

## **SAP Forms Information**

### **To create a form in SAP:**

All Forms must be added to the template table first. To do this, use the following directions:

- 1) Enter the command code Z\_FORMSM
- 2) Click on "Update Departments"
- 3) Click on "New Entries"
- 4) Enter Plant (UK10)
- 5) Enter Department (We have been using 5 digit alpha-numeric HR Department code with building speed sort)
- 6) Enter Department Name (We have been using the building name with the department after such as "POT Custodial" or in the case of Building Operators, "BO Classroom Building")
- 7) Click Save
- 8) Click the "Back" button to get to the first Forms screen

From this point, you will create either a Reservation Template Form or a Requisition Template Form.

Reservation Forms are for SAP/UK Supply Center Stock Items. Stock items are kept in the UK Supply Center warehouse.

Requisition Forms are for SAP/UK Supply Center Non-Stock Items. A Non-Stock Item is an item that is in SAP and easily available to us through the vendors, but not kept in UK Supply Center warehouses.

A NON-FILE Item is an item that UK Supply Center does not carry and is not available through the FORMS system. If you need a NON-FILE ITEM, you will need to submit a Purchase Requisition through Purchasing. This will involve obtaining as much information about the item as you can; including pricing quotes from the vendor to ensure that Purchasing has all the information they need to create the Purchase Order.

### **For Stock Items:**

- 1) Click on the "Reservation Template" button
- 2) Enter the Form Name (We have been using the Department Name from the Template Table)
- 3) Enter the Plant (UK10)
- 4) Enter the Department Code (From the Template Table)
- 5) Enter the Cost Object Type (in most cases this will be an Order)
- 6) Enter the Cost Object Number (This is the account number)
- 7) Enter the Unloading Point

- 8) Enter the recipient
  - a. If you choose, you can enter "Call (phone number) in the unloading point and the person's name in the recipient information
- 9) Click on the white piece of paper in the upper left corner of the screen UNDER the words "CREATE FORM TEMPLATE".
- 10) Enter the desired material number in the "Item/Description" field
- 11) PAR levels will default to 0, please change to at least 1
- 12) When you have finished, click "Save" and you will be given the new form number

\*\*\* If you are setting up several Forms with identical items, you can create the first Form and then enter that Form Number into the "Ref Form Num" box for subsequent forms. When you click on the white page at the top of the screen, the form will automatically populate with the items you have placed on the form you chose to reference \*\*\*\*

### **For Non-Stock Items:**

Non-Stock Items are items that are in SAP and easily available to us through the vendors, but not kept in UK Supply Center warehouses.

- 1) From the opening Forms screen, click on "Requisition Template"
- 2) Enter the Form Name (We have been using the original Form name and adding Non-stock to it)
- 3) Enter the Plant (UK10)
- 4) Enter the Department Code (From the Template Table)
- 5) Enter the Cost Object Type (in most cases this will be an Order)
- 6) Enter the Cost Object Number (This is the account number)
- 7) Enter the Unloading Point
- 8) Enter the recipient
  - a. If you choose, you can enter "Call (phone number) in the unloading point and the person's name in the recipient information
- 9) Click on the white piece of paper in the upper left corner of the screen UNDER the words "CREATE FORM TEMPLATE".
- 10) Enter the desired material number in the "Item/Description" field
- 11) When you have finished, click "Save" and you will be given the new form number

\*\*\* If you are setting up several Forms with identical items, you can create the first Form and then enter that Form Number into the "Ref Form Num" box for subsequent forms. When you click on the white page at the top of the screen, the form will automatically populate with the items you have placed on the form you chose to reference \*\*\*\*

### **For Non-File Items:**

A NON-FILE Item is an item that UK Supply Center does not carry and is not available through the FORMS system. If you need a NON-FILE ITEM, you will need to submit a Purchase Requisition through Purchasing. This will involve obtaining as much information about the item as you can; including pricing quotes from the vendor to ensure that Purchasing has all the information they need to create the Purchase Order.

### **To Edit Existing Forms:**

- 1) From the Opening Forms screen, click on "Change Template"
- 2) Enter the Form Number
- 3) Hit Enter
- 4) To change Header Information (Such as Form name, Plant, Department Code, Cost Object Type, Cost Object Number or Unloading Point/Recipient Information) Click on the button with the glasses and pencil
- 5) To change items on the Form itself, click on the piece of paper with the yellow arrow
- 6) To add items, click on the button with the GREEN Plus Sign at the bottom Left corner of the page under the list of items, then enter the item number you wish to add
- 7) To remove items from the Form, highlight the item you want removed by clicking on the click on the box next to the item in the list and then clicking the button with the RED Minus Sign on the bottom left corner of the screen.
- 8) When you have finished editing, click "Save"

Additional Information:

- A Reservation Form sends a request directly to our warehouse for your order to be picked.
- UK Supply Center prints our Reservation Pick Tickets twice daily. If you need something quickly, please call us to let us know. If you have placed a reservation through the Forms or through the Components Tab, we will need the reservation number so we can print it and process it. If you have filled out a web request from the online catalog and need it immediately, please contact Customer Service at 257-6116 so we can process it in a timely manner.
- A Requisition Form sends a Purchase Requisition directly to Purchasing for processing. All orders will be received through the Central UK Supply Center and re-directed to the unloading point of your choice.
- Requisitions placed for Non-File Items are placed directly with Purchasing.