFICE EQUIPMENT REPAIR
00884	SRVC-OTHER EQ REPAIR	SERVICES-OTHER EQUIPMENT REPAIR
00892	SRVC-OTHER PROF	SERVICES-OTHER PROFESSIONAL
00900	SRVC-PEST CONTROL	SERVICES-PEST CONTROL
00908	SRVC-PRINTING_PHOTO	SERVICES-PRINTING_PHOTOGRAPHIC
00916	SRVC-PROF DESIGN	SERVICES-PROF DESIGN_ARCHITECTRL_ENVIRON
00924	SRVC-REAL ESTATE	SERVICES-REAL ESTATE_APPRAISALS
00932	SRVC-REFUSE_RECYCLE	SERVICES-RCYCLE_REFUSE-HAZ MAT DISPSL
00940	SRVC-SECURITY	SERVICES-SECURITY
00948	SRVC-SIGN LANGUAGE	SERVICES-SIGN LANGUAGE
00956	SRVC-TRANSPORTATION	SERVICES-TRANSPORTATION

Appendix A

00964	SRVC-UTIL_ENRGY_FUEL	SERVICES-UTILITIES_ENERGY_FUEL
00116	SUBSCRIPTIONS_BOOKS	SUBSCRIPTIONS_BOOKS_PERIODICALS
00268	TECHNICL ACCESS_STUD	TECHNICAL ACCESSIBILITY - STUDENT
00164	TONER_INK	TONER_INK
00220	TRAVEL-EDUCATIONAL	TRAVEL-EDUCATIONAL
00596	UTIL_ENERGY-COAL	UTILITIES_ENERGY-COAL
00604	UTIL_ENERGY-ELECTRIC	UTILITIES_ENERGY-ELECTRIC
00612	UTIL_ENERGY-NAT GAS	UTILITIES_ENERGY-NATURAL GAS
00620	UTIL_ENERGY-OIL	UTILITIES_ENERGY-OIL
00628	UTIL_ENERGY-WOOD	UTILITIES_ENERGY-WOOD CHIPS
00532	VEHICLE-PURC_PRTS_RPR	VEHICLES-LEASE_PURC_PART_REPR_ARMORED CAR
00244	WATER SRVC_BOTTLED	WATER SERVICES_BOTTLED
00636	WATER_SEWAGE	WATER_SEWAGE
00324	WINDOW TREATMENTS	WINDOW TREATMENTS-BLINDS_DRAPES_AWNINGS

Appendix B

Delivery Addresses - Ship To Locations	Number
Central Receiving, 821 S. Matlack Street - *Default	222714
25 W. Rosedale Avenue, FHG Library	223724
Facilities, 201 Carter Drive, Suite 500	223840
Schmucker Science, 750 S. Church Street, Room SS105A	223842
South Campus, 855 S. New Street, Room 220	223838
Graphics & Printing	223839
Direct Department - **Used for maintenance/service eReq's	297354
South Campus, 855 S. New Street, Health Sciences	398549